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Australia Employee Service Management

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Employee Service Management

ServiceNow® Employee Service Management transforms how employees interact with the organization by delivering a unified, personalized, and proactive service experience across HR, Growth Experiences, Hiring Experiences, and other departments. It enables organizations deliver seamless, cross-departmental services through a single digital experience. Whether employees are onboarding, requesting workplace resources, updating personal data, or exploring internal opportunities, ESM orchestrates these interactions through end-to-end workflows.



Choose one of these tiles to get started.

Explore HR Services

Learn how HR Service Delivery applications can help you meet the demands of a modern-day workforce

Personalized, AI-Powered Journeys

Learn about the generative AI skills and capabilities offered by Now Assist for HRSD

Boost employee productivity and engagement

Explore a modern self-service experience for employees Unified Employee Experience.

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Legal and Contract Operations



Accelerate the delivery of legal and contract services by transforming manual, unstructured processes into a seamless digital experience.

Health and safety



Ensure safe and healthy working conditions for employees.

Manage a safe and efficient workplace.



Learn about maintaining a streamlined experience for your workplace using Workplace Service Delivery.

Employee Service Management products and features

Product name	Description
Employee Center Pro	The ServiceNow® Employee Center portal enables customers to easily scale their service solutions across departments, such as IT, HR, Workplace, Legal, and Procurement with digital workflows.
Case and Knowledge Management	The ServiceNow® Case and Knowledge Management application enables you to standardize the documentation, interaction, and fulfillment of employee inquiries and requests, which helps to improve HR efficiency and services over time.
Manager Hub	The ServiceNow® Manager Hub increases managers self-service and proactive engagement with their team by providing insights and recommended actions for what's most urgent and important to drive team success. It enables managers to grow as leaders through curated and personalised resources.
Now Assist for HR Service	The ServiceNow® Now Assist for HR Service Delivery (HRSD) application summarize the case information, generates resolution notes, and summarizes the chat information for an interaction.

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Employee Service Management products and features (continued)

Product name	Description
Delivery (HRSD)	
HR Service Delivery integration with third-party systems	Integrate HR Service Delivery with HR management systems to synchronize employee profiles, to-dos, and other data; background check systems to request background checks; e-signature systems to request electronic signatures; and more.
Legal Service Delivery	ServiceNow® Legal Service Delivery provides a unified experience between the employees requesting legal support and the legal teams serving them.
Contract Management Pro	The ServiceNow® Contract Management Pro solution enables you to set up contract document templates, clauses, and clause variations, and to initiate contract and amendment requests. It also supports Now Assist driven contract analysis and metadata extraction, e-signatures, wet signatures, and external storage systems.
Skills Foundation	The ServiceNow® Skills Foundation application is an AI-driven platform that you can use in your organization to develop a workforce that is based on skills.
Leader Hub	The ServiceNow®Leader Hub application empowers organizational leaders to understand the strengths of their teams, identify gaps in skills, and facilitate changes that are simultaneously conducive to their workforce and the achievement of desired business outcomes.
Workplace Reservation Management	The ServiceNow® Workplace Reservation Management application makes it easier for employees to reserve meeting rooms, conference rooms, desks, and any reservable workplace service from the Service Portal.
Workplace Case Management	Fulfilling employee workplace requests involves multiple, complex back-end processes, including analyzing the requests for type and routing them to human or automated responses, approvals, or other tasks. The ServiceNow® Workplace Case Management application makes these processes simpler and more efficient by letting you create pre-defined steps to fulfill requests.
Health and Safety Incident Management	The ServiceNow® Health and Safety Incident Management application is a solution in Health and Safety that enables organizations to record, track, and report on health and safety related employee incidents and observations. Furthermore, it provides capabilities to investigate and reduce incidents.
Journey designer	The ServiceNow® Journey designer application enables employees and managers in your organization to initiate and manage journeys to drive employee engagement and productivity.
Recruitment Workspace	The ServiceNow® Recruitment workspace centralizes job requisition tracking, boosts hiring efficiency, enhances applicant engagement, and enables recruiters to take smarter decisions with talent insights.
Interview Management	ServiceNow® Interview management streamlines the entire interview process through structured workflows designed for efficient, accurate, and on-time

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Employee Service Management products and features (continued)

Product name	Description
	scheduling—while minimizing rescheduling through in-product collaboration and integration of multi-source data.
Universal Request	ServiceNow® Universal Request empowers customers in their journey toward Enterprise Service Management (ESM) or Global Business Services (GBS) by enabling agents to resolve cases seamlessly across the enterprise to provide a better employee experience.
Universal Task	The ServiceNow® Universal Task application is a tasking framework that enables your agents to request extra information from employees who submit tickets or to task employees to accomplish an activity in order to resolve a ticket.

Additional resources

- Learn more about what's new and changed, see the Employee Service Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

HR Service Delivery

HR Service Delivery is a suite of applications that drive employee productivity from hire to retire by connecting the systems and experiences across HR and the enterprise.

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HR Service Delivery applications

Note: The Talent Development applications suite has been renamed to Growth Experiences and the Talent Acquisition application been renamed to Hiring Experiences.

AI-Powered Experiences  Learn about the generative AI skills and capabilities offered by Now Assist for HRSD	Hiring Experiences  Streamline and enhance the entire hiring journey for hiring managers, recruiters, interviewers, and applicants.	Growth Experiences  Help employees develop, grow and deliver on critical business outcomes
Employee Journey Management  Enable managers and organizations to drive employee engagement and productivity	Alumni Service Center  Provide former employees, volunteers, and contractors with access to services and resources	Manager Hub  Enable managers to self-service and proactively engage with their team
Agent Workspace  Enable agents to interact with employees, respond to inquiries, and resolve issues quickly.	Case and Knowledge Management  Standardize the documentation, interaction, and fulfillment of employee inquiries and requests	Extend HR Service Delivery capabilities  Integrate with third-party systems

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University

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- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Supporting information for HR Service Delivery

The ServiceNow® HR Service Delivery application improves the employee service experience by automating HR interactions and providing a single platform for all HR services.

HR Service Delivery applications

Depending on the HR Service Delivery package you choose, deploy one or more of the following applications.

Case and Knowledge Management

Standardize the documentation, interaction, and fulfillment of employee inquiries and requests, improving HR efficiency and services over time.

Employee Center

Provide a single, unified portal for employees to get all the information, services, and help that they need.

Lifecyle events for enterprise

Automate onboarding and other employee lifecycle events that span multiple departments, improving employee satisfaction and efficiency across HR and other departments.

Supporting applications

You can also deploy the following supporting applications.

- Document Templates to automate and simplify the process of filling, signing, and reviewing a document online.
- Employee Document Management to secure, retain, access, and purge employee files with ease using paperless document management. A separate subscription is required.
- Enterprise Service Management Integrations Framework to provide a consistent way of building integrations for common use cases such as pulling employee profiles and tasks from third-party application to a ServiceNow application, and pushing data from a ServiceNow application into a third-party application.
- HR Predictive Intelligence Workbench to guide you through your predictive machine learning implementation to create intelligent HR processes.
- Agent Workspace for HR Case Management to interact with employees, respond to inquiries, and resolve issues quickly as an HR agent.
- HR Success Dashboard indicators to help the HR leadership measure the performance of the HR implementations, using different base system or customized KPIs.
- Learning Core to build a integrated learning content repository.
- Manager Hub to increase managers self-service and proactive engagement with teams, and help them grow as leaders.
- Machine learning solutions for HR Service Delivery to help in auto determining assignment groups and services for HR cases, auto creating cases from emails, and discovering knowledge articles that help in faster resolution of cases and tasks.

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- Performance Analytics for HR Service Delivery to reduce HR inefficiencies by reporting and analyzing service delivery performance and quality. A separate subscription is required.
- Virtual Agent for HR Service Delivery to enable automated chats for employees requesting HR services.

Mobile applications

You can use the Now Mobile app with HR Service Delivery.

Employees view HR requests, request help, complete HR tasks, receive targeted mobile content and push notifications, chat with a virtual agent, and more using the Now Mobile app.

Domain separation and HR Service Delivery

Domain separation separates data, processes, and administrative tasks into logical groupings called domains. You can then control several aspects of this separation, including which users can see and access data. For more information, see Domain Separation and HR Service Delivery.

Quick start tests for HR Service Delivery

Copy and customize quick start tests to validate that your instance works after you make any configuration changes, such as after applying an upgrade or developing an application. For more information, see Quick start tests for HR Service Delivery.

Fields Containing Possibly Sensitive, Personal, or Personally Identifiable Information

Customers are responsible for ensuring their use of HR Service Delivery application is compliant with applicable data protection laws and regulations. Customers using the HR Service Delivery application should assess fields that may contain sensitive, personal, or personally identifiable information, the extent of which is solely determined by customers. Once installed, customers are able to access table definitions within their instance to review fields used by HR Service Delivery application. This can be done by navigating to "System Definition > Tables" and filtering "Name" "starts with" "sn_hr_".

COE security policies are a way to easily restrict access to different COEs via configuration. The underlying COE security policy implementations are ServiceNow ACLs.

Now Assist for HR Service Delivery (HRSD)

Use the ServiceNow® Now Assist for HR Service Delivery (HRSD) application to summarize the case information, generate resolution notes, and summarize the chat information for an interaction. You can enable your agents to understand the chat and case context so that they can propose quicker resolutions to your requesters.

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Get started

Explore  Learn about the generative AI skills and capabilities offered by Now Assist for HRSD	Configure  Configure the application to get started	Use  Provide higher levels of service by using the generative AI skills and capabilities that are offered by Now Assist for HRSD
Use Agent Collection  Use the AI agent use cases in Now Assist for HR Service Delivery (HRSD)	Reference  Get details about components such as fields, tables, and properties.	

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information about HR case data (Case Assist and KB Generation) and chat transcripts (Chat Assist), including related comments and work notes. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Now Assist for HR Service Delivery (HRSD)

With the Now Assist for HR Service Delivery (HRSD) application, your agents can summarize the customer chat conversations and case details to get the context of the case, generate the case resolution notes, and wrap up cases faster.

Now Assist for HR Service Delivery (HRSD) Overview

The following generative AI capabilities are available for an agent:

- A case summary provides an agent with a concise summary of a case. It enables an agent to get the context by gathering information about an issue and taking actions more quickly. It also enables an agent to refresh and post the summary to the work notes.
- The case resolution notes can help an agent to wrap up cases faster and provide the context about the case resolution to the other agents who might encounter similar cases.
- An interaction chat history provides the context about the chat conversation between the agents and requesters at different points of the handoff, such as when the Virtual Agent conversation chat history is handed off to a live agent.

The following generative AI capabilities are available for employees or administrators:

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- Get direct and actionable responses on customer-specific content by using generative AI in search.
- Enhance self-service by using the new Now LLM Service powered Virtual Agent experience with a simplified set-up experience.

Now Assist for HR Service Delivery (HRSD) Skills

The Now Assist for HRSD application includes the generative AI skills and features that enable your agents to understand the chat and case context so that they can propose resolutions to the requester more quickly.

Chat summarization

Provides an agent with a chat summary of all points of the handoff, including the Virtual Agent conversation and the live agent conversation:

- Quick action summary: Provides a concise summary of the interactions with the quick actions that the agent took.
- Virtual Agent handoff summary: Summarizes the chat when Virtual Agent hands off the chat to a live agent.
- Live Agent to Live Agent handoff summary: Summarizes the conversation when a live agent hands off a chat to another live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before hand off to another live agent.
- Chat wrap up summary: Accelerates the wrap-up time by populating the full chat summary when a conversation ends.
- Chat wrap up short description: Accelerates the wrap-up time by populating the short description that summarizes the requester issues when the conversation ends.

For information on activating the chat summarization skill, see Configure chat summarization and chat reply recommendation skills in the Now Assist Admin console. For information on how to use the skill on Agent Workspace for HR Case Management, see Summarize a chat conversation using Now Assist for HR Service Delivery (HRSD).

The following example shows an AI-generated chat summary.

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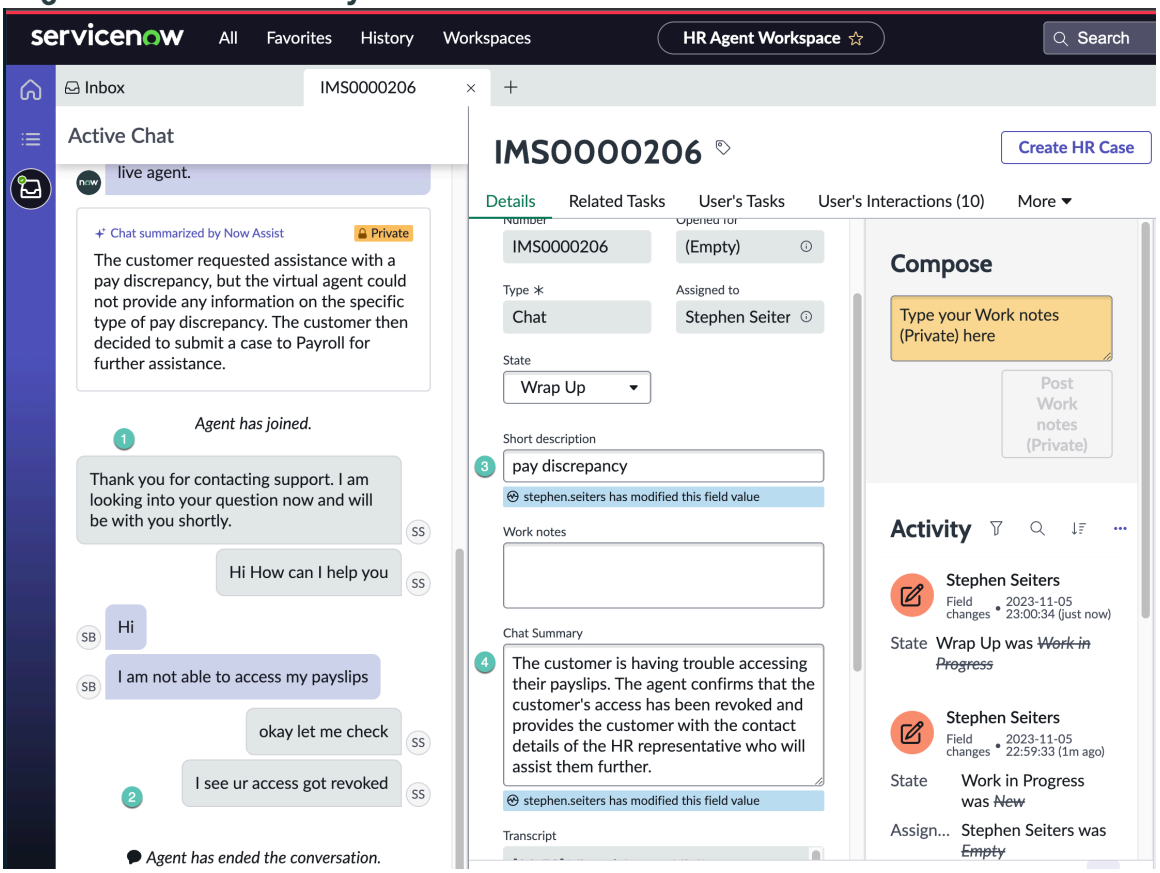
AI-generated chat summary



- 1: The agent accepts the chat with the requester and gets any additional details.
- 2: The agent provides the details and ends the conversation.
- 3: The chat summarization skill automatically updates the short description in the **Short description** field.
- 4: The chat summarization skill automatically updates the chat summary in the **Chat Summary** field.

Case summarization

Provides an agent with a concise summary of a case, including the issue, actions that were taken, SLA, attachment summary and resolution information, depending on the state of the case. An agent can view a case summary to understand the case context, refresh the summary, and post the summary to the case work notes.

For information on activating the case summarization skill, see Configure case or incident summarization in the Now Assist Admin console. For information on how to use the skill on Agent Workspace for HR Case Management or Core UI, see Summarize an HR case using Now Assist for HRSD.

The following example shows an AI-generated case summary.

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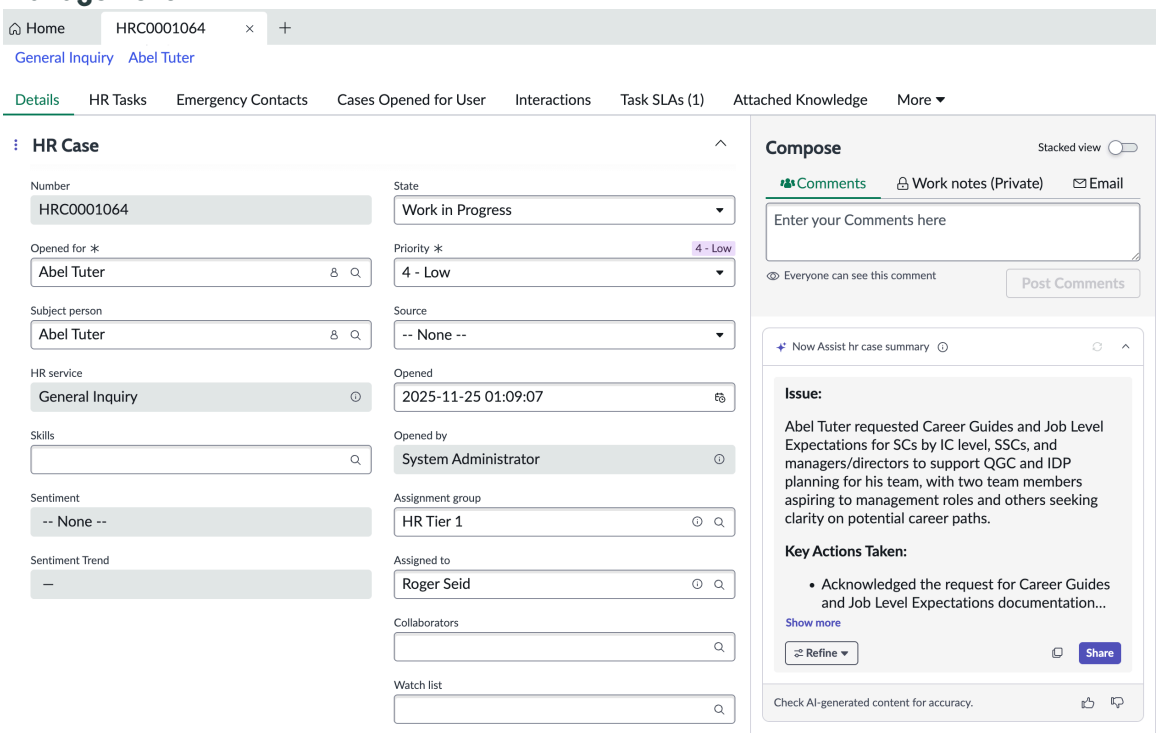
AI-generated case summary on Agent Workspace for HR Case Management



Resolution notes generation

Automatically generates the resolution notes for an agent when the state of a case is changed to Closed Complete. An agent can accept the AI-generated notes or edit the notes before saving it to the case.

For information on activating the resolution notes skill, see Configure Now Assist for HR Service Delivery (HRSD). For information on how to use the skill on Agent Workspace for HR Case Management, see Generate resolution notes using Now Assist for HRSD.

The following example shows the AI-generated resolution notes.

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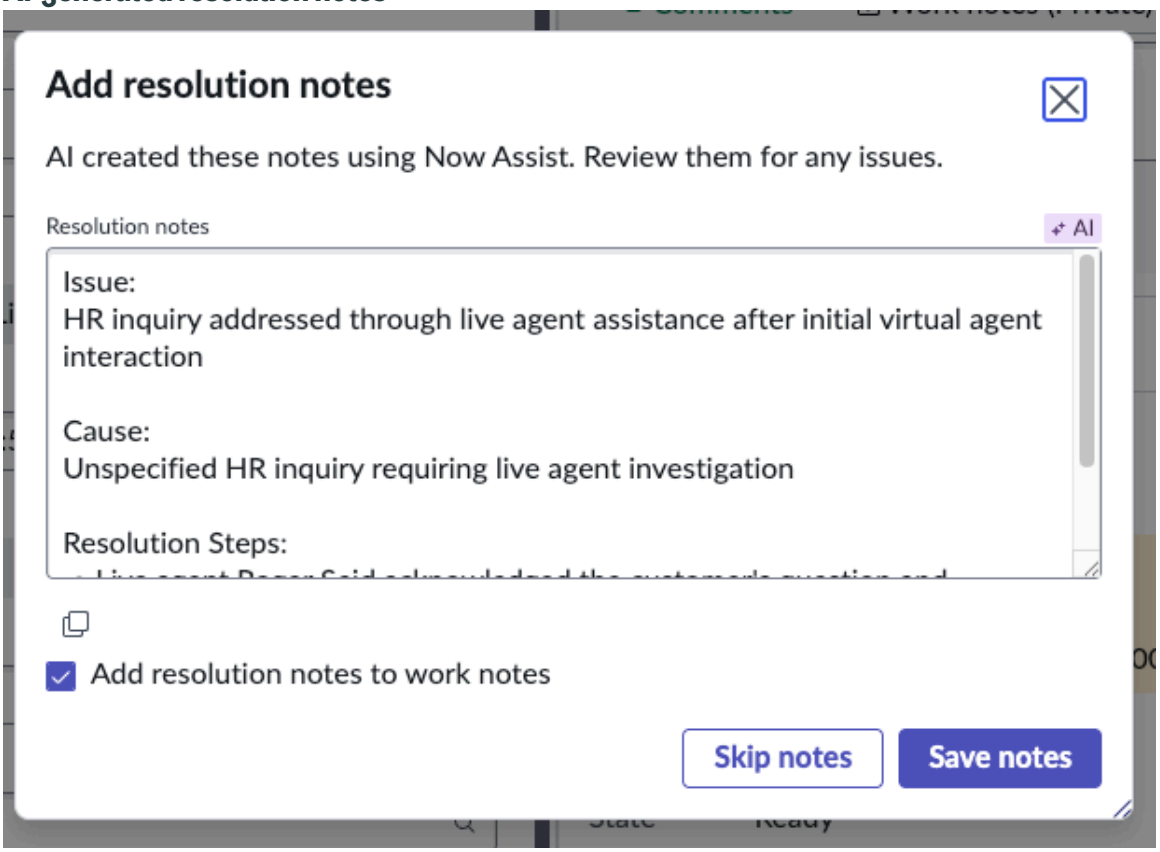
AI-generated resolution notes



Knowledge generation

Enables an agent to generate a knowledge article from a case after proposing a resolution or closing the case.

The knowledge generation skill displays a pop-up window that an agent can use to generate a knowledge article and review it before publishing the knowledge article draft.

Redirection for sensitive topics

Certain subjects, such as workplace safety or employee compensation, might not be suited for generative AI conversations. Now Assist for HR Service Delivery (HRSD) includes out-of-the-box filters to detect sensitive topics.

The admin activates the filters or creates custom filters to enable the Virtual agent to detect if these kinds of subjects are included in the conversation and offer the following redirection options:

Live agent

The employee is redirected to the relevant chat queue to connect with a live agent.

Case

The employee can open a case, which is assigned to the respective HR service.

Proceed, this is not sensitive

In situations where the LLM incorrectly identifies a phrase as a sensitive topic, employees can opt to continue the interaction with the Virtual Agent.

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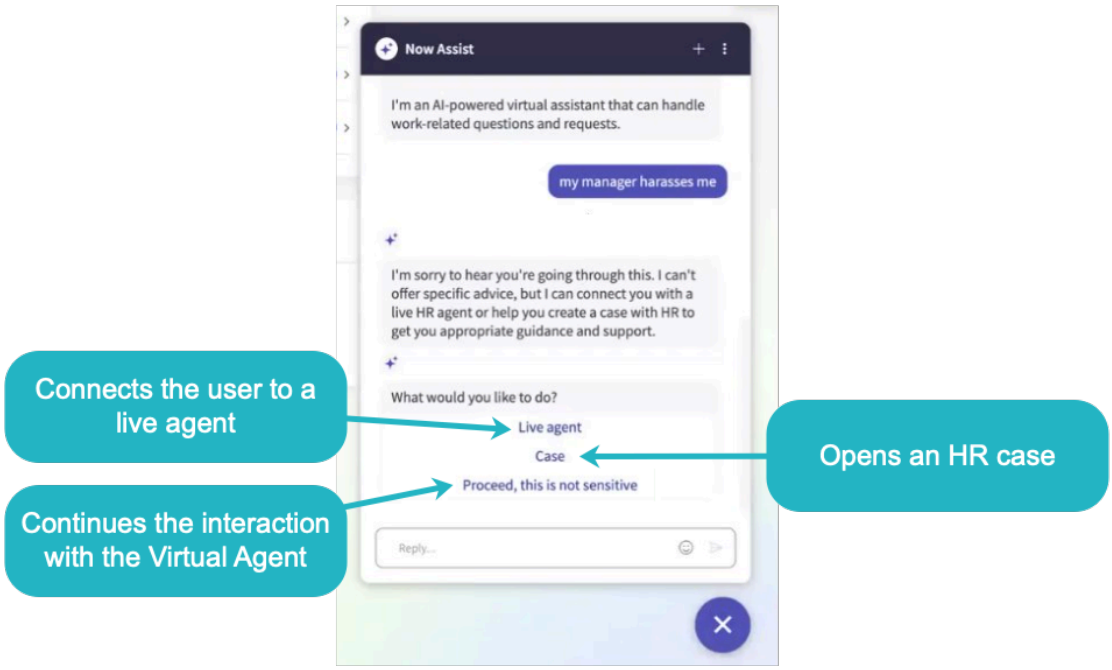

For more information on the out-of-the-box filters and how they are mapped to chat queues and HR case services, see Sensitivity detection filters mapping.

For information on setting up sensitivity detection, see Configure sensitivity detection.

Sentiment Analysis

Sentiment analysis helps agents prioritize cases based on a sentiment score ranging from -5 to +5 to represent extremely negative to extremely positive. It is available in both the HR Agent workspace and core UI views.

For more information on using sentiment analysis in HR Service Delivery, see Analyze sentiments in Now Assist for HR Service Delivery (HRSD).

Now Assist panel in the Agent Workspace for HR Case Management

The Now Assist panel provides agents with a conversational interface that they can use to request the chat and case summaries on demand.

For more information about the Now Assist panel, see Use the Now Assist panel in HR Agent Workspace.

Now Assist for HR - Galileo Inside

Enable users to access HR articles and industry research from Galileo by The Josh Bersin Company in the Now Assist panel or Now Assist Virtual Agent.

HR professionals, managers, and employees can submit queries on topics including company-specific policies or industry-wide best practices. Now Assist for HR - Galileo Inside generates responses based on the KB articles on the customer instance, as well as articles and documents in the Galileo library.

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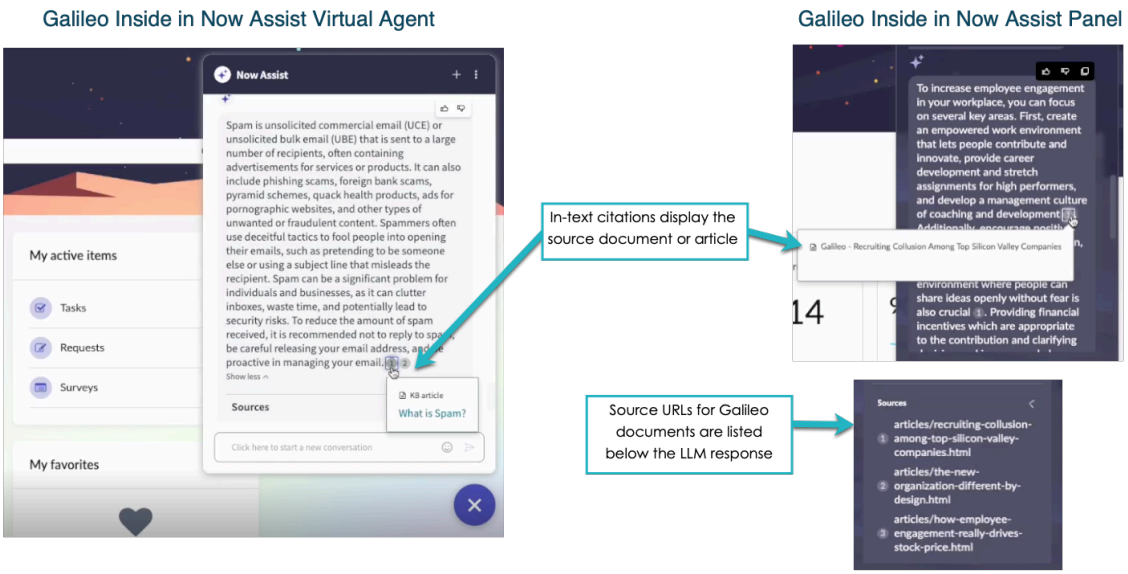

Galileo Inside uses Retrieval-Augmented Generation (RAG) to generate responses to user queries based on relevant articles and research, delivering accurate domain-specific information in real time.

A one-time configuration provides continuous access to the Galileo library with monthly updates to ensure users have the latest information. For more information, see Configure Now Assist for HR - Galileo Inside.

Supporting information for Now Assist for HRSD

Get a quick overview of the important information that is related to the Now Assist for HR Service Delivery (HRSD) application.

Supported versions

Now Assist for HRSD is supported starting with Vancouver Patch 2.

Supported language models

Use the Now LLM Service or any of the following supported third-party small or large language model with any Now Assist for HR Service Delivery (HRSD) skill or AI agent:

- Azure OpenAI
- AWS Anthropic
- Google Gemini

Supported user interfaces

The Now Assist for HRSD application includes the skills that are listed in the following table.

Now Assist for HRSD supported interfaces

Interface	Skill
Agent Workspace for HR Case Management	• Case summarization • Chat summarization • Resolution notes generation

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Now Assist for HRSD supported interfaces (continued)

Interface	Skill
	• Knowledge article generation • Sensitivity detection • Email reply recommendation
Core UI	• Case summarization • Knowledge article generation • Sensitivity detection

Application information

Activate the Now Assist for HRSD store app (sn_hr_gen_ai) to use the chat, case, and resolution skills.

The Now Assist for HRSD application has the following dependencies:

- Human Resources Scoped App: Core (com.sn_hr_core)
- Now Assist Platform (com.sn.now.platform)
- NA-TD and NA-TA are dependent apps for NA-HR and should be installed for every NA-HR installation (talent-core: sn_egd_core and interview-scheduling sn_int_schedule)

Configure Now Assist for HR Service Delivery (HRSD)

If you have the admin role, you can configure the Now Assist for HR Service Delivery (HRSD) application so that your agents can use the generative AI capabilities in Agent Workspace for HR Case Management and Core UI.

Role required: sn_hr_core.admin

Use the Now Assist Admin console to configure Now Assist for HR Service Delivery (HRSD). This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

The following list contains skills that you can access from the Now Assist Admin console.

- Chat reply recommendation
- Chat summarization
- Sidebar discussion summarization
- Case summarization
- Resolution notes generation
- KB generations
- Email recommendation
- Sensitivity detection
- Journey generation for managers
- Journey summarization for managers

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- Employee information summarization
- Manager insights

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

Now LLM Service is currently the only provider for this Now Assist application's skills.

Procedure

1. Install the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).

   Note: For information about the plugin dependencies and plugin activation order, see Supporting information for Now Assist for HRSD.For information about the installation process, see Install Now Assist plugins .

2. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
3. Activate and configure the skills for the Now Assist for HR Service Delivery (HRSD) features.

   Note: These features are grouped under the **Employee** workflow group. Each feature has its associated skills.

4. On the skill that you would like to activate, select **Activate Skill**.

General Configuration Steps

Each skill has its own configuration process. However, skill activation follows the same guided setup. What configuration steps are required varies depending on the skill.

Common configuration components include the following:

- **Trigger:** Allows you to configure the circumstances in which a skill is generated. For example, chat summarizations can be configured to generate when the chat handoff is done from a live agent to a live agent.
- **Input:** Configure the data used to create the information generated by the skill. For example, resolution notes information is generated from the description, short description, work notes, and the additional comments fields of existing case notes.
- **Availability:** Customize how and when the skill capability is active and accessible. For example, email reply recommendations can be configured to be always available, or defined using the condition builder to determine whether a user can activate the skill.
- **Access:** Determine who can access this skill. By selecting specific roles, you control who can use it. The roles you choose are also available in the next step, **Select display**.
- **Display:** Determine where the skill appears. For example, the call summarization skill can be configured to display on forms and workspaces or in the Now Assist panel.

Saving and activating the configuration setup process is the same across all Now Assist skills.

Skill inputs and triggers for Now Assist for HRSD

Get a quick overview of the skill inputs and triggers for Now Assist for HR Service Delivery (HRSD). By configuring the inputs or triggers for a skill, you can determine how and when a skill is used.

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Depending on the selected skill, you can configure the inputs or triggers. These settings determine how and when a skill is used. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a case summary. A trigger initiates an action, such as when the system generates a chat summary.

Chat summarization skill

For the chat summarization skill, select the triggers that determine when a chat summary is generated and how a chat summary is displayed.

The following table lists the triggers that you can configure for the chat summarization skill of the Chat Assist feature.

Triggers for the chat summarization skill

Trigger	Description
Virtual Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from Virtual Agent to a live agent.
Quick action	Chat summary that is generated when the live agent performs the `/summarize` quick action.
Short description	**Short description** field that is updated for the interaction when the live agent ends the chat.
Chat wrap-up	Chat summary that is generated when the live agent ends the chat. The **Chat Summary** field is updated for the interaction.
Bulleted list	Chat summary as an unordered list.
Task creation	**Short description** and **Description** fields that are auto-populated when a task is created.

Case summarization skill

The case summarization skill includes the inputs that identify the table and fields that are used when a case summary is generated.

Note: These fields are read-only.

The following table lists the inputs for the case summarization skill.

Inputs for the case summarization skill

Input	Description
Input table	HR Case [sn_hr_core_case]
Input fields	• Description • Priority • Short description • State • Additional comments • Work notes

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Note: Case summarization is not available for **Cancelled** or **Suspended** cases.

Resolution notes generation skill

The resolution notes generation skill includes the inputs that identify the table and fields that are used when the resolution notes are generated for a case.

Note: These fields are read-only.

The following table lists the inputs for the resolution notes generation skill.

Inputs for the resolution notes generation skill

Input	Description
Input table	HR Case [sn_hr_core_case]
Input fields	• Short description • Description • State • Additional comments • Work notes

Case sentiment analysis skill

The case sentiment analysis skill includes the inputs and outputs that identify the table and fields that are used when a case sentiment is generated.

Inputs for the sentiment analysis skill

Input	Description
Input table	Case [case]
Input fields	• Short description • Description • Priority • State • Creation date • Activities

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Outputs for the sentiment analysis skill

Output	Description
Sentiment values	• Positive • Neutral • Negative
Sentiment trend	• Improving • Declining • Stable
Sentiment reasoning	Reasons for providing the sentiment value.

Scheduled job for the sentiment analysis skill

Scheduled job name	Default value	Description
Sentiment analysis scheduled job (case)	True	Refreshes sentiments on the Trigger frequency screen for the Sentiment analysis skill.
Update sentiment historical records	False	When active, calculates sentiment and sentiment trends for historical records.

Knowledge article generation skill

The knowledge article generation skill includes the inputs that identify the table and fields that are used when a knowledge article is generated for a case.

Note: These fields are read-only.

The following table lists the inputs for the knowledge article generation skill.

Inputs for the knowledge article generation skill

Input	Description
Input table	HR Case [sn_hr_core_case]
Input fields	• Short description • Description • Close notes (for HR cases) • Additional comments • Work notes

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RCA approvals for Now Assist for HR Service Delivery (HRSD)

After you install Now Assist for HR Service Delivery (HRSD), you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request.

Before you begin

- Role required: admin
- The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming.

  To automate the RCA approvals for any record, you can run the **Now Assist for HRSD Bulk RCA approval** script where the source scope is Now Assist for HR Service Delivery (HRSD). Download the **Now Assist for HRSD Bulk RCA approval** file from the **Supporting Links and Docs** section in Now Assist for HR Service Delivery (HRSD) application in ServiceNow Store. This file is a standalone script to reduce the manual effort involved. After you download the script file, perform the following steps:

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Right-click the header and choose **Import XML**.
3. Click **Choose file** and select the XML file that you downloaded.
4. Search and find the **Now Assist for HRSD Bulk RCA approval** script record.
5. Click **Run Script** to allow all the requested RCAs.

Restrict Now Assist capabilities for employee relations cases

Restrict the Now Assist capabilities for your employee relations cases and define the availability.

Before you begin

- Role required: admin

Procedure

1. Navigate to **Now Assist Admin Console** > **Employee**.
2. Select the **Gen AI** feature that you want to restrict the behavior for.
3. On the **Define Availability** tab, modify the condition and add **Task type is not Employee Relations Case**.

Customize the Now Assist for HRSD skills

Customize a Now Assist skill so you can experiment with skill settings and configure the skill to fit your business needs.

Role required: sn_hr_core.admin

The skills that come with the Now Assist applications have defaults configurations that are optimized to serve the most common use cases. The base system skills can be tailored to meet specific business requirements. Customization ensures that skills align with your organization's workflows, data sources, and user roles. There are two main ways to customize:

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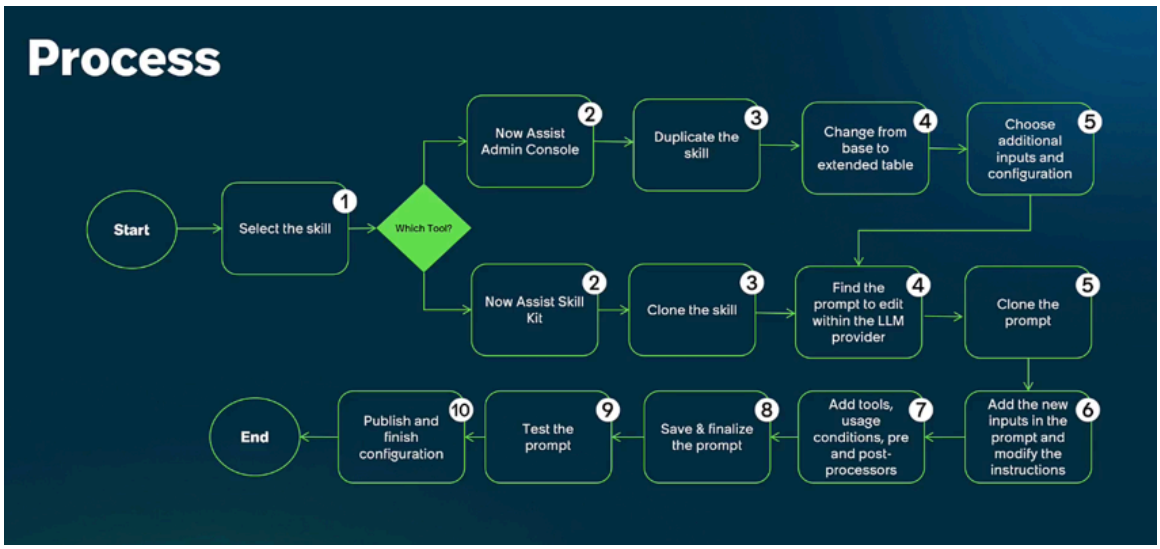
- Using Now Assist Admin console: Modify base system skills, input configurations, and display settings. Make a copy of the skill as you cannot directly modify the base system skill. For more information, see Make a copy of a Now Assist skill.
- Using Now Assist Skill Kit: Build and publish custom skills for advanced use cases by customizing inputs and prompts, and then publish it. You can also use the Now Assist Skill Kit to clone base system skills, as long as they are the latest versions created after the release of the Now Assist Skill Kit. For more information, see Using Now Assist Skill Kit

Unified Admin Experience for GenAI Skills:

- Previously, skills cloned in Now Assist Admin console supported only prompt configuration in Now Assist Skill Kit. Input configuration could not be edited in Now Assist Skill Kit, creating a fragmented setup process. With the new unified admin experience, users can manage GenAI skills seamlessly in Now Assist Skill Kit. This includes adding necessary headers as input, configuring or editing prompts, and maintaining all settings in a single location.
- The unification migrates the Now Assist Admin console setup experience to Now Assist Skill Kit for all configured skills in Now Assist for HRSD..



Configure attachment summary

Customize the case summarization skill in Now Assist for HRSD to include summaries of case attachments.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All>Now Assist Admin>Skills**.
2. Select **Employee**, then select **HRSD**.
3. Make a copy of the case summarization skill.
   For more information, see Make a copy of a Now Assist skill.
4. Navigate to the Choose input step.
5. In the **+New data source** drop-down, select **Activity: Attachment**.
   Configure this data source for all required input templates (Case new, Case work in progress, or Case resolved states).
6. Review the remaining sections, then select **Activate**.

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Configure resolution notes generation for Now Assist for HRSD

Configure the resolution notes generation skill to create concise summaries of case resolutions and enable agents to use the Now Assist context menu to elaborate or shorten the notes.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
2. Select **Employee**, then select **HRSD**.
3. Select **Activate skill** on the **Resolution notes generation** tile.

   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select the state in which the skill activates, then select **Save and continue**.
6. Select **Choose Input** and review the tables and fields to define the prompts that determine where data is pulled from.
   You can modify the rule conditions to determine when the input template is used. Additional data sources can be added via related tables as well.
7. NASK.
8. Select **Define availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
9. Select **Define access** to determine who can access this skill.
10. Select **Display** to determine where the skill appears.
    - Select **In-product desktop** to display Now Assist skills on forms and workspaces. Then, select the roles for whom the skill will be displayed.
    - Select **Now Assist panel** to display Now Assist skills in the Now Assist panel.
11. After selecting **Review and activate** to examine changes, select **Activate** to turn on the skill and complete the configuration.
12. In the Successfully activated pop-up window, select **Go to Now Assist context menu**.
13. Review the details.
14. Review the actions for the context menu trigger button and dialog.
15. In the Define access window, define who has access to the skill.
16. In the Select display window, enable **In-product desktop**.
17. Select **Review and activate** to examine changes, then select **Activate**.

Extend table support for resolution notes generation

Extend table support for the resolution notes generation skill to include additional data sources.

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Before you begin
Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **Now Assist Skill Kit** > **Home**.
2. Select your skill from the **Custom skills** or **ServiceNow skills** tab.
3. In the Skill contents section, select the Edit Skill Input icon beside **inputs**.
4. In the **Input table** field, select the table you want to include as a data source.
5. Select **Save**.

Configure sensitivity detection

Configure sensitivity detection in the Now Assist for HR Service Delivery (HRSD) application.

Before you begin
Role required:sn_hr_core.admin

About this task
This capability helps you configure sensitivity detection and filters for the types of sensitive cases such as the harassment complaints, discrimination allegations, workplace violence, safety, employee behavior, and employee personal issues. You can also block Now LLM Service from engaging with these sensitive case types to allow agents to create cases for these sensitive case types.

Note:

Configurations are available on the Now Assist Admin Panel settings as part of Now Assist guardian. The **sn_hr_gen_ai.admin** role can only **Edit**, **Activate** and **Deactivate** skills on **Guided** setup view only.

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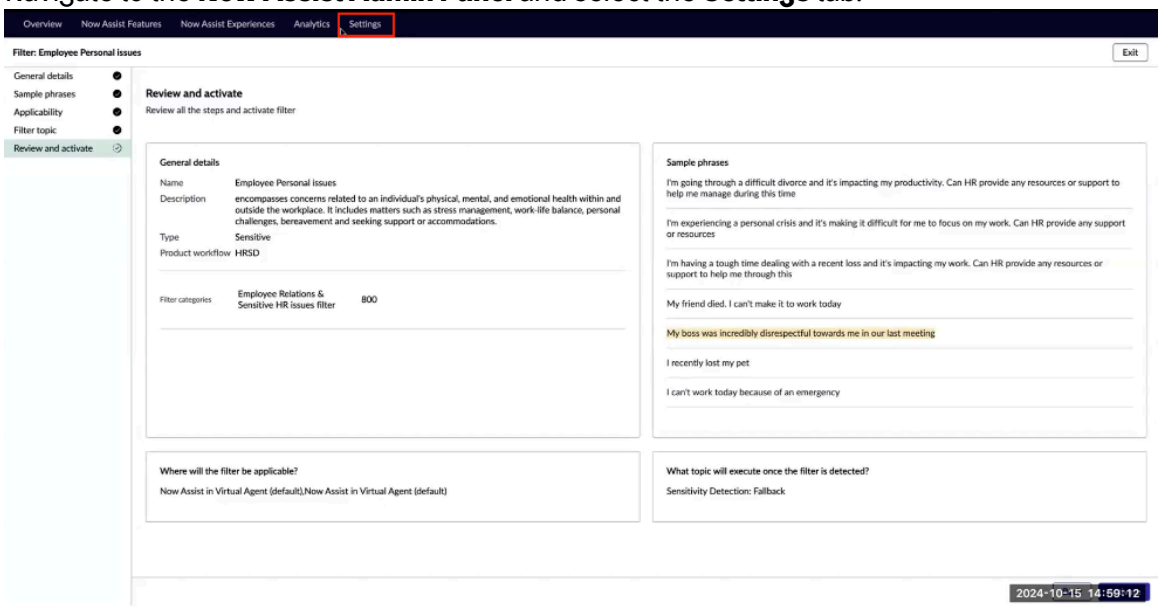
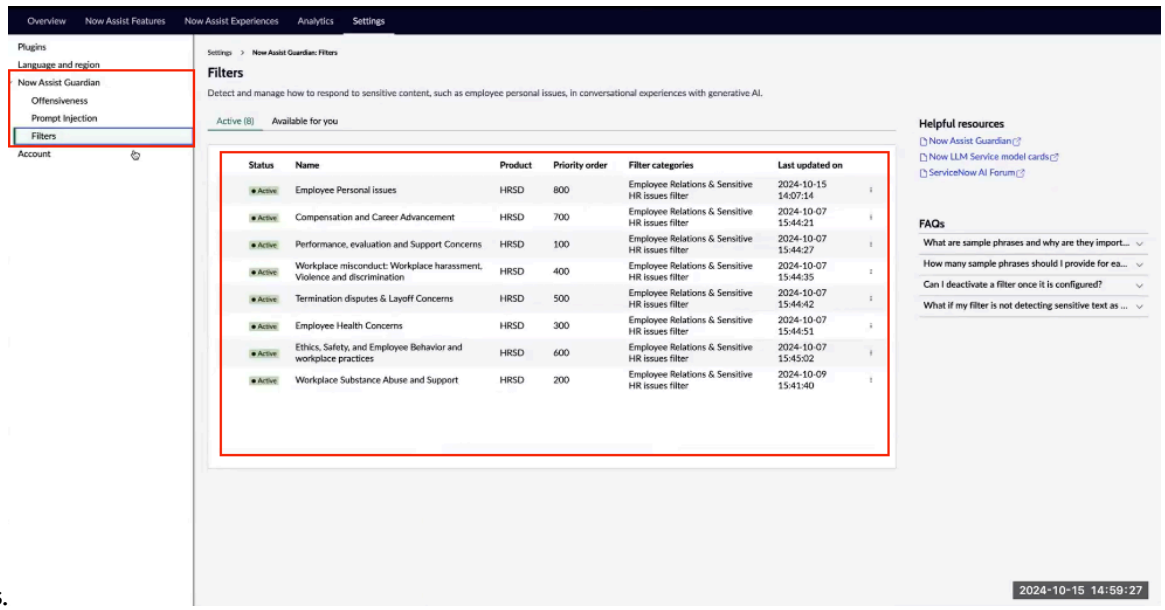
Procedure

1. Navigate to the **Now Assist Admin Panel** and select the **Settings** tab.



2. Select **Now Assist Guardian** and select **Filters**.



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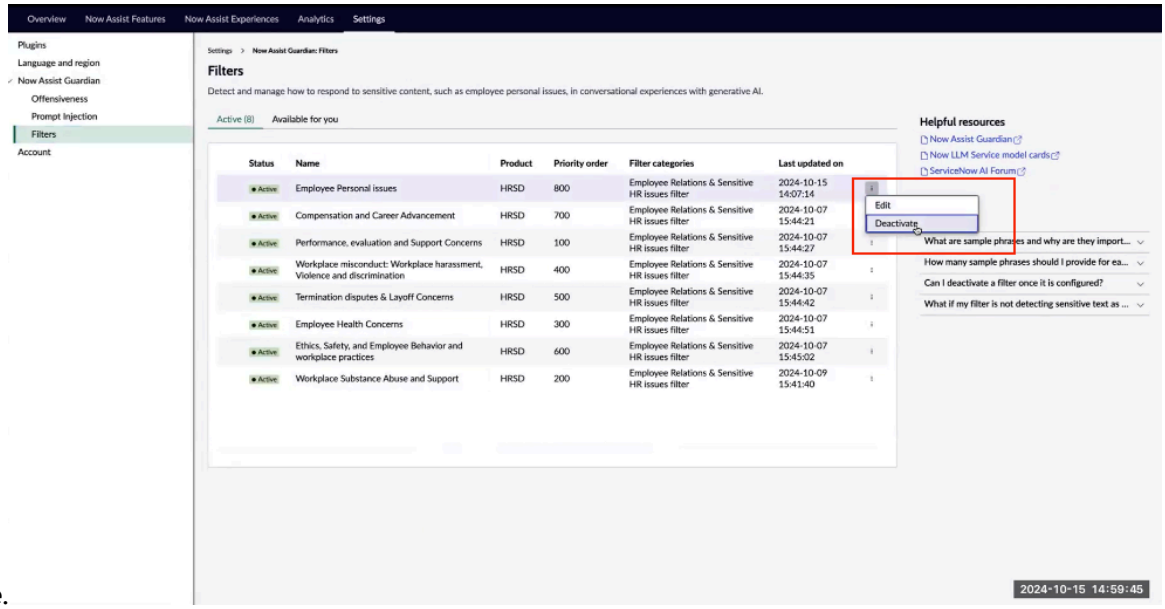
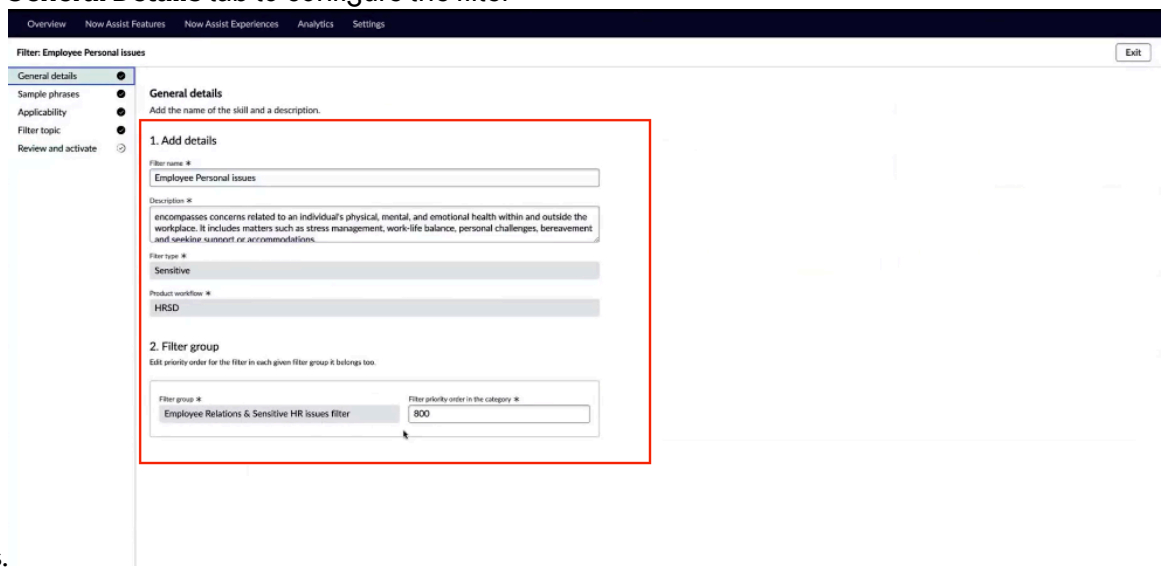
Filter configurations include the ability to **Edit** or **Deactivate** a filter. Only **sn_hr_gen_ai.admin** can **Edit** or



Deactivate.

3. Select **General Details** tab to configure the filter



details.

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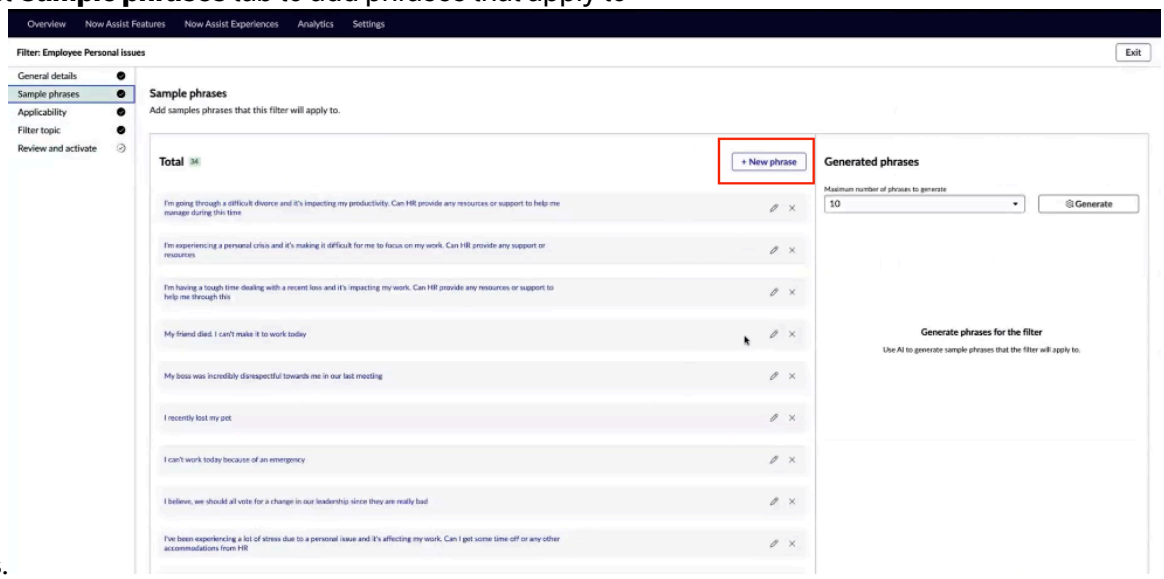
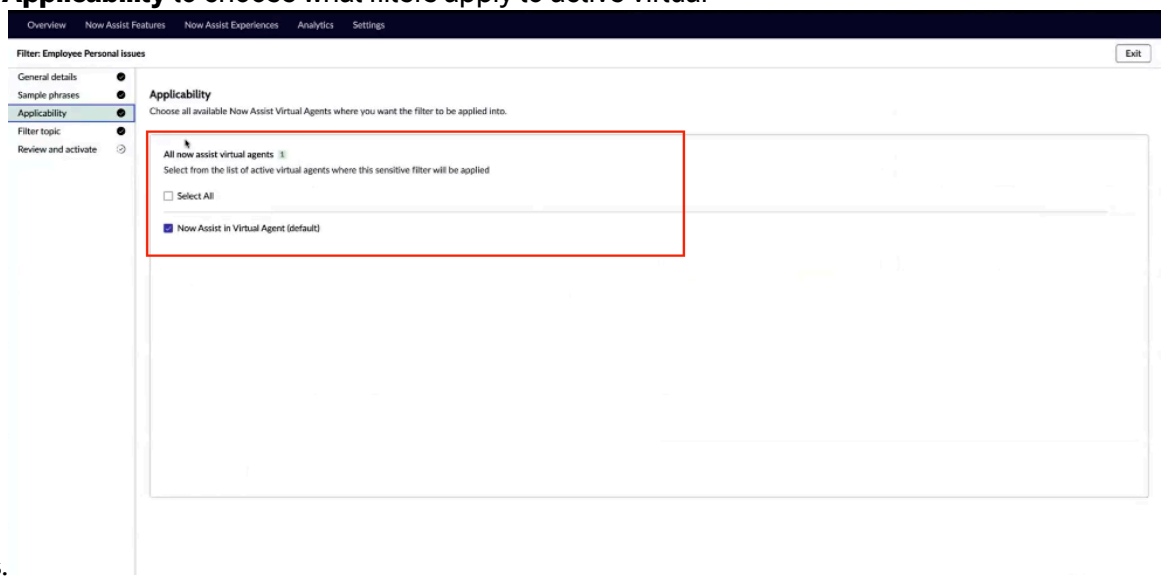
4. Select **Sample phrases** tab to add phrases that apply to filters.



Note: The ability to edit and update existing filters is available. There is a maximum of 10 phrases that can be generated.

5. Select **Applicability** to choose what filters apply to active virtual agents.



Result

When an employee enters one of the configured sensitive phrases, the virtual agent offers to either redirect the employee to a live agent, create a case, or if the virtual agent incorrectly identifies a sensitive topic, the employee can select to proceed with the interaction.

Related topics

Now Assist Guardian

Sensitivity detection filters mapping

Configure Gen AI Virtual Agent for HRSD

Enable your requesters to have a streamlined, conversational experience that is based on generative AI as they submit a catalog item request in Virtual Agent. By offering this generative AI experience, your organization can increase self-service and reduce operating costs.

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Before you begin
Role required: sn_hr_core.admin

About this task
The generative AI capabilities can provide a human-like, efficient catalog request experience over the Virtual Agent conversational interface. By using the generative AI capabilities with Virtual Agent, your organization can reduce the turnaround time for the request submission.

When the generative AI experience is configured for catalog item request submissions, the following experience is available for a requester:

- Contextual question prompts that enable a more human-like conversation based on answers to previous questions.
- Slot filling that recognizes answers to one or more questions on the requester's input. For example, inquiring about HR benefits or requesting leave of absence.
- Ability to answer catalog item questions.
- Ability to exit the request submission process at any point.
- Although the following catalog item question types are supported in the conversation mode, natural language responses aren't supported:
  - Reference
  - Lookup select box
  - Lookup multiple choice
  - Requested For
  - Attachment
  - Multiple choice question with more than 10 choices

Procedure
1. Turn on the required Virtual Agent Skills: **Multi-Assist Multi-turn Catalog Ordering** and/or **Now-Assist Q&A Genius Results**.
2. Set up Now Assist in Virtual Agent.
   For complete details on how to turn on the skills and set up Gen AI Virtual Agent, see Configuring assistants overview.

Note:
- Configure the required conditions for the Virtual Agent Skills.
- HR Service Delivery Virtual Agent will be replaced with the Gen AI Virtual Agent.

Configure the Now Assist for HRSD Virtual Agent topics

Complete the configuration steps to enable your employees place requests to the Human Capital Management (HCM) system using the Now Assist for HRSD Virtual Agent topics in Employee Center.

Before you begin
Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

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Procedure

1. Install the Now Assist for HRSD and Enterprise Service Management Integrations Framework (v3.6) applications from ServiceNow Store.
2. Configure the required ServiceNow spokes or customize spokes to pull data from HCM systems.
3. Create subflows for provider aligning with Template Integration Gateway.
   See Create a subflow using Template Integration Gateway.

   Note:

   - Subflows have been created for Oracle HCM, except for the Request Time off and Add Expense Virtual Agent topics. The Virtual Agent experience has been provided for the Request Time off and Add Expense topics, but without the back-end support through subflows. For more information on the default Virtual Agent topics, see Now Assist for HRSD Virtual Agent topics.
   - The subflows for Oracle HCM can be used as a reference to build subflows for any other HCM systems.

4. Configure Integration Provider Mapping (Decision table) by adding input choices, configuring conditions on input choices and results.
5. Create a Virtual Agent topic block:
   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. From the **LLM Assistant** list, select **Now Assist in Virtual Agent**.
   c. Filter the topics by setting the category to **Now assist for HR service Delivery**.
   d. Select a Virtual Agent topic.
      i. Edit topic properties and make the necessary edits in the topic, such as update the node name, and response message.
      ii. In Integration Gateway, specify the appropriate feature, service name, user, and make the necessary edits.

      Note: To publish the Virtual Agent topics in Now Assist for HRSD, publish these topic blocks: **Get Authentication** and **Process Integration Errors**.

What to do next

When an Virtual Agent topic invokes the Integration Gateway subflow, the subflow reviews input values in Integration Provider Mapping (Decision table) to execute results.

Configure HCM AI agents from the HR Service Delivery AI Agent Collection

Enable your employees to place requests to the Human Capital Management (HCM) system using the Now Assist for HR Service Delivery (HRSD) agent collection.

Before you begin

Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

Procedure

1. Install the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).
   For more information, see Configure Now Assist for HR Service Delivery (HRSD).
2. Activate the [Enterprise Service Management Integrations Framework] application from the ServiceNow® Store.

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3. Configure the required ServiceNow spokes or customize spokes to pull data from HCM systems.
   For more information, see Integration of HR Service Delivery with third-party systems.
4. Create subflows aligning with Template Integration Gateway, or use default subflows that have been created for your HCM system.
   For more information, see Create a subflow using Template Integration Gateway.

   Note: The subflows for Oracle HCM can be used as a reference to build subflows for any other HCM systems.

5. Add input choices and define conditions and results in a decision table for the Integration Gateway subflow.
   For more information, see Configure Integration Provider Mapping (Decision table).
6. Duplicate available HCM AI agents to run them autonomously.
   For more information, see Duplicate an AI agent For list of available agents, see Using agentic workflows in Now Assist for HRSD.

   Note: In the Toggle display section, ensure the toggle beside Virtual Agent is enabled.

Configure HR AI voice agents

Enable employees to complete tasks, resolve issues, and access information through a conversational experience.

Before you begin

Role required: sn_voice_aia.admin or sn_hr_voice_aia.admin

Install the following plugins:

- Now Assist for HR Service Delivery (HRSD) plugin [sn_hr_gen_ai]
- Now Assist Voice [sn_voice_aia]
- HR Voice AI Agents [sn_hr_voice_aia]

Procedure

1. Follow the steps to Create an AI voice assistant
2. Activate the HR AI voice agents.
   a. Navigate to **All** > **AI Agent Studio** > **Create and manage** and select the AI agents tab.
   b. Filter the agents by `Application is HR AI Voice Agents`.
   For more information on the HR-specific agents, see HR AI voice agents.
3. For the following AI voice agents, perform these additional configuration steps.

AI agent	Steps
HR Case assistant	a. Navigate to **All** > **AI Search** > **AI Search In dex** > **Indexed Sources**. b. Locate and open **HR Case**. c. Select **Index selected tables**.
Employee Details Updater, Holiday Calen dar, Retrieve Worker Profile, Time off Re quester	a. Install the Oracle plugins: ▪ sn_oracle_hcm_spk (4.1.1 or later) ▪ sn_hr_oracle_hcm (1.0.10 or later)

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AI agent	Steps
	▪ sn_hr_integr_fw (3.8.1 or later) ▪ sn_hr_oracle_adv (1.2.1 or later) ▪ com.glide.hub.integrations.enterprise **b.** Follow the steps to Set up the Oracle HCM

What to do next

Assign roles to admins and users to grant them access to Voice features. See Components installed with voice.

Related topics

HR AI voice agents

Configure manager insights for Now Assist for HRSD

Configure the manager insights skill in Now Assist for HRSD to generate a summary of team data in Manager Hub.

Before you begin

Role required: sn_hr_gen_ai.admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
2. Select **Employee**, then select **HRSD**.
3. On the **Manager Insights** tile, select **Turn on**.
4. In the Add user access section, select individuals or groups that can utilize this skill.
5. In the role restrictions to skill section, select roles that have access to resources during skill execution.
6. Select **Turn on**.

Configure Now Assist for HR - Galileo Inside

Enable users to access functionality and benefits of the Now Assist for HR - Galileo Inside [sn_hr_na_galileo] plugin by completing a short installation and configuration process.

Before you begin

Obtain the API key from The Josh Bersin Company.

Role required: admin

Procedure

1. Install the Now Assist for HR - Galileo Inside (sn_hr_na_galileo).
   For information about the installation process, see Install Now Assist plugins.
2. Input your Josh Bersin credentials into your ServiceNow instance.
   a. Navigate to **All** > **IntegrationHub** > **Credentials**.
   b. Select **Galileo Inside API Key**.

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c. In the **API Key** field, delete the placeholder value and enter the API key you received from the Josh Bersin company.

d. Select **Update**.

3. Load Galileo data into your ServiceNow instance.

a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

b. Select **Fetch and Index Galileo data**.

c. Select **Execute Now**.
The process to fetch and index the Galileo data takes between two to four hours. After four hours, check the sn_hr_gen_ai_external_content_connector_metadata table for a record to confirm the indexing result.

When the scheduled job is done, the Galileo data is available to users with the `n_hr_na_galileo.read` or `n_hr_na_galileo.admin` roles.

What to do next

Next, assign the `sn_hr_na_galileo.read` role to users to enable them to interact with Now Assist for HR - Galileo Inside.

Related topics

Use Now Assist for HR - Galileo Inside to answer HR-related questions

Using agentic workflows in Now Assist for HRSD

Use the HR Service Delivery AI agent collection to complete tasks autonomously.

Available agentic workflows for HR Service Delivery AI Agent Collection

Agentic workflow name	Description	Available AI agents
Help resolve tuition requests	AI agents resolve tuition reimbursement pre-approval requests by connecting to various parties (for example, the manager for approval) and resolving the case, while keeping the human agent in the loop.	• Tuition reimbursement policy based HR case evaluation AI agent • Tuition reimbursement case closure AI agent • Tuition reimbursement preapproval task generation AI agent
Help resolve tuition reimbursement requests	AI agents resolve tuition reimbursement requests that were already pre-approved and the employee completed the course.	• Tuition reimbursement request evaluator AI agent • Tuition reimbursement request closure AI agent
Predict service and transfer HR cases	Analyze an HR case and automatically route it to the most appropriate HR service.	• Record field value prediction AI agent • HR Case Transfer AI Agent

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Available agentic workflows for HR Service Delivery AI Agent Collection (continued)

Agentic workflow name	Description	Available AI agents
Resolve noncritical HR cases	Use the Resolve noncritical HR cases agentic workflow to assess the criticality of HR cases and automatically respond to noncritical inquiries without human intervention. Human agents must intervene when requests are marked critical.	• HR search and notify AI agent • HR criticality detection AI agent
Resolve critical HR cases	Resolve critical HR requests efficiently with the Resolve critical HR case agentic workflow. This workflow generates a tailored fulfillment plan for an HR case using fulfillment instructions, KB articles, or resolution notes of similar past cases. It helps accelerate the resolution process by providing planning support to HR agents.	• HR Case Planner AI Agent • Next action recommended AI agent
Schedule interviews	AI agents collect necessary inputs from the recruiters or recruitment coordinators and schedule interviews seamlessly from the Now Assist panel.	Interview schedule AI agent
Create job requisition	AI agents assist hiring managers in creating requisitions more efficiently and accurately on the first attempt by providing the necessary guidance through the agentic workflow.	Job requisition creation AI agent

Available HCM agents for HR Service Delivery AI agent collection

Available AI Agent	Description
Worker profile retriever AI agent	Calls an integration subflow to assist the employee in finding out details about a colleague. The details could include the department, job, email, or phone number that is based on the employee's request by name.
Employee holiday calendar retrieval AI agent	Retrieves the holiday information for the specified year.

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Available HCM agents for HR Service Delivery AI agent collection (continued)

Available AI Agent	Description
Time off requester AI agent	Calls an integration to assist in leave-related requests: • Request time off • Get my time off balance
Employee total rewards information AI agent	Retrieves the total rewards details of an employee.
Benefits enrollment retriever AI agent	Calls an integration subflow to get the benefits information that an employee has signed up for.
Employee details updater AI agent	Calls an integration to assist in personal details related requests: • Update email address • Update address • Update phone number • Update blood type • Update date of birth
HCM feedback retriever AI agent	Calls an integration subflow to assist the employee in getting the feedback that they have received in HCM from their managers.
Expense manager AI agent	Fetches expense details to create and submit and expense report.
View paychecks AI agent	Retrieves paycheck information for the selected period.
Record field value prediction AI agent	Predicts the HR service of an incoming case. It can also provide a summary and justification of prediction.
HR Case Transfer AI Agent	Automatically transfers the case to the predicted service.
HR search and notify AI agent	Performs search to find relevant HR knowledge articles and catalog items related to the given query and raise notification if relevant information is found.
HR criticality detection AI agent	Performs criticality detection on an HR case and acts based on the criticality level.

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Available HCM agents for HR Service Delivery AI agent collection (continued)

Available AI Agent	Description
HR Case Planner AI Agent	Creates an ordered step-wise fulfillment/execution plan for an HR case based on specific COE or HR service.
Next action recommended AI agent	Identifies the optimal steps for resolving tasks by referencing similar case details, reviewing relevant knowledge articles and web search results. It summarizes and presents to the user a step-by-step summarized resolution plan and derived action plan. Implements the feedback flow only when asked for it.

Important: All agentic workflow and AI agent records are read-only by default.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then do the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

For more information about duplicating an agentic workflow, implementing access control lists and activating the required components, see the following topics:

- Duplicate an agentic workflow
- Activate an agentic workflow template
- Modify an AI agent

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

Important: Some Now Assist skills, agents, and agentic workflows are turned on by default. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Help resolve tuition requests agentic workflow for Now Assist for HRSD

The Help resolve tuition requests agentic workflow evaluates employee-submitted course information against company tuition policies found in knowledge articles to help employees understand whether their proposed course meets reimbursement requirements and directs them through the pre-approval flow.

Help resolve tuition requests overview

The Help resolve tuition requests agentic workflow streamlines the tuition pre-approval process by evaluating the course information an employee submits against company policies found in knowledge articles.

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Note: This agentic workflow is designed for employees to receive pre-approval before enrolling in a course. The Help resolve tuition requests agentic workflow helps employees request reimbursement for pre-approved and completed courses.

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Help resolve tuition requests**.

   The Define key requirements workflow is displayed. For more information, see Help resolve tuition requests AI agents.
3. Select **Add a preferred trigger** to review the trigger factors for this agentic workflow. For more information, see Triggers for the Help resolve tuition requests agentic workflow.
4. The **Select a UI display** option enables the Now Assist panel. For more information, see Select display.

Help resolve tuition requests AI agents

The following table lists the agents that are part of the Help resolve tuition requests agentic workflow.

AI agents in the Help resolve tuition requests agentic workflow

AI agent	Description
Tuition reimbursement policy based HR case evaluation AI agent	Evaluates the HR case details against the company policy.
Tuition reimbursement case closure AI agent	Adds work notes with the resolution steps taken and moves the case to awaiting approval/close complete.
Tuition reimbursement preapproval task generation AI agent	Checks if the manager has approved a pre-approval request or creates a new pre-approval request.

Triggers for the Help resolve tuition requests agentic workflow

In the Help resolve tuition requests workflow, the agentic workflow begins executing when the case is assigned and in the Ready or WIP state.

Triggers for Help resolve tuition requests agentic workflow

Trigger	Description
Manager approves/rejects tuition reimbursement pre-approval case	The workflow is triggered when the employee's manager approves or rejects the pre-approval request for tuition reimbursement.
Tuition Reimbursement Pre-Approval Case Created/ Updated	The workflow is triggered when the case is created (employee submits the request) or when the case is updated.

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Select display

In the **Select a UI display** workflow, you can enable the Now Assist panel display, which sends notifications to HR agents for the triggered case. When the Now Assist panel option is enabled, the AI agent output or notifications are displayed in the Now Assist panel.

Select this option to receive and review notifications by AI agents in the Now Assist panel. AI agents notify HR agents in the Now Assist panel with the case resolution and summarization notes.

Related topics

- Now Assist AI agents
- Install Now Assist AI agents
- AI Agent Studio

Help resolve tuition reimbursement requests agentic workflow

The Help resolve tuition reimbursement requests agentic workflow streamlines the reimbursement process by evaluating employee course reimbursement submissions against company policies and returning a decision of approval, denial, or request for additional information.

Help resolve tuition reimbursement requests overview

The Help Resolve Tuition Reimbursement Requests agentic workflow automates the evaluation of employee tuition reimbursement submissions using the Policy-based HR evaluator skill to compare course information provided through the Employee Center against company policies documented in knowledge articles. For each request, the workflow collects the submitted course details, analyzes them against policy requirements, and returns a case analysis with one of three decisions: approval if the request meets all policy requirements, denial with explanation if requirements are not met, or a request for additional information if the submission is incomplete.

> **Note:** This agentic workflow is designed for reimbursement requests for courses that were pre-approved and completed. The Help resolve tuition requests agentic workflow helps employees evaluate whether a course meets company requirements before the employee enrolls.

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Help resolve tuition reimbursement requests**.

   The Define key requirements workflow is displayed. For more information, see Help resolve tuition reimbursement requests AI agents.
3. The **Select a UI display** option enables the Now Assist panel. For more information, see Select display.
4. Enable the business rule that triggers the agentic workflow. For more information, see Triggers for the Help resolve tuition reimbursement requests agentic workflow

Help resolve tuition reimbursement requests AI agents

The following table lists the agents that are part of the agentic workflow.

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AI agents in the Help resolve tuition reimbursement requests agentic workflow

AI agent	Description
Tuition reimbursement request evaluator AI agent	Evaluates the HR case details against the company policies described in knowledge articles.
Tuition reimbursement request closure AI agent	Adds work notes with the resolution steps taken and moves the case to awaiting approval/close complete.

Select display

In the **Select a UI display** workflow, you can enable the Now Assist panel display, which sends notifications to HR agents for the triggered case. When the Now Assist panel option is enabled, the AI agent output or notifications are displayed in the Now Assist panel.

Select this option to receive and review notifications by AI agents in the Now Assist panel. AI agents notify HR agents in the Now Assist panel with the case resolution and summarization notes.

Triggers for the Help resolve tuition reimbursement requests agentic workflow

In the Help resolve tuition reimbursement requests workflow, the agentic workflow begins executing when the case is assigned and in the Ready or Work in progress state. The agentic workflow utilizes system business rules instead of agentic triggers. To enable the business rule, do the following steps:

1. Navigate to **System definition** > **Business Rules**.
2. Locate and open **TR Case Created or Updated**.
3. Select the **Active** option to enable the business rule.

Predict service and transfer HR cases agentic workflow

Analyze an HR case and automatically route it to the most appropriate HR service with the predict service and transfer HR cases agentic workflow. Optimize HR Case Management, ensuring that cases are handled by the most appropriate teams.

Overview of Predict service and transfer HR cases agentic workflow

The agents, tools, and triggers that are associated with the Predict service and transfer HR cases agentic workflow are provided by Now Assist applications. You can activate the agentic workflow template by making triggers active. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Prerequisites and setup

You must have HRSD Pro plus for Now Assist installed for the HR Service Delivery AI Agent Collection. When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Perform the following steps after you Configure Group Action Framework.

1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. Run **HR service GAF grouping job** with an admin role. This generates **GAF - Run Offline Flow** in the Global scope.
3. Run **GAF - Run Offline Flow** and monitor its progress.

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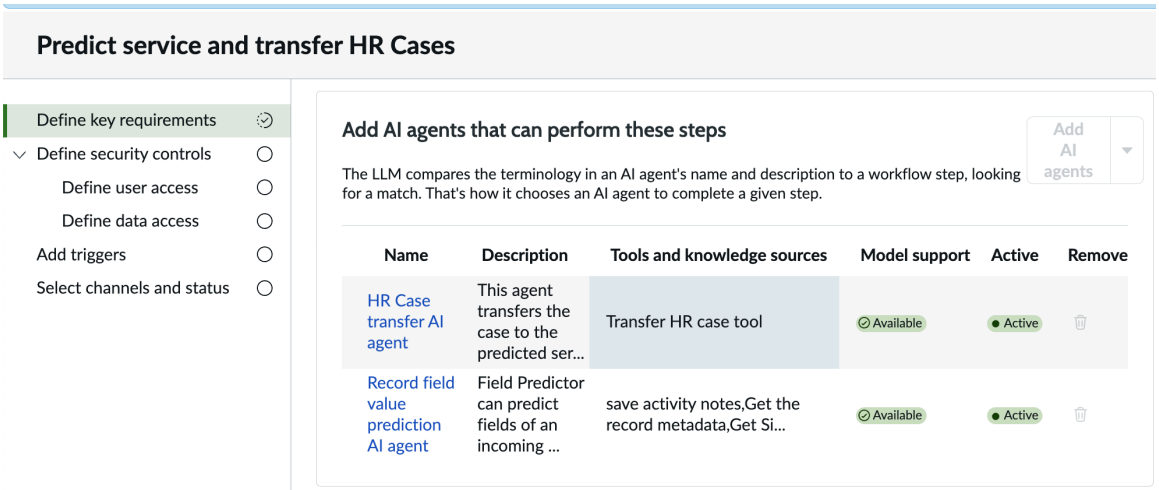
Accessing the Predict service and transfer HR cases agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Predict service and transfer HR cases agentic workflow**.



The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, agent instructions/prompts, and tools. Tools are displayed in the second step of the AI agent-guided setup, Add tools, and information.

Predict service and transfer HR cases agentic workflow AI agents

The following table lists the agents that are used in the Predict service and transfer HR cases agentic workflow.

Important: In the Define availability screen for the AI agent, make sure that the Status toggle is enabled to activate the AI agent.

Agents used in the Predict service and transfer HR cases agentic workflow

AI agent	AI agent role
Record field value prediction AI agent	Predicts the HR service of an incoming case. It can also provide a summary and justification of prediction.
HR Case Transfer AI Agent	Automatically transfers the case to the predicted service.

Triggers

Activate triggers according to your organization's requirements, and enable/disable the required COEs.

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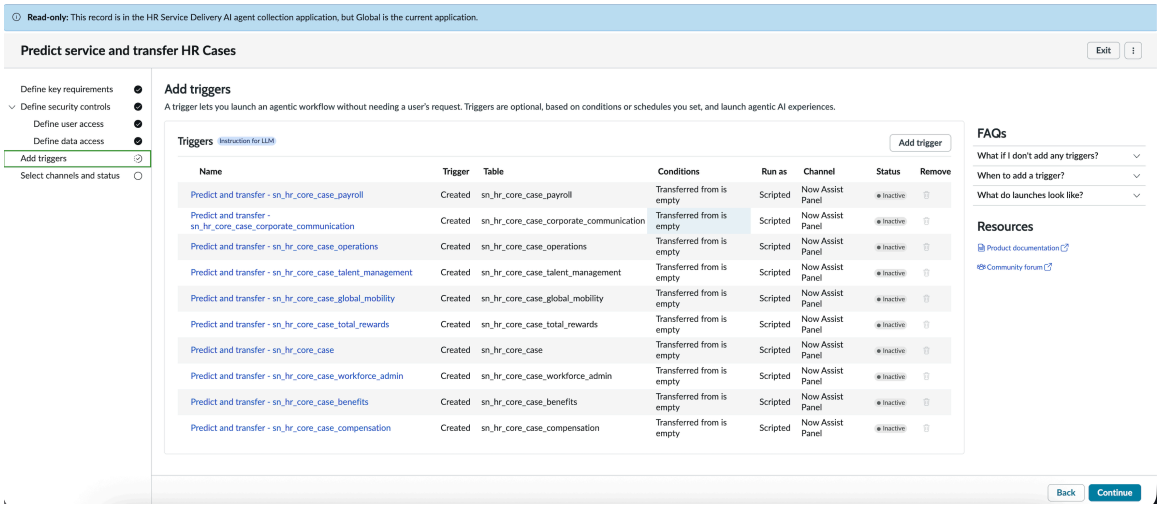
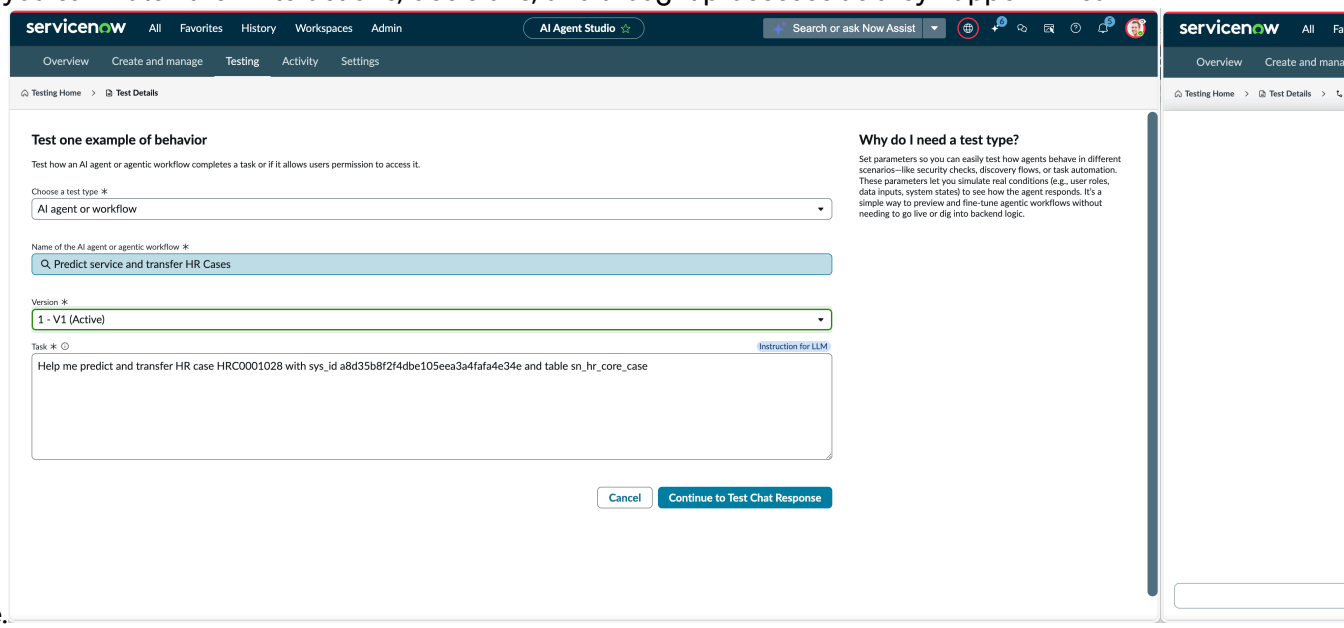


In the Predict service and transfer HR cases agentic workflow, review the information in the Describe and connect section, make the necessary updates to ensure the agentic workflow adapts to your requirements, and then select **Save and Continue**.

Executing a test scenario

You can run this workflow on the Testing page of AI Agent Studio with the following utterance in the Task field: "Help me predict and transfer HR case with number "HRC000XXX" with "sys_id " and table "sn_hr_core_case".

The AI agent decision log displays the AI agents that are working to predict and transfer the case, and you can watch their interactions, decisions, and thought processes as they happen in real time.



Prediction and transfer results on Agent Workspace for HR Case Management

This is an example of how the Predict service and transfer HR cases agentic workflow automatically identifies the appropriate HR service for a case, and transfers the case to the identified service.

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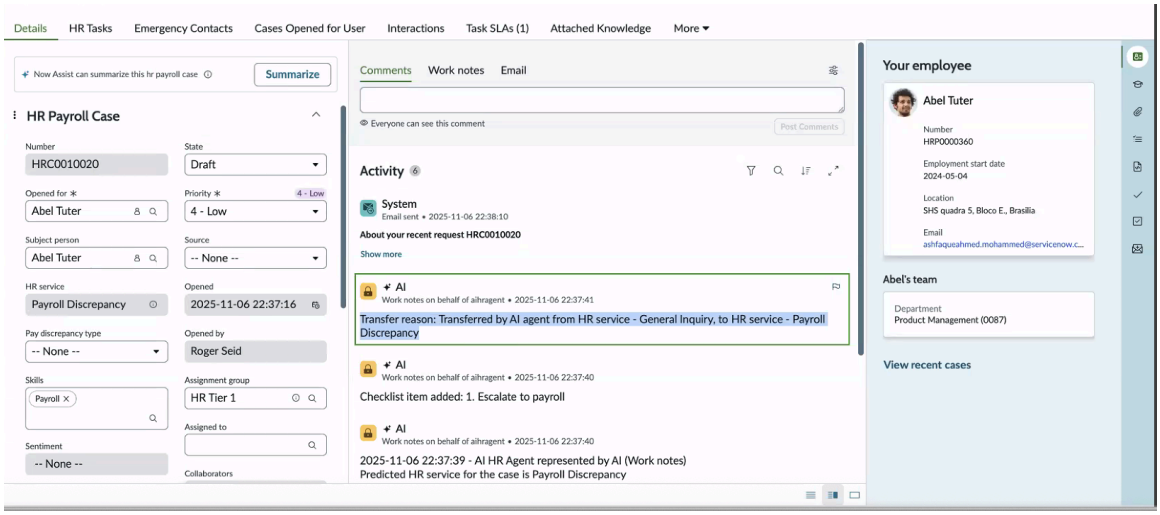

Resolve noncritical HR cases agentic workflow

Use the Resolve noncritical HR cases agentic workflow to assess the criticality of HR cases and automatically respond to noncritical inquiries without human intervention. Human agents must intervene when requests are marked critical.

Resolve noncritical HR cases agentic workflow overview

The Resolve noncritical HR cases agentic workflow can evaluate HR requests submitted by employees of both critical and non-critical nature. The workflow:

- checks criticality
- generates recommendations for a non-critical request fulfillment
- requests for a human agent intervention when a case is identified as critical

The agents, tools, and triggers that are associated with the Resolve HR cases agentic workflow are provided by Now Assist applications. You can activate the agentic workflow template by making triggers active. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Prerequisites and setup

You must have HRSD Pro plus for Now Assist installed for the HR Service Delivery AI Agent Collection. When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Accessing the Resolve noncritical HR cases agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Resolve noncritical HR cases**.

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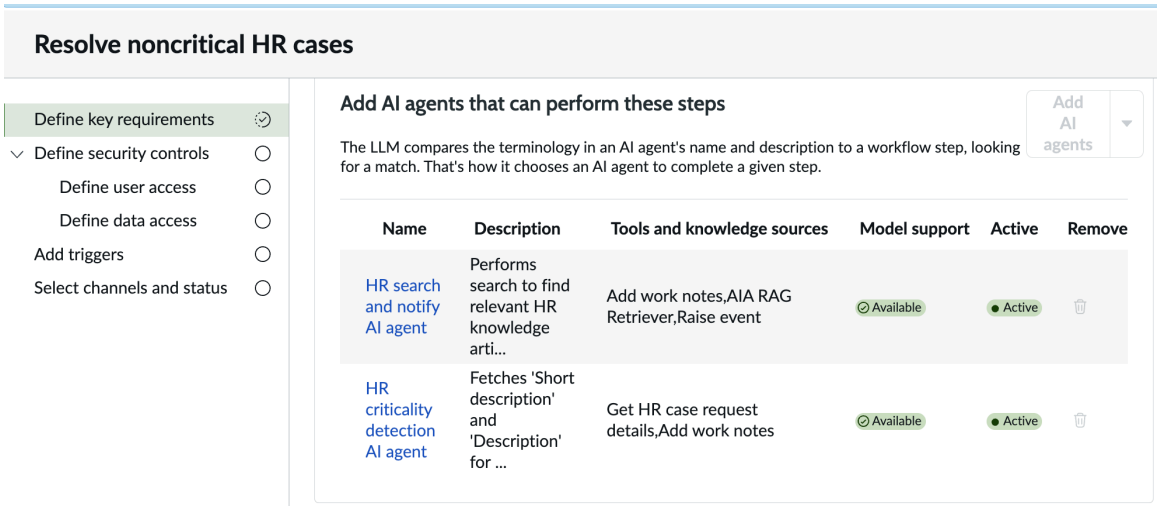

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools, and information.

Resolve noncritical HR cases agentic AI agents

The following table lists the agents that are used in the Resolve noncritical HR cases agentic workflow.

Important: In the Define availability screen for the AI agent, make sure that the Status toggle is enabled to activate the AI agent.

Agents used in the Resolve noncritical HR cases agentic workflow

AI agent	AI agent role
HR search and notify AI agent	Performs search to find relevant HR knowledge articles and catalog items related to the given query and raise notification if relevant information is found.
HR criticality detection AI agent	Performs criticality detection on an HR case and acts based on the criticality level.

In the Resolve noncritical HR cases agentic workflow, review the information in the Describe and connect section, make the necessary updates to ensure the agentic workflow adapts to your requirements, and then select **Save and Continue**.

Trigger

Business rule: The **Trigger non critical use case** business rule serves as a trigger that executes following the completion of the Predict service and Transfer HR cases use case. This business rule contains conditions that determine when the Resolve noncritical HR cases use case

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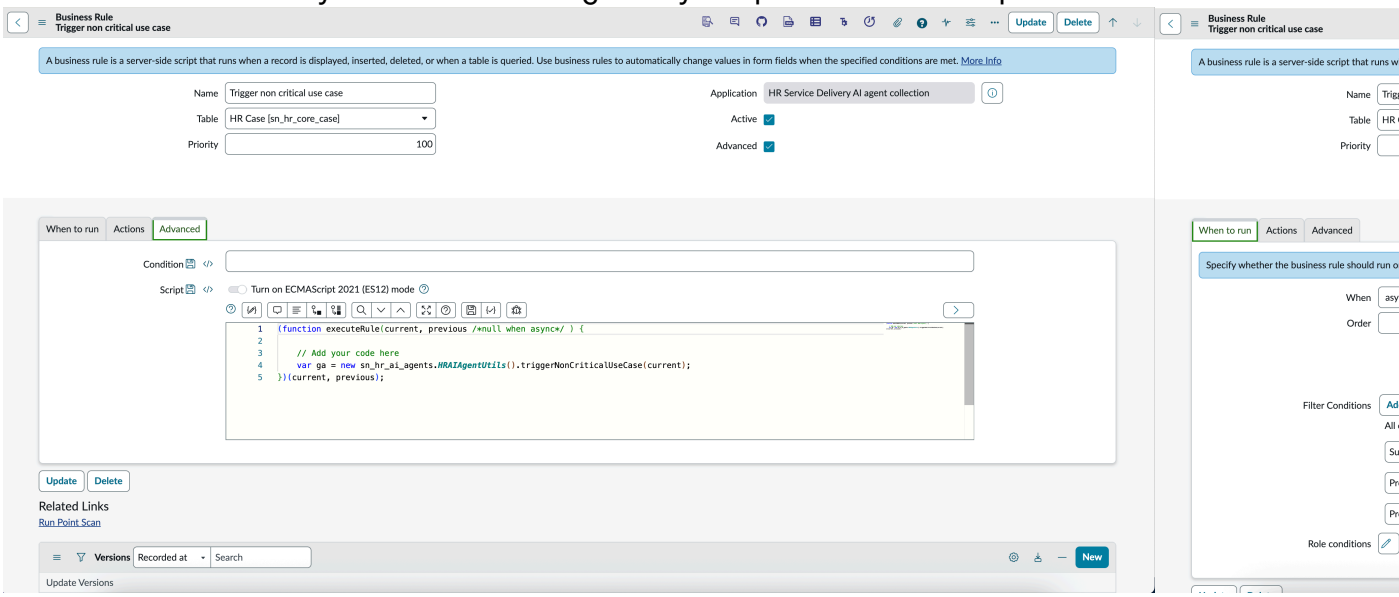
should be initiated. Modify the conditions to align with your specific business requirements.



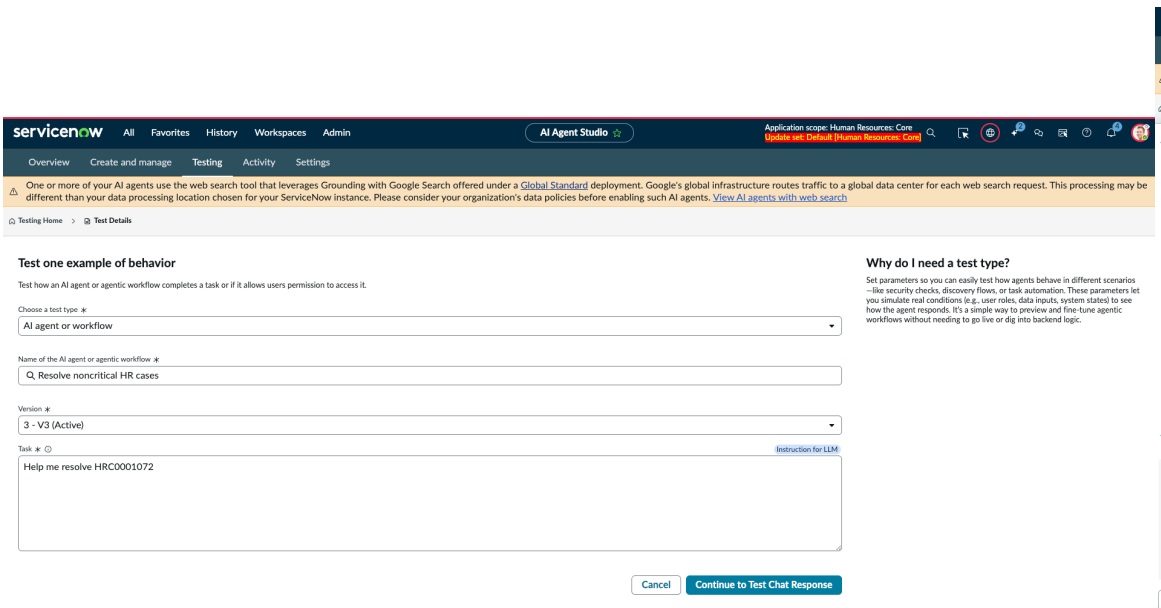
Executing a test scenario

You can run this workflow on the Testing page of AI Agent Studio with the following utterance in the Task field:

"Resolve HRC000XXX"

The AI agent decision log displays the AI agents that are working to resolve the case, and you can watch their interactions, decisions, and thought processes as they happen in real time.

> **Note:** The AI agent decision log is available in the **Testing** section in AI Agent Studio and is intended for testing purposes only.



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The AI agent assesses each HR case to determine its criticality.

- For non-critical cases, it retrieves and recommends relevant articles, then notifies the employee via Now Assist Virtual Agent or email. Employee can review the recommendations, provide feedback, or close the case.
- For critical cases, Human agents intervention is requested.

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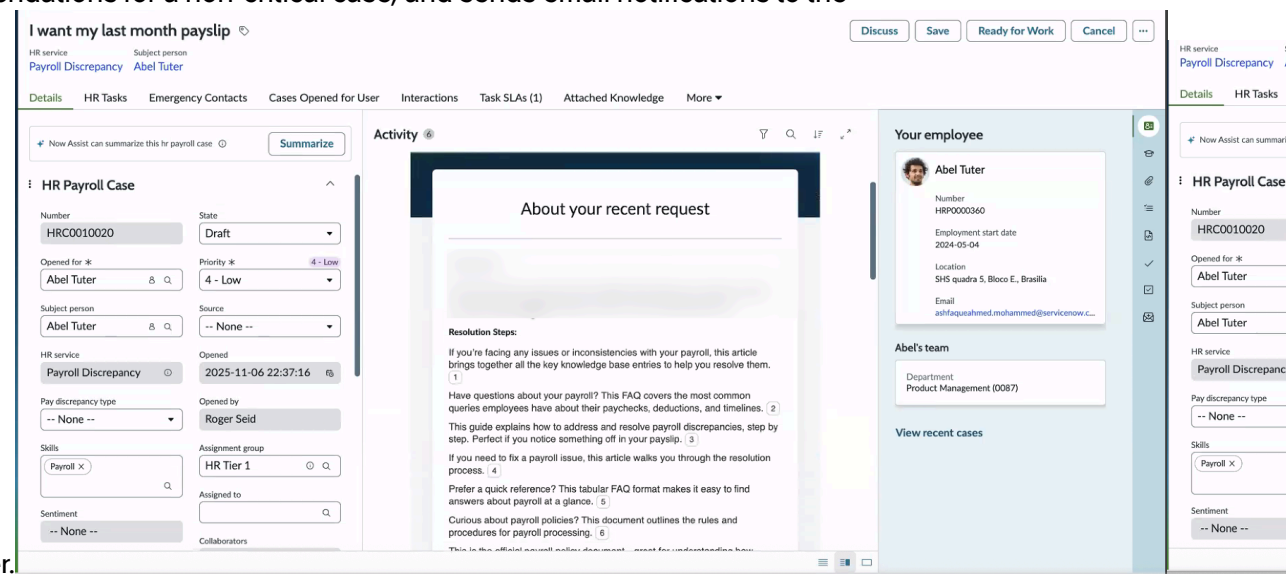
Example of event creation on Agent Workspace for HR Case Management

This is an example of how the Resolve noncritical HR cases agentic workflow generates recommendations for a non-critical case, and sends email notifications to the requester.



Resolve critical HR case agentic workflow

Resolve critical HR requests efficiently with the Resolve critical HR case agentic workflow. This workflow generates a tailored fulfillment plan for an HR case using fulfillment instructions, KB articles, or resolution notes of similar past cases. It helps accelerate the resolution process by providing planning support to HR agents.

Resolve critical HR case agentic workflow overview

The agents, tools, and triggers that are associated with the Resolve critical HR case agentic workflow are provided by Now Assist applications. You can activate the agentic workflow template by making triggers active and setting the display settings to include the Now Assist panel. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Prerequisites and setup

You must have HRSD Pro plus for Now Assist installed for the HR Service Delivery AI Agent Collection. When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Perform the following steps after you Configure Group Action Framework.

1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. Run **HR service GAF grouping job** with an admin role. This generates **GAF - Run Offline Flow** in the Global scope.
3. Run **GAF - Run Offline Flow** and monitor its progress.

Accessing the Resolve critical HR case agentic workflow

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Resolve critical HR case**.

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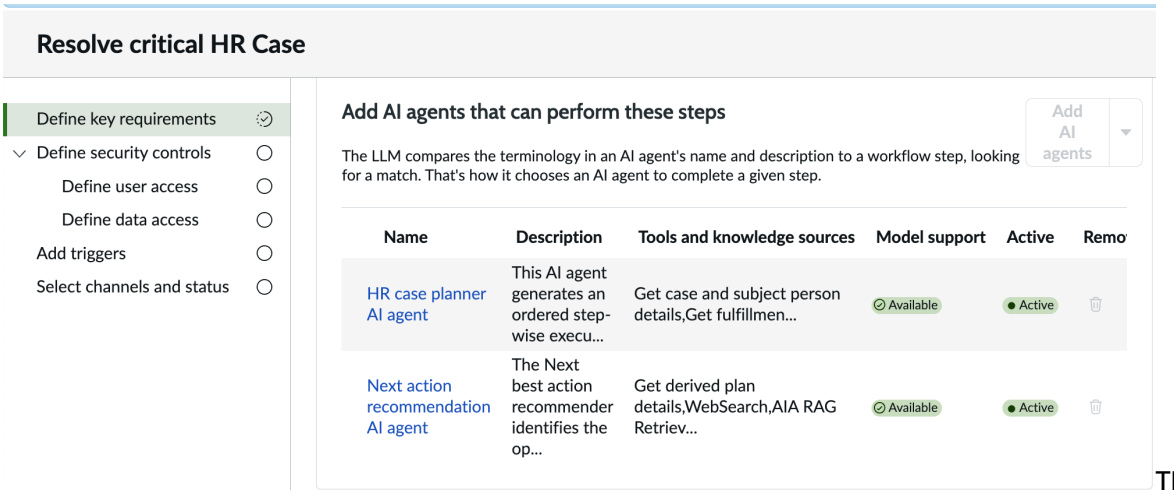

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, list of steps, and tools. Tools are displayed in the second step of the AI agent guided setup, Add tools and information.

Resolve critical HR case AI agents

The following table lists the agents that are used in the Resolve noncritical HR cases agentic workflow.

Important: In the Define availability screen for the AI agent, make sure that the Status toggle is enabled to activate the AI agent.

Agents used in the Resolve critical HR case agentic workflow

AI agent	AI agent role
HR Case Planner AI Agent	Creates an ordered step-wise fulfillment/execution plan for an HR case based on specific COE or HR service. **Note:** This AI agent is invoked when fulfillment instructions are present for an HR case.
Next action recommended AI agent	Identifies the optimal steps for resolving tasks by referencing similar case details, reviewing relevant knowledge articles and web search results. It summarizes and presents to the user a step-by-step summarized resolution plan and derived action plan. Implements the feedback flow only when asked for it. **Note:** This AI agent is invoked when fulfillment instructions aren't present for a case.

In the Resolve HR cases agentic workflow, review the information in the Describe and connect section, make the necessary updates to confirm the agentic workflow adapts to your requirements, and then select **Save and Continue**.

Trigger

UI action: To make Generate plan available to users on the HR case form in UI16 and Agent Workspace for HR Case Management, you must activate the UI action. When activated, a button appears that says **Generate Plan** when users are looking at active records on the HR case table.

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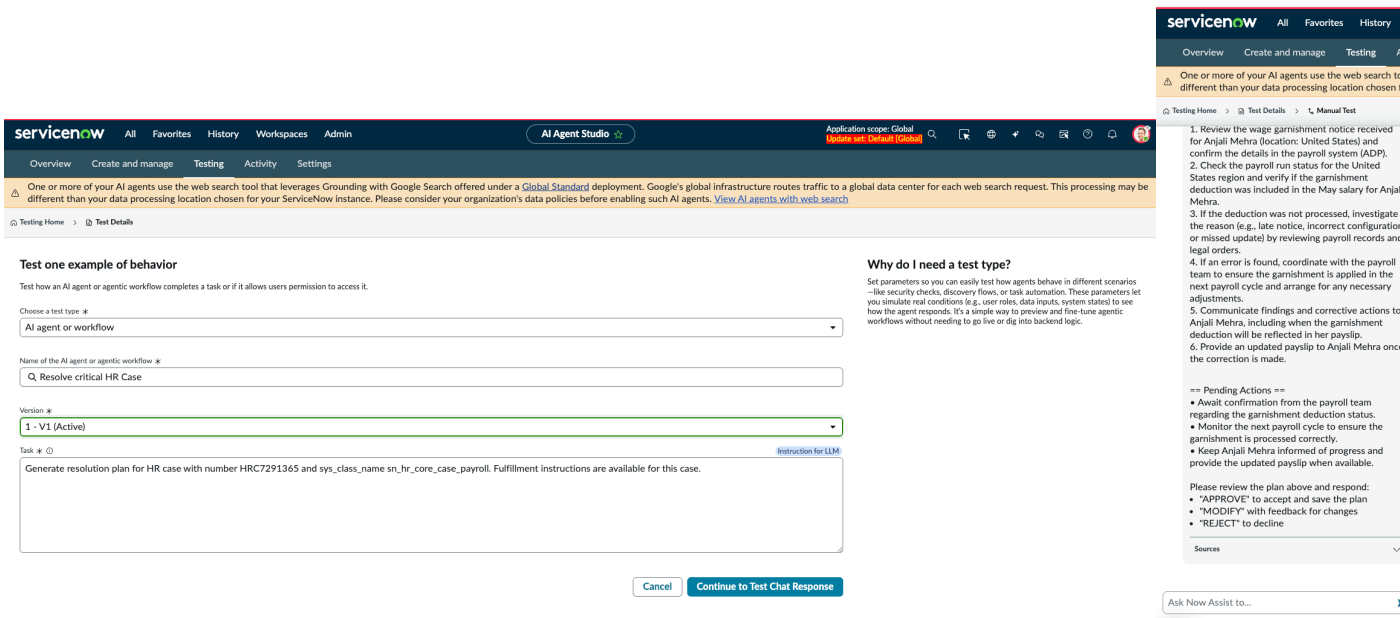
1. Navigate to **All** > **System UI** > **UI actions**.
2. Search in the Name field for **Generate plan**.
3. Open the record.
4. Set Active to true.
5. Save or update the record.

Executing a test scenario

After the workflow has been activated in AI Agent Studio, you can run this workflow on the Testing page of AI Agent Studio with the following utterance Plan in the in the Task field: HRC000XXX.

The AI agent decision log displays the AI agents that are working to resolve the case, and you can watch their interactions, decisions, and thought processes as they happen in real time.

Note: The AI agent decision log is available in the **Testing** section in AI Agent Studio and is intended for testing purposes only.



The AI agent creates fulfillment plans by analyzing HR case details, employee information (location and designation), relevant KB articles, fulfillment instructions, and resolution notes from similar cases. HR agents can refine the plan through prompts before approving it. Approved plans are automatically added to the case work notes.

Note: The option to generate a resolution plan appears only:

- For the HR service of Fulfillment type: **Manual**. It does not appear for the Employee Relations and Life Cycle Events cases.
- When a case is move to Ready state.

Generating a resolution plan for an HR case

For more information, see Generate a fulfillment plan

Generate a fulfillment plan

Auto-generate a fulfillment/execution plan for a case. Accelerate the resolution process by providing planning support to HR agents.

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Before you begin

Role required: sn_hr_core.case_writer, now_assist_panel_user

You can generate a case fulfillment plan from either Core UI or Agent Workspace for HR Case Management.

Procedure

1. Navigate to **Workspaces** > **HR Agent Workspace**.

   Alternatively, you can navigate to **All** > **HR Case Management** > **All HR Cases**.

2. Open an HR case that is assigned to you.
3. Select **Generate plan**.

   Note: This option appears only for the HR service of Fulfillment type: **Manual**. It does not appear for the Employee Relations and Life Cycle Events cases.

   The AI agent creates a fulfillment plan for a given HR case by fetching HR case details, employee details such as location and designation, relevant KB articles, and case fulfillment instructions, and resolution notes of similar past cases.

4. Choose one of the following options:
   - Type **Accept** to publish the AI-generated fulfillment plan to the work notes of the case.
   - Type **Edit** to interactively revise the AI-generated fulfillment plan through a conversational interface.
   - Type **Dismiss** to discard the AI-generated fulfillment plan.

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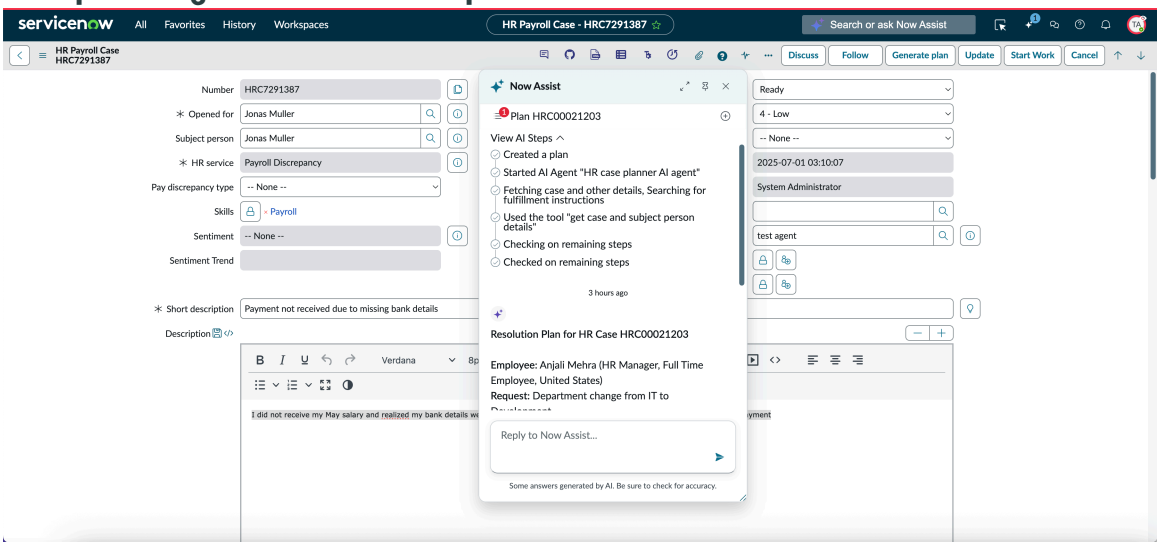
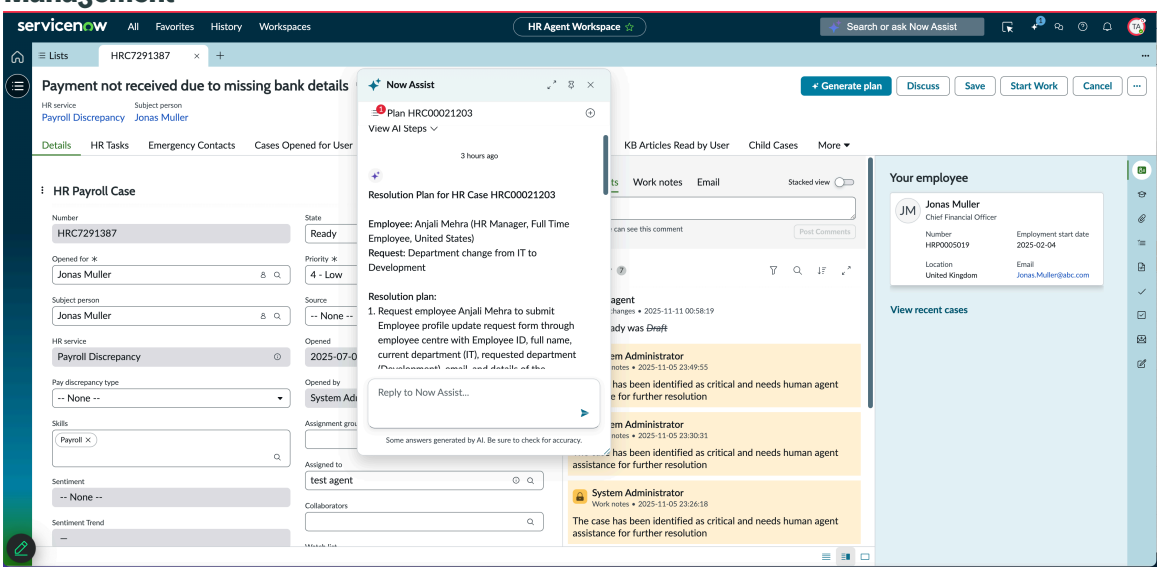
Example of AI-generated fulfillment plan on Core UI



Example of AI-generated fulfillment plan on Agent Workspace for HR Case Management



Generate onboarding ramp-up plan agentic workflow

The Generate onboarding ramp-up plan agentic workflow is an AI-powered solution that helps managers at your organization onboard new employees more efficiently. This workflow uses a team of AI agents to generate team specific and personalized plans for every new hire.

The Generate onboarding ramp-up plan agentic workflow facilitates the employee journey that transpires from the preboarding phase to the onboarding phase. As newly hired employees transition from preboarding to onboarding, managers are typically responsible for producing onboarding plans that ramp up the knowledge and skill of new employees joining their team. Creating onboarding plans, especially personalized, team-specific plans, is a time-consuming process for managers that quickly devolves into an increased burden. Moreover, if the ramp-up plans aren't beneficial in developing the knowledge and skill of new employees coming onboard, managers are often required to spend more time on training the talent that they recently acquired. This agentic workflow for generating onboarding ramp-up plans significantly reduces the workload for managers by converting a cumbersome process into an automated workflow.

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The Generate onboarding ramp-up plan agentic workflow provides the following benefits to help deliver value to your organization:

- Automates onboarding plan creation by eliminating the need for managers to design individualized plans manually.
- Generates team-specific and role-specific onboarding plans tailored to new hires.
- Minimizes the administrative efforts required from managers during onboarding.
- Ensures that onboarding plans are standardized while still accommodating team differences.
- Speeds up the process of preparing new hires for their roles.
- Focuses on structured knowledge and skill acquisition for new hires from the start.

AI agents

When the Generate onboarding ramp-up plan agentic workflow is triggered, a team of AI agents run autonomously to produce a ramp-up plan tailor-made for the onboarding employee.

This workflow employs AI agents to perform the following functions:

- Collect data on the employee, their onboarding journey, and the assigned team.
- Analyze required role-specific skills from the job description and interview notes, and compare them with the employee's existing skills from their resume.
- Recommend targeted learning courses to address identified skill gaps.
- Generate a personalized ramp-up plan for the new hire.
- Provide an interactive review process, enabling managers to modify the plan as needed.
- Deliver personalized guidance through an assistant-like interface.

AI agents associated with Generate onboarding ramp-up plan agentic workflow

AI agent	AI agent role
Ramp up plan generation AI agent	This AI agent automates the creation of the personalized onboarding ramp-up plan for new employees. It performs the following functions: **Data collection** • Gathers information from the onboarding journey, HR cases, team plans, user and manager profiles, job details, and learning resources. • Extracts employee skills and identifies skill gaps using job descriptions, interview notes, and resumes. • Retrieves relevant learning courses aligned with identified skill gaps and role requirements. **Onboarding plan generation**

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AI agents associated with Generate onboarding ramp-up plan agentic workflow (continued)

AI agent	AI agent role

	• Uses the employee's start date, manager details, and learning recommendations to build a structured onboarding plan.
	• Organizes the plan into up to four stages:
	  ○ **Stage 1:** Relevant for Your Role
	  ○ **Stage 2:** Popular on Your Team
	  ○ **Stage 3:** Trending Courses
	  ○ **Stage 4:** Get to Know Your Team
	
	Content creation and task management
	
	• Includes up to five learning courses per stage (Stages 1–3).
	• Skips any stage without available courses.
	• Stage 4 always appears and contains:
	  ○ Three core team-related tasks.
	  ○ Up to six additional 1:1 meeting tasks with teammates.
	  ○ A maximum of nine tasks in total.
	
	Scheduling and delivery
	
	• Assigns tasks and learning items to both employee and manager.
	
	• Calculates and assigns due dates for all courses and tasks to ensure timely completion.

Ramp up plan reviewer AI agent	This AI agent allows managers to review the AI-generated personalized onboarding ramp-up plan and update its details through a conversational interface. It provides practical guidance to support managers in making updates in a user-friendly manner. The following are the AI Agent workflow phases:

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AI agents associated with Generate onboarding ramp-up plan agentic workflow (continued)

AI agent	AI agent role
	• **Present plan** - Displays the initial ramp-up plan using employee and journey details. • **Collect Input** – Accept manager instructions to create, update, or delete tasks and stages, confirming all changes. • **Review** – Redisplay the updated plan and check if further changes are needed. • **Exit** – End the session.

Plugins required for optimum output

To achieve optimum output of the Generate Onboarding ramp-up plan agent, the following plugins are essential. Installing the recommended plugins helps maximize efficiency and overall output quality.

- Now Assist for HR Service Delivery (sn_hr_gen_ai)
- Skills Foundation (sn_skills_int)
- Learning (sn_lep)
- Hiring Core (sn_ta_hiring_core)
- Journey Designer (sn_jny)

Set Onboarding ramp up trigger to use Employee Center portal

Set Onboarding ramp-up trigger to use Employee Center portal in the trigger configuration so the onboarding ramp-up plan workflow is accessible through the portal. Without setting the portal, the trigger will not be visible or usable in the Employee Center portal.

Before you begin

Role required: admin

Procedure

1. In the **Filter navigator** enter `sn_aia_trigger_configuration.list`.
2. Select and open **Onboarding ramp-up trigger** from the **AIA Trigger Configurations** list.
3. Select the **Active** check box.

   Note: The **Active** check box is not made available by default. Configure the **Form Layout** from the context menu, and move `Active` from **Available** to **Selected**.

4. Add `Employee Center` to the **Portal** field.

   Note: The **Portal** field is not made available by default. Configure the **Form Layout** from the context menu, and move `Portal` from **Available** to **Selected**.

5. Click **Save**.

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Activate Onboarding ramp-up trigger

Enable the Onboarding ramp-up trigger to ensure that the workflow runs at the right time during the employee onboarding. This automates plan generation, reduces manual setup for managers, and improves consistency in onboarding processes.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio**.
2. Go to **Create and Manage** tab.
3. Select **Generate onboarding ramp-up plan** from the list.
4. Click **Add a preferred trigger**.
5. Select **Onboarding ramp-up trigger** in the **Define trigger** window and duplicate it.
6. Activate the trigger by clicking on the **Active** toggle button.
7. Select `Employee Center` under **Portal**.
8. Click **Save**.

Activate the associated Now Assist skills

Enable the Now Assist skills to allow the system to analyze interview notes and job descriptions, extract keywords, and identify relevant skills. This improves skill gap analysis and ensures accurate, personalized ramp-up plans for new employees.

Before you begin

Role required: admin

Procedure

1. Navigate to **Now Assist Admin** > **Skills**.
2. Select **Employee** > **HRSD**.
3. Activate the following skills:
   - Interview note skill relevance
   - Job description skill relevance
   - Skill keyword extractor
   - Resume skill extraction
   - JNY Relevant Catalog Items

Display AI agent output in Virtual Agent conversations

Use the *`sn_aia.enable_va_conversation`* system property to display output from AI agents that are used in agentic workflows when you converse with Now Assist in Virtual Agent.

Before you begin

Role required: admin [virtual_agent_admin]

Procedure

1. In the **Filter navigator**, enter `sys_properties.list`.
   The System Properties [sys_properties] table appears.

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2. Select **Name** from the drop-down list associated with the **Search** field.
3. In the **Search** field, enter `*sn_aia.enable`.
   A list of system properties associated with Now Assist AI Agents appears.
4. Select the *sn_aia.enable_va_conversation* system property.
5. Set the **Value** field to **True** to enable output from AI agents during the conversations that you have with Now Assist in Virtual Agent.
6. Select **Update**.

Add Employee Center to Now Assist in Virtual Agent

Enable Now Assist in Virtual Agent to appear in the Employee Center so you can converse with AI agents during a process that's facilitated by an agentic workflow.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
   The Assistants page appears.
2. Select **Now Assist in Virtual Agent (default)**.
3. On the navigation panel, select **Display experience**.
   The Choose how to display page appears.
4. In the Portals widget, select **Employee Center** from the **Add portal** drop-down list.
   The Add chat experience dialog box appears.
5. Select the **Allow the search bar to open into a full-page chat experience** check box.
6. Select **Add**.
7. Select **Save and continue**.

Review and edit onboarding ramp-up plans using Now Assist

Managers working for organizations using the Generate onboarding ramp-up plan agentic workflow can use Now Assist in Virtual Agent to review and edit personalized onboarding plans generated by a team of AI agents. Once the manager approves a plan that they reviewed, the corresponding plan is added to the new employee's onboarding journey.

Before you begin

The Now Assist for HR Service Delivery (HRSD) (sn_hr_gen_ai) plugin must be activated.

The Generate onboarding ramp-up plan agentic workflow must be activated and implemented into your organization's case or journey creation process.

The configuration tasks in the following topics must be completed:

- Set Onboarding ramp up trigger to use Employee Center portal.
- Activate Onboarding ramp-up trigger
- Activate the associated Now Assist skills
- Display AI agent output in Virtual Agent conversations
- Add Employee Center to Now Assist in Virtual Agent

To trigger this agentic workflow, the *Trigger onboarding rampup agent* scheduled job runs nightly to search for Journey records associated with a new employee's onboarding journey.

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This scheduled job targets Journey records for new employees who are starting their onboarding journey within five days. Specifically, this scheduled job selects the **Initiate onboarding ai** check box in the Journey record to initiate the agentic workflow when the following conditions are true:

- The **State** field in the Journey record is set to **Ready**.
- The **Journey accelerator plan type** field in the corresponding Journey Configuration record is set to **Agentic AI Onboarding Plan Type**.
- The **Type** field in the corresponding Journey Configuration record is set to **Blank** or **Onboarding**.
- The date in the **Employment start date** field in the HR profile record of the onboarding employee is equal to or greater than the system date by up to the number of days specified in the *sn_jny.agent_conversation_head_start_days* property. The default number of days specified in the *sn_jny.agent_conversation_head_start_days* property is five.

Role required: manager

About this task

A manager receives a notification from Now Assist in Virtual Agent after they access the Employee Center. The manager is prompted to review the ramp-up plan for a new employee who is onboarding in five days.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   A notification from Now Assist in Virtual Agent appears.
2. Select the Now Assist icon.
   Now Assist in Virtual Agent outputs a message that includes the following information:
   - Name of the new employee
   - Their start date
   - The stages and tasks it generated to help the employee ramp up for their role
   - A link to a draft of the onboarding plan
3. Select the link provided by Now Assist in Virtual Agent to view the onboarding plan.
   The Journey details page appears with the stages created by the AI agent.
4. **Optional:** Converse with Now Assist in Virtual Agent to convey the changes you want made to the ramp-up plan.

Option	Description
Create a stage	Tell Now Assist in Virtual Agent to add a stage with a title of your choice. You can also add courses or tasks to the stage you're creating in a single request. For example, type `Create a stage named Data Science` to create a stage ti tled, "Data Science."
Delete a stage	Tell Now Assist in Virtual Agent to delete a stage that you want removed from the ramp-up plan. Deleting a stage also deletes the courses or tasks that are nested in that stage.

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Option	Description
Add a course or task	Tell Now Assist in Virtual Agent to add a course or task to an existing or new stage. For example, type `Add a task named "Knowledge transfer from Adam Clark" to the Data Science stage` to add a task to the new hire's on boarding journey that appears in the Data Science stage.
Delete a course or task	Tell Now Assist in Virtual Agent to delete a course or task that you want removed from a stage in the ramp-up plan.
Create a one-on-one meeting	Tell Now Assist in Virtual Agent to create a one-on-one meeting for the new hire with the employee you specify. For example, type `Add 1:1 meeting with Abel Tuter` to schedule a one-on-one meeting between the new hire and Abel Tuter as part of the ramp-up plan.
Delete a one-on-one meeting	Tell Now Assist in Virtual Agent to delete a one-on-one meeting that you want removed from the ramp-up plan. For example, type `Delete 1:1 meeting with Abel Tuter` to remove a scheduled one-on-one meeting between the new hire and Abel Tuter from the ramp-up plan.
Update a field in the Journey Accelerator Plan record	Tell Now Assist in Virtual Agent to update a field in the Journey Accelerator Plan record to a value that you specify.
Create a task	Tell Now Assist in Virtual Agent to create a task in the Journey Accelerator Plan record. The tasks types available are: ○ Learning task ○ Catalog item ○ Order guide ○ General To Dos ○ Schedule a meeting

Now Assist in Virtual Agent provides a link to refresh the ramp-up plan with the changes you conveyed.

5. **Optional:** Select the link provided by Now Assist in Virtual Agent to refresh the ramp-up plan with the changes you conveyed.
   The Journey details page is refreshed and reflects the changes you conveyed to the AI agent.
6. Use Now Assist in Virtual Agent to convey that no further changes are needed after you're satisfied with the ramp-up plan you have reviewed.

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What to do next

You must publish the stages in the ramp-up plan that were added to the employee's onboarding journey. After you publish the stages that were added, the employee can view and complete the courses and tasks nested in the added stages.

Schedule interviews agentic workflow

Use the schedule interviews agentic workflow to collect necessary inputs from recruiters or recruitment coordinators and schedule interviews seamlessly from the Now Assist panel.

Schedule interviews agentic workflow overview

Use the schedule interviews agentic workflow to automate the interview scheduling process. This agentic workflow manages all tasks, including gathering inputs to understand the context, finding overlapping slots, drafting personalized messages, and creating and sending invites. The agentic workflow also creates interview records to verify that everything is easily trackable.

To be able to use the agentic workflow, you must do the following:

- In the HR Talent AI Agent Collection plugin, update the status of the ExchangeCalendarUtil restricted caller access (RCA) record from Requested to Allowed. This update grants access to the Outlook API calls.

  Note: This update is only applicable if the Microsoft Outlook integration is available in your instance.

- For panel interviews, the sn_talent_aia.common_slot_threshold property defines the confidence level for common slot identification. This value is set to 80 by default and can be updated as required.

To access the agentic workflow to review or customize it as an admin:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Schedule interviews**.

To access the agentic workflow as a recruiter or recruitment coordinator, initiate it from the Now Assist panel.

Schedule interviews AI agents

The following table lists the agent that is part of the schedule interviews agentic workflow.

AI agent and its role in scheduling interviews

AI Agent	Role
Interview schedule AI agent	Gathers input from the recruiter or recruitment coordinator to obtain the necessary details for scheduling interviews and then identifies the best time slot options for interviews. It uses a combination of attendees' declared scheduling preferences and available calendar time slots to present a prioritized order of time slots that reduce the likelihood of rescheduling. When beneficial, it recommends the self-scheduling option, which presents applicants with panelist-compatible time slots sorted by confidence level, allowing them to select their preferred time. Next, it drafts personalized email content for applicants to include in the interview invite. Users can choose to start from a preconfigured template or use AI to generate the content. Finally, it creates and shares invites by compiling the confirmed

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AI agent and its role in scheduling interviews (continued)

AI Agent	Role
	information from the previous steps, and completes the scheduling process by creating an interview record to ensure trackability.

Use AI agents to create job requisition

Use an AI agent to help hiring managers to create requisitions more efficiently and accurately on the first attempt by providing the necessary guidance through the agentic workflow.

The AI agent is in read-only mode and Active status by default. The following configurations must be done to make the agent discoverable in the Virtual Agent chat window:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **Agents**.
2. Select the agent and navigate to the Define Availability section.
3. In the Select display section, turn on the **Display** option.
4. In the **Assistants where AI agents are discoverable** field, select the assistant that is set up for Employee Center and is active.

The following should be considered when using the AI agent to create a job requisition:

- The job requisition creation using AI agent is only supported from the Virtual Agent chat window and not from the Now Assist panel.
- Two restricted caller access records (RCAs) are available in the HR Talent AI Agent Collection plugin in Requested status by default. The status of these RCAs must be updated to Allowed to grant read access to the AI agent, enabling it to fetch data from the Employee Profile & Education and Training tables.
- A base template is available by default for creating a job description. To create an organization-specific job description template, a template must be created in the Templates table. The sys_id value in *sn_talent_aia.job_description_template* must be replaced with the sys_id of the new template.
- The sn_talent_aia.catalog_question_displayValue property specifies the sys_id of the payload record in the sn_talent_aia_payload table. The payload record contains the catalog questions in a readable format. If the catalog questions must be customized, the default value of this property must be updated to the sys_id of the new payload record containing the customized questions.

AI agent and its role in creating job requisition

AI Agent	Role
Job requisition creation AI agent	Gathers essential information from the hiring manager to understand the role and create a requisition, leveraging past requisitions or matching candidate profiles to pre-fill fields. It also asks the hiring manager if they want to consider hiring someone with similar skills to an existing candidate. If so, it fetches and pre-fills relevant details while requesting any missing information. Additionally, it supports job description creation by offering the hiring manager options to reuse an existing description, use a preconfigured template, or draft a new job description.

HR AI voice agents

Employees use HR Voice AI agents to perform HR-related tasks such as creating new cases, checking case status, and requesting time off, through real-time voice interactions.

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HR AI voice agents utilize generative AI to deliver natural, dynamic conversations that help employees complete HR-related tasks, resolve issues, and access HR information—anytime, anywhere. They are built on the ServiceNow AI Platform and delivered via the HR AI Voice agent plugin, allowing for customization to meet specific HR business needs.

HR AI Voice agents are managed through the AI Agent Studio, which provides tools for creating, deploying, and monitoring these agents. Each agent is associated with a voice service acting as a virtual HR help desk and can be configured with welcome messages, voice profiles, and fallback options like live agent routing or ticket creation. This setup enables efficient, AI-driven HR support for employees.

To enable employee access and use of Voice AI agents, an admin must install the HR AI Voice Agents [sn_hr_voice_aia] plugin and Configure HR AI voice agents.

HR AI Voice agents

AI Agent	Description
AI Voice Employee Details Updater **Note:** Requires integration with Oracle HCM	Assists users in updating their personal information
AI Voice Employee Holiday Calendar Retrieval agent **Note:** Requires integration with Oracle HCM	Displays the company holiday calendar
AI Voice HR Case Assistant	Assists employees with following up on HR cases
AI Voice Retrieve Worker Profile **Note:** Requires integration with Oracle HCM	Enables employees to look up worker information in Oracle HCM
AI Voice Time off Requester **Note:** Requires integration with Oracle HCM	Helps employees look up their vacation, sick leave, or other time off information.
Navigation Assistant	Provides verbal, step-by-step guidance for HR self-service tasks based on ServiceNow® knowledge base articles. For more information, see Navigation Assistant AI voice agent
Travel Expense Expert Voice **Note:** Requires integration with Zoho	Assists employees with tasks related to travel expenses, including submitting expenses, retrieving expenses, and the expense policy.

Certain voice agents require integration with Oracle HCM or Zoho. For more information, see Integration of HR Service Delivery with third-party systems.

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Related topics

Deploy AI voice agents

Navigation Assistant AI voice agent

The Navigation Assistant AI voice agent provides employees with verbal, step-by-step guidance for HR self-service tasks.

The Navigation Assistant is an AI-powered voice agent designed to provide real-time, verbal guidance to employees to help them navigate HR self-service tasks within the Employee Center. The agent delivers step-by-step instructions for processes, such as requesting employment verification for a loan application.

The agent is highly responsive to user input. Employees can request the agent to repeat a step, to start the process over entirely, or to seek clarification if they are unable to perform a specific step.

Interaction features:

- **Live Agent Transfer:** In alignment with all AI Voice agents, the employee can request to be transferred to a live agent at any point during the interaction for additional support.
- **Automated Email Follow-up:** The Navigation Assistant automatically sends the Knowledge Base instructions via email to the employee for offline reference.
- **Session Management:** To optimize system resources, each call is subject to an automatic timeout and will end after ten minutes of activity.

Knowledge sourcing

To maintain accuracy, the Navigation Assistant utilizes Knowledge Base articles within the ServiceNow® instance as the sole source of truth. The agent does not synthesize or summarize information. It verbalizes the steps exactly as they are written in the Knowledge Base article.

Knowledge Base article requirements

For the Navigation Assistant to perform at an optimal level, content creators should follow these standards when drafting or updating HR Knowledge Base articles:

- **Explicit Step Sequencing:** All procedural content must be presented in a numbered list format. Bulleted lists are not supported for step-by-step guidance, as the agent relies on numerical sequencing to maintain the flow of the verbal interaction.
- **Descriptive Titling:** Article titles must be highly descriptive and keyword-rich. This ensures the agent can accurately identify and retrieve the most relevant article in response to a specific employee query.
- **Plain Text:** Articles must avoid the use of special characters, including currency symbols (e.g., use "USD" or "dollars" instead of "$"). Special characters can lead to unpredictable verbalization by the AI voice engine.
- **Verbatim Verbalization:** The agent provides a direct verbal read-out of the text. It will not perform summarization. Content creators must ensure that articles are concise and free of redundant or repetitive information, as the agent will verbalize every word as written.

HCM AI agents

Place requests to the Human Capital Management (HCM) system using the HR Service Delivery AI agent collection.

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HCM AI agents Overview

You can submit requests to the HCM system, for example, apply for time off or update your details, using the HR Service Delivery AI agent collection in Employee Center. To access and use the HCM AI agents, ensure to Configure HCM AI agents from the HR Service Delivery AI Agent Collection.

Worker profile retriever AI agent

The Worker profile retriever AI agent enables you to find details about a colleague. The details could include the department, job, email, or phone number, based on your request.

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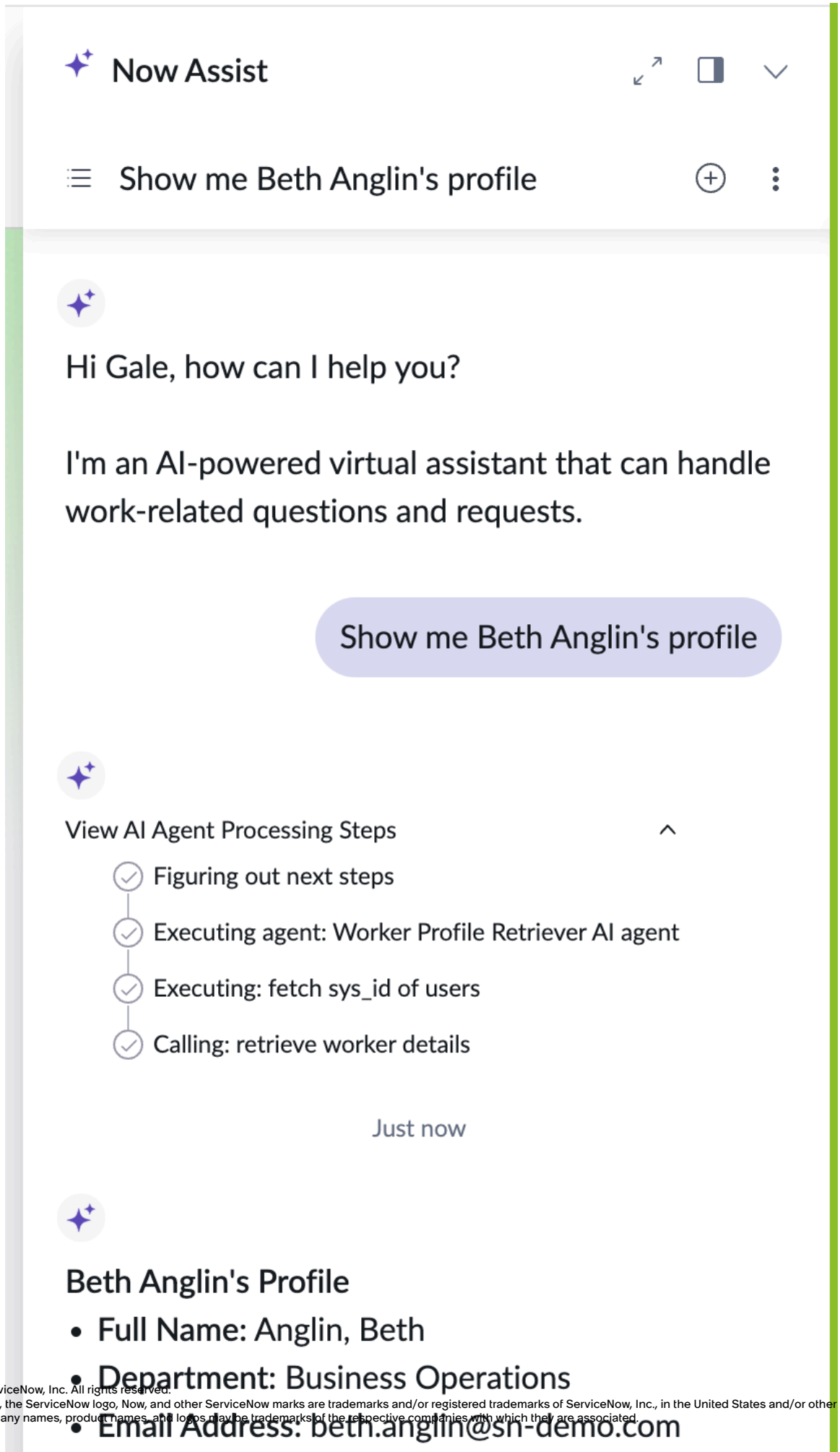

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Employee holiday calendar retrieval AI agent

The Employee holiday calendar retrieval AI agent retrieves holiday information for the specified year.

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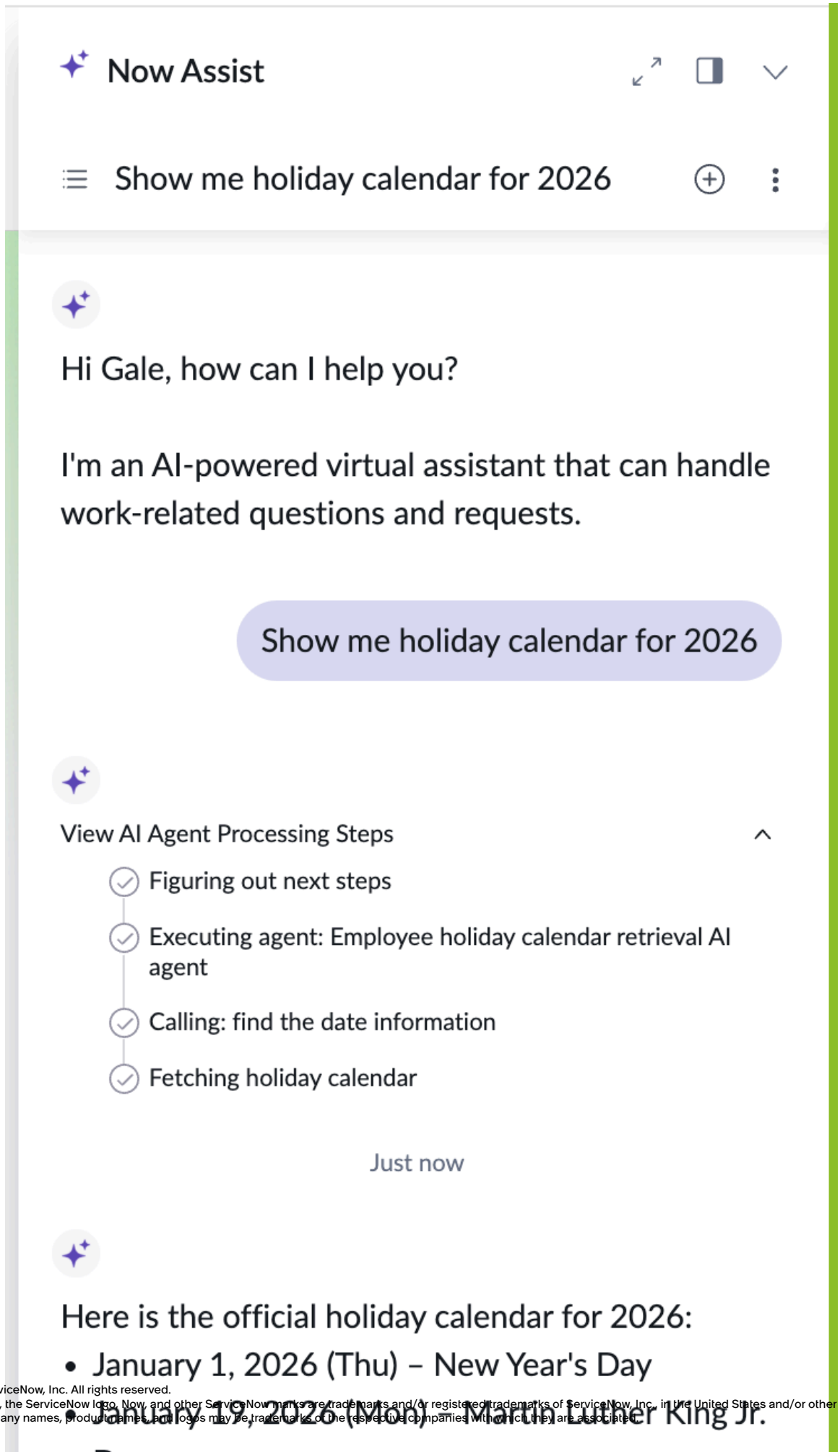

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Time off requester AI agent

The Time off requester AI agent enables you to request time off or retrieve your time off balance.

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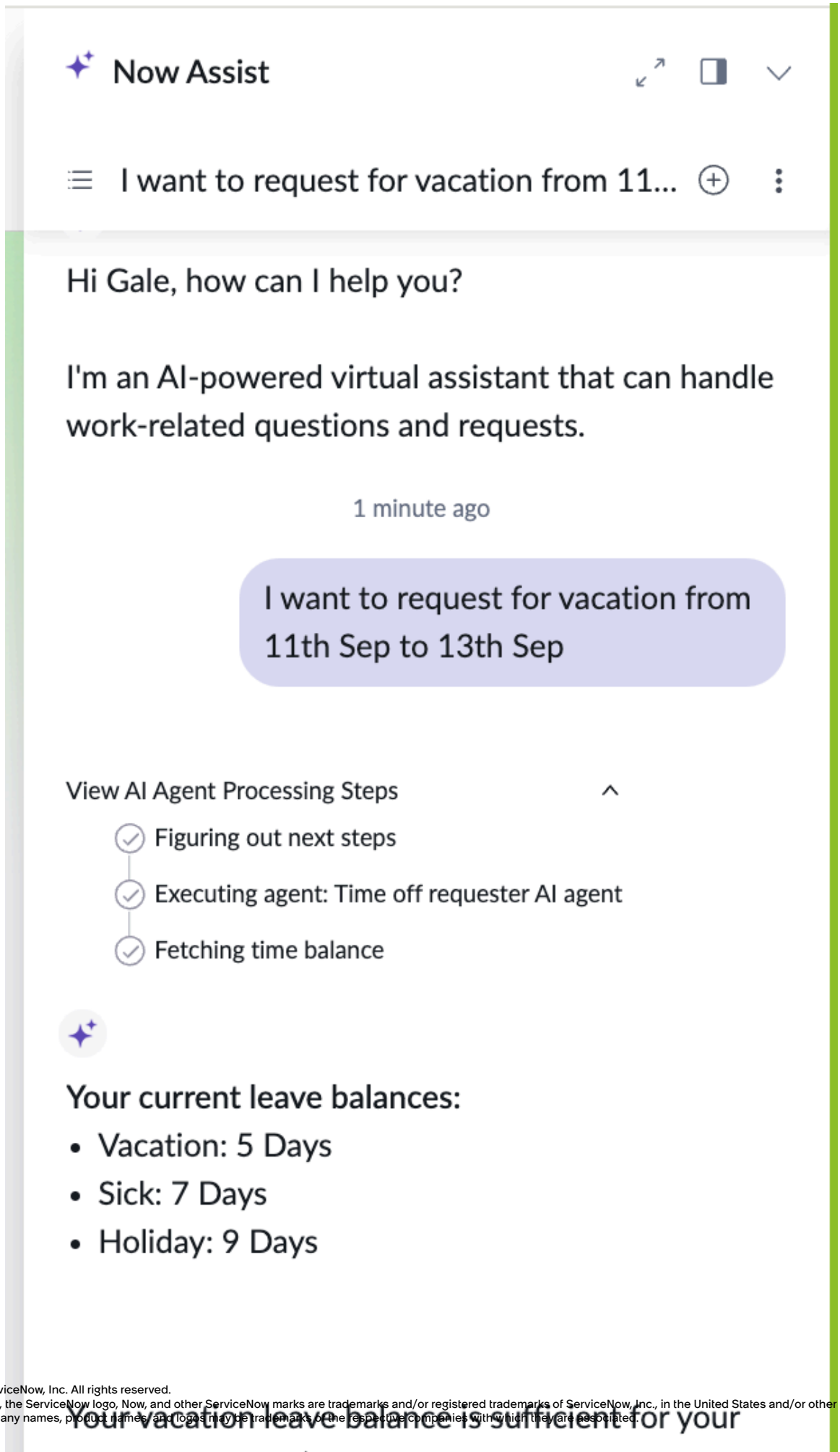

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Employee total rewards information AI agent

The Employee total rewards information AI agent enables you to retrieve your total rewards details.

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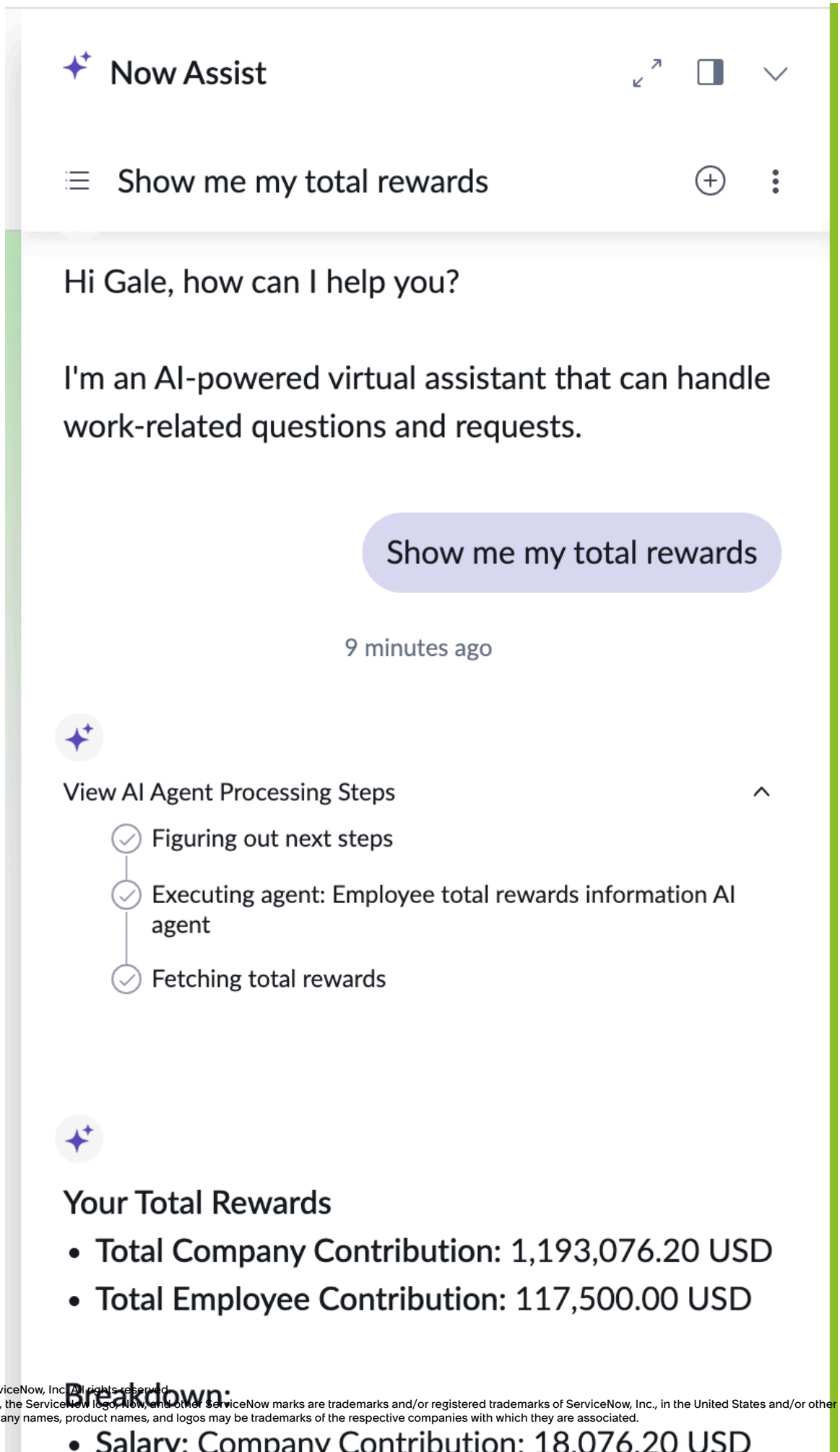

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Benefits enrollment retriever AI agent

The Benefits enrollment retriever AI agent enables you to view the benefits information you're enrolled in.

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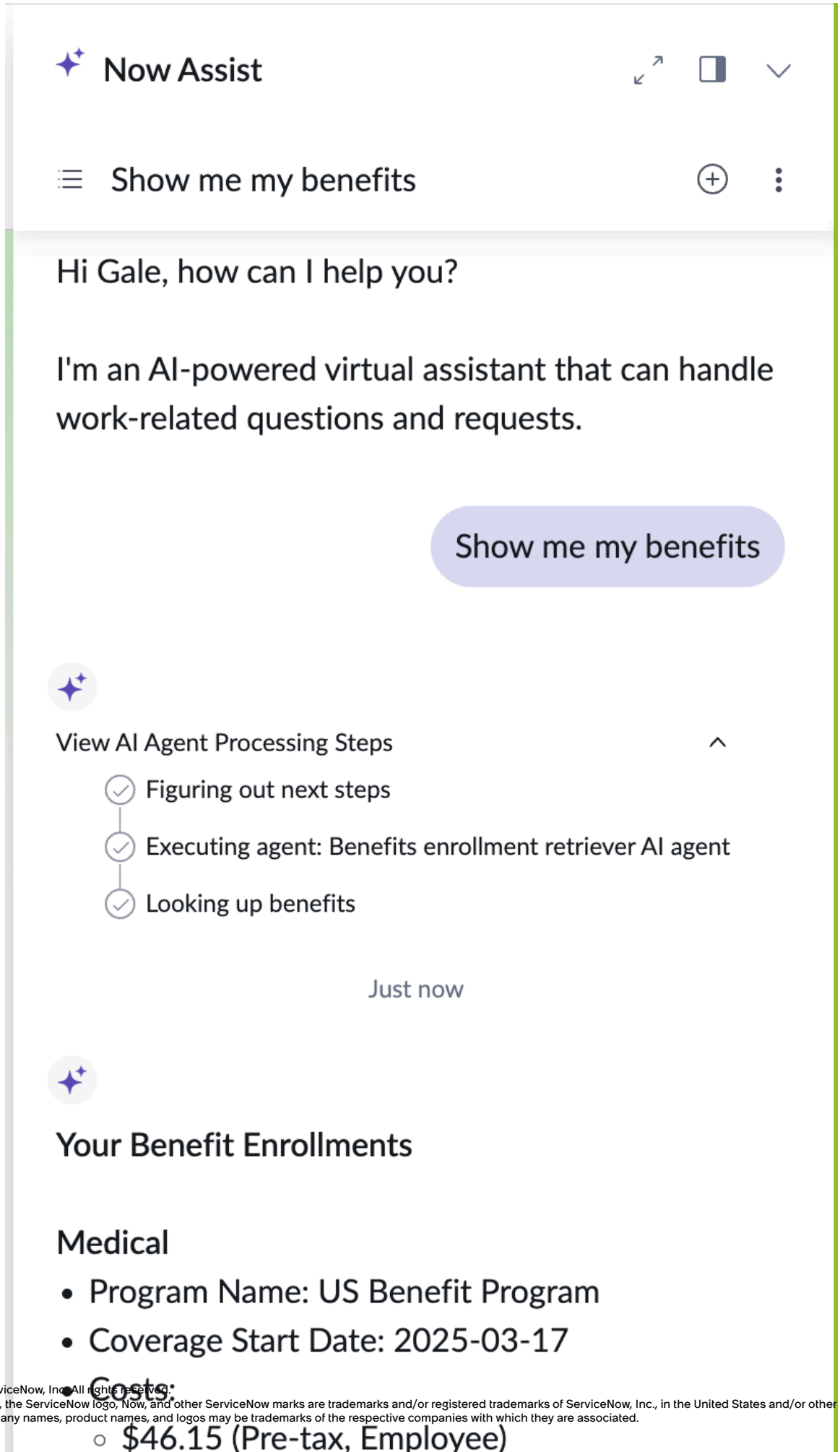

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Employee details updater AI agent

The Employee details updater AI agent enables you to update personal information such as email address, phone number, home address, blood type, and date of birth.

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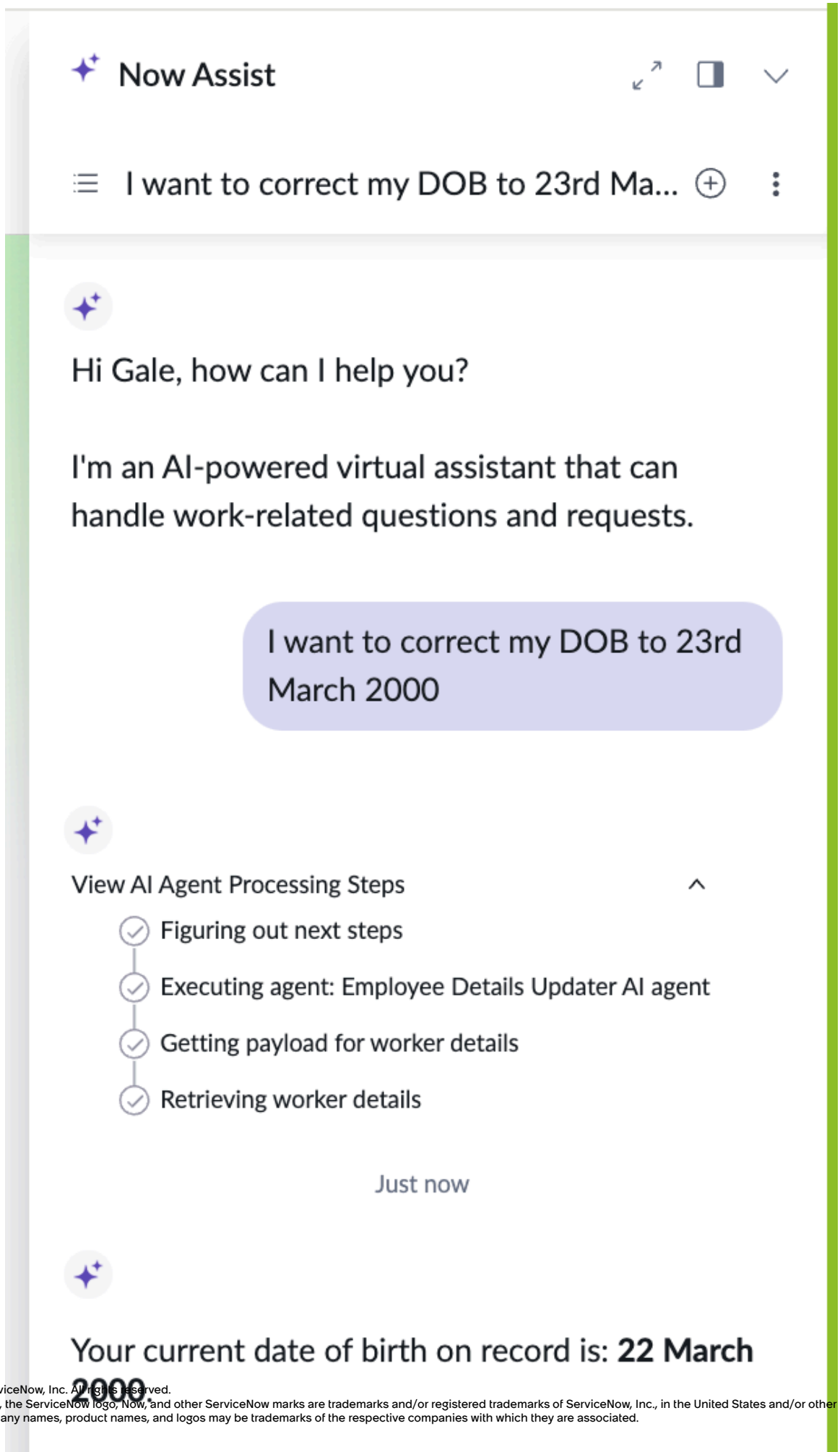

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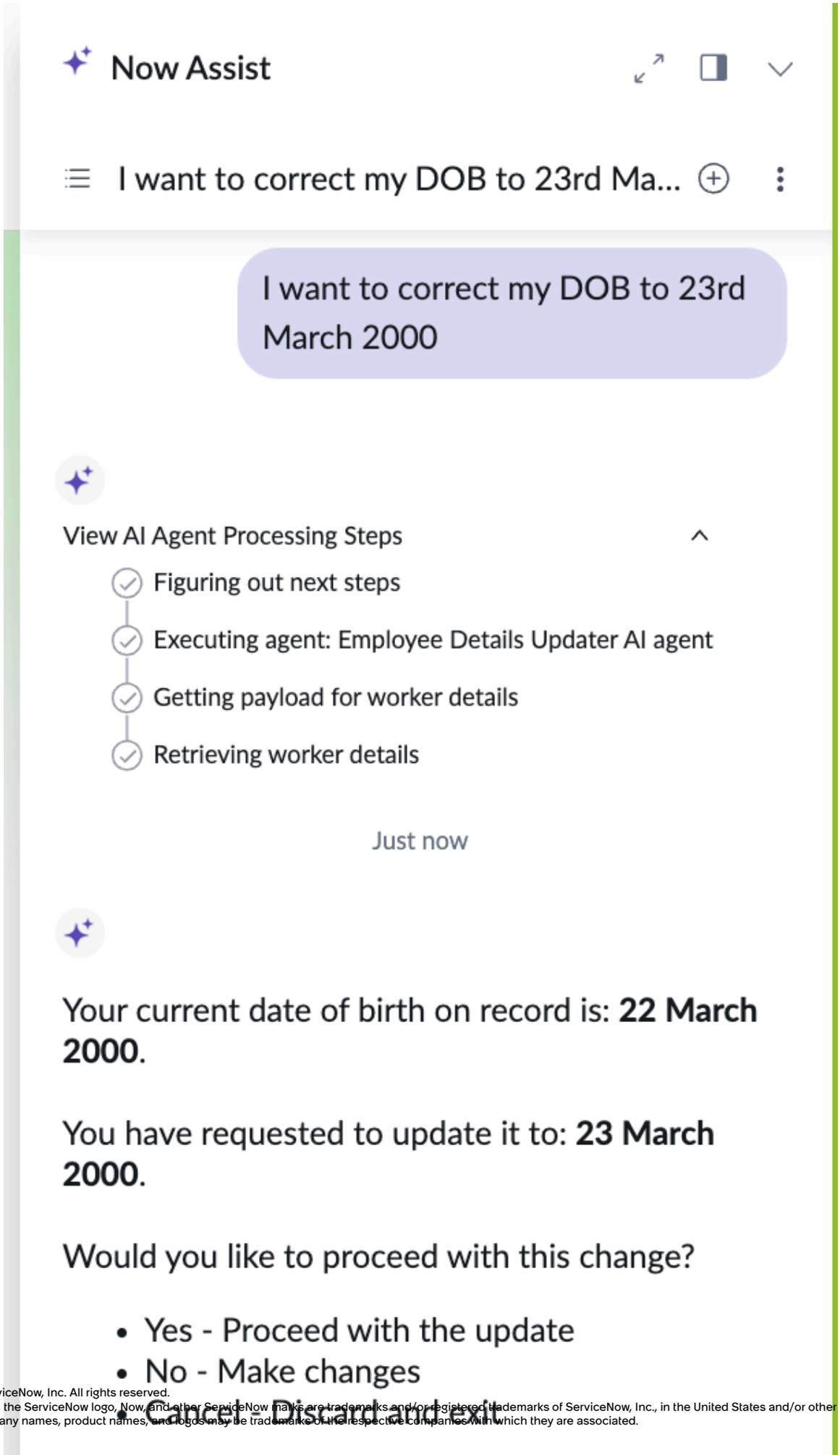

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HCM feedback retriever AI agent

The HCM feedback retriever AI agent enables you to view feedback you have received in the HCM system.

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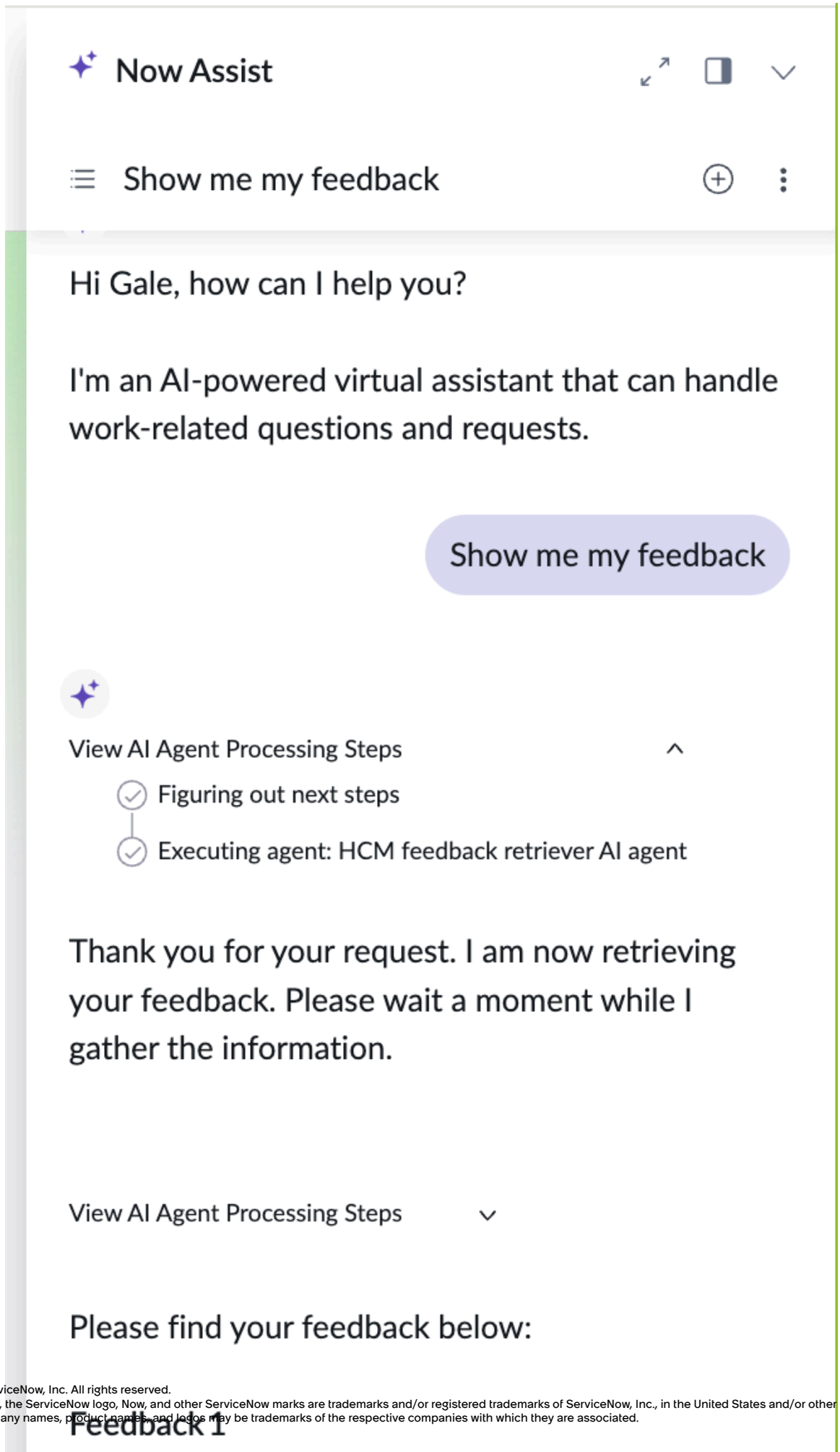

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View paychecks AI agent

The View paychecks AI agent enables you to view paycheck summaries for the selected period.

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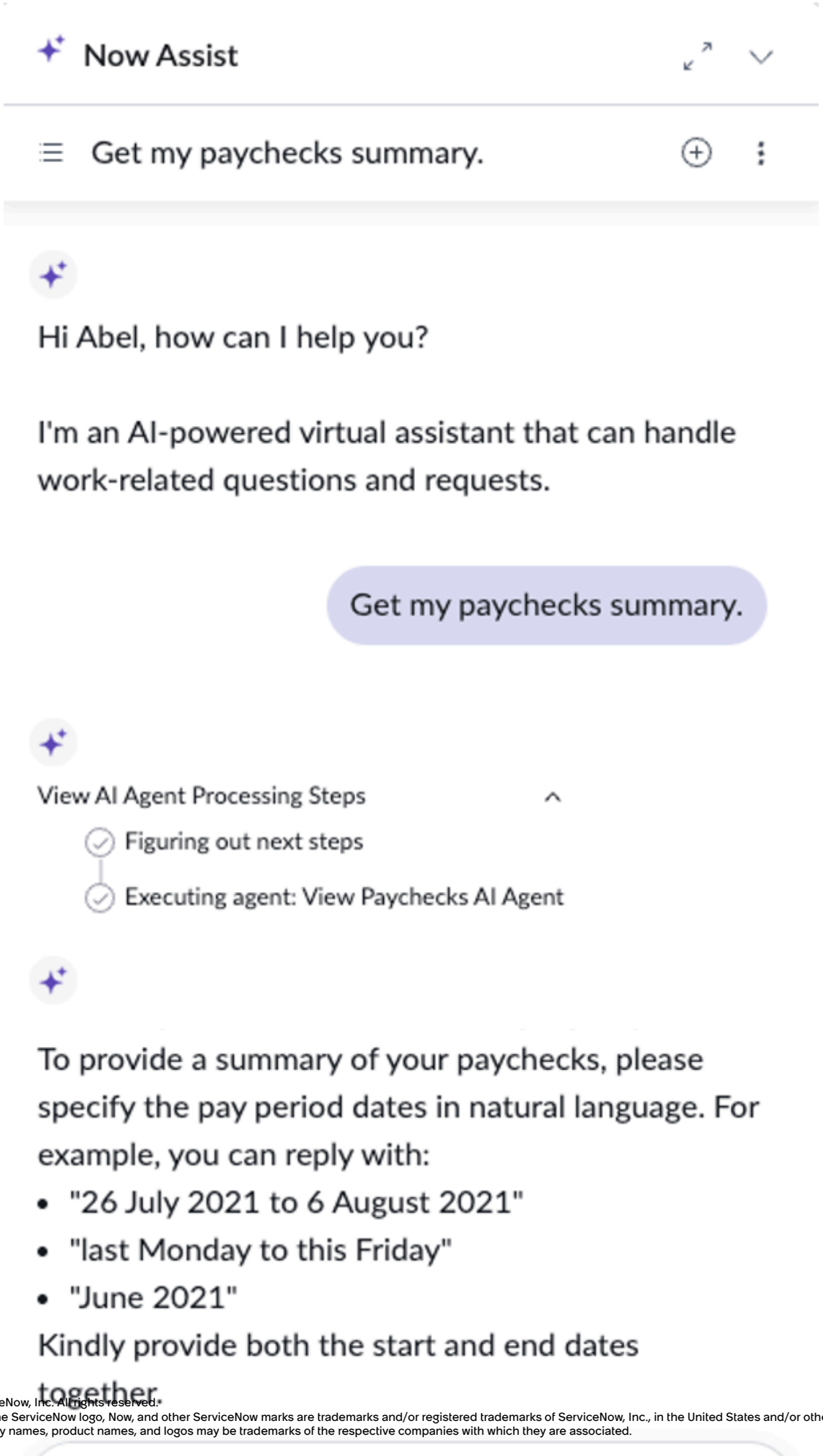

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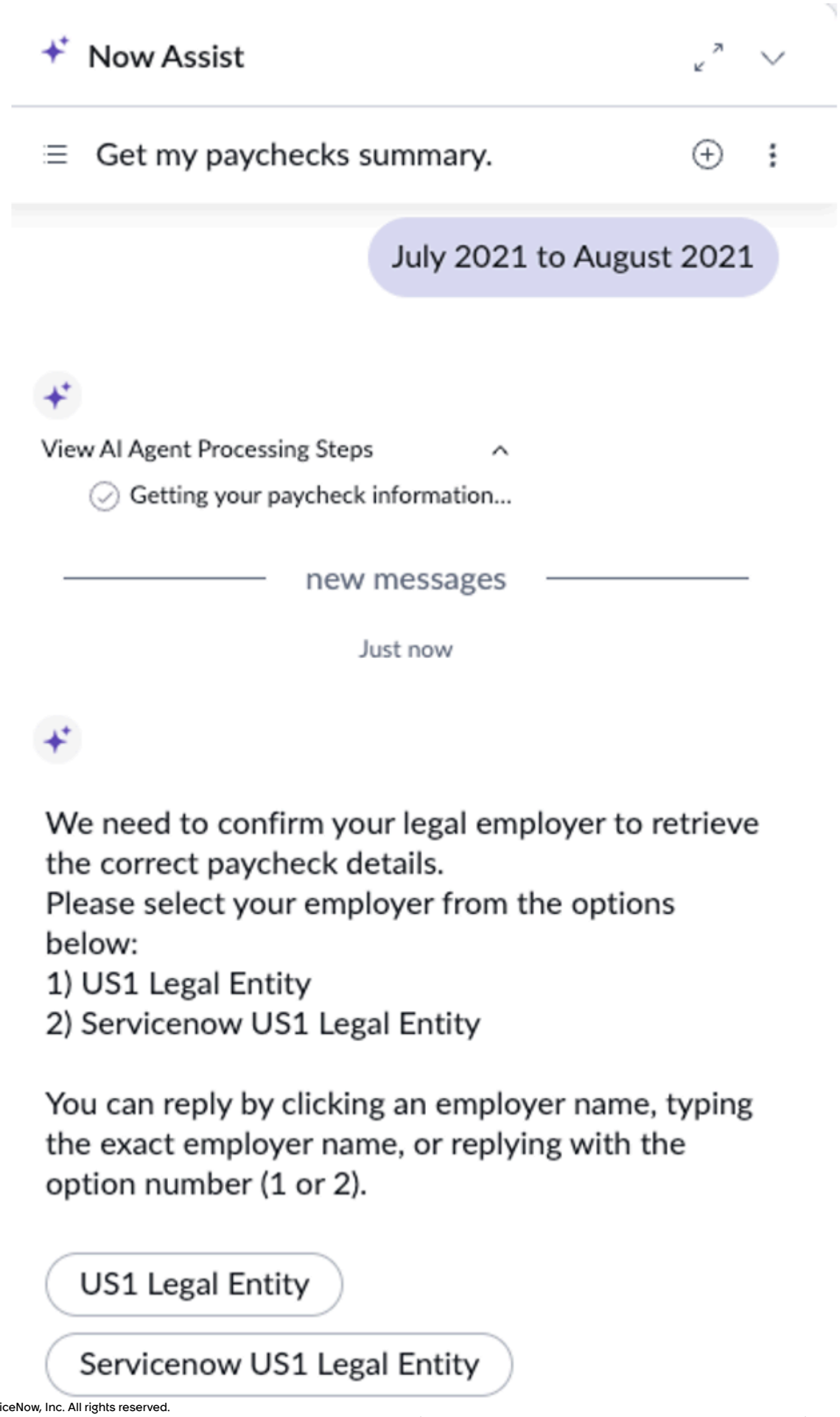

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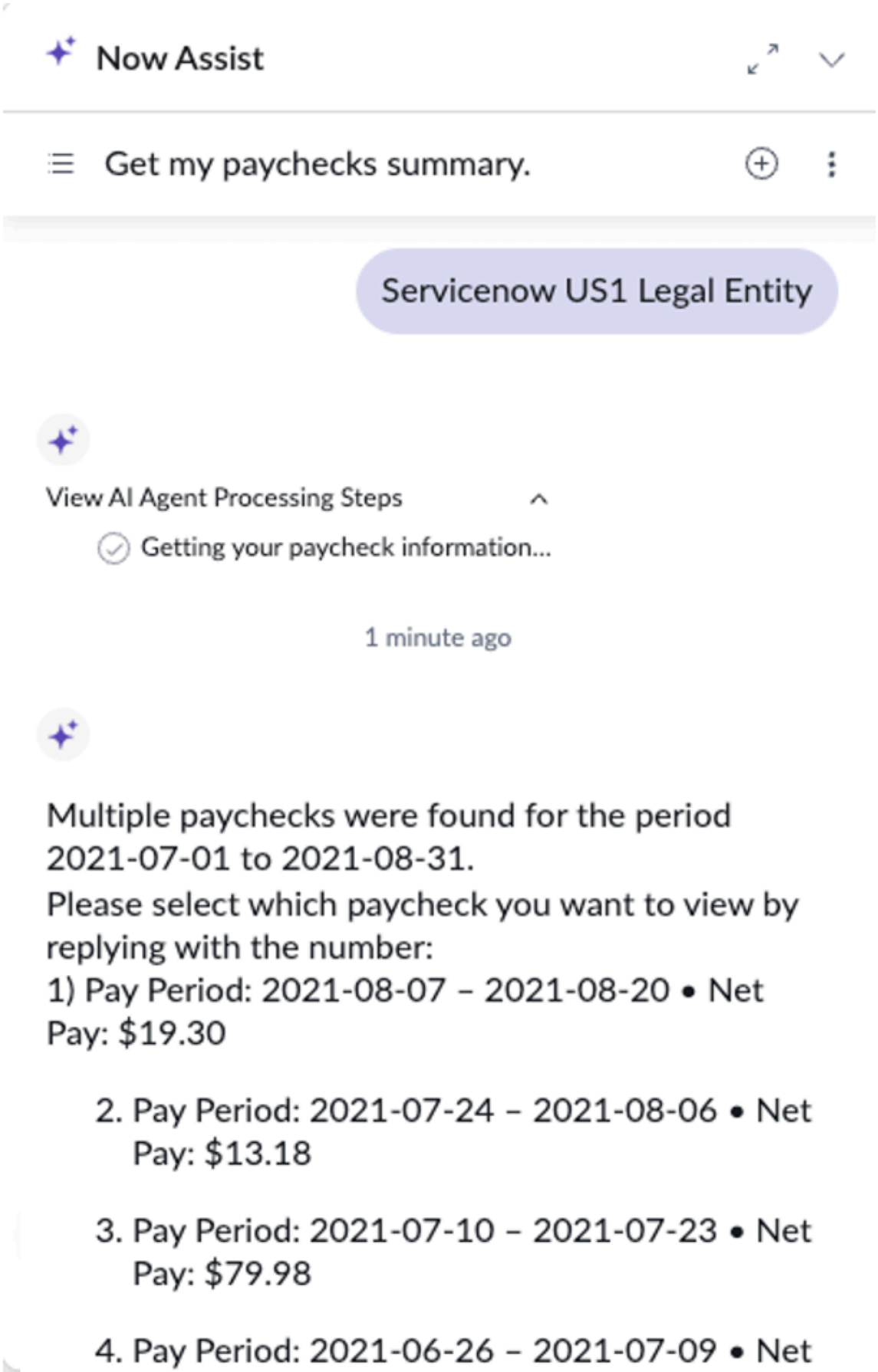

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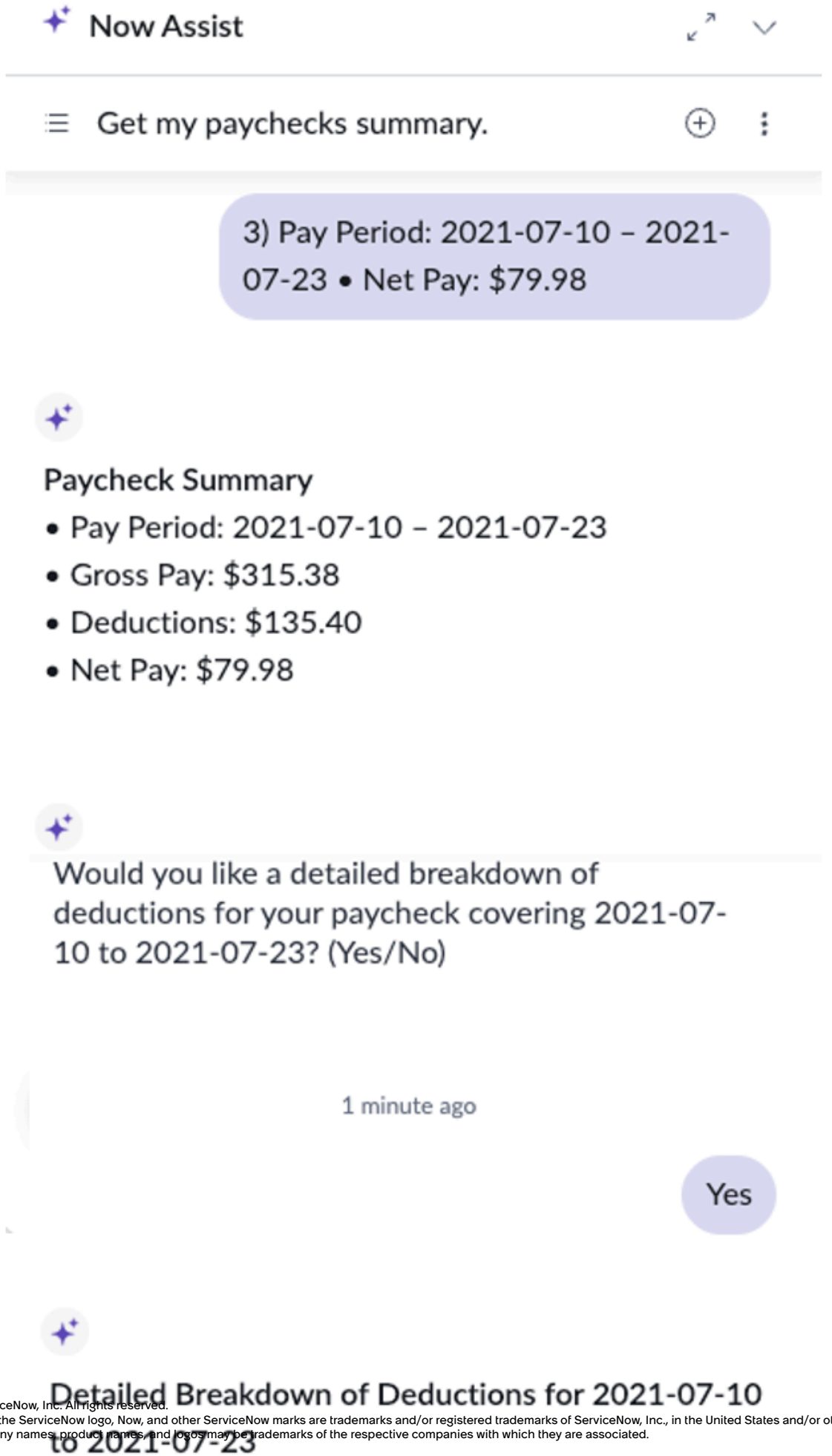

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Use Now Assist for HR Service Delivery (HRSD) in Agent Workspace

If you have a sn_hr_core.case_writer role, you can summarize a case, generate resolution notes, summarize the chat interactions with a requester, and propose resolutions more quickly with the Now Assist for HR Service Delivery (HRSD) application.

Important: Some Now Assist skills, agents, and agentic workflows are turned on by default. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Summarize a chat conversation using Now Assist for HR Service Delivery (HRSD)

Summarize a Virtual Agent chat history in the Now Assist for HR Service Delivery (HRSD) application. You can also summarize an interaction when the chat ends. The summary includes all points of the handoff, including the Virtual Agent conversation.

Before you begin

Role required: sn_hr_core.case_writer

About this task

In a Virtual Agent conversation, when a requester chooses to connect to a live agent, a chat interaction appears in the inbox of an agent. You can also summarize an interaction when the chat ends. The summary includes all points of the handoff, including the Virtual Agent conversation.

Note:

The chat summarization admin configuration for ITSM and HR are similar. If at least one of them is enabled, you can generate a chat summary from both workspaces.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

Procedure

1. Navigate to **Agent Workspace for HRSD**.
2. In Workspace, open the inbox.
3. Accept the chat interaction.
   In the Active Chat window, a summary of the Virtual Agent conversation is generated. The summary includes the actions that were taken before the requester engaged with the live agent.
4. Chat with the requester to get any additional details.
5. In the Active Chat window, use the `/summarize` quick action to summarize the chat during the conversation with the requester.
6. End the chat conversation by selecting **End Chat**.
   The chat summarization updates the **Short description** and **Chat Summary** fields when you end the chat.

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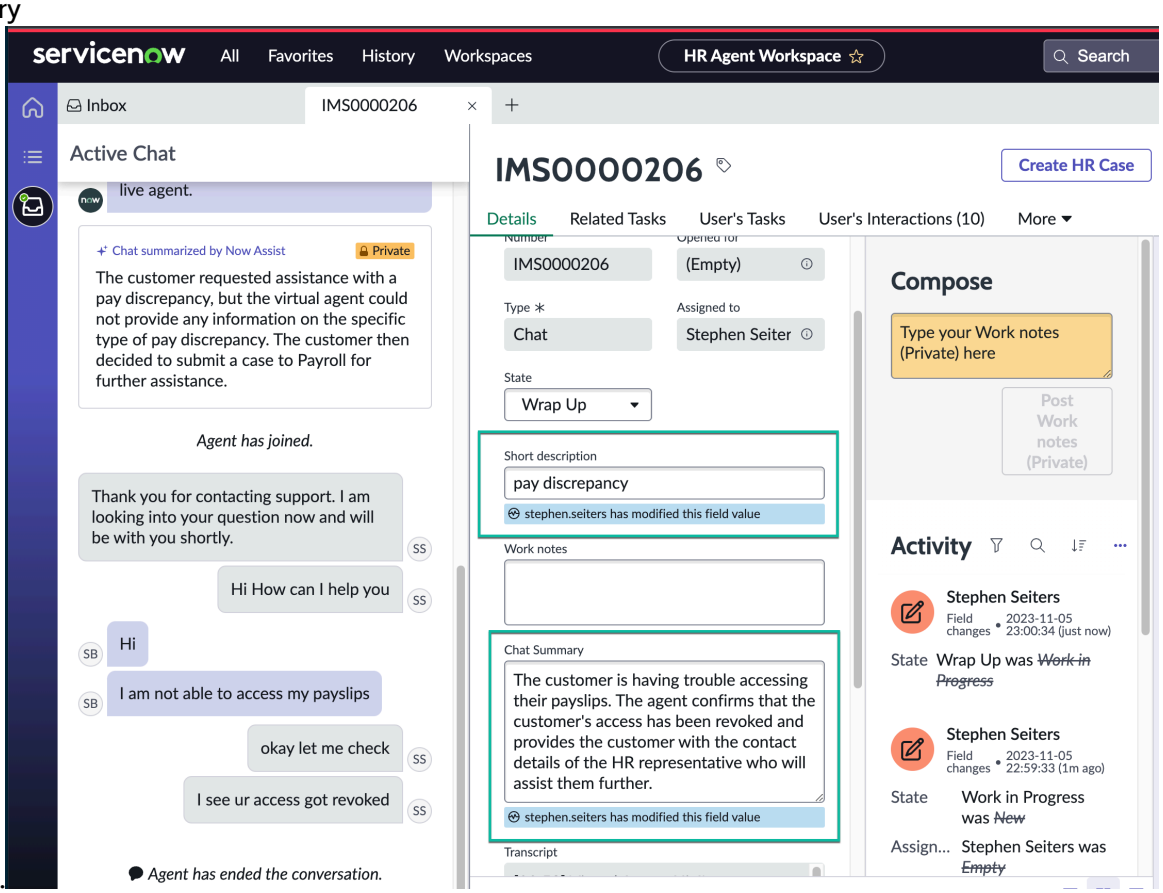
7. **Optional:** Review the text in the **Short description** or **Chat Summary** fields and make the necessary changes.



Because the information in these fields is automatically generated, it's a good idea to review the text and make sure that it's accurate.

8. Select **Save**.
9. **Optional:** If you think that you need further help after the initial troubleshooting before or after ending the chat, create a case from the interaction by selecting **Create HR case**.
10. **Optional:** When you create a case before or after ending the chat, the **Short Description** and **Description** fields of the case are updated with the interaction summary.

> **Note:** Generative AI doesn't override an existing short description that is in the HR case template.

Summarize a Sidebar discussion by using Now Assist for HRSD

Generate a summary of the Sidebar discussions between agents, requesters, and subject matter experts by using the chat summarization skill in the Now Assist for HR Service Delivery (HRSD) application.

Before you begin

Role required: sn_hr_core.case_writer

About this task

You can do these actions by using Sidebar discussion summarization:

- Summarize the Sidebar discussion at any point during the discussion using the `/Summarize` quick action.
- Share the Sidebar discussion to the work notes.
- Provide feedback for the summary.

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Note: The Sidebar discussion summarization skill can be found in the **HRSD** tab under the **Employee** group in Now Assist Admin.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

Procedure

1. Navigate to **Workspaces** > **Agent Workspace for HRSD** and open an HR case that supports Sidebar discussion and summarization.
2. Choose an existing discussion, or start a new discussion.

   Start a new discussion by doing these actions:

   a. Select **Discuss**.

   b. In the Start a Sidebar discussion modal, add participants.

   c. Select **Start Discussion**.
3. Generate a summary of the Sidebar discussion during the conversation either by using the Summarize quick action (enter `/Summarize` in the Active sidebar discussion window), or by selecting the quick action icon .
4. After summarizing the Sidebar discussion, you can add it to the case work notes, and provide feedback about it.

Option	Procedure
Save the summary information by adding it to the case work notes	a. Select **Share as Work notes**. b. In the Share Case summary as Work notes dialog box, edit the summary. c. Select **Save to Work notes**.
Provide feedback for the summary	If you'd like to provide feedback, select either the helpful icon ( ) or the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).

Generate a chat reply recommendation by using Now Assist for HRSD

Generate a reply based on the context of the chat conversation using Now Assist icon. Chat reply recommendations can help provide agents with quick replies to common questions.

Before you begin

Role required: admin

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About this task

You can do these actions by using the Now Assist icon:

- Generate a recommended reply that is based on the context of the conversation.
- Refine the recommendation by elaborating or shortening the response.

Note: The Chat reply recommendation skill can be found in the **HRSD** tab under the **Employee** group in Now Assist Admin.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Procedure

1. Navigate to **Workspaces** > **Agent Workspace for HRSD**.
2. Open the inbox and accept the chat interaction.
   In the Active Chat section of the interaction, a summary of the Virtual Agent conversation is generated. The summary includes the actions that were taken before the requester engaged with the live agent. With this information, you can get an overview of what the requester has already mentioned in the Virtual Agent conversation and troubleshoot the issue.
3. Chat with the requester to get any additional details about their question or issue, if needed. For example, if the requester is having an issue with hardware, you may need the hardware model number and serial number.
4. In the chat message window, either type a response, or leave blank, and then select the Now Assist icon ✦

Chat message window	Now Assist icon
Typed response	Provides the option to refine your response: ○ Elaborate ○ Shorten
Left blank	Generates a recommended reply that is based on the context of the conversation up to this point.

   The reply response appears in the Now Assist icon modal.
5. Review the generated reply and select **Refine** to modify the response, or select **Insert** to paste the response into the chat message window.
   If the reply response was refined, you can toggle between versions.
6. In the chat message window, select **Send**.
7. End the chat by selecting **End Chat**.

Generate a knowledge article from HR Agent Workspace with Now Assist for HRSD

Create drafts of knowledge articles that are based on the case descriptions with Now Assist for HR Service Delivery (HRSD). Generating article content with generative AI enables you to write efficiently as you address user concerns.

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Before you begin

- Install the following plugins:
  - Knowledge Management Advanced plugin [com.snc.knowledge_advanced.installer]; This is not a mandatory plugin and it cannot be uninstalled.
  - Now Assist in Knowledge Management [sn_km_gen_ai]
  - Human Resources Scoped App: Core [com.sn_hr_core]
  - Latest version of Agent Workspace for HR Case Management [sn_hr_agent_ws]
  - Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events]
  - Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations]
- Activate the Knowledge Assist skill from the Now Assist Admin console.

Role required:

- sn_hr_core.case_reader and sn_hr_core.kb_writer roles to view the **Create Knowledge** option on the HR Case [sn_hr_core_case] and its extended tables.
- sn_hr_le.case_reader and sn_hr_core.kb_writer roles to view the **Create Knowledge** option on HR Lifecycle Events Cases.
- sn_hr_er.case_reader, sn_hr_core.kb_writer roles to view the **Create Knowledge** option on employee relations cases.
- You should also have the required role for the knowledge base that you selected in the Now Assist Admin configuration.

About this task

You can use the KB generation skill in either Core UI or Agent Workspace for HR Case Management. The fields that are used as inputs for generating a knowledge article are the Short description, description, close notes, worknotes, and additional comments fields.

Note: The KB generation skill is supported in Now Assist panel for the HR Case records [sn_hr_core_case] table, but not on its extended table records.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

Procedure

1. Navigate to **Workspaces** > **HR Agent Workspace**.
2. Select the **Lists** icon ( ).
3. Open an HR case in the **Close Complete** state.
4. Select the More Actions icon(•••)
5. Select **Create Knowledge**.
6. Select a knowledge base and an article template in the modal, then select **Create Article**.

   Note: If the Knowledge Management Advanced plugin [com.snc.knowledge_advanced.installer] is installed and at least one article template is enabled, a modal is displayed so that you can select a knowledge base and article template. Otherwise, the article is created with the standard template.

7. Select one of the following in the **Use AI to draft this article?** modal.

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Option	Description
Yes, draft with Now Assist	Use Now Assist to draft an article based on task details. You can review and edit the article before it is published.
No, write it myself	Draft the article manually.

8. Review the **Article body**.
9. Select **Save**.
   The article appears in a new tab with a unique ID number for the knowledge article.
10. View, save, or publish the article by using the UI actions on the screen.

Related topics

Now Assist in Knowledge Management

Generate a knowledge article from multiple cases

Create drafts of knowledge articles from multiple cases with the Now Assist for HR Service Delivery (HRSD) application. Use generative AI to gather and create the content from multiple cases so that you can reduce the amount of time that you would have spent manually to get the same information.

Before you begin

- Install the following plugins:
  - Knowledge Management Advanced plugin [com.snc.knowledge_advanced.installer]; This is not a mandatory plugin and it cannot be uninstalled.
  - Now Assist in Knowledge Management [sn_km_gen_ai]
  - Human Resources Scoped App: Core [com.sn_hr_core]
  - Latest version of Agent Workspace for HR Case Management [sn_hr_agent_ws]
  - Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events]
  - Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations]
- Activate the Knowledge Assist skill from the Now Assist Admin console.

Role required:

- sn_hr_core.case_reader and sn_hr_core.kb_writer roles to view the **Generate article** option on the HR Case [sn_hr_core_case] and its extended tables.
- sn_hr_le.case_reader and sn_hr_core.kb_writer roles to view the **Generate article** option on HR Lifecycle Events Cases.
- sn_hr_er.case_reader, sn_hr_core.kb_writer roles to view the **Generate article** option on the employee relations cases.
- You must have the required role for the knowledge base that you selected in the Now Assist Admin configuration.

Note: For Core UI users, in the **AI search indexed sources**, you must set the **Active** state to **true** for the HR Case (source: HR Case sn_hr_core_case) table. The required roles to make this change are the **HR Admin** and **Agent** roles.

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About this task

You can use the KB generation skill in either Core UI or Agent Workspace. The fields that are used as inputs for generating knowledge articles are the Short description, description, close notes, work notes, and additional comments fields. You can also use up to five additional relevant tasks to help you create knowledge articles.

Note: The KB generation skill is supported in the Now Assist panel for the HR Case records [sn_hr_core_case] table, but not on its extended table records.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

Procedure

1. Navigate to **Workspaces** > **HR Agent Workspace**.
2. Open an HR case that is assigned to you.
3. Set the HR case to the **Close Complete** state.
4. Select **Create knowledge**.

   Note: You can now select what type of article that you want to create.

5. If displayed, select a **Knowledge base** and an **Article template** .

   Note:

   - If your admin installed the Knowledge Management Advanced plugin [com.snc.knowledge_advanced.installer] and enabled at least one article template, a modal is displayed so that you can select the knowledge base and article template. Otherwise, the article is created with the standard template.
   - Disable the Use Now Assist to draft an article toggle if you don't want the AI to generate a knowledge article.
   - Additional tasks that are relevant to your case can be used to draft your article. You can select up to five relevant tasks to help you create your article.

6. Select **Create Article**.
7. Select **Draft article** with **Now Assist**.

   Note: You see the message "We have found additional relevant tasks-select up to 5 to help in the creation of article." You also see a list of relevant tasks that you can select from.

8. Select up to five tasks to help you create your article.
9. If you don't need any other tasks to help you create your article, select **Continue without more tasks**.

   Note: Now Assist starts to generate a draft of a an knowledge article and you see the "Drafting article" message box. After Now Assist finishes the draft and loading the article successfully, the article gets a unique ID number.

10. View, edit, or publish the article by using the UI actions on the screen.
    Now Assist has generated your article from multiple cases.

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Generate an email reply recommendation using Now Assist for HRSD

Generate an email reply that is based on the case and email context by using the Now Assist icon. With email reply recommendations, agents can create quick emails or responses, helping minimize errors and ramp up productivity.

Before you begin

Role required: admin

About this task

An agent can do these actions by using the Now Assist icon:

- Generate a recommended email reply that is based on the case and email context.
- Generate recommended email for new, forwarded, and finishing draft emails.
- Refine the recommendation by elaborating or shortening the response.
- Availability of email template recommendations while composing an email.

Note: The email reply recommendation skill can be found in the **HRSD** tab under the **Employee** group in Now Assist Admin.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

Procedure

1. Navigate to **Workspaces** > **Agent Workspace for HRSD** and open an HR case that supports the email reply recommendation.
2. Choose how to compose an email.

Method	Description
Compose email from More actions	**a.** Select **Compose email**. **b.** Write six or more words and then select the words that you just wrote to see the Now Assist icon **c.** Select the Now Assist icon to generate a response. **d.** Select **Refine** to shorten or elaborate the content. **e.** Get a recommendation that is based on the existing context.

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Method	Description
Compose an email from Activity stream	**a.** In the activity stream, select an existing email that you want to reply to. **b.** Position your cursor within the email mes sage window to see the Now Assist icon ✦. **c.** Select the Now Assist icon ✦ to receive a recommendation that is based on the exist ing context.

3. In the email message window, either type a response, or leave blank, and then select the Now Assist ✦.

Email message window	Now Assist icon
Typed response	Provides the option to refine your response: ○ Elaborate ○ Shorten
Left blank	Generates a recommended email reply that is based on the context of the email up to this point.
Use template	Shows email template recommendations while composing an email.

4. Update the selected text with refined text by selecting **Replace**.
5. Review the generated email reply and select **Refine** to modify the response, or select **Insert** to paste the response into the chat message window.
6. Select **Send Email** or discard the draft if you don't like the recommendation.

Summarize an HR case using Now Assist for HRSD

Quickly understand the case context and respond to inquiries by using the case summarization skill.

Before you begin

Role required: sn_hr_core.case_writer

About this task

You can use the case summarization skill in either Core UI or Agent Workspace for HR Case Management.

- In Core UI, the summary appears in a banner in the case record.
- In Agent Workspace for HR Case Management, the summary is generated in the **Details** tab.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

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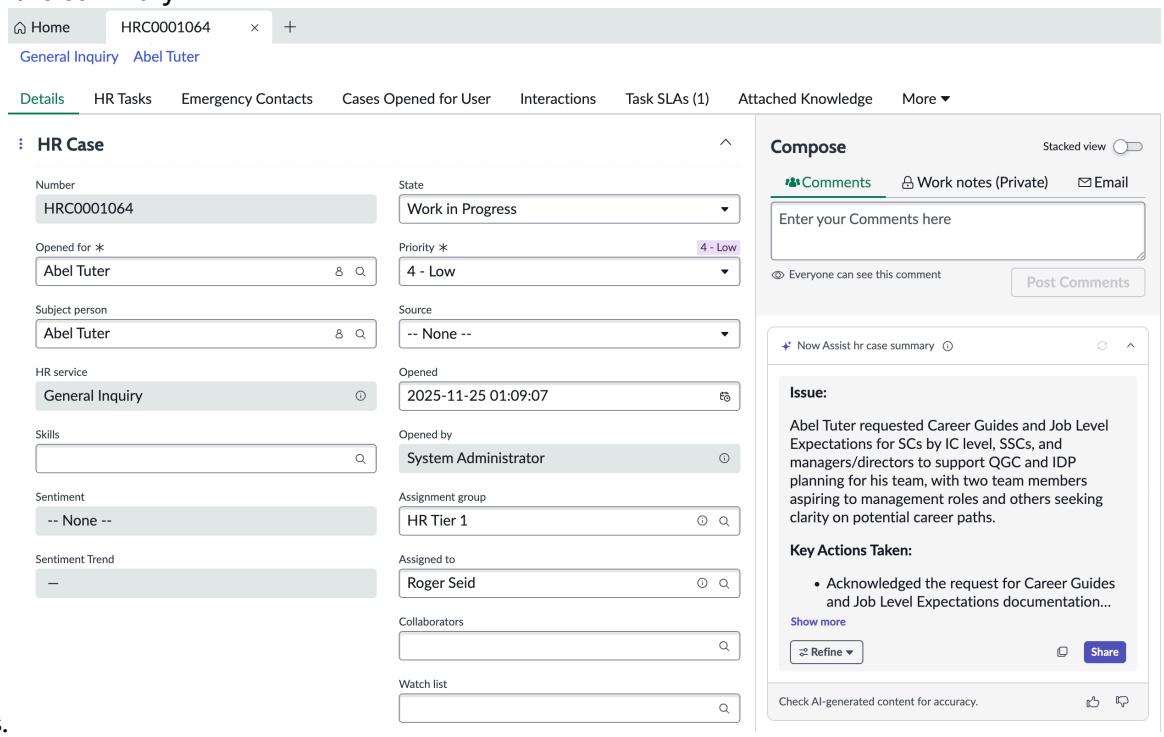
Procedure

1. Navigate to **Agent Workspace for HRSD**.
2. In Workspace, open an HR case that is assigned to you.
3. Select **Summarize**.
4. Review the summary details.



A concise summary of a case, including the issue, actions taken, SLA, attachments, and resolution information appears. The information that is displayed is based on the state of the case:

- Draft or Ready: Issue
- Work in progress: Issue and Actions taken
- Awaiting acceptance, Awaiting approval, Closed complete, or Closed incomplete: Issue, Actions taken, and Resolution
- Canceled or Suspended: Summary isn't visible

5. **Optional:** When you finish summarizing a case, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the case work notes	**a.** Select **Share**. **b.** In the **Share to work notes** dialog box, edit the summary. **c.** Select **Save to Work notes**.
Expand or collapse the summary	Select the **Show more** or **Show less** button to see more or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, se lect the helpful icon ( ). If you think that the

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Option	Procedure
	summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future ver sions of this skill.
Copy the case summary	Select the copy icon ( ) to use the case summary information for another purpose, such as pasting into an email.
View the information about the case summa ry	If you want to check some details about the summary, select the more info icon ( ).

Generate resolution notes using Now Assist for HRSD

Generate the resolution notes for a case using the resolution notes generation skill. You can improve the quality of the resolution notes by providing a summary of the issue and the steps that were taken to resolve the case.

Before you begin

Configure resolution notes generation for Now Assist for HRSD

Role required: sn_hr_core.case_writer

About this task

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

You can make a copy of this skill to configure it to meet your business needs. For more information, see Make a copy of a Now Assist skill.

Procedure

1. **All** > **HR Case Management** > **Agent Workspace for HR Case Management**
2. Open an HR case that is assigned to you.
3. After you finish working on the case, change the state of the case to **Closed Complete**.
4. Select one of the following in the **Add resolution notes** window.

Option	Description
Save notes	Add resolution notes to the **Close notes** field. **Note:** Review the generated text and make sure it's accurate. You may edit the notes or delete them to provide your own.
Skip notes	Skip adding resolution notes to the case.

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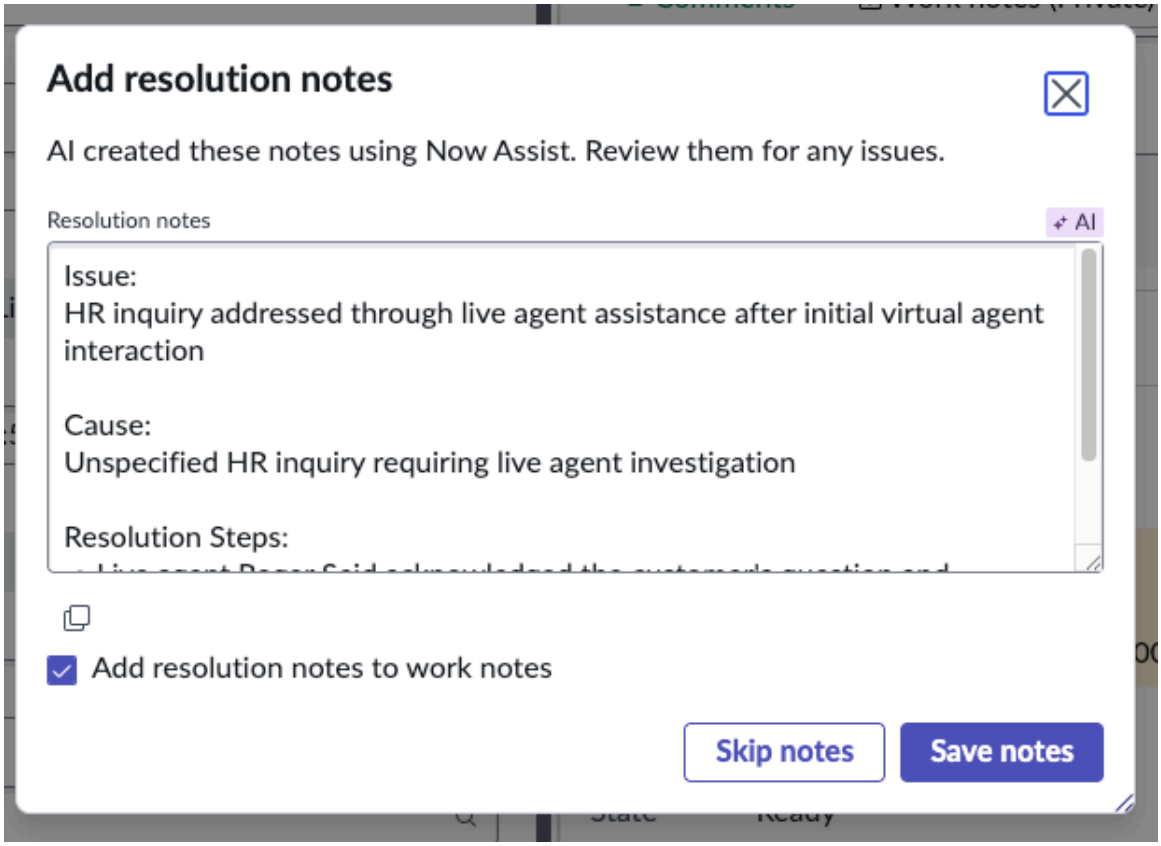
5. **Optional:** Select the **Add resolution notes to work notes** check box to include the resolution notes in the **Work notes** field.



6. **Optional:** Edit the resolution notes using the Now Assist context menu.
   Resolution notes can be generated from the Now Assist context menu even when the case isn't in **Closed Complete** state.

   a. In the **Close notes** field, select the Now Assist icon( ).

   b. Select **Refine** to elaborate or shorten the text.

   c. Select **Insert** to add the generated content into the **Close notes** field.

View employee summary reports

View the Employee Summary Virtual Agent topic in Employee Center to access employee contribution summaries, view consolidated profiles, and track employee progress.

Before you begin

You must have one of the following plugins to view this topic:

- Manager Hub (sn_mh)
- Leader Hub (sn_egd_lh)

Role required: sn_egd_lh.leader or sn_mh.manager_hub_user

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select the Open chat window icon ( ).
3. Enter `Employee Summary`.

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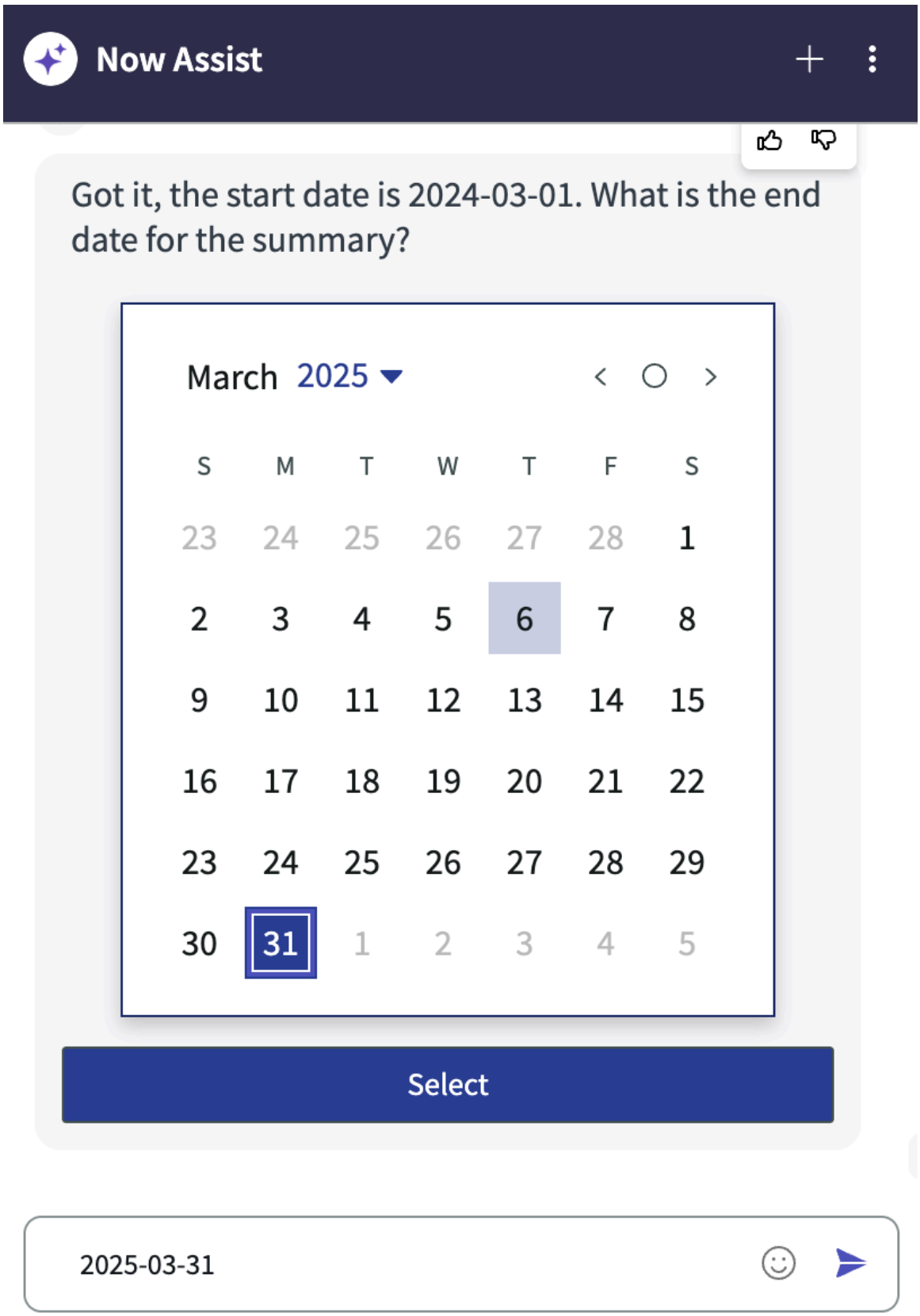
4. Select the employee that you want to view the summary for.

   Note: You can view summaries only for your direct and indirect reports.

5. Select a start and end date from the calendar.



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Note: The duration between the start and end dates must not exceed one year.

6. Select **Make changes** if you want to make changes, otherwise select **Looks good**.

Result
The Employee summary report is available to review. You can enter follow-up questions, or close the chat.

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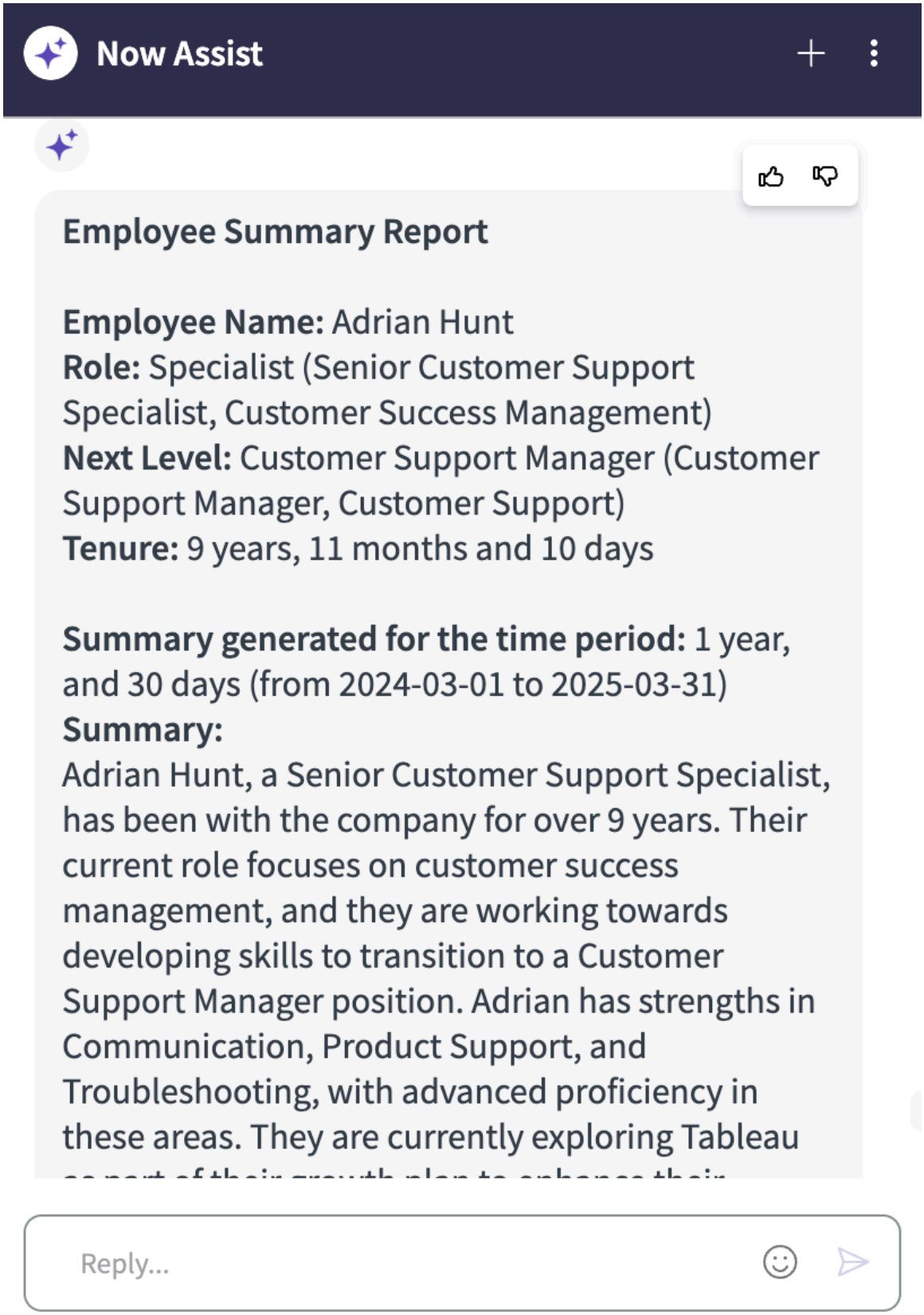

Summarize actions while transferring an HR case

Transfer an HR case to another agent or assignment group by summarizing the actions until hand off. For example, an agent can transfer the case to another agent if the case is incorrectly assigned or needs troubleshooting by another agent or assignment group.

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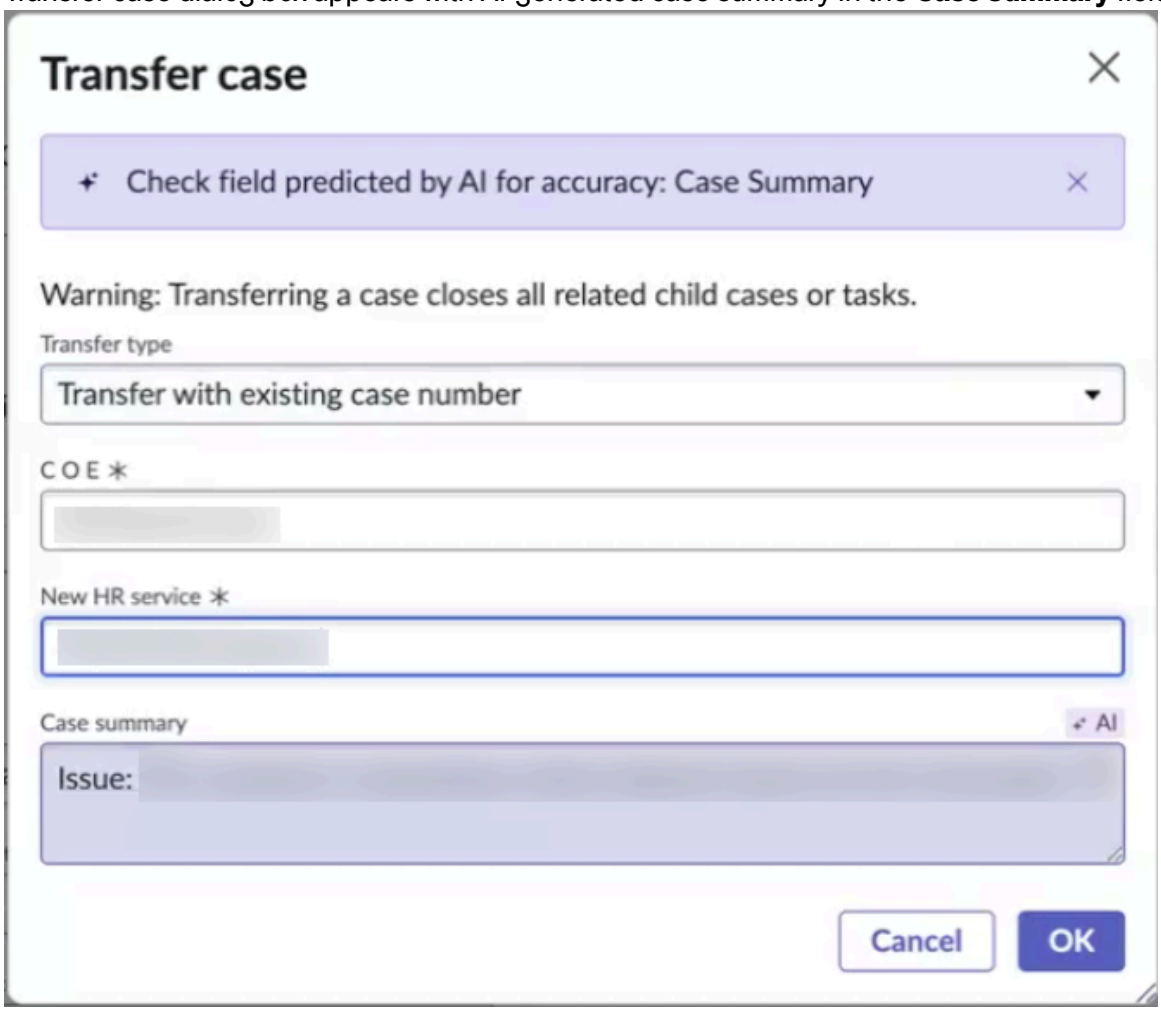
Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. From HR Agent Workspace, open an HR case that is assigned to you.
2. Click the ··· icon at the top right hand corner of the page.
3. Select **Transfer case**.
   Transfer case dialog box appears with AI-generated case summary in the **Case Summary** field.



   a. In the **Transfer type** field, select whether you want to transfer the case with the same case number or with a new case number.
   b. In the **COE** field, specify the HR Center of Excellence (for example, Payroll) to which you want to transfer the case.
   c. In the **New HR Service** field, specify the HR service (for example, Paycheck discrepancy) to which you want to transfer the case.
   d. Review and make any edits to the AI-generated summary in the **Case Summary** field.

      Note: GenAI requires a minimum of 200 words on the case to generate summary.

   e. Click **OK**.

Use Knowledge Graph in Now Assist for HRSD

Create a personalized knowledge model as a Knowledge Graph schema.

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Before you begin

An employee uses Now Assist in Virtual Agent to request an employee visa. The Virtual Agent uses the assigned Knowledge Graph schema to resolve the query and create an Employee Travel Visa Request. Here's an example of how a Knowledge Graph schema assists a Now Assist in Virtual Agent user. Here's an example of how a Knowledge Graph schema assists a Now Assist in Virtual Agent user.

Role required: none

Procedure

1. Navigate to **All** > **Employee Center**.
2. Select **Open chat window**.
3. Query the following: `Need to raise a travel visa request`.
4. Select **Start** below **Employee Self Travel Visa Request**.
5. The query is processed by Knowledge Graph and generates the following fields:
   - Employee name
   - Country of birth
   - Country traveling to
   - Travel start date
   - Trip duration
   - Business justification
6. Fill in the required fields.
   Based on the Knowledge Graph schema selected, the Knowledge Graph searches all edges and nodes to provide available outputs such as **Employee name** and **Country of birth.**
7. Edit the provided information before confirmation if needed.
   When confirmed, the request is processed with minimal effort from the user.

Result

Knowledge Graph leverages the existing information that is available in the internal databases and auto-populates it to reduce efforts while making the entire experience seamless.

Use Now Assist for HR - Galileo Inside to answer HR-related questions

Query the Galileo library to generate a response based on articles and research from The Josh Bersin Company.

Before you begin

Role required: sn_hr_na_galileo.read

Procedure

1. Open a new chat in the Now Assist panel.
2. Enter your question containing any of the following keywords to trigger a response from Galileo Inside:
   - Josh Bersin
   - Galileo
   - HR Practices
   - HR Policy
   - Ask Bersin

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- HR Trends
- HR Guidelines
- HR Framework
- HR Standards

If you do not include one of the keywords, Now Assist provides two responses: the first response is generated by the Now LLM and the second is retrieved from Galileo Inside and includes source citations with links to the original article.

Use the Now Assist panel in HR Agent Workspace

Generate chat and case summaries and resolution notes by using the Now Assist panel in Agent Workspace for HR Case Management or Core UI.

Before you begin

Role required:

- sn_hr_core.case_writer: Agent Workspace for HR Case Management
- sn_hr_core.basic: Core UI

About this task

Procedure

1. Open an HR case that is assigned to you.
2. Select the Now Assist icon .
3. Select a skill from the menu.

Submit an HR request with Gen AI Virtual Agent

Place an HR request using the conversational and streamlined experience offered by Gen AI Virtual Agent.

Before you begin

Role required: None

Procedure

1. Navigate to **All** > **Employee Center**.
2. Click **Open Chat**.
   Gen AI Virtual Agent appears.
3. Enter your query and select the required catalog item.
   For certain catalog items, KB articles are provided for assistance, for some catalog items you will be directed to a different page to place the request, and for certain catalog items Gen AI Virtual Agent creates an HR case for you.

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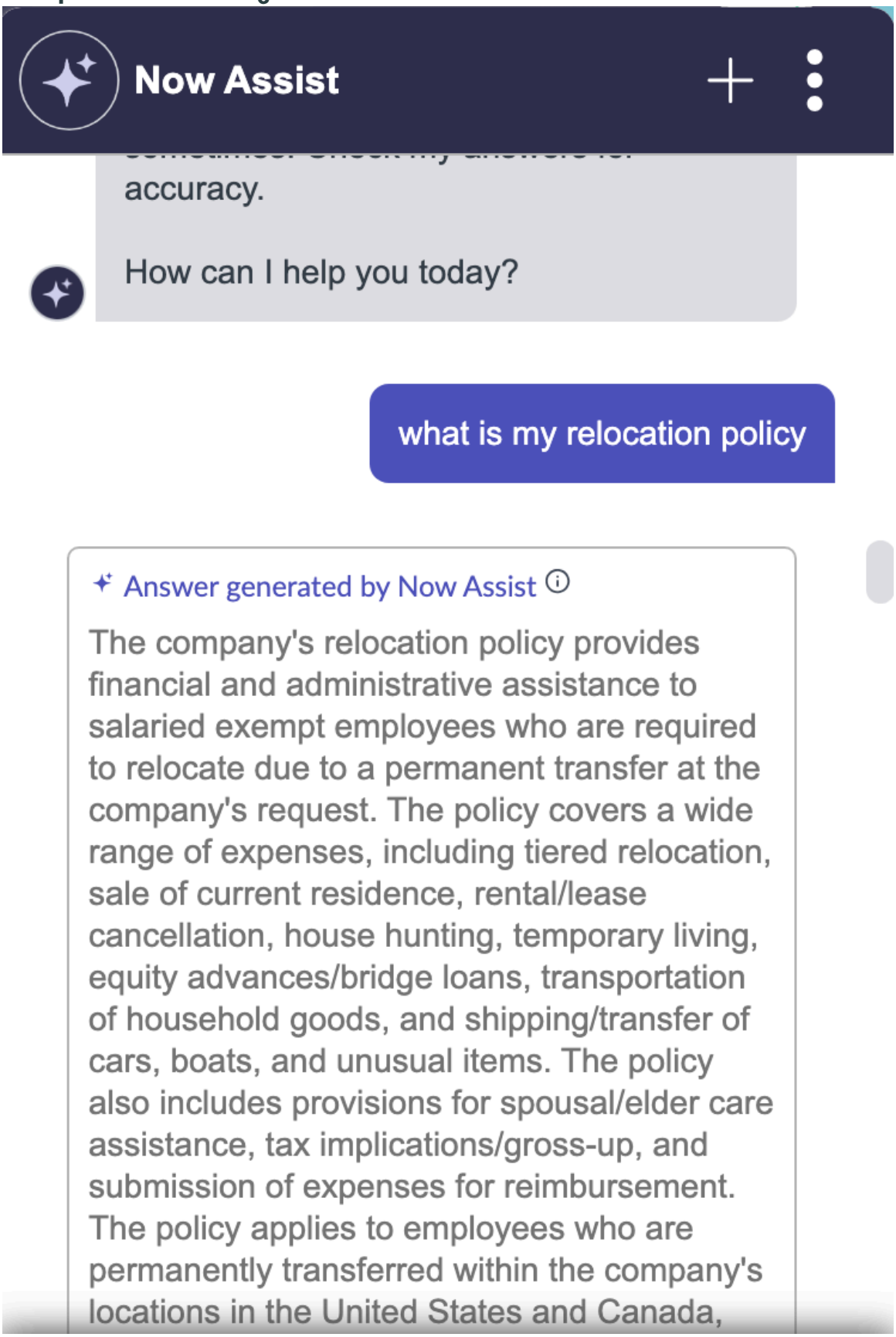
Example: Gen AI Virtual Agent assistance with a KB article



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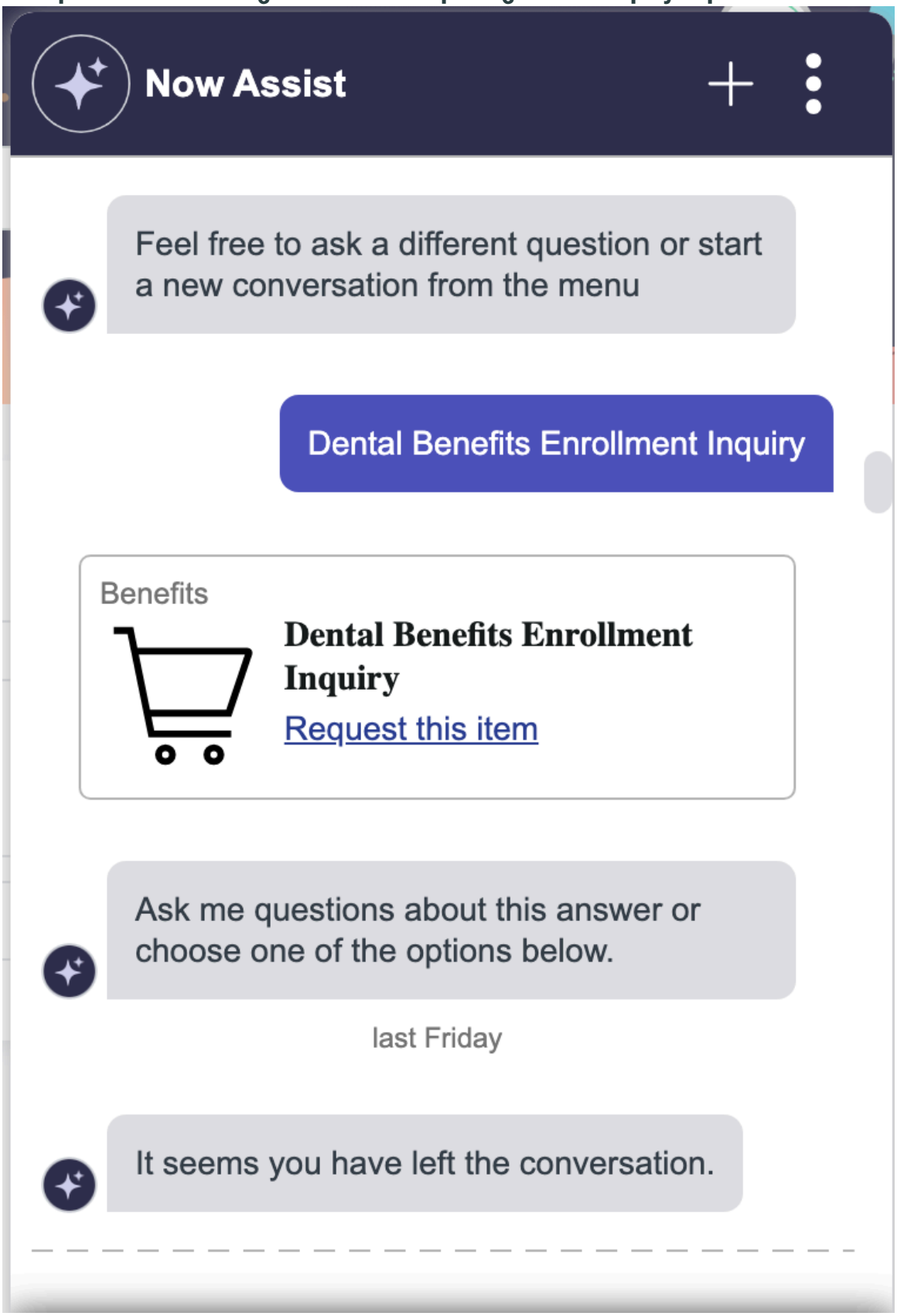
Example: Gen AI Virtual Agent assistance in placing a Dental inquiry request



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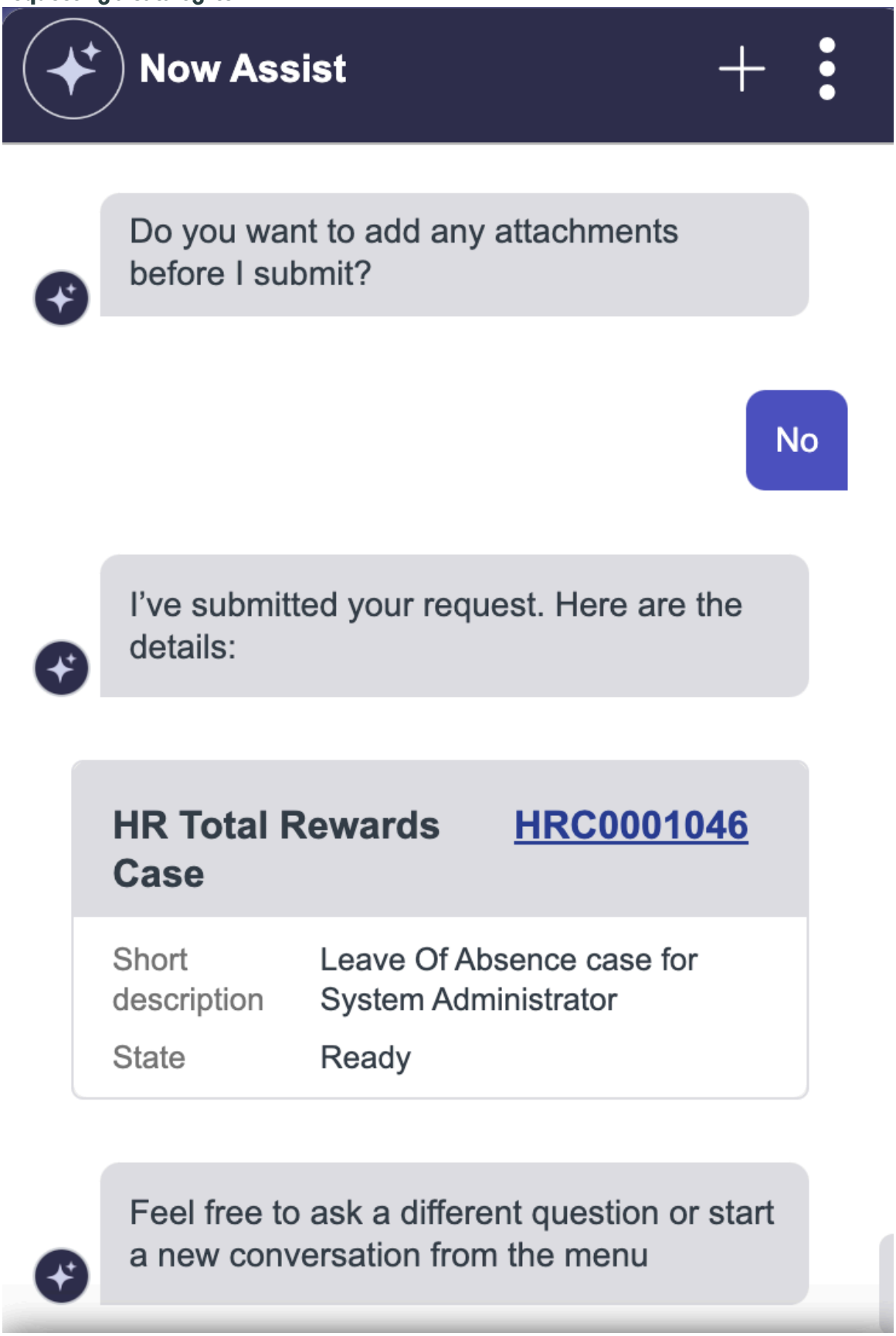
Example: Gen AI Virtual Agent assistance in creating an HR case after requesting a catalog item



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Now Assist for HR Service Delivery (HRSD) integration with Enterprise Service Management Integrations Framework

Enable employees to complete actions in third-party Human Capital Management (HCM) systems with Now Assist Virtual Agent topics in Employee Center.

Now Assist for HRSD integration with Enterprise Service Management Integrations Framework provides:

- Connection to external HCM systems such as Oracle, or Workday with bi-directional data flow. For example, when an employee applies leave through Now Assist in Virtual Agent, the leave gets reflected in the configured HCM system.
- Provider-agnostic abstraction layer for easy set-up and maintenance of existing iHub integrations, when the provider ecosystem is likely to change.
  - Easier way to switch service providers. For example, a company's payroll has been changed from one system to another. Though the underlying system has been modified, the Virtual Agent topic related to Payroll works as is.
  - Allow different provider application for the same use case based on user country. For example, with the same Virtual Agent topic, an employee of one country sends a leave application to Oracle HCM while an employee of another country sends a leave application to Workday.
- Graphical user interface (Integration Provider Mapping) to plugin integration services, single place to discover integration services, and grouping of related integration services.

Set up

Verify that the configuration steps are complete to use the Now Assist for HRSD Virtual Agent topics in Employee Center. For more details, see Now Assist for HRSD Virtual Agent topics.

Now Assist for HRSD Virtual Agent topics

Use the Now Assist Virtual Agent topics in Employee Center to place requests to the configured HCM system, for example, view details of your time-off balance.

Get time off balance

The Get time off balance Virtual Agent topic enables you to view your leave balance from the configured HCM system in Employee Center.

From Employee Center, open a chat window and type in key words, for example, leave balance. The Now Assist generative AI retrieves details from the HCM system and displays your time off balance.

Get User Paychecks

The Get User Paychecks Virtual Agent topic enables you to view your payslip details in Employee Center.

From Employee Center, open a chat window and type in key words, for example, get payslips. After you provide the required details such as start date and end date, your payslip summary, in the form of pay period, gross pay, deductions, and net pay are displayed. A detailed breakdown of deductions is also displayed.

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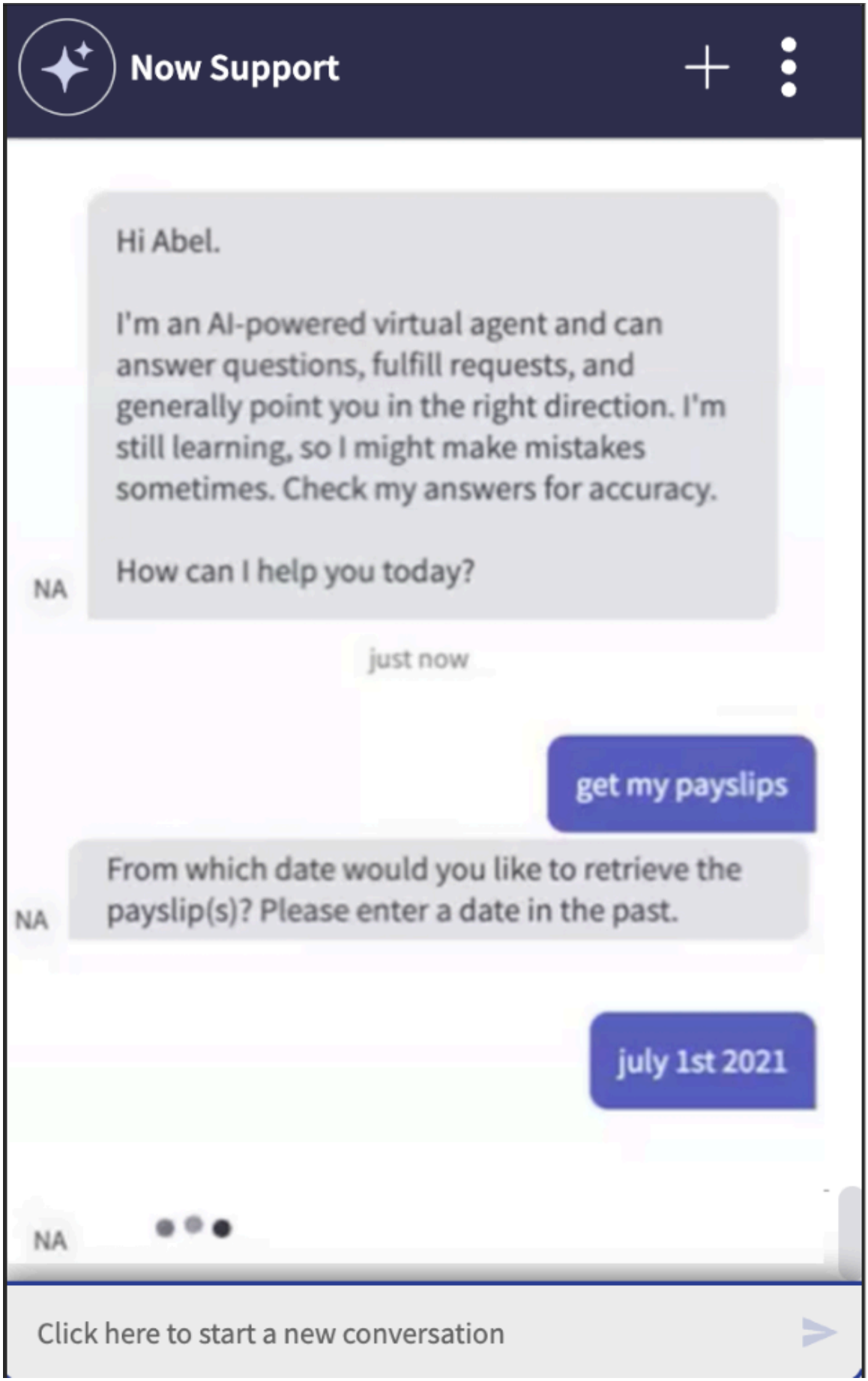

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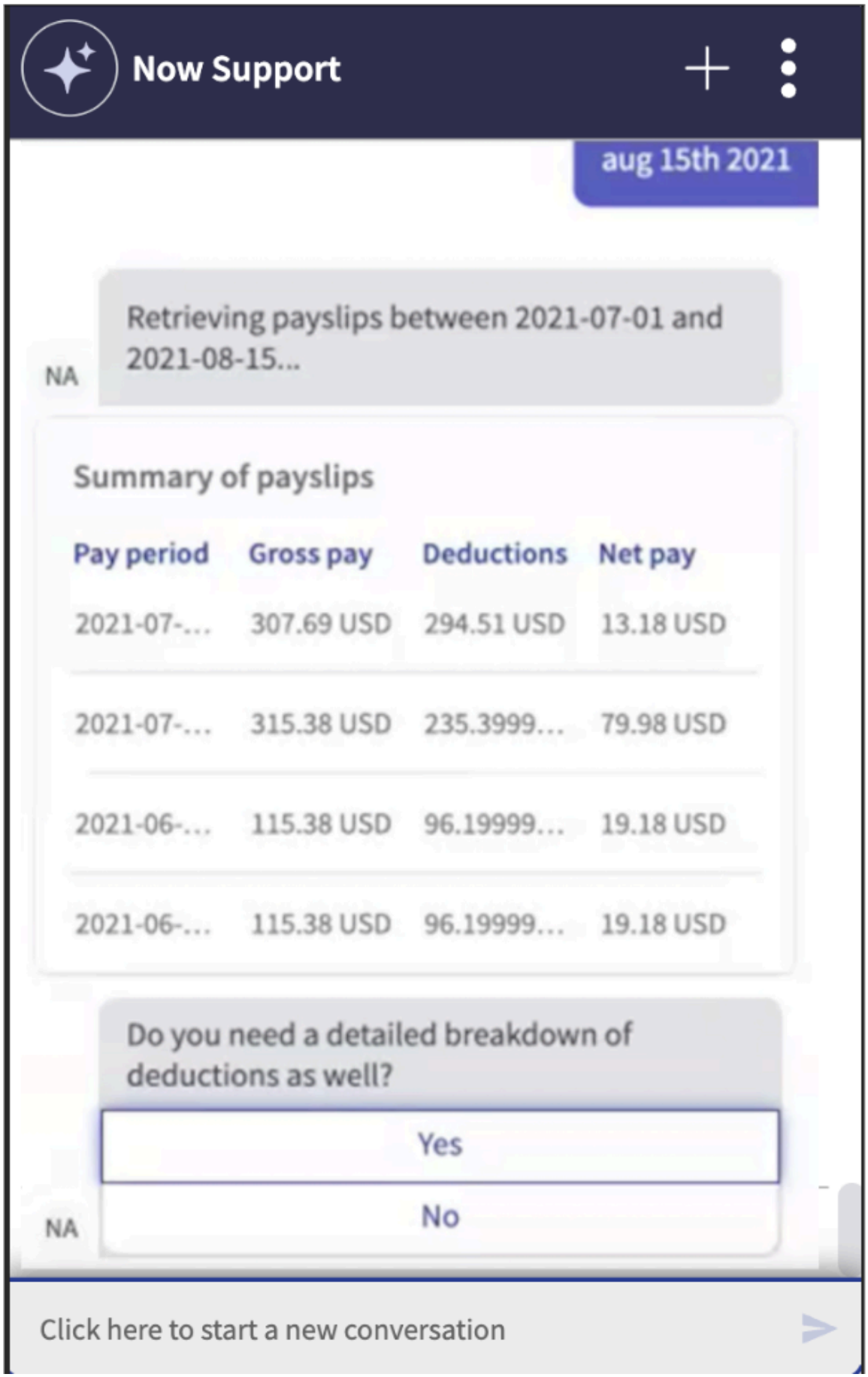

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Lookup Worker Profile

The Lookup Worker Profile Virtual Agent topic enables you to view the profile of a coworker.

From Employee Center, open a chat window and type in key words, for example, worker profile. After you have specified the details of coworkers, worker profile details of one or more users are displayed.

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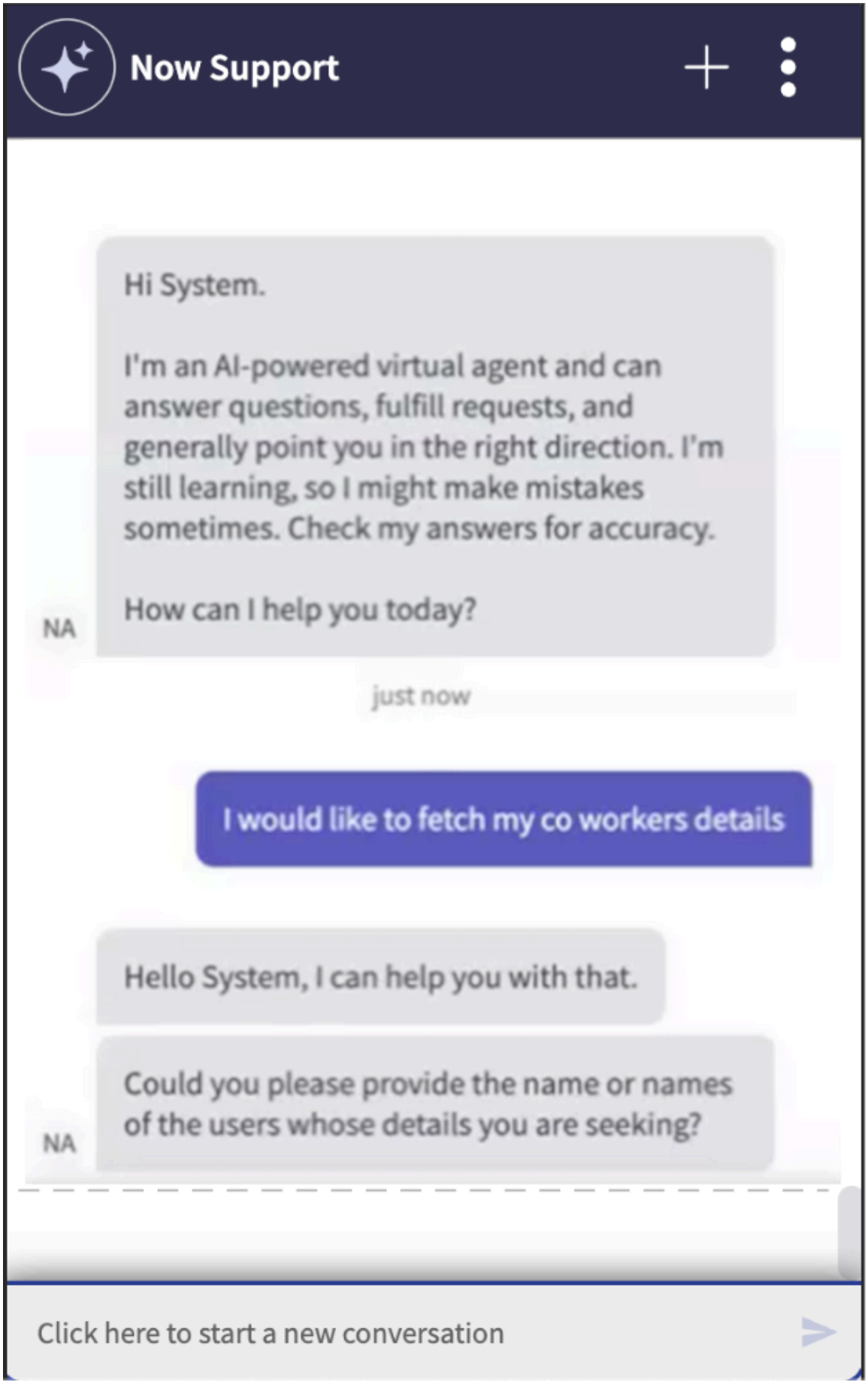

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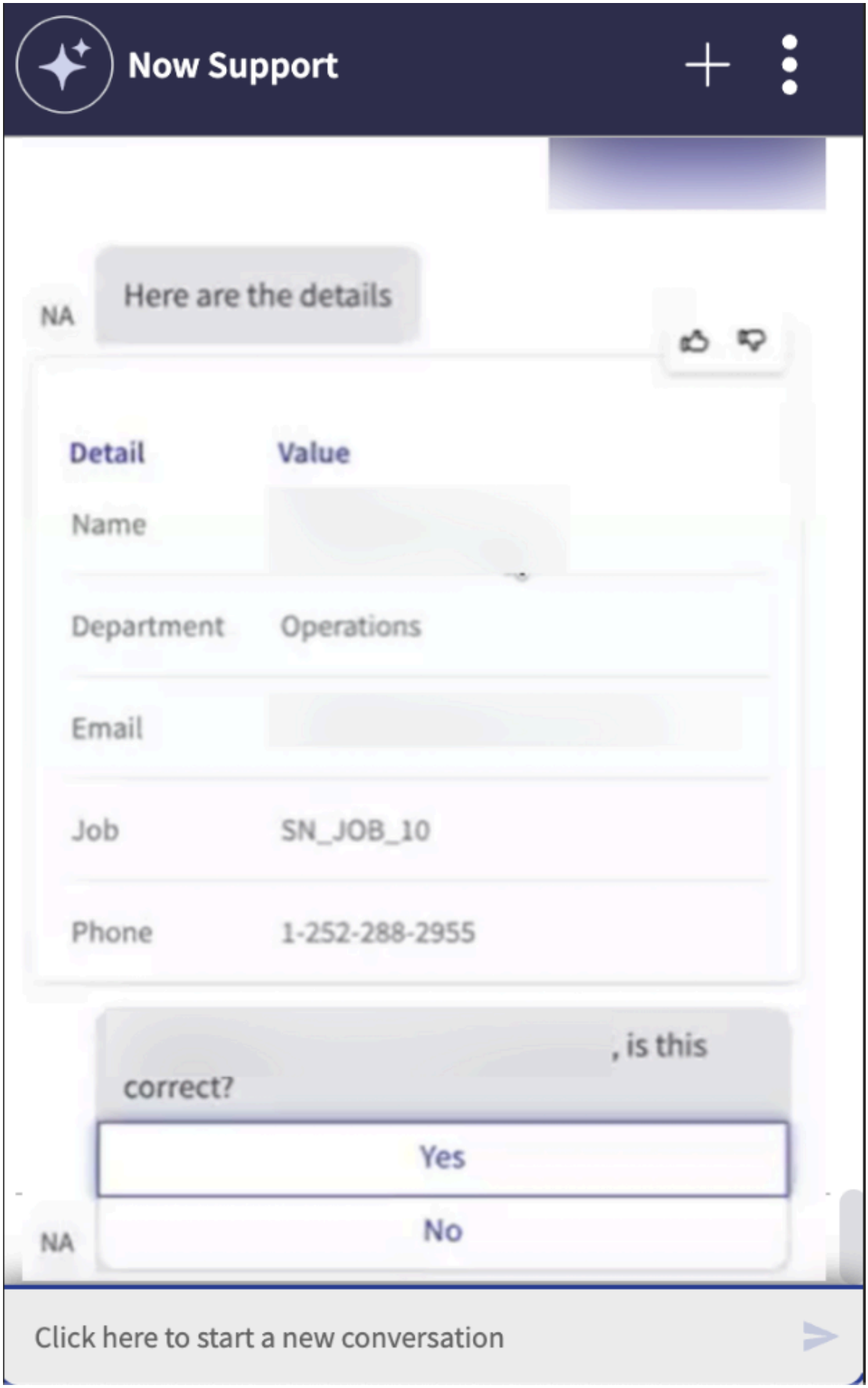

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Request Timeoff

The Request Timeoff Virtual Agent topic enables you to apply leave from Employee Center to the configured HCM system.

From Employee Center, open a chat window and type in key words, for example, request time off. After you have specified required details such as start date and end date, the time off request is sent to the configured HCM system.

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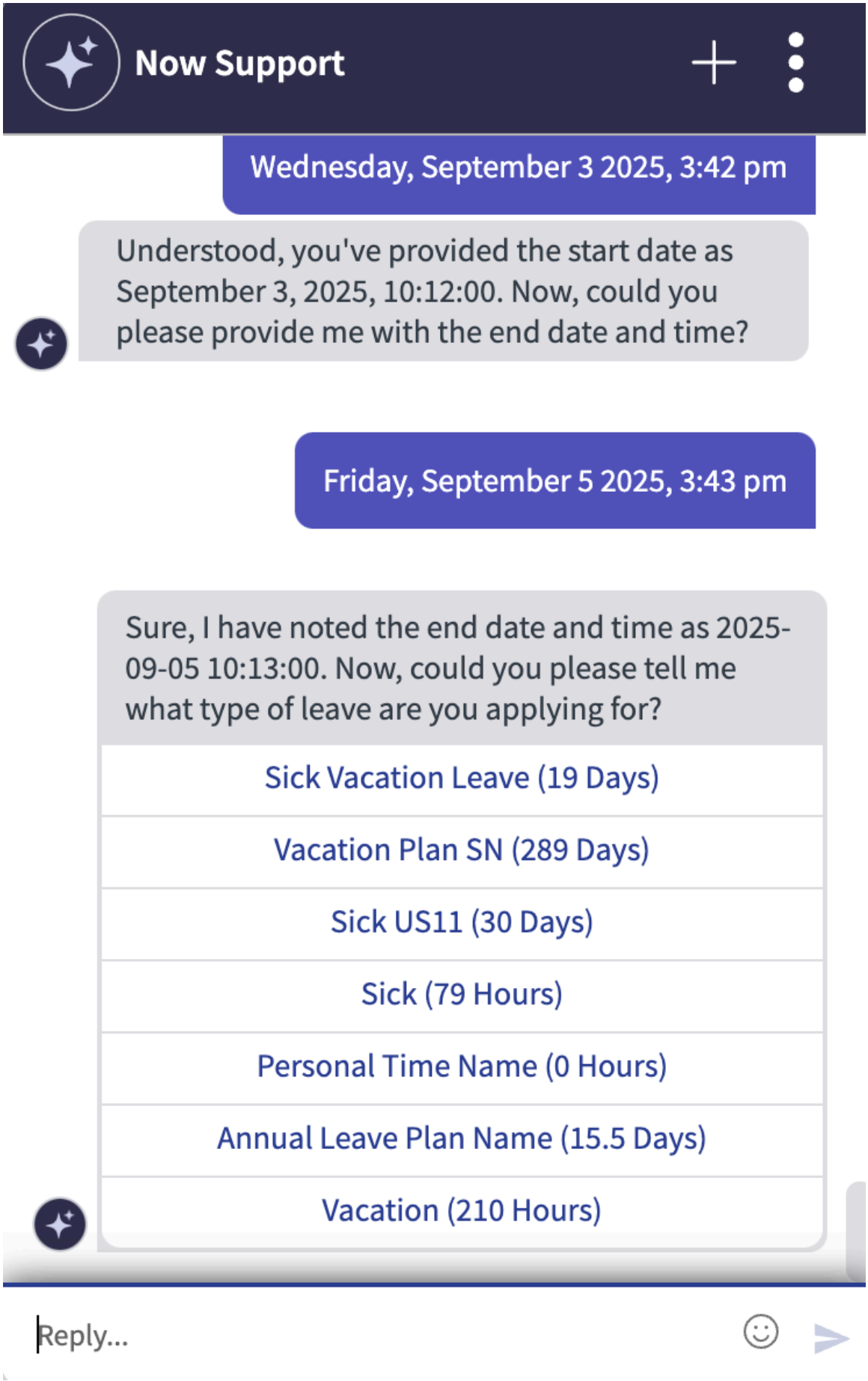

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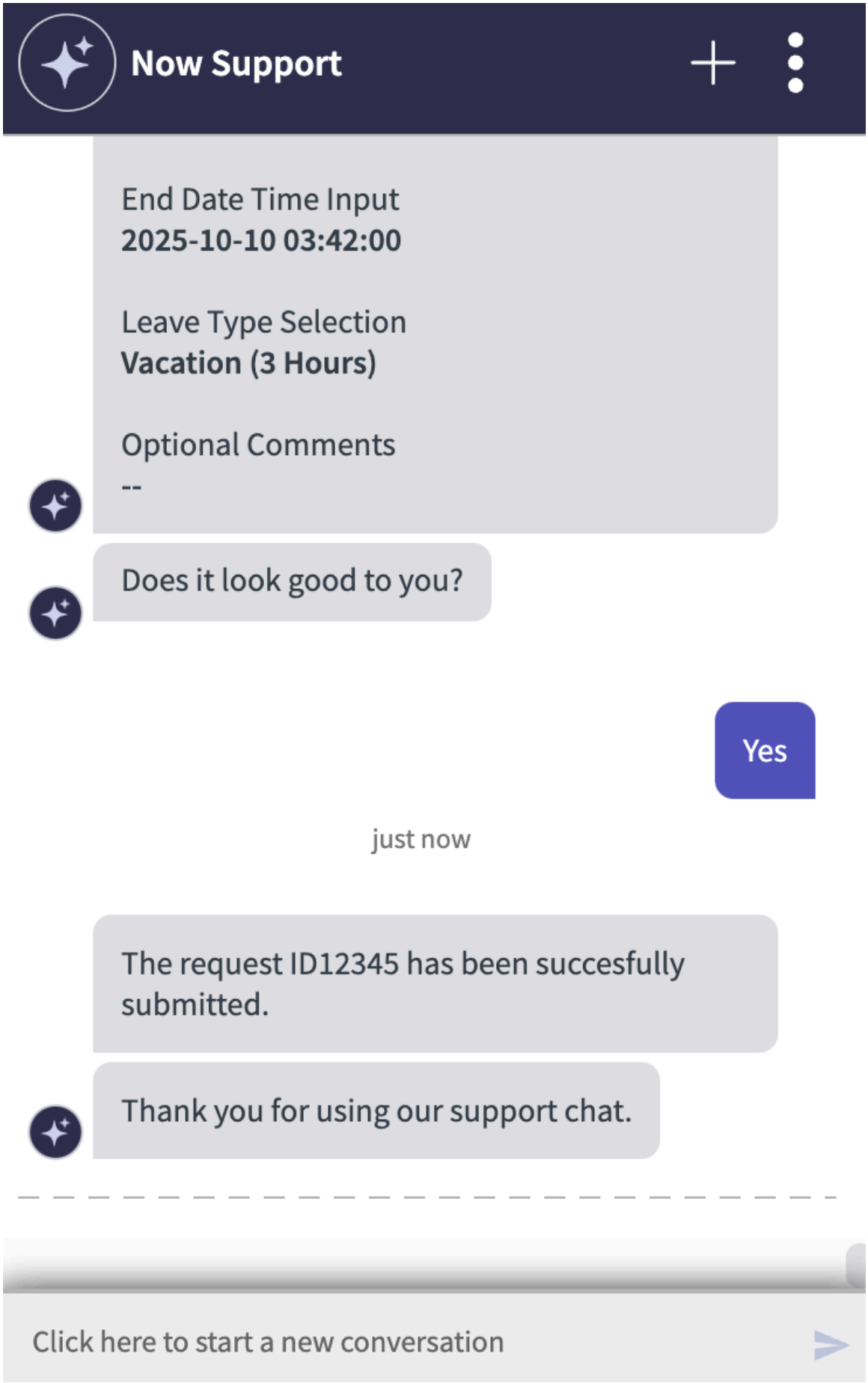

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Add Expense

The Add Expense Virtual Agent topic enables you to submit an expense report from Employee Center to configured HCM system.

From Employee Center, open a chat window and type in key words, for example, add expense. After you have specified the required details such as type of expense, expense currency, expense amount, the expense report is submitted to the configured HCM system.

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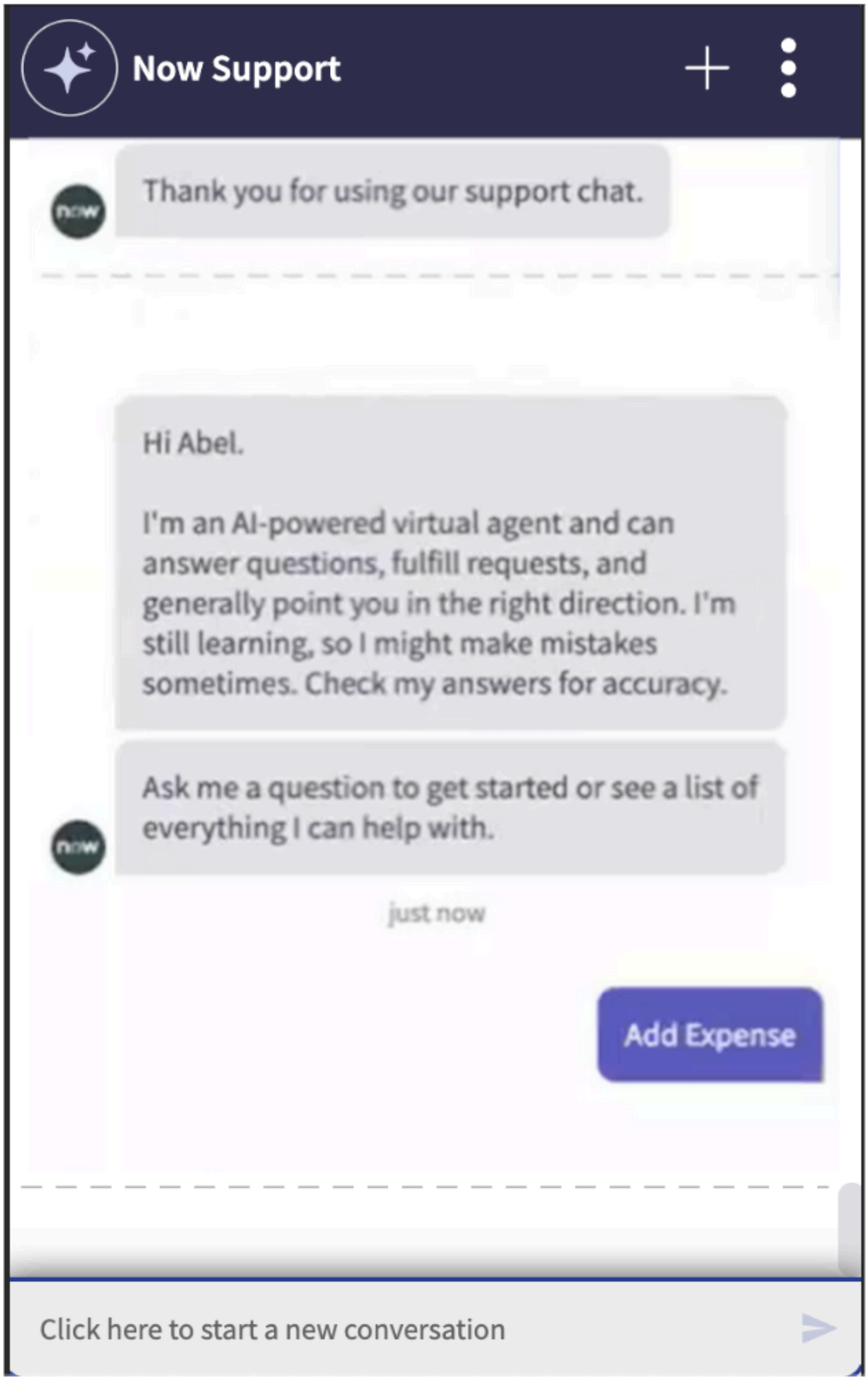

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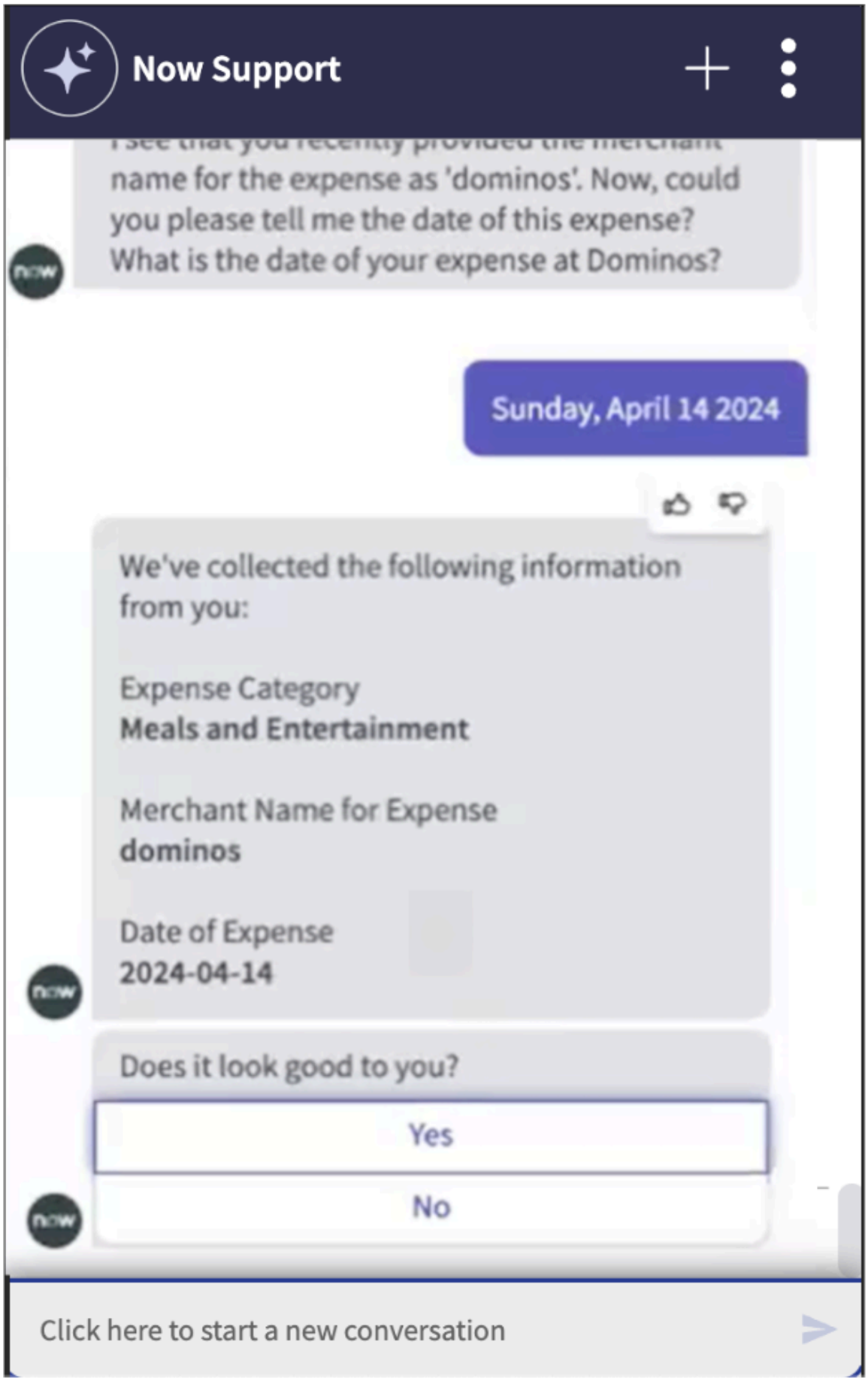

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Get Holiday Calendar

The Get Holiday Calendar Virtual Agent topic enables you to view your holiday calendar from the configured HCM system in Employee Center.

From Employee Center, open a chat window and type in key words, for example, holiday calendar. After specifying the calendar year, the holiday calendar appears in Employee Center.

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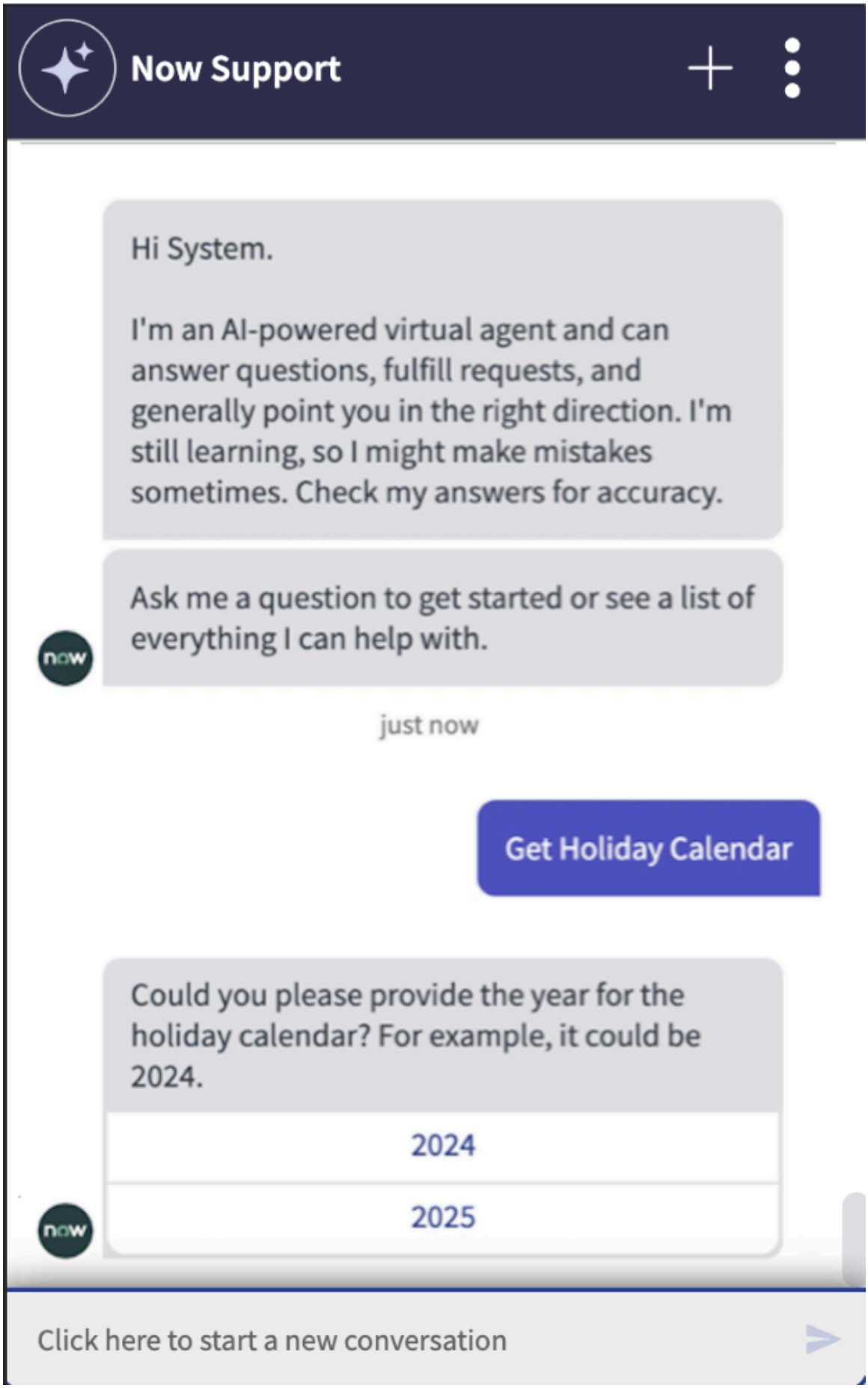

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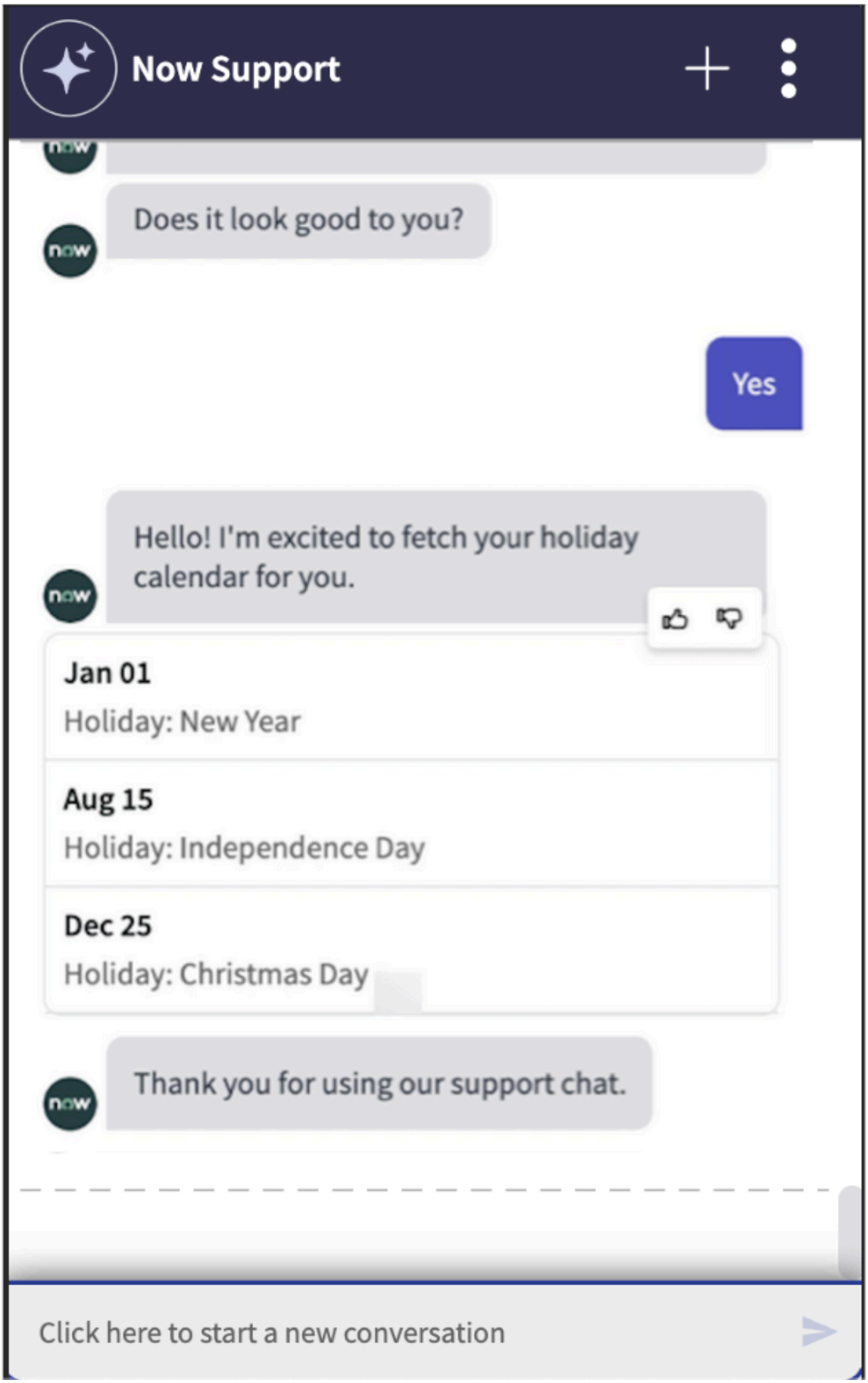

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Get Total Rewards

The Get Total Rewards Virtual Agent topic enables you to view your rewards from the configured HCM system in Employee Center.

From Employee Center, open a chat window and type in key words, for example, rewards. Your rewards are displayed in Employee Center.

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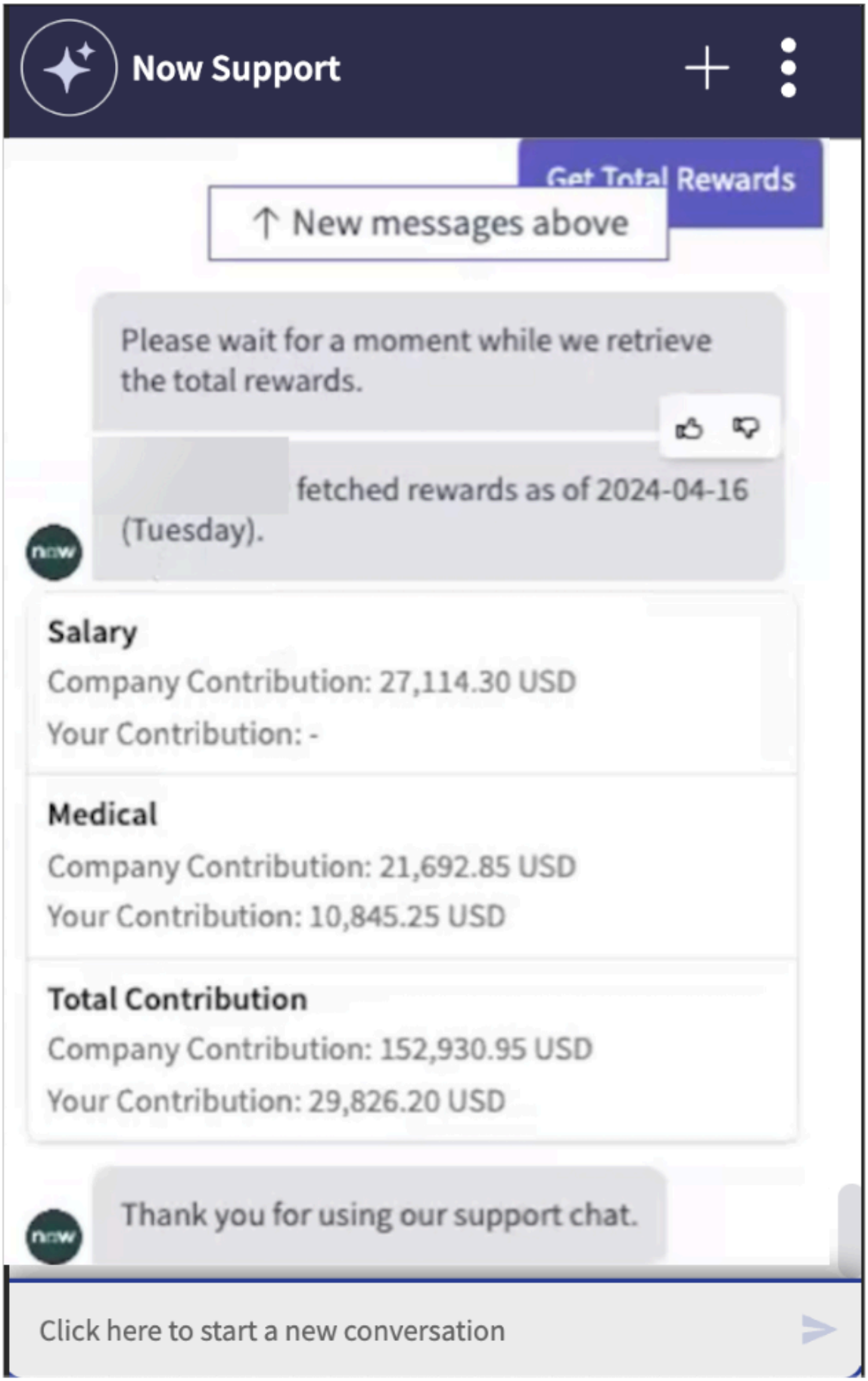

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Lookup Feedback

The Lookup Feedback Virtual Agent topic enables you to view feedback you have received from other employees in Employee Center from the configured HCM system.

From Employee Center, open a chat window and type in key words, for example, Lookup Feedback. Your feedback, if available, is displayed.

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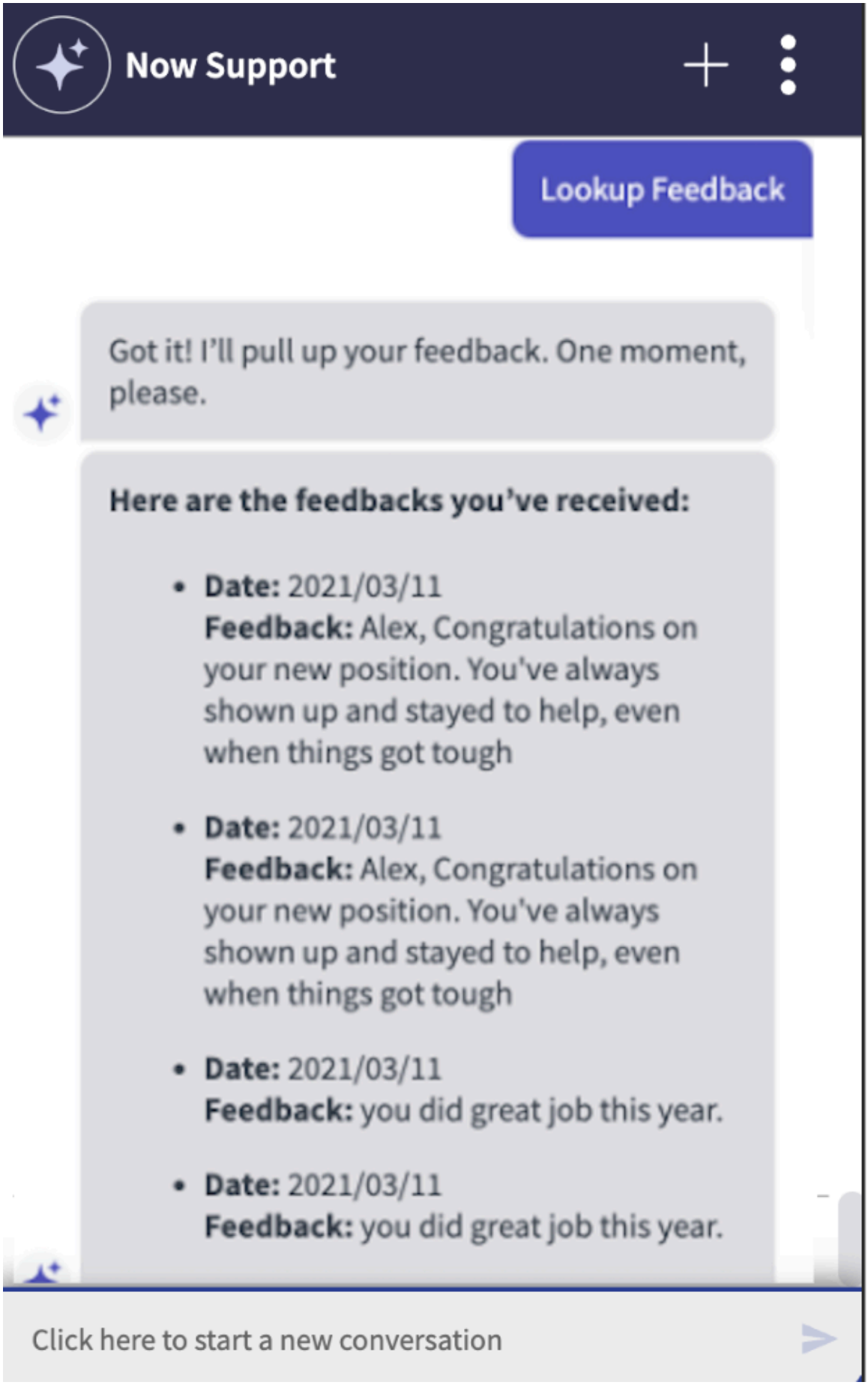

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Lookup Benefit Enrolments

The Lookup Benefit Enrolments Virtual Agent topic enables you to view your benefit programs such as medical, 401(k) and so on, in Employee Center from the configured HCM system.

From Employee Center, open a chat window and type in key words, for example, Lookup Benefit Enrolments. Your benefit programs, if available, are displayed.

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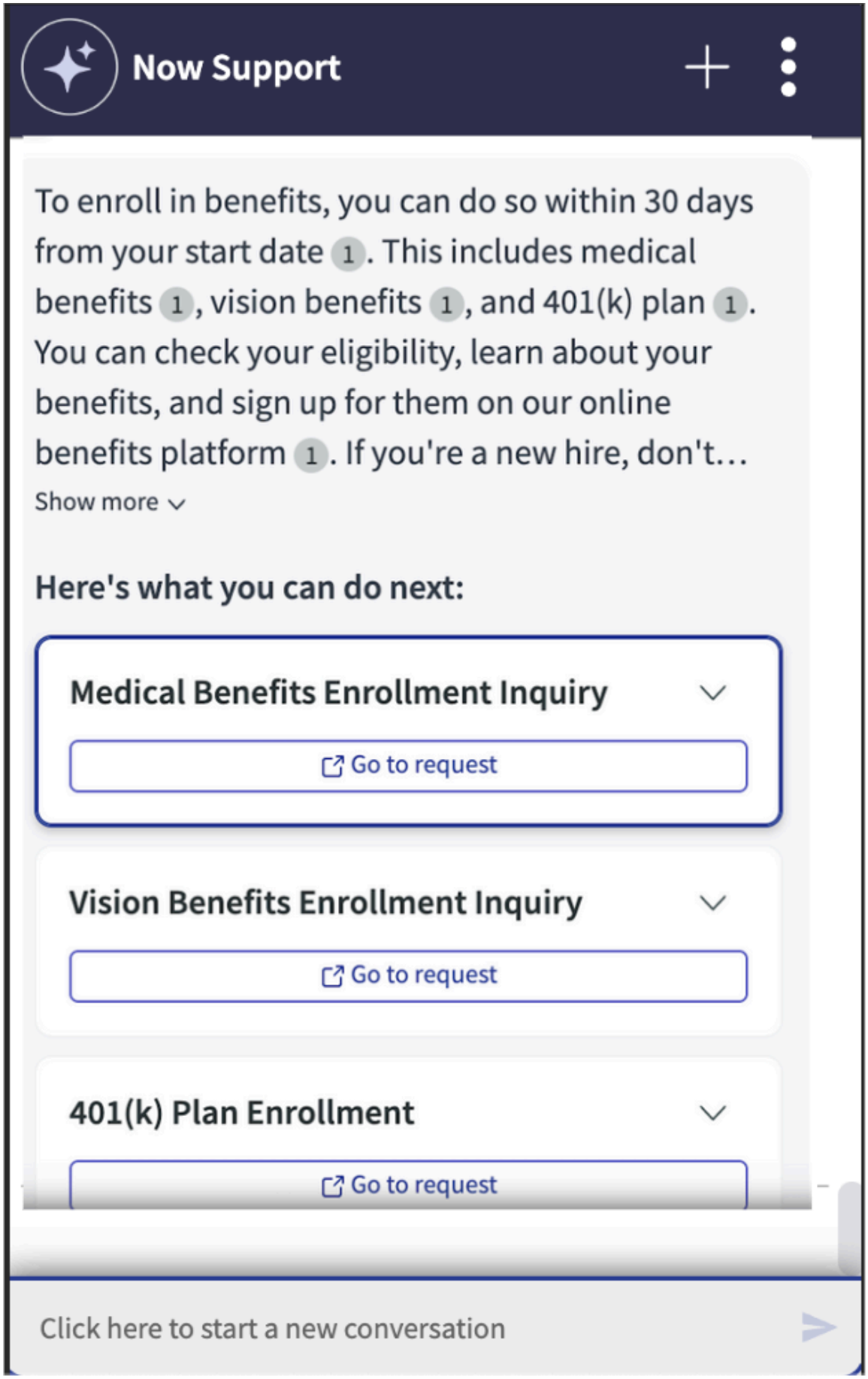

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Update personal details

You can update personal details in Virtual Agent using one of the following topics in Employee Center from the configured HCM system.

- Update Address
- Update Blood Type
- Update Date of Birth
- Update Email Address
- Update Phone Number

Analyze sentiments in Now Assist for HR Service Delivery (HRSD)

Agents can prioritize cases based on requester sentiment and the reasoning behind it in the Now Assist for HR Service Delivery (HRSD) application.

Before you begin

Role required: sn_esm_agent role

Procedure

1. Navigate to the case or case form in the Core UI or in CSM Configurable Workspace.

To	Do this
Navigate in Core UI	**a.** Go to **All** > **Cases** The case list view appears. You can analyze the Sentiment and Sentiment trend for the case list. **b.** Select a case. The case form view appears. **c.** In the Sentiment field, select the information icon ⓘ to see the reasons for the sentiment.
Navigate in CSM Configurable Workspace	**a.** Go to **Workspaces** > **CSM Configurable Workspace** **b.** Select the List icon ☰. **c.** Go to **Cases** > **Open** The CSM Configurable Workspace list view appears. **d.** Select a case.

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To	Do this
	The CSM Configurable Workspace form view appears. **e.** Select the information icon to see the reasons for the sentiment.

2. **Optional:** In Core UI or CSM Configurable Workspace list view, you can sort the cases based on the sentiment and the sentiment trend.
3. **Optional:** Manually refresh a sentiment.
   a. In the Core UI or in CSM Configurable Workspace, enter a comment in the Additional Comments field.
   b. In the CSM Configurable Workspace interface, a red dot appears on the information icon next to the sentiment.
   c. Select the information icon and then select the refresh icon to see the updated sentiment and sentiment trend.

Reference for Now Assist for HR Service Delivery (HRSD)

Reference topics provide additional information about user roles, tables, and default configurations in Now Assist for HR Service Delivery (HRSD).

Sensitivity detection filters mapping

The `sys_gen_ai_filter` table includes eight out-of-the-box filters that determines which topics are regarded as sensitive. Each filter is mapped to an HR service that is used to create a case and a chat queue.

The filter to service and queue mapping is set by the `getFilterMetaData` function in the `SensitivityDetectionVAUtilSNC` script.

To modify the HR service used to create a case, update the HR service sysid that is associated to the filter in the `filterMap` object of the function.

To modify the live agent chat queue, update the text that is associated to the `queueType` object. The value is used to set the `liveagent_esc_pre_chat_category`.

Modify the condition that is associated with your `awa_queue` record so that you can check the value in this field.

Now Assist for HR Service Delivery (HRSD) Generative AI filters mapping

Filter	HR Service	Queue
Compensation and Career Advancement	Request accommodation	Employee relations
Employee Health Concerns	Request accommodation	Employee relations
Employee Personal issues	Report misconduct	Employee relations
Ethics, Safety, and Employee Behavior and workplace practices	Report misconduct	Employee relations

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Now Assist for HR Service Delivery (HRSD) Generative AI filters mapping (continued)

Filter	HR Service	Queue
Performance, evaluation, and Support Concerns	General	General
Termination disputes & Layoff Concerns	Request accommodation	Employee relations
Workplace misconduct: Workplace harassment, Violence, and discrimination	Report misconduct	Employee relations
Workplace Substance Abuse and Support	Report misconduct	Employee relations

Components installed with Now Assist for HR - Galileo Inside

Information about the roles and scheduled jobs that are installed.

Roles

Role	Description
sn_hr_na_galileo.admin	Is auto-assigned to the sn_hr_gen_ai_helper.admin role. Grants administrative access to the Galileo data store.
sn_hr_na_galileo.read	Enables users to receive Now Assist responses containing Galileo data

Scheduled jobs

Scheduled job name	Description
Fetch and Index Galileo data	Retrieves data from the Josh Bersin company. The admin first manually executes the scheduled job to begin the initial indexing. Subsequently, the system runs the scheduled job monthly to retrieve new data.

Components installed with voice

Information about the roles, tables, and scheduled jobs that are installed with Voice Agents.

AI voice agent roles

The following table lists the roles installed with the Voice for Now Assist plugin.

Roles	Description
sn_voice_aia.admin	Provides access to agents configuration flow

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Roles	Description
sn_hr_voice_aia.admin	Provides access to HR Voice AI agents configuration
sn_voice_aia.guest	Enables employees to use AI voice agents without authentication
sn_voice_aia.integration	Enables access to integrations such as Oracle

AI voice agent attributes

The AI voice agent attributes enable you to configure the authentication functionality for AI voice agents. Navigate to **All** > **System Definition** > **Tables** and search for Now Assist Deployment Config Attributes table to view the attributes.

The following table lists the attributes related to AI voice agent configuration.

Attribute	Description
voice_max_retries	The maximum number of retries allowed for successful authentication before the user account is locked. The default value is 3.
voice_minutes_account_is_locked	The number of minutes the user account is locked for, following maximum retries. The default value is 1440 minutes.

AI voice agent system properties

The following table consists of system properties to set up AI voice agents.

Property	Description
sn_aia.enable_voice_agent_setup	The system property to enable AI voice agents. Set the value of the property to true to enable AI voice agents on the instance.

Hiring Experiences

Hiring Experiences is a suite of applications that is designed to streamline and enhance the entire hiring journey for hiring managers, recruiters, interviewers, and applicants.

Explore	Configure	Integrate
		
Learn about the Hiring Experiences suite.	Plan and configure the implementation of your Hiring Experiences suite.	Extend Hiring Experiences capabilities by integrating with other applications.

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Reference  Important reference information about Hiring Experiences.	Hiring tab  Learn about the Hiring tab application and how to use it.	Recruitment Workspace  Learn about the Recruitment workspace application and how to use it.
Interview Management  Learn about the Interview management application and how to use it.	Applicant Center  Learn about the Applicant Center application and how to use it.	Opportunity Marketplace  Learn about the Opportunity Marketplace application and how to use it.
	Talent Profile  Learn about the Talent profile application and how to use it.	

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Hiring Experiences

Hiring Experiences provides a multi-department, employee, and applicant experience portal to attract and retain top talent. Build your brand, increase user satisfaction, and enhance productivity across the enterprise.

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Hiring Experiences overview

The Hiring Experiences suite streamlines & optimizes the hiring journey of your organization using ServiceNow AI Platform®, automation, & configurable workflows.

The Hiring tab allows hiring managers to manage their end-to-end hiring journey from the unified experience of Employee Center. It offers intuitive hiring workflows and seamless collaboration with recruiters to help make faster, more informed hiring decisions.

Recruiters gain full visibility through a centralized workspace that enables them to efficiently plan, prioritize, and manage job requisitions, applications, and interviews, offering deep data-driven insights and contextual actions within the workflow.

Interview capabilities empower hiring teams to manage evaluations efficiently and swiftly throughout the entire process, from interview setup to scheduling & support, to make data-informed hiring decisions.

Applicants feel connected and engaged through a password-free login and a personalized Applicant Center experience that supports them throughout their hiring process, enabling them to explore, understand, and take charge of their journey.

Applications in the Hiring Experiences suite

The Hiring Experiences suite consists of the following applications that work together to streamline and enhance the hiring process.

Hiring Experiences applications

Hiring tab	The Hiring tab is a centralized hub for hiring managers, designed to facilitate efficient stakeholder collaboration and drive a streamlined and effective hiring process.
Recruitment Workspace	The Recruitment workspace centralizes job requisition tracking, boosts hiring efficiency, enhances applicant engagement, and enables recruiters to take smarter decisions with talent insights.
Interview Management	The Interview management application simplifies and optimizes the interview process through structured workflows, flexible scheduling options, automated reminders, and streamlined feedback collection, enabling faster and more collaborative hiring.
Applicant Center	Applicant Center offers a streamlined and tailored experience for applicants through a dedicated portal, enhancing their overall recruitment experience.
Talent Profile	Talent profile provides an aggregated view of internal and external talent types, enabling quicker hiring decisions by consolidating information on applicants, employees, contingent workers, and alumni in one place.
Opportunity Marketplace	Opportunity Marketplace provides employees an intuitive experience to explore career opportunities.

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Hiring Experiences users

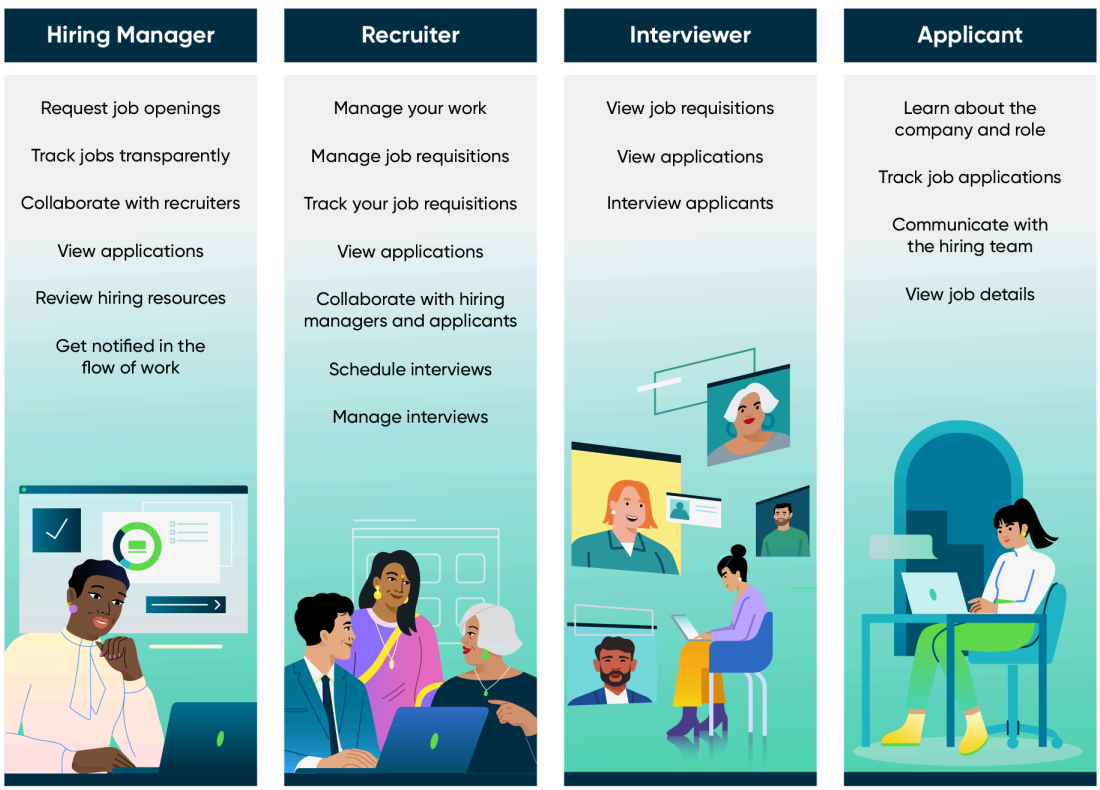
Users

User	Description
Hiring manager	Hiring managers request job openings, track jobs, collaborate with recruiters, view and compare applications, provide feedback, and so on.
Recruiter	Recruiters can manage job requisition, view applications, collaborate with hiring managers and applicants, schedule and manage interviews.
Interviewer	Interviewers can view the job requisitions assigned to them, view applications, and interview applicants.
Applicant	Applicants can learn more about the company, track their job applications, view job details, and communicate with the hiring team.

Hiring Experiences workflow

The infographic displays the different roles that the Hiring Experiences suite caters to.

Hiring Experiences benefit summary



1. The hiring managers can request job openings, track jobs, collaborate with recruiters, view applications, and so on.
2. The recruiters can manage job requisition, view applications, collaborate with hiring managers and applications, schedule and manage interviews.

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3. The interviewers can view the job requisitions assigned to them, view applications, and interview applicants.
4. The applicants can learn more about the company, track their job applications, view job details, and communicate with the hiring team.

Hiring Experiences is designed for intelligent and optimized workflows and experiences that connect all the hiring stakeholders within a transparent and collaborative process.

What to explore next

To learn more about configuring and using Hiring Experiences, see:

- Configuring Hiring Experiences
- Integrations for Hiring Experiences
- Hiring Experiences reference
- Hiring tab
- Recruitment Workspace
- Interview Management
- Applicant Center
- Opportunity Marketplace
- Talent Profile

Configuring Hiring Experiences

Install and configure the Hiring Experiences suite for optimal usage according to your organizational requirement.

Configuration overview

- Plan your installation

  Know the required plugins and the dependencies to configure your Hiring Experiences suite optimally.

- Install Hiring Connector for third party integration

  Install the Hiring Connector application to integrate third party applications with your Hiring Experiences suite.

- Modify purge policies to clean up data

  Modify the default data purge policies and create rules to archive and delete data for applications in the Hiring Experiences suite, as needed.

- Configuring Hiring

  Set up the Hiring tab application within the Manager Hub to provide a seamless hiring workspace for hiring managers.

- Configuring Recruitment Workspace

  Set up the Recruitment workspace and create an integrated workspace and a collaborative communication channel between recruiters and the other hiring personas.

- Configuring Interview Management

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Set up the Interview management application to get started with your interview scheduling and management journey.

- Configuring Applicant Center

  Set up the Applicant Center for your applicants to have a personalized portal for all their queries and communication.

- Configuring Talent profile

  Set up the Talent profile to attract and manage top talent from the industry.

- Install and configure Opportunity Marketplace

  Set up the Opportunity Marketplace application.

Plan your installation

Identify the requirements and plan your installation of the Hiring Experiences suite.

Dependencies of Hiring Experiences

The following plugins are required to use all the features in the Hiring Experiences suite.

Hiring Experiences has the following major components:

- Hiring tab (sn_ta_hiring_mgr)
- Recruitment workspace (sn_ta_recruiter)
- Applicant Center (sn_ta_applicant)
- Hiring Connector (sn_ta_connector)
- Talent Profile (sn_ta_tp)
- Interview Management (sn_ta_int_mgmt)

When you install all the plugins within the Hiring Experiences suite, the following plugins are installed by default.

- Employee Center Pro (sn_ex_sp_pro)
- Manager Hub (sn_mh)
- Employee Profile (com.sn_employee)
- Content Experiences (sn_ca)
- Skills Foundation (sn_skills_int)
- Finance Common Architecture (sn_fin)
- Hiring Core (sn_ta_hiring_core)
- Time Limited Authentication (com.snc.authenticate.time_limited_authentication)
- Explicit roles (com.glide.explicit_roles)

Install Hiring Connector for third party integration

You can install the Hiring Connector application (sn_ta_connector) to integrate with third party applications if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Hiring Connector application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Tables and Store applications are installed with Hiring Connector.

For more information, see Components installed with Hiring Connector.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Hiring Connector application (sn_ta_connector) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Modify purge policies to clean up data

Modify the default data purge policies to clean up data according to your organizational requirement.

Before you begin

Role required: sn_ta_hiring_core.admin/ sn_ta_tp.talent_profile_admin

Procedure

1. Navigate to **All** > **Automated Test Framework (ATF)** > **Administration** > **Table Cleanup**.
2. Select one or more of the following tables to modify the default auto flush settings one at a time.

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Default auto flush settings

Table	Matchfield type	Data retention
sn_ta_hiring_core_job_application [sn_ta_hiring_core_job_application]	sys_updated_on	3 years
sn_ta_tp_talent_profile [sn_ta_tp_talent_profile]	sys_updated_on	3 years
sn_ta_hiring_core_job_applicant [sn_ta_hiring_core_job_applicant]	sys_updated_on	3 years
sn_ta_tp_talent_pool [sn_ta_tp_talent_pool]	sys_updated_on	3 years
sn_ta_hiring_core_job_description [sn_ta_hiring_core_job_requisition]	sys_updated_on	3 years
sn_ta_tp_talent_profile [sn_ta_tp_talent_profile]	job_applicant.consent_updated	1 year

For a description of the auto flush form field values, see Autoflush form.

Rules to archive data

Create rules to archive and delete data according to your organizational policy.

You have the option to archive and delete data after a specified time, instead of setting up purge policies.

Create archive and destroy rules to archive data and delete the archived records.

For more information, see Data archiving.

Cascade rules for cleaning data

Cascade rules determine a thorough cleanup of the outdated data and its related counterparts at source from the system.

Hiring Experiences cascade rules

Scenario	Outcome
A job requisition is deleted.	All the job applications for that job requisition are deleted.
A job requisition is deleted.	All the job postings for that job requisition are deleted.
A job requisition is deleted.	All the associated records within the hiring team for that job requisition are deleted.
A job application is deleted.	All extracted skills associated with the job application are deleted.
A job application is deleted.	All the details from the applicant profile are deleted.

Integrations for Hiring Experiences

Integration enables expansion of features and capabilities among the applications.

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Integrate with your ATS

Integrate your Hiring Experiences environment with your preferred ATS to create a seamless hiring workflow.

Send job requisitions to the ATS

Send the job requisitions to your integrated ATS to get posted on the job boards.

Set the trigger conditions to send the job requisitions

Create an integration flow to send the job requisitions to the ATS when it is in **Ready** state. You can re-configure the state when the requisition is sent to your integrated ATS.

Create integration flow for ATS

Create the integration flow with your preferred ATS to send job requisition data to the ATS.

Use Integration Hub

Use the Integration Hub to integrate Hiring Experiences with your preferred ATS. For more information, see Integration Hub spokes.

Supporting actions

Create the supporting actions after the integration is done to establish a channel between your ATS and Hiring Experiences. The supporting actions vary depending on your ATS.

Export and import data manually

You can export the list of job requisitions from the Job Requisition [sn_ta_hiring_core_job_requisition] table and imported the data to an ATS manually.

For more information, see Exporting data.

Upload job requisitions using import sets

Bring all your historic job requisition data from your ATS to your ServiceNow instance with the import sets.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load data**.
2. On the form, fill in the fields.
   For more information on the field descriptions, see Load data form.

   Note: In the **Import set table** field, select **Existing table** and add the Job Requisition Staging [sn_ta_connector_job_requisition_staging] table.

   The table is available with the base system.

3. Select **Submit**.

   You can download the import set template too. For more information, see Download an import template.

4. In the Next steps section, select **Run Transform** related link.

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5. In the specify Import set and Transform map, select **Transform**.
6. Select **Transform history** related link to check for errors in the **Import set Row Errors** tab.

Result
The job requisition table is updated with the imported data.

Receive application and applicant data from ATS

Import the application and applicant details from your integrated ATS into the system for processing.

Create Integration Flow to pull data from ATS

Create the integration flow with your preferred ATS to pull in data.

Use Integration Hub

Use the Integration Hub to integrate Talent Acquisition with your preferred ATS to receive the data on the application and applicant details. For more information, see Integration Hub spokes.

Supporting actions

Create the supporting actions after the integration is done to establish a channel between your ATS and Talent Acquisition. The supporting actions vary depending on your ATS.

Use Import sets for data configuration

Use import sets to get the job application data, if you don't have an integrated ATS. For more information, see Upload job applications using import sets.

Upload job applications using import sets

Upload job application data from your ATS to your ServiceNow instance at regular intervals using import sets.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load data**.
2. On the form, fill in the fields.
   For a description of the field values, see Load data form.

   Note: In the **Import set table** field, select **Existing table** and add Job Application Staging [sn_ta_connector_job_application_staging] table.

   The table is available with the base system.

3. Select **Submit**.

   You can download the import set template too. For more information, see Download an import template.

4. In the Next steps section, select **Run Transform** related link.
5. In the specify Import set and Transform map, select **Transform**.
6. Select **Transform history** related link to check for errors in the **Import set Row Errors** tab.

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Result
The job application list is updated with the imported data.

Configure Microsoft Outlook integration

Set up Microsoft Outlook to integrate meeting invites from Hiring Experiences with your Outlook account.

Before you begin
Role required: admin

Procedure

1. Set up the Microsoft Exchange Online spoke.
   For more information, see Microsoft Exchange Online Spoke.
2. In the navigation filter, enter `sys_properties.list`.
   The System Properties [sys_properties] table is displayed.
3. Locate the *sn_ta_recruiter.enable_outlook_integration* property and set the value to **true**.
4. **Optional:** Locate the *sn_ta_recruiter.exchange_meeting_user* property and set the value to the user principal name.
   - Any email invites originating from Hiring Experiences is sent from the user principal name account, if defined. If not defined, it defaults to the user account used when setting up the Microsoft Exchange Online spoke.
   - To send emails on behalf of the user principal name account, the user created while setting up the Microsoft Exchange Online spoke should have delegated access.
5. **Optional:** Enable placeholder outlook invites to be sent by locating the *sn_ta_recruiter.block_interviewer_calendar* property and setting the value to **true**.
6. Navigate to **All** > **Microsoft Exchange Online Spoke** > **Webhook Registry**.
7. Locate and open the Job interview scheduling record.
8. Select **Callback URL**.
9. Select **Update**.

Configure Zoom integration

Configure Zoom to seamlessly integrate meeting invites originating from Hiring Experiences with your Zoom account.

For more information, see Set up the Zoom spoke.

Configure Virtual Agent notifications in Microsoft Teams

Configure the Virtual Agent notifications to provide prompt updates for the hiring managers and recruiters in Microsoft Teams.

Before you begin
Role required: admin

You must activate the following plugins for the Virtual Agent notification functionality.

- Employee Center Pro plugin (sn_ex_sp_pro)
- Glide Virtual Agent plugin (com.glide.cs.chatbot)

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Note: The Glide Virtual Agent Lite plugin (com.glide.cs.chatbot.lite), if enabled, only provides read-only notification. It doesn't support actionable notification.

For more information on activating the Glide Virtual Agent plugin (com.glide.cs.chatbot), see Activate Virtual Agent.

About this task

The Virtual Agent notification is available in the Microsoft Teams messaging app. Activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) within Talent Acquisition environment.

After you have set up the Glide Virtual Agent plugin (com.glide.cs.chatbot), it prompts you to set up Microsoft Teams.

Procedure

1. Integrate ServiceNow Virtual Agent with Microsoft Teams.
   For more information, see Integrating Virtual Agent with Microsoft Teams.
2. Set up the conversational integration of the Glide Virtual Agent plugin (com.glide.cs.chatbot) with Microsoft Teams.

   For more information on setting up the Glide Virtual Agent plugin (com.glide.cs.chatbot) with Microsoft Teams, see Conversational Integration with Microsoft Teams.

Hiring Experiences reference

Learn about the requisition state management, application state management, and other details, which are important to navigate within the Hiring Experiences suite.

Roles in Hiring Experiences

An overview of the different roles and user criteria in Hiring Experiences.

Roles and user criteria

Name	Description
Hiring Core admin [sn_ta_hiring_core.admin]	This role is the super admin in the Hiring Experiences environment.
Hiring Core - Recruiter [sn_ta_hiring_core.recruiter]	This role is for the recruiter who creates and manages the job requisitions.
Hiring Core - Interviewer [sn_ta_hiring_core.interviewer]	This role is for Interviewers who evaluate the applicants on the Job requisition.
Hiring Core - Recruitment Coordinator[sn_ta_hiring_core.recruitment_coordinator]	This role is for the recruiter coordinator who creates interviews and manages the application workflow.
Hiring Core - Hiring manager [sn_ta_hiring_core.hiring_manager]	This role is for the hiring manager for a job requisition.
Hiring Core - Applicant [sn_ta_hiring_core.applicant]	This role is to provide common information to both the internal and external applicants. This role is a parent role of both the internal and the external applicant roles.

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Roles and user criteria (continued)

Name	Description
External applicant [sn_ta_hiring_core.external_applicant]	This role is for the external applicants and contains the snc_external role. It applies to any external applicant who isn't an employee of the company.
Internal applicant [sn_ta_hiring_core.internal_applicant]	This role is for internal applicants and contains the snc_internal role. This only applies to existing employees in the company.
approver_user	This role is required for approver users.
Talent Profile admin [sn_ta_tp.talent_profile_admin]	This role is required to set up Talent Profile.
Talent Profile user [sn_ta_tp.talent_profile_user]	This role is required to use the Talent Profile functionalities.
admin	This is the administrator role. This role has access to all the system features, functions, and data, regardless of the security constraints.

Components installed with Hiring Core

Several types of components are installed with activation of the Hiring Core plugin, including tables, user roles, and scheduled jobs.

Roles installed

Role title [name]	Description	Contains roles
Hiring Core admin [sn_ta_hiring_core.admin]	This role is the super admin in the Hiring Experiences environment.	• Hiring Core - Hiring manager [sn_ta_hiring_core.hiring_manager] • Hiring Core - Recruiter [sn_ta_hiring_core.recruiter] • Talent Profile admin sn_ta_tp.talent_profile_user
Hiring Core - Hiring manager [sn_ta_hiring_core.hiring_manager]	This role is for the hiring manager for a job requisition.	• Skills Foundation user [skill_user] • Manager Hub user [sn_mh.manager_hub_user]

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Role title [name]	Description	Contains roles
		• Talent Profile user [sn_ta_tp.talent_profile_user]
Hiring Core - Recruiter [sn_ta_hiring_core.recruiter]	This role is for the recruiter who creates and manages the job requisitions.	• Skills Foundation user [skill_user] • Placeholder [template_read_global] • Placeholder [template_editor_group] • Placeholder • [email_composer] • Recruitment coodinator [sn_ta_hiring_core.recruitment_coodinator] • Talent Profile user [sn_ta_tp.talent_profile_user] • Canvas user [canvas_user]
Hiring Core - Recruitment Coodinator	This role is for the recruiter coordinator who creates interviews and manages the application workflow.	• Placeholder [template_editor_group] • Placeholder [template_read_global] • Canvas user [canvas_user]
Hiring Core - Interviewer [sn_ta_hiring_core.interviewer]	This role is to provide an interviewer required information.	None
Hiring Core - Applicant [sn_ta_hiring_core.applicant]	This role is to provide common information to both the internal and	None

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Role title [name]	Description	Contains roles
	external applicants.	
Hiring Core - Applicant external [sn_ta_hiring_core.external_applicant]	This role is for the external applicants and contains the snc_external role. It applies to any external applicant who isn't an employee of the company.	None
Hiring Core - Applicant internal [sn_ta_hiring_core.internal_applicant]	This role is for the internal applicants and contains the applicant and the snc_internal role.	None

Scheduled jobs installed

Scheduled job	Description
MarkApplicantInactive	Deactivates applicants no longer viable to the system at regular intervals.
Notify Recruiters and Hiring manager on alternate days	Notifies the recruiters and the hiring managers when interview feedback is not received from the applicant.

Tables installed

Table	Description
Applicant certification [sn_ta_hiring_core_applicant_certification]	Certification details shared by the applicants.
Applicant education [sn_ta_hiring_core_applicant_education]	Education details shared by the applicants.

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Table	Description
Applicant work experience [sn_ta_hiring_core_applicant_work_exp]	Work experience details shared by the applicants.
Extracted skills [sn_ta_hiring_core_extracted_skills]	Details of skills shared by the applicants.
Hiring Task [sn_ta_hiring_core_hiring_task]	Details of the extracted skills from entered values by the applicants.
Interview attendee [sn_ta_hiring_core_interview_attendee]	Details of interview attendees for a role.
interview Feedback [sn_ta_hiring_core_interview_feedback]	Details of the interview feedback received.
Interview slot [sn_ta_hiring_core_interview_slot]	Stores data of the interview slots.
Candidate [sn_ta_hiring_core_job_applicant]	List of candidates stored in the system.
Job Application [sn_ta_hiring_core_job_application]	List of job applications received.
Job Board [sn_ta_hiring_core_job_board]	Gathers data of the job board.
Job Hiring Team [sn_ta_hiring_core_job_hiring_team]	Details of the hiring team for a requisition.
Job interview [sn_ta_hiring_core_job_interview]	Details of interviews for a job requisition.
Job Posting [sn_ta_hiring_core_job_posting]	Details of the job postings for each job requisition.
Job Requisition [sn_ta_hiring_core_job_requisition]	List of job requisitions in the system.
Profile link [sn_ta_hiring_core_profile_link]	Details of the profile linking data.
Interview reschedule history	Historic data of the interview schedules.

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Table	Description
[sn_ta_hiring_core_reschedule_history]	

Components installed with Hiring Connector

The following are the components installed with the activation of the Hiring Connector plugin.

Tables installed

Table	Description
Applicant certification Staging [sn_ta_connector_applicant_certification_staging]	Gathers certification details of the applicants.
Applicant education Staging sn_ta_connector_applicant_education_staging	Gathers educational details of the applicants.
Applicant Work Experience Staging [sn_ta_connector_applicant_work_exp_staging]	Gathers previous work experience details of the applicants.
Job Application Staging [sn_ta_connector_job_application_staging]	Gathers the job application details of the applicants.
Job Requisition Staging [sn_ta_connector_job_requisition_staging]	Gathers the details of the job requisitions.
Profile link Staging [sn_ta_connector_profile_link_staging]	Gathers details of the profile link data.

Load data form

Use the import sets to dump data to your local instance from a third-party integration.

Import set table

Field	Description
Import set table	Type of import set table.
Label	Label of the table being populated.
Name	Name of the table being populated.
Source of the import	Type of data source.
File	Option to upload a file.
Sheet number	Number of allowed sheets in the uploaded file.
Header row	Number of header row allowed in the uploaded file.

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Properties installed with Hiring Core

The system properties installed with the Hiring Core plugin are required to configure different functionalities within the Hiring Experiences environment.

These properties are available for Hiring Core.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Hiring Core

Property	Description

glide.ui.sn_ta_hiring_core_job_application_activity.fields	Formatting fields for the job applications.
	• Type: String
	• Default value: assigned_to, cmdb_ci, state, impact, priority, opened_by, work_notes, comments, *Attachments*, *EmailCorrespondence*, *EmailAutogenerated*
	• Other possible values:
	  ○ nRead roles: sn_ta_hiring_core.admin
	  ○ Write roles: sn_ta_hiring_core.admin

glide.ui.sn_ta_hiring_core_job_interview_activity.fields	Formatting fields for the interview activities.
	• Type: String
	• Default value: *Attachments*, *EmailCorrespondence*, *EmailAutogenerated*, number, state, interview_type, interview_start, interview_end, format, comments, work_notes
	• Other possible values:
	  ○ Read roles: sn_ta_hiring_core.admin
	  ○ Write roles: sn_ta_hiring_core.admin

glide.ui.sn_ta_hiring_core_job_requisition_activity.fields	Formatting fields for the job requisitions. • Type: String • Default value: state, job_title, primary_location, additional_location, hiring_manager, cost_center, seniority_level, department, compensation_range, position_count, employment_type, assignment_group, assigned_to, *Attachments*, cmdb_ci, impact, priority, opened_by, work_notes, comments, on_hold, on_hold_notes, on_hold_reason, approval_history, closure_notes, closure_reason, *EmailCorrespondence*, *EmailAutogenerated*

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Properties for Hiring Core (continued)

Property	Description

	• Other possible values:
	  ○ Read roles: sn_ta_hiring_core.admin
	  ○ Write roles: sn_ta_hiring_core.admin

sn_ta_hiring_core.changes_require_reapproval_fields	Fields that trigger a new approval request when updated.
	• Type: String
	• Default value: compensation_range, location_flexibility, seniority_level, position_count
	• Other possible values:
	  ○ Read roles: sn_ta_hiring_core.admin
	  ○ Write roles: admin

sn_ta_hiring_core.due_date_for_interview_feedback	Default due date set for the applicant to provide feedback on their interview experience. • Type: Integer • Default value: 7 • Other possible values: Ignore cache: Selected

sn_ta_hiring_core.enable_va_notification_for_fields	Fields that trigger Virtual Agent notifications when updated.
	• Type: String
	• Default value: state, job_title, primary_location, compensation_range
	• Other possible values:
	  ○ Read roles: sn_ta_hiring_core.recruiter, sn_ta_hiring_core.hiring_manager
	  ○ Write roles: sn_ta_hiring_core.admin

sn_ta_hiring_core.interviewFeedbackScheduleJobLength	Buffer period after which the feedback interview request is created. • Type: Integer • Default value: 3600 • Other possible values:

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Properties for Hiring Core (continued)

Property	Description
	○ Read roles: sn_ta_hiring_core.recruiter, sn_ta_hiring_core.recruitment_coordinator ○ Write roles: admin, sn_ta_hiring_core.admin
sn_ta_hiring_core.markApplicantInactive.noOfDays	Default number of days after which applicants are considered inactive. • Type: Integer • Default value: 30 • Other possible values: ○ Read roles: admin, sn_ta_hiring_core.admin ○ Write roles: sn_ta_hiring_core.admin, admin
sn_ta_hiring_core.min_admin_count	Default number of admins accepted. • Type: String • Default value: 1 • Other possible values: ○ Read roles: sn_ta_hiring_core.admin ○ Write roles: sn_ta_hiring_core.admin
sn_ta_hiring_core.req_stages_allowed_for_editing	Job requisition states when the requisitions are editable. • 10 New • 20 Pending Approval • 30 Rejected • 40 Ready • 50 Open • 60 Closed The following are the field values: • Type: String • Default value: 10,30,40 • Other possible values: ○ Read roles: sn_ta_hiring_core.admin, admin ○ Write roles: admin

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Notifications in Hiring Experiences

Notifications in Hiring Experiences help the hiring manager, the recruiter, and the applicant keep abreast of any significant development in the hiring process.

Use the email and the Virtual Agent notifications within the Hiring Experiences suite. Stay updated on recent changes made to your job requisitions as a hiring manager or a recruiter.

Follow up with your applicants with the Virtual Agent Microsoft Teams chat. For more information, see Configure Virtual Agent notifications in Microsoft Teams.

Virtual Agent notifications

Virtual Agent notifications help the hiring manager and the recruiter remain updated about the recent changes in their requisitions and corresponding applications keeping the communication channel smooth.

Virtual Agent for the hiring manager

For job requisitions you receive notifications

When a recruiter is assigned to a requisition.

When a field in a job requisition form is updated.

When the state of the job requisition changes.

You can:

- Leave a message reply for the recruiter via the Virtual Agent.
- Follow the link to go to the job requisition details page.
- Skip notifications to stop the inflow of notifications.

Virtual Agent for the recruiter

For job requisitions you receive notifications

When a hiring manager leaves a message for the recruiter from the activity stream of the Hiring tab.

When the State of the job requisition changes. The recruiter receives a notification for self-made changes too.

For job applications you receive notifications

when an applicant leaves a message from the Applicant Center.

You can:

- Leave a message reply for the hiring manager via the Virtual Agent notification.
- Follow the job requisition link to go to the job requisition details page.

You can also:

- Follow the job application link to go to the job application details page.
- Leave a message reply for the applicant.
- Skip notifications to stop the inflow of notifications.

The Virtual Agent notifications feature is only available with the Microsoft Teams.

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For more information on setting up Virtual Agent with Microsoft Teams, see Configure Virtual Agent notifications in Microsoft Teams.

Hiring tab

The Hiring tab is a centralized hub for hiring managers, designed to facilitate efficient stakeholder collaboration and drive a streamlined and effective hiring process.

Get started

Explore	Configure	Use
		
Learn about the Hiring tab application	Install and configure the Hiring tab application	Learn how to use the Hiring tab application

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Hiring

Learn more about the Hiring application and review the benefits it can provide to the hiring managers in your organization.

Hiring overview

The Hiring application provides a unified and seamless experience for managing hiring needs, allowing hiring managers to track job requisitions and applications efficiently. It facilitates collaboration with recruiters and offers clear insights into responsibilities, streamlining the hiring process.

Hiring users

Users

User	Description
Hiring manager	Hiring managers request job openings, track jobs, collaborate with recruiters, view and compare applications, provide feedback, and so on.

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Hiring benefits

Hiring benefits

Benefit	Feature	Users
Open a job requisition when there's a vacancy.	Create a job requisition as a hiring manager	Hiring manager
Track the job requisitions and the associated details in the Hiring tab.	Tracking a job requisition in the Hiring tab	Hiring manager
Track the applications on a job requisition and the associated details in the Hiring tab.	Tracking an application record from the Hiring tab	Hiring manager
Collaborate with the recruiter for a job requisition.	Collaborate with the recruiter	Hiring manager
View hiring content like company policies and processes in the Hiring tab.	View hiring content	Hiring manager

What to explore next

To learn more about configuring and using Hiring, see:

- Configuring Hiring
- Using Hiring

Hiring

Increase your productivity with a portal that provides clarity in the hiring process and an effortless collaboration with the recruiters. Save the time required to hire with an intuitive hiring flow.

Bring in seamless process, accountability, and awareness, with greater collaboration, automated systems, and clear communications with the Hiring tab within the Manager Hub.

Save time and increase effectiveness with effortless collaboration with the recruiting team.

Hiring provides the hiring manager with:

- Improved hiring efficiency.
- Reduced time to hire.
- Clear approval flow for a requisition.

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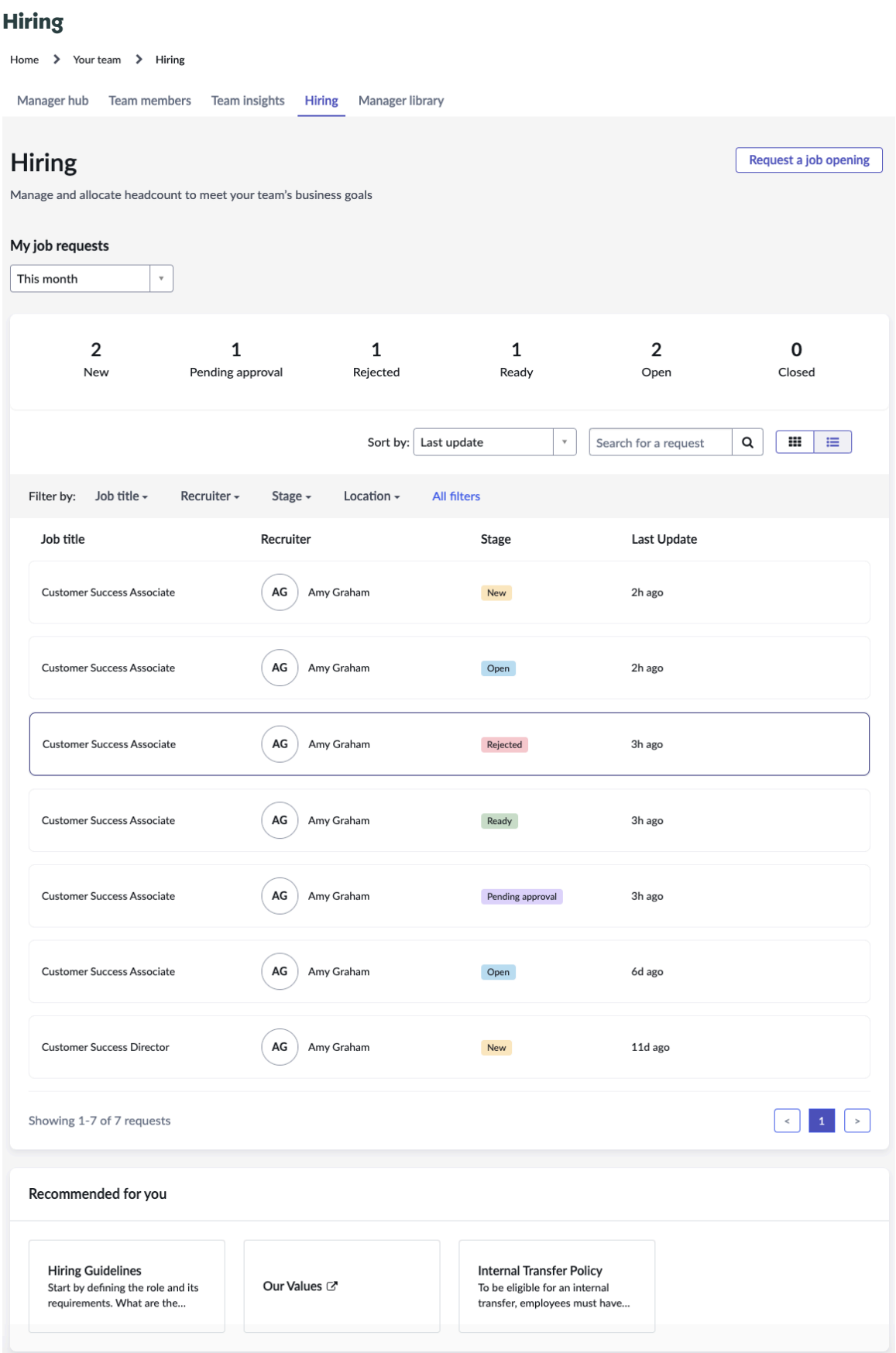

Open a requisition, support a recruiter to create a job description, collaborate with the recruiters, and track the approval workflow, as a hiring manager, on the Hiring tab.

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Configuring Hiring

Install and configure Hiring to use it in the hiring process.

Install Hiring

You can install the Hiring tab application (sn_ta_hiring_mgr) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Hiring application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Hiring tab application (sn_ta_hiring_mgr) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure Hiring

Set up the Hiring tab in the Manager Hub to empower the hiring managers to make quality hires. Create a seamless process and easy communication with the recruiter.

Set up the Recommended for you section to add and view hiring content easily. For more information on setting up Recommended for you, see Recommended for you.

Enable Now Assist Q&A Genius Results to generate answers from articles most relevant to the search query. For more information, see Enabling Now Assist Q&A Genius Results.

Customize the job requisition form fields according to your organizational requirements. For more information, see Create or edit a catalog item.

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Set up field data on the job requisition request form

Add an entry to the reference tables to provide the field values in the job requisition request form.

Add an entry in the respective tables for the following field values to be available on the job requisition request form.

You must have the admin role to configure the fields.

- Add the Job Profile field entry to the Job Profile [sn_skills_int_job_profile] table and the Job Level field entry to the Job Level [sn_skills_int_job_level] table. For more information, see Components installed with Skills Foundation.
- Add the Office Location field entry to the Office Location [sn_fin_office_location] table. For more information, see Add office locations.

The Office Location field must have the Legal Entity field defined. For more information on adding a legal entity entry to the Legal Entity [sn_fin_legal_entity] table, see Legal entity.

Customize the fields on the job requisition request form

Customize the fields you want to include in the job requisition request form, according to your organizational requirement.

For more information on how to customize the fields, see Create or edit a catalog item.

You can use the job requisition request form as it is provided out of the base system too. For a description of the field values, see Job requisition form.

Using Hiring

Use the Hiring tab, as a hiring manager, to leverage greater collaboration with stakeholders and a streamlined hiring process.

Hiring tab

The hiring tab works as the source of truth for the hiring manager.

The hiring tab helps the hiring managers track the requests raised by them from the My job requests section.

Hiring tab

It provides information about the number of open requisitions by state.

It also lists out all the job requisition by Job Title, Recruiter, State, and Last Updated data.

Create a job requisition as a hiring manager

Request for a job requisition for a vacancy you want to fill in your organization.

Before you begin

Role required: sn_ta_hiring_core.hiring_manager

Procedure

1. Navigate to **All** > **Employee Center** > **Your team** > **Hiring**.
2. Select **Request a job opening**.
3. On the new job opening request form, fill in the fields.
   For a description of the field values, see Job requisition form.

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4. Select save or submit.

Selection	Action
Save as draft	The job requisition details are saved as a draft.
Submit	A new job requisition is created.

Access the saved draft in the **Draft** tab under My Requests.

Note:

When a job request is created by a hiring manager, the recruiter can see the open request on the overview page of the Recruitment Workspace. For more information, see Get overview of recruitment workload.

Result
A job requisition is created and in New state.

Use Now Assist to open a job requisition

Use Now Assist in Virtual Agent to create or duplicate a job requisition for a vacancy that you want to fill in your organization.

Before you begin
Make sure that you activate Now Assist in Virtual Agent version 4.0.1 or later as some Now Assist features might vary in earlier versions.

Role required: sn_ta_hiring_core.hiring_manager, sn_ta_hiring_core.recuiter

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Open the Virtual Agent chat window by selecting the chat icon ( ).
3. Request to open a new job requisition in one of the following ways.
   - Select **Show me everything** > **New job opening request**.
   - Enter a request in the chat to open a new job requisition.
4. Select one of the following options and follow the Virtual Agent prompts.

Option	Action
Create a new job requisition	Create a job requisition by answering the prompts, which are used to fill the Job requisition form. For a description of the field values, see Job requisition form.
Duplicate a job requisition	Duplicate an existing job requisition by selecting it from the provided list.

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Option	Action
	Important: This option is available only if the Now Assist for HR Service Delivery (HRSD) plugin is activated and you have existing job requisitions.

Note: Any catalog item defined by you can be accessed using Now Assist in Virtual Agent.

Result
A new job requisition is created.

Note: When a job request is created by a hiring manager, the recruiter can see the open request on the overview page of the Recruitment workspace. For more information, see Get overview of recruitment workload.

Tracking a job requisition in the Hiring tab

Hiring manager can view the detailed status of an open job requisition to track and update. Hiring managers can refer to relevant hiring materials to enhance their knowledge base.

View the details of the job requisition when you open a requisition from the Hiring dashboard.

Get detailed knowledge of an open job requisition.

See the progression of the job requisition and the current state with the requisition stepper widget on the overview section.

The **Details** tab provides all the detailed field values given at the time of job requisition request.

The **Activity** tab helps the hiring manager collaborate with the recruiter and the approvers to fill in the vacancy.

The **Approvals** tab shows the name of the approver and the state of the approval request for easy tracking.

- View the approval details when the recruiter has submitted the requisition for approval.
- See a comment that is added to the approval request by the approver.

The **Job Description** tab shows the job description for the job requisition.

The **Applications** tab lists all the applications on the job requisition and their respective details.

- Identify applications with a Response Requested tag indicating that the recruiter has requested your inputs.
- Share your recommendation for the application with the recruiter by selecting the required option from the **Select response** drop-down list.
- If you have already provided a response, you can add a comment for the recruiter on an active application record by selecting **Add comment**.
- Select up to four applications and then select **Compare applications** to evaluate them based on the applicant's average rating, interview progress, and feedback received.

The **Interview phases** tab lists all the interview phases set up for the job requisition and their respective details.

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Tracking an application record from the Hiring tab

Track an application on a job requisition and view its corresponding details as a hiring manager.

From the **Applications** tab of a job requisition, select an application record to view its details.

You can share your recommendation for the application with the recruiter by selecting **Select response** and then selecting the required option.

If you have already provided a response, you can add additional comments for the recruiter on an active application record by selecting **Add comment**.

The following information is available on the application record page:

- The stages the application has gone through and the upcoming stages.
- Upcoming activities section that displays the upcoming proposed and scheduled interviews in a chronological order. You can request the recruiter for a new time slot for a scheduled interview, by selecting the corresponding **Request new time** button.

The **Overview** tab displays the applicant details that include the basic information, professional experience, education information, and certifications, if any.

The **Interview** tab lists all the interviews scheduled with the applicant with details such as interview name, type, state, start time, and duration. You can select an interview from the list to navigate to the interview record page and view the interview details, attendee list, and feedback received for the applicant.

The **Feedback** tab displays the feedback received for the various interviews scheduled with the applicant. As a hiring manager, if you're one of the interviewers, you can select **Provide feedback** to share your feedback with the recruiter. If needed, you can also edit your feedback.

Collaborate with the recruiter

Collaborate with the recruiter for the job requisition on the activity stream.

Before you begin

Role required: sn_ta_hiring_core.hiring_manager

Procedure

1. Navigate to **All** > **Employee Center** > **Your team** > **Hiring**.
2. Search for the job requisition, select it.
3. In the Activity stream of the job requisition details page, send a message to the recruiter, using the **Comments** tab.
   The hiring manager can also see comments from the recruiter and the approver of the job requisition, in the Activity stream

Result

The recruiter receives an email notification with the details of the comment.

View hiring content

See different hiring materials available in the Hiring tab.

Access relevant hiring content, as a hiring manager, from the Recommended for you section.

Get a better understanding of the region-specific hiring policies and processes.

For more information on setting up Recommended for you in Hiring, see Configure Hiring.

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Use AI agents to create job requisition

Use AI agents to automate the job requisition creation process from the Virtual Agent chat window and use the inputs from the hiring manager to create a refined job requisition.

To be able to use the AI agents from the Virtual Agent chat window, you must configure them first. For information, see .

AI agents and their role in creating job requisition

AI Agent	Role
Job requisition creation leader AI agent	Invokes the other agents in sequence, based on the user input.
Hiring requirement gathering AI agent	Fetches prefilled values configured in the catalog questions and collects job title and location from the hiring manager. It checks for a job requisition, with similar role and title, last opened by the hiring manager. If found, it asks the hiring manager if that can be used and fills in the values accordingly.
Hiring requirements refinement AI agent	Asks the hiring manager if they want to hire a candidate with similar skills to that of an existing candidate. If yes, it fetches the required skills, preferred skills, and maximum education of the existing candidate and prefills it. For any details that's not available, it seeks information from the hiring manager to finalize the requirements.
Job description creation AI agent	Fetches job description, if available, from existing job requisition fetched by the Hiring requirement gathering AI agent. It also fetches the job description templates configured in the Template table. After fetching this information, it presents the available options to the user to choose from. They can choose to either reuse, modify, or create a job description. The job requisition is then created and its link is shared with the hiring manager.

Recruitment Workspace

The Recruitment workspace centralizes job requisition tracking, boosts hiring efficiency, enhances applicant engagement, and enables recruiters to take smarter decisions with talent insights.

Get started

Explore



Learn about Recruitment workspace

Configure



Install and configure the Recruitment workspace application

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Use	Reference
 Learn how to use Recruitment workspace	 Important reference information about Recruitment workspace

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management .
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center .
- Connect with other Customer Service Management users at Now Community .

Exploring Recruitment Workspace

Learn more about Recruitment workspace and review the benefits it can provide to the recruiters in your organization.

Recruitment workspace overview

The Recruitment workspace application provides recruiters with a centralized platform to manage their work efficiently, offering features such as KPI dashboards, job requisition tracking, and stakeholder collaboration. It enables recruiters to streamline their hiring process, track key metrics, and improve hiring efficiency in one unified workspace.

Recruitment workspace users

Users

User	Description
Recruiter	Recruiters manage job requisitions and applications, collaborate with hiring managers and applicants, schedule and manage interviews.
Recruitment coordinator	Recruitment coordinator assists the recruiter during the hiring process.

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Recruitment workspace benefits

Recruitment workspace benefits

Benefit	Feature	Users
Create a job requisition and move it easily through the process.	Create a job requisition as a recruiter	Recruiter
Add detailed job description to job requisitions.	Add a job description to a requisition	Recruiter
View and track the job requisitions to manage your work better. Reach out to the applicants to engage with them.	Track a job requisition in the Recruitment workspace	Recruiter
Add, edit, or remove members from the hiring team.	Manage hiring team	Recruiter
Move the job requisitions easily through the process of hiring.	Manage the job requisitions as a recruiter	Recruiter
View and track the applications on a job requisition and the associated details.	Tracking an application in the Recruitment workspace	Recruiter
Collaborate effectively with the hiring manager. Help the hiring manager with creating an accurate job description.	Collaborate with the hiring manager	Recruiter
Send emails to applicant from a job requisition.	Send an email from a job requisition	Recruiter
View the KPI dashboard to analyze key metrics.	View the Talent Acquisition Dashboard	Recruiter

What to explore next

To learn more about configuring and using Recruitment workspace, see:

- Configuring Recruitment Workspace
- Using Recruitment workspace
- Recruitment Workspace reference

Recruitment workspace

Increase productivity with a flexible workspace that facilitates effective communications among the hiring manager, the hiring team, and the applicants.

Leverage the flexible workspace and its native communication channel among all stakeholders in the hiring process - the hiring manager, the hiring team, and the applicants.

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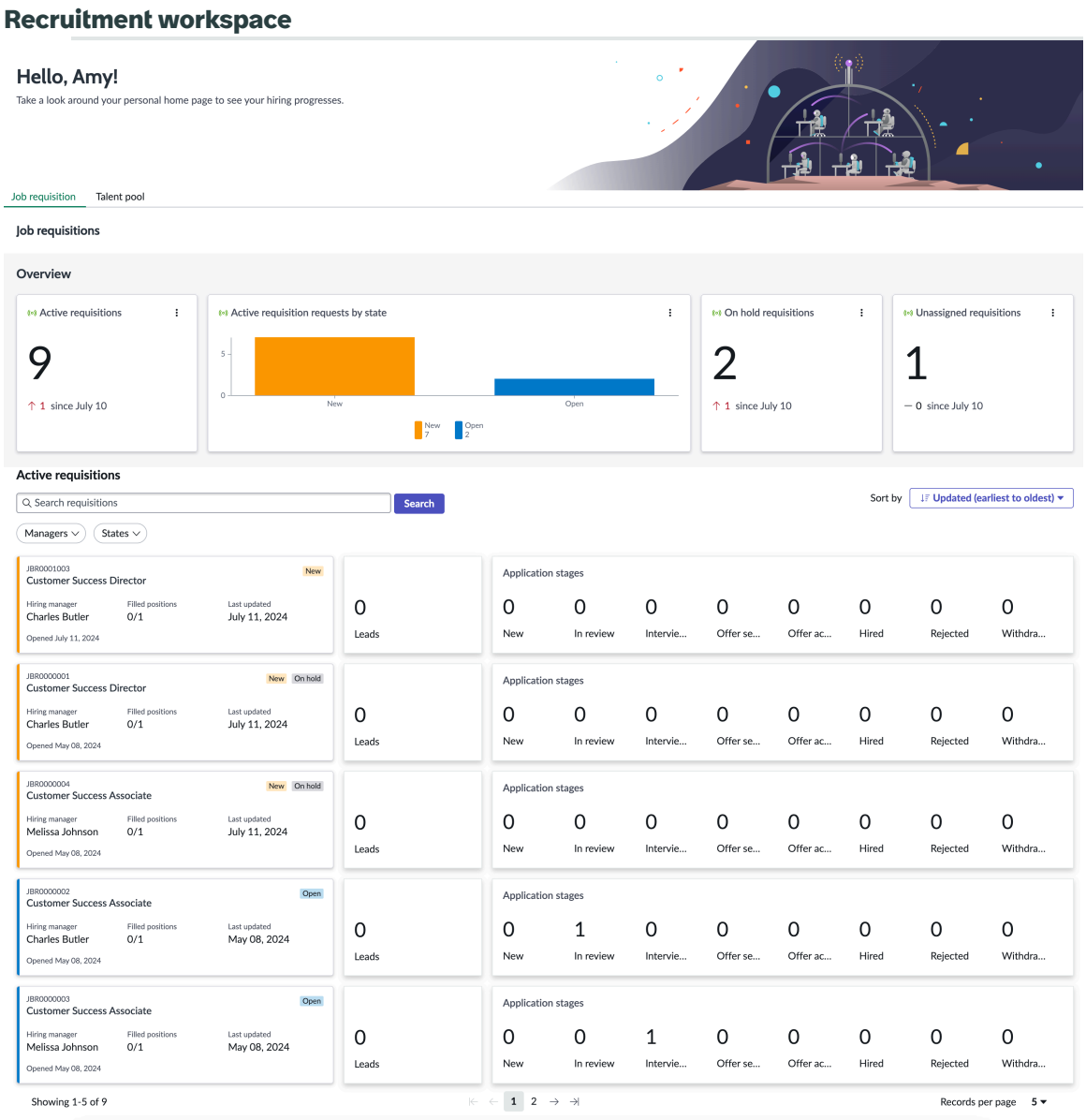

The Recruitment workspace enables you to have:

- Transparent job requisition and associated application tracking.
- Improved hiring efficiency and stakeholder management.
- Improved applicant experience with constant engagement.
- Improved hiring decisions with Talent profiles and pool.

For more information on the Talent Pool tab in the Recruitment workspace, see Talent pool record view.

For more information on using different features on the Recruitment workspace, see Get overview of recruitment workload.

List view in Recruitment workspace

The List view in the Recruitment workspace displays all assigned job requisitions, interviews, tasks, and their key details.

Using the list categories and filters, you can quickly find the required job requisition, interview, or task that you must work on.

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To get to the list view, you must select the list icon (). When you select a record in a list view, the record opens in a new tab.

Lists

The Lists view enables you to manage your Recruitment workspace and all your own entities. You can view the following items in the **Recruitment workspace** > **List** view:

- Job requisitions
- Applications
- Interviews
- Scheduling preferences
- Interview feedback
- Tasks

My Lists

Any list that you create appear in the My Lists section. Lists in this section are only visible to you.

Configuring Recruitment Workspace

Set up the Recruitment workspace to provide recruiters with an integrated workspace and a collaborative communication channel.

Install Recruitment workspace

You can install the Recruitment workspace application (sn_ta_recruiter) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Recruitment workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Scheduled jobs and Store applications are installed with Recruitment workspace.

For more information, see Components installed with Recruitment workspace.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Recruiter Workspace application (sn_ta_recruiter) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Activate the performance analytics jobs in Hiring Experiences

Activate the performance analytics (PA) jobs to create an uninterrupted flow of job requisition updates by their states in the Recruitment workspace.

Before you begin

Role required: sn_ta_hiring_core.admin

Procedure

1. Navigate to **All** > **Platform Analytics Administration** > **Indicators** > **Automated Indicators**.
2. Run the following PA jobs first for historical data collection and then for daily data collection.
   - *[TA Job Requisition] Unassigned* indicator
   - *[TA Job Requisition] On hold and assigned to me* indicator
   - *[TA Job Requisition] Assigned to me* indicator

Result

You have set the performance analytics jobs to create a flow of daily data updates of the job requisitions by their states.

Create assignment groups

Create assignment groups to allocate job requisitions efficiently among the recruiters.

Create assignment groups, as a recruiter, to allocate job requisitions to a designated group of recruiters.

The process of assignment might be automated or manual. It serves the following purpose:

- Allocate a type of job requisition to a group.
- Automate the process of job requisition assignment.
- Decrease the time spent on determining which requisition should be assigned to which recruiter.

Set up the assignment groups to view data on the recruitment dashboard in the Recruitment workspace overview page.

For more information on setting up assignment groups, see Configure assignment group types.

Configure the fields to be duplicated in a job requisition

Configure which fields are duplicated when a recruiter duplicates a job requisitions.

You can configure which fields are duplicated with sn_ta_recruiter.duplicate_allowed_fields (sn_ta_recruiter.duplicate_allowed_fields) system property.

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You must have the system administrator role to do this task.

Enable recruiters to view email details in the activity stream

Add the recruiter role to a system property. The recruiter can view the details of the email in the activity stream of the Recruitment workspace.

Before you begin
Role required: admin

Procedure

1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for `glide.ui.activity.email_roles`.
3. Select the *`glide.ui.activity.email_roles`* property.
4. In the **Value** field, add the `sn_ta_hiring_core.recruiter` role.
5. Select **Update**.

Configure hiring task types

Configure different types of hiring tasks in the Recruitment workspace for efficient task management.

Before you begin
Role required: sn_uni_task.admin

Procedure

1. Navigate to **All** > **Universal Tasks** > **Administration** > **Universal Task Configurations**.
2. In the default Job Application [sn_ta_hiring_core_job_application] table, add more tasks in **Task types**.
   The default **Task types** are **Upload Documents** and **Mark When Complete**. The following are the other options available to be configured.
   - **Submit Catalog Item**
   - **Checklist**
   - **Collect Employee Input**
3. Select **Update** to save your changes to the record table.

Related topics

Map task types in Recruitment workspace

Map task types in Recruitment workspace

Map tasks with its corresponding task types in the Universal Task to select and assign in the Recruitment workspace.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Interceptors**.
2. In the Interceptors list, select **Applicant Task Rule**.
3. In the Answers section, select the required answer you want to map to a task type.

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4. In the **Target URL** field, set the `sysparm_type` and the `sysparm_label` to your required task type and select **Update**.
5. **Optional:** Select **New** and select **Ask the user to make a selection based on SNC choice list** to create a new answer option.
6. **Optional:** In the Answer new record form, fill in the fields, and select **Submit**.
   For a description of the field values, see Task mapping form.

Result
You've mapped a task to a task type.

Create job description templates

Create job description templates to make the new requisition requesting process more streamlined.

Create standard job descriptions, as a recruiter, that can be used for similar roles. The job descriptions make the process of requesting a job opening easier and more streamlined.

The system administrator creates the job description templates, which are available globally to all recruiters.

The recruiters can create the job description templates for themselves and also add it to the assignment groups they are part of, for others to use it.

For more information on creating a job description template, see Create a template using the Template form.

Configure approval workflows

Customize an approval workflow according to your organizational requirements.

Before you begin
Role required: admin

About this task
Hiring Experiences provides an approval flow, where the approval request goes to the manager of the hiring manager, as part of the base system configuration. You can customize the approval flow, to add a different role for the approval, or add more conditions to it, with the following procedure.

Procedure
1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select the **Subflows** tab.
3. Locate and select **Submit for approval subflow**.
4. On the Submit for approval subflow page, select **Ask for Approval**.
5. Modify the conditions in **Rules**.
6. Select **Done** and **Save**.
7. Select **Publish**.

Customize job requisition state management workflow

Add new job requisition states or customize the job requisition state management workflow according to your organizational needs.

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Customize the job requisition state management workflow to add modifications to the predefined workflow. For more information, see Customize job requisition state management workflow [KB1700566].

To add a new job requisition state:

1. Open the job requisition table(sn_ta_hiring_core_job_requisition).
2. Right-click and select **Configure** > **Table**.
3. In the **Columns** tab, search for and select the State column.
4. In the **Choices** tab, select **New**.
5. In the **Label** field, enter the name of the new state.
6. In the **Value** field, enter a numerical value for the new state.

   Note: The value must be a unique number that determines the order of the state and enables proper sequencing. For example, to add a new state between two existing ones, enter a number that falls between their respective values.

7. Select **Submit**.

Configure application state

Add new job application states according to your organizational needs.

Before you begin
Role required: admin

Procedure

1. Open the job application table(sn_ta_hiring_core_job_application).
2. Right-click and select **Configure** > **Table**.
3. In the **Columns** tab, search for and select the State column.
4. In the **Choices** tab, select **New**.
5. In the **Label** field, enter the name of the new application state.
6. In the **Value** field, enter a numerical value for the new application state.

   Note: The value must be a unique number that determines the order of the state and enables proper sequencing. For example, to add a new state between two existing ones, enter a number that falls between their respective values.

7. Select **Submit**.

Modify the re-approval trigger

Modify which fields can trigger an approval request if it is updated.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties**.
2. Select changes_require_reapproval_fields (sn_ta_hiring_core.changes_require_reapproval_fields).

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3. Update the **Value** field with the field names.
   The following fields, if updated after receiving an approval, can re-trigger an approval request, as available out of the base system.
   - Compensation range
   - Location flexibility
   - Preferred level of seniority
   - Number of headcount

Using Recruitment workspace

Use the Recruitment workspace to streamline your hiring tasks as a recruiter.

Get overview of recruitment workload

Recruiters can use the Recruitment workspace overview section to have enhanced visibility into their workload that prospects to effective prioritization of work.

Leverage the transparency in data visibility that helps prioritization of work. Use the overview section to manage your active, on hold, or unassigned requisitions.

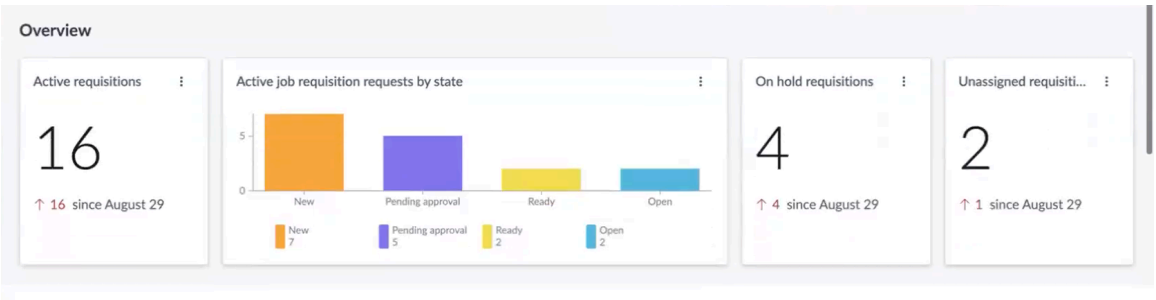
You can view the requisitions by their respective states on the home page and act on it, as required.

As a recruiter:

- View and prioritize your requisitions under **Assigned to me**.
- Assign an unassigned requisition to yourself, another recruiter, or to an assignment group.

The overview section displays a number of **Active requisitions**, **Active job requisition requests by state**, **On hold requisitions**, and **Unassigned requisitions**. It also shows the trend of the requisitions by state, whether the numbers have increased or decreased.

Recruitment overview



Select any section to view all the related requisitions in it.

The requisitions are visible in card view and list view.

When you select a card, it opens the job requisition details page.

Filter and sort options

Use the following filter and sort options to shift through the job requisitions.

- Use **All managers** to filter by the hiring manager.
- Use **All states** to filter by state of the job requisitions or view all.
- Use **Sort by State** to sort the job requisition by date.

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All the job requisitions display the individual state of that requisition both in card and list views.

- To view the most recently updated job requisitions, choose **Updated (newest to oldest)**.
- To view the oldest updated job requisitions, choose **updated (oldest to newest)**.
- To view the latest job requisitions, which have been opened, choose **Opened date (newest to oldest)**.
- To view the oldest job requisitions, which have been opened, choose **Opened date (oldest to newest)**.

Search

Use the search bar to search for a requisition.

You can view the requisition and its associated job applications.

Application stages

View all the applications associated with a job requisition. The application data comes from the designated application tracking system (ATS) in your organization.

Create a job requisition as a recruiter

Request for a job requisition for a vacancy you want to fill in your organization.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the list view of the job requisitions and select **New**.
3. On the create new job requisition form, fill in the fields.
   For a description of the field values, see Job requisition form.
4. Select **Save**

Note:

When a job request is created by a hiring manager, the recruiter can see the open request on the overview page of the Recruitment Workspace. For more information, see Get overview of recruitment workload.

Result
A job requisition is created and in New state.

Add a job description to a requisition

Add a job description to a requisition, using job description templates.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Open the job requisition where you want to add a job description.

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3. Select the **Job description** tab to open the **Job description** field.
4. **Optional:** In the Templates section, select a job description template from the **My Templates** tab.
5. **Optional:** Update the content if required, when it's populated in the job requisition.
6. Select **Save**.
   The Job descriptions are auto-populated from the job profiles too.

What to do next

Send the requisition for approval. For more information, see Submit a job requisition for approval.

Approve a job requisition in the Employee Center

Approve a job requisition from My tasks in the Employee Center.

Before you begin

Role required: approver_user

Procedure

1. Navigate to **All** > **Employee Center** > **My tasks**.
2. Select a job requisition approval request from your **Open** requests tab.
   - To view the details of the job description, select the **Details** tab.
   - To view the job description, select the **Job description** tab.
   - To communicate anything to the recruiter, select the **Activity** tab.
   - To approve a request, check the details and select **Approve**.
   - To reject a request, select **Reject**.

   You must provide a reason in the Reject request pop-up window to reject an approval request.

   The job requisition moves to the **Rejected** state after the approver rejects an approval request.

   For more information on the state management system, see Job requisition state management.

   For more information on the configuration of the approval experience, see Approvals hub.

   Note: An email notification with the approval request also comes to the approver's email address.

   For more information on approval on email, see Approval request view on email.

Approval request view on email

Email notification for an approval request helps the approver be notified without delay.

An email notification is sent to your registered email address when a job requisition approval request is raised for you.

Get the details of the approval request like job title, hiring manager, recruiter, employment type, compensation range from the email notification.

You can approve or reject the request for the job requisition from the email notification.

Select **approval task** to navigate to the portal to complete the approval task.

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Track a job requisition in the Recruitment workspace

Track applications on a job requisition, view job details, manage the hiring team, and add or remove interview phases.

See details of a job description and communicate with the hiring manager and the applicants.

The **Overview** tab is the landing page for a job requisition and has the following sections:

- Cards show the count of applications in various states. Select any of the cards to show the list of applicants in that state.
- The Applications section lists the applications on the job requisition. Select one or more applications and select **Request hiring manager response** to send an email notification to the hiring manager requesting recommendation for the applications.
- The Hiring team section shows all the hiring team members for the job requisition. You can add or edit the hiring team members from here.
- The Job details section shows the summary of the job requisition.

The **Details** tab provides all the detailed field values given at the time of job requisition request. Post messages in the Activity section to collaborate with the hiring manager and the approver for the requisition.

The **Job Description** tab shows the job description and the job requirement summary for the job requisition. You can modify the job description and send it for approval by selecting **Submit for approval**.

The **Hiring team** tab lists all the members who are part of the hiring team and their details. You can add or remove members from the hiring team by selecting **Add** or **Remove** respectively. You can also request for or view the scheduling preferences of the hiring team members by selecting **Request scheduling preferences** and **View scheduling preferences** respectively.

The **Interview phases** tab lists all the interview phases set up for the job requisition. You can add or remove interview phases from this tab by selecting **Add phase** or **Remove** respectively.

The **Approvers** tab shows the name of the approver and the state of the approval request for easy tracking.

- You can view the approval details when the recruiter has submitted the requisition for approval.
- You can see any comment that is added to the approval request by the approver.

The **Prospects** tab shows all the applicants for the job requisition. You can add applicants from here and also create prospects.

Send an email from a job requisition

As a recruiter, send an email to your applicants on a job requisition and provide personalized details.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Open a job requisition.
3. Select the **Applications** tab.
4. Open the application record associated with the applicant that you want to communicate with.

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5. Select the **Details** tab.
6. Send an email to the applicant using the **Email** tab on the Compose section.

Result
The applicant receives the email. The email is also added to the activity stream of the application record.

Manage hiring team

Add, edit, or remove hiring team members from a job requisition.

Add members to Hiring team

Add members to a hiring team for a job requisition to create a panel of interviewers.

Before you begin
Role required: sn_ta_hiring_core.recruiter, sn_ta_hiring_core.recruitment_coordinator

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Open the desired job requisition.
3. On the **Hiring team** tab, select **Add**.
   The Add new hiring team members pop-up appears.
4. In the **Team Member** field, search for and select the desired names.
5. Select **Add**.

Edit hiring team members

Modify details of the hiring team members such as hiring roles, scheduling preference status, future slot availability, and so on.

About this task
A job requisition has default hiring team members: the recruiter and the hiring manager. They're the required interviewers and they aren't visible to the applicant by default.

When adding more people to the hiring team, you can assign hiring roles to them and update other details.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspaces**.
2. Open the desired job requisition.
3. Select the **Hiring team** tab.
4. Edit the relevant fields in the Hiring team list.

Field	Description
Hiring role	Hiring role for the hiring team member. For details on roles, see .

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Field	Description
Visibility to applicant	Option to make the hiring team member visible to the applicant.
Scheduling preference status	Status of the member's scheduling preference, whether requested, submitted, or not requested.
Future slots available	Indicates if future slot availability has been shared.
Availability till	Date till which availability has been shared.

5. Select **OK**.

Remove members from Hiring team

Remove members from a hiring team.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to > **Workspaces** > **Recruitment workspace**.
2. Open the desired job requisition.
3. Select the **Hiring team** tab.
4. Select the check boxes for the members that you want to remove.
5. Select **Remove**.

Manage the job requisitions as a recruiter

Update, put it on hold, send a requisition for approval, or close it.

Put a job requisition on hold

Put a job requisition on hold if the requirement changes.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to **Active requisitions** from the recruitment dashboard.
   a. Choose an active requisition from the list.
3. Select **On hold**.

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a. In the Pause the job requisition pop-up window, select a reason for the action.

b. Optional: Add comments, if any.

Note:

- If you choose the other reason option from the list of reasons, providing comments in the notes is required.
- If a requisition is closed while it was on hold, the on hold state won't be retained.

You can put a Job requisition on hold regardless of its state. For more information on the requisition state maangement, see Job requisition state management.

Result
The requisition is put on hold and displays the last state along with the on hold badge when searched.

Withdraw hold on a job requisition

Withdraw the hold put on a job requisition when it is needed.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select a job requisition that you want to resume working on.
3. Select **Resume**.

Result
The job requisition is off hold and ready to be taken forward.

Duplicate a job requisition

Duplicate an existing job requisition to save time.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Open the job requisition that you want to duplicate.
3. Select **Duplicate** from the ellipses present on the top-right corner of the job requisition details page.
4. Change the fields as needed and select **Save**.
   Configure which fields are duplicated. For more information, see Configure the fields to be duplicated in a job requisition.

Close a job requisition

Close a job requisition if it’s no longer required.

Before you begin
Role required: sn_ta_hiring_core.recruiter

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Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select a requisition that you want to close.
3. From the ellipses at the top-right corner, select **Close requisition**.
4. In the pop-up window, select **Cancel requisition** and select **Close**.
   If a requisition is closed while it was on hold, the on hold state won't be retained. For more information, see Job requisition state management.

Reopen a job requisition

Reopen a job requisition that is already in closed state.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Open a requisition that is in closed state and must be reopened.
3. Select **Reopen**.
   - The requisition moves to the **New** state after it's reopened.
   - For more information on the state management system, see Job requisition state management.

Submit a job requisition for approval

Submit a job requisition for approval to higher management.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment Workspace**.
2. Select **New** from the **Active job requisition requests by state** card.
3. Select a job requisition displayed on the Job Requisitions table filtered for state **New**.
   The job requisition opens in a new tab.
4. On the Job requisition approval request form, fill in the fields.
   For a description of the field values, see submit for approval form.
5. Select **Submit for approval**.

Result
The approval request shows up on the approvers **My tasks** open requests.

Cancel a submitted approval request

Cancel a submitted approval request if it's no longer needed.

Before you begin
Role required: sn_ta_hiring_core.recruiter

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Procedure

1. Navigate to **Workspaces** > **Recruitment workspace.**.
2. Go to the recruitment dashboard and open the job requisition.
3. Select **Cancel Approval**.
   - When you cancel an approval request, the state changes to canceled on the **Approvers** tab.
   - The cancelled notification also shows up on the Activity stream.

Resend a job requisition for approval

Resend a job requisition for approval if last-minute changes or technical faults.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruiter workspace**.
2. Open a job requisition that you want to resubmit for approval.
3. Select **Resend for approval**.
   - The requisition which was in **Ready** state before goes back to **Pending approval** state.
   - For more information on the state management system, see Job requisition state management.

Result
The approval request is resend to the assigned approver.

On the **Approvers** tab, the state of the approval request changes to Requested.

Open a job requisition in your ATS

Open a job requisition in your ATS after it's approved and ready.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. From the list of job requisitions on the dashboard, open a requisition that is in **Ready** state.
3. From the ellipses on the top-right corner, select **Open requisition**.

Result
The requisition is in **Open** state. It's open to the ATS and can be taken forward for further hiring process.

For more information on the integration with your ATS, see Integrate with your ATS.

Tracking an application in the Recruitment workspace

Track an application for a job requisition and its corresponding applicant and interview details as a recruiter or recruitment coordinator.

From the Applications section of a job requisition, select an application to view its details.

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You can select **Request hiring manager response** to send an email notification to the hiring manager requesting a recommendation for the application.

You can schedule an interview with an applicant from the application page. For more information, see Schedule an interview.

The **Overview** tab displays the following:

- Upcoming activities section that displays the upcoming proposed and scheduled interviews in a chronological order. You can select a card to navigate to the corresponding interview record.
- Job requisition details card. You can select the card to navigate to the job requisition.
- Application state journey with the current state highlighted.
- Applicant details that include the basic information, professional experience, and education information.

The **Details** tab displays the applicant details, enables you to communicate with the hiring team and the applicant using the Compose section, and view updates to the application record in the Activity section.

The **Tasks** tab displays a detailed list of the tasks assigned to the applicant or hiring team. You can select **Add new** to assign a new task to the applicant or hiring team. For more information, see Create tasks.

The **Other applications** tab displays a detailed list of other applications that the applicant has previously engaged with to inform fitment.

The **Job interviews** tab displays a list of job interviews scheduled with the applicant.

The **Interview feedback** tab enables you to do the following:

- Track interview feedback status and act upon it, as and when required.
- View a list of interview feedback records created for the applicant and its details.
- View feedback records assigned to other interviewers by selecting the respective record and nudge interviewers if there's a delay in submitting feedback.
- As an interviewer, select the record assigned to you to provide feedback. For more information, see Provide interview feedback.

Note: You must activate the Interview Management plugin to have access to the **Job interviews** and **Interview feedback** tabs.

Hiring tasks

Assign tasks to your job applicants or internal stakeholders and manage those within the Recruitment workspace.

Create a conducive and collaborative environment with all your stakeholders.

Create and assign a task to your applicants or to your internal stakeholders, like the hiring managers from the **Tasks** tab available in the application record view.

View **All tasks** and **Tasks Assigned to me** in the **Lists** view under **Tasks** in a job requisition record page. It enables you to get a consolidated view of all the tasks for the job requisition at a glance, for efficient task management.

Receive notifications at regular intervals if your applicants haven't finished the assigned tasks in time. For more information, see Task email notifications for recruiters.

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Create tasks

Create tasks for your applicants or internal stakeholders within the Recruitment workspace and assign it to the respective personas.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. In a job requisition record page, select the required application.
3. Go to the **Tasks** tab of the job application and select **Add new**.
4. In the Select task pop-up window, pick a task from the available list, and select **Submit**.
   The **Task type** field is automatically selected when you select the **Task**. For more information on task types, see Configure hiring task types.

   For more information on mapping task types with different tasks, see Map task types in Recruitment workspace.
5. On the Applicant task form, fill in the fields.
   For a description of the field values, see Applicant task form.
6. Select **Save**.

Result
View the new task from the **Lists** view of an application page in a job requisition. The list-view provides a consolidated and efficient task management option.

Collaborate with the hiring manager

Collaborate with the hiring manager for the job requisition on the activity stream.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Open a requisition.
3. Send a message to the hiring manager using the **Comments** tab of the Compose section.

Result
The hiring manager receives an email notification with the details of the comment.

Task email notifications for recruiters

The email notifications provide alerts to the recruiters when a task is completed by an applicant.

Receive a notification when one of your applicants completes an assigned task from the Applicant Center portal.

The same is visible on the application record page in Recruitment workspace. If the applicant attached a document while completing a task, the attachment is visible in the Attachments section in the **Tasks** tab.

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Receive a reminder email when an assigned task is overdue. The *Notify Recruiters when Due Date is yesterday(Overdue by one day)* scheduled job is active by default.

View the Talent Acquisition Dashboard

Understand the hiring trend in your organization with the Talent Acquisition Dashboard.

Before you begin

Role required: sn_ta_hiring_core.recruiter and itil

Procedure

1. Navigate to **All** > **Platform Analytics** > **Dashboards** > **Talent Acquisition Dashboard**.
2. View the metrics available on the dashboard to understand your hiring trend.
   For more information, see Talent Acquisition Dashboard.

Recruitment Workspace reference

Reference topics provide additional information about the state management, forms, properties, components, and dashboard in Recruitment workspace.

Job requisition state management

An overview of the job requisition state management system for a recruiter.

Job requisition states and actions

State	On hold	Access for recruiter	Allowed actions	Result of the action	New state post the action	Access for recruiter in new state
Open	Yes	Read only	Resume	Withdraw the hold from the job requisition.	Open	Read only
			Close	Close the job requisition and don't cancel any approvals.	Closed	
			Duplicate	Create a new job requisition by duplicating an existing one.	Open	
	No	Read only	On Hold	Put the job requisition on hold.	Open	Read only
			Close	Close the job requisition and don't cancel the approvals.	Closed	
			Duplicate	Create a new job requisition by duplicating an existing one.	Open	
Ready	Yes	Editable	Resume	Withdraw the hold from the job requisition.	Ready	Editable
			Close	Close the job requisition and don't cancel the approvals.	Closed	Ready only
			Duplicate	Create a new job requisition by duplicating an existing one.	Ready	Read only
	No	Editable	On Hold	Put the job requisition on hold.	Ready	Editable

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Job requisition states and actions (continued)

State	On hold	Access for recruiter	Allowed actions	Result of the action	New state post the action	Access for recruiter in new state
			Open	Send the job requisition to the designated application tracking system (ATS).	Open	Read only
			Resend for Approval	Cancel all existing approvals and submit the requisition for fresh approvals.	Pending Approval	Read only
			Close	Close the job requisition and don't cancel the approvals.	Closed	Read only
			Duplicate	Create a new job requisition by duplicating an existing one.	Ready	Read only
Rejected	Yes	Editable	Resume	Withdraw the hold from the job requisition.	New	Editable
			Close	Close the job requisition.	Closed	Read only
			Duplicate	Create a new job requisition by duplicating an existing one.	New	Editable
	No	Editable	Submit for Approval	Submit the job requisition for approval.	Pending Approval	Read only
			On Hold	Put the job requisition on hold.	New	Editable
			Close	Close the job requisition.	Closed	Read only
			Duplicate	Create a new job requisition by duplicating an existing one.	New	Editable
Pending Approval (Requested)	Yes	Read only	Resume	Withdraw the hold from the job requisition.	New	Editable
			Close	Close the job requisition.	Closed	Read only
			Duplicate	Create a new job requisition by duplicating an existing one.	Pending Approval	Read only
	No	Read only	Cancel Approval	Cancel all existing approvals and put the job requisition in **New** state.	New	Editable
			On Hold	Put the job requisition on hold and cancel all existing approval requests.	New	Editable
			Close	Close the job requisition and don't cancel the approvals.	Closed	Read only
			Duplicate	Create a new job requisition by duplicating an existing one.	Pending Appoval	Read only
Ready	In **Ready** state and follows the behaviour of the same.					
Rejected	In **New** state and follows the behaviour of the **Rejected** state.					

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Job requisition states and actions (continued)

State	On hold	Access for recruiter	Allowed actions	Result of the action	New state post the action	Access for recruiter in new state
Closed	Yes	Read only	**Note:** Withdraw the hold whenever a job requisition is closed.			
	No	Read only	Reopen	Changes to **New** state and follows the behaviour of the same.	New	Editable
			Duplicate	Create a new job requisition by duplicating an existing one.	Closed	Read only

Application states for the recruiter

An overview of the application states the way the recruiters see it.

Application states for recruiters

State	Description
New	The applicant has submitted the application and is in **New** state in the recruiter's queue.
In review	The application is in review.
Interviewing	The applicant is in the interview process.
Offer sent	The applicant has received an offer.
Offer accepted	The applicant has accepted the offer.
Hired	The applicant is hired.
Rejected	The application is rejected.
Withdrawn	The applicant has withdrawn the application.

Applicant task form

The applicant task form provides the field description required to set a task for an applicant.

Applicant task creation

Field	Description
Number	Task number generated for the new applicant task.
Type	Description of the type of task assigned.
Short description	Place to provide a short description of the assigned task.
Description	Place to provide a detailed description of the assigned task.
State	State of the task.

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Applicant task creation (continued)

Field	Description
Due date	Due date for the task created.
Assigned to	Applicant the task is assigned to.
Attachments	Place where attachments are added by the recruiter or visible when its attached by the applicant.

Components installed with Recruitment workspace

The following are the components installed with activation of the Recruitment workspace plugin.

Scheduled jobs installed

Scheduled job	Description
Notify Recruiters when Due Date is yesterday(Overdue by one day)	Provides reminder email to the recruiters when the applicant, completes an assigned task or it is overdue.
[TA Job Requisition] Daily Data Collection	Collects daily data on job requisitions updates.
[TA Job Requisition] Historical Data Collection	Collects historical data about the job requisitions.
Interview feedback creation	Creates a feedback record to receive feedback from the interviewee.

Job requisition form

Use the form to request a job opening in your organization, as a hiring manager or recruiter.

Job requisition form

Note: The fields that appear may vary depending on whether you're requesting a job opening as a hiring manager or recruiter.

Field	Description
Number	Job requisition number.
State	State of the job requisition.
Functional job title	Job title that focuses on the specific tasks and responsibilities associated with the role for which the request is raised. If the functional job title has associated seniority level and skills configured, the **Preferred level of seniority**, **Required skills**, and **Preferred skills** are auto-populated.
Job code	Code associated with the **Functional job title**.
Job title	Job title associated with the **Functional job title**.
Hiring manager	Hiring manager responsible for the job requisition.

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Job requisition form

Note: The fields that appear may vary depending on whether you're requesting a job opening as a hiring manager or recruiter.

(continued)

Field	Description
Preferred job title	Organization-preferred job title for the role, if any.
Cost center	Cost center charged for the job requisition.
Primary location	Primary location for which the request is raised.
Department	Department associated with the job requisition.
Employment type	Type of employment.
Additional locations	Any additional locations for which the new job requisition is applicable.
Assignment group	Assignment group associated with the job requisition.
Recruiter	Recruiter responsible for the job requisition.
Preferred level of seniority	Level of seniority required for the job.
Number of headcount	Number of openings available.
Applicant type	Preferred type of the applicant, whether internal, external, or no preference.
Compensation range	Compensation range applicable for the job.
Working hours	Shift hours for the job opening.
Reasons for hire	Reason for the vacancy, whether a new hiring or backfill.
Travel requirements	Percentage of travel requirements for the job.
Priority	Priority level for the job opening.
Relocation support	If relocation support is needed or not.
Immigration sponsorship	If immigration sponsorship is needed or not.
Location flexibility	Location preference for the role, whether hybrid, in-office, or remote.
Minimum years of experience	Minimum years of experience required for the job.

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Job requisition form

Note: The fields that appear may vary depending on whether you're requesting a job opening as a hiring manager or recruiter.

(continued)

Field	Description
Minimum qualification	Minimum qualification required to be hired.
Certifications	Certification details of the applicant.
Required skills	Required skills for the job opening.
Preferred skills	Preferred skills for the job opening.
Preferred companies	Companies you may prefer to get your hiring applicants from.
Additional notes	Additional notes, if any, from the hiring manager.
Additional comments	Additional comments from the recruiter, if any.
Work notes (Private)	Private work notes from the recruiter.

Properties installed with Recruitment workspace

The system properties installed with the Recruitment workspace plugin is required to configure different functionality in the Recruitment Workspace environment.

These properties are available for Recruitment workspace.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Recruitment workspace

Property	Description
exchange_meeting_user sn_ta_recruiter.exchange_meeting_user	User principal name of the Azure service account user that is used for sending calendar invites. • Type: String • Other possible values: Ignore cache: Selected
maximum_slots_for_interview_scheduling sn_ta_recruiter.maximum_slots_for_interview_sch	Restriction for the maximum number of slots that can be selected by a recruiter while scheduling interview. The maximum number available is 10.

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Properties for Recruitment workspace (continued)

Property	Description
	• Type: Integer • Value: 3 • Other possible values: Ignore cache: Selected
state_for_onboarding_mail sn_ta_recruiter.state_for_onboarding_mail	State that set off the email notification trigger for onboarding. • Type: String • Value: 60 • Other possible values: Ignore cache: Selected
block_interviewer_calendar sn_ta_recruiter.bok_interviewer_calendar	Calendar blocker for the interviewer while scheduling interviews. • Type: true | false • Value: true • Other possible values: Ignore cache: Selected
duplicate_allowed_fields sn_ta_recruiter.duplicate_allowed_fields	Replicable fields while duplicating a job requisition. • Type: String • Value: job_title, preferred_job_title, seniority_level, compensation_range, position_count, primary_location, hiring_manager, cost_center,department, employment_type, working_hours, travel_requirement, relocation_support, immigration_sponsorship, min_yrs_experience, minimum_qualification, certification, required_skills, preferred_skills, preferred_companies, job_description • Other possible values: ○ Read roles: sn_ta_hiring_core.admin ○ Write roles: admin
enable_outlook_integration sn_ta_recruiter.enable_outlook_integration	Property to enable the outlook integration for Interview scheduling.

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Properties for Recruitment workspace (continued)

Property	Description
	• Type: true | false • Value: true • Other possible values: • Ignore cache: Selected

Task mapping form

The descriptions provided are required to fill the form to map a task with a task type.

Answer record

Field	Description
Question	Parent question that has the reference in the interceptor record.
Name	Name of the task.
Order	Order of preference for the task.
Active	Option to enable the feature.
User Prompt	Name of the task that is visible in Recruitment workspace. The name visible in Recruitment workspace and the one provided in the **User Prompt** should be the same.
Next question	Another question that has the reference in the interceptor record. **Note:** The task mapping in the Recruitment workspace doesn't support the functionality.
Application	Scope of the application the record is in.
Type	Type of available questions. • Leading Question • Multiple Choice • Yes / No • Freeform Text • Button • External Choice
Target URL	Target URL set for the task type mapping.
Button label	Label visible on the survey button.
Roles	Roles who have access to the answer record.

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Talent Acquisition Dashboard

The Talent Acquisition Dashboard helps get an overview of the workload and performance details of the hiring efforts in your organization.

The users of the Talent Acquisition Dashboard require the following role.

User persona and required role

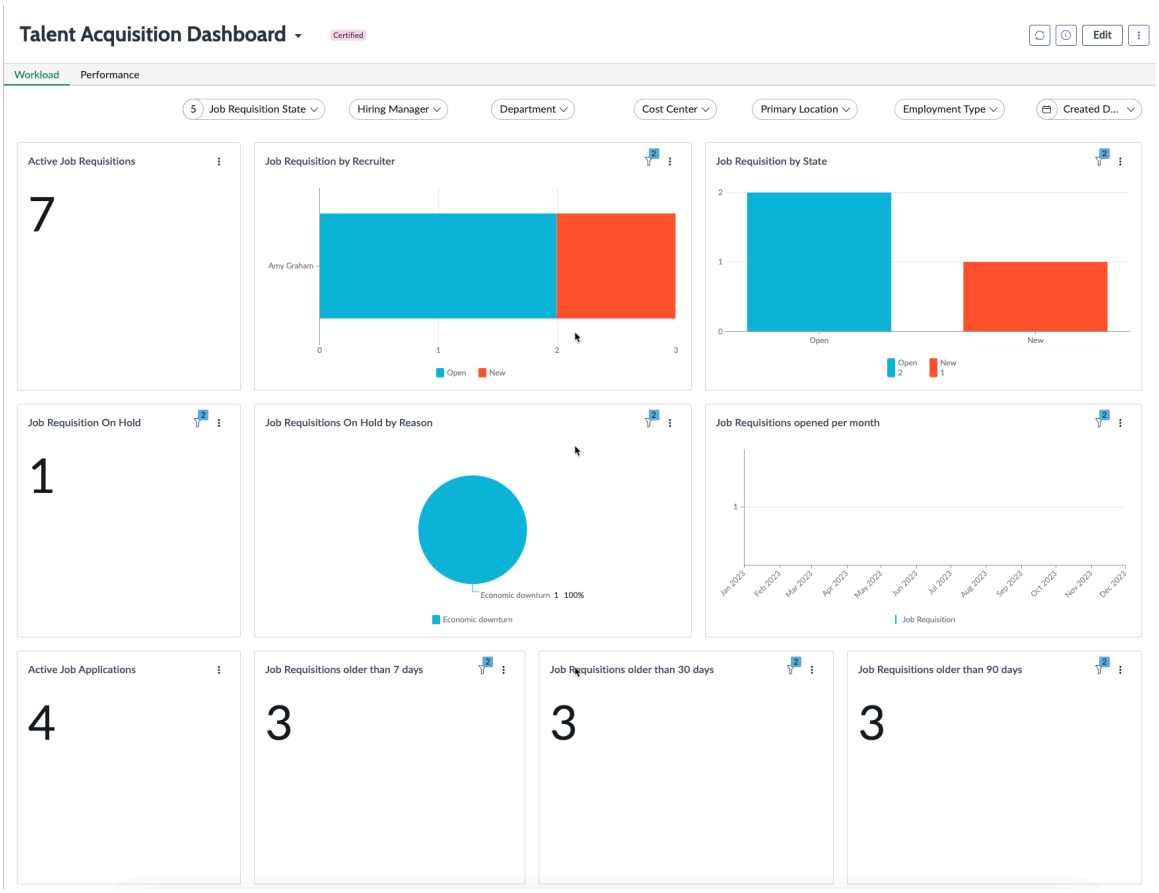
User	Description	Required role
admin (sn_ta_hiring_core.admin)	This user can edit the data display in the dashboard.	itil
Recruiter (sn_ta_hiring_core.recruiter)	This user can view the data on the dashboard.	itil

The Talent Acquisition Dashboard has the **Workload** tab and the **Performance** tab. Each tab has several card views to display data.

The data visualization on the **Workload** tab is as follows:

Dashboard data view

Workload tab view



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Workload tab

Card	Data type	Description
Active Job Requisitions	Number	Number of active job requisitions.
Job Requisition by Recruiter	Stacked bar	Data on the requisitions by their owning recruiters and their States.
Job Requisition by State	Bar chart	Data visualization of the job requisitions by their States.
Job Requisition On Hold	Number	Number of job requisitions on hold.
Job Requisition On Hold by Reason	Pie chart	Percentages of requisitions put on hold are segregated by reasons.
Job Requisitions opened per month	Line graph	Monthly trend of opening job requisitions.
Active Job Applications	Number	Number of active job applications.
Job Requisitions older than 7 days	Number	Number of job requisitions that are created more than 7 days back.
Job Requisitions older than 30 days	Number	Number of job requisitions that are created more than a month back.
Job Requisition older than 90 days	Number	Number of job requisitions that are created more than 3 months back.

Apart from the data cards, you can use the following filters to skim through the data on the tab.

- Job Requisition State
- Hiring Manager
- Department
- Cost Center
- Primary Location
- Employment Type
- Created Date

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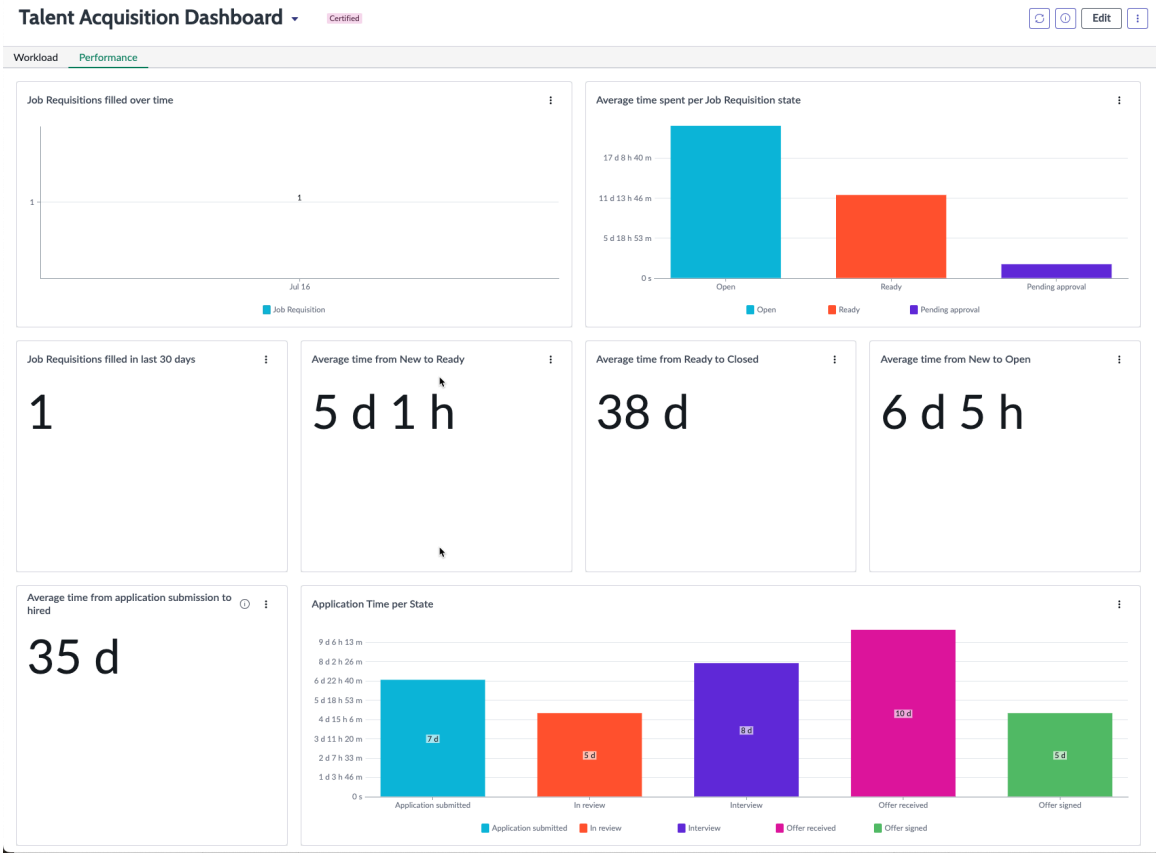
Performance tab view



Performance tab

Card	Data type	Description
Job Requisitions filled over time	Line graph	Trend of positions filled over the time.
Average time spent per Job Requisition state	Bar chart	Time that is spent on a job requisition segregated by their states.
Job Requisitions filled in the last 30 days	Number	Number of job requisitions created more than a month back.
Average time from New to Ready	Number	Aggregated time that is spent to move a requisition from **New** to **Ready** State.
Average time from Ready to Closed	Number	Aggregated time that is spent to move a requisition from **Ready** through the **Closed** State.
Average time from New to Open	Number	Aggregated time that is spent to move a requisition from **New** to **Open** State.
Average time from application submission to hired	Number	Aggregated time that is spent from the submission of an application to hire.
Application Time per State	Graph	Aggregated time an application remains in one state.

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Interview Management

The Interview management application simplifies and optimizes the interview process through structured workflows, flexible scheduling options, automated reminders, and streamlined feedback collection, enabling faster and more collaborative hiring.

Get started

Explore  Learn about Interview management	Configure  Install and configure the Interview management application
Use  Learn how to use Interview management	Reference  Important reference information about Interview management

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Interview Management

Learn more about Interview management and review the benefits it can provide for different users in your organization.

Interview management overview

Interview management streamlines the entire interview process through structured workflows designed for efficient, accurate, and on-time scheduling—while minimizing rescheduling through in-product collaboration and integration of multi-source data.

The in-system setup offers full transparency and supports faster execution. Scheduling becomes more efficient with flexible options that support both candidate-led and recruiter-led slot

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bookings, while considering calendar availability and individual scheduling preferences to reduce conflicts. It provides full visibility into interview progress, supported by automated reminders and notifications to keep all stakeholders aligned.

Additionally, it facilitates seamless feedback sharing and tracking, empowering hiring managers to efficiently compare applicants and make well-informed decisions.

Interview management users

Users

User	Description
Recruiter	Recruiters configure interview phases for job requisitions, schedule and manage interviews, provide feedback, and so on.
Recruitment coordinator	Recruitment coordinators assist recruiters in the interview process.
Interviewer	Interviewers share scheduling preferences, take interviews, and provide interview feedback.

Interview management benefits

Interview management benefits

Benefit	Feature	Users
Request applicants on a job requisition to share their scheduling preferences.	Request applicant to share scheduling preferences	Recruiter
Request interviewers on a job requisition to share their scheduling preferences.	Request interviewer to share scheduling preferences	Recruiter
View the scheduling preferences shared by applicants to schedule interviews accordingly.	View applicant's scheduling preferences	Recruiter
View the scheduling preferences shared by interviewers and schedule interviews accordingly.	View interviewer's scheduling preferences	Recruiter
Configure interview phases and use them to efficiently schedule interviews, enhancing transparency and saving time.	Add interview phase	Recruiter
Remove interview phases once they're not needed anymore.	Remove interview phase	Recruiter
Schedule interview with applicants on a job requisition to get started with the interview journey.	Schedule an interview	Recruiter
Manage interviews for a job requisition as a recruiter.	Manage interviews	Recruiter

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Interview management benefits (continued)

Benefit	Feature	Users
Provide feedback for interviews that you're a part of.	Provide interview feedback	Recruiter
Share scheduling preferences as an interviewer.	Share scheduling preferences	Interviewer
Manage interviews as an interviewer.	Managing interviews as an interviewer	Interviewer
As an interviewer, provide feedback for interviews that you're a part of.	Provide interview feedback	Interviewer, Hiring manager

What to explore next

To learn more about configuring and using Interview management, see:

- Configuring Interview Management
- Using Interview Management
- Interview Management reference

Configuring Interview Management

Install and configure Interview management to get started with your interview scheduling and management journey.

Install Interview management

You can install the Interview management application (sn_ta_int_mgmt) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Interview management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Interview management:

- Store applications
- Scheduled jobs
- Tables

For more information, see Components installed with Interview Management.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Interview management application (sn_ta_int_mgmt) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Create interview invite email template

Create interview invite email templates to enable recruiters to select them when scheduling interviews.

Before you begin

Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator or sn_ta_hiring_core.admin

Procedure

1. Navigate to **All** > **sys_template.LIST** to create the template.
   For more information on creating a template, see Create a template using the Template form.
2. On the template form, select the table as Job interview and the Template fields as **Meeting invite** and **Meeting subject**.

Using Interview Management

Interview management enables recruiters to define their interview setup, coordinate scheduling with hiring managers, interviewers, and applicants, and manage interviews effectively. It also allows recruiters, interviewers, and hiring managers to provide feedback on interviews, streamlining the overall hiring process.

Request applicant to share scheduling preferences

Request applicants on a job requisition to share their scheduling preferences to plan a seamless interview process.

Before you begin

Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

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Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the required job requisition.
3. On the **Overview** tab, in the Applications section, select the application to request the applicant's scheduling preferences.
4. On the application page, select **Request scheduling preferences**.
5. On the Request scheduling preferences form, fill in the fields.
   For a description of the field values, see Request scheduling preferences form.
6. Select **Send**.

What to do next

- Once you have sent a request, you can select **Send reminder** from the application page to remind the applicant via an email notification to share their scheduling preferences.
- By default, a scheduled job sends a reminder email to the applicant on alternate days for 14 days from the day it was requested, if they haven't shared their preferences. This default value can be configured by an admin by updating the *sn_ta_int_mgmt.remind_availability_in_days* value.

Request interviewer to share scheduling preferences

Request interviewers on a job requisition to share their scheduling preferences to plan a seamless interview process.

Before you begin

Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the job requisition that you want to request the interviewer's scheduling preferences for.
3. In the **Hiring team** tab, select one or more interviewers to request their scheduling preferences.
4. Select **Request scheduling preferences**.
5. On the Request scheduling preferences form, fill in the fields.
   For a description of the field values, see Request scheduling preferences form.
6. Select **Send**.

What to do next

- Once you have sent a request, you can navigate to **List view** > **Lists** > **Scheduling preferences-All** > **Interviewer name** and select **Send reminder** to remind the interviewer via an email notification to share their scheduling preferences. For more information, see List view in Recruitment workspace.
- By default, a scheduled job sends a reminder email to the interviewer on alternate days for 14 days from the day it was requested, if they haven't shared their preferences. This default value can be configured by an admin by updating the *sn_ta_int_mgmt.remind_availability_in_days* value.
- If the interviewer is part of the same Microsoft organization as yours and have installed Proactive prompts application and configured Virtual Agent in Microsoft Teams, they will be notified about the reminder in Microsoft Teams.

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View applicant's scheduling preferences

As a recruiter, view the scheduling preferences shared by applicants to schedule interviews accordingly.

Before you begin
Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the required job requisition.
3. On the **Overview** tab, in the Applications section, select the application to view the applicant's scheduling preferences.
4. On the application page, select **View scheduling preferences**.
   The scheduling preferences shared by the applicant are displayed.

> **Note:** You can only view the scheduling preferences if the applicants have shared the details after you have requested for it. For more information, see Request applicant to share scheduling preferences.

View interviewer's scheduling preferences

As a recruiter, view the scheduling preferences shared by interviewers to schedule interviews accordingly.

Before you begin
Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the job requisition that you want to view the interviewer's scheduling preferences for.
3. In the **Hiring team** tab, select one or more interviewers to view their scheduling preferences.
4. Select **View scheduling preferences**.
   The scheduling preferences shared by the interviewers are displayed.

> **Note:** You can only view the scheduling preferences if the interviewers have shared the details after you have requested for it. For more information, see Request interviewer to share scheduling preferences.

Add interview phase

As a recruiter, define the interview setup for your job requisition and use it for efficient interview scheduling.

Before you begin
Role required: sn_ta_hiring_core.recruiter

About this task
Set up interview phases based on the different rounds you plan to include in the evaluation process for a job requisition. Use these interview phases to schedule interviews with various applicants on the job requisition in a more consistent, transparent, and efficient manner.

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Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the job requisition that you want to add interview phases for.
3. On the **Interview phases** tab, select **Add phase**.
4. On the Create New Interview phase form, fill in the fields.
   For a description of the field values, see Create new interview phase form.
5. Select **Save**.
   The interview phase is added to the **Interview phases** tab.

Remove interview phase

As a recruiter, remove interview phases that you had set up once they aren't needed anymore.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the job requisition that you want to remove interview phases from.
3. On the **Interview phases** tab, select the interview phase you want to remove.
4. Select **Remove**.
5. On the confirmation window, select **Remove**.

Schedule an interview

Schedule interview with applicants on a job requisition to get started with the interview journey.

Before you begin

Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

You must activate the Interview Management plugin to have access to this functionality.

About this task

As a recruiter, you can schedule interviews with applicants throughout their application journey states. These meetings can be screening rounds, interviews, or discussions to evaluate the applicant profile for the job.

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the job requisition that you want to schedule an interview for.
3. In the **Overview** tab, under the Applications section, select the applicant that you want to schedule an interview with.
4. On the application record page, select **Schedule interview**.

   Note: If upgrading from an earlier version, make sure to edit and populate the **Hiring role**, **Visibility to applicant**, and **Type** fields of the hiring team members in the job requisition. For details, see Edit hiring team members.

5. On the Schedule interview form, fill in the fields.
   For a description of the field values, see Schedule interview form.

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6. Preview the draft invite and select **Send**.
   - If you have selected multiple slots, an email invite is sent to the applicant to select a time slot to schedule the interview.
   - If you have selected a single time slot, the interview is scheduled directly and the applicant receives an interview invite to reduce response time.
   - If Microsoft Outlook integration is enabled, after an applicant picks a slot, an interview email invite is automatically sent to the hiring team and applicant. If not enabled, you must manually send an invite to the hiring team and applicant and move the state to Scheduled.
   - If Zoom integration is enabled, and is selected as the interview channel, a Zoom meeting link will be included in the interview invite.
   - If the interview is scheduled to happen within an hour, an interview feedback record per interviewer is created immediately. If scheduled later, feedback records are created an hour before the interview start time by default.

     Note: You can update the *sn_ta_hiring_core.interviewFeedbackScheduleJobLength* property to change the default scheduled time to create feedback records.

7. On the application record page, review the scheduled interview in the **Job interviews** tab.

What to do next

You can also track your interviews from the List view. For more information, see List view in Recruitment workspace.

Manage interviews

Manage interviews as a recruiter or recruitment coordinator. Update interviews as needed.

Before you begin

Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

You must activate the Interview Management plugin to have access to this functionality.

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the job requisition that you want to manage an interview for.
3. In the **Overview** tab, under the Applications section, select the required applicant with whom the interview is scheduled.
4. On the application record page, select the **Job interviews** tab.
5. Select the required interview record.
6. From the interview record page, perform any of the following actions.

Option	Action
Update the state	On the **Details** tab, update the **State** field.
View the attendee details	On the **Attendees** tab, view the attendee de tails such as name, role, acceptance status, job title, and type.

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Option	Action
View the interview feedback details	On the **Feedback** tab, view the feedback de tails such as number, state, rating, review comments, interviewer, and interview type.
Add a feedback record manually, when an interview has happened off the system	On the **Feedback** tab, select **Add feedback** and then select the **Interviewer**. **Note:** ○ If a feedback record in incom plete/complete state is already as signed to an interviewer, a new record can't be created for the same inter viewer. ○ The due date on the feedback record created is set as seven days from the interview start date by default. An admin can update the *sn_ta_hiring_core.due_date_for_intervi* property to change the default value.
Send reminder to interviewer to submit feedback	From the **Feedback** tab, open the feedback record and select **Send reminder**. **Note:** Feedback reminders are also configured to be sent automatically for one week (on alternate days) from the feedback creation date, by default. This default value can be updated using the *sn_ta_hiring_core.due_date_for_intervie* property.
Provide interview feedback	From the **Feedback** tab: ○ To provide interview feedback, open the feedback record assigned to you and en ter the details, and then select **Submit feed back**. For more information, see Provide in terview feedback. ○ To edit a feedback submitted by you, open the feedback record and then select **Edit feedback**. ○ To indicate that an interview assigned to you didn't happen, open the feedback record and select **Interview incomplete** to enter the corresponding reason and com ments.
Reschedule an interview	**a.** Select **Reschedule**. **b.** Select a **Reschedule reason** and enter cor responding **Notes**.

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Option	Action
	Note: The options available in the **Reschedule reason** field can be customized by an admin. **c.** Select **Proceed**. **d.** On the Reschedule interview form, fill in the fields. For a description of the field values, see Schedule interview form. **Note:** The reschedule count of an interview, and the reason and notes entered during rescheduling are saved in the activity stream of the interview record.
Complete an interview	Select **Mark as complete**.
Mark an interview as no show	From the Mark as complete list, select **No show**.
Cancel an interview	From the Mark as complete list, select **Cancel interview**.

Provide interview feedback

As a recruiter or recruitment coordinator, provide feedback for interviews that you're part of.

Before you begin

Role required: sn_ta_hiring_core.recruiter or sn_ta_hiring_core.recruitment_coordinator

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Select the required job requisition.
3. Find the applicant and interview.
   a. In the **Overview** tab, under the Applications section, select the applicant with whom the interview is scheduled.
   b. On the application record page, select the **Job interviews** tab.
   c. Select the required interview record.
   d. On the interview record page, select the **Feedback** tab.
   e. Select the feedback record assigned to you.
   You can also select the feedback record from the **Interview feedback** tab on the application record page.
4. If the interview was completed, do the following.
   a. From the **Rating** drop-down list, select a rating for the applicant.
   b. In the **Comments** field, add the interview feedback details.

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c. **Optional:** In the **Private notes** field, enter any notes that you'd like to take for yourself about the interview.
These notes are only visible to you. They are also available after submitting the feedback.

d. Save or submit the feedback.

- To save the feedback as a draft and submit it later, select **Save**
- To submit and share the feedback with the recruiter and hiring manager, select **Submit feedback**.

5. If the interview didn't happen either because you or the applicant couldn't attend it, or for any other reason, then do the following.

a. Select **Interview incomplete**.

b. From the **Reason** drop-down list, select why the interview didn't happen.

c. In the **Comment** field, enter the details to support the reason, if any.

d. Select **Submit**.

Share scheduling preferences

As an interviewer, when requested by recruiters, share your scheduling preferences to help them schedule interviews accordingly.

Before you begin

Role required: sn_ta_hiring_core.interviewer or sn_ta_hiring_core.hiring_manager

Procedure

1. Open the email notification that you received stating that the recruiter has requested to share your scheduling preferences.
2. Select **Share scheduling preferences**.
3. On the Share scheduling preferences for upcoming interview form, fill in the fields.
For a description of the field values, see Share scheduling preferences form.
4. Select **Share scheduling preferences**.
Once you've shared your scheduling preferences, you can select **Share scheduling preferences** from the email notification again to view or edit the preferences.

Managing interviews as an interviewer

As an interviewer, view and manage interviews that you’re part of.

Interviewers are notified by email about any interviews that they’re part of, after the interview is proposed or scheduled.

After an interview is scheduled, an email invite with a link to the application is received. You can select the Applicant profile link on the email to view the application details.

The application page displays the stages that the application has gone through and the upcoming stages.

The **Overview** tab displays the following information:

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- Upcoming activities section that displays the upcoming proposed and scheduled interviews in a chronological order. You can request the recruiter for a new time slot for a scheduled interview by selecting the corresponding **Request new time** button. For a description of the field values, see Request reschedule form.
- Applicant details that include the basic information, professional experience, education information, and certifications, if any.

The **Interview** tab lists all the interviews that you're part of, with details such as interview name, type, state, start time, and duration. You can select an interview from the list to navigate to the interview record page and view the interview details, attendee list, and feedback provided by you.

The **Feedback** tab enables the interviewer to perform the following:

- Provide interview feedback. For more information, see Provide interview feedback.
- Edit the submitted feedback.

Provide interview feedback

As an interviewer or hiring manager, provide feedback for interviews that you're part of.

Before you begin

Role required: sn_ta_hiring_core.interviewer or sn_ta_hiring_core.hiring_manager

Procedure

1. Navigate to **All** > **Employee Center** > **My Tasks**.
2. From the **Open** tab, select the interview for which you're providing feedback.
   You can also provide feedback from the **Feedback** tab on the application page. To do so, select **Provide feedback** and then the required interview from the **Interview** drop-down list.
3. **Optional:** In the **Private interview notes** field, enter any notes that you'd like to take for yourself about the interview.
   These notes are only visible to you and is available after submitting the feedback as well.
4. If the interview was completed, do the following.
   a. In the **How would you rate this applicant overall?** field, select a rating for the applicant.
   b. In the **Applicant review** field, add the interview feedback details.
   c. Select **Submit feedback** to share the feedback with the recruiter and hiring manager.
   If you're providing feedback from **My Tasks**, you can also select **Save** to save the feedback as a draft and submit it later.
5. If the interview didn't happen either because you or the applicant couldn't attend it, or for any other reason, then do the following.
   a. Select **Interview incomplete**.
   b. From the **Reason** drop-down list, select why the interview didn't happen.
   c. In the **Comment** field, enter the details to support the reason, if any.
   d. Select **Submit**.

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Interview Management reference

Reference topics provide additional information about the forms, properties, and components in Interview management.

Create new interview phase form

The Create New Interview phase form provides the field descriptions required to define interview phases for a job requisition.

Create New Interview phase form

Field	Description
Job requisition	This is automatically set to the job requisition ID for which you're adding the interview phase.
Type	Type of the interview phase. The available options are: • **Screening** • **Technical** • **Managerial** • **Executive** • **Cultural fit**
Title	Title of the interview phase you're setting up.
Order	Order in which this interview round should happen within the overall interview process.
Duration	Duration of the interview round.
Format	Format of the interview, whether it's a one-to-one or a panel round.
Channel	Mode of conducting the interview. The available options are **Zoom**, **Phone call**, and **In person**.
Interviewer roster	A primary list of interviewers to choose from, that can take the interview round.
Additional interviewer roster	A supplementary list of interviewers who can be added to the interview if the primary interviewers are unavailable or if additional perspective is needed.
Description	A short description of the interview phase.

Components installed with Interview Management

With activation of the Interview Management plugin, the associated tables and scheduled jobs are installed.

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Scheduled jobs installed

Scheduled job	Description
Notify Recruiter and Hiring manager on alternate days	Send notifications to Recruiter and Hiring manager.
Remind share availability	Reminder to share scheduling preferences
Sync interview availability preference status	Update future slots available flag of preferences
Purge Interview Preference and Availability Request table data	Purge the data in the Interview Preference and Availability Request tables.

Tables installed

Table	Description
Availability request [sn_ta_int_mgmt_availability_request]	Availability request created to share the scheduling preferences.
Interview preference [sn_ta_int_mgmt_interview_preference]	Interview preferences shared by the interviewers and applicant.
Preferred slot [sn_ta_int_mgmt_preferred_slot]	Preferred slots of the user.
Slot repeat config [sn_ta_int_mgmt_slot_repeat_config]	Slot repeat configuration for recurring slots.

Properties installed with Interview Management

The system property installed with the Interview Management plugin is required to configure functionalities in the Interview Management environment.

Note: To open the System Properties [sys_properties] table, enter sys_properties.list in the navigation filter.

Properties for Interview Management

Property	Description
sn_ta_int_mgmt.remind_availability_in_days	Specifies the number of days from the day the request to share scheduling preferences was sent, until which a reminder email is sent on alternate days to the user (if they're yet to share preferences).

Schedule interview form

The schedule interview form provides the field descriptions required to schedule an interview with an applicant.

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Schedule interview form

Field	Description
Interview phase	Phase you're scheduling the interview for. **Note:** • You must have interview phase set up for the job requisition to be able to select this. For more information, see Add interview phase. • If you select an interview phase, the associated **Interview type**, **Duration**, **Format**, **Interviewers**, **Channel**, and **Interview title** are auto-populated. • You can leave this field blank to schedule ad-hoc interview rounds.
Interview type	Type of the interview. The available options are: • **Screening** • **Technical** • **Managerial** • **Executive** • **Cultural fit** **Note:** This field can be configured by updating the list in the Job Interview table (sn_ta_hiring_core_job_interview).
Duration	Duration of the interview. **Note:** This field can be configured by updating the list in the Job Interview table (sn_ta_hiring_core_job_interview).
Format	Format of the interview, whether it's a one-to-one or a panel round.
Applicant	This is automatically set to the name of the applicant on the application.
Interviewers	Name of the interviewers. **Note:** • You can only add interviewers that are part of the hiring team for the job requisition. To add additional interviewers to the interview, you must first add them to the hiring team. • If you have selected an interview phase, the interviewers specified in the **Interviewer roster** field are automatically added. If needed, you can also add interviewers from the list of **Additional interviewer roster** specified in the interview phase.
Channel	Mode of conducting the interview.

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Schedule interview form (continued)

Field	Description

	Note:
	• This field can be configured by updating the list in the Job Interview table (sn_ta_hiring_core_job_interview).
	• When an interview is scheduled with Zoom selected as the format:
	  ○ The recruiter is added as the host of the meeting.
	  ○ All the interviewers are added as alternate hosts of the meeting.

Time zone	Time zone in which the interview is scheduled.
Time slot selection type	Type of time slot selection. The available options are: • **Select from preferences**: Displays the preferred time slots shared with recruiter. • **All time**: Displays all the time slots for selection. • **Available time**: Displays available time slots in your calendar. This option is available only if Microsoft Outlook integration is activated. • **Custom time slot**: Enables you to select a custom time slot.
Choose time slots	The time slots available for selection based on the selected **Time slot selection type**. **Important:** • If **Available time** is selected, all attendees must belong to the same Microsoft Outlook organization account to view their calendar availability. The calendar availability of external applicant is not tracked. • If **Available time** or **Select from preferences** is selected, a colored banner indicating the availability of attendees appears next to each slot. You can hover over the banner to see which attendees, if any, are unavailable at that time. • If **Custom time slot** is selected, then you can manually select the start time.
Selected time slots	Selected time slots. You can select up to three slots by default. **Note:** • If a time slot conflicts with any attendee's availability, a warning icon (⚠) appears next to the slot, and an alert message is displayed. • You can update the *maximum_slots_for_interview_scheduling* property to enable up to 10 slot selection.
Interview title	Title of the interview to be scheduled.

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Schedule interview form (continued)

Field	Description
Select template	Predefined interview invite email template. For more information, see Create interview invite email template.
Subject	Subject of the interview invite email.
Meeting invite	Body text of the interview invite email. It's auto-generated if you have selected an email template and can be edited.

Request scheduling preferences form

The request scheduling preferences form provides the field descriptions required to request an applicant or interviewer to share their scheduling preferences for upcoming interviews.

Request scheduling preferences form

Field	Description
Applicant	Applicant selected when requesting scheduling preferences. **Note:** This field is available only when you're requesting an applicant's scheduling preferences.
Interviewers	Interviewers selected when requesting scheduling preferences. You can select the field to add other members from the hiring team to request their scheduling preferences. **Note:** This field is available only when you're requesting an interviewer's scheduling preferences.
Duration	Duration for which the scheduling preferences is requested.
Select template	Predefined template to fill the **Subject** and **Message**.
Subject	Subject of the email notification to be sent to the applicant/interviewer requesting their availability.
Message	Body text of the email notification.

Share scheduling preferences form

The share scheduling preferences form provides the field descriptions required to share an applicant's or interviewer's scheduling preferences for upcoming interviews.

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Share scheduling preferences for upcoming interview

Field	Description
Manually share slots	Option to manually add slots and share with recruiter.
Use my calendar	Option to enable recruiters to schedule interviews based on your calendar availability. **Note:** This option is available only for interviewers.
Select time zone	Time zone for which the scheduling preferences is shared. This field appears only when **Manually share slots** is selected.
Start date and time	Earliest date and time that you're available for interviews. This field appears only when **Manually share slots** is selected.
End date and time	Last date and time of the period until which you're available. This field appears only when **Manually share slots** is selected.
All day	Option to share your availability for an entire day. The end date is automatically set to the start date that you select. This field appears only when **Manually share slots** is selected.
Recurring	Option to share your availability for recurring time period. This field appears only when **Manually share slots** is selected.
Repeat	The frequency of recurring availability you're sharing. The available options are **Daily**, **Weekly**, and **Monthly**. This field appears only when **Manually share slots** and **Recurring** are selected.
Days	Days of the week when you're available. This field appears only when **Manually share slots** is selected, and then **Weekly** is selected from **Repeat**.
Lasts	Select either **for** or **until** to specify until when your scheduling preferences are valid. This field appears only when **Manually share slots** is selected.
Number of days/weeks/months	Number of days/weeks/months you're sharing preferences for. This field appears only when **Manually share slots** is selected, and then **for** is selected from **Lasts**.
Ends on this date	End date of the recurring scheduling preferences you're sharing. This field appears only when **Manually share slots** is selected, and then **until** is selected from **Lasts**.

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Share scheduling preferences for upcoming interview (continued)

Field	Description
Add time slot	Add the selected time slots. This field appears only when **Manually share slots** is selected.
Available time slots	Specified time slots to be shared with the recruiter. You can edit or delete the available time slots. This field appears only when **Manually share slots** is selected.
Max number of interviews per day	Maximum number of interviews you're willing to attend in a day.
Preferred buffer time between interviews (in mins)	Your preferred interval between interviews.
Additional notes	Additional notes for the recruiter, if any.

Applicant Center

Applicant Center offers a streamlined and tailored experience for applicants through a dedicated portal, enhancing their overall recruitment experience.

Get started

Explore



Learn about Applicant Center

Configure



Install and configure the Applicant Center application

Use



Learn how to use Applicant Center

Reference



Important reference information about Applicant Center

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.

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- Access real-time courses, self-paced training, and career resources at ServiceNow University.
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Applicant Center

Learn more about Applicant Center and review the benefits it can provide to applicants in your organization.

Applicant Center overview

The Applicant Center application provides a streamlined experience for applicants, allowing them to manage their applications, interviews, and communication with recruiters in one place. It enhances the applicant's pre-hire experience by providing easy access to organization details, job information, and hiring team details, ultimately leading to a more informed hiring process.

Applicant Center users

Users

User	Description
Applicant	Applicants can manage their job applications, access job details, communicate with recruiters, and much more.

Applicant Center benefits

Applicant Center

Benefit	Feature	Users
Access the Applicant Center, as an applicant, after you have submitted an application for an open job application.	Access the Applicant Center	Applicant
See the status of your applications, explore company content, and reach out to the hiring team, if the feature is enabled for you.	Applicant Center home page	Applicant
View the hiring team, job description, location, and so on.	View a job application	Applicant
	Share scheduling preferences	Applicant
Select a convenient time slot once an interview is proposed.	Select an interview slot	Applicant
Request to reschedule an interview.	Request to reschedule interview	Applicant
Request the recruiter to share additional interview time slots if you're unavailable or the proposed slots have been booked.	Request time slots	Applicant
View and manage tasks assigned to you in Applicant Center.	Tasks in Applicant Center	Applicant

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Applicant Center (continued)

Benefit	Feature	Users
Provide feedback about your hiring experience.	Applicant survey	Applicant
Enable keyboard accessibility for your profile to navigate through the Applicant Center portal using keyboard tabs.	Set accessibility preference	Applicant
Applicants receive email notifications when tasks are assigned to them by the recruiters.	Task email notifications for applicants	Applicant

What to explore next

To learn more about configuring and using Applicant Center, see:

- Configuring Applicant Center
- Using Applicant Center
- Applicant Center reference

Applicant Center

Improve your speed and quality of hire by continually engaging with the applicants on a personalized applicant portal.

Provide your applicants with a dedicated portal that has a seamless process and supports effective engagement with the stakeholders in the hiring process.

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Applicant Center



Tell us your experience with us

How would you rate your overall experience with us? Rate it from 1 (lowest) to 5 (highest).

1 2 3 4 5

Keep track of what's going on

Item - 2 of 3 - Engineering Manager(JBR0001016)

round 2

Please select date and time for your upcoming interview schedule.

Select time slot

Active applications 11 | Inactive applications 2

Offer signed

Customer Success Representive

Application submitted 2023-11-02 | In review | Interview | Offer received | Offer signed | Hired

Job ID JBR0001017 | Recruiter Amy Graham

Offer signed

Customer Success Representive

Application submitted 2023-11-02 | In review | Interview | Offer received | Offer signed | Hired

Job ID JBR0001017 | Recruiter Amy Graham

Offer signed

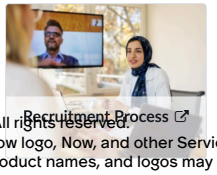
Engineering Manager

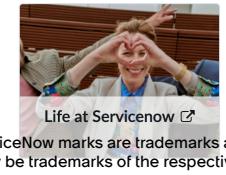
Application submitted 2023-11-01 | In review | Interview | Offer received | Offer signed | Hired

Job ID JBR0001016 | Recruiter Amy Graham

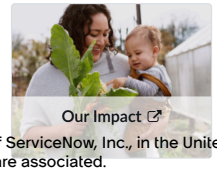
Show 2 More

Quick links


Recruitment Process


Life at Servicenow


Diversity, Equity and Inclusive


Our Impact

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The Applicant Center has the following key features:

- Log in with a magic link without the hassle of a password.
- Learn more about the role that they've applied for, even before being selected for the job.
- Track multiple applications in one place.
- View the hiring team and the job description.
- Select interview time slot or request to reschedule.
- Learn about the company and its culture.
- Collaborate with your recruiter.
- View important notifications that require your attention.

Configuring Applicant Center

Set up a personalized portal for your applicants where they can track and manage job applications and interact with different hiring personas at different points of their hiring journey.

Install Applicant Center

You can install the Applicant Center application (sn_ta_applicant) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Applicant Center application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Scheduled jobs and Store applications are installed with Applicant Center.

For more information, see Components installed with Applicant Center.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Applicant Center application (sn_ta_applicant) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Configure the email notification state

Determine at which state the applicant receives an email to access the Applicant Center.

Choose when the applicant can access the Applicant Center.

Note: You must have the administrator role to perform this task.

Configure time limited authentication

Configure the time limited authentication for your external applicants to log in to the Applicant Center.

Time limited authentication (TLA) gives the applicant a more accessible and easy option to log in to the Applicant Center portal, as opposed to remembering different passwords.

Create post-authentication policies for your external applicant role, so that they can log in to the Applicant Center, using a magic link.

Depending on the post-authentication policy you've enabled, add a condition for the external applicant role and the Applicant Center identity provider. For more information on the roles in Hiring Experiences, see Roles in Hiring Experiences. The identity provider is unique for each portal.

For more information on setting up the post-authentication policy, see Configure an authentication policy.

Configure Content Experiences and Quick links

Configure the campaigns and other company resources that you want to provide your applicants in the Applicant Center.

Create dedicated banners and campaigns with the Content Experiences in the Applicant Center. For more information on setting up the Content Experiences, see Activate Content Experiences.

Note: You can provide the recruiters with the appropriate roles, so that they can target relevant content for the applicants in the Applicant Center.

Provide your applicants relevant company content like the recruitment process and the company culture through Quick links. For more information creating Quick links, see Quick links.

Configure applicant survey

Configure the survey that you want your applicants to take to provide feedback on their hiring experience. Determine at which state the feedback survey goes to the applicant.

Before you begin

Role required: survey_admin, survey_reader

About this task

The **Applicant interview feedback** is available by default that triggers the survey feedback when the applicant reaches the **Interview** state. The following procedure provides details to configure the survey to be triggered at a different state in the hiring process, according to your organizational requirements.

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Procedure

Create the applicant survey for the applicants.
For more information, see Survey designer.

For more information on applicant survey in the Applicant Center, see Applicant survey.

Configure messaging for the applicant

Configure the conditions when an applicant can reach out to the recruiters within the Applicant Center. Create a clear communication channel with the hiring team and a better hiring experience for the applicants.

Before you begin
Role required: sn_ta_hiring_core.admin

About this task
Set up trigger conditions to enable the messaging functionality for an applicant. The functionality can be triggered depending on the job title, the application state, or any other criterion.

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Open the sn_ta_hiring_core_job_application [sn_ta_hiring_core_job_application] table.
3. In the Tab Configurations section, select the **Message** list.
4. Add conditions to enable the messaging functionality for the applicants.
   For a description of the field values, see Configure the standard ticket page.

Set up a scheduled job for applicant deactivation

Set up a scheduled job, at regular intervals, to deactivate applicants no longer viable to the system.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select **MarkApplicantInactive**.
3. View and download the `HiringDeleteRoles.xml` file from the Applicant Center application page on ServiceNow Store.
4. Import the XML file in the Script Include [sys_script_include] table.
5. **Optional:** Modify the frequency of the scheduled job in **Time** and **Run**.
6. **Optional:** Change the **Value** of the system property (sn_ta_hiring_core.markApplicantInactive.noOfDays).
   The base system value to mark an applicant as inactive is 30 days.
7. Mark the **Active** check box as enabled and select **Update**.

Note: The base system condition of the scheduled job is active. You can deactivate it.

Result
The applicant records are deactivated.

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Note: If a deactivated applicant applies again using the same email id that was earlier used to create the sys-user record, all the existing roles are deleted and an external applicant role is assigned during reactivation. For this to happen, you must download the `HiringDeleteRoles.xml` file from the Applicant Center application page on ServiceNow Store.

Configure pre-hire experience on applicant center

Provide continuity in the hiring journey by providing a pre-hire experience on the applicant center.

About this task

Provide applicants with a seamless experience for pre-hire tasks from the applicant center portal. Hired applicants can start their onboarding journey from the applicant center even before their joining day.

Before you begin

Role required: admin

Procedure

1. Create a script in global scope to delete roles.

   For details, see Script includes

   Note: You may use `hiringdeleteroles.xml`, an existing script to delete roles.

2. Write the following business rules for an applicant user when the application state becomes hired.
   For details, see Create a business rule for your service
   a. Delete an external applicant role: *sn_ta_hiring_core.external_applicant*.
   b. Create an internal applicant role: *sn_ta_hiring_core.internal_applicant*.
3. Copy the journey menu from the employee center portal to the applicant center portal.
4. Link the applicant center user to the HR profile and create an onboarding journey using the same applicant user.

   For details, see Create a journey

Result

The applicants are assigned internal roles and they can start their pre-boarding journey from the applicant center giving them a seamless experience with the organization.

Note: Giving internal roles to applicants enables access to other portals intended only for employees (default users).

Using Applicant Center

Use the Applicant Center to provide your applicants with a connected experience with a personalized and dedicated portal.

Access the Applicant Center

Log in to the Applicant Center without a password and explore the portal easily.

Before you begin

Role required: sn_ta_hiring_core.external_applicant or sn_ta_hiring_core.internal_applicant

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About this task

An applicant can log in to the Applicant Center without the need for a password to make the process simpler and more accessible. Applicants receiving an invitation to log in to the Applicant Center is a base system behaviour. You can determine at which state, the email is sent to the applicant's registered email address with the magic link.

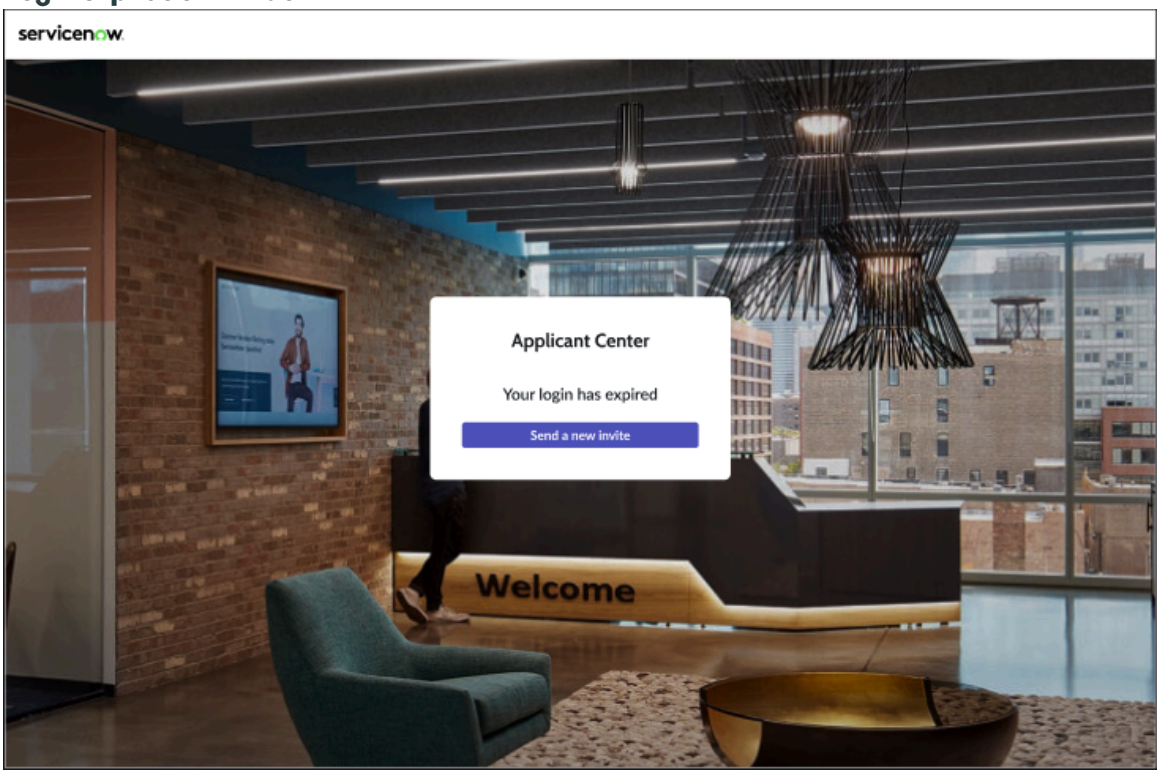
Procedure

1. Go to your registered email address and open the email notification.

   Email notification for the applicant

2. Select **View Applicant Center**.
   The magic link takes you to the Applicant Center home page.
3. If the link expires, select **Send a new invite** from the pop-up window prompt.

   Login expiration window



4. In the **Email** field, enter your registered email address.
5. A new log in email is sent to the registered email address.
6. Select **View Applicant Center** to re-login to the Applicant Center.

Applicant Center home page

Applicant Center is the dedicated and personalized portal for your applicants.

The applicant Center provides the applicants with a wholesome hiring experience.

As an admin, it brings you:

- Customizable header menu items that you can use according to your organizational need.
- Content Experiences that let you curate the journey for your applicant.

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As an applicant, it lets you:

- Track your active and inactive applications, as an applicant, on the application tracking widget.
- Learn which stage of the application you're in along with the date when the application has been moved to the state with the stepper widget.
- View notification after you accept the job offer extended to you on your Applicant Center home page.

Note: You receive a welcome email too on accepting a job offer.

View a job application

Open a job application and see the details.

Open an active job application to view the details. The overview section shows you state, recruiter, location, and work persona.

See the progression of the application along the hiring process on the stepper widget. For more information on the states visible, see Application states for the applicant.

You can also see the following on the page:

- Message a recruiter from the **Message** tab.
- See your hiring team for the application on the **Hiring team** tab, if your recruiter adds the hiring team information to the tab.
- See the job description for the requisition you've applied to on the **Job description** tab.

Share scheduling preferences

As an applicant, when requested by recruiters, share your scheduling preferences to help them schedule interviews accordingly.

Before you begin

Role required: sn_ta_hiring_core.external_applicant or sn_ta_hiring_core.internal_applicant

Procedure

1. Log in to Applicant Center.
   For more information, see Access the Applicant Center.
2. On the Applicant Center home page, under the Keep track of what's going on section, locate the request to share scheduling preferences.
3. Select **Share scheduling preferences**.
   You can also select **Share scheduling preferences** on the email notification you receive once the recruiter has requested to share scheduling preferences.
4. On the Share scheduling preferences for upcoming interview form, fill in the fields.
   For a description of the field values, see Share scheduling preferences form.
5. Select **Share scheduling preferences**.
   Once you've shared your scheduling preferences, you can select **View details** under the Keep track of what's going on section to view or edit the preferences.

Select an interview slot

As an applicant, select an interview slot from a list of proposed slots.

Before you begin

Role required: sn_ta_hiring_core.external_applicant or sn_ta_hiring_core.internal_applicant

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Procedure

1. Log in to Applicant Center.
   For more information, see Access the Applicant Center.
2. On the Applicant Center home page, under the Keep track of what's going on section, locate the proposed interview.
3. Select **Select slot**.
4. Select your preferred time slot.

Note:

- If you don't have Applicant Center activated, you can manually select a slot from the email that you receive after an interview is proposed by replying to the email.
- When selecting a slot, if it's already booked by another applicant, a message indicating the slot is unavailable is displayed.
- If you're not able to find a suitable time slot or the slots have already been booked, you can request for additional time slots or share your scheduling preferences again. For more information, see Request time slots and Share scheduling preferences.

Result

After a slot is selected, an email with the confirmed slot is sent to the recruiter and the hiring team, and the interview is scheduled.

Request to reschedule interview

As an applicant, request to reschedule a proposed or scheduled interview to the recruiter.

Before you begin

Role required: sn_ta_hiring_core.external_applicant or sn_ta_hiring_core.internal_applicant

Procedure

1. Navigate to Applicant Center.
   For more information, see Access the Applicant Center.
2. On the Applicant Center home page, under the Keep track of what's going on section, locate the proposed or scheduled interview.
3. Select **Request reschedule**.
4. On the Reschedule interview form, fill in the fields.
   For a description of the field values, see Request reschedule form.
5. Select **Send**.

Request time slots

As an applicant, request the recruiter to share additional interview time slots if you're unavailable or the proposed slots have been booked.

Before you begin

Role required: sn_ta_hiring_core.external_applicant or sn_ta_hiring_core.internal_applicant

Procedure

1. Navigate to Applicant Center.
   For more information, see Access the Applicant Center.

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2. On the Applicant Center home page, under the Keep track of what's going on section, locate the proposed interview.
3. Select **Select time slot**.
4. On the Availabilities for Recruiter's call page, select **Request time slots**.
5. In the Request time slots pop-up window, specify the reason for requesting additional slots.
6. Select **Send request**.
   The recruiter is notified about the additional time slot request via email and also on the activity stream of the interview record.
7. **Optional:** On the Availabilities for Recruiter's call page, select **Share scheduling preferences** to share your preferences for new slots.
   For more information, see Share scheduling preferences.

Tasks in Applicant Center

Applicant Center provides the applicants with the necessary alerts and means to finish their assigned tasks in the portal.

See all your assigned tasks on the home page of your Applicant Center portal. There is a **View details** button along with the notification on the home page. When you click on it, it redirects you to the **My TO-DOs** tab in the application record page. You can complete the task from the **My TO-DOs** tab.

If you have more than one unfinished tasks assigned to you, all the unfinished tasks are visible on the home page banner on scrolling. You can click on any one to redirect you to the **My TO-DOs** tab, where you can finish all the tasks one by one.

For more information on task-related notifications in the Applicant Center, see Task email notifications for applicants.

Applicant survey

Applicant survey enables the job applicants to provide their feedback about their hiring experience in the Applicant Center.

Improve your hiring process by constantly boosting the hiring experience for your applicants. Let your applicants provide direct and genuine feedback at different levels in the hiring journey.

Applicants can provide feedback on their experience with the organization at the start of the hiring journey. You can configure any kind of feedback experience for your applicants. It can be for their user experience in the Applicant Center portal, their service experience to access any Service Catalog, or a survey feedback after they've gone through the entire hiring process. For more information on configuring feedback, see Integrated experience and service feedback.

When an application moves to the **Interview** State, the applicants receive a survey feedback request. You can configure the feedback requests to be triggered at any other crucial point in the hiring journey. For more information on configuring feedback, see Survey designer.

A **Share feedback** button visible in the Applicant Center home page. The feedback button is also visible in the job application pages.

You can provide your applicants the option to keep their data anonymous and aggregated while taking the survey.

Set accessibility preference

Enable keyboard accessibility for your profile to navigate through the applicant center portal using keyboard tabs.

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Before you begin
Role required: sn_ta_hiring_core.external_applicant or sn_ta_hiring_core.internal_applicant

About this task
Users can tab through the platform UI without enabling accessibility. However, without accessibility enabled, tabbing goes from field to field and skips other items on a form, such as reference icons. For details, see Using accessibility features.

Procedure
1. Navigate to the Applicant Center.
2. Select the avatar and select **Profile**.
3. Turn on the Accessibility enabled toggle switch.

Task email notifications for applicants
The email notifications provide alerts to the applicants when tasks are assigned to them by the recruiters.

An email notification goes to the applicant who is assigned a task. The email has the details of the task along with a **View task** link that is redirected to the Applicant Center.

The task is available in the **My TO-DOs** tab in the application record page.

Receive a reminder email or if the due date is approaching for an incomplete task. The *`Notify Applicants when Due Date is tomorrow`* scheduled job is active by default.

Applicant Center reference
Reference topics provide additional information about the forms, properties, and components in Applicant Center.

Application states for the applicant
An overview of the application states the way the applicants see it.

Application states for applicants

State	Description
Application submitted	The applicant has submitted the application.
In review	The application is in the review stage.
Interview	The applicant is in the interview process.
Offer received	The applicant has received an offer.
offer signed	The applicant has accepted the offer and has signed the offer letter.
Hired	The applicant is hired.
Not selected	The applicant isn't selected for the job requisition.
Withdrawn	The applicant has withdrawn an application.

Components installed with Applicant Center
The following are the components installed with activation of the Applicant Center plugin.

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Scheduled jobs installed

Scheduled job	Description
Notify Applicants when Due Date is tomorrow	Notifies the applicants when they have unfinished, assigned tasks that are approaching due date.

Properties installed with Applicant Center

The system properties installed with the Applicant Center plugin are required to configure different functionalities in Applicant Center.

These properties are available for Applicant Center.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Applicant Center

Property	Description
glide.service_portal.resize_text.ac.enable_rem_conversion	Option to set portal configuration. • Type: true | false • Default value: true • Other possible values: Ignore cache: Selected
sn_ta_applicant.company_career_link	Helps organization to configure the links on the career page to access on the Applicant Center. • Type: String • Other possible values: ○ Ignore cache: Selected ○ Read roles: sn_ta_hiring_core.recruiter ○ Write roles: admin, sn_ta_hiring_core.admin
sn_ta_applicant.company_name_for_applicant	Provides the option to customize it according to the name of the organization. • Type: String • Default value: [Company Name] • Other possible values: Ignore cache: Selected
sn_ta_applicant.privacy_link	Option to add a privacy link.

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Properties for Applicant Center (continued)

Property	Description
	• Type: String • Other possible values: ○ Ignore cache: Selected ○ Read roles: sn_ta_hiring_core.admin, sn_ta_hiring_core.applicant ○ Write roles: admin, sn_ta_hiring_core.admin
sn_ta_applicant.sn_ta_applicant_onboarding_state	Property indicates the state when onboarding journey starts. • Type: String • Default value: 50,60 • Other possible values: Ignore cache: Selected

Request reschedule form

The request reschedule form provides the field descriptions required for an applicant or interviewer when requesting a recruiter to reschedule an interview.

Reschedule interview

Field	Description
Select reason for reschedule	Reason you're requesting to reschedule the interview for.
Manually share slots	Option to manually add slots and share with recruiter.
Use my calendar	Option to enable recruiters to schedule interviews based on your calendar availability. **Note:** This option is available only for interviewers.
Select time zone	Time zone for which you're suggesting time slots.
Start date and time	Earliest date and time that you're available for interviews. This field appears only when **Manually share slots** is selected.
End date and time	Last date and time of the period until which you're available. This field appears only when **Manually share slots** is selected.

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Reschedule interview (continued)

Field	Description
All day	Option to share your availability for an entire day. The end date is automatically set to the start date that you select. This field appears only when **Manually share slots** is selected.
Recurring	Option to share your availability for recurring time period. This field appears only when **Manually share slots** is selected.
Repeat	Frequency of recurring availability you're sharing. The available options are **Daily**, **Weekly**, and **Monthly**. This field appears only when **Manually share slots** is selected.
Days	Days of the week when you're available. This field appears only when **Manually share slots** is selected, and then **Weekly** is selected from **Repeat**
Lasts	Select either **for** or **until** to specify until when your shared availability lasts. This field appears only when **Manually share slots** is selected
Number of days/weeks/months	Number of days/weeks/months you're sharing availability for. This field appears only when **Manually share slots** is selected, and then **for** is selected from **Lasts**.
Ends on this date	End date of the recurring availability you're sharing. This field appears only when **Manually share slots** is selected, and then **until** is selected from **Lasts**.
Add time slot	Add the selected time slots. This field appears only when **Manually share slots** is selected
Available time slots	Suggested time slots that recruiter can pick from when rescheduling the interview. You can edit or delete these time slots. This field appears only when **Manually share slots** is selected

Opportunity Marketplace

Opportunity Marketplace enhances career mobility. It provides employees an intuitive experience to explore career opportunities. Customizable match preferences are seamlessly integrated with your Applicant Tracking System (ATS) to enhance employee engagement with transparent and efficient career development.

Opportunity Marketplace enables the creation, posting, and tracking of several types of opportunities. Base system opportunities include:

- **Internal jobs**
- **Projects**

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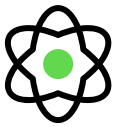
- **Gigs**
- **Volunteer**

You can also create custom opportunities. For more details about custom opportunities, see Creating custom opportunity types in Opportunity Marketplace.

Explore	Install and configure	Using
 Learn more about Opportunity Marketplace	 Install the Opportunity Marketplace (OPM) app from the ServiceNow Store. As an administrator you can configure OPM features.	 Talent Development Users access OPM from the Employee Center portal to view, manage, and track job opportunities.
	Reference  View technical details of the installed tables, roles, and other related Opportunity Marketplace technical information.	

Explore Opportunity Marketplace (OPM)

Manage opportunities for long-term or short-term projects that are available at your company. Employees can find and track opportunities while managers can post opportunities for projects, gigs, volunteer opportunities, and internal jobs.

User criteria added to opportunities by owners control the visibility of the opportunity to potential applicants.

Internal jobs

Opportunity Marketplace enable you to create, publish, and maintain internal job posting. You can explore open roles (positions) within your company.

Recommendations are based on your current role (job position), aspirations, and skills.

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Internal jobs are tracked in the Job Posting [sn_ta_hiring_core_job_posting] table. You can view the best match analysis based on your current role, aspirations, or skills.

Artificial Intelligence (AI) is used in search to make sure the most relevant opportunities are returned.

Opportunity Marketplace best fit recommendations

Based on your current roles, aspirations, and skills Opportunity Marketplace (OPM) recommends opportunities for you.

Based on your current role

OPM looks at your current role and skills then compares it to the available published opportunities.

Within an opportunity you can see more information related to your role and what is used in making the recommendation. Select **Match analysis** to view details about how you were matched to the opportunity. Select **View details** to view information about the opportunity.

Based on your aspirations

OPM reviews any aspirations that you created in Talent Development and identifies potential opportunities that match with your aspirations.

Based on your skills

The OPM recommender looks at the skills that are in your profile to compare your skills needed for the opportunities.

You can read more about best fit recommendations and match analysis in these topics:

- View an opportunity match analysis

  Opportunity Marketplace (OPM) generates match analyses based on your current role, aspirations, and skills. Match analysis is based on your skills and preferences.

- Set opportunity preferences

  Opportunity preferences are used to evaluate which opportunities are best for you.

- Career tab in Employee Center

  View, update, and manage all aspects of your career using the Career tab in Employee Profile. Opportunity Marketplace looks at to skills to identify opportunities for you.

Gig opportunities

Gigs have a single role with one or more vacancies. Gigs and other opportunity types are configured by ServiceNow admins from the Opportunity Type Configuration form.

Gigs refer to temporary jobs that involve well-defined tasks or projects. Gigs are flexible opportunities that can be short-term or long-term employment contracts. Gigs enable companies to find specialized skills or to scale their workforce according to project demands without committing to long-term resource commitments. For more information about opportunity types, see .

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Project opportunity

Projects facilitate creating a team consisting of multiple roles filled by multiple people. Projects can be broad in scope and be long-term or short-term in duration. Projects and other opportunity types are configured by ServiceNow admins from the Opportunity Type Configuration form.

Projects are temporary opportunities, but they can be either long-term or short-term in duration. Projects enable areas of career growth and development that can help employees gain visibility and experience. Projects can be customized to fit your needs.

- Demonstrate skills
- Innovate processes and deliverables
- Solve complex problems
- Demonstrate the ability to handle responsibility
- Lead teams

Projects enable managers to pull quickly from an available pool of resources and skills. For more information about opportunity types, see .

Volunteer opportunities

Opportunities to volunteer can include multiple roles and skills for multiple people volunteering for activities related to the opportunity. Scope and duration can be long-term or short-term. Volunteer opportunities and other opportunity types are configured by ServiceNow admins from the Opportunity Type Configuration form.

Volunteer opportunities are positions or roles to which individuals offer their time and skills without expectation of compensation. Volunteer opportunities have many benefits.

- Contribute to a community (Give back!)
- Gain experience
- Develop personal and professional skills

Volunteer opportunities are often found in non-profit organizations, community groups, and other service-oriented entities. They can also be work opportunities that are outside an individual's normal scope of activities.

Engaging in volunteer work enables individuals to contribute to their community, gain experience, and develop personal and professional skills. Volunteer opportunities can vary widely, from short-term events to long-term commitments, and they often provide a platform for networking, learning, and personal growth. For more information about opportunity types, see .

Opportunities you own in Opportunity Marketplace

From the Opportunities you own page in Opportunity Marketplace you can create, manage, and monitor opportunities. User criteria enables access to creating and updating opportunities.

Select a category to view a list of opportunities and applicants. Further refine the list of opportunities by filtering on the **Opportunity type**, **Status**, or **Sort by** filters and supports text search.

All opportunities

Select **All opportunities** to view a list of all the opportunities that you own. The **Opportunity title** links to the opportunity details page.

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New applicants

Select **New applicants** to view opportunities that have new applications that have not been reviewed.

Accepting applicants

Select **Accepting applications** to view a list of active opportunities that employees can apply to.

Opportunity publishing approval

The Opportunity Marketplace's publishing approval framework streamlines the approval process, allowing Opportunity Owners to submit drafts for approval and receive notifications upon approval or rejection.

In versions 2.3 and later, Opportunity Marketplace includes an out-of-the-box framework to automate the publishing approval workflow for the gig, volunteer, and project opportunity types.

- The Opportunity Owner can submit a draft opportunity for approval from the Create an opportunity form and monitor the status of the approval request. They receive an email notification when the Opportunity Approver approves or rejects the draft.
- The Opportunity Approver is notified of the approval request via email and an assigned approval task. They can review the opportunity draft and either approve or reject with comments from the notification interface.
- Admins can configure approver users and additional approval rules.

Approval workflow

Each out-of-the-box opportunity type (gig, volunteer, and project) has a respective subflow to facilitate the approval workflow. Each subflow has default configurations, which determine the conditions under which the opportunity is sent for approval.

1. If the conditions are met, the subflow requests approval from the users listed in the Opportunity Type Auxiliary [sn_opp_market_opportunity_type_aux] table for that respective opportunity type.
2. If an approver approves the opportunity, the system notifies the Opportunity owner and publishes the opportunity.
3. If the approver rejects the opportunity, the system reverts the opportunity to draft state and notifies the Opportunity owner of the approver's feedback, which they can implement and resubmit for approval.

Note: By default, only one approval is necessary for the system to publish an opportunity, and only one rejection is necessary to prevent an opportunity from being published, however the admin can configure alternative approval scenarios, such as requiring a greater number of required approvals or at minimum two rejections. For more information, see the **Approvers** section below.

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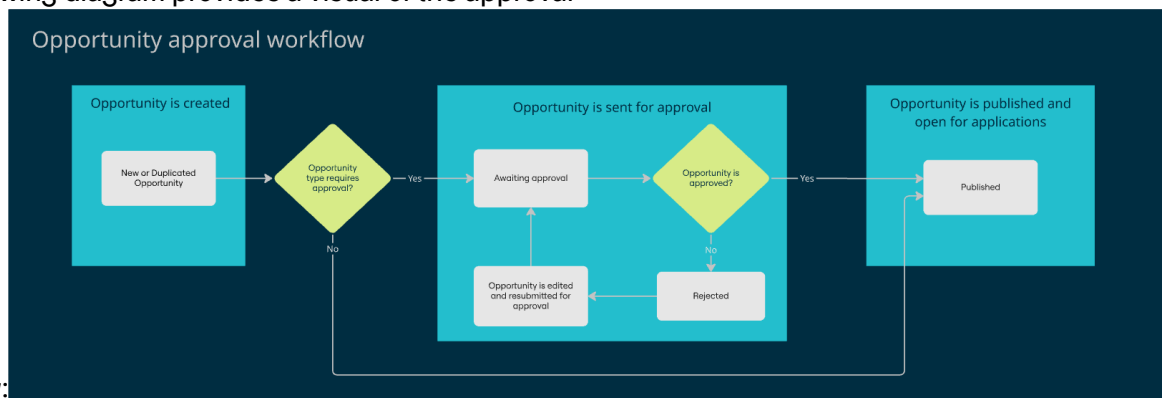
The following diagram provides a visual of the approval workflow:



The following describes the default configurations for the subflows, which can be modified in the Workflow studio.

Default settings for out-of-the-box subflows

Subflow	Settings description
Gig opportunity posting & editing approval	This subflow sends the opportunity for approval if it requires a time commitment of 20 or more hours per week (line 2). Unlike the other two subflows, this one assigns the opportunity owner's manager as the approver (line 7-10) in addition to the listed approvers.
Volunteer opportunity posting & editing approval	This subflow requires approval for the opportunity if the total number of participants is twenty or more (line 1).
Project opportunity posting & editing approval	This subflow requires approval for the opportunity if the total number of participants is five or more (line 1).

Note: Only the `Project opportunity posting & editing approval` flow is assigned to the project opportunity type out-of-the-box; for volunteer and gig opportunity types, the admin must manually assign the flow. For the steps on assigning the approval flows, see .

For custom opportunity types, the admin can reuse either the `Project opportunity posting & editing approval` or `Volunteer opportunity posting & editing approval` flows, as they support opportunities with multiple roles.

Approvers

If your instance has demo data loaded, the group `OPM Opportunity Approvers` is assigned to the gig, volunteer, and project opportunity types. An admin can add users to the `OPM Opportunity Approvers` group to review all opportunity drafts. Alternatively, the admin can define approvers for a specific opportunity type. For the steps on assigning approvers to an opportunity type, see step 4 of .

While the default subflow requires only one approval or rejection, the admin can configure alternative approval scenarios, such as requiring a greater number of required approvals to

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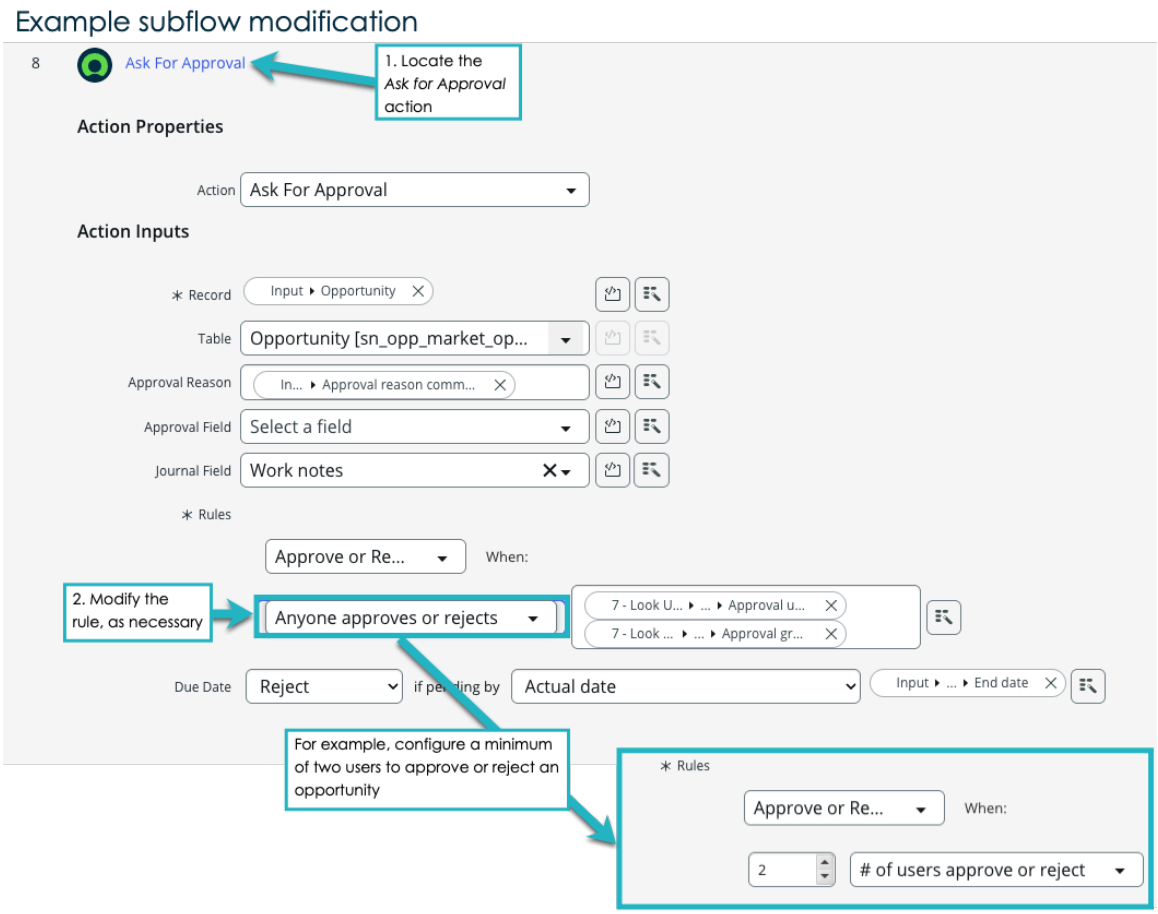
publish an opportunity or at minimum two rejections to prevent the opportunity from being



published.

Install and configure Opportunity Marketplace

Admins install and configure the Opportunity Marketplace (OPM) application and configure features.

Follow these steps to configure Opportunity Marketplace:

1. Install Opportunity Marketplace
2. Assign the `sn_opp_market.admin` role to users so they can configure and manage Opportunity Marketplace
3. Provide employees with licenses to access OPM features: License Talent Development Core users
4. (Optional) Users with the `sn_opp_market.admin` role can create Custom Opportunity Types

Install Opportunity Marketplace

Opportunity Marketplace (OPM) is a key application that works as part of the Talent Development suite of applications. OPM improves employee engagement and retention with internal mobility.

Before you begin

Opportunity Marketplace has the following dependencies. When you install OPM it activates or installs the following:

Note: Opportunity Marketplace installs the latest required versions of dependent apps and plugins.

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- Talent Development Core
- Manager Hub
- Skills Foundation
- Finance Common Architecture
- Hiring Core
- Proactive Prompts
- Talent Development Shared Library [app-egd-shared-library]

> **Note:** The shared library isn't visible in the ServiceNow Store, but the latest required version is installed with OPM.

Role required: admin

Procedure

1. Go to the ServiceNow Store and find the Opportunity Marketplace [sn_opp_market] application using the filter criteria and search bar.
2. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. If demo data is available and you want to include it, select the **Load demo data** check box.

   Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
5. Select **Install**.

View and manage the opportunities created in Opportunity Marketplace

Opportunities are created to solicit individuals to apply for roles within the opportunity. As an Opportunity Marketplace admin [sn_opp_market.admin], you can view and manage opportunity records from the ServiceNow platform.

Before you begin

Role required: Opportunity Marketplace admin [sn_opp_market.admin]

About this task

There are times that opportunities must be updated by someone other than the opportunity owner. Having the role of Opportunity Marketplace admin [sn_opp_market.admin] enables you to update opportunities without being the opportunity owner.

> **Tip:** While admins can view and update opportunities, it is recommended that opportunity creators and owners view and update opportunities from Opportunity Marketplace in the Employee Center.

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Procedure

1. Navigate to **All** > **Opportunity Marketplace** > **Opportunities**.
   Opportunities records contain several fields. Here are some of the fields that help you to identify opportunities. Some of the listed fields are linked to their respective records for the applicant.

Important role applicant fields and descriptions

Field	Description
Title	The title of the opportunity that applicants and opportunity owners see when looking at opportunities.
Opportunity type	There are 3 opportunity types that come with the base system. ○ **Gig** ○ **Project** ○ **Volunteer** As an admin, you can add custom opportunity types, see .
State	The **State** of an opportunity indicates where an opportunity is in the approval process. ○ **Canceled** ○ **Closed** ○ **Complete** ○ **Draft** ○ **Edited** ○ **Published**
Published date	The date that the opportunity is available to applicants.

2. Select an opportunity.
3. Update any field that must be changed.
4. Select **Update**.

View and manage role applicants from Opportunity Marketplace

Role applicants are employees who have applied to a role that is part of an opportunity. As an Opportunity Marketplace [sn_opp_market.admin], you can view and manage role applicant records.

Before you begin

Role required: The creator or owner of the opportunity.

Procedure

1. Navigate to **All** > **Opportunity Marketplace** > **Role Applicants**.
   The role applicant records contain several fields. Here are some of the fields that help you to identify a role applicant. The listed fields are linked to their respective records for the applicant.

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Important role applicant fields and descriptions

Field	Description
Employee	The names of the applicants links to their **Employee Profile**, see Employee Profile table.
Role	A role that is listed in an opportunity. Opportunities can 1 or more roles depending on the opportunity type.
State	The **State** of a role applicant indicates the progression of the applicant in the process. ○ **New applicant**: A new applicant that hasn't been looked at by the opportunity owner. ○ **Pending review** The opportunity owner has not yet viewed the applicant's information. ○ **Accepted** An applicant that has been accepted for the role in an opportunity. ○ **Declined** An applicant that has been declined for a role. ○ **Canceled** An applicant that is no longer part of the opportunity role review process.

2. Select the field that you want to update.
3. Select the green check mark to apply and save your changes.

Add a role applicant to an opportunity role

Role applicants are employees who have applied to a role that is part of an opportunity. As an Opportunity Marketplace admin [sn_opp_market.admin], you can add role applicants to an opportunity role.

Before you begin

Role required: Opportunity Marketplace [sn_opp_market.admin]

Procedure

1. Navigate to **All** > **Opportunity Marketplace** > **Role Applicants**.
2. Select **New**.
   - **Employee**
   - **Role**
   - **State**
   - **Submission message**
   - **Work notes**
3. Select the **Employee** from a list of employees with active profiles.
4. Select the **Role** from a list of roles that are available to applicants.
5. Select the appropriate **State** for the applicant.
6. Enter a **Submission message** on behalf of the applicant.

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7. Add **Work notes** if you want the opportunity owners to have additional information about the applicant.
8. Select **Submit**.

Creating custom opportunity types in Opportunity Marketplace

Opportunity Marketplace comes with 3 base system **Opportunity types**. If you need a different opportunity type, you can create custom opportunity types to meet the needs of your organization. You can also create custom user criteria, opportunity details, and roles and requirements.

There are several fields that make up an **Opportunity type** record. To read details about **Opportunity type** fields, see Opportunity Type Configuration for Opportunity Marketplace.

There are 2 of the fields that are included in the **Service Catalog Catalog Definitions Record Producers** table.

- **Roles and requirements**
- **Opportunity details**

The quickest way to create custom versions of these tables is to copy an existing record and make updates to customize it to your needs.

Create a custom opportunity type

Opportunity Marketplace comes with a few base system opportunity types. You can create a custom opportunity type to meet the needs of your organization.

Before you begin
Role required: admin

About this task
You can customize several areas for an opportunity type or use existing records. If you plan to create custom **User criteria**, **Opportunity details**, or **Roles and requirements**, you should create them before creating your custom **Opportunity type**.

Procedure
1. Navigate to **All** > **Opportunity Marketplace** > **Opportunity Type Configuration**.
2. Select **New**.
3. In the **Title** field, enter a name for your **Opportunity type**.
4. From the **Role display** list, select how you want to embed roles in the opportunity type.
   - **Embedded within opportunity (1 position only)**
   - **Separate from opportunity (1 or more positions)**
5. Select a **User criteria** record to restrict access to a group of people that match that user criteria.
   Leave the field empty if you want to enable access to all licensed Opportunity Marketplace users. To create custom user criteria, see Create a user criteria record in Service Catalog.
6. Select and existing **Opportunity details** record.
   If you want a customized **Opportunity details** record, see Create custom opportunity details records in Opportunity Marketplace.
7. Select an existing **Roles and requirements**.
   If yo want a customized **Roles and requirements** record, see Create custom roles and requirements in Opportunity Marketplace.

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8. Add a description for your **Opportunity type**.
9. If you want an icon to display for your **Opportunity type**, select **Click to add**.
   You can also add links for help topics. The help appears at the bottom of the **Create an opportunity** page in the Employee Center under **Opportunities you own**.
10. Select **Submit**.

Select or create user criteria

Opportunity Marketplace user criteria are maintained in the Service Catalog under Catalog Definitions. There are several user criteria records to select from, or you can create your own user criteria.

User criteria records are contained in the **Opportunity** [sn_opp_market_opportunity] table. To create custom user criteria, see Create a user criteria record in Service Catalog.

Note: When you create user criteria records from an application, the **Application** field shows the associated app.

Create custom opportunity details records in Opportunity Marketplace

You can customize the details for an opportunity type in Opportunity Marketplace.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Opportunity Marketplace** > **Opportunity type configuration**.
2. Select an existing **Opportunity type**.
3. Open an existing **Opportunity details** record.
   a. Select the information icon next to the **Opportunity details** field to preview the record.
   b. Select **Open Record**.
   You're taken to the **Record Producer** record for the opportunity roles and requirements.
4. Select **Copy**.
   A copy of the record is created. Copying this record can take sometime.
5. When a copy of the record is available, update the following fields.
   - **Name**
   - **Short description**
6. Review and update any other fields you want to change.
7. Select **Update**.

What to do next
The copied (cloned) opportunity details record is available to select by opportunity owners.

Create custom roles and requirements in Opportunity Marketplace

Create custom roles and requirements to meet the needs of your organization.
Roles and requirements are maintained as records in the **Opportunity role** [sn_opp_market_opportunity_position] table.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Opportunity Marketplace** > **Opportunity type configuration**.
2. Select an existing **Opportunity type**.
3. Open an existing opportunity roles and requirements record.
   a. Select the information icon next to the **Roles and requirements** field to preview the record.
   b. Select **Open Record**.
   You're taken to the **Record Producer** record for the opportunity roles and requirements.
4. Select **Copy**.
   A copy of the record is created. Copying this record can take sometime.
5. When a copy of the record is available, update the following fields.
   - **Name**
   - **Short description**
6. Review and update any other fields you want to change.
7. Select **Update**.

Use Opportunity Marketplace

Employees in your company use Opportunity Marketplace to find opportunities, apply for roles in the opportunity, and track the application process. Some employees create and publish opportunities to gather and evaluate resources for gigs, projects, and volunteer opportunities.

To access and use Opportunity Marketplace, you must be a licensed Opportunity Marketplace user. For more information, see License Talent Development Core users.

Access to opportunities is controlled by user criteria defined in the opportunity. Only opportunities for which you match the user criteria are visible.

Share an internal job opportunity

Share internal job opportunities with your coworkers.

Before you begin
Role required: None

Note: Access is based on user criteria.

About this task
Sharing internal jobs enables you to connect with coworkers within the organization.

Procedure

1. From the Employee Center **Opportunity marketplace** > **Internal jobs**.
2. Locate any **Internal job** post.

   Note: Internal job posts are available from multiple locations.

3. Populate a list of names by selecting **Search by name**.
4. Select the name of the person that you want to share the opportunity with.
5. **Optional:** Add a personal note.
6. Select **Share opportunity**.

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Result
The opportunity is sent to the coworker that you shared it with.

What to do next
When you share an opportunity with a coworker, you and the person you share the opportunity with receive an email notification that the job was shared.

Update Job Preferences

Make updates to your job preferences to help you apply for opportunities. Your job preferences are used by Opportunity Marketplace to do a match analysis with roles.

Before you begin
Role required: None

Note: Access is based on user criteria. You must be an OPM licensed user.

About this task
Your job preferences are used to make accurate recommendations for you. Opportunity Marketplace enables you to update your internal job preferences for different roles within the organization.

Updating your internal job preferences let's you apply for roles related to your preferences.

Procedure
1. From the Employee Center go to **Opportunity Marketplace** > **Internal jobs**.

   Note: **Internal jobs** is used as an example for this task. You can also update opportunity preferences from **Other opportunities**.

2. Select **Edit Preferences**.

   Opportunity preferences are configured by your organizations administrator. You can see different preferences depending on the opportunity and how your organization configures the opportunity.

Opportunity preferences

Field	Description
Which working style do you prefer?	Working styles are configured for the opportunity type. Your organization can have different opportunity types.
How much travle are you comfortable with?	This fields is asking you to give an amount of your time that you are willing to travel for this opportunity. This field is configured in the **Opportunity type** by an administrator. Your organization may have different preferences.
Which job levels are you interested in?	Job levels are configured by you organizations administrator. Job levels can be specific for you organization.
Which work locations do you prefer?	Select from the list of available job locations. Job locations are configured as part of the **Opportunity type**. Locations will depend on

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Field	Description
	how your organization has configured the opportunity type.

3. Select **Save and close**.

What to do next
Continue to apply for jobs based on your updated preferences.

Create opportunities in Opportunity Marketplace

Opportunity owners create gigs, projects, and volunteer opportunities. Opportunity details for Project type opportunities can be imported from projects in the ServiceNow Project Workspace. These opportunities are different from internal jobs. OPM enables you to manage any opportunities you create and track applications. The ability to create opportunities is based on user criteria.

Before you begin
Role required: No role required, but you must be a licensed user for the Talent Development features.

Note: Access is based on user criteria.

Procedure
1. From the Employee Center, go to **Opportunity Marketplace** > **Opportunities you own**.
   Any existing opportunities that you own are listed. For the first opportunity you create, you see the message **No opportunities yet**.
2. Select **Create an opportunity**.
   The **Create an opportunity** widget is started. There are 3 opportunity templates provided with the base system. If you need a different opportunity type, you can create your own custom opportunity types.

   Note:

   Access to create custom opportunities is controlled by user criteria maintained in the Opportunity Type table [sn_opp_market_opportunity_type].

   Creating and editing of opportunity, position, or application table records from lists and forms can result in unwanted behavior. Lists and forms should be updated from the Employee Center portal.

   - Gig: For details on gigs, see Gig opportunities.
   - Project: For details about what a project is, see Project opportunity
   - Volunteer: For details about what a volunteer opportunity is, see Volunteer opportunities

   Tip: If you need a different opportunity type, you can create custom opportunity types. For more details, read Creating custom opportunity types in Opportunity Marketplace.

3. Select a template, then select **Next**.
4. Fill in the form with the details for the opportunity that you selected.

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a. From the **Opportunity owner** list, select co-owners to an opportunity to enable management of the opportunity.
The user who creates the opportunity is by default the owner of the opportunity. You can add additional owners by selecting users from the list.

b. From the **Who can view this opportunity?** list, select one or more groups to enable members of the group to view the opportunity.

User criteria control who can view opportunities. Leaving this field empty, enables everyone in your organization to see the opportunity. Select user groups to restrict access to the members of the selected groups.

For information about creating user groups, see Create a user group.

To read details about the opportunity forms and fields, see Form fields for creating opportunities in Opportunity Marketplace.

5. Select **Next**.
6. Select **Add a role**.

Note: Because a gig can contain only one role, adding additional roles isn't available for Gig opportunities.

7. Fill in the form with the role details.
To read more details about the role form and fields, see Form fields for creating opportunities in Opportunity Marketplace.
8. Review the details of your opportunity.
Select the **Edit** icon if you must change any of the details.
9. When you're satisfied with your opportunity, select **Publish**.
You may be prompted to **Submit for approval** instead. This occurs when the opportunity meets specific conditions, requiring approval prior to publishing. For more information, see Opportunity publishing approval.

Create opportunities in Opportunity Marketplace by importing projects from Project Workspace

Import details from a Project Workspace project file to create a related opportunity in Opportunity Marketplace.

Before you begin
Role required: Must be a licensed OPM user and have the [sn_ppm_read] and [resource_user] roles.

Note: Access is based on user criteria.

About this task
You must have Project Workspace installed and configured to create opportunities from project files. See, Project Workspace.

Procedure
1. From the Employee Center, go to **Opportunity Marketplace** > **Opportunities you own**.
Any existing opportunities that you own are listed. For the first opportunity you create, you see the message **No opportunities yet**.
2. Select **Create an opportunity**.

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The **Create an opportunity** widget is started.

Note:

Access to create custom opportunities is controlled by user criteria maintained in the Opportunity Type table [sn_opp_market_opportunity_type].

3. Select **Create using an existing project**.
4. Select **Next**.
5. Select a project from the list.
   Start entering text in the **Search for a project...** field to search for available projects.
6. Select **Next**.
7. Fill in the form with the details for the opportunity that you selected.

Form fields for creating an opportunity

Field	Description
Opportunity owner	You're listed as the owner of opportunities that you create. You can add additional co-owners from the list. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Project title **Note:** The name for this field varies depending on the opportunity type.	A project title is visible to users and it's used to help in the search for available opportunities. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Project description **Note:** The name for this field varies depending on the opportunity type.	Include all relevant details for an opportunity. Add the details of opportunities to help potential applicants decide whether they want to apply for the opportunity. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Start date	The beginning date for the role. This field is in the **Opportunity** table[sn_opp_market_opportunity].
End date	The end date for the opportunity. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Who can view this opportunity?	Select from the list to make the opportunity visible to different groups of applicants. Leaving the field empty makes the project visible to everyone.
Additional details	Add additional details that an applicant might want to learn about or want to understand.
Add attachments	Attachments can include related information such department details of the team an applicant would be working with or more extensive details about gigs, projects, or volunteer opportunities. Attachments are

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Field	Description
	attached to the corresponding opportunity record.

a. From the **Opportunity owner** list, select co-owners to an opportunity to enable management of the opportunity.
The user who creates the opportunity is by default the owner of the opportunity. You can add additional owners by selecting users from the list.

b. From the **Who can view this opportunity?** list, select one or more groups to enable members of the group to view the opportunity.

User criteria control who can view opportunities. Leaving this field empty, enables everyone in your organization to see the opportunity. Select user groups to restrict access to the members of the selected groups.

For information about creating user groups, see Create a user group.

8. Select **Next**.
9. Select **Add a role**.
10. Fill in the form with the role details.
To read more details about the role form and fields, see Form fields for creating opportunities in Opportunity Marketplace.
11. Select **Add role to team**.
12. Select **Next**.
13. Review the details of your opportunity.
Select the **Edit** icon if you must change any of the details.
14. When you're satisfied with your opportunity, select **Publish**.

Set opportunity preferences

Set your preferences for opportunities so that your preferences match any opportunities you're interested in.

Before you begin

Role required: none

Note: Access is based on user criteria.

Procedure

1. From the Employee Center go to **Opportunity marketplace** > **Other opportunities**.
2. Select **Edit preferences**.

Opportunity preference settings

Field	Description
Which working style do you prefer?	Select your preferred work style. You can select more than a single work style. Not selecting any work style indicates that you're open to all work styles.

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Field	Description
	○ **Onsite** ○ **Remote** ○ **Hybrid**
How many hours per week are you looking to commit?	Enter the number of hours that you're willing to work on an opportunity. The value for this field is for an entire work week.
Which job levels are you interested in?	Select all of job levels that you're interested in. You can select both individual contributor (IC) and manager (M) job levels. ○ **IC1 - IC4** ○ **M1 - M2**
Which work locations do you prefer?	Select the field and then select a listed location. You can select more than one location.
Save and close	Save and close the preferences form to make your preferences immediately available.

3. Select **Save and close** to save your selections and make the immediately available for opportunities.

View an opportunity match analysis

Opportunity Marketplace (OPM) generates match analyses based on your current role, aspirations, and skills. Match analysis is based on your skills and preferences.

Before you begin
Role required: none

Note: Access is based on user criteria.

About this task
Only opportunities that match the opportunity's user criteria and have been published are evaluated for match analysis.

OPM provides helpful analyses and recommendations for available opportunities, and it enables you to view the details for the recommended opportunities.

Procedure
1. From the Employee Center go to **Opportunity marketplace** > **Other opportunities**.
2. In an opportunity card, select **Match analysis** to view details about the match.

   Match analysis is based on matched skills and preferences. Skills make up 80% of the match analysis and 20% comes from your preferences. It's important to keep your preferences and skills current so that the match analysis finds relevant opportunities. For more information about skills, see Using Skills Foundation.

   The different sections of the analysis display information about the match.

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- **How your skills match this opportunity** shows skills that match the requirements of the opportunity, and it gives you recommendations for skills you can work on to improve your match with the opportunity.
- **How your preferences match this opportunity** shows the settings that are configured in your OPM preferences.

3. In an opportunity card, select **View details** to the recommended opportunity.
   From the opportunity, you can view your **Match analysis** and **Sign up** for the opportunity.

Sign up (apply) for an opportunity

Apply for an opportunity from the opportunity details page.

Before you begin

Role required: none

Note: Access is based on user criteria.

About this task

Once you find an opportunity that you're interested in, you must sign up and apply for the opportunity.

Procedure

1. From the Employee Center go to **Opportunity marketplace** > **Other opportunities**.
   Look at the opportunities on the **Other opportunities** page to find the opportunity role you want to apply for.

   Tip: Select the heart next to the vertical ellipses to add the opportunity to **Your Favorites** tab in the in the Employee Center portal.

2. Select **View details** for the opportunity role that you're interested in applying for.
   Opportunities with multiple roles don't display the **View details** button. You must open the opportunity and select **View details** for a role in the opportunity.
3. From the role details page, select **Sign up**.
4. Fill in the form to apply for the opportunity role.

Role application form

Field	Description
Craft a note	Write a note to send to the owner of the opportunity.
Your skills	Your available skills are automatically added to the opportunity. If no skills are listed, you can add skills to your profile before you submit the application.
Your experience	This section enables you to add more relevant details about your experience by adding files and links to the application. ○ Add attachments ○ Add links

5. Select **Sing up and apply** to submit your application to the opportunity owners.

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Manage job postings in Opportunity Marketplace

Job postings must be created and managed directly in the Job Posting [sn_ta_hiring_core_job_posting] table.

Before you begin

Role required:

- sn_ta_hiring_core.admin
- sn_ta_hiring_core.recruiter
- admin

About this task

The Job Posting [sn_ta_hiring_core_job_posting] is contained in the Hiring Core application. The Job Posting table stores and tracks hiring information that you create or received from third party talent acquisition platforms for your hiring requirements.

You must create job postings from the Job Posting [sn_ta_hiring_core_job_posting] table. You must have one of the roles listed in Role required.

Procedure

1. Navigate to **All**.
2. In the **Filter** field, enter `sn_ta_hiring_core_job_posting.list`.
3. Select **New**.
4. Fill in the **Job Posting New record** form.

   The **Number** field is automatically filled with the next job posting number. Here's a list of some of the important fields needed for job postings. This list of important fields isn't exhaustive. There are many other fields available. Use the fields that meet your requirements for a job posting.

   ### Important job posing fields

Field	Description
Job board	An online platform or website where companies post job openings and job seekers can search for and apply to these positions. Job boards can be internal or external sites.
Title	The title of the job that applicants see in the internal job posting.
Scheduled start date	The date the job starts.
Country	The country location where the job is available.
Location flexibility	The available types of roles for working, for example

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Field	Description
	○ Flexible work environment: An open environment to meet individual needs. ○ Hybrid work environment: An environment where you can work in more than one location such as in office or from home. ○ In-office work environment: An environment where you must be in the office for the entire work time.
Posted by	The person who posted the internal job in OPM
Job requisition	The job requisition number used by OPM for tracking. Job requisitions can have multiple associated job postings. **Note:** Job requisitions aren't required for posting a job.
State	An indication of where the job posting is in the process of managing job postings.
Job qualifications	A list of qualifications that applicants see for the job posting. These qualifications are searchable by applicants.
Posting date	The date that the job posting is published so that it's visible to applicants.
Posting description	A short description of the job that can be searched so that applicants can find jobs that meet their requirements.
Preferred skills	A list of skills that are preferred but not required. This field is an applicant searchable field.
Required skills	The minimum skills that are needed for this job. This field is applicant searchable.
Travel requirement	An estimate of the amount of time travel required for this job.

View job postings in Opportunity Marketplace

Job postings forms can be viewed from the Job Posting [sn_ta_hiring_core_job_posting] table.

Before you begin

Role required: All Opportunity Marketplace users

About this task

The Job Posting [sn_ta_hiring_core_job_posting] is contained in the Hiring Core application. The Job Posting table stores and tracks hiring information that you create or received from third party talent acquisition platforms for your hiring requirements.

You must view job postings forms from the Job Posting [sn_ta_hiring_core_job_posting] table.

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Procedure

1. Navigate to **All**.
2. In the **Filter** field, enter `sn_ta_hiring_core_job_posting.list`.
3. Select a job posting to view.
   Depending on how your list view is configured, select a field label that links to the job posting.
4. You can only view the form for the selected job posting.

Reference Opportunity Marketplace roles and tables

Roles help to control access to features. Tables are used to store application data used by Opportunity Marketplace (OPM) features and interaction with other applications.

Related application reference topics

Reference information provides additional information about some of the technical details related to the application. Here are some reference topics for applications related to OPM.

- Talent Development Core application reference
- Skills Foundation Reference
- Career Conversations reference
- Learning reference
- Mentoring reference
- Employee Goals reference

Opportunity Marketplace reference topics

These topics provide information about OPM features and technical details.

Components, tables, and roles used by Opportunity Marketplace (OPM)

Learn about the components used with Opportunity Marketplace.

Opportunity Marketplace roles and tables

You can configure which columns are visible in forms. Select the gear icon in the header of the form to personalize which columns you want to see and how they're formatted.

Important: The descriptions in these tables don't contain all available fields. Select the gear icon in the header of the form to see all available fields.

Opportunity Marketplace roles

Role title [name]	Description
Admin [sn_opp_market.admin]	The OPM admin role enables access to the administrative modules for the app. The OPM admin role contains these roles. • `[sn_egd_shared_lib.admin]` • `[flow_designer]` • `[user_criteria_admin]`

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Opportunity Marketplace tables

Table label [name]	Description

Opportunity [sn_opp_market_opportunity]	Tracks details about an opportunity, such as
	• **Title**
	• **Opportunity type**
	  ○ **Gig**
	  ○ **Project**
	  ○ **Volunteer**
	• **State**
	• **Owners**
	• **Published date**

Opportunity Location Mapping [sn_opp_market_m2m_opp_location]	Tracks details about the location of the opportunity • **City** • **Country** • **Location**
Opportunity position [sn_opp_market_opportunity_position]	Tracks information about the job (opportunity) that is available, such as • **Title** • **Opportunity** • **Description** • **Location** • **Employee levels**
Opportunity Type Auxiliary [sn_opp_market_opportunity_type_aux]	Holds the names of approvers for an opportunity type
User Opportunity Preference [sn_opp_market_user_opportunity_preference]	Tracks the user preferences of an applicant, such as • **Configuration item** • **Employee** • **Table**: The table that contains details related to the opportunity preference configuration item.
Opportunity Preference Configs [sn_opp_market_opportunity_preference_config]	Tracks the details of the opportunities, such as • **Display name** • **Name** • **Active** • **Type**

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Opportunity Marketplace tables (continued)

Table label [name]	Description
	• **Table** • **Field**
Opportunity Type [sn_opp_market_opportunity_type]	Tracks details about opportunities (Gig, Project, Volunteer), such as • **Title**: The type of opportunity. The standard opportunities provided with OPM are Gig, Project, and Volunteer. You can create your own opportunity types, see Create opportunities in Opportunity Marketplace. • **Description** • **Role display** • **Icon** • **Active** • **Updated**: The date the opportunity was last updated.
Role Application [sn_opp_market_position_application]	Tracks details of the application for a role by an applicant. • **Employee**: The name of the applicant. • **Role**: The position being applied for. • **State** • **Submission Message**: The message that an applicant created to submit with the application. • **Created**: The date the application was submitted.
Position Skill [sn_opp_market_opportunity_position_skill]	Tracks the skills that are associated with a role, such as • **Opportunity role** • **Skill** • **Skill level**
Application Quick Link [sn_opp_market_quick_link]	Tracks quick link details that are displayed on an application form, such as • **Application** • **Display order** • **Title** • **URL**

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Opportunity Marketplace tables (continued)

Table label [name]	Description
Shared Opportunity [sn_opp_market_shared_opp]	Tracks the details of opportunities that have been shared with an employee, such as • **Created**: The date the opportunity was created. • **Opportunity**: The number for an opportunity. An opportunity can be a job posting, an opportunity, or an opportunity role. • **Recipient**: The employee who the opportunity was shared with. • **Sender**: The employee who sent or shared the opportunity with another employee.

Hiring Core tables and roles

Hiring Core [sn_ta_hiring_core] is a dependent application that is installed when you install OPM.

Hiring Core provides a repository where you can store information that you've created or received from any third party talent acquisition platform for your hiring requirements.

The description contains examples of some of the available columns. Select the gear icon to see all the available columns (fields).

Hiring Core tables used by OPM

Table label [name]	Description
Applicant certification [sn_ta_hiring_core_applicant_certification]	Tracks data related to an applicant's certifications, such as • **Certificate name** • **Issuer name** • **Valid till** .
Applicant education [sn_ta_hiring_core_applicant_education]	Tracks an applicant's related educational data, such as • **Institute name** • **Field of study** • **Degree type** • **Location**
Applicant work experience [sn_ta_hiring_core_applicant_work_exp]	Tracks an applicant's work experience, such as

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Hiring Core tables used by OPM (continued)

Table label [name]	Description
	• **Company name** • **Start date** • **End date** • **Presently working here** (true or false) • **Location**
Candidate [sn_ta_hiring_core_job_applicant]	Tracks an applicant's basic information, such as name and email address.
Extracted Skill [sn_ta_hiring_core_extracted_skills]	Track's details about skills extracted from the Skills Foundation app, including • **Job applicant** • **Skill** • **Skill name**
Interview attendee [sn_ta_hiring_core_interview_attendee]	Track's details about interview participants and the interview process details. • **Name** • **Hiring role** • **Acceptance status** • **Job interview** • **Job title** • **Type**
Interview slot [sn_ta_hiring_core_interview_slot]	Tracks information about the **Job interview** and the interview start and end dates and time.
Job Application [sn_ta_hiring_core_job_application]	Tracks job applications and related records, such as • **Number**: the application number. • **Job requisition** • **Job applicant** • **State** • **Applied on**: the date an applicant applied for this job.
Job Board [sn_ta_hiring_core_job_board]	Tracks information about related job boards, such as

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Hiring Core tables used by OPM (continued)

Table label [name]	Description
	• **Name**: the name of the job board. • **Logo** • **Active**

Job Hiring Team [sn_ta_hiring_core_job_hiring_team]	Tracks information about your hiring team, such as
	• **Job requisition**
	• **Hiring role**
	  ○ **Hiring manager**
	  ○ **Interviewer**
	  ○ **Recruitment coordinator**
	• **Team Member**: The name of the interviewer.
	• **Type**: The designation of **Primary interviewer** or **Optional interviewer**.
	• **Visibility to applicant**: The flag that determines whether an applicant can see information about the hiring team (true = visible, false = not visible).

Job interview [sn_ta_hiring_core_job_interview]	Tracks key information related to an interview and the interview process, such as • **Number** • **Interview name** • **Interview type** • **State** • **Interview start** • **Interview end**
Job Posting [sn_ta_hiring_core_job_posting]	Tracks job posting details, such as • **Number**: The number used to track a job posting. • **Title** • **Job requisition**: the number of the job requisition associated with a job posting. A job requisition can have more than one associated job posting. • **Job board** • **Location flexibility**

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Hiring Core tables used by OPM (continued)

Table label [name]	Description
	• **State** • **Posting date**

Job Requisition [sn_ta_hiring_core_job_requisition]	Tracks your job requisition details, such as
	• **Employment type**
	  ○ **Full-time employee**
	  ○ **Part-time employee**
	  ○ **Temporary employee**
	  ○ **Contingent**
	  ○ **Contractor**
	• **Hiring manager**
	• **Job title**
	• **Number**: The number used to track the job requisition details.
	• **Number of headcounts**
	• **Primary location**
	
	Select the form personalization icon at the top of the form the select which fields are displayed in the form.

Profile link [sn_ta_hiring_core_profile_link]	• **Site** • **Job Applicant** • **Link** • **Type**
Recruitment Task [sn_ta_hiring_core_recruitment_task]	Tracks the tasks that are associated with a job requisition, such as • **Number**: the job requisition number • **Priority** • **State** • **Assigned to**: The name of the recruiter the task is assigned to. • **Short description**

Hiring Core roles

Role	Description
[sn_ta_hiring_core.admin]	Admin

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Hiring Core roles (continued)

Role	Description
[sn_ta_hiring_core.applicant]	Applicant
[sn_ta_hiring_core.external_applicant]	This role is for the external applicants and contains the applicant and the [snc_external] role.
[sn_ta_hiring_core.hiring_manager]	Hiring manager
[sn_ta_hiring_core.internal_applicant]	This role is for the internal applicants and contains the applicant and the [snc_internal] role.
[sn_ta_hiring_core.interviewer]	Interviewer
[sn_ta_hiring_core.recruiter]	Recruiter
[sn_ta_hiring_core.recruitment_coordinator]	Recruitment coordinator

Opportunity Type Configuration for Opportunity Marketplace

Opportunity Marketplace (OPM) supports different opportunity types that are designed for unique types of opportunities and roles.

Admins can create opportunity types. There are three opportunity types that automatically come with OPM. Admins can create other opportunity types.

Base application opportunity types

Opportunity type	Description
Gig	A Gig is an opportunity that consists of just a single role that can have one or many vacancies.
Project	A Project is an opportunity that is intended to enable sourcing a team that consist of multiple roles with one or many vacancies according to the role.
Volunteer	A Volunteer is an opportunity that consists of multiple roles with one or many vacancies according to role for volunteering-related activities.

Opportunity Type record fields

Field name	Description
Title	A title for the opportunity that is visible from the Opportunity Marketplace in the Employee Center.
Role display	Controls the number of roles that can be added to an opportunity.

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Opportunity Type record fields (continued)

Field name	Description
	• **Embedded within opportunity (1 position only)** • **Separate from opportunity (1 or more positions)**
Opportunity details	A list of available opportunity descriptions. The **Opportunity details** are visible in the opportunity. **Opportunity details** are stored in the Project opportunity creation details [sn_opp_market_opportunity] table. Opportunity details and Roles and requirements are record producer records in the Catalog Item [sc_cat_item] table. The record producer is a configuration of the layout for which fields are shown. There are 3 opportuntiy types included with the base system (Gigs, Project, and Volunteer). Clone one of the base opportunity types to create a custom **Opportunity type**.
Roles and requirements	A list of available opportunity roles and requirements. Opportunity Marketplace roles and requirements are stored in the Opportunity position [sn_opp_market_opportunity_position] table. Opportunity Marketplace roles are the job roles or positions for the opportunity.
Description	The text for the description of the opportunity that is displayed in Opportunity Marketplace the Employee Center.
Hiring approval flow	A list of available approval flows for managing the hiring process for an opportunity.
Active	Select to make the record active.
User criteria	Criteria to restrict access to the opportunity record. User criteria defined in the opportunity type determines who can create an opportunity type.
Icon	You can add an icon to opportunity types or view the icons for existing opportunity types.
Help link label	The text that is visible to users as the link for help. Add the label from the opportunity type page. The link appears at the bottom of the **Create an opportunity** page in the Employee Center.

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Opportunity Type record fields (continued)

Field name	Description
Help link URL	The URL that is associated with the **Help link label**.

Opportunity details and descriptions in Opportunity Marketplace

Admins can view detailed information about opportunities.

Here's a list of the columns displayed by the base system for opportunities. You can modify which columns to display and the order they're displayed by selecting the gear icon.

Opportunity details

Field	Description
Title	A name given to the opportunity by the opportunity owner.
Opportunity type	The base system opportunity type: • Gig • Project • Volunteer You can add custom opportunity types with names that are appropriate for your needs.
State	The **State** of the opportunity reflects the stage in the process where the opportunity is.
Owners	One or more owners of an opportunity can make updates and remove opportunities.
User criteria	User criteria gives access to groups of users for an opportunity.
Start date	The date the opportunity is published.
End date	The date the opportunity is closed.

You can update some of the fields. Double-click (or use the keyboard shortcut) to determine if it's editable.

Role Applicants for Opportunity Marketplace

Admins can view and update some of the opportunity applicant information.

Position Applications fields and descriptions

Field	Description
Employee	The name of the employee applying for the opportunity. It's linked to the applicant's **Employee Profile**.

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Position Applications fields and descriptions (continued)

Field	Description
Position	The name of the opportunity position. It references to the **Opportunity position** record.
State	The **State** value helps to track where in the process that the applicant is for the listed opportunity.
Submission message	A message provided by the applicant for the opportunity.

Form fields for creating opportunities in Opportunity Marketplace

Gigs, projects, and volunteer opportunities have 2 forms with several fields.

Form fields for creating an opportunity

Field	Description
Opportunity owner	You're listed as the owner of opportunities that you create. You can add additional co-owners from the list. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Opportunity title **Note:** The name for this field varies depending on the opportunity type.	An opportunity title is visible to users and it's used to help in the search for available opportunities. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Opportunity description **Note:** The name for this field varies depending on the opportunity type.	Include all relevant details for an opportunity. Add the details of opportunities to help potential applicants decide whether they want to apply for the opportunity. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Start date	The beginning date for the role. This field is in the **Opportunity** table[sn_opp_market_opportunity].
End date	The end date for the opportunity. This field is in the **Opportunity** table[sn_opp_market_opportunity].
Who can view this opportunity?	Select from the list to make the opportunity visible to a certain group of applicants. Leaving the field empty makes the opportunity visible to everyone.
Additional details	Add additional details that an applicant might want to learn about or want to understand.
Add attachments	Attachments can include related information such department details of the team an applicant would be working with or more extensive details about gigs, projects, or

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Form fields for creating an opportunity (continued)

Field	Description
	volunteer opportunities. Attachments are attached to the corresponding opportunity record.

Form fields for adding roles to your opportunities

Field	description
How many openings are available for this role?	The number of openings for this role.
What is the estimated time commitment for this role?	An estimate of the time you would be expected to commit to for this role.
Application deadline	The last day that applications are accepted for this role.
Role location • **In-person opportunity** • **Hybrid opportunity** • **Remote opportunity**	Where you would be expected to work from for this role.
Location	The physical office location for this role.
Required skills • **Actions** edit or delete. • **Skill**: List of available skills. • **Proficiency level**: Level of proficiency associated with the skill.	There are 3 controls for **Required skills**. The skill and proficiency level help to set expectations of the type of work expected for this role. The minimum skills that the opportunity owner believes are needed.
Add skills from a job title	Select a job title to add skills relevant to a certain job.
Preferred skills • **Actions** edit or delete • **Skill**: List of available skills. • **Proficiency level**: Level of proficiency associated with the skill.	There are 3 controls for **Preferred skills**. The skill and proficiency levels help to set expectations of the type of work expected for this role. Having preferred skills increases chances of being accepted for the role.
Employee level	There are 4 levels of individual contributors and 2 levels of management included with the OPM base system. The **Employee level** is included in the Skills Foundation job level table [sn_skills_int_job_level]. For more information about skills, job levels, and roles, see Configuring Skills Foundation.
Add attachments	Attachments provide more details about skills and roles for the opportunity.

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Talent Profile

Talent profile provides an aggregated view of internal and external talent types, enabling quicker hiring decisions by consolidating information on applicants, employees, contingent workers, and alumni in one place.

Get started

Explore  Learn about Talent profile	Configure  Install and configure the Talent profile application
Use  Learn how to use Talent profile	Reference  Important reference information about Talent profile

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Talent profile

Learn more about Talent profile and review the benefits it can provide in your organization's hiring process.

Talent profile overview

The Talent profile application provides a unified view of all talent types, including applicants, employees, contingent workers, and alumni, enabling faster and more informed hiring decisions. It improves talent visibility by creating talent profiles and pools, and allows for better sourcing, screening, and interview management decisions by tracking past interactions with the organization.

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Talent profile users

Users

User	Description
Recruiter	Recruiters create and manage talent profiles and pools to have a unified view of talent, track past interactions, and make informed sourcing, screening, and interview management decisions with hiring managers.

Talent profile benefits

Talent profile benefits

Benefit	Feature	Users
Create talent pools to organize similar talent profiles in one place for particular hiring requirements.	Create Talent pools	Recruiter
Use existing talent pools to associate suitable talent profiles from the pools to your talent pool.	Copy talent to pool	Recruiter
As an owner of the pool or one of the collaborators, remove the talent profiles that are no longer required.	Remove talent profiles from a pool	Recruiter
Delete a talent pool when it has served its purpose or is no longer relevant.	Delete a Talent pool	Recruiter
Create talent profiles to add it to the talent profile repository of your organization and use it for an optimized hiring process.	Create talent profiles	Recruiter
Use filter options to find relevant talent profiles more efficiently in the Talent pool tab.	Filter talent profiles	Recruiter
Add similar talent profiles to a talent pool to streamline communication to all the profiles during a particular hiring drive.	Add talent profiles to a Talent pool	Recruiter
Add and manage job prospects.	Job prospects	Recruiter

What to explore next

To learn more about configuring and using Talent profile, see:

- Configuring Talent profile
- Using Talent profile
- Talent Profile reference

Talent Profile

Talent Profile helps you get an aggregated view of different talent types at different touch points in the Hiring Experiences workflow.

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Talent Profile aids in quicker hiring decisions by providing an all-around view of your internal and external talent types like - applicant, employee, contingent, and alumni in one place.

Talent Profile also helps spot a particular talent by their previous interaction with the organization. It helps the recruiters distinguish between first-time applicants from the more experienced ones.

For each talent in the Talent Profile, you see:

- Personal information - Name and contact information.
- Work experience - Employment history, educational qualifications, certifications.
- History of interaction - Other applications from the talent and their outcomes.

Talent Profile benefits

Create a Talent Profile to leverage your existing talent profile repository that has different internal talent types - employee, alumni, contingent, and so on. Manage the internal profiles in an aggregated manner with your external candidate profiles. As new applications arrive those add up to the existing Talent Profile repository; constantly keeping it updated.

Talent Profile helps:

- Recruiters can select the talent from a talent repository consisting of first-timers and veterans who have a history of interaction with the organization.
- Hiring managers can target their interview questions based on the talent's available interaction history with the organization.
- Hiring team can identify the accurate fit quicker from the different types of talent available, whether internal or external.

Talent Profile pre-requisites

The following are the pre-requisites for using the talent profile functionality within the Hiring Experiences suite.

1. Set up Talent Definition
2. Opt in to Talent Profile

Talent pool

Talent pools help you group similar talent profiles in one place to identify the best profile for the job. It also helps to optimize communication and engagement with the targeted profiles simultaneously.

Talent pool overview

The collection of similar talent profiles results in a shorter time-to-hire, using existing connections and the explicit groupings of profiles.

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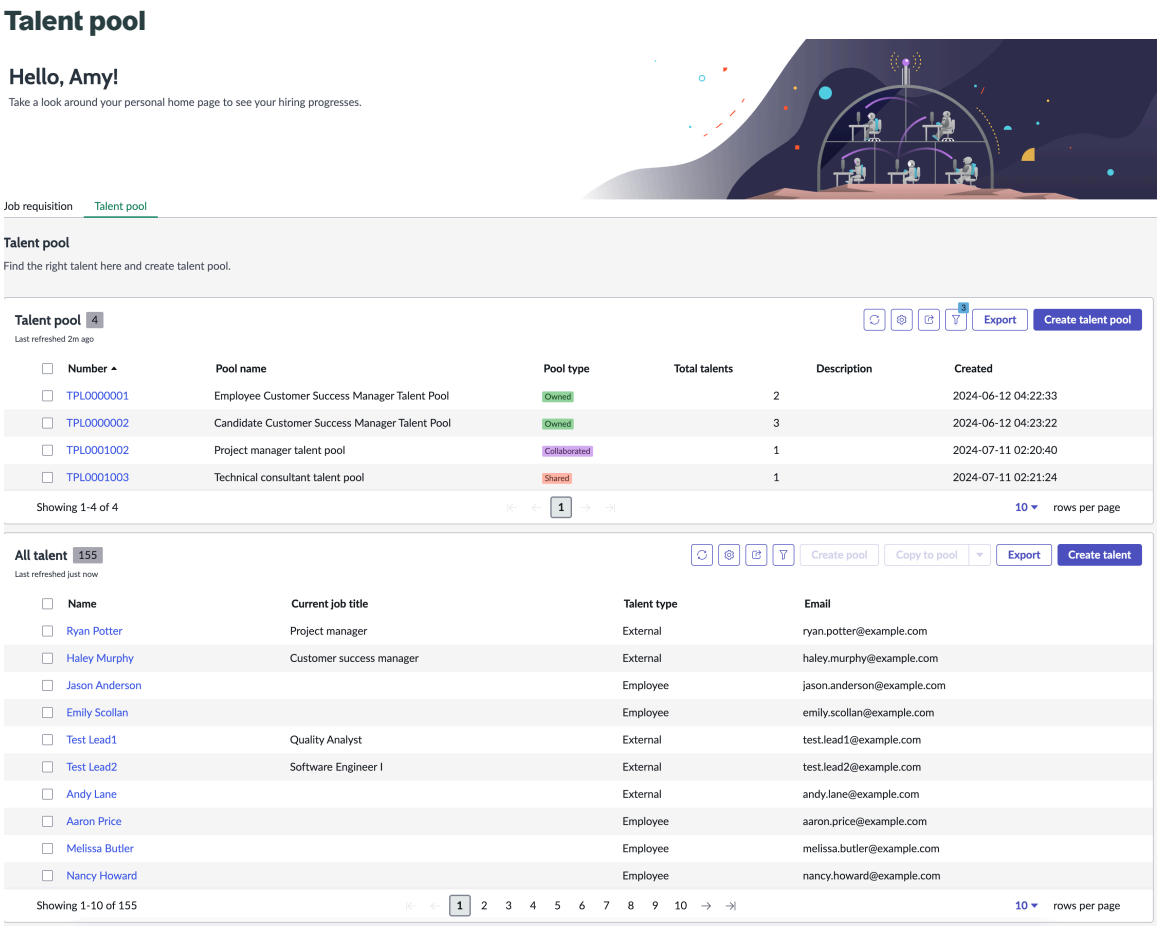

1. Talent pools can be associated with different job requisitions to create job prospects.

   Note: When a talent pool is associated with a job requisition, the talent profiles within that pool, are called job prospects.

2. Talent pools can be independent of any job requisition. It can only be a gathering of similar profiles as a means to better talent management and future hiring usage.

You can use Talent Pool after setting up the Talent Profile. For more information, see Configuring Talent profile.

Talent pool benefits

The talent pool enables recruiters to:

- Create and use talent pools, providing access to multiple recruiters at once, for increased hiring efficiency.
- Add talent profiles to relevant pools to keep similar profiles in one place.
- Send organized and optimized communication to the relevant pools when required.

The following table provides a quick view of what you can accomplish with the Talent pool.

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Talent pool functionality and benefits

Benefit	Feature	User
Create a Talent pool with similar talent profiles for pre-determined usage.	Create Talent pool	Recruiter
Share or collaborate on a talent pool with other recruiters for better visibility and transparency.	Manage Talent pool	Recruiter
Copy talent profiles from one Talent pool to another that provides ease of usage for multiple job openings.	Copy talent to another pool	Recruiter
Add talent profiles to specific job requisitions as prospects when there's a higher probability of a positive hiring outcome.	Add talent as job requisition prospects	Recruiter

Talent pool tab in Recruitment workspace

The **Talent pool** tab in the Recruitment workspace provides all the details of your talent pools and talent profiles.

The Hiring Experiences campaigns provide a **Campaign management** button. You can create targeted campaigns for both internal and external applicants using targeted strategies for your hiring requirements.

To create campaigns within the Hiring Experiences workspace:

- You must have the Content Experiences plugin (sn_ca) activated.
- You must have the sn_ca.campaign_manager or the sn_ca.campaign_approver role to view the campaigns.

For more information on creating targeted campaigns, see Creating campaigns.

The Talent pool section displays all the Talent pools that you can access that are segregated in three types - Owned, Collaborated, or shared.

You can filter the pools by their types, **Export** the details of the section as a downloadable file, or **Create talent pool** directly from the Talent pool section. For more information, see Create Talent pools.

Similar options are available for the All talent section where all the talent profiles in your organization are displayed. You can use the **Create talent** button to add a talent profile to the All talent list. For more information, see Create talent profiles.

Talent pool record view

View all the important specifications of a talent pool in the Talent pool record page.

Details tab

The **Details** tab shows you the basic details of the pool like the name, number, owner, collaborators.

As an owner, you can view or edit the details. As a collaborator or if it has been shared with you, you get a read-only view of the details. For more information on notifications for collaborated or shared pools, see Email notification for Talent pools.

You must have the sn_ta_tp_talent_profile.user role to own, share, or collaborate on a Talent pool.

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Talent tab

The **Talent** tab lists all the talent profiles added to the pool. You can perform the following actions within the **Talent** tab.

- Add talent profiles to a Talent pool.
- Create talent profiles.
- Copy talent to pool.
- Copy talent profiles as job prospects.
- Remove talent profiles from a pool.
- Delete a Talent pool.

Record History tab

The **Record History** tab shows you the recorded history of the talent pool with timestamps.

The tab is only visible to the admin. It doesn't show up for the recruiters.

Configuring Talent profile

Install and configure the Talent profile application to get an aggregated view of different talent types at different point in the hiring journey.

Install Talent profile

You can install the Talent profile application (sn_ta_tp) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the Talent profile application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Talent profile:

- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Talent Profile.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Talent profile application (sn_ta_tp) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

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A list of the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Set up Talent Definition

Create a talent profile definition to opt in to Talent Profile.

Before you begin
Role required: sn_ta_hiring_core.admin/ sn_ta_tp.talent_profile_admin

Procedure

1. Navigate to **All** > **Talent Acquisition** > **Talent Profile** > **Talent Definition**.
2. Select **New**.
3. On the Talent profile definition form, fill in the fields.
   For a description of the field values, see Talent profile definition form.
4. Select **Submit**.

Result
You have a new Talent Definition.

What to do next
Opt in to the Talent Profile.

Note: You can see the default talent types when you change the **Status** of the default Restricted caller access (RCA)s from **Requested** to **Allowed** available in the application **Source Scope Talent Profile**.

Opt in to Talent Profile

Opt in to the Talent Profile to access all the talent records, create talent pools, and add prospects to the job requisitions.

Before you begin
Role required: sn_ta_tp.talent_profile_admin

1. Create a Talent Definition to opt in to Talent Profile.
2. Verify you're in the Talent Profile application scope before opting in to or out of the Talent Profile.

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Procedure

1. Navigate to **All** > **Talent Profile** > **Setup**.
2. In the Want to opt in to talent profile page, Check the box **Yes, opt in to talent profiles** and select **Opt in**.

Result
You have opted in to the Talent Profile.

Generate talent profiles

Generate the talent profile creation after you opt in.

Before you begin
Role required: sn_ta_hiring_core.admin/ sn_ta_tp.talent_profile_admin

Procedure

1. Navigate to **All** > **Talent Definition**.
2. Select **Generate Talent Profiles**.

Result
You've created the talent profiles.

Create a talent type

Create an implementation in the talent profile scripted extension point to add a new talent type.

Before you begin
Role required: sn_ta_hiring_core.admin/ sn_ta_tp.talent_profile_admin

About this task
The Talent profile extension point has four default implementations that pull in data of different talent types to the talent profiles. You can use the default settings available or create implementations, depending on your organizational requirements.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_ta_tp.TalentProfileExtPoint` extension point and select to open it.

Note: The extension point must be opened within the Talent profile application scope.

You have four default implementations.

Talent profile implementations

Extension point	Extension class	Description
`sn_ta_tp.TalentProfileExtPoint`	TalentProfileExtPointDefault	Extension point for default or unspecified talent profiles.
`sn_ta_tp.TalentProfileExtPoint`	TalentProfileExtPointAlumni	Extension point for the

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Extension point	Extension class	Description
		talent type, alumni.
`sn_ta_tp.TalentProfileExtPoint`	TalentProfileExtPointEmployee	Extension point for the talent type, employee.
`sn_ta_tp.TalentProfileExtPoint`	TalentProfileExtPointCandidate	Extension point for the talent type, external candidate.

3. Select the **Create implementation** related link to create an implementation.
4. On the Create implementation form, fill in the fields.
   For a description of the field values, see Create implementation form.

Result

You've created an implementation for the `sn_ta_tp.TalentProfileExtPoint` extension point. Use it to have a customized talent type.

Talent Profile management

Talent Profile management activities help keep data set up to date and clutter-free.

For more information, see:

- Modify purge policies to clean up data.
- Rules to archive data.
- Cascade rules for cleaning data.

Set up a scheduled job for talent profile generation

Customize the frequency of the scheduled job to get an uninterrupted flow of new talent profiles.

Before you begin

Role required: sn_ta_hiring_core.admin/ sn_ta_tp.talent_profile_admin

About this task

The *Generate Talent Profiles* scheduled job is run daily by default, once you have created a Talent Definition. Update the execution frequency of the scheduled job or run it manually to add more talent profiles.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs** > **Generate Talent Profiles**.
2. **Optional:** Change the value of the **Run** field to your preferred option from the default option **Daily**.
   The available options are:
   - **Daily**
   - **Weekly**
   - **Monthly**
   - **Periodically**

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- **Once**
- **On Demand**
- **Business Calendar: Entry Start**
- **Business Calendar: Entry End**

a. Save your changes by either saving or updating the scheduled job.

- To save your changes and stay on the page, select and hold (or right-click) to select **Save**.
- To save your changes and leave the page, select **Update**.

3. **Optional:** Select **Execute Now**.

Using Talent profile

Use the Talent profile application to create and manage talent profiles and pools. Get a unified view of all talent types, including applicants, employees, contingent workers, and alumni, enabling faster and more informed hiring decisions.

Create Talent pools

Create Talent pools to organize similar talent profiles in one place for particular hiring requirements.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Create a talent pool from either the Talent pool section or the All talent section in the **Talent pool** tab.
   - To create a talent pool from the Talent pool section in the **Talent pool** tab, select **Create talent pool**.
   - To create a talent pool from the All talent section, select the required profiles and select **Create pool**.
3. On the Create New Talent pool form, fill in the fields.
   For a description of the field values, see Talent pool form.
4. Select **Save**.

Result

You have created a talent pool. Collaborate with other recruiters after creating the pool or simply share the pool with people involved in the hiring process for visibility.

Copy talent to pool

Use existing talent pools to associate suitable talent profiles from the pools to your talent pool.

Before you begin

Role required: sn_ta_hiring_core.recruiter

About this task

Copy the suitable talent profiles to associate them to your pool from another talent pool. You can also directly associate the talent profiles to your pool.

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Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.

Selection	Action
Copy talent from one pool to another pool	Copy talent from one pool to the other from the **Talent pool** tab. Go to the talent pool and in the **Talent** tab, se lect the profiles to view the **Copy to another pool** button and select it.
Copy talent profile to a pool	Copy talent from the All talent section to a tal ent pool. Go to the All talent section, select the profiles to copy to see and select the **Copy to pool** button.

3. In the Copy to another pool pop-up window, search for or select the Talent pool you want to copy to, from the Select talent pool drop-down list.

   Note: You see a pool in the drop-down list only if you're the owner of the pool or one of the collaborators.

4. Select **Done** to finish.

Result
You have associated the required talent profiles from one Talent pool to another.

Remove talent profiles from a pool

Remove the talent profiles that are no longer required within a pool.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.
3. In the Talent pool section, select the required Talent pool.
4. Select the talent profile or profiles to activate the **Remove** button provided as a secondary button adjacent to the **Copy to another pool** button.
5. In the Remove talent pop-up window, select **Remove** to confirm removing the selected talent profiles.

Result
You have removed the selected talent profiles from the pool.

Note: You can only remove a talent profile from a pool if you're the owner of the pool or one of the collaborators.

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Delete a Talent pool

Delete a Talent pool when it has served its purpose or it's no longer relevant.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure
1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.
3. In the Talent pool section, select the Talent pool you want to delete.
4. Select the ellipses on the Talent pool record page and select **Delete**.
5. In the Delete talent pool pop-up window, select **OK** to confirm deleting the pool.

Note: The delete functionality is available only for the owner of the Talent pool.

Result
You have deleted the selected Talent pool.

Create talent profiles

Create talent profiles to add it to the talent profile repository of your organization. Use it for an optimized hiring process.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure
1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.
3. Create a talent profile either from the All talent section or from the **Talent** tab in a Talent pool page.

Selection	Action
Create talent in the All talent section	A new talent profile is added within the talent repository of the organization.
Create talent within a Talent pool	A new talent profile is added within the talent repository of the organization and the Talent pool that it's created within.

4. On the Create New Candidate form, fill in the fields.
   For a description of the field values, see Create talent form.
5. Select **Save**.

Result
You have created a talent profile.

Filter talent profiles

Use filter options to find relevant talent profiles quickly in the Talent pool tab.

Before you begin
Role required: sn_ta_hiring_core.recruiter

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Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.
3. Select the filter icon  and select **Advanced view**.
4. You can either filter the talent profiles by the applicant option or by user title option.
   - To filter by job applicants select **Job Applicant** and set the condition.
   - To filter by job title select **User** > **Title** and set the condition.
5. Select **Update** to set the filter conditions.

Add talent profiles to a Talent pool

Add similar talent profiles to a Talent pool to streamline communication to all the profiles during a particular hiring drive.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.
3. In the Talent pool section, select the required pool where you want to add more talent profiles.
4. In the Talent pool page, go to the **Talent** tab.
5. Select **Add talent** to view the pop-up window with the list of talent profiles.

   Note: The button is only visible to the owner or the collaborator of the talent pool.

6. Add talent profiles from either choosing All talent or a particular pool.
   - To choose from all talent profiles, select **All talent** from the drop-down on the pop-up window.
   - To choose from a particular pool, select your chosen pool from the drop-down on the pop-up window.

   Note: You see a pool in the drop-down list only if you're the owner of the pool, one of the collaborators, or the pool is shared with you.

7. Select the talent profiles that you want to add to the current pool and select **Save**.

Job prospects

Job prospects provide a direct view into the most relevant profiles added to a particular job requisition.

Add talent profiles as job prospects to a job requisition when the profiles are the most relevant fit for the job opening. The profiles are known as prospects when added to a job requisition.

It provides better visibility to the recruiters into the profiles that are the prospective fit for the job opening.

Copy talent profiles as job prospects

Copy talent profiles from a Talent pool to a particular job requisition as prospects.

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Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
   - To copy talent profiles to job prospects from a talent pool, go to the **Talent pool** tab, select the pool and select the talent profiles within to see the **Copy to prospects** button adjacent to the **Copy to another pool** button.
   - To copy talent profiles to prospects from the All talent section, select the talent profiles and select **Copy to prospects** adjacent to the **Copy to pool** button.
2. In the Copy talent to job prospects pop-up window, select a job requisition from the Select job requisition drop-down list, and select **Add**.

   Note: You can only copy the talent profiles as prospects to a job requisition that is assigned to you, as a recruiter.

Result
You have added the selected talent profiles as job prospect.

Create prospects in job requisitions

Create a prospect within a job requisition as a potential fit for the job opening.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Job requisition** tab.
3. Select the required job requisition.
4. Go to the **Prospects** tab in the job requisition record page.
5. Select the **Create a prospect** button under **Add prospects**.
6. On the Create New Candidate form, fill in the fields.
   For a description of the field values, see Create talent form.
7. Select **Save**.

Result
You have created a prospect within a job requisition.

Add prospects to job requisitions

Add relevant profiles directly to the job requisition as job prospects.

Before you begin
Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Job requisition** tab.
3. Select the required job requisition.

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4. Go to the **Prospects** tab of the job requisition record page.
5. Select **Add prospects** to view the talent profiles and talent pool, you've access to, listed in the Add prospects pop-up window.
6. You can either choose talent profiles or choose profiles from a talent pool.
   - To add talent profiles directly, select the required profiles from the Select talent from list.
   - To add profiles from a talent pool, select the pool from the Select talent from list.

   Note: You see a pool in the drop-down list only if you're the owner of the pool, one of the collaborators, or the pool is shared with you.
7. Select **Add** to finish adding the talent profiles as job prospects.

Edit prospects in job requisition

Edit newly created prospect profiles within a job requisition until the prospect applies.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Job requisition** tab.
3. Select the required job requisition.
4. On the **Prospects** tab, select the talent profile to be edited.
   You can also select the talent profile from the All Talent section in the **Talent pool** tab on Recruitment workspace.
5. Select **Edit candidate**.
   You can only edit a candidate profile until they've applied to the job requisition.
6. Update the details, as required.
   For a description of the field values, see Create talent form.
7. Select **Save**.

Send an email from a talent profile

As a recruiter, send an email to different talent types providing personalized details.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab.
3. In the All talent section, select the required talent profile.
4. Go to the **Details** tab in the talent profile record page.
5. In the Compose section, write an email to the recipient and select **Send email**.

Result

The email is sent to the talent profile and the record is visible in the Activity stream.

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Send an email from a talent pool

As a recruiter, send an email to a talent pool providing personalized details.

Before you begin

Role required: sn_ta_hiring_core.recruiter

Procedure

1. Navigate to **Workspaces** > **Recruitment workspace**.
2. Go to the **Talent pool** tab and select a pool from the Talent pool section.
3. In the **Details** tab, go to the Compose section.
4. Write the email and select **Send email**.

Result

You have sent an email to all the talent profiles within your talent pool.

Email notification for Talent pools

Notification emails are sent to the recruiters who have Talent pools shared or collaborated with by the owner.

Receive a notification when you're added as a collaborator in a Talent pool by the pool owner.

Receive a notification when a Talent pool is shared with you to view the details by the owner.

Targeted communications in Hiring Experiences

Email communications and other targeted communications like campaigns provide efficient means of conveying important messages to different stakeholders.

- Create campaigns as the means of targeted engagement for both the internal and external applicants. For more information, see Creating campaigns.
- Send personalized email communications to all your internal or external talent types from different access points within the Recruitment workspace. For more information, see:
  - Send an email from a job requisition
  - Send an email from a talent profile
  - Send an email from a talent pool

Talent Profile reference

Reference topics provide additional information about the forms, properties, and components in Talent profile.

Create implementation form

The following fields are available in the new implementation record for an extension point.

Implementation record view

Field	Description
Name	Unique name for the extension point implementation.
API Name	Name of the extension point API that is pre-pended with the application scope. This is a system-assigned name and can't be changed.

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Implementation record view (continued)

Field	Description
Glide AJAX enabled	Options to make the scripted extension point available to client scripts, list/report filters, reference qualifiers, or, if specified, as part of the URL.
Mobile callable	Option to make the scripted extension point available on the mobile device.
Sandbox enabled	Option to let a client make changes to their extension points without causing global affecting.
Application	Scope of the extension point within which it works.
Accessible from	Application that can access this scripted extension point.
Active	Option to enable the scripted extension point implementation.
Description	Details of the extension point.
Script	The server-side script to run when called from other scripts. The script must define a single JavaScript class or a global function. The class or function name must match the Name field.
Protection policy	Protection policy for script includes published as part of a custom application.

Create talent form

A new candidate profile is added by filling the following details in the form.

Create new candidate form

Field	Description
First name	Given name of the candidate.
Last name	Family name of the candidate.
Phone number	Contact number of the candidate.
Current job title	Existing job title of the prospective candidate.
Candidate type	Type of candidate. There are two candidate types available. • Prospect • Applicant
Consent status	Auto-generated consent status of the candidate. The consent status is changed when a change is requested from the candidate.
Email	Registered email address of the candidate.
Location	Location where the candidate is based or plans to join the company.

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Create new candidate form (continued)

Field	Description
Current employer	Existing employer of the prospective candidate.
Attachment	Section to attach relevant documents or use or create different templates.

Components installed with Talent Profile

Several types of components are installed with activation of the Talent Profile plugin, including tables, user roles, and scheduled jobs.

Roles installed

Role title [name]	Description	Contains roles
Talent Profile admin [sn_ta_tp.talent_profile_admin]	This role is required to set up Talent Profile.	Talent Profile user [sn_ta_tp.talent_profile_user]
Talent Profile user [sn_ta_tp.talent_profile_user]	This role is required to use the Talent Profile functionalities.	None

Scheduled jobs installed

Scheduled job	Description
Generate Talent Profiles	Determines the inflow of new talent profiles during regulated intervals.

Tables installed

Table	Description
Job leads [sn_ta_tp_job_req_m2m_talent_profile]	Details of the job leads in the system.
Talent pool [sn_ta_tp_talent_pool]	Details of the talent pools in the system.
Talent pool to Talent profile m2m [sn_ta_tp_talent_pool_m2m_talent_profile]	Record of the interactions between the talent pools and the talent profiles.
Talent profile [sn_ta_tp_talent_profile]	Details of the talent profiles in the system.

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Table	Description
Talent profile definition [sn_ta_tp_talent_profile_definition]	Details of the talent profile definition created for your organization.

Properties installed with Talent Profile

The system properties installed with the Talent Profile plugin are required to configure different functionalities in the Talent Profile environment.

These properties are available for Talent Profile.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Talent Profile

Property	Description
glide.ui.sn_ta_tp_talent_pool_activity.fields	Talent pool activity formatting fields. • Type: String • Default value: *Attachments*, *EmailCorrespondence*, *EmailAutogenerated*, number, pool_name, owner, purpose, collaborate_with, share_with, description, comments
glide.ui.sn_ta_tp_talent_profile_activity.fields	Talent profile activity formatter fields. • Type: String • Default value: *EmailCorrespondence*, *EmailAutogenerated*, *Attachments*

sn_ta_tp.breached_time.no_of_days	Number of days a talent pool can be inactive before it's purged.
	• Type: Integer
	• Default value: 2556
	• Other possible values:
	  ○ Ignore cache: Selected
	  ○ Read roles: admin, sn_ta_tp.talent_profile_admin
	  ○ Write roles: admin, sn_ta_tp.talent_profile_admin

sn_ta_tp.min_admin_count	Minimum number of active talent profile admin users. • Type: String • Default value: 1 • Other possible values:

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Properties for Talent Profile (continued)

Property	Description
	○ Ignore cache: Selected ○ Read roles: sn_ta_tp.talent_profile_admin ○ Write roles: sn_ta_tp.talent_profile_admin
sn_ta_tp.talent_profile_enabled	Option to opt in and out of the Talent Profile. • Type: true | false • Default value: true • Other possible values: ○ Ignore cache: Selected ○ Write roles: sn_ta_tp.talent_profile_admin
sn_ta_tp.talent_profile_last_run_at	Update frequency of the list of Talent Profiles. • Type: String • Default value: YYYY-MM-DD 00:00:01 • Other possible values: ○ Ignore cache: Selected ○ Private: Selected ○ Write roles: sn_ta_tp.talent_profile_admin

Talent pool form

The field descriptions provided are required to create a talent pool.

Create new talent pool form

Field	Description
Number	Auto-generated number of the new talent pool.
Purpose	Short description of the purpose behind creating the talent pool.
Owner	Name of the owner of the talent pool.
Pool name	Name of the talent pool.
Collaborated with	Persons chosen to be collaborators in the talent pool.
Share with	Persons the talent pool is shared with.
Description	Detailed description of the requirement of the talent pool.
Attachments	Section to attach relevant documents or use or create different templates.

Talent profile definition form

The following table provides the field and its corresponding description. The fields are required to create a talent profile definition.

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Talent definition record

Field	Description
Name	Name of the talent profile definition.
Talent type	Types of talent profiles. There are four types available by default. • External • Employee • Alumni • Contingent For more information on creating a talent type, see Create a talent type.
Table	Table record from where the talent data is gathered. This field is automatically set depending on the choice of the **Talent type**.
Active	Option to enable the definition record.
Order	Order of preference for the definition.
Filter condition	Filter conditions to be met to be added to the definition.

Growth Experiences

The ServiceNow® Growth Experiences applications use a suite of products to help employees develop, grow and deliver on critical business outcomes.

Growth Experiences Applications

Talent Development Core	Skills Intelligence	Career Conversations
		
Delivers an end-to-end process for individuals and managers to take control of their career growth and development plans	An AI-driven platform that you can use in your organization to develop a workforce that is based on skills	Supports an end-to-end process for individuals and managers to create and manage career growth conversations

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Learning  Enables employees to discover and engage with career development content	Mentoring  Connects individuals seeking mentorship with experienced mentors	Employee Goals  Enables employees to view and track their career goals from the Employee Center, ensuring they are aligned with your company's strategic objectives
Talent Feedback  Allows managers to request feedback on employee skills from the employee's collaborators		

Related applications

Here is a list of some of the related applications. Select a link to learn more about these applications.

- Leader Hub
- Manager Hub

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Talent Development Core

ServiceNow® Talent Development Core supports an end-to-end process for individuals and managers to take control of their career growth and development plans.

Helps employees identify growth and development areas, create a plan, and track the success of the plan.

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Exploring  Learn how the Talent app supports managers and employees identify, create, and complete career growth plans.	Installing and configuring  Administrators install and configure the Talent app and related features.	Administer  Administrators maintain the Talent app and related features over time as the organization grows and evolves.
Using  From the ServiceNow® Employee Center, managers and employees work with the Talent app and related features on career growth and development.	**Integration**  Integrate with different applications to expand the capabilities and effectiveness of the Talent app.	**Reference**  Reference information provides important details related to how the Talent Development Core app works.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Talent Development Core

The Talent Development Core application provides employees and managers with an intuitive and streamlined process for managing career growth and development.

When you open Career hub from the Employee Center, you see a summary of your career growth plan that includes only your information.

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Career hub overview

The Career hub tab provides a summary view of your growth and development plans.

Career hub is a simplified and intuitive way to start building your development plans. Use Career hub to do the following:

- Get an overview of where you are with your growth and development and where you're going.
- Create aspirations that motivate you, inspire you, and point you in the right direction.
- View and complete career plan suggestions that are tailored to your development plan.
- View your assigned career growth tasks such as trainings, connections with your peers, and meetings with your manager.
- Navigate ongoing aspirations and find inspiration by motivating, inspiring, and pointing you in the right direction.
- View your profile and provide employment and personal details. View details such as your manager, coworkers, personal contacts, and update your Career hub skills.
- View your growth plan tasks and stay on track by completing tasks that might need your attention.
- View courses in Learning to complete your training to help you grow and show off all your learning achievements.
- View your current learning development and keep up with your assigned, saved, and ongoing courses.
- Connect with coworkers and managers and view your scheduled conversations.
- View your recent conversations and manage your talking points and follow-up items.
- Grow your network for career support by making new connections.

Note: You can also add people to your circle, which highlights the people that might help motivate and inspire you in your career journey. Simply select **Add people to your circle** to add people, search the directory, and add mentors, peers, and people who help push you to grow.

Career hub widgets overview

Widget	Description
Create an aspiration	Get motivated, inspired, and pointed in the right direction.
Grow with intent	Shows you actionable items or suggestions that are specific to you.
Career growth tasks	Shows you all your tasks such as assigned courses and trainings that help manage your career growth.
See the impact that you've made	A time-line that reflects your milestones. You can use a filter to control whether the time-line displays the following milestones: • Aspirations (in-progress or complete) • Growth plans (in-progress or complete) • Learning (in-progress or complete)

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Career hub widgets overview (continued)

Widget	Description
	• Skills gained • Role updates
Aspirations	Shows you specific skills and roles that help you with ongoing aspirations and with finding new aspirations.
Your skill range	Gets you started with uploading a resume and adding skills to your profile.
Growth plan tasks	Helps you stay on track by completing tasks that are upcoming, overdue, and due soon.
Opportunities	Provides you with a recommendation of internal job opportunities. The job opportunities in this widget are mapped to the job opportunities in the following widgets that appear in the Opportunity marketplace module: • Opportunities that might interest you • Based on your skills
Application status	Helps you keep track of internal jobs for which you applied. It provides you with the current status of your job application.
Latest achievement	Shows you all your earned achievements based on your learning progress. **Note:** since achievements do expire, you can only see achievements that aren't expired.
Current learning	How you keep up with your assigned, saved, and ongoing courses and trainings.
Upcoming conversations	Shows you all your scheduled and upcoming conversations by week.
Recent conversations	Helps you manage all your talking points and follow-up conversation items.
Make new connections	Lets you search the org chart to browse peers with whom you can make connections.

Aspirations overview

Create and set your aspirations to help inspire and guide you on your career growth and development journey.

Create and track personal and professional aspirations.

Aspiration Types

A general category used to help focus your aspiration.

Interest

Interest gives you an opportunity to contribute to a given area of interest. You can set an aspiration for any topics you want to explore.

Skill

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Skill gives you the opportunity to become a specialist in something you're already good at, or to tackle something new.

Role

Role gives you the opportunity to earn a new title in your current trajectory, or to try something in a different field.

General

If your aspiration falls outside the interest, skill and role categories, general gives you the opportunity to make something from scratch.

Growth plans overview

Build your growth plan to organize and track your career goals.

Growth plans are a simplified and intuitive way to build growth plans that give your career goals guidance and structure and are used to do the following:

- Create a growth plan.
- View tasks connected to your growth plan such as trainings or connections with peers or managers.
- View growth plan items and their state, progress, and status updates.
- View growth plan details such as due dates and plan activities, plan status, and edit your plan details.
- View and add additional plan activities.
- Learn more about how growth plans can help you develop and discover new opportunities.

Note: Create a growth plan based on your aspirations and conversations or you can build a growth plan from scratch based off criteria selected during the creation of your growth plan.

Growth plans are tailored to your individual needs and aspirations to help provide a roadmap to your career goals. With support from your peers and manager, you can achieve new heights in your career.

Growth plan home

Features overview

Feature	Description
Create a growth plan (based on aspirations and conversations)	A growth plan is initially created based on your aspirations or conversations. Growth plans can be shared with your manager to make career growth clear, achievable, and rewarding.
Build a growth plan (from scratch)	Takes you through the steps to build a new growth plan based on review activities or trending learning courses. 1:1 Check-in with your manager is Required.
Growth plan details page	Shows you the overall growth plan details where you can view details about your plan, and axes before you fillyour plan activities.

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Features overview (continued)

Feature	Description
	You can discard, share, launch and set a growth plan due date and view your plan activities and add activities such as learning, check-in, mentorship, or something else.
Your next tasks	Shows you activities that help you stay on track by completing some tasks that need your attention. You can start any activity listed in this section. The status of a plan item might be listed as any one of the following (upcoming, required, overdue, due soon, and up next).
Your growth plans	Shows you plan details such as plan name, state, progress, and the last updated date. You can sort and search plans.
Past growth plans	Shows you plan details such as plan status (all, completed, canceled), name, state, and date completed.

Here are some examples of development opportunities offered with growth plans:

- Job shadowing or mentorship programs
- Coaching or career counseling services
- Professional development programs or certifications
- Leadership development programs or courses
- Team building and collaboration exercises
- Conferences, seminars, or networking events
- Tuition reimbursement or other educational benefits

Note: connect with your manager or HR representative to find out what development opportunities are available to you, to help create a development plan that aligns with your career goals and the priorities of the organization.

Conversations overview

Conversations with managers, peers, and mentors are a critical part of your career growth. Identify and manage the important conversations you have.

You must have the Career Conversations app installed for Conversations to work.

Related topics

Career Conversations

Install Career Conversations

Create a growth conversation in Career Conversations

Update a growth conversation in Career Conversations

Learning overview

Identify, manage, and complete all your learning goals from the Learning tab in Talent Development.

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Learning helps you grow in all aspects of your career with courses and trainings specific to your career development plans and is used to do the following:

- View course and training reminders that help you stay on track and complete your assigned learnings and pick up where you left off.
- View learning tasks, your current learning challenges, and your latest achievements to view your development progress and success.
- View recent learning activity such as assigned learnings, saved learnings, learnings that you've shared, and learning history.

Note: Learning also lets you set challenges to help prioritize your career growth. You decide what courses you want to take and when you want to complete them. You can also set the frequency of completion, when you want to start, and track how many courses you want to complete in a given period.

Learnings are tailored to your course and training aspirations. Learning lets you view your learning progress and achievements.

Learning widgets overview

Widget	Description
Finish these learnings before they're due	Shows your overdue courses and trainings so that you can plan to complete them before they're due.
Learning tasks	Shows your learning tasks that are in progress and assigned and displays the progress in the last 30 days.
Your current challenge	Shows you the challenges that you've started, the amount of days left before the challenges start, and also lets you discover new things to learn.
Latest achievement	Latest achievement shows you all your earned achievements based on your learning progress.
Continue where you left off	Shows you the courses or trainings that you started but never finished, and gives you the chance to continue where you left off.
Recent activity	Shows your assigned, saved, shared courses and trainings, and also shows your learning history.
Trending now	Shows you courses, paths, or collections that are trending now so that you can discover new things to learn.
Track your learning	Shows your assigned, saved, shared with, history, challenges, and completed courses.
Achievements	Shows your Learning achievements. When you learn something new and complete a course, you can earn achievements and see them on the Learning tab.

Opportunity Marketplace overview

The Opportunity Marketplace is a single, unified space where individuals and organizations can share opportunities that are discoverable by employees.

Opportunities in the marketplace include internal jobs that are relevant to employee aspirations, which help with career exploration, growth, and internal mobility.

Use the following marketplace features to help you grow in your career journey:

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- Search for available opportunities within the organization.
- View opportunities that might interest you based on roles that fit with your skills, experience, and aspirations.
- View opportunities that have been shared with you and share opportunities with other coworkers.
- View opportunities that are featured by the organization.
- View testimonials from your coworkers that highlight their success.
- View recommended opportunities based on your current role, aspirations, and top skills.

Note: When searching for opportunities of interest, you can update your preferences to your working style, job level, and job location. You can also view your favorite jobs, share opportunities, and create aspirations.

The Opportunity Marketplace app helps you find the next steps in your career journey.

Features overview

Feature	Description
Search available opportunities	Use the search field to populate a list of potential jobs based on job title, location, or description. **Tip:** The Opportunity Marketplace app supports the following search engines: • AI search • Zing search
Internal job (opportunities list)	An internal job listing shows the job title, job location, match analysis, quick view, favorite option, create an aspiration, and share this opportunity option. **Note:** You can also filter and sort the job list.
Match analysis (Job)	Shows how your skills match with a specific opportunity by displaying the skills requirements, skills needed, and preferences such as working style and location.
Quick view (Job)	Shows the job location, description, and applicant criteria details.
Create an aspiration	Optional feature that lets you create an aspiration for a specific job. You can choose an aspiration name, add a description, and save the draft aspiration.
Share this opportunity	Optional feature that enables you to share an opportunity with another coworker. You can choose who to share it with, add a personal note, and share opportunity.
Opportunities that might interest you	Shows specific opportunities that might interest you based on your profile details, current role, and skills.

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Features overview (continued)

Feature	Description
Opportunities shared with you	Shows opportunities that have been shared with you by coworkers within the organization. **Note:** You can review these opportunities, favorite them, create an aspiration, and share it with other coworkers.
Featured by your company	Shows opportunities that your company has highlighted as a potential interest.
Testimonials from your coworkers	Shows testimonials or comments from your coworkers.

Internal Jobs

Feature	Description
Internal job (Based on your current role)	Shows recommendations based on your current role. Internal job listings show the job title, job location, match analysis, quick view, favorite option, create an aspiration, and share this opportunity option. **Note:** You can also filter and sort the job list.
Internal job (Based on your aspirations)	Shows recommendations based on your aspirations. Internal job listings show the job title, job location, match analysis, quick view, favorite option, create an aspiration, and share this opportunity option. **Note:** You can also filter and sort the job list and view aspirations.
Internal job (Based on your skills)	Shows recommendations based on your top skills. Internal job listings show the job title, job location, match analysis, quick view, favorite option (heart button), create an aspiration, and share this opportunity option. **Note:** You can also filter and sort the job list and view a profile.

Note: While mobile capabilities are supported for the Vancouver and Australia release, mobile capability is not supported in the Utah release.

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Hiring Core

Hiring Core provides a repository to store information for your hiring requirements. Activate the Hiring Core plugin (app-hiring-core) to start using it. For more information on the hiring core tables, see Components installed with Talent Development Core.

AI search

Artificial intelligence (AI) embedded into a search engine helps you find what you're looking for through an intelligent, AI-powered search. AI search is an assistive technology tool that promotes accessibility through its search features. In contrast with Zing search, the search engine used in previous releases, AI search is more interactive, helpful, and faster at finding the answers you need. Employees and opportunity owners can find answers quick and conveniently with features like auto-complete search queries, natural language support, and typo handling.

When AI search is enabled via the ServiceNow® AI Search application, the Opportunity Marketplace app is able to leverage AI search and use its intelligent query features for all searches in the marketplace. With AI search enabled, the portal search engine captures information about the employee—such as their role, location, department, assets, and search history—and returns search results that are relevant and personalized. AI search also yields genius results that enable employees to interact directly with the search results that display the best answer for the search query.

Employees and opportunity owners experience the benefit of generating more sophisticated search results when they use the following search fields to explore opportunities in the marketplace:

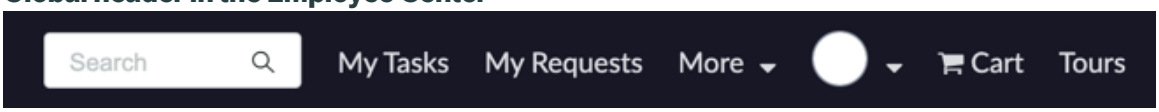
Opportunity Marketplace

- The search field in the Welcome to the Opportunity Marketplace widget. This widget appears when you access the home page for the Opportunity Marketplace.
- The search field in the Search available opportunities widget. This widget appears when you access the Internal jobs page.

Employee Center

The search bar that appears on the global header in the Employee Center portal. The global header is the first row in the Employee Center portal. This search bar is accessible from any page in the portal excluding the home page.

Global header in the Employee Center



For more information on AI search and Zing search features, refer to the following topics to help your organization determine which search engine to implement and use:

- Exploring AI Search
- Features of Zing text indexing and search engine

For more information on AI search and how to enable it, refer to AI Search.

Installing and configuring the Talent Development Core app

Install and configure the Talent Development Core app. Talent Development Core is an app in a suite of ServiceNow apps and features that define a workflow for employees and managers to take control of their career development and growth.

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Install the Talent Development Core application

Install the Talent Development app to enable employees and managers to identify, create, and manage career growth and development plans.

Before you begin

Dependent plugins and apps for Talent Development:

- Manager Hub
- Skills Foundation

  When the Skills Foundation property **sn_skills_int.enable_skills** is set to true, the use of Skills Foundation is enabled for all Talent applications that support the use of Skills Foundation. See Configuring Skills Foundation for more information about Skills Foundation properties.
- Install Employee Center Pro

Role required: admin

About this task

When an administrator installs the Talent Development Core app from the ServiceNow store, it integrates learning, skills identification, aspirations, and planning for a personal career growth and development plan.

Procedure

1. Go to the ServiceNow Store and find the Talent Development Core application using the filter criteria and search bar.

   In the list next to the **Install** button, the versions that are available to you're displayed.
2. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. If demo data is available and you want to install it, select the **Load demo data** check box.

   Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
5. Select **Install**.

Quick start tests for Talent Development Core

Validate that these Talent Development Core features still works after you make any configuration change such as applying an upgrade or developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Danger: By default, the system property that is used to run automated tests is disabled to prevent you from accidentally running these tests on a production system. To avoid data corruption or an outage, run tests only on development, test, and other non-production instances. See Enable or disable executing Automated Test Framework tests.

All test suites and tests should pass on a default implementation. To validate a custom implementation, copy the automated tests and configure them for your customizations.

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Quick start tests are disabled and read-only test templates. By default, they only produce a pass result when you run them with the default demo data that is provided with the application or feature plugin.

To make quick start tests produce a pass result when you run them with your instance-specific data, copy and configure them to use your instance data.

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

The Agile Development 2.0 (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests (com.snc.sdlc.agile.2.0.atf) plugins must be enabled.

Note: When running, demo data is required.

Growth plans

Growth plans quick start tests require activating the Talent Development Core application (sn_egd_core) and loading demo data.

Growth plans quick start tests

Test	Description	Release version
Create and verify a growth plan.	Create a growth plan from the guided flow for Emily Scollan and verify the growth plan on the details page.	Zurich

To learn more about Growth plans, see Growth plans overview.

Aspirations

Aspirations quick start tests require activating the Talent Development Core application (sn_egd_core).

Aspirations quick start tests

Test	Description	Release version
Create and verify an aspiration.	Creates an aspiration and verifies that the aspiration is in the Aspirations table [sn_egd_core_aspiration].	Zurich

To learn more about Aspirations, see Aspirations overview.

Run quick start tests for Talent Development Core

Run quick start tests to verify the Talent Development Core app and features still work after each upgrade and deployment of new applications or integrations. If you customized Talent Development Core, you must configure the quick start tests to ensure they're compatible with your customizations.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Automated Test Framework** > **Tests**.
2. Search and select the quick start tests you want to run.
   For information on available quick start tests, see Quick start tests for Talent Development Core.
3. Click **Run Test**.
   The Test Steps tab provides each step of the quick start test.
   After the tests run, the Step Results tab shows the status of each test step. Screen shots also appear at the top of the form as attachments.

What to do next

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

Administer and maintain the Talent Development Core app

Administering and maintaining the Talent Development Core app requires the role of a ServiceNow administrator or an Talent admin.

Anyone that is assigned the Talent Development Core admin role [sn_egd_core.admin] can maintain Growth Plans, Administration, and Aspirations features and configurations.

Growth Plans

A Talent Development Core admin administers the core application, which is the**Growth Plans Outcome Types**, **Activity Types**, **Activity Categories**, **Activity Templates**, and **Activity Template Recommendations**.

Administration

Set **Properties** Talent Development Core properties, including manager skill approvals, activities settings on launch, and usage of the Skills Foundation application.

Aspirations

- **Aspirations** are created to help employees identify and track personal and work related goals.
- Administrators define **Aspiration Types** that are displayed in the user interface. Employees select different **Aspiration Types** that help them to meet goals.
- Create **Interests** that are available for employees to select when creating an aspiration.

Create Talent Development Outcome Types

As an Talent admin you create outcome types that can be used in growth plans.

Before you begin

Role required: sn_egd_core.admin

About this task

An **Outcome Type** is used to categorize activities into logical outcomes.

Procedure

1. Navigate to **All** > **Talent Development Core** > **Growth Plans** > **Outcome Types**.
2. Select **New**.
3. Complete the **Outcome Types** form.

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Read details about the different fields in Talent Outcome Types reference

4. Select **Submit**.

Create Talent Development Activity Types

As a Talent Development Core admin you create **Activity Types** that are used in growth plans.

Before you begin
Role required: sn_egd_core.admin

About this task
An **Activity Types** help to identify what an activity is intended to do.

Procedure

1. Navigate to **All** > **Talent Development Core** > **Activity Types**.
2. Select **New**.
3. Complete the **Activity Type** form.
   Read details about the different fields in Talent Activity Types reference.
4. Select **Submit**

Create Talent Development Core Activity Categories

As an Talent Development Core admin you create **Activity Categories** that are used in growth plans.

Before you begin
Role required: sn_egd_core.admin or admin

About this task
An **Activity Category** helps to identify what an activity is intended to do.

Procedure

1. Navigate to **All** > **Talent Development Core** > **Activity Categories**.
2. Select **New**.
3. Complete the **Activity Categories** form.
   Read details about the different fields in Talent Activity Category reference.
4. Select **Submit**

Create Talent Development Activity Templates

As a Talent Development Core admin you create **Activity Templates** that are used in growth plans.

Before you begin
Role required: sn_egd_core.admin or admin

About this task
An **Activity Template** logically groups activities by name and requires an **Activity type**.

Procedure

1. Navigate to **All** > **Talent Development Core** > **Activity Templates**.
2. Select **New**.

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3. Complete the **Activity Templates** form.
   Read details about the different fields in Talent Activity template reference.
4. Select **Submit**

Create Talent Development Activity Recommendations

As an Talent admin you create **Activity Template Recommendations** that are used in growth plans.

Before you begin
Role required: sn_egd_core.admin or admin

About this task
Controls whether the activity is **Required** or **Recommended** for the growth plan.

Procedure
1. Navigate to **All** > **Talent Development Core** > **Activity Template Recommendation**.
2. Select **New**.
3. Complete the **Activity Template Recommendation** form.
   Read details about the different fields in Talent Activity Template Recommendation form.
4. Select **Submit**

Set Talent Development Properties

Set properties to control manager skill approvals and activity completion flows.

Before you begin
Role required: sn_egd_core.admin or admin

About this task
Set the following Talent properties:

Talent properties to control manager skill approvals

- **no**: Manager skill approvals are skipped.
- **optional**: Manager skill approvals are automatically suggested, but not required.
- **required**: Manager skill approvals are automatically created.

Set all activities to ready when Growth Plans are launched

Set all activities to ready when **Growth Plans** are **Published**.

Procedure
1. Navigate to **All** > **Talent Development Core** > **Administration** > **Properties**.
2. Select the property settings.
   For more information on Talent properties, read Talent Properties reference.
3. Select **Save**.

Create a Talent Development Core featured growth item

Use the Featured Growth Items table to define the roles, skills, and opportunities that appear in the Featured by your company widget. This widget can be used to promote desirable career opportunities and skills that foster growth and development for employees within your organization.

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Before you begin

Role required: admin [sn_egd_core.admin or sn_egd_shared_lib.admin]

Procedure

1. Navigate to **All** > **Talent Development Core** > **Administration** > **Featured Growth Items**.
2. Select **New**.
3. Use the **Type** field to specify the feature growth item you want to promote.

Feature growth item	Description
Job Title	A role you want to promote to employees with in your organization.
Skill	A skill you want to promote that is beneficial to the growth and development of your em ployees.
Opportunity	An opportunity you want to promote for ca reer advancement.

The form displays new fields that are specific to the option you selected in the **Type** field.

4. Set the corresponding fields that appear on the form depending on the option you selected in the **Type** field.

Field	Description
Role level	The title for the role you want promote as a feature growth item. This field only appears when the **Type** field is set to **Job Title**.
Skill	A critical skill you want to promote as a fea ture growth item that your employees can ac quire. This field only appears when the **Type** field is set to **Skill**.
Skill level	The level of expertise required for the skill that you selected in the **Skill** field. This field only appears when the **Type** field is set to **Skill**.
Opportunity type	An opportunity you want to promote as a fea ture growth item to employees within your or ganization. This field only appears when the **Type** field is set to **Opportunity**.
Job requisition	A job requisition number to identify the job role that you want to promote. This field only appears when the **Opportunity type** field is set to **Internal Job**.

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5. **Optional:** Add an image for the opportunity that you want to promote by selecting the **Click to add...** link in the **Image** field.
   The **Image** field only appears when the **Type** field is set to **Opportunity**.
6. **Optional:** Indicate the order in which the feature growth item appears by entering a numeric value in the **Order** field.
7. Make your featured growth item available to employees within your organization by selecting the check box associated with the **Active** field.
8. **Optional:** Specify the employee groups to whom the feature growth item is available by using the **User criteria** field.
9. **Optional:** Enter a description in the **Description** field to provide further details about the role, skill, or opportunity you want to promote.
10. Select **Submit**.

Result

The feature growth item that you defined appears in the Featured by your company widget for the employees you specified in the **User criteria** field.

The Featured by your company widget appears on the Aspirations landing page.

> **Important:** Only job titles and skills that you define using the Featured Growth Items table will appear in the Featured by your company widget on the Aspirations landing page. The opportunities that you define will appear in the Featured by your company widget on the Opportunity Marketplace landing page.

Add sample texts to Talent Development related content

As an Talent admin you can add **Sample Text**.

Before you begin

Role required: sn_egd_core.admin or admin

Procedure

1. Navigate to **All** > **Talent Development Core** > **Administration** > **Sample texts**.
2. Select **New**.
3. Complete the **Sample texts** form.
   Read details about the different fields in Talent Sample texts reference.
4. Select **Submit**

Add Talent Development Aspirations

An Talent admin can manage **Aspirations** that employees create and share.

Before you begin

Role required: sn_egd_core.admin or admin

About this task

Aspirations are used by employees to identify and track personal and professional goals. An employee can create a growth plan from an **Aspiration**.

Procedure

1. Navigate to **All** > **Talent Development Core** > **Aspirations** > **Aspirations**.
2. Select **New**.

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3. Complete the **Aspiration New record** form.
   Read details about the different fields in Talent Aspirations reference.
4. Select **Submit**

What to do next
As an Talent admin you can create and maintain aspiration types, see Add Talent Development Aspirations Types.

Add Talent Development Aspirations Types

As an Talent admin you can add or manage **Aspiration Types**, which are used to identify employee aspirations.

Before you begin
Role required: sn_egd_core.admin or admin

Procedure
1. Navigate to **All** > **Talent Development** > **Aspirations** > **Aspiration Types**.
2. Select **New**.
3. Complete the **Aspiration Type New record** form.
   To see details about the different fields, see Talent Aspiration types form.
4. Select **Submit**

Add Talent Development Interests

As a Talent Development Core admin, you can add **Interests** that help employees understand and create an aspiration.

Before you begin
Role required: sn_egd_core.admin or admin

Procedure
1. Navigate to **All** > **Talent Development Core** > **Aspirations** > **Interests**.
2. Select **New**.
3. Complete the **Interests** form.
   To see details about the different fields, see Talent Interest form.
4. Select **Submit**.

License Talent Development Core users

Talent Development Core uses the Employee Profile licensing feature to license user.

Before you begin
Role required: sn_employee.admin or admin

Procedure
1. Navigate to **All** > **Employee Profile** > **Application licensing** > **Employee licensing**.
2. Select **New**.
3. Fill in the **Employee Application Access Criteria** form.
   Read about the fields in this form in Employee Application Access Criteria reference. Use a filter condition that meets your criteria for who should be licensed.

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Note: All conditions on a single criteria form must be met. However, a user doesn't have to meet all of the criteria listed for employee licensing, they just have to meet the criteria for one of the records.

4. Select **Submit**.

What to do next

You can view the list of licensed users by navigating to **All** > **Employee Profile** > **Application licensing** and opening a record.

View Talent Development Core licensed profiles

You can view a list of profiles that are licensed for Talent Development.

Before you begin

Role required: sn_egd_core.admin or admin

About this task

The **Employee Profile** licenses users by the employee profile number. Each number is associated with a user. You can view the user name in the profile.

Procedure

1. Navigate to **All** > **Employee Profile** > **Application licensing** > **Employee licensing**.
2. Open an existing record.
   If you don't have any existing **Employee Application Access Criteria** records, you can create a record and view the matched profiles.
3. In an existing **Employee Application Access Criteria** record, select the link above the **Criteria** field.
   The link shows the number of profiles that match the condition. If you only see the employee profile number, select the gear icon, and add the **User** field to the selected column.

View Growth plans related information in the Now Assist Admin console

From the Now Assist Admin console, view related information for Growth plans created with the help of Now Assist.

Before you begin

Role required: admin

About this task

To view Growth plans related information from the Now Assist Admin console, you must be assigned these three roles.

- [sn_na_analytics.viewer]
- [platform_analytics_admin]
- [sn_td_na.admin]

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Open the record for the user that you're adding roles to.
3. In the **Roles** related list, select **Edit**.

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4. Select the roles that you want to add.
5. Select **Save**.

What to do next
To learn more about the Now Assist Admin console, see Now Assist Admin console.

Achievements and Credentials in Talent Development Core

View all types of user credentials acquired outside the current organization (currently populated from Credly) in Achievements and Credentials.

Achievement credentials, like badges, are digital or physical symbols that recognize and verify an individual's accomplishment, skill, or participation in a specific activity or goal.

The credentials imported from Credly have skills data, and other metadata such as user and badge information. Skills associated with the Credly badges are analyzed as follows:

- If Credly badge skills match exactly or mapped to the skills in the skills library, they are added to the employee profile, in case the employee doesn't already have them.
- If a skill exists in the employee profile and also receives a badge associated with the same skill, then the employee gets a Prompt (Review Skills Profile Prompt) to update the skill's proficiency. For more information, see Proactive Prompts for Skills Foundation.
- If the skill is new, it's added to the queue pipeline for harmonization. For more information, see Dynamic skill import for harmonization.
- The harmonized new skills are added to the skills library (cmn_skills table) and updated in the credential badge skills metadata after the import is complete.
- Employee's skill profile is updated with the new skill(s) linked to their earned badge.

View achievement credential templates

View achievement credential templates in Achievements and Credentials.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Achievements and Credentials** > **Achievement Credential Templates**.
2. Select an existing record.
3. On the achievement credential template page, view the details stored in the following format.

Achievement credential Template form

Field	Description
Name	Name of the credential template.
Credential type	Information about the type of credential.
Source	Source of the credential. For example: Credly.
Issuer	Details of the issuer of the credential template.
Image URL	URL of the credential source.
Achievement template skills	Skills attached to the template. To attach a new skill to the template, see .

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Add skill to an achievement template

Associate a skill to an achievement credential template in Achievements and Credentials.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Achievements and Credentials** > **Achievement Credential Templates**.
2. Select an existing record.
3. Click **New** in the Achievement Template Skills related list.
   On the form, fill in the fields:

Achievement Template Skills form

Field	Description
Credential template	Name of the credential template record that you want to associate a skill to. **Note:** Use the information icon,to view the credential template record
Skill	Option to select the skill you want to associate to the achievement template. **Note:** Use the search option to look up from a list of existing skills.

4. Select **Submit**.

Using the Talent Development Core application

Managers and employees can create and track career development and growth plans. Managers access Talent from Employee Center menus **Your career** > **Growth plans**to track employee development.

Create a growth plan with the help of Now Assist

Use Now Assist to help create a growth plan to give your career goals guidance and structure.

Before you begin

Role required: No role is required, but you must be a licensed user.

Note: You must be in a user group that is linked with the Talent Development apps.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Your Career** > **Growth plans**.
3. Select the **Create a growth plan** button.
4. Select **Build with Now Assist**.
5. Enter text in the **Write directions for Now Assist or use examples below** text box.

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You can write your own directions by adding your goals and milestones, or use the provided template. The more details that you add the better the resulting growth plan matches your intentions.

Here's an example of how to write directions: "I want to improve my public speaking and presentation skills to help me get to the next level in my career."

6. Select **Generate draft**.
7. Review the draft growth plan generated by Now Assist.

   You have several options on how to proceed.

   - **Discard**: Discard this plan if you don't like it. The plan and any activities you added are deleted.
   - **Edit directions**: Edit the directions to generate a new growth plan draft. Any existing drafts are deleted.
   - **Share**: Get feedback from your manager on your plan draft and work together to create a better plan.
   - **Launch plan**: Share this plan with your manager as soon as it launches. Is your plan ready to go?

   You can also add activities.

   - **Learning activities**: Search for a course name or keyword to find more learning activities.
   - **Check-in**: Schedule a conversation and add it to your calendar once you have launched your plan.
   - **Mentorship**: Add a reminder to your growth plan that you want to connect with a mentor. See, Enroll as a mentor or mentee.
   - **Something else**: Add your own activity to your plan.

Create a growth plan

Create a growth plan to give your career goals guidance and structure.

Before you begin

Role required: No role is required, but you must be a licensed user.

About this task

Growth plans are based on your individual needs and aspirations and help you make the most of your potential and reach your career goals.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. At the **Your Career** drop-down list, select **Growth plans**.
3. Select the **Create a growth plan** button.
4. Select **Get Started** if this is your first time creating a growth plan.

   Note: If you have any open aspirations or recent conversations, they might be displayed as potential **focus** areas. If you don't have any open aspirations or conversations, you can build a plan on your own by selecting **Build a plan from scratch** option.

5. Enter a plan name in **Growth plan name**.

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6. **Optional:** Enter Description.
7. Select the **Next** button.

   Tip: Creating a plan starts to process and find some activities for your plan.

8. Select the **Next** button.

   Tip: If learning and activities are installed, the Growth plans app might show some possible learning that you're interested in. You can search learning to add things to your growth plan.

9. Select **Create plan**

Result
The draft growth plan is created and shared with your manager once the plan is launched.

What to do next
- Launch a plan so it can be shared with your manager.
- Review your progress.
- Continue to edit your growth plan.

Edit a growth plan

Edit, set a due date, or add additional activities to a growth plan.

Before you begin
Role required: None

About this task
Growth plans are based on your individual needs and aspirations and can help you make the most of your potential and reach your career goals.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. At the **Your Career** drop-down list, select **Growth plans**.
3. Select a draft or published growth plan.
4. Select the button next to the **Mark complete** button (if viewing a published growth plan).
5. Select **Edit plan**.
6. **Optional:** In the **About this plan** section, select the **Set due date** link to give your growth plan a due date.
7. **Optional:** Select the **Add an activity** button to additional activities.
8. Create the activity by following the fly-out prompts.
9. Select **Finish editing** (if viewing a published growth plan).

   Note: Different options might be available based on the Talent Development related plug-in installs and what skills you selected to focus on. The **Something else** option will always be available. If you selected skills for your growth plan, the **Skill validation** option will be available and might be displayed if you already have **Skill validation** tasks for all your focus skills. The **Learning** and **Check-in** options might be displayed when **Learning** and **Career Conversations** are installed.

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Result
The activity will be added to your growth plan.

What to do next
- Launch plan so it can be shared with your manager.
- Review your progress.
- Continue to edit your growth plan.

Create a growth plan from an aspiration or main skill

Create a growth plan based on one of your aspirations or main skill.

Before you begin
Role required: None

About this task
Growth plans are based on your individual needs and aspirations and can help you develop your main skills.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. At the **Your Career** drop-down list, select **Growth plans**.
3. Select the **Create a growth plan** button.
4. Select **Get Started** if this is your first time creating a growth plan.
5. Select the skill-based **Aspiration.**
6. Select the **Next**button.

> **Note:** If **Learning** is installed, growth plans might show some suggested learnings. If the Skills Foundation property **sn_skills_int.enable_skills** is set to **true**, growth plans might show learning courses related to the skill you've selected for your aspiration, if applicable. You can search learning to add courses to your growth plan.

7. Select **Create plan**

Result
The draft growth plan is created and will be shared with your manager once the plan is launched.

What to do next
- Launch plan so it can be shared with your manager.
- Review your progress.
- Continue to edit your growth plan.

Create a growth plan from an aspiration

Create a growth plan based on one of your aspirations to help you move towards a new role.

Before you begin
Role required: None

About this task
Growth plans are based on your individual needs and aspirations and can help you move towards a new role.

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. At the **Your Career** drop-down list, select **Growth plans**.
3. Select the **Create a growth plan** button.
4. Select **Get Started** if this is your first time creating a growth plan.
5. Select the role-based **Aspiration.**
6. Select the **Next**button.

> **Note:** If the Skills Foundation property **sn_skills_int.enable_skills** is set to **true**, growth plans will give you the option to select skills to focus on that are related to the role.

7. Select additional activities for your growth plan.

> **Note:** The additional activities might be either required or optional.

8. Select **Create plan**

> **Note:** If **Learning** is installed, growth plans might show some suggested learnings. If the Skills Foundation property **sn_skills_int.enable_skills** is set to **true**, growth plans might show learning courses related to the skill you've selected for your aspiration, if applicable. You can search learning to add courses to your growth plan.

Result
The draft growth plan is created and will be shared with your manager once the plan is launched.

What to do next

- Launch plan so it can be shared with your manager.
- Review your progress.
- Continue to edit your growth plan.

Create a growth plan from discussions

Create a growth plan based on your discussions or aspirations.

Before you begin
Role required: None

About this task
Growth plans are based on your individual needs and aspirations and can help you develop your main skills.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. At the **Your Career** drop-down list, select **Growth plans**.
3. Select the **Create a growth plan** button.
4. Select **Get Started** if this is your first time creating a growth plan.
5. Select the **Aspiration** or **Discussion.**
6. Select the **Next**button.

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Note: If creating a growth plan for a discussion, provide the **Growth plan name** and a description and select the **Next** button. The next screens might show you additional activities you can add to your growth plan and might be either required or optional.

7. Select **Create plan**

Note: If **Learning** is installed, growth plans might show some suggested learnings.

Result
The draft growth plan is created and will be shared with your manager once the plan is launched.

What to do next
- Launch plan so it can be shared with your manager.
- Review your progress.
- Continue to edit your growth plan.

View and edit employees' growth plans

Review your employees' growth plans to keep track of their progress and help them in their career development.

Before you begin
Role required: sn_mh.manager_hub_user

About this task
Growth plans are based on employees' individual needs and aspirations and can help them make the most of their potential and reach their career goals.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. At the **Your Career** drop-down list, select **Growth plans**.
3. Select and use the **sorting, searching, and filtering** sections to find the desired growth plan.
4. Select the button next to the **Mark complete** button (if viewing a published growth plan).

Note: Any growth plan shared with you will be displayed in the list, including **Draft Growth plans**.

5. Select the desired **Growth plan**.
6. Review the growth plan and activities.
7. Select **Edit plan**.

Note: Draft growth plan will already be editable.

8. **Optional:** In the **About this plan** section, select the **Set due date** link to give your growth plan a due date.
9. **Optional:** Select the **Add an activity** button to additional activities.

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Note: Different options might be available based on the Talent Development related plug-in installs and what skills you selected to focus on. The **Something else** option will always be available. If you selected skills for your growth plan, the **Skill validation** option will be available and might be displayed if you already have **Skill validation** tasks for all your focus skills. The **Learning** and **Check-in** options might be displayed when **Learning** and **Career Conversations** are installed.

10. Select **Finish editing** (if viewing the publishing Growth plan).

Result
The activity will be added to your growth plan.

What to do next
- Launch plan so it can be shared with your manager.
- Review your progress.
- Continue to edit your growth plan.

Create a Talent Development Aspiration

Create Aspirations to define and track professional and personal interests.

About this task

Note:

When there are no role levels and no job profile configured, the Aspiration choice isn't available in the Your Career drop-down list.

Before you begin
Role required: None

Procedure
1. From the Employee Center, navigate to **Your Career** > **Aspirations**.
2. Select **Create a new aspiration**.
3. Select from the available **Aspiration Types**.
   If you don't see an aspiration type that matches your goal, you can select **Something else** to create a customized aspiration.
4. Select **Next**.
5. Select from the available **Interests**.
   If you selected **Something else**, you go directly to a form for creating your **Aspiration**.
6. Fill in the form for creating an **Aspiration**.
   Some of the fields are filled in with your previous selections. Complete any empty or selectable fields.
7. Select **Next**.
   You have the option to **Save as draft** so that you can take sometime to think about your aspiration before submitting it.
8. Select who you want to share your aspiration with.
9. Select **Submit**.

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What to do next
You can create a **Growth Plan** from your **Aspiration**. For details about creating growth plans, see Create a growth plan

View Credly badges

As an employee, sync external badges into your organization's Credly account and view them on your career profile.

Before you begin
Role required: learning.user

Procedure
1. Navigate to **All** > *Employee Center*.
2. In the *Employee Center*, navigate to **Profile** > **Career**.
3. Select the **Achievements** menu item and view your Credentials and badges.
4. Select **Get credentials** to import your credentials from the Credly application.
5. Select **Refresh credentials** to sync your organization's Credly account with the latest credentials in your Credly account.

> **Note:** If you don't see your credentials, contact your admin to setup your Credly account.

Integrate with the Talent Development Core application

Integrations enable the expansion of features and services among available apps.

Talent Development Core application reference

Administrators use reference information to configure and maintain applications and features.

Talent Growth Plan reference

Employee growth plans are created by administrators and used by managers and employees to help facilitate and track growth plans.

Growth plan fields reference

Field	Description
Actual start	The date that an employee starts working on a growth plan.
Additional comments (Customer visible)	Comments that can be added to help the employee and manager understand the purpose of a growth plan. Comments can be instructions or conceptual information.
Assigned to	The name of the employee that the growth plan is assigned to.
Description	A description of the growth plan. The description helps employees and managers understand what the growth plan is focused on.

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Growth plan fields reference (continued)

Field	Description
Due date	A date for when the growth plan is expected to be complete. Due dates aren't required for growth plans.
Name	The name of the growth plan helps managers and employees determine what the growth plan is intended for.
Outcome type	An outcome type represents the intent of the growth. Growth plans can include job related or personal goals. • **Custom** types are used for personal growth plans or a growth plan that doesn't fit into **Job growth** or **Skill development** types. • **Job growth** types are used for growth plans the fit into the regular career goals and development of an employee. • **Skill development** types are used to track focused efforts on developing a skill.
Role level	A role level is associated with skills that have different levels of accomplishment such as beginner or expert.
Shared with	The manager who the growth plan is shared with.
State	The current standing of the growth plan. • **Canceled** state means that the growth plan is no longer active. • **Closed complete** state indicates that all the requirements of the growth plan are finished. • **Closed incomplete** state indicates that the growth plan wasn't completed, but it has been closed. State indicates that the growth plan is no longer active. • **Published** state indicates that the employee has started the growth plan and has shared it with their manager. • **Draft** state means that the employee is still editing, adding activities to the growth plan but hasn't started it.

Talent Outcome Types reference

Outcome types are created by administrators.

An **Outcome Type** indicates the desired outcome of a growth plan. Administrators define outcome types to help managers and employees create meaningful growth plans.

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Outcome type fields reference

Field	Description
Active	Indicates whether this outcome type is available for use in a growth plan.
Name	The name of an outcome type that indicates what the achievement goal is for the growth plan.
Order	A numeric value that determines the display order of outcome types in the user interface (UI).
Value	A string that's used for tracking and grouping outcome types.

Talent Properties reference

Properties control how skills approvals are managed and whether Skills Foundation is used.

Property to control manager skill approvals in Growth plans

- Select **no** to skip approvals.
- Select **optional** to recommend approval. Optional approvals aren’t required.
- Select **required** to create required approvals.

Set all activities to ready when Growth plans are launched

Select the check box to set the property to **Yes**. When the property is set to yes, all activities in the growth plan are automatically set to the ready state.

Talent Activity Types reference

Administrators create activity types that are used by managers and employees.

Activity type fields

Field	Description
Active	Select **Active** to make the activity type available for use in Growth plans.
Description	The description displayed in the user interface (UI) for the activity type.
Name	The name of the activity type.
Order	A numeric value used to determine the display order of activity types.
Value	The value used to track the activity type.

Talent Activity Category reference

Administrators create activity categories that are used by managers and employees.

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Activity Category fields

Field	Description
Active	Select **Active** to make the activity category available for use in Growth plans.
Description	The description displayed in the user interface (UI) for the activity category.
Label	The UI visible text for the category.
Name	The name of the activity category.
Order	A numeric value used to determine the display order of activity categories.
Value	The value used to track the activity category.

Talent Aspirations reference

Administrators manage aspirations used by managers and employees.

Aspiration form

Field	Description
Aspiration type	Select for a list of aspirations available in your organization. Administrators create different **Aspiration types**. Here are some examples of types of aspirations. • **General** • **Interest** • **Position** • **Skill**
Comments	Comments can be added by you, or people you share your aspiration with.
Details	Details of the aspiration can help to keep you on track with the goals you have for the aspiration.
Employee	The employee profile number of the employee who created the aspiration.
Name	A descriptive name of your aspiration.
Shared with	Select from the list of people in your organization with who you can share your aspiration.
State	Use the state to track the stages of your aspiration. • **Draft** • **In Progress**

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Aspiration form (continued)

Field	Description
	• **Completed** • **Archived**
Timeframe	A general guiding time within which you plan to complete your aspiration. • **Within the next six months** • **Within the next year** • **Within the next several years**

Talent Feature growth item reference

Administrators create featured growth items that are used by managers and employees.

Note: This form is dynamic. The fields that appear depend on the options you select as you complete the form.

Featured growth item reference

Field	Description
Active	Option to indicate whether the feature growth item is available for use to the employees you specify in the **User criteria** field.
Description	Description that provides further details about the feature growth item you want to define.
Image	Image for the opportunity that you want to promote as a feature growth item. This field only appears when the **Type** field is set to **Opportunity**.
Job requisition	Job requisition number to identify the job role that you want to promote as a feature growth item. This field only appears when the **Opportunity type** field is set to **Internal Job**.
Opportunity type	Type of opportunity that you want to promote as a feature growth item to employees within your organization. This field only appears when the **Type** field is set to **Opportunity**.
Order	A numeric value that determines the order in which a feature growth item appears in the user interface (UI).

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Featured growth item reference (continued)

Field	Description
Role level	Title for the role that you want promote as a feature growth item to employees within your organization. This field only appears when the **Type** field is set to **Job Title**.
Skill	Skill that can be selected from the list of available skills for your organization. This field only appears when the **Type** field is set to **Skill**.
Skill level	Level of expertise in a skill that is required for the feature growth item you want to define. This field only appears when the **Type** field is set to **Skill**.
Type	Type of feature growth item. Options are as follows: • Select **Job Title** to indicate the title of a job that you want to promote as a feature growth item. The job title that you want to promote appears in the **Role level** field. • Select **Skill** to promote a skill as a feature growth item that your employees can acquire. • Select **Opportunity** to define an opportunity type you want to promote as a feature growth item.
User criteria	Criteria to target specific groups of employees to whom the feature growth item is available. Groups, created by administrators, are logical containers composed of similar users.

Talent Activity template reference

Activity templates are used by managers and individuals to create activities in a growth plan. Administrators create activity templates.

Activity Template form

Field	Description
Active	Select **Active** to indicate that the activity template is available to use.
Activity type	Select from the list of activity types available in your organization.

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Activity Template form (continued)

Field	Description
Assignee	The role that this template is intended for. • **Employee** • **Manager**
Activity category	A list of available categories for your organization, such as: • **Development** • **Other** • **Review** • **Validation**
Name	Enter a meaningful that managers and employees can understand.
Table	Select a table to use for tracking the activity from the list of tables.
Template	The location to the activity.
User criteria	Select a criterion for the users that the template is intended for.

Talent Sample texts reference

Sample text is content that is used in different types of content in a selected document. Administrators create sample text templates.

Sample text form

Fields	Description
Active	Indicates whether this sample text is available for use.
Linked content	Add links to the content that you want to add to the sample.
Name	A descriptive name for the content sample. The name of the sample helps administrators select with documents to add the content to.
Order	A numeric value that determines the display order of the sample text in the user interface (UI).
Sample for	Select a denouncement from the list where the sample text is used.
Sample text	The sample text that's used in the selected document.
Table	The table used to track where the sample text is used.

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Talent Aspiration types form

Administrators create aspiration types that are use by employees and managers.

Aspiration Type form

Field	Description
Active	When selected, the aspiration type is available to be used.
Application	The application that's associated with this aspiration type.
Description	Details about the type of aspiration that helps guide you to the appropriate aspiration.
Icon	Select an icon that's displayed for each aspiration. You're responsible to provide any icon files for your instance.
Name	A descriptive name of the aspiration type that helps employees identify which type they want to use.
Order	A numeric value that determines the order in which the **Aspiration type** is displayed in the user interface (UI).
Tip	Text that's display in the UI with each listed aspiration type.
Title	The UI text that's visible for each listed aspiration type.

Talent Activity Template Recommendation form

Administrators create activity template recommendation templates that employees and managers use to create career growth plans.

Activity Template Recommendation reference

Fields	Description
Active	When selected, the activity template is available to be used in a conversation.
Activity template	Select an **Activity template** from the list of template available to your organization.
Availability	• Select **Recommended** to make the activity available as a choice to use, but it isn't required. • Select **Required** to make the activity required to use.
Description	More detailed information about the activity. Detailed information can help managers and employees decide if they want to use this activity.

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Activity Template Recommendation reference (continued)

Fields	Description
Name	The title is visible in the user interface (UI). A helpful title provides information to help make a choice whether to use the activity.
Outcome type	• Select **Free form** if the activity template doesn't fit into the **Job growth** or **Skill development** categories. • Select **Job growth** if the activity is directly related to growth and development for your job. • Select **Skill development** for training that's related to a any skill you want to improve. Skill development can be job-related or for personal development.
User criteria	Select the criteria that must meet to have access to this talking point.

Talent Interest form

Administrators create interests that employees and managers use to create career growth plans.

Interest reference

Fields	Description
Active	When selected, the aspiration interest is available to be used in a conversation.
Description	More detailed information about the aspiration interest. Detailed information can help managers and employees decide if they want to use this activity.
Name	A name of the aspiration interest that's visible in the user interface (UI).
Order	A numeric value used to determine the display order of aspiration interest.
Related skills	Select from the list of skills that are related to your aspiration.
Resource link	Links to additional resources that may help to fulfill the aspiration.
Title	A descriptive name for the interest that helps you determine if this interest is appropriate for your aspiration.
Topic	Learning topics that are available in your organization.

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Components installed with Talent Development Core

Several types of components are installed with Talent Development Core, including roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles in Talent Development Core

Application	Role title [name]	Description
Talent Development Core	Admin [sn_egd_core.admin]	The Admin role gives users permission to update and maintain Talent Development Core features.
Talent Development Core	Content Manager [sn_egd_core.content_manager]	The Content Manager role gives users permission to maintain and update Talent related content.

Tables

Tables are used to track and maintain relationships among different ServiceNow applications and features.

Tables installed with Talent Development Core

Application	Table label [name]
Talent Development Core	Activity Template Recommendation [sn_egd_core_activity_config]
Talent Development Core	Activity Template [sn_egd_core_activity_template]
Talent Development Core	Activity Type [sn_egd_core_activity_type]
Talent Development Core	Aspiration [sn_egd_core_aspiration]
Talent Development Core	Aspiration Type [sn_egd_core_aspiration_type]
Talent Development Core	Career Hub Spotlight [sn_egd_core_career_hub_spotlight]
Talent Development Core	Featured growth item [sn_egd_core_featured_growth_item]
Talent Development Core	Interest [sn_egd_core_interest]
Talent Development Core	Aspiration Skills [sn_egd_core_m2m_aspiration_skill]
Talent Development Core	Context [sn_egd_core_m2m_plan_context]
Talent Development Core	Outcome Type [sn_egd_core_outcome_type]
Talent Development Core	Peer Configuration [sn_egd_core_peer]

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Tables installed with Talent Development Core (continued)

Application	Table label [name]
Talent Development Core	Growth Plan [sn_egd_core_plan]
Talent Development Core	Growth Plan Activity [sn_egd_core_plan_activity]
Talent Development Core	Sample text [sn_egd_core_sample_text]

Hiring Core

Hiring Core provides a repository where you can store information that you've created or received from any third party talent acquisition platform for your hiring requirements.

Tables installed

Table	Description
sn_ta_hiring_core_job_application	Job application table.
sn_ta_hiring_core_job_applicant	Job applicant table.
sn_ta_hiring_core_job_hiring_team	Job hiring team.
sn_ta_hiring_core_job_requisition	Job requisition table.
sn_ta_hiring_core_recruitment_task	Recruitment task table.
sn_ta_hiring_core_job_posting	This table is used by Opportunity Marketplace to support internal hiring.

Note: You can use the record tables according to your requirement.

Employee Application Access Criteria reference

Talent Development uses the **Employee licensing** feature in the Employee Profile app to license users.

Access Criteria reference

Field	Description
Application	The scope for creating the access criteria.
Criteria	The criteria that are evaluated to license users for the application. Users must meet all the conditions in order to be licensed.
Employee Licensed Application	The application that the licensing is for.
Name	A descriptive name for the access criteria.

Skills Foundation

The ServiceNow® Skills Foundation application is an AI-driven platform that you can use in your organization to develop a workforce that is based on skills.

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Important: Skills Foundation uses Artificial Intelligence (AI) to help your organization in talent management and employee development. Skills Management application enables you to manually create skills and skill categories, and also assign them to users manually. Activating the Skills Foundation plugin (com.sn_skills_int) will also activate the Skills Management plugin (com.snc.skills_management). For information on Skills Management, see Skills Management.

https://player.vimeo.com/video/1118680633?h=d1e96c2ec1&badge=0&autopause=0&player_id=0&app_id=58479

You can empower your employees by enhancing their essential skills as part of their career aspirations using Talent Development and Skills Foundation.

The key components of the Skills Foundation application are:

Bring your own skills ontology

A dynamic AI-driven skills ontology can help your organization to define and measure the relationships between the skills, roles, and your employees. The skills ontology provides actionable data that guides learned decisions and effectively addresses skill gaps. Powered by AI, the skills ontology is constantly learning, inferring, collecting, and maintaining information about the skills, which means that your organization need not update the data manually. You can augment the skills ontology with your organization's internal data to further enrich the ontology.

Skills-based career data

Match the career data of your organization with skills to enhance the development of your employees by aligning actual job roles with relevant skills. You can empower your employees to excel in their current roles while fostering opportunities for future growth and advancement within the company.

Proactive Prompts to drive adoption

Drive adoption in your organization by sending prompts proactively to your employees and managers so that they perform the specific tasks in their natural flow of work. For example, prompts can be used to request an employee to update their skills or for a manager to validate the skills of their team. You can use Proactive Prompts in multiple engagement channels like Microsoft Teams, Microsoft Outlook, Zoom, and the short messaging services (SMS). Your employees can easily update their skills.

Employee skills profile

Build a complete profile of your talent with a comprehensive view of the skills that employees possess. Your employees can regularly monitor and update their skills profiles to gain the knowledge and capabilities to thrive in dynamic business environments. By leveraging their skills profiles, your employees can easily import their skills from resumes or LinkedIn profiles.

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Get started

Explore



Learn how the Skills Foundation application empowers customers on their journey toward Talent Development.

Install and configure



Install and configure the Skills Foundation app and related features.

Use



Learn how to view and manage your skills profile.

Reference



Get details about components like fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Skills Foundation

The Skills Foundation platform uses AI Search to process your industry skills data. Learn how Skills Foundation can help transform your organization to build a workforce that is based on skills.

Overview of Skills Foundation

The core capability of the platform is the underlying technology that resides in the Skills Foundation engine.

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Skills Foundation for Talent Development

The Skills Foundation engine acts as the foundational layer that powers all the capabilities within Talent Development. Talent Development applications use skills at its core to guide managers and employees through their career plans. This approach not only supports individual development but also contributes to achieving better business outcomes. For more information, see Growth Experiences.

Note: Skills Foundation is only integrated with Talent Development applications.

Skill Validation in Manager Hub

As a manager, you can review and validate the skill proficiency levels updated by your employees by opening the conversations scheduled with them. Within Conversations there's a dedicated section that offers details about skills that require validation. For more information, see Validate skills in Manager Hub.

Skills-driven Learning recommendations

Talent Development uses Skills Foundation to deliver learning recommendations for employees and their managers, keeping them engaged and productive. For more information, see Learning overview. The Skills Foundation application integrates with Learning to introduce skills-driven learning search results that your managers can use to recommend courses based on the skills of your employees. For more information, see Learning integration with Skills Foundation.

Proactive Prompts integrated with Skills Foundation

Proactive Prompts enable contextual and proactive engagement for your managers and employees by bringing actionable insights as prompts into their flow of work. You can use these prompts in multiple engagement channels, such as Microsoft Teams, Microsoft Outlook, Zoom, and the short messaging service (SMS). For more information, see Proactive Prompts for Skills Foundation.

Support for multiple languages in Skills Foundation

Employees can view the skill names and their descriptions translated when they change their preferred language to a non-English language. For information on the languages supported by AI Search, see Activate a language.

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Note:

- Make sure that the respective language plugins are installed to ensure that the skill translations are also downloaded for those languages.
- If you have custom skills, you must get the custom skills translated and upload them separately.
- When searching for skills using the Search option, use only your preferred language. For example, if your preferred language is Dutch, you search in Dutch.

Hiring core for Skills Foundation

Hiring Core provides a repository to store information for your hiring requirements. Activate the Hiring Core plugin (app-hiring-core) to start using it. Skills Foundation runs predictions on the data in the hiring core tables and offers skill recommendations for role groups. For more information, see Hiring Core.

Key benefits

Connect skills to action in the transformation of your workforce and accelerate business outcomes by using the Skills Foundation application.

Skills Foundation benefits

Features	Benefits
Employee skills profile	Provides a comprehensive view of the skills that your employees have.
Pre-seed employee skills	Identifies the essential skills of an employee by analyzing the external data and data provided by employees about skills and titles. Prompt employees to update their skills based on this information.
About Job Architecture	Associates the career data of your organization with skills.
Proactive Prompts for Skills Foundation	Enables contextual and proactive engagement for your managers and employees by bringing actionable insights as prompts into their flow of work.
Import skills from your resume or LinkedIn profile	Imports skills from resumes and LinkedIn profiles of the employees. **Note:** This feature is only available to customers with a Pro-plus license.
Validated skills	Managers validate the skill proficiency level of employees in the Manager Hub and employees can see these validated skills on their skills profile.
View activity insights	Managers can view and review activities related to the skill that an employee has made progress on before validated them.
Add skills by using the skill recommender	Enables your employees to search for skills that they're interested in developing or

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Skills Foundation benefits (continued)

Features	Benefits
	improving and then adding them to their skills profile.

Skills Workspace

You can update and maintain skills and job architecture data from a single place using the Skills Workspace.

Workspace users

Access to the Skills Workspace requires the sn_skills_int_ws.workspace_user role or any role that contains it. For more information on roles in Skills Foundation, see Components installed with Skills Foundation.

Home page

Access the following information on the Skills Foundation Home page to manage skills-related tasks:

- Skills data overview.
- Critical information gaps that require your immediate attention such as role groups without a role level, skills without a skill level type, or role groups without skills.
- Actionable insights - Notifications of various system checks as suggestions for the users to act on to improve their skills or job architecture data. The **View records** option enables you to see the detailed list view of the records.
- Overview and Health - Charts to enable you to monitor job architecture data and skills inventory.

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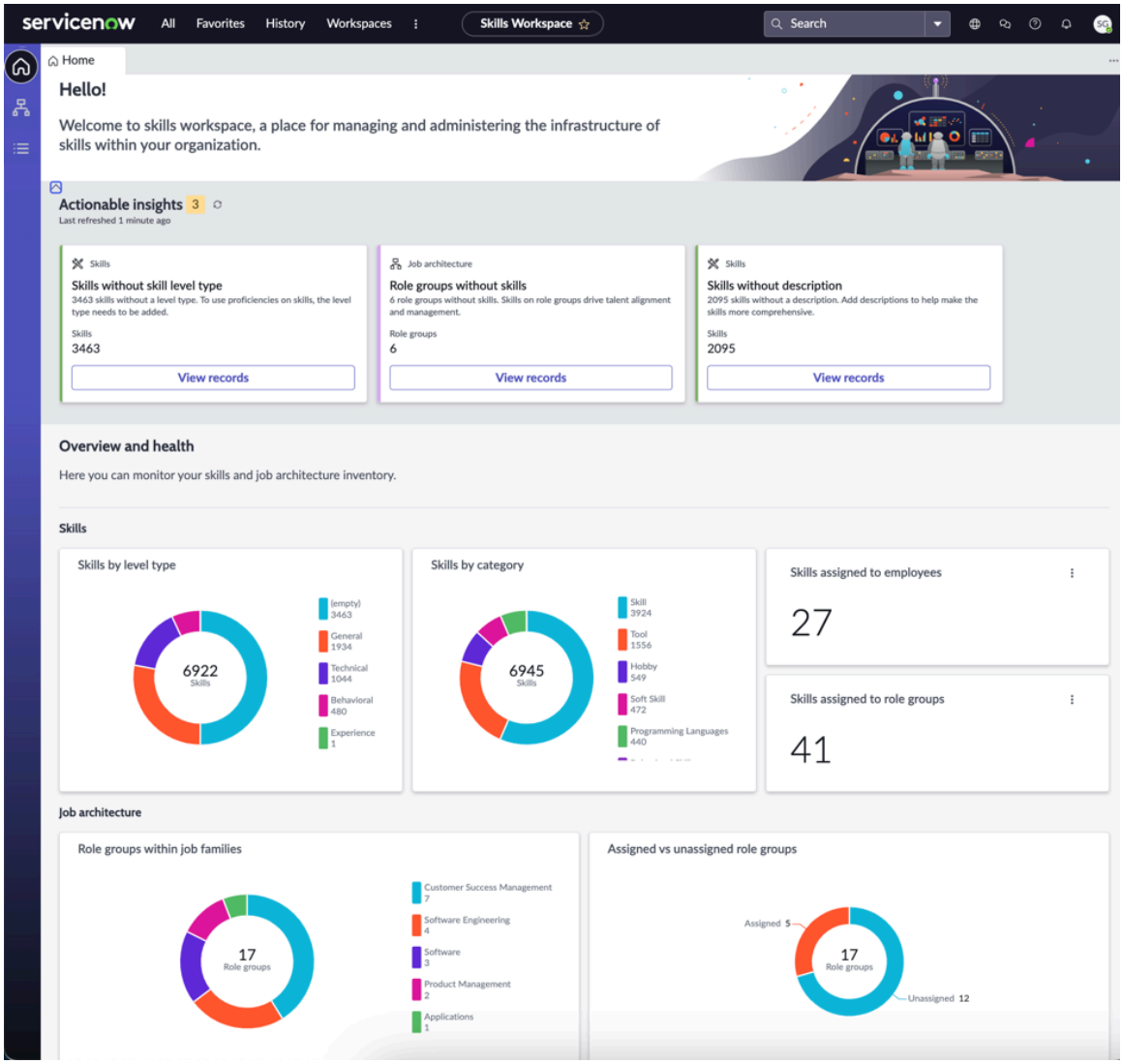

Job architecture view

Get a visual and hierarchical overview of Job architecture data that is loaded and created to get a structural understanding of job families and role groups and skills related to them.

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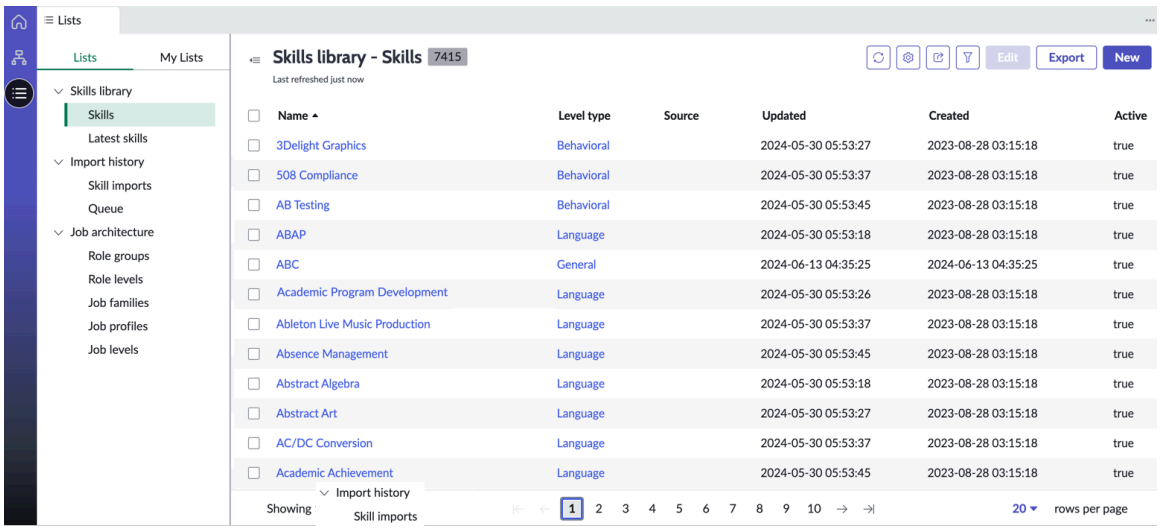
Lists view

Quickly access information about skills library, skills import history, and job architecture data by using the Lists view.



Bring in skills through Skills import

Import the skills specific to your organization into your Skills Foundation application through the Skills Workspace.

Before you begin

Role required: sn_skills_int.admin

https://player.vimeo.com/video/1154476887?h=51e2a09da7&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ( ).

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3. Select **Import history** > **Skill imports**.
   The Skill imports display all the imports at various stages. You can have an import in Draft, In-progress, Completed, or Canceled state. You can only have a single import in draft/ in-progress state at any given point. The current import must be canceled or completed to start another import.
4. Select **Import**.
5. In the Create a new skill import window, Get started section, enter a description for the import in the Import description field.
6. Select **Next**.
7. In the Select a source section, choose how you want to import the skills.

Option	Process
File upload	Access the predefined skills import template so you can import your skills data in the re quired format. For more information, see Im port skills through file upload.
Integration	Select an integration source to import skills data from the external systems. ○ Workday integration For more information, see Workday spoke integration in Skills Foundation. ○ SAP SuccessFactors integration For more information, see SAP SuccessFac tors integration Skills Foundation.
Custom import	Skills from Credly (OOTB source) that are in the Queue (Dynamic skills table) are imported automatically. Shows the number of new skills being imported. **Note:** You can select specific skills and import them directly from the Queue list. For more information, see Dynamic skill import for harmonization.

8. Select **Next**.
9. In the Existing matches section, skills that are identical to the existing skills in the library (cmn_skills table) are identified by AI Search and are not processed again, but are only listed as existing skills.
   You have the following tabs to review the skills:
   - Summary - Overview of skill matches.
   - Existing matches - Skills that have been mapped to the existing skills in the cmn_skills table.
   - Previously mapped - Skills that have been mapped in the previous import.
   - Previously discarded - Skills that have been discarded in the previous import.
10. Select **Continue upload**.

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11. In the Review upload section, review the uploaded skills displayed in various categories.
    - Summary - Overview of the uploaded skills.
    - Errors - Skills with errors. For example, missing description, missing Level type and so on.
    - Incomplete - Skills that don't have data in the required fields.
    - Duplicate in source - Skills that exist more than once in the source file.
    - Ignored from upload
    - All - All the uploaded skills.

    You can edit the incomplete skills, duplicate skills, or skills with errors at this stage and correct them before the actual upload.
12. Select **Upload skills**.

    Note: The skills with errors are not uploaded.

    The upload process takes some time to complete depending on the number of skills imported. For example, uploading a thousand skills takes around five minutes.
13. In the Review skills section, review the uploaded skills.
    The uploaded skills are analyzed by AI Search and are displayed in the following tabs.

    Review uploaded skills

Review skills categories	Description
Summary	Summary of the skills processed.
Needs review	Review the skills manually for normalization and identifying possible duplication. The AI Search calculates match strength by looking at how closely imported skill names align with existing skill. Evaluate the possible matches to mark new skills by selecting **Create as new**, **Accept possible matches** or **Discard**. You can select multiple skills or all skills at a time and perform these action. You can select multiple skills or all skills at a time and perform these actions. If you select a single skill, a pop-up opens where you can select the possible match for duplication.
All	All imported skills are displayed.

    Note: You can go back to the previous section using the **Back** button or restart the entire import with the Restart Playbook option in the menu. This option is available from the third step in the import only after the actual import happened.

    You can cancel the import at any stage by selecting the **Cancel import** button.
14. After all the skills are reviewed in the Needs review list, select **Mark as complete** to complete the import process successfully.

    Note: New skills are added to the skills library (cmn_skills table) only after selecting **Mark as complete** for the import.

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Result

In the **Skills in this import** tab, you can check all the imported skills. All the skills will be read only after marking the import as complete.

Import skills through file upload

Import your industry specific skills data to your Skills Foundation application using a predefined skills import template so you can import your data in the required format.

Before you begin

Role required: sn_skills_int.admin

Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ( ).
3. Select **Import history** > **Queue**.
4. Select **Import**.
   You are redirected to the Playbook experience.
5. Prepare the file to upload.
   a. Select **download a template**.
   b. Open the skills import template(.xlsx file) on your local system.
   c. Enter the skill information in the appropriate columns.

      Note: The fields in the template are **Name**, **Level type**, **Description**, and **Source** (non-required fields).

   d. Save the Excel file.
6. Select **Attach file** to select the file for upload in excel or CSV format.
7. Select your Excel data file.
8. Select **Open**.

   Note: After the file is attached, you'll have the options to download, rename the file, or delete the attached file.

Workday spoke integration in Skills Foundation

Import skills from Workday Learning and Workday HR spoke into your Skills Foundation application using the skills import flow.

Prerequisites for Workday Spoke integration.

- Required plugins - Workday Learning Spoke and Workday HR spoke.
- After the Workday HR spoke plugin is installed and configured, set the following properties:
  - sn_skills_int.workday_hr_report_owner: The workday username of the report owner.
  - sn_skills_int.workday_hr_look_up_skills_report: The "All skills" report.
  - sn_skills_int.workday_hr_look_up_employee_skills_report: The "User skills" report.

The integration options available are:

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- Workday - All: Imports all skills found in Workday. If you want to import only a subset of skills, modify the report used for the import. This option is available when any one of the Workday Learning Spoke or Workday HR Spoke plugins is installed.
- Workday - Course skills: Imports course-related skills depending on the learning courses that you have in Workday. This option is available when the Workday Learning Spoke plugin is installed.
- Workday - User skills: Imports all skills employees have in their Workday profiles. This option is available when the Workday HR Spoke plugin is installed.

  Internally, the user skills are imported in the following steps:

  1. Skills (general definitions) are imported. This step is similar to the Workday - All import.
  2. Skills are added to employee profiles.

     Note: To add user skills to the employee profiles, make sure the sys_user.employee_number values match with the workdays employee numbers.

  3. Skill levels are imported. The following defaults are taken for the skill levels:
     - Minimum level: 1
     - Maximum level: 5
     - Skill Level Type for newly created skills: General

     However, these defaults can be changed by modifying the import flow.

Note: To import Skill levels, Skills Cloud must be enabled in Workday.

SAP SuccessFactors integration Skills Foundation

Import skills (skill data and user-specific skill data) from SAP SuccessFactors into your Skills Foundation application using the skills import flow to maintain data consistency.

Prerequisites for SAP SuccessFactors integration.

- Upgrade to SAP SuccessFactors Spoke(sn_successfactors) plugin v 4.6.1-7 or later.
- You must have Human Resources Scoped App: Core (com.sn_hr_core) plugin on Australia family release.
- For earlier releases, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request. Approve the RCA and re-import the skills manually. You can also manually create the required RCA to avoid re-work prior to skills import.
- After the SAP SuccessFactors plugin is installed and configured, set the following properties:
  - sn_skills_int.default_skill_level_type: The sys_id of a skill level type has unique number in the Value field. In case the Value field has an invalid number, an error message is displayed saying that the user has to restart the flow after providing the correct value.
  - sn_skills_int.allow_import_to_override_skill_level: This system property when set to True will override the proficiency of the existing skills of an employee. The highest proficiency whether it's from the import or the existing proficiency value will be retained.

    If the system property is False, there is will be no change in the proficiency values, but if a skill is validated for an employee, the same will be reflected in employee profile after the import.

The integration options available are:

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- SuccessFactors - All: Imports all the skills from SuccessFactors.
- SuccessFactors - User skills: Imports all the skills from the user profiles SuccessFactors. After the import and harmonization is complete, the skills are added to the respective employee profiles and also validated by the manager.

Dynamic skill import for harmonization

Import, review, and harmonize the new skills brought in from third-party sources (currently only through Credly) into the skills library (cmn_skills table).

Before you begin

Role required: sn_skills_int.admin

Let's see how dynamic skills are processed in the context of Credly:

- Skills associated with the Credly badges are analyzed.
- Skills are validated to check if they don't already exist in the skills library and also not mapped to an existing skill.
- New skills are pushed to the queue pipeline for harmonization.

For example, an employee Abel Tuter receives a badge which has three skills - Java, Python, and J2EE. The system checks the skills library (cmn_skills table) to determine the skills that already exist. Java and J2EE are already present in the system, so they are immediately added to the Abel Tuter's employee profile. Python skill is not available in the system, so it's moved to the queue for skill harmonization. Once the admin reviews and harmonizes the Python skill, it's also added to the skills library and Abel Tuter's employee profile.

Working of skill mapping - Skill mapping is the process of linking a skill, either imported or from a badge to an existing skill in the skill library. The mapping can be done automatically or manually, to avoid duplicates.

- System Mapping (Automatic): If a new skill, for example, Java 1.8 is similar to the existing skill, for example, Java in the cmn_skills table, the system detects it as a duplicate and maps it automatically.
- Admin Mapping (Manual): An administrator can manually map a skill. For instance, if Python is imported, the admin might map it to Jupyter Notebook depending on the relevance.

Important behavior - When a skill is mapped, a new entry is not created for the imported skill. Instead, the existing skill is used in the employee profile. For example, if Java 1.8 is mapped to Java, and Python is mapped to Jupyter Notebook, only Java and Jupyter Notebook appear in the employee profile, not Java 1.8 and Python.

Note: You can also customize your skill data and use it as a source by calling specific APIs.

Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ().
3. Select **Import history** > **Queue**.
4. Select one or more records for the import.

Note: Use **Select all** option to bulk import the skills. Alternatively, use the Custom import option in the Skill import playbook to import all the skills in the dynamic queue. For more information, see Bring in skills through Skills import.

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5. **Optional:** Select the **Edit** option to update missing data in the Description, Skill import tracker, Level type, and Source fields.
6. **Optional:** Select **Update**.
7. Select **Import**.
   You are redirected to the Playbook experience and the custom import option is selected automatically.
8. Select **Next**.
   Follow the next steps to complete the import. For more information, see Bring in skills through Skills import.

Result

The harmonized new skills are added to the skills library (cmn_skills table) and updated in the credentials badge skills metadata. For more information, see Achievements and Credentials in Talent Development Core.

Working with job architecture

Create, update or modify skills and job architecture data from a single location in the Skills Workspace.

Creating a new role group through the Skills Workspace

Add a new role group in the Skills Workspace to create a category of roles in your organization.

About this task

After each step, select **Save and continue** to move to the next step.

Before you begin

Role required: sn_skills_int.job_arch_admin

Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ().
3. Go to **Job architecture** > **Role groups**.
4. Select **New**.
5. Either create your role group manually or by copying data from an existing group.

Method	Actions
Manually	**a.** Select **New**. **b.** Enter the details for the role group: the **Name**, **Description**, and **Job family**. **c.** Select **Save and continue**.
Copy the data from an existing role group	**a.** Select **From an existing role group**. **b.** Select the role group from the **Select role group** pop-up list. **c.** Enter the details for the role group: the **Name**, **Description**, and **Job family**. **d.** Select **Save and continue**.

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6. For the Add Role levels page, provide a job profile name, title, and job level for each role level in the role group

   Role levels enable you to create a hierarchical structure to classify roles based on skills and proficiencies in your organization.

7. **Optional:** Add more levels by selecting **Add level**.
8. Add relevant skills for the roles within this group.
   Skills ensure alignment between required and desirable capabilities.
   a. Select a skill name from the **Skill** drop-down list.
   b. Determine the skill relevance by selecting **High**, **Medium**, or **Low** from the **Skill relevance** drop-down list.
   c. If the skill is required, select the **Required** check box.
   d. **Optional:** To add more skills, select **Add skills** and provide details about the skill.
9. Add related role groups to enhance career progression and provide employee aspiration suggestions for this role group.

   a. Select a role group in the **Role group** field.

   b. Determine the type of relationship between the role groups by selecting a value in the **Relationship type** field.
      - Bidirectional (between role groups)
      - Unidirectional (from newly created role group)
      - Unidirectional (to newly created role group)

   c. **Optional:** Add more role groups either by selecting the role group directly or from suggested role groups.
      - To add a role group directly, select **Add group** and provide details about the role group.
      - To add a role group from suggestions, select the Recommendations icon ( ) and select **Add** on the role group.

10. Select **Submit**.

Note: A new role group is created with all the data.

Result

The new role group is opened in form view starting with the Skills matrix. You can see all the skills and role levels related to the role group. You can add more skills to the role group after it is created if necessary. For more information, see Add more skills to a role group.

Add more skills to a role group

Add new skills at each role level in a role group that were not added when creating the role group using the Skills Matrix in the Skills Workspace.

Before you begin

Role required: sn_skills_int.job_arch_admin

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Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ().
3. Go to **Job architecture** > **Role groups**.
4. Select a role group for which you want to add new skills.
5. Select the **Skills Matrix** tab.
6. Select **Add skills**.
7. In the Add skills pop-up window, select the skill in the **Skill** field.
8. Select the suitability level of the skill by selecting **High**, **Medium**, or **Low** in the **Skill relevance** field.
9. If the skill is required for this role level, select the **Required** check box.
10. **Optional:** Add more skills by selecting **Add skill** and providing the skill information.
11. Select **Add**.
12. Select **Save**.

Edit skills and proficiencies in the Skills Matrix

Edit skills data and their proficiency levels to manage the progression at each role level in a role group using the Skills Matrix in the Skills Workspace.

Before you begin

Role required: sn_skills_int.admin

Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ().
3. Go to **Job architecture** > **Role groups**.
4. Select a role group for which you want to edit the skills data.
5. Select the**Skills Matrix** tab.
6. Select the check box next to the skills to be edited.
7. Select the **Edit** button.
8. **Optional:** Insert proficiency levels for the skill from the Skills [cmn_skills] table by selecting **Autofill proficiency levels**.
   - To update only missing proficiency levels, select **Update only empty fields**
   - To update all proficiency levels and overwrite any existing information, select **Update and replace all the existing fields**
9. **Optional:** Modify the mandatory or optional setting of a skill by selecting **Update required status** and selecting the appropriate value.
10. **Optional:** Remove the selected skill or skills by selecting **Remove skills**.
11. Select **Save**.

Create related role groups

Create a connection between two different role groups in the Skills Workspace to enable a transition path for the employees to move across different role groups.

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Before you begin

Creating a related role group record creates a configuration for the progression from one job level to another job level across the role groups. This configuration is used by Talent Development to help employees choose their career progression. For example, Front-end engineering and Back-end engineering are two different role groups. By creating a bilateral relation between these two role groups, an Associate front-end Engineer (IC1) can move to an Associate back-end Engineer (IC1) role and vice-versa.

Role required: sn_skills_int.job_arch_admin

Procedure

1. Navigate to **All** > **Skills Workspace**.
2. Select the Lists icon ().
3. Go to **Job architecture** > **Role groups**.
4. Select a role group to open it.
5. Select the **Related Role Groups** tab.
6. Either create your related role group manually or by selecting from the recommendations.

Method	Actions
Add from recommendations	**a.** Select the Recommendations icon () on the sidebar. **b.** Select **Link** on the role group. The linked role group and the value in the **From role group** field will create a related role group. After linking, the role groups are not dis played in the recommendations list. **Note:** The recommendation panel is only displayed if data is available in the sn_skills_int_role_level_m2m_in d_title table.
Manually	**a.** Select **New**. **b.** Select the role group to associate with the parent role group in the **To role group** field. The default value of the **From role group** field is the selected role group.

7. If you want to associate job levels to the selected role groups, select them in the **From Job Level** and **To Job Level** fields.
   The field values are populated from the job levels defined in the Job levels [sn_skills_int_job_level] table.

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Note: If you don't select a value in the **From job level** and **To job level** fields, the initial job levels of the role group (as defined in Job levels under Job architecture) are considered automatically.

8. Select **Save**.

Result
A new relation between two role groups is created.

Career tab in Employee Center

View update, and manage all aspects of your career using the **Career** tab in Employee Center.

Role required: sn_skills_int.emp

The **Career** tab contains various widgets to manage your work data like, experience, aspirations, and skills in your profile.

Note: The **Career** tab and the widgets are activated with the installation of the Skills Foundation application driven by the sn_skills_int.enable_skills property. For more information, see Add the Career tab and enable the Skills widget in the Employee Profile.

Role details

View your business title, role group and your role specialty that accurately reflect your position in the organization and enable you to get personalized skill recommendations.

Note:

- The Business title is derived from the Employee position table (sn_employee_position) where the primary role is marked as true because an employee can have multiple job profiles.
- The Employee position table updates whenever the HR profile table (sn_skills_int_job_profile) is updated.
- A scheduled job synchronizes the HR jobs table (sn_hr_core.job) and HR profiles table, ensuring accurate data during integration.
- The Job code in the Job profile table (sn_skills_int_job_profile) and HR jobs table (sn_hr_core.job) should match for the Role specialty to be populated.

Shared aspirations

View objectives that enable you to excel in your career and also promote growth in your organization. Aspirations can be based on your interest, skill, or role. For more information on aspirations, see Create a Talent Development Aspiration.

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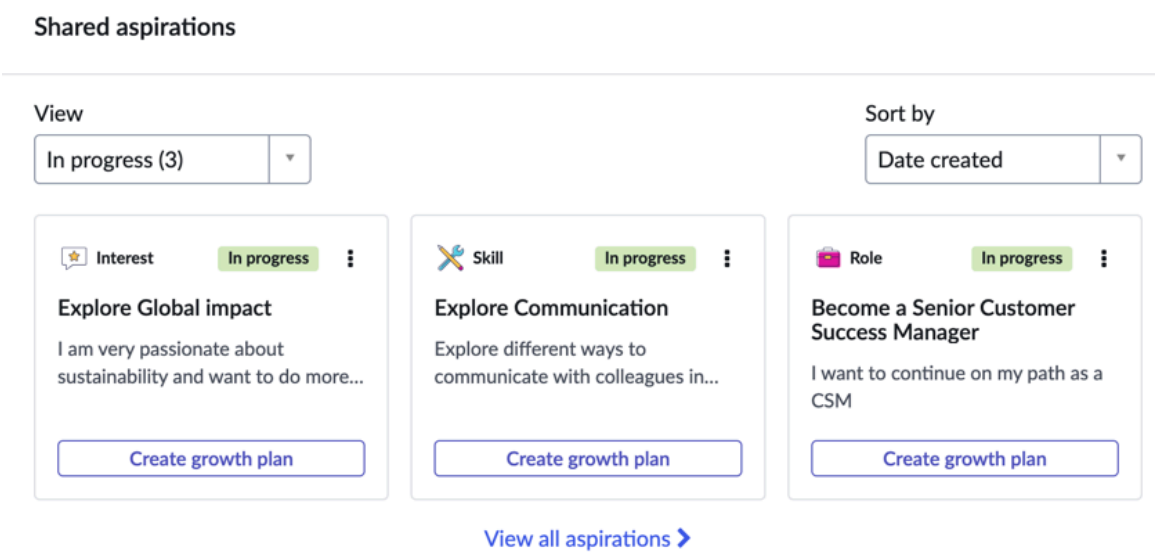
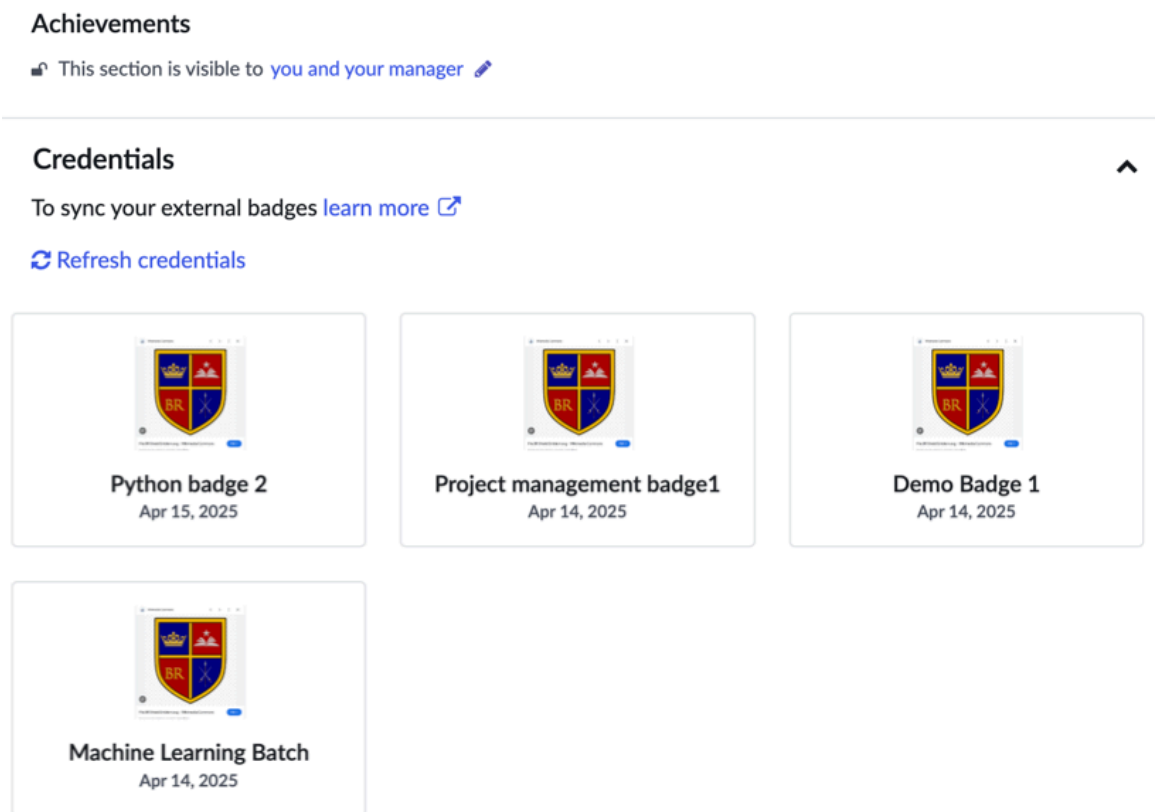


Achievements

Import and view your accomplishments as credentials from Credly by syncing the badges into your organization's Credly account.



Upload Resume/LinkedIn Profile

Get your existing skill set quickly by uploading your resume or LinkedIn profile to your Employee Profile using the **Upload resume or LinkedIn profile** button. For more information on the import process, see Import skills from your resume or LinkedIn profile.

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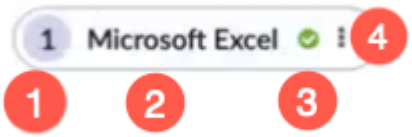
Skills

Manage your skills data by adding skills, removing skills, adding skills via a role level, and updating the proficiencies of the skills. Use the skills profile to understand your skill gaps and learn new skills to stay relevant to your role in your organization. A skill in your profile is displayed as an individual UI component called Skill pill.



Skill pill elements

UI elements	Description
1	A numerical indication of your proficiency level in that skill.
2	Skill name.
3	A green tick on the skill signifies validation by your manager, indicating their approval of your proficiency in that skill. After a skill is validated, you can only increase the proficiency level of the skill, you can't decrease the proficiency level or delete the skill from the profile. For more information on how to validate a skill, see Validate skills in Manager Hub.
4	Menu to access proficiency level or delete options. The skill proficiency level indicates your level of competency in that skill. To learn how to change a skill proficiency level, see Update your skill proficiency level.

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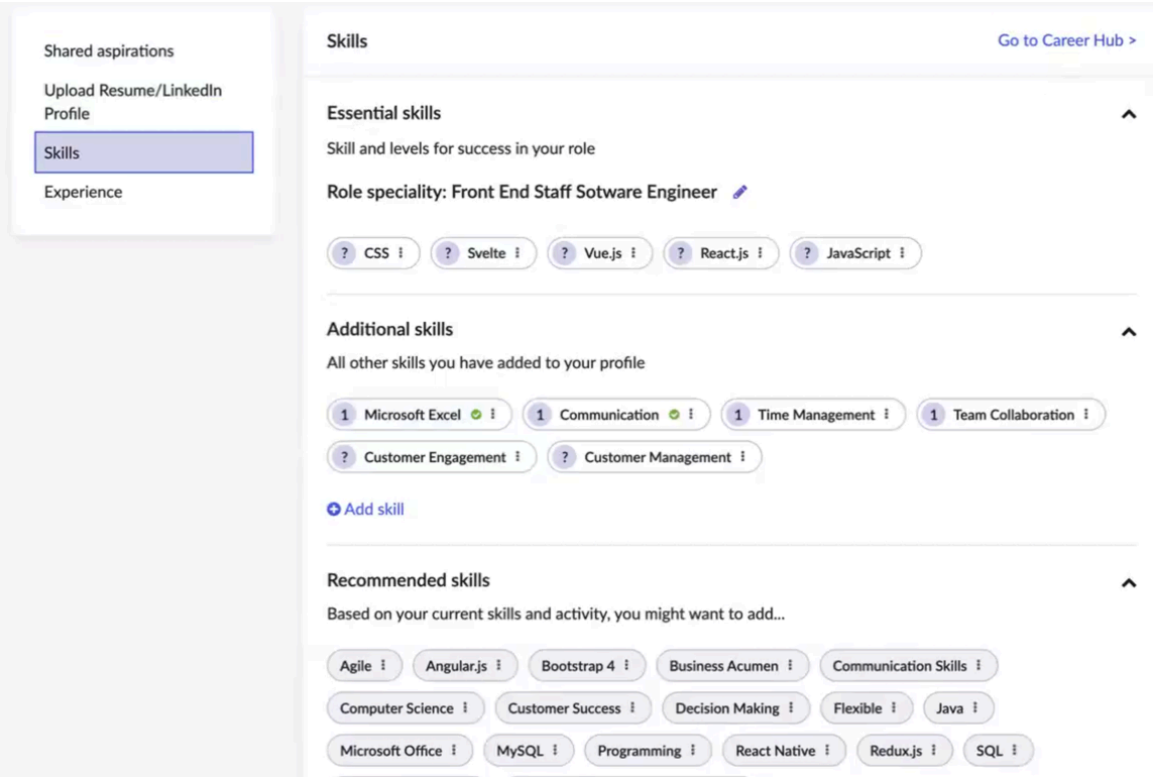
There are three sections within the skills widget. All the skills within these sections are sorted by the highest (required) to the lowest (recommended) skill rating.



Essential skills

This section displays the skills that are derived from your associated role group based on your current position. You can use the essential skills section to determine the skills required for the role and see the recommended learning opportunities to bridge the skill gaps. You can also focus on excelling in the skills and pursue growth opportunities. For more information, see Selecting a Role specialty.

Additional skills

Skills in your profile that are not part of your role level are displayed in the additional skills section. The skills that have been derived from your resume or added manually using the **Add skill** option are also part of the additional skills. For more information, see Add skills by using the skill recommender.

Recommended skills

The Recommended skills section displays the additional skills that are related to your profile. These details are based on your role and existing profile.

Experience

Displays the experience journey in your organization with the roles that you have taken up and the duration in each role along with the starting and ending months.

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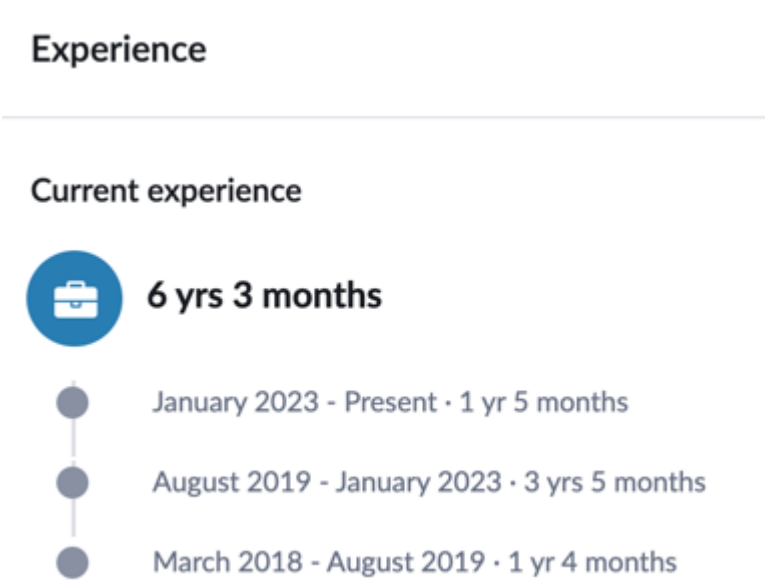

Selecting a Role specialty

Update your skills profile by selecting a role level as your role specialty to get personalize skill recommendations based on your job family and job profile.

Before you begin
Role required: sn_skills_int.emp

Procedure

1. Navigate to **All** > *Employee Center*.
2. In the *Employee Center*, navigate to > **Profile** > **Career** tab.
3. Select the **Role details** widget.
4. In the Role specialty field, select the **Select my role specialty** button.

> **Note:** Usually your role level is displayed as your role specialty.

5. To change the role specialty, select the pencil the ( ) icon.
6. In the Select your role specialty pop-up, select your role level.
7. Select **Save**.

Result
The skills related your role specialty are displayed under Essential skills section in the Skills widget. You can change the proficiency of the skills according to your expertise level. For more information, see Update your skill proficiency level.

Note:

- You can't delete a role specialty, only add or change it. If you change the role specialty, the skills in your profile are changed based on the selected role level. If you have a skill that is validated, or if you have updated its proficiency, then that skill is moved to the Additional skills section. If the skills are not validated or if the proficiency is unchanged, then that skill is removed.
- If you don't see any suggestions for the role specialty, contact your admin to configure the job architecture data by creating a role profile that matches your job family and skills. For more information, see Adding a job profile to the employee.

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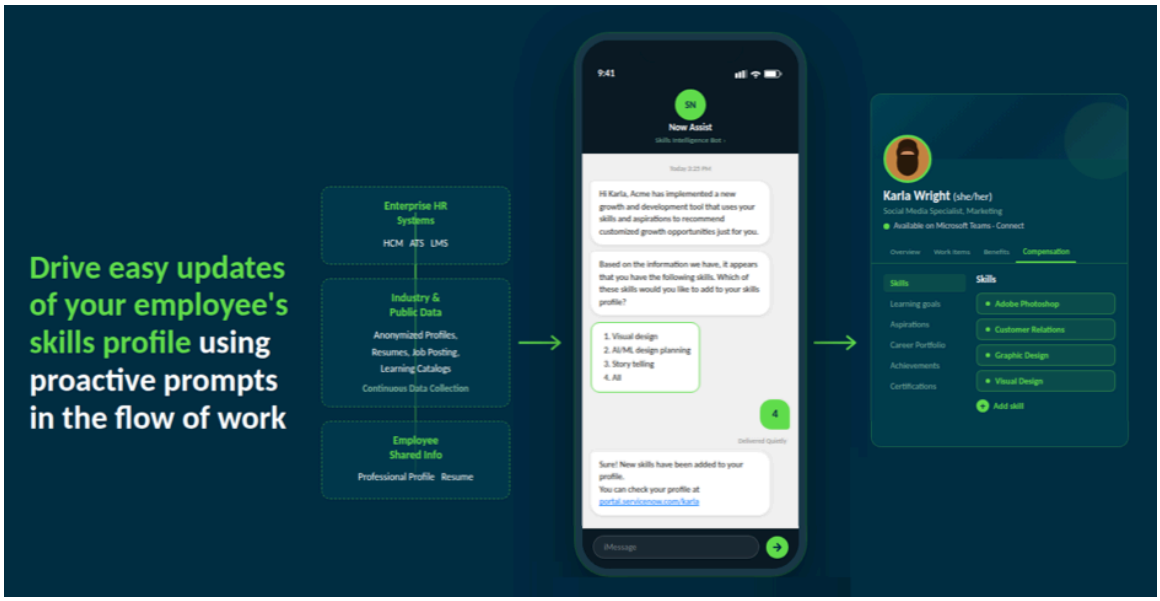
Solve the challenge of adoption with Proactive Prompts

With Proactive Prompts for the Skills Foundation application, your managers and employees can proactively bring actionable insights as prompts into their flow of work.

Proactive Prompts for Skills Foundation

One of the biggest challenges that an organization faces is getting their employees to update their skills profiles. With the Proactive Prompts for Skills Foundation application, you can solve this challenge easily because you can use the prompts in multiple engagement channels, such as Microsoft Teams, Microsoft Outlook, Zoom, and the short messaging service (SMS).



In the example, the employee receives a prompt to update the suggestions that the Skills Foundation application detected. The prompt sent to the employee clearly communicates the information. The employee just has to select a button to add the suggested skills to their skills profile.

With this feature, the managers in your organization don't have to follow up or encourage their employees to take action at the right time. Skills recommendations can help your employees keep their skills profiles up to date without constant reminders from their managers. For more information, see Proactive Prompts for Skills Foundation.

Pre-seeding employee skills

The Skills Foundation application can automatically detect skill gaps and prompt the employee to add pre-seeded, or necessary, skills to their profiles. This way, the employee profile is always kept up to date.

About pre-seeding

Pre-seeding refers to the automated inclusion of essential skills that are required for a specific role without the need for employees to manually list them. The Skills Foundation application uses natural language processing (NLP) techniques to extract and categorize these skills from resumes or LinkedIn profiles. These necessary skills are automatically detected by the system and are notified to the employee when they’re onboarded with the help of Proactive Prompts.

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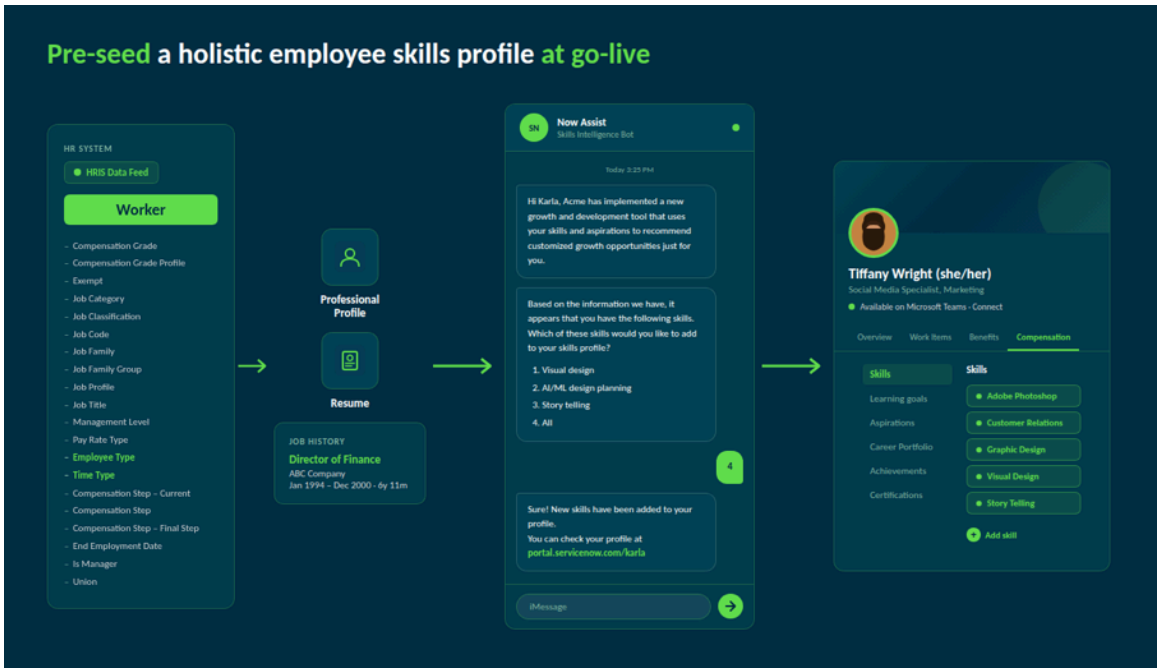
How pre-seeding works

The application is constantly analyzing anonymous profiles or resumes with selected job portals. It extracts the skills and tracks what titles people use in their resumes. The application can also extract more information to provide customizable solutions that are unique to your requirements.

The application matches the information that is provided by the employee in the form of resumes or LinkedIn profiles. By using AI models, the application analyzes this information and detects that this employee should have certain foundational skills that seem to be missing in their profile. This prompt with the pre-seeded skills helps your employees to update their skills.

The following example shows how an employee receives a prompt with pre-seeded skills.



In the example, the employee received a notification that is based on what the application knows about that employee. The application notices that there's a skill gap in their profile and then prompts the employee to add the needed information to the profile to remove the skill gap.

Proactive Prompts for Skills Foundation

Recommend roles, skills, and missing proficiencies to the employees and get approval from managers in their flow of work using Proactive Prompts.

Make sure that the signals are configured and scheduled to deliver the prompts. Prompts are displayed in Employee Portal and Virtual Agent.

Prompts to Managers and Employees

Prompts	Description
Employee Role Selection Prompt to Managers	Signal configuration to trigger prompts for employees to associate a primary role to their employee profile.
Skills Update Reminder Prompt to Managers	Signal configuration to trigger prompt for managers that their employees didn't update their skills for a long time and reminding them to update those.

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Prompts to Managers and Employees (continued)

Prompts	Description
Employee Role Selection Prompt to Employees	Signal configuration to trigger prompt for employees to associate skills to the primary role in their profile.
Employee Skill Selection Prompt to Employees	Signal configuration to trigger prompt for employees to add appropriate skills to their profile.
Skill Proficiency Update Prompt to Employees	Signal configuration to trigger prompt for employees to update the proficiency for the skills in their profile.
Skills Update Reminder Prompt to Employees	Signal configuration to trigger prompt for employees to either add new skills or update proficiencies for the existing skills.
Review Skills Profile Prompt to Employees	Signal configuration to trigger prompt for employee to update their profile based on the recent activities.

Configuring Skills Foundation

As an admin, add skills and import data into job architecture tables in your ServiceNow instance to start using Skills Foundation in your organization.

Plugin dependencies

- Skills Management (com.snc.skills_management)
- Data Services Base Client (com.glide.data_services.base)
- Skills Library Data for Skills Management (com.snc.skills_management.seed_data)

App dependencies

Employee profile (sn_employee) version 8.0.2.

Other requirements

- To access multi-channel prompts, you must have Proactive Prompts (com.sn_pp) version 2.0.0 installed.
- Employee profiles must exist. For more information, see Employee profile.

Setup process

The following procedure describes the steps to install Skills Foundation, upload or create the required data, and start using Skills Foundation in your organization.

Note: A successful Skills Foundation installation requires the Skills Workspace plugin, use the Guided setup to install and configure the Skills Foundation application instead of a manual process.

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1. Install the Skills Foundation [com.sn_skills_int] plugin.
2. Install the Skills Library Data for Skills Management (com.snc.skills_management.seed_data) plugin.
3. (Optional) Install the Proactive Prompts plugin, which provides access to multi-channel prompts. For more information, see Install Proactive Prompts.
4. Load customer industry skills data. For more information, see Load your custom skills into Skills Foundation.
5. Upload job architecture data. For more information, see About Job Architecture.
6. (Optional) Create a job level progression from a job level to a higher job level to indicate the growth path for employees in your organization. For more information, see Creating a job level progression.

   Note: Although this step is optional, creating job level progressions enables you to obtain skill-based suggestions for employee career progression as part of employee growth and development. For more information, see Talent Development Core.

7. (Optional) Create a configuration that sets the proficiency automatically for skills across role levels based on the skill level type and role group. For more information, see Set the job proficiency level automatically.
8. (Optional) Create role groups and role levels based on the type of roles in your organization. For more information, see Adding role groups and role levels for skills administration.
9. Create role-level mapping to industry titles. For more information, see Map industry titles to role levels.
10. Assign a role level to an employee using Proactive Prompts or manually. For more information, see Map a role level to the employee profile.
11. Assign users to roles to enable them to perform tasks in Skills Foundation. For more information, see Components installed with Skills Foundation.
12. Provide access to the Skills widget where employees can view and edit skills in their profile in Employee Portal by setting the *sn_skills_int.enable_skills* system property to True.

Skills Foundation guided setup

Install and set up Skills Foundation and Company Job Architecture confidently with step-by-step instructions using guided setup.

Before you begin

Role required: sn_skills_int.admin

The advantages of using the guided setup for Skills Foundation are:

- A single interface enables you to access in one place all the information necessary for installation like data loading and creating roles.
- Provides guidance for planning the roll-out of the application and performing the basic configuration.
- Configuration activities are organized into categories for more efficient access.
- Enables you to track your implementation progress.

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Procedure

1. Navigate to **All** > *Skills Foundation* > **Guided Setup**.
2. On the welcome page, select **Continue**.
3. Read through the checklist and keep the files handy.
   - Prepare the Job Architecture Data for the installation.
   - Prepare the list of custom skills specific to your organization.
   - Prepare employee mappings with Job Architecture Data from your organization.
4. Select **Get started**.
5. Expand any category to view detailed status and related tasks.
   - Select **Start** button on each setup category to start the configuration.
   - Select **Mark as complete** after you finish a category.
   - Select **Skip** to leave out a category.
   - Select **Back** to go back to the previous category.

Skills Foundation Guided Setup

Category	Description
Skills Foundation Onboarding	Learn about the concepts and working of Skills Foundation through product documentation. Related task - Product Documentation.
Set up Relevant Plugin(s)	Install the optional plugins that enhance the Skills Foundation experience. Related tasks: ○ Skills Workspace plugin. ○ Proactive Prompts plugin.
Set up Access Roles	Assign roles to employees in your organization to ensure appropriate access in Skills Foundation. Related task - Assign Access Roles to users.
Skills Management	Upload your skills data into your ServiceNow instance. These skills are the basis for all the activities in your Skills Foundation application. Related task - Onboard Custom Skills. For more information, see Load your custom skills into Skills Foundation.
Company Job Architecture	Upload your existing company job architecture data, set the growth path using job level progressions, and automatically assign the proficiency for each skill across role levels, providing a structure to the imported data.

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Category	Description
	Related tasks: ○ Upload Company Job Architecture. For more information, see Load job architecture data into your ServiceNow instance. ○ Create Job Level Progressions. For more information, see Creating a job level progression. ○ Create Proficiency Autofill Configurations. For more information, see Set the job proficiency level automatically.
Employee Profile Upload and Setup	Upload the employee data and set up the roles and profiles required in your organization to associate jobs to the employees based on roles and skills. This category is crucial in making the employee and job data connection. Related tasks - Upload Employee Data - Uploading an excel sheet with employee data or manually map job profile with the employee. For more information, see Adding a job profile to the employee. **Note:** ○ If the Human Resources Scoped App (sn_hr_core) is installed, all setup steps like uploading employee data, adding profiles, and assigning roles are completed automatically. ○ You must have Human Resources Scoped App: Core (sn_hr_core) plugin on Australia family release. For earlier releases, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request. Approve the RCA and re-import the skills manually. You can also manually create the required RCA to avoid re-work prior to skills import.
Configure System Properties	Control various Skills Foundation features using these system properties. Related task - Enable Skills Foundation for Employee Growth and Development.

6. Select **Complete** after you have finished all the tasks within all categories.

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Install Skills Foundation

You can install the Skills Foundation application (com.sn_skills_int) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Skills Intelligence application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: sn_skills_int.admin

About this task

The following items are installed with Skills Foundation:

- Roles
- Tables

For more information, see Components installed with Skills Foundation.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Skills Foundation application (com.sn_skills_int) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Load your custom skills into Skills Foundation

Upload the skills specific to your organization or human capital management practices in your ServiceNow instance.

Before you begin

For information about the format to add and upload the custom skills in your organization, see Custom Skills Sample Data.

Role required: import_admin, sn_skills_int.admin

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Procedure

1. Navigate to **All** > **System Import Sets** > **Load data**.
2. In the **Import set table** field, select **Existing table**.
3. Select the Skills Staging [sn_skills_int_skills_staging] table from the drop-down list.

   Note: If no values appear in the table for the level types and proficiencies for a skill, the skill will be created without this information. For more information, see Define a skill level type.

4. In the **Source of the import** field, select **File**.
5. Select the source of the CSV file by selecting **Choose File**.
6. Select **Submit**.
7. Transform the data from the staging table format to the job architecture table format by selecting **Run transform**.
8. Select **Transform**.

Result

The custom skills are added to the existing skills in the Skills [cmn_skills] table.

About Job Architecture

Company job architecture data enables you to optimize career growth and development of employees by identifying required, recommended, and additional skills for employee roles.

Assess the skills of the employee and suggest learning to acquire new skills, promoting talent management via Manager Hub or through Skills profile in Employee Portal. For more information, see Career tab in Employee Center.

Prepare company job architecture data from any HCM (human capital management) platform in CSV format and import it to your ServiceNow® instance. After transformation, the data is transferred to the relevant tables like Job Family, Role Group, and Job Profiles. For more information on the transformation process, see Load job architecture data into your ServiceNow instance.

Note: You must import your company job architecture data before being able to onboard employee job profiles in your ServiceNow instance.

From the Company Job Architecture Staging [sn_skills_int_company_job_arch_staging] table, the data is populated into the following tables:

- Job Family [sn_skills_int_job_family] table: Groups similar jobs. For example, Software Engineering, Application Development, Finance and Purchasing, Human Resources, and so on.
- Job Profiles [sn_skills_int_job_profile] table: Provides an information record about a job that includes a summary and description. For example, Sr. Software Engineer, Project Manager, and so on.
- Job Levels [sn_skills_int_job_level] table: The level of the job profile. For example, IC1, and IC2.
- Role Groups [sn_skills_int_role_group] table: Includes roles with a similar set of skills. For example, Front-end, Back-end, Full-stack, and so on.
- Role Levels [sn_skills_int_role_level] table: The designation of the role in a role group, with the name indicating its level (IC1, IC2). For example, Associate Software Engineer - Backend – IC1 – JavaScript L1.

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- Role Group Skills [sn_skills_int_role_group_skill] table: The mapping of role groups and their skills.
- Role Level Skills [sn_skills_int_role_level_skill] table: The mapping of role level and skills with the level of proficiencies for the role level.

For more information about the tables in the Skills Foundation application, see Components installed with Skills Foundation.

Note:

You can also add data specific to your organization to these tables manually.

After the data is imported, connect the job architecture data to the employee profile. You can do this in two ways:

- Using a scheduled job. For more information, see Map a role level to the employee profile.
- Adding a job profile to an employee manually. For more information, see Adding a job profile to the employee.

Load job architecture data into your ServiceNow instance

Load your existing company job architecture data to build a customized career architecture in your ServiceNow instance.

Before you begin

Role required: import_admin, sn_skills_int.job_arch_admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load data**.
2. In the **Import set table** field, select **Existing table**.
3. Select the Company Job Architecture Staging [sn_skills_int_company_job_arch_staging] table from the drop-down.
4. In the **Source of the import** field, select **File**.
5. Select **Choose File** and select the source CSV file.
6. Select **Submit**.
   The data is imported into the job architecture staging table.
7. **Optional:** Validate the imported data.

   a. Select the Loaded data related list.
   The newly imported data in the staging table is displayed.

   b. Select the **Validate latest import set** related link.
   A report is generated with a bar graph showing the insights about missing data in the staging table. The possible errors are:
   - Empty job code and job title
   - Empty job family and role group
   - Skill missing
   - Skill inactive

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- Skill level type missing
- Proficiency mismatch

c. Select the bars on the graph to go the staging table and act on any missing data.

8. Select **Run transform** to transform the data from the staging table to the Job architecture tables.
   The selected import set is displayed.
9. Select **Transform**.
   After transformation, the message `Transformation completed` is displayed. The extracted and transformed data is loaded into the respective tables: Job family, Job profile, Role group, and Role level.

Creating a job level progression

Create a progression from one job level to another to identify the growth path in your organization.

Before you begin

Role required: sn_skills_int.job_arch_admin, sn_skills_int.job_arch_editor

Procedure

1. Navigate to **All** > **Job Architecture** > **Job Families**.
2. Select **Job Level Progression**.
3. Select **New**.
4. Set the beginning and end of the job level progression.

> ⚠ **Warning:** Make sure not to create more than one vertical progression from the same starting job level. For example, if an X to Y vertical progression exists, then an X to Z vertical progression is not allowed. Similarly, don't create more than one vertical progression to the same target job level. For example, if an X to Z progression exists, then a Y to Z progression is not allowed.

a. Set the beginning of the job level progression by selecting a job level in the **From job level** field.

b. Set the end of the job level progression by selecting a job level in the **To job level** field.

> ℹ **Note:** A job level progression for the same level is also possible, for example, IC1 to IC1 where both IC1s belong to different role groups.

5. Mark the direction of the progression in the **Type** field.
   - **Vertical** - The progression for an employee is within the same role group
   - **Lateral** - The progression for an employee is either within the same role group or related role groups (sn_skills_int_related_role_group).
6. Select **Submit**.

Result

A job level progression record is created.

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Set the job proficiency level automatically

Set the proficiency level automatically for the skills across jobs based on the skill level type and role group.

Before you begin

The job level progression must have been defined. For more information, see Creating a job level progression.

Role required: sn_skills_int.admin

About this task

Note: If no configuration is created for the proficiency level, the default configuration is applied to all the progressions.

Procedure

1. Navigate to **All** > **Job Architecture** > **Role Groups**.
2. Select **Proficiency Autofill Configuration**.
3. Select **New**.
4. On the Proficiency autofill form, fill in the fields.
   For a description of the field values, see Proficiency level autofill configuration form.
5. Select **Submit**.

What to do next

Run the scheduled job **Role level skill proficiency autofill** to populate the proficiencies automatically.

Adding role groups and role levels for skills administration

Create additional role groups and role levels based on the various roles in your organization and create a comprehensive role-based structure to accommodate various employee roles in your organization.

About this task

You can add role groups and role levels by importing them through the job architecture data import. For more information, see Load job architecture data into your ServiceNow instance.

This procedure describes how to add role groups and role levels to the Role Groups [sn_skills_int_role_group] and Role Levels [sn_skills_int_role_level] tables manually after the job architecture data is imported.

Before you begin

Role required: sn_skills_int.job_arch_admin

Procedure

1. Navigate to **All** > **Job Architecture** > **Role Groups**.
2. Create a role group.
   a. Select **New**.
   b. Enter a name and description for the role group.
   c. In the **Job family** field, select a relevant job family for the role group.

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d. **Optional:** Indicate that this role group is an addition to the existing role group by selecting **Is supplemental**.

e. Select **Submit**.

3. Create new role levels for the role group.

a. Select the newly created role group.

b. Select the **Role Levels** tab.

c. Select **New**.

d. Enter a title and description for the role level.

e. The **Role group** field is already preselected with the newly created role group.

> **Note:** You can also choose a different role group for the role level. When changing the role group of the existing role level, the skills that belong to the previous role group will be removed. However, any skills explicitly added to the role level will be retained.

f. **Optional:** Select a **Job profile** the role level should belong to.

g. **Optional:** Make the role level active by selecting **Active**.

h. Select **Submit**.

4. Add skills to the role groups and role levels.

> **Note:**
>
> - If a skill is marked as required at the role group level, the setting will be applied to that skill in all the role levels of that role group. You cannot edit the field on the role level.
> - The setting for a skill relevance as High, Medium, or Low at the role group level will also be applied to that skill in all the role levels of that role group. You cannot change the relevance on the role level.
> - The skills in role groups are automatically attached to the role levels.

What to do next

Create transitions using the **From Role Groups** and **To Role Groups** related lists. Related role groups have similar skill sets and can be used in suggesting the next possible lateral roles for an employee in other role groups. Adding a role group to the To Role Groups list will update the From Role Groups list of other role groups.

Adding a job profile to the employee

Adding a job profile to an employee identifies the position of the employee in the organization, further identifying the skills.

Before you begin

If you want to add or update employee job profile details manually, follow the procedure.
Role required: sn_skills_int.job_arch_admin, sn_skills_int.admin

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Procedure

1. Navigate to **All** and type `sn_employee_position.LIST` in the search bar.
2. Select **New**.
3. In the Employee job profile form, fill in the fields.

Employee job profile form

Fields	Description
Employee profile	The employee to link the job profile.
Job profile	The job profile relevant to the selected employee.
Location	The location of the employee.
Employment type	If the employee is permanent or on a contract.
Location type	If the location is remote or flexible.
Primary	Indicates if the job profile is the primary job profile for the employee.
Work description	General description of the work the employee is expected to perform.
Start date	The beginning date of this job for the employee.
End date	The end date of this job for the employee.
Job family	The category of job the employee belongs to. **Note:** If you don't see this field, add it to the form by configuring the form layout.
Source	The source of the job profiles.

Note: Employees can see suggestions while selecting their role specialty in the Career tab on the ESC portal only when the following requirements are met.

- The Primary field must be checked.
- The job family field must contain a value.
- the job selected is the current job of the employee.

4. Select **Submit**.

Map a role level to the employee profile

Mapping a role level to the employee is a critical step that links the job architecture data with the employee data in your organization, which enables you to track the skills of the employee.

About this task

The standard method to assign a role level is to create a Proactive Prompts configuration that is triggered when the job architecture tables are loaded and checks whether employees have one or more relevant role levels based on employee profiles and job profiles.

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- If an employee has more than one role level, a prompt with a list of relevant roles is sent to the employee. The employee selects suitable role levels from the list that are then added to the employee's profile.
- If an employee has a single relevant role, a scheduled job triggered in set intervals that checks for employees who do not have a primary role assigned automatically attaches the primary role to the employee profile.

This procedure describes how to run this scheduled job on demand.

Before you begin
Role required: sn_skills_int.job_arch_admin, sn_skills_int.admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and select the *`Attach unique role levels to employees`* scheduled job.
3. Select **Execute Now** button to run the job.

Result
The primary role of employees with a single role level are updated automatically in their profiles.

Map industry titles to role levels

Create a connection between common job titles in your industry with the role levels in your organization to provide relevant skill recommendations at the role groups level.

About this task
Role levels for employees must have either been imported into the Role level [sn_skills_int_role_level] table or added manually. For more information on the import process, see Load job architecture data into your ServiceNow instance.

Before you begin
Role required: sn_skills_int.job_arch_admin, sn_skills_int.admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search for and select the **Train Title classification** scheduled job.
3. Select **Execute now** to run the job.
4. Make the Job architecture title classification solution active.
   a. Navigate to **All** and enter `ml_solution.list` in the filter navigator.
   b. In the drop-down list of the **Search**
5. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
6. Search for and select the **Predict Title classification** scheduled job.
7. Select **Execute now**.

Result
The mapping is created in the Role Level M2M Industry Title [sn_skills_int_role_level_m2m_ind_title] table. A maximum of one industry title is fetched for each role level.

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Adding a skill in Skills Foundation

Add the skills required across your organization by Identifying the skills you currently have and might need. These skills can be associated with people and roles to deliver employee growth.

Before you begin

Role required: sn_skills_int.admin

Procedure

1. Navigate to **All** > *Skills Foundation* > **Skills**.
2. Select **New**.
3. Enter a name and description for the skill.
4. In the **Level type** field, select an appropriate skill level type.

   The available level types are:

   - Generic
   - Behavioral
   - Experience
   - Language
   - Technical

   Note: The Generic level type is available by default. For the remaining level types, you must select the option to install the skills demo data.

   For more information on defining a skill level type, see Define a skill level type.
5. Activate the skill by selecting the **Active** check box.
   The source field indicates whether the skills are managed Skills Foundation or by the admin.
6. Click **Submit**.

Add the Career tab and enable the Skills widget in the Employee Profile

Add the **Career** tab and enable the Skills widget in the Career tab to upload your resume/ LinkedIn profile and work with skills-related data in your Employee Profile.

Before you begin

Role required: sn_skills_int.admin, sn_skills_int.emp

Procedure

1. Navigate to **All** > *Employee Profile* > **Employee Definitions**.

   a. Select sys_user employee definition.

   Note: If you don't see an employee definition, create one by selecting **New** and saving it.

   b. Select **Generate Employee Profiles**.
2. Navigate to **All** > *Employee Profile* > **Setup**.

   a. Select **Opt-in** to choose employee profiles.
3. To enable Skills widget in the **Career** tab, navigate to **All** > **System Properties** > **All properties**.

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a. Search the Name column with `*skill`.

b. Select the sn_skills_int.enable_skills property.

c. Set the Value field to **True**.

Note: Make sure that you have the appropriate Read roles and Write roles as displayed in the property.

Result

The Career tab and Skills widget are added to your profile in the Employee Center.

Use a custom tab for the Career tab in Skills Foundation

Use a custom tab as a replacement for the **Career** tab in Employee Profile by updating the tab ID so employees are redirected to this custom tab.

Before you begin

Create a custom tab to display skills-related content in the employee profile. For more information on creating a tab, see Manage profile tabs and visibility in Employee Profile.

Role required: sn_skills_int.admin, sn_hr_sp.esc_admin

Procedure

1. Access the sys_id of the custom tab.
   a. Navigate to **All** > *Employee Profile* > **Profile Tabs**.
   b. Select the tab that you want to use instead of the **Career** tab.
   c. Select the Additional actions icon (≡) and select **Copy sys_id**.
2. Access the sn_skills_int-tab_id system property.
   a. Select **All**.
   b. In the navigation filter, type `sys_properties.list`.
   c. Search for `*skill` in the **Name** field.
   d. Select sn_skills_int.tab_id.
   e. In the **Value** field, replace the existing value with the sys_id of the customized tab.
   f. Select **Update**.

Result

The employee will be directed to the customized tab to view and modify the skills in *Employee Profile*.

Using Skills Foundation

By using the Skills Foundation application, your organization can identify the skills that an employee needs, determine the skill gaps within a role, and recommend the learning opportunities that the employee can do to bridge those gaps.

Employees can use the skills profile to add, delete, and update skills. For more information on skills profiles, see Career tab in Employee Center.

Import skills from your resume or LinkedIn profile

Import the skills residing in your resume or LinkedIn profile and add them to your Employee Profile in the *Employee Center* so that you have all your skills at one place and focus on your career development in the organization.

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Before you begin
Role required: sn_skills_int.emp

Note: This feature is only available to customers with a Pro-plus license.

Procedure

1. Navigate to **All** > **Employee Center**.
2. On the Employee Center home page, select the User options drop-down menu ().
3. Select **Profile**.
4. Select the **Career** tab.
5. Select the **Upload resume or LinkedIn profile** button.
6. Select **Browse files** to select the file in your local machine.
   The supported file formats are:
   - .pdf
   - .text
   - .docx
   - .zip (for LinkedIn)
7. Select **Open**.
   All the skills obtained from your resume or LinkedIn profile are displayed.
8. De-select the skills that you don't want to add to your Employee Profile.
9. **Optional:** Select the proficiency level for the skills by dragging the horizontal slider on the skill.
10. Select **Add to your profile**.

Result
The skills are added to the Additional skills section on the skills widget.

Add skills as part of your onboarding journey

Upload your resume or LinkedIn profile as part of your onboarding journey and add skills from them to your profile in *Employee Center* so that you can focus on growth and career development in the organization.

About this task

Note: You can upload your resume or LinkedIn profile after your employee profile is created in *Employee Center*. For more information, see Import skills from your resume or LinkedIn profile.

Before you begin
To enable recording skills when you join the organization, an activity item **Upload resume/ LinkedIn files to add skills to profile** is created as part of the Week 1 activity set of your onboarding journey. Make sure to check for the activity item and follow the procedure to add skills. Contact your system admin if you don't see the activity item.

Role required: sn_skills_int.emp

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Procedure

1. Navigate to **All** > **Self-service** > *Employee Center*.
2. On the Employee Center home page, select **My Tasks**.
3. Select the **Upload resume/LinkedIn files to add skills to profile** task.
4. Select **Click here** to upload the file.
   A new page is opened in the *Employee Center* to browse files.
5. Select **Browse the file** to select the file in your local machine.
6. Select **Open**.
   All the skills obtained from your resume or LinkedIn profile are displayed.
7. Select the skills that you want to add to your profile in *Employee Center*.
8. Select the Proficiency level for the skills that you selected.
9. Select **Add skills to profile**.
   A confirmation message is displayed after the skills are added successfully.
10. **Optional:** Select **View profile** to verify that the skills that were added.

Update your skill proficiency level

Update and track your proficiency level for each skill that you list in your skills profile by using the Skills Foundation application.

Before you begin
Role required: sn_skills_int.emp

Procedure

1. Navigate to **All** > *Employee Center*.
2. In the *Employee Center*, navigate to **Profile** > **Career** tab.
3. Select the Skills widget.
4. On the skills pill, select the menu icon ⋮.
5. Select **Change skill proficiency**.
6. Move the horizontal slider to adjust your skill proficiency level.
   Moving the slider to the right-hand side increases the proficiency level, and moving it to the left-hand side decreases the proficiency level.
7. Select **Update**.

Result
Your skill proficiency level is successfully updated in your skills profile.

Add skills by using the skill recommender

Search for the skills that you're interested in developing or improving and then add them to your skills profile by using the skills recommender in the Skills Foundation application.

Before you begin
Role required: sn_skills_int.emp

About this task
By adding skills to your profile, you can track all these details in one place.

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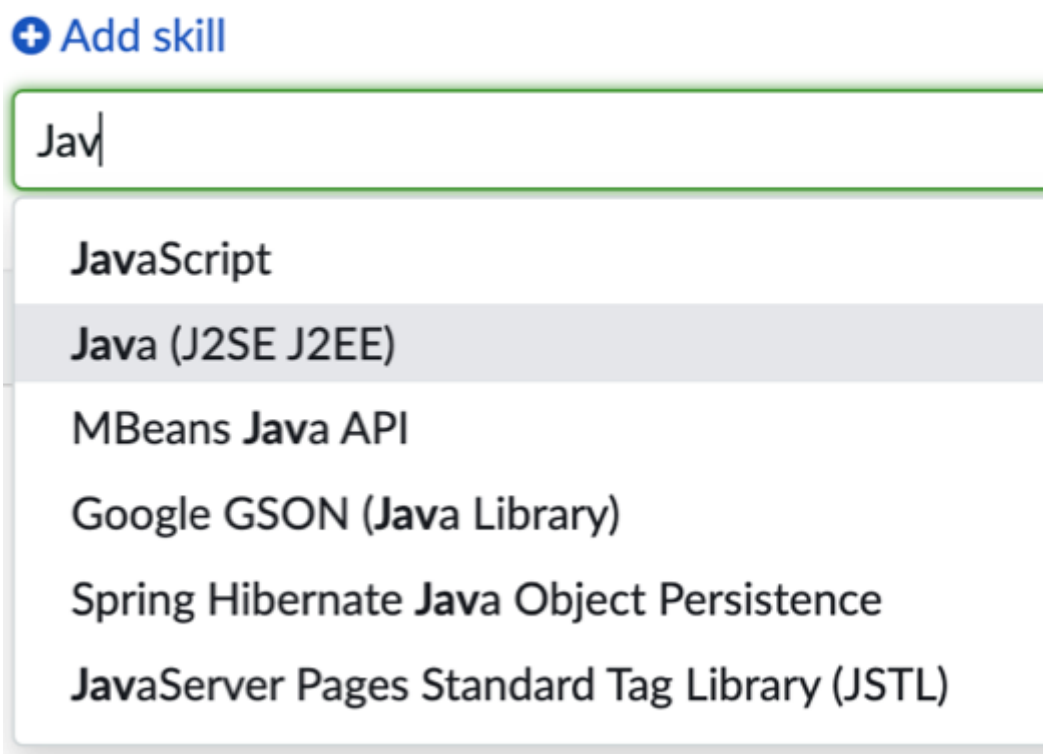
Procedure

1. Navigate to **All** > **Employee Center**.
2. In the Employee Center, navigate to **Profile** > **Career**.
3. On the skills widget, select the **Add skill** button.
4. In the search bar, search for the name of the skill that you want to add as shown in the following example.
   Search results are sorted alphabetically, with the top results displaying first.



> **Note:** If you don't see the skill recommendations, it indicates that the AI Search setup is broken. Clear your instance cache by entering `server_url/cache.do` in your browser. If the problem persists, then contact your system admin.

5. From the list of recommendations, select the skill that you want to add to your profile.

Result
The skill is added to your additional skills section.

Delete skills from skills profile

Employees can delete skills from the additional skills section in their skills profile.

Before you begin
Role required: sn_skills_int.emp

Procedure

1. Navigate to **All** > **Employee Center**.
2. In the **Employee Center**, navigate to **Profile** > **Career**.
3. On the skills widget, select the menu icon that is in the skill pill and then select **Delete skill**.

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Note: After a skill is validated, the employee can't delete the skill from the additional skills section of their skills profile.

4. Select **Yes, delete skill** to delete the skill.

Validate skills in Manager Hub

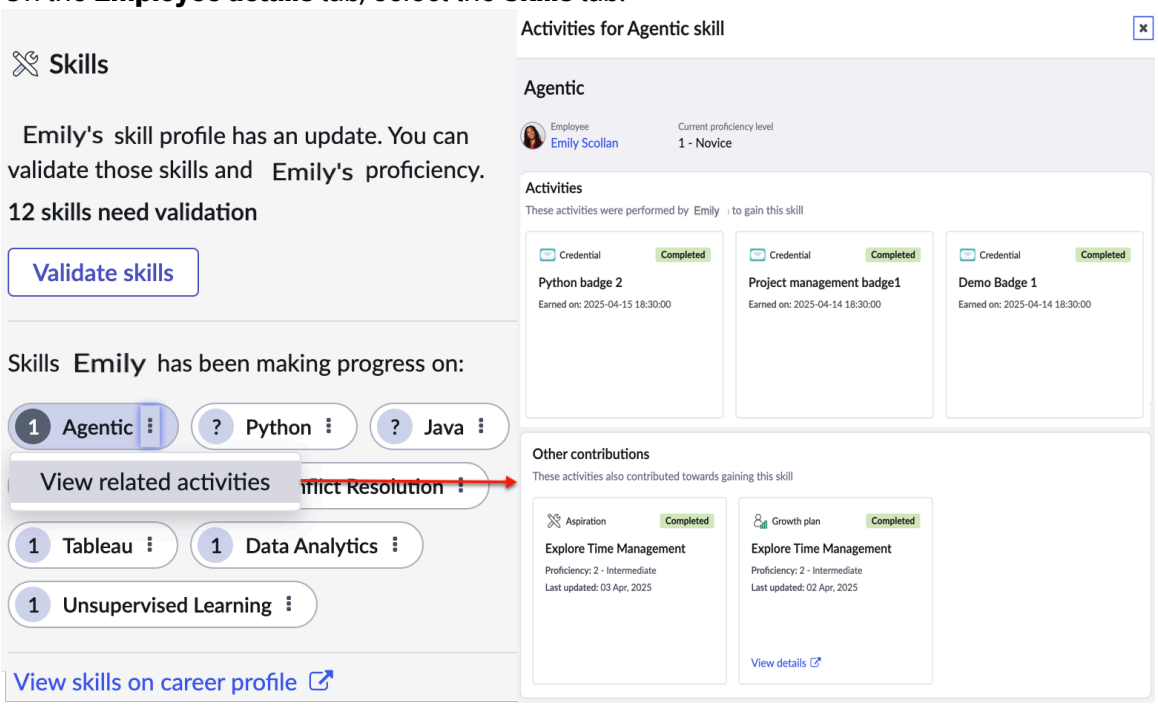
Affirm the skills that your employee claims to have by reviewing and validating them in Manager Hub.

Before you begin

Role required: sn_skills_int.manager

Procedure

1. Navigate to **All** > **Employee Center**.
2. In the Employee Center home page, navigate to **Your team** > **Manager Hub** > **Conversations**.
3. Open the conversation that is scheduled with your employee.
4. On the **Employee details** tab, select the **Skills** tab.



5. Select the **Validate skills** button, and then select the skills that you want to validate.
   The validated skills window displays the skill types, such as the required skills and all the other added skills, that your employee has.
6. Additionally, select any skill to review activities related to the skill that your employee has made progress on before you can validate it.
7. Select **Validate selected skills**.

Result

The validated skills are marked with a green tick in the employee skills profile, indicating that you validated the skills of your employee. For more information, see Career tab in Employee Center.

Skills Foundation Reference

Reference topics provide additional information about the properties and tables.

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Components installed with Skills Foundation

Several types of components are installed with the activation of the Skills Foundation application, including user roles and tables.

Skills Foundation roles

Roles in Skills Foundation

Role name	Operations	Roles
Skills Foundation manager	Can view and validate skills of an employee.	sn_skills_int.manager
Skills Foundation admin	Can configure system settings with complete access to all the features and functionality related to the employee.	sn_skills_int.admin
Skills Foundation employee	View and update the skills profile.	sn_skills_int.emp
Skills Foundation reader	Read the Skills Foundation records.	sn_skills_int.reader
Skills Foundation Job architecture editor	View and update the job architecture and required statuses.	sn_skills_int.job_arch_editor
Skills Foundation Job architecture admin	View, create, update, remove, and configure the job architecture.	sn_skills_int.job_arch_admin

You can assign these roles to the appropriate roles, groups, or users in your application.

- For information about how to assign a role to another role, see Add a role to an existing role.
- For information about how to assign a role to a group, see Assign a role to a group.
- For information about how to assign a role to a user, see Assign a role to a user.

Tables installed

Tables in Skills Foundation

Table	Description
cmn_skills	Stores the data related to skills.
sn_skills_int_job_family_m2m_job_profile	Stores the relationship between job profiles and job families.
sn_skills_int_job_family	Stores the job family that broadly classifies the jobs based on similar requirements.
sn_skills_int_company_job_arch_staging	Stores the Job architecture staging data.
sn_skills_int_job_profile	Stores the job profiles related to the jobs in your organization.
sn_skills_int_job_level	Stores the job levels in your organization.
sn_skills_int_job_level_to_level_config	Stores the progression between job levels.

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Tables in Skills Foundation (continued)

Table	Description
sn_skills_int_related_role_group	Stores the data of role groups that are related to each other.
sn_skills_int_role_group	Stores the role groups that classify the roles in your organization.
sn_skills_int_role_group_skill	Stores the skills data in the role groups.
sn_skills_int_role_level	Stores the role level data in your organization.
sn_skills_int_role_level_m2m_ind_title	Stores the data related to the industry titles imported into your ServiceNow instance.
sn_skills_int_employee_role_level_m2m	Stores the relationship of how an employee maps to a role level and whether it's a primary role.
sn_skills_int_role_level_skill	Stores skills at the role level.
sn_skills_int_proficiency_autofill_config	Stores the configuration for proficiency autofill. For more information, see Set the job proficiency level automatically.
sn_skills_int_extracted_skill	Stores skills extracted from a resume upload.
sn_skills_int_skill_onboarding_prediction	Stores the match/duplicate skill predictions from the custom skills imported.
sn_skills_int_skill_onboarding	Stores the custom skills imported.
sn_skills_int_skill_validation	Stores the validation information of the user skills.
sn_skills_int_user_managed_skill	Stores user skills added to the skills profile.
sn_skills_int_dynamic_skill	Stores the new skills requested from the dynamic sources (currently only from Credly).
sn_skills_int_dynamic_skill_requestor	Stores the requester information for the dynamic skills added.

Hiring Core

Hiring Core provides a repository where you can store information that you've created or received from any third party talent acquisition platform for your hiring requirements.

Tables installed

Table	Description
sn_ta_hiring_core_applicant_certification	Applicant certification table.
sn_ta_hiring_core_applicant_education	Applicant education table.
sn_ta_hiring_core_applicant_work_exp	Applicant work experience table.
sn_ta_hiring_core_extracted_skills	Extracted skills table.
sn_ta_hiring_core_interview_attendee	Interview attendee table.
sn_ta_hiring_core_interview_slot	Interview slot table.

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Tables installed (continued)

Table	Description
sn_ta_hiring_core_job_applicant	Job applicant table.
sn_ta_hiring_core_job_application	Job application table.
sn_ta_hiring_core_job_board	Job board table.
sn_ta_hiring_core_job_hiring_team	Job hiring team table.
sn_ta_hiring_core_job_interview	Job interview table.
sn_ta_hiring_core_job_posting	Job posting table.
sn_ta_hiring_core_job_requisition	Job requisition table.
sn_ta_hiring_core_profile_link	Profile link table.
sn_ta_hiring_core_recruitment_task	Recruitment task table.

Note: You can use the record tables according to your requirement.

Proficiency level autofill configuration form

Form to create a configuration to autofill the proficiency for a skill.

Proficiency level autofill form

Field	Description
Skill level type	The applicable skill level type for the configuration.
Role group	The applicable role group for the configuration. **Note:** The configuration is applied only to the selected role group. To indicate a global configuration that is applied to all role groups, leave the field blank.
Initial job level	The beginning job level for the configuration.
Initial proficiency	The beginning level of proficiency for the initial job level.
Active	Option to mark the configuration as active.
Order	The order in which to apply the configuration. For example, an order of 100 is applied first and an order of 200 is applied next.
Progression	The progression from one level to another. The options are: • None - No progression is applied. • Incremental - Increasing order of progression.

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Proficiency level autofill form (continued)

Field	Description
	• Decremental - Decreasing order of progression. • Fixed - Fixed order of progression.
Progression type	The type of progression based on the option selected in the **Progression** field. The options are: • Step - The progression increases or decreasing one step at a time across the job levels. • Spread - The progression is uniformly spread across the job levels.

Career Conversations

Supports an end-to-end process for individuals and managers to create and manage career growth conversations.

Explore



Learn now Career Conversations help managers and employees have important conversations.

Install and configure



ServiceNow administrators install and configure the Career Conversations app and related features.

Administer



Administrators maintain the Career Conversations app and related features over time as the organization grows and evolves.

Use



From the Employee Center managers and employees use the Career Conversations app to have conversations about career growth and development.

Reference



Reference information for Career Conversations.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Career Conversations application

The Career Conversations app provides employees and managers with the ability to create and track conversations between managers and employees.

Career Conversations is an application closely integrated with Talent Development Core. It is used to manage conversations between employees and manager. It also interacts with the Talent Development Core application to provide a complete career growth and development solution.

Discover and get apps on the Store

Go to the ServiceNow Store website to discover the new apps, solutions, and integrations that you can get.

For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Career Conversations

The Career Conversations application supports dialogue between subordinates and their leaders. This application enables your employees to engage in meaningful conversations that are focused on the employee's growth and development.

When the Career Conversations app is installed, you can use it to create and track conversations from the Employee Center. An employee's growth and development is produced substantially by the conversations held in the one-on-one discussions with their managers. These conversations are imperative in building strong relationships in the workplace. The effectiveness is optimized when the dialogue revolves around the employee's aspirations and growth plans. The Career Conversations app facilitates the administration of one-on-one conversations between leaders and their subordinates. It simultaneously improves the effectiveness of communication by enabling you to establish the topics of discussion.

Benefits of the Career Conversations app

The Career Conversations app provides the following benefits to your employees, managers, and organization:

Employees and managers

- Enables both employees and managers to initiate one-time or recurring conversations with each other to discuss the employee's growth and development within your organization.
- Add suggested or custom talking points so that the employees and managers can indicate pertinent topics of discussion associated with the employee's growth plans and aspirations. Talking points can be about aspirations or growth plans that employees share with their managers.

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- Create action items to specify discrete tasks that must be accomplished by the employee or manager to support subordinates with their goals and aspirations.
- Compose concealed notes for each conversation that an employee and a manager have with each other.

Organization

- Fosters an environment that promotes and increases internal mobility.
- Decreases attrition related to employee dissatisfaction.
- Boosts cost savings through employee retention.

Integration with Microsoft Outlook

The Career Conversations app provides an integration with Microsoft® Outlook® so you can conveniently schedule conversations with your employees or manager from the Employee Center. This integration enables you to view your employees or manager's calendar as it appears in Microsoft Outlook so you can effectively schedule meetings for each conversation during the conversation creation process. The integration with Microsoft Outlook lets your employees and managers schedule meetings using a single interface, thus developing a seamless process for creating conversations. This streamlined process simplifies the steps to create and schedule a conversation, which helps to promote the adoption of the Career Conversations app across your organization.

Conversation types

The Career Conversations app supports three types of conversations that you can use to facilitate discussions between subordinates and their leaders. To accommodate dialogue for the dynamic relationships that exist within an organization, this application supports the following conversation types:

Conversation type field values in Discussion Series form

Conversation type	Description
Growth conversations	A one-time or recurring conversation to discuss an employee's growth and development within your organization. This conversation type is intended for the employee-manager relationship.
Growth plan check-ins	A one-time check-in conversation to discuss a growth plan for career advancement that an employee shares with their manager. This conversation type is intended for the employee-manager relationship.
Mentoring conversations	A one-time conversation to discuss topics from which the mentee can benefit most and to provide counsel on career development. This conversation type is intended for the mentee-mentor relationship.

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Components of the Career Conversations app

Depending on your role within your organization, the Career Conversations app displays the following widgets when you access the Conversations home page from the Employee Center portal:

Roles and corresponding widgets on the Conversations home page

Role	Widget
Employee	Your conversations
Manager	• Your team's conversation • Coming up soon **Tip:** This widget reflects conversations that are set to transpire within one week of the system date.

After a conversation is created between an employee and manager, the Career Conversations app displays the agenda page. This page contains the following components that you can use to enhance your conversation:

Your agenda section

This section contains four widgets that you can use to administer, facilitate, and navigate your conversation. The Your agenda section contains the following widgets:

- Suggested talking points
- Talking points
- Action items
- Your notes

Contextual side panel

This side panel reflects your employee's name and job title in your organization. The contextual side panel also contains a list of details specific to the employee to whom the conversation pertains. A description for each employee detail appears on an accordion. When you expand an accordion, more information about the corresponding employee details appears. The contextual side panel provides the following accordions for each employee with whom you create a conversation:

- Aspirations
- Growth plans
- Feedback
- Skills
- Goals

The name of the contextual side panel changes depending on whether a manager or employee has accessed the conversation. The Career Conversations app displays the following names for the contextual side panel depending on your role within your organization:

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Roles and corresponding names for the contextual side panel

Role	Contextual side panel name
Employee	Your details
Manager	Employee details

The contextual side panel doesn't appear when the corresponding conversation is defined as a mentoring conversation.

Related topics

- Create a growth conversation in Career Conversations
- Schedule a growth conversation in Career Conversations
- Update a growth conversation in Career Conversations
- Schedule a growth plan check-in conversation
- Schedule a mentoring conversation in Career Conversations

Install and configure Career Conversations

Install and configure the features and components for the Career Conversations application.

Install Career Conversations

Install the Career Conversations app to enable employees and managers to create, manage, and track conversations.

Before you begin

Dependent plugins and apps for Career Conversations

- Manager Hub 3.0.0
- Talent Development Core
- See Install the Talent Development Core application.

Role required: admin

About this task

Important: You must install the Talent Development Core app before you install Career Conversations.

Career Conversations is dependent on features in Talent Development Core.

Procedure

1. Go to the ServiceNow Store and find the Talent Development Core application using the filter criteria and search bar.

   Under the **Request Install** button in the **Version** section, a list of available versions is displayed.

   Note: Select **Other App Versions** to view a list of all available versions of an application.

2. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. If demo data is available and you want to install it, select the **Load demo data** check box.

   Demo data includes sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
5. Select **Install**.

Add and manage Talking Points

As a Career Conversations admin, you can add or update talking points that are used by managers to help create a conversation with an employee.

Before you begin

Role required: sn_egd_act.admin or admin

Procedure

1. Navigate to **All** > **Career Conversations** > **Suggested Talking Point**.
2. Select **New**.
3. Complete the **Suggested Talking Point New record** form.
4. Select **Submit**.

Add Conversations

As an Career Conversations admin you can add or manage conversations that are assigned to employees on behalf of managers.

Before you begin

Role required: sn_egd_act.admin or admin

Procedure

1. Navigate to **All** > **Career Conversations** > **Conversations**.
2. Select **New**.
3. Complete the Discussion Series form.
4. Select **Submit**.

Configure automatic closure of past conversations

Use a system property to define whether a batch job can automatically close conversations that have transpired.

Before you begin

Role required: admin [sn_egd_act.admin]

Procedure

1. Navigate to the **All** menu, and enter `sys_properties.list` in the navigation filter. The System Properties [sys_properties] table appears.
2. In the **Search** field that appears underneath the Name column, enter `*egd`.

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A list of system properties associated with the Talent Developmentsuite of applications appears.

3. Select the *sn_egd_act.automatic_close* property.
4. Use the **Value** field to specify the option that enables or deactivates a batch job from automatically closing past conversations.

Option	Description
True	The job will close past conversations.
False	The job will not close past conversations.

5. Select **Update**.

Set up Microsoft Outlook integration in Career Conversations

Perform the following steps to set up an integration with Microsoft Outlook

Create a connection with Microsoft Exchange Online

Integrate the Career Conversations ServiceNow instance and Microsoft Exchange Online account by creating a custom OAuth application in Microsoft Exchange Online to authenticate ServiceNow requests.

Before you begin
Role required: admin

About this task
Set up conversations and sync them with Microsoft Outlook using a connection with the Microsoft Exchange Online spoke.

Procedure

1. Ensure that the Microsoft Exchange Online spoke is installed.
2. Set up Microsoft Exchange Online spoke.
   If you are a new customer, in the **Create Connection records for the Microsoft Exchange Online spoke** procedure, perform the following actions:
   - For **Microsoft_Exchange_Online** Connection and Credential alias, in the Connection related list, select **MS Graph 1** and make the changes.

     Do not change the **Name** and **Credential**. In the OAuth Entity Profile form of the **MS Graph 1** credential, ensure that the **Grant type** field is selected as **Client Credentials**.
   - For **Microsoft_Exchange_Online_clientCred** Connection and Credential alias, in the Connection related list, select **MS Graph 2** and make the changes.

     Do not change the **Name** and **Credential**. In the OAuth Entity Profile form of the **MS Graph 2** credential, ensure that the **Grant type** field is selected as **Client Credentials**.

Configure Microsoft Azure

Set up a authentication with Microsoft Azure to connect Microsoft Exchange Online.

Before you begin
Role required: Exchange administrator

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About this task

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. **Optional:** If you do not have an app registration, select **New registration**.
   a. On the form, enter the **Name** of the registration.
   b. Select the **Supported account types** of your choice.
   c. **Optional:** Specify the **Redirect URL**.
   Specify the following details:
      i. Select the platform as **Web**.
      ii. Enter the URL in the following format: https://<instance-Name>.service-now.com/oauth_redirect.do
4. If you already have an app registration, select the app registration.
   a. Navigate to **Manage** > **Authentication**.
   b. Navigate to **Add a platform** > **Web applications** > **Web**.
   c. On the Configure Web form, fill the fields.

Configure web form

Field	Description
Redirect URL	Enter a URL in the format: https://[instance].service-now.com/oauth_redirect.do
Implicit grant	Check **Access tokens**, and **ID tokens**

   d. Select **Configure**.
5. Add a client secret.
   a. Navigate to **Manage** > **Certificates and secrets**.
   b. In the **Description** field, enter a short description about the secret.
   c. Under **Expires**, select an expiry.
   d. Select **Add**.
   e. After adding, in the Client secrets section, copy the value by selecting **Copy to clipboard**.
6. Add a permission.
   a. Navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.
   c. Select **Microsoft Graph**.
   d. Select **Application permissions**.

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e. Under **Calendars**, select **Calendars.ReadWrite**.

f. Select **Add permissions**.

g. On the Configured permissions screen, select **Grant admin consent for ServiceNow**.

Result
The Microsoft Exchange Online is set up with Microsoft Azure.

What to do next
Configure resources Microsoft Exchange Online in the calendar. For more information, refer to https://learn.microsoft.com/en-us/exchange/recipients-in-exchange-online/manage-resource-mailboxes.

Configure the webhook registry of Microsoft Exchange Online spoke in Career Conversations

Configure callback URL for communication between the Career Conversations application and Microsoft Exchange Online calendar.

Before you begin
Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon () on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Role required: admin

Procedure
1. Navigate to **All** > **Microsoft Exchange Online Spoke** > **Webhook Registry**.
2. Select the **HRSD Event Subscription** registry.
   The webhook registry is provided by default with the application.
3. On the form, select **Callback URL**.
   The **Client State** and **Callback URL** is automatically generated.
4. Select **Update**.

Set system properties for Microsoft Outlook integration

Use system properties to enable integration between Career Conversations and Microsoft® Outlook® so you can simultaneously create and schedule conversations with the Career Conversations app.

Before you begin
Role required: admin [sn_egd_act.admin]

Procedure
1. Navigate to the **All** menu, and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.
2. In the **Search** field that appears underneath the Application column, enter `Career Conversations`.
   A list of system properties associated with the Career Conversations app appears.

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3. Select the following system properties and define the corresponding values.

System property	Value
sn_egd_act.calendar_provider_option	exchangeOnline
sn_egd_act.ex_online_notification_url	<Microsoft Exchange Online Notification URL to handle notifications>
sn_egd_act.ex_online_service_account_id	<Outlook service account used to manage calendar events>
sn_egd_act.portal_suffix	esc

Important: Select **Update** to save the values you defined for each of the previously mentioned system properties.

Using the Career Conversations application

Career Conversations enables manager and employees to create and track conversations from the Employee Center.

Create a growth conversation in Career Conversations

Use the Career Conversations app to create a one-time or recurring conversation with an employee. Discuss the employee's growth and development as a professional within your organization.

Before you begin

You must install the Career Conversations application to access it from the Employee Center.

You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

Role required: employee [sn_egd_act.employee] or manager [sn_egd_act.manager]

About this task

The functionality described in this task is applicable to organizations using the Career Conversations application without the Microsoft® Outlook® integration.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Use the navigation path that corresponds to your role within your organization to access the Career Conversations app.

Role	Path
Employee	**Your career** > **Conversations**
Manager	**Your team** > **Conversations**

3. Select the **Create a conversation** button.
   The Create a conversation panel appears.
4. In the panel, set the following fields.

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Create a conversation panel

Field	Description
Have this conversation with	The employee or manager with whom you want to converse. For employees, this field is automatically set to the name of the manager to whom they report. Alternately, managers can choose a specific employee that reports to them.
Conversation title	Name of the conversation. Depending on your role within your organization, this field is automatically set to one of the following options: ○ **Conversation with <employee first name>** ○ **Conversation with <manager first name>** You can change the value.
Date	Date of the conversation. The format is <YYYY-MM-DD>
Reoccurs	The frequency at which the conversation occurs.
End series on	Date on which the growth conversation series should end.

5. Select **Create conversation**.

Result
A notification is sent via email to the employee or manager with whom you created a conversation.

What to do next
Update the agenda for your upcoming conversation by using an option that corresponds to your role within your organization:

Employees

Use the Your conversations widget to access the conversation you created.

Managers

- Use the Your team's conversations widget to access the conversation you created.
- Use the Coming up soon widget to access the conversation that you created if it transpires within one week of the system date.

Schedule a growth conversation in Career Conversations

Use the Career Conversations app to simultaneously create and schedule a one-time or recurring conversation with your employee or manager. For each conversation you schedule, discuss the employee's growth and development as a professional within your organization.

Before you begin
You must install the Career Conversations application to access it from the Employee Center.

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You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

You must configure integration between the Career Conversations application and Microsoft® Outlook®. This integration enables you to view your employee or manager's calendar as it appears in Microsoft Outlook so you can schedule a meeting for your conversation during the conversation creation process. For more information about the integration process with Microsoft Outlook, refer to Integrating with Microsoft Outlook.

You must update system properties to enable integration between the Career Conversations application and Microsoft Outlook. For more information about updating the required system properties, refer to Set system properties for Microsoft Outlook integration.

Role required: employee [sn_egd_act.employee] or manager [sn_egd_act.manager]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Use the navigation path that corresponds to your role within your organization to access the Career Conversations app.

Role	Path
Employee	**Your career** > **Conversations**
Manager	**Your team** > **Conversations**

3. Select the **Schedule conversation** button.
   The Schedule a conversation panel appears.
4. In the panel, set the following fields.

Schedule a conversation panel

Field	Description
Have this conversation with	The employee or manager with whom you want to converse.
Conversation title	Name of the conversation. Depending on your role within your organization, this field is automatically set to one of the following options: ○ **Conversation with <employee first name>** ○ **Conversation with <manager first name>** You can change the value.
Date	Date of the conversation. The format is `<YYYY-MM-DD>`. You can use the **Show Calendar for Date** icon to select a date.
Start	The time at which the meeting starts. You can use the calendar that appears in this panel to determine availability for the date you specified in the **Date** field.

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Field	Description
End	The time at which the meeting ends. You can use the calendar that appears in this panel to determine availability for the date you specified in the **Date** field.
Reoccurs	The frequency at which the conversation occurs.

5. Select **Send invite**.

Result
A meeting for a conversation is scheduled on both yours and the recipient's calendar in Microsoft Outlook.

What to do next
Update the agenda for your upcoming conversation by using an option that corresponds to your role within your organization:

Employees

Use the Your conversations widget to access the conversation you created.

Managers

- Use the Your team's conversations widget to access the conversation you created.
- Use the Coming up soon widget to access the conversation you created if it transpires within one week.

Employees and managers

Use the link in the meeting invitation email.

Schedule a mentoring conversation in Career Conversations

Use the Career Conversations app to schedule a conversation with your mentee or mentor. For each conversation you schedule, discuss topics from which the mentee can benefit the most through the mentorship program.

Before you begin
You must install the Career Conversations application to access it from the Employee Center.

You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

You must configure integration between the Career Conversations application and Microsoft® Outlook®. This integration enables you to view your mentee or mentor's calendar as it appears in Microsoft Outlook so you can schedule a meeting for your conversation during the conversation creation process. For more information about the integration process with Microsoft Outlook, refer to Integrating with Microsoft Outlook.

You must update system properties to enable integration between the Career Conversations application and Microsoft Outlook. For more information about updating the required system properties, refer to Set system properties for Microsoft Outlook integration.

A mentor must accept the request for mentorship from a mentee.

Role required: employee [sn_egd_act.employee] or manager [sn_egd_act.manager]

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Your career drop-down list, select **Mentoring**.
3. Select the **You mentorships** tab.
4. In the Ongoing mentorships widget, select the **More Mentoring relationship actions** (vertical ellipsis) icon associated with the name of your mentee or mentor.
5. Select **Create conversation**.
   The Create a conversation panel appears.
6. **Optional:** Revise the name of the conversation in the **Conversation title** field if you don't want to accept the default.

   Tip: This field is automatically set to **Conversation with <mentee first name>**.

7. Select **Create conversation**.
   A record for the conversation you created appears underneath the name of your mentee or mentor when you expand the corresponding accordion.
8. Select the Conversation record that you created.
   The Conversation details panel appears.
9. Select **Schedule conversation**.
   The Schedule a conversation panel appears.
10. In the panel, set the following fields.

Schedule a conversation panel

Field	Description
Date	Date of the conversation. The format is `<YYYY-MM-DD>`. You can use the **Show Calendar for Date** icon to select a date.
Start	The time at which the meeting starts. You can use the calendar that appears in this panel to determine availability for the date you specified in the **Date** field.
End	The time at which the meeting ends. You can use the calendar that appears in this panel to determine availability for the date you specified in the **Date** field.

11. Select **Send invite**.

Result

A meeting for a conversation is scheduled on both yours and the recipient's calendar in Microsoft Outlook.

What to do next

Use the link in the meeting invitation email to update the agenda.

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Schedule a growth plan check-in conversation

Use the Career Conversations app to schedule a check-in conversation with your employee or manager about a growth plan explicitly related to the employee's career advancement within your organization.

Before you begin

You must install the Career Conversations application to access it from the Employee Center.

You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

You must configure integration between the Career Conversations application and Microsoft® Outlook®. This integration enables you to view your employee or manager's calendar as it appears in Microsoft Outlook so you can schedule a meeting for your conversation during the conversation creation process. For more information about the integration process with Microsoft Outlook, refer to Integrating with Microsoft Outlook.

You must update system properties to enable integration between the Career Conversations application and Microsoft Outlook. For more information about updating the required system properties, refer to Set system properties for Microsoft Outlook integration.

An employee must create and share a growth plan with their manager.

Role required: employee [sn_egd_act.employee] or manager [sn_egd_act.manager]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Use the navigation path that corresponds to your role within your organization to access the Growth plans module.

Role	Path
Employee	**Your career** > **Growth plans**
Manager	**Your team** > **Growth plans**

3. Use the widget that corresponds to your role within your organization to select the growth plan for which you want to create a conversation.

Role	Widget
Employee	Your growth plans
Manager	Your team's growth plans

4. In the topic header widget, select the **More growth plan actions** (vertical ellipsis) icon.

   Tip: The topic header widget is the widget that reflects the name of the growth plan.

5. Select **Edit plan**.
6. In the Plan activities widget, select the Add an activity drop-down list.
7. Select **Check-in**.
   The Add check-in activity panel appears.

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8. Select **Add**.
   A new activity for a check-in conversation appears in the Plan activities widget.
9. Select the activity for the check-in conversation you created.
   The Activity details panel appears.
10. Select **Schedule conversation**.
    The Schedule a conversation panel appears.
11. In the panel, set the following fields.

Schedule a conversation panel

Field	Description
Conversation title	Name of the conversation. This field is automatically set to **Check in and review your progress with your manager**. You can change the value.
Date	Date of the conversation. The format is `<YYYY-MM-DD>`. You can use the **Show Calendar for Date** icon to select a date.
Start	The time at which the meeting starts. You can use the calendar that appears in this panel to determine availability for the date you specified in the **Date** field.
End	The time at which the meeting ends. You can use the calendar that appears in this panel to determine availability for the date you specified in the **Date** field.

12. Select **Send invite**.

Result
A meeting for a conversation is scheduled on both yours and the recipient's calendar in Microsoft Outlook.

What to do next
Update the agenda for your upcoming conversation by using the link in the meeting invitation email.

Update a growth conversation in Career Conversations

Use the Career Conversations app to update the agenda for an upcoming conversation with your employee or manager. Center the focus of the discussion around the employee's growth and development as a professional within your organization.

Before you begin
You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

Role required: employee [sn_egd_act.employee] or manager [sn_egd_act.manager]

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Use the navigation path that corresponds to your role within your organization to access the Career Conversations app.

Role	Path
Employee	**Your career** > **Conversations**
Manager	**Your team** > **Conversations**

3. Use the widget that corresponds to your role within your organization to select the conversation that you want to update.

Role	Widget
Employee	Your conversations
Manager	○ Your team's conversation ○ Coming up soon **Tip:** This widget reflects conversa tions that are set to transpire within one week of the system date.

Tip: Employees and managers can use the link in the meeting invitation email to access the agenda for a conversation that is scheduled on their Microsoft® Outlook® calendar.

4. **Optional:** Select the **Edit details** button if you must reschedule your conversation.

Tip: The Career Conversations app displays the same panel that appears during the conversation creation process when you select this button.

5. In the Suggested talking points widget, add a suggested talking point that is relevant by selecting the **+ Add** button.

Tip: A suggested talking point must be defined by an administrator for the Suggested talking points widget to appear.

6. In the Talking points widget, select **Add talking point** and specify a topic of discussion applicable to the conversation that you want to have with your employee or manager.

Tip: Talking points can be about aspirations or growth plans that employees share with their managers. These aspirations and growth plans appear in the corresponding accordion in the contextual side panel. Employees and managers can use talking points to guide the conversation.

After you finish conversing about a talking point, you can select the corresponding check box to indicate that the conversation occurred.

7. In the Action items widget, select **Add action item** and specify tasks that must be accomplished by you.

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Tip: After the action item is completed, you can select the corresponding check box to indicate completion of the task.

8. In the Your notes widget, select **Add notes** and enter comments about the conversation that happened with your employee or manager.

   Tip: You can use this widget to reflect ideas that surfaced as a result of your conversation or to create reminders for yourself. The information you enter in this widget is only visible to you.

9. In the Skills widget, you can perform the following actions:
   a. Select **Validate skills** to review and validate the skills and proficiency of the employee.
   b. Select a **Skill pill** to view skills details like proficiency and activity details of the skill.
   c. Select the menu icon (⋮) on the skill pill and select **View related activities** to see the activity details of the skill.

   Any credentials obtained by the employee to gain the skill are displayed as activities.

   Note: This widget is only available for manager-employee conversations.

What to do next

Managers can manually close a conversation by indicating whether the conversation is canceled or complete. To indicate whether a conversation is canceled or complete, a manager must select the corresponding vertical ellipsis icon. This icon appears in the following locations:

- To the right of the **Edit details** button when you are viewing the agenda for a conversation.
- To the right of the Status column in the Your team's conversations widget.

Managers can provide a summary to reflect the details of a conversation that transpired when they select the option to complete a conversation. A notification is sent via email to the employee to indicate the conversation is complete. If the manager provided a summary, it is included in the email that the employee receives.

Close a conversation

As a manager, you can mark a conversation as completed to easily reference it for future planning and growth activities. Write closing notes and share them with your employee to ensure a shared understanding.

Before you begin

You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

Role required: manager [sn_egd_act.manager]

About this task

While the Career Conversations app includes a system property that automatically closes past conversations, managers can opt to manually close conversations. This allows them to add final thoughts that weren't captured during the conversation, and share them with employees. Once closed, the conversation becomes read-only, preserving the discussion for future reference. The manager can reopen a closed conversation for editing if needed.

Alternatively, there is the option to cancel the conversation, which is permanent and cannot be undone, whereas closing a conversation allows the manager to reopen and edit it later if needed.

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Close the conversation from the growth conversation page or the **Conversations** landing page.

Page	Steps
Growth conversation page	**a.** Use the **Your team's conversation** widget to select the conversation that you want to close. **b.** Select the more options button and select **Complete conversation**.
Conversations landing page	**a.** Navigate to the conversation that you want to close. **b.** Select the more options button and select **Complete conversation**.

3. In the **Closing thoughts** window, enter last thoughts to share with the employee and select **Complete conversation**.

Reopen a closed growth conversation

Use the Career Conversations app to reopen a closed growth conversation to modify talking points and action items.

Before you begin

You must provide your employees with a license to enable access to the Career Conversations app. For more information about employee licensing, refer to License Talent Development Core users.

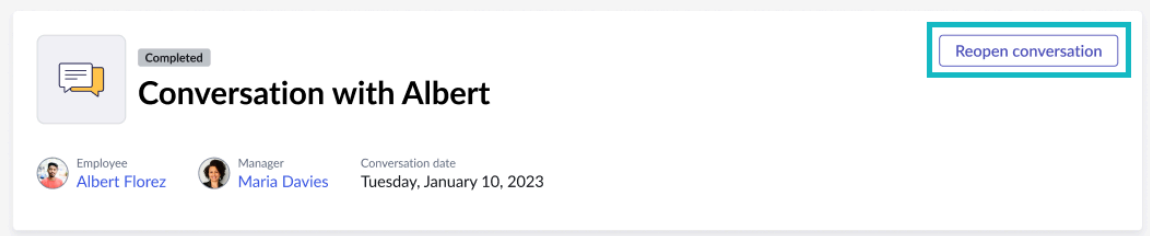
Role required: manager [sn_egd_act.manager]

About this task

When a conversation is closed, either manually by a manager or automatically by the system, it transitions into a read-only mode. In this state, both employees and managers can review the talking points and action items, but they cannot make any modifications. To continue the discussion or update any details, the conversation must be reopened by a manager. This ensures that all changes are authorized and maintains the integrity of the conversation history. Once reopened, the conversation becomes editable, allowing the manager and employees to add new points, update action items, or make any necessary adjustments.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Employee Center, navigate to **Your team** > **Conversations**.
3. Use the **Your team's conversation** widget to filter by **Past** conversations and select the conversation that you want to reopen.
4. Click **Reopen conversation**.



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What to do next
Modify the action items, notes, and skills, then close the conversation when you are done.

Edit a growth conversation series in Career Conversations

Edit a growth conversation series to add any details that you have missed out while creating the conversation.

Before you begin
You must have a growth conversation created in order to edit it, see Create a growth conversation in Career Conversations

Role required: employee [sn_egd_act.employee] or manager [sn_egd_act.manager]

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Use the navigation path that corresponds to your role within your organization to access the Career Conversations app.

Role	Path
Employee	**Your career** > **Conversations**
Manager	**Your team** > **Conversations**

3. Use the widget that corresponds to your role within your organization to select the conversation that you want to update.

Role	Widget
Employee	Your conversations
Manager	○ Your team's conversation ○ Coming up soon **Tip:** This widget reflects conversations that are set to transpire within one week of the system date.

Tip: Employees and managers can use the link in the meeting invitation email to access the agenda for a conversation that is scheduled on their Microsoft® Outlook® calendar.

4. Select **Edit series**.
5. In the panel, edit the following fields.

Edit series table

Field	Description
Conversation title	Date of the conversation. The format is <YYYY-MM-DD>
End series on	Date on which the growth conversation series should end.

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Note: The **Organizer** and **Have this conversation with** fields are not editable.

6. Select **Save**.

Create a growth conversation using an agent

As a manager, use the growth conversation preparation AI agent to streamline your employee growth discussions. Leverage this agent to gather key employee talent activity and journeys data to get a clear, structured summary that helps you prepare for the conversation faster and effectively. Rely on data-driven talking points, so every growth conversation is focused, meaningful, and impactful.

Note: For the Growth conversation preparation AI agent to work, you need to be on 3.6.3 version of Career Conversations and have the Now Assist for HR Service Delivery (HRSD) plugin which will install Now Assist for Talent and HR Talent AI Agent Collection.

AI agents for Conversations

Agentic AI feature	AI agents	Description
Create a growth conversation	Growth conversation preparation AI agent	The Growth conversation preparation AI agent helps managers initiate and prepare for growth conversations with their team members. It checks calendars to suggest suitable time slots, creates conversation entries, aggregates employee data from multiple systems, and generates structured talking points based on recent talent activity and journey history.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Career Conversations reference

Administrators use reference information to configure and maintain applications and features.

Components installed with Career Conversations

Several types of components install with Career Conversations, including roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles in Career Conversations

Application	Role title [name]	Description
Career Conversations	Admin [sn_egd_act.admin]	Contains Talent Manager role [sn_egd_act.manager].

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Roles in Career Conversations (continued)

Application	Role title [name]	Description
Career Conversations	Employee [sn_egd_act.employee]	Doesn't contain other roles.
Career Conversations	Manager [sn_egd_act.manager]	Contains Talent Employee role [sn_egd_act.employee].

Tables

Tables are used to track and maintain relationships among different ServiceNow applications and features.

Tables installed with Career Conversations

Application	Table label [name]
Career Conversations	Action Item [sn_egd_act_action_item]
Career Conversations	Discussion [sn_egd_act_discussion]
Career Conversations	Discussion Series [sn_egd_act_discussion_series]
Career Conversations	Suggested Talking Point [sn_egd_act_suggested_talking_point]
Career Conversations	Talking Point [sn_egd_act_talking_point]

Career Conversations Conversations reference

Career Conversations administrators create conversations that are used by managers and employees.

Conversations are created by managers to facilitate growth and development plans with employees. Growth Plans can be created from a conversion.

Discussion Series form

Field	Description
Employee	Select from the list of users in your organization. This field replaces the **Mentee** field when the **Conversation type** field is set to **Growth Conversations** or **Growth Plan Check-ins**.
Manager	Select from the list of managers in your organization. This field replaces the **Mentor** field when the **Conversation type** field is set to **Growth Conversations** or **Growth Plan Check-ins**.
Mentee	Select from the list of users in your organization.

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Discussion Series form (continued)

Field	Description
	This field replaces the **Employee** field when the **Conversation type** field is set to **Mentoring Conversations**.
Mentor	Select from the list of users in your organization. This field replaces the **Manager** field when the **Conversation type** field is set to **Mentoring Conversations**.
Cadence	Select the frequency at which the conversation occurs.
Conversation type	Select from the list of conversations available in your organization.
Title	The title of the conversation. This information is visible to users.
Active	When selected, the conversation is published and visible to users.
Table name	Select the table containing the data that you want to use. This field appears only when the **Conversation type** field is set to **Mentoring Conversations**.
Related record	Select the record you want to use from the table you specified in the **Table name** field. This field appears only when the **Conversation type** field is set to **Mentoring Conversations**.

Create Suggested Talking Points reference

Career Conversations administrators create suggested talking points that are used to identify topics of discussion during a conversation.

The form that appears when you create a record in the Suggested Talking Points table contains the following fields:

Suggested Talking Point form

Field	Description
Start date	A date for when the talking point is first available.
End date	A date when the talking point is no longer be available.

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Suggested Talking Point form (continued)

Field	Description
Title	The visible title for the talking point that's displayed in the user interface (UI).
User criteria	Select the criteria that must meet to have access to this talking point.
Active	When selected, the talking point is published and available to be used in a conversation.
Conversation type	The types of conversations to which your suggested talking point is applicable.

Suggested Talking Points table

Career Conversations administrators can manage conversations that are used by managers and employees.

The form that appears when you select a record in the Suggested Talking Points table contains the following fields:

Suggested Talking Point reference

Field	Description
Active	When selected, the talking point is published and available to be used in a conversation.
End date	A date when the talking point is no longer be available.
Start date	A date for when the talking point is first available.
Title	The visible title for the talking point that's displayed in the user interface (UI).
User criteria	Select the criteria that must meet to have access to this talking point.
Conversation type	The types of conversations to which your suggested talking point is applicable.

Learning

Learning application enables you to discover, manage, and engage with career development content. It enables users to configure learning catalogs that contain course items from both internal and external learning systems.

Learning includes the following key features:

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Get started

Explore  Detailed information on Learning	Configure  Configure the application to get started	Use  Learn how to manage and use Learning experience
Reports  Measure the success of learning content through targeted reports	Reference  Get details about user roles, tables, and default configurations in Learning	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Learning

Learn about the benefits of using Learning to proactively discover, manage, and engage with career development content.

Learning overview

Learning is a new and modern centralized space to manage your learnings. Using this learning portal will give you clear view of your in-progress and assigned coursework that enables you to focus on your learnings. For more information, see My Learning.

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Learning users

Learning Users

User	Description
Manager/Administrator	Learning administrators and managers can view and manage content activity and history, and based on these insights they can create meaningful learning for learners with proper governance.
User	• **Track achievements:**Track your learning using the achievements feature. Achievements provide badges and certifications for gamification. • **Share your learning:**Track Share learnings using functional lists of all content that you have interacted with from the beginning of your learning. Personal collections enable you to save content into customized folders for easy reference and sharing. • Leverage Skills Foundation: Skills Foundation integrates with Learning to allow you to perform skills-driven learning search results. Review courses based on Skills Foundation recommendations and suggestions aligned with your skills.

Learning benefits

Learning benefits

Benefit	Feature	Users
Discover new courses by browsing through highlighted content promoted by the learning team, popular learning-related searches, and recommended content based on learners similar to you.	Discover	Employees/Users
View recent learning content activity and history. You can leverage the functional lists of all content that you've interacted with from the beginning of your learning. Personal collections enable you to save content into folders for easy reference and sharing.	Activity	Employees/Users
Showcase your learning achievements when you learn something new or complete a course.	Achievements	Employees/Users
View and track your team's learning to be able to streamline their career growth.	Assigned to your team	Managers

What to explore next

To learn more about configuring and using , see:

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- Install and configure Learning
- Using My Learning
- Learning reference

My Learning

My Learning is a new and modern user portal that enables you to pursue courses that help you grow in all aspects of your career.

The Learning portal provides you with a bird's eye view of all your learning, courses, and achievements.

Learning Overview

The Overview page is the first page that you see when you access My Learning after navigating from Employee Center. Use this page to quickly identify learning that needs attention, visualize recent progress and recent achievements, view all recent activity, and resume any courses that are in-progress.

Discover

Use the Discover tab to find trending courses across your organization. You can browse through highlighted content promoted by the learning team, popular learning-related searches, and recommended content based on learners similar to you.

Activity

Use the Activity tab to view your entire content activity and history. You can leverage the functional lists of all content that you've interacted with from the beginning of your learning. Personal collections enable learners to save content into folders for easy reference and sharing.

Achievements

Use the Achievements tab to review the achievement badges that you've earned. You can view detailed achievement information. All achievement rules and criteria are created and managed in the back-end using Learning. For more information, see Create an achievement definition.

Overview tab

The **Overview** tab on My Learning provides a variety of widgets that help you track courses, view your progress, view achievements among other things.

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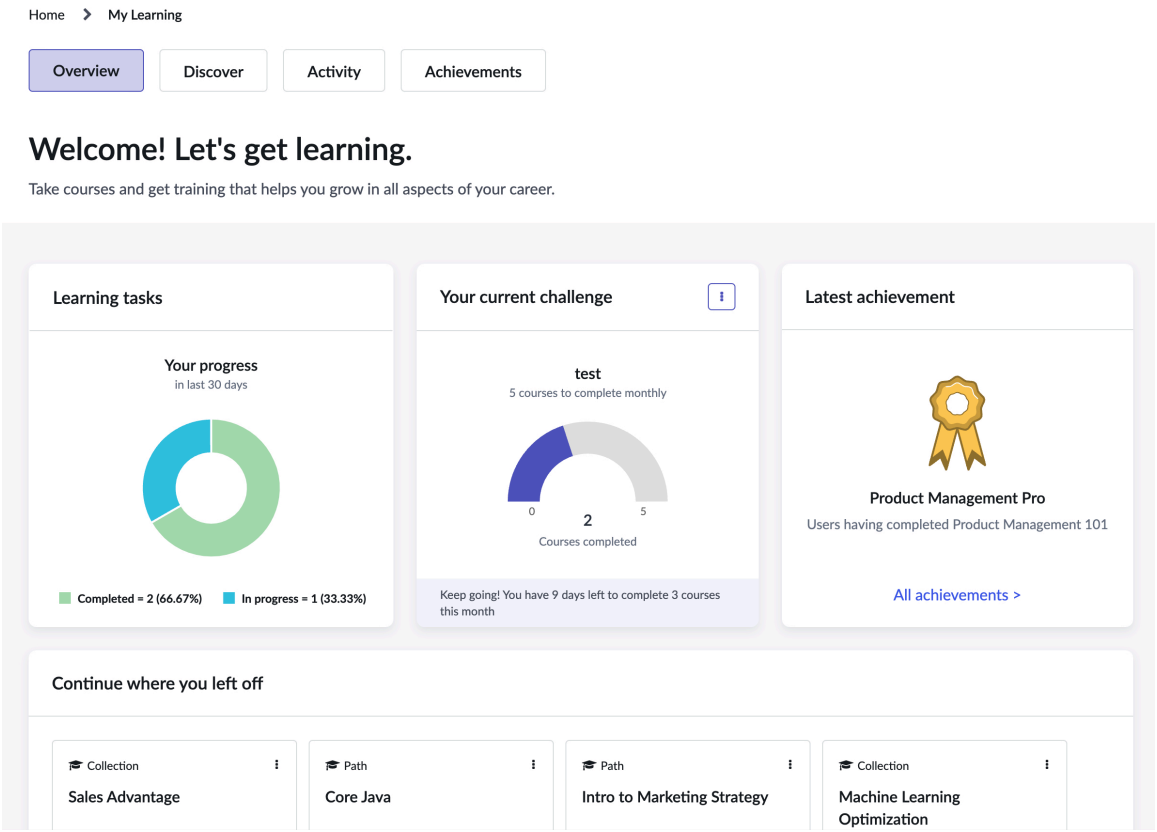
The overview tab has the following widgets that help you with a seamless learning experience:



Overview tab

Widget	Description
Finish these learnings before they're due	Shows you overdue courses and trainings so you can plan to complete them before they're due.
Learning tasks	Shows you learning tasks that are in progress and assigned and displays the progress in last 30 days.
Your current challenge	Shows you challenges that you started and the days left before it starts and also lets you discover new things to learn.
Latest achievement	Latest achievement shows you all your earned achievements based on your learning progress.
Continue where you left off	Shows you the courses or trainings that you started but never finished, and gives you the chance to continue where you left off.
Recent activity	Shows your assigned, saved, shared courses and trainings, and also shows your learnings history.

Discover

The **Discover** tab on My Learning provides a variety of widgets that help you browse through courses, paths, and collections.

The **Discover** tab has the following widgets that help you with a seamless learning experience:

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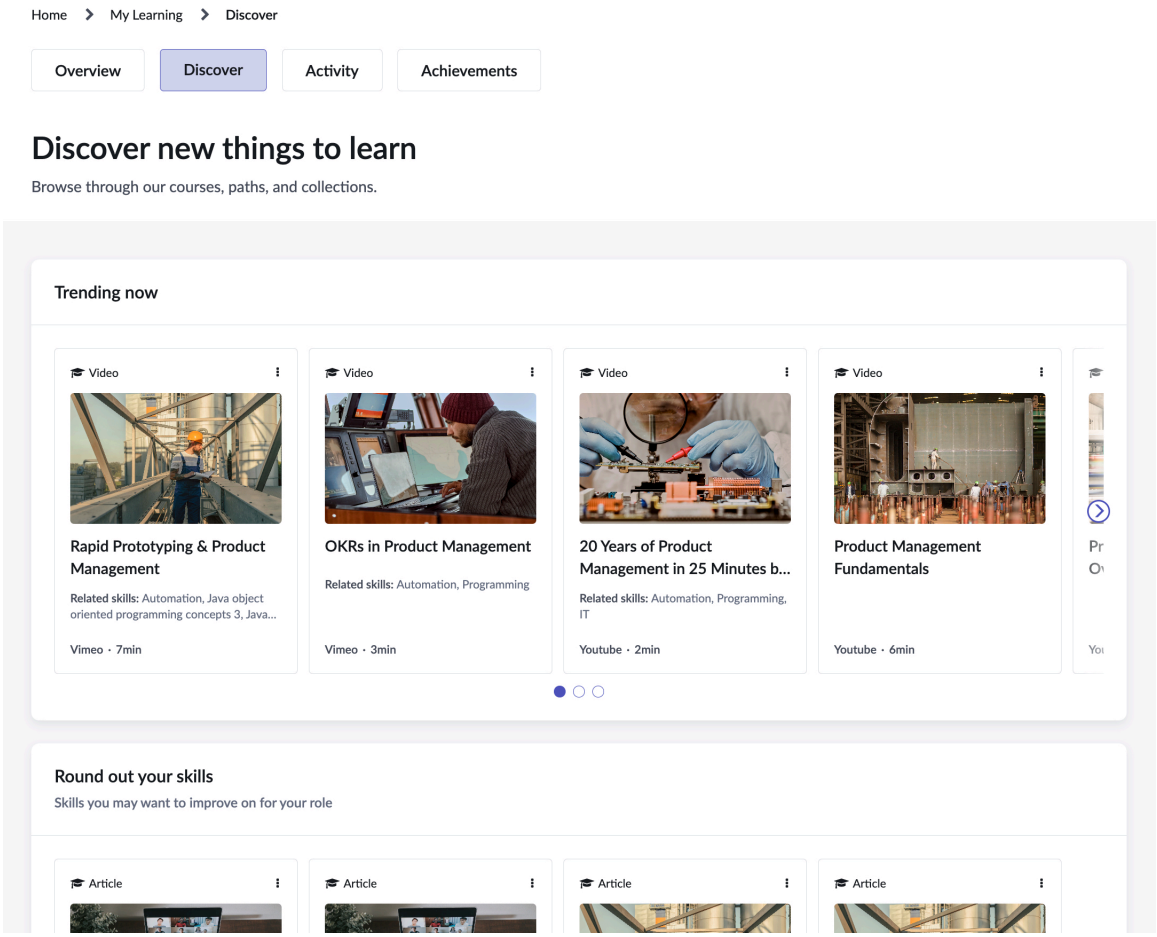
Discover tab



Discover

Widget	Description
Trending now	Shows you courses, paths or collections that are trending now so you can discover new things to learn.
Round out your skills	Recommends courses based on the skills you may want to improve for your role.
Search	Enables you to search within Learning to find a course.

Activity

The **Activity** tab on My Learning provides a variety of widgets that help you see your assigned, saved, shared, and completed courses.

The activity tab has the following widgets that help you with a seamless learning experience:

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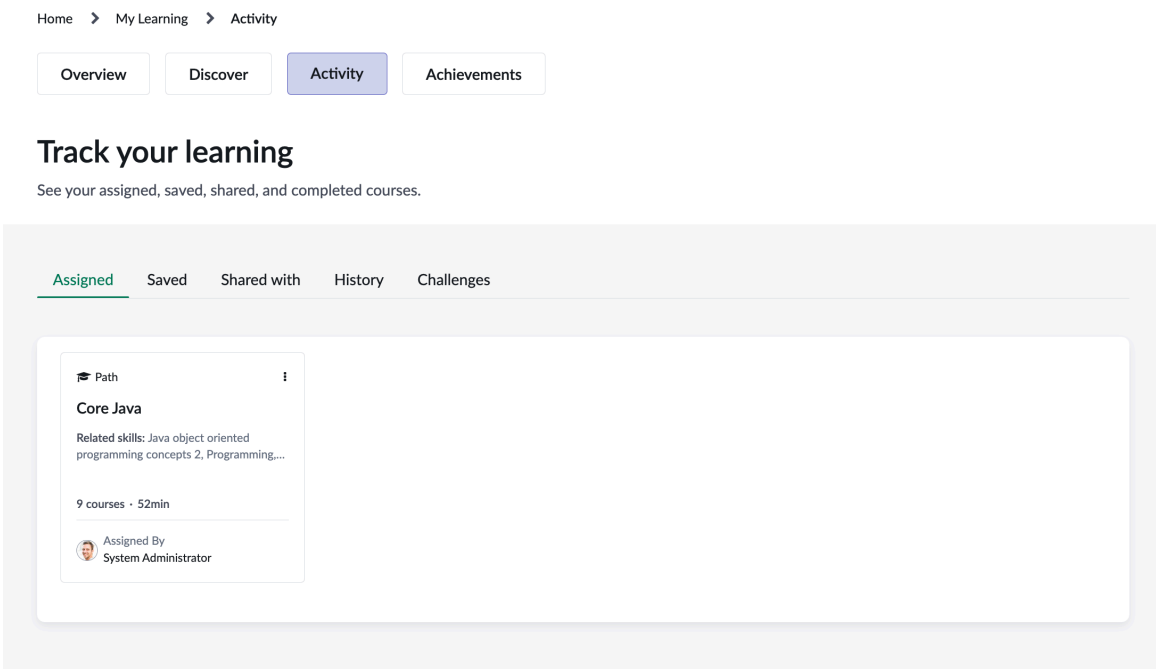
Activity tab

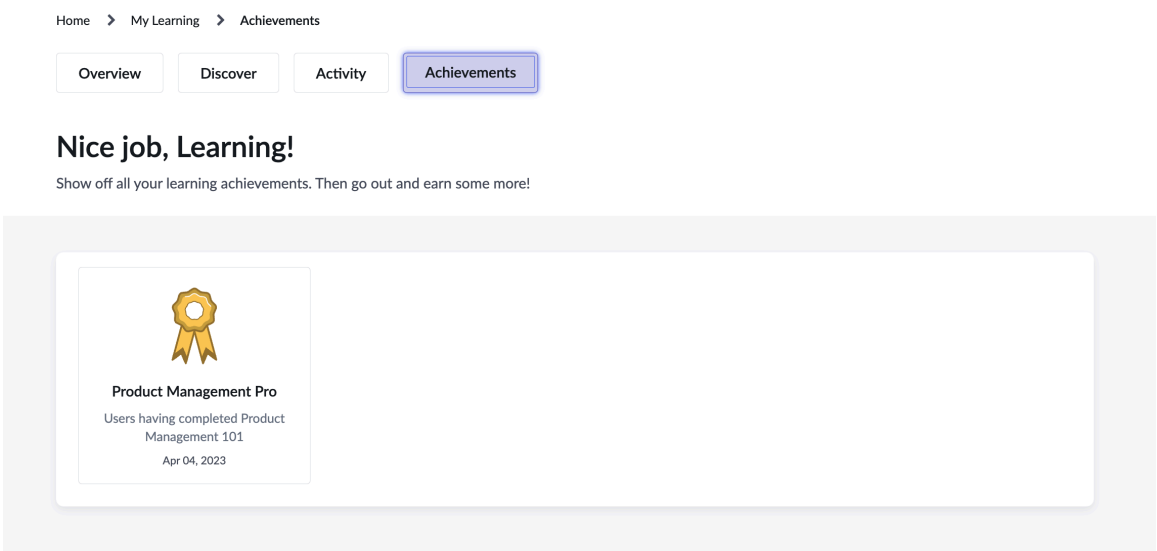


- Assigned: View courses currently assigned to you.
- Saved: View your saved collections.
- Shared with: View courses and collections shared with you.
- History: View all the courses that you have completed.
- Challenges:View learning challenges that you have set for yourself.

Achievements

The **Achievements** tab on My Learning shows you all your learning achievements.

Achievements tab



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Achievements

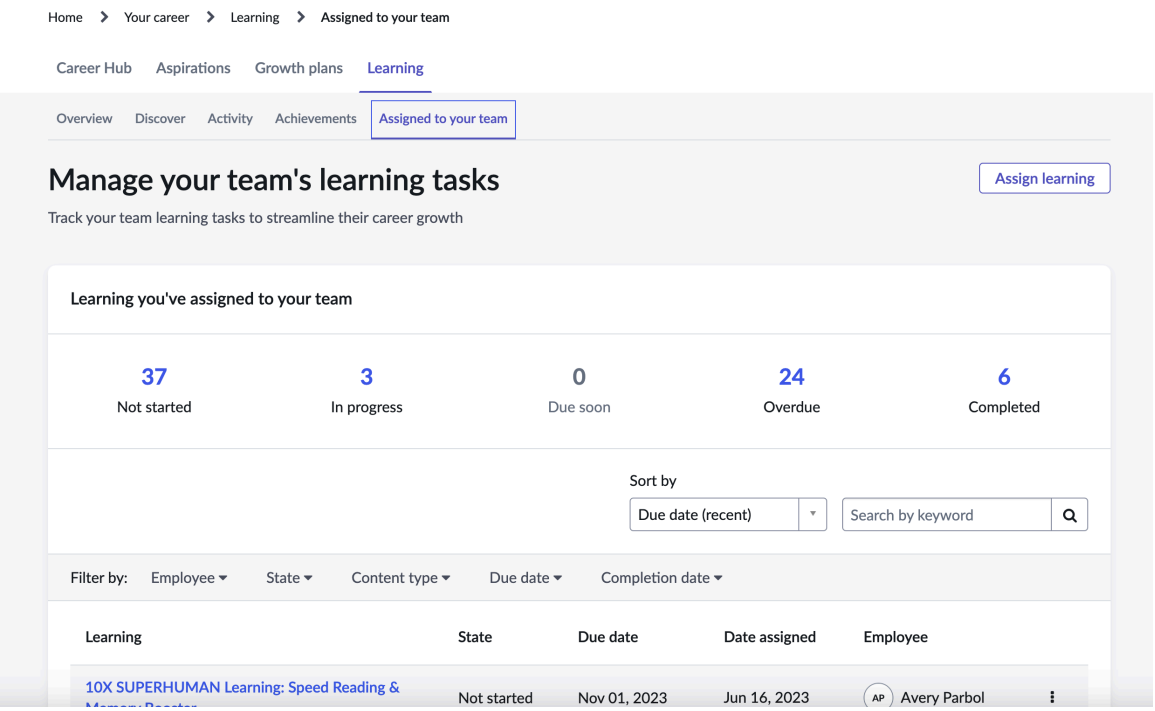
Widget	Description
Achievements	Shows your learning achievements. When you learn something new and complete a course you can earn achievements and see them here.
Badges	Displays your achievement badges, if any from Credly.

Assigned to your team

Track your team learning tasks to streamline their career growth.

Manage your team's learning tasks.

The Assigned to your team tab has the following information that helps you understand the learning progress of your team.



- Learning you've assigned to your team: View the status of the learnings assigned to your team.
  - Not started
  - In progress
  - Due soon
  - Overdue
  - Completed.
- Filters: Use the Employee, Status, Content type, Due date, and Completion date filters to sort your team's learnings.
- Assign learning: As a manager, assign Learning to your team members to enhance their skills.

Learning integration with Skills Foundation

Skills Foundation integrates with Learning to introduce skills-driven learning search results; recommend and suggest courses based on a learner's skills.

Learning integrates with Skills Foundation to enhances a user's learning experience.

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When the Skills Foundation property sn_skills_int.enable_skills is set to true, the use of is enabled for Learning. See Configuring Skills Foundation for more information about Skills Foundation properties.

Skills associated with Learning content

- Read-only list of goals associated with a learning course, collection or path.
- Related skills section on the details page.
- Skills-driven learning search results.

Adding skills to a Learning course

- Skills intelligent widget to search select skills.
- Integration with Skills Foundation, allows you to Add associated skills to learnings.

Skills based AI Search

- Results based on relevance from course title and associated skills.
- No adjacent skills included.
- Direct text match search on skill term.

Skills based learning recommendations

- Learning recommendations presented with My Learning
- Recommendation based on skill gaps between employee's skills and those identified as required for their current job.

Install and configure Learning

Configure Learning by setting up the following dependencies.

Before you begin
Dependent plugins and apps for Learning:

- Manager Hub
- Skills Foundation

  When the Skills Foundation property **sn_skills_int.enable_skills** is set to true, the use of Skills Foundation is enabled for all Learning. See Configuring Skills Foundation for more information about Skills Foundation properties.

Role required: admin

About this task
When an administrator installs the Learning app from the ServiceNow store, it integrates learning, skills identification, aspirations, and planning for a personal career growth and development plan.

Procedure

1. Go to the ServiceNow Store and find the application using the filter criteria and search bar.

   In the list next to the **Install** button, the versions that are available to you're displayed.

2. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. If demo data is available and you want to install it, select the **Load demo data** check box.

   Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.
5. Select **Install**.

What to do next

Allow RCAs

After you install Learning you might encounter Restricted Caller Access (RCA) approval messages requesting an update in the access request. Allow the following RCAs:

- Target Human Resources Core
- Target Journey Accelerator
- Target Journey Designer

Dependencies

The Learning application depends on other applications such as Learning Core and Employee Profile.

Activate and setup Learning

Learn how to set up and start using Learning.

Activating application

You can activate the Learning from the ServiceNow store. This application includes demo data and activates related plugins if they aren't already active.

Note: Learning is available with the Employee Center application. Some of the features of Learning work only when the HR Service Delivery and Employee Journey Management applications are activated.

Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Licensing

Learning leverages the new, Talent Development licensing module. This licensing feature allows registered ServiceNow applications to grant users licenses for the apps based on employee profile and other additional criteria.

Configuring data

Learning comes with optional demo data.

For more information, see Install and configure Learning and Learning reference.

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Skills Foundation integration with Learning

Learning integrates Skills Foundation to skill based recommendations for a learner. Learning admins can add skills to a learning course by searching and selecting skills using the skills Intelligent widget.

For more information, see Using My Learning.

Using My Learning

Use My Learning in Employee Center to access your learnings and achievements.

Enroll in a course collection on My Learning

Enroll in a course collection to pursue courses that can enhance your skills.

Before you begin

Role required: learning.user

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning** > **Discover**.
2. Select a course collection or path that you want to pursue.

   Note: The option to enroll is available only within a course collection or a path.

3. Select **Enroll**.
4. Select **Start** to start learning.
5. **Optional:** Select **Skip** within a course collection and continue to the next course.
6. **Optional:** Toggle the **Show completed** switch to view the courses that you've completed and ignore the ones that you've skipped.

   Note:

   - Although certain courses can be skipped in a course collection or a path, they must be completed or skipped in the order that they appear.
   - The Show completed toggle switch is available only for content that is skipped within a course collection or path.

Resume a course

Use this widget to easily access and resume any course that you may have left mid-way.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning**.
2. In the Overview page, select the course, course collection, or path that you want to resume from the Continue where you left off widget.

   Note: This widget is only available when you have courses that are in the in-progress state.

3. Select **Resume**.

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Create a personal course collection

Create personal collections to include the courses and paths that you would like to access easily.

Before you begin
Role required: user

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning**.
2. Select the context menu icon ☰ on any course that is displayed on the screen.
3. Select **Save to collection**.
4. Select **Create New**.
5. On the form, fill in the fields.

Create new collection form

Field	Description
Collection name	Name of the new personal collection.
Description	Brief description of the personal collection.

6. Select **Save**.

Save courses to your personal collection

Save courses of interest to your personal collection for easy access and to plan your learning.

Before you begin
Create a personal course collection. For more information, see Create a personal course collection.

Role required: user

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning**.
2. Select the context menu icon ☰ on any course displayed on the screen.
3. Select the collection that you want to save the course to.
4. Select **Apply**.

> **Note:** If you haven't yet created a personal collection, see Create a personal course collection.

Create a Learning challenge

Create a Learning challenge to challenge yourself to complete a particular number of courses within a time frame that you choose.

Before you begin
Role required: none

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About this task
Learning challenge is a new widget available on the Overview tab that gives you a quick overview of all the challenges you've created to track your learning progress.

Procedure
1. Navigate to **All** > **Employee Center** > **My Learning**.
2. On the My Learning home page, select **Start a Learning Challenge**.
3. On the form, fill in the fields.

Set a learning challenge form

Field	Description
Give your challenge a title	Title for your challenge.
How frequently do you want to track your course completion?	Suitable frequency to track your course completion status. The available frequencies are: ○ Weekly ○ Monthly ○ Quarterly ○ Yearly
When do you want to start?	Month in which you intend to begin with the challenge.
How many courses do you want to complete in each tracking period?	Number of courses that you target to finish for each tracking period.

4. Select **Save changes**.

Result
A Learning challenge is created along with a new widget on the Overview tab to track your progress.

Complete a learning challenge
Complete a learning challenge whenever you're ready to finish with it.

Before you begin
Role required: no role required

Procedure
1. Navigate to **All** > **Employee Center** > **My Learning**.
2. On the learning challenge widget, click the context ⋮ icon.

> **Note:** You might see different labels on the widget depending on your current status on the challenge. If you have started the challenge, you will see Your current challenge.

3. Select **Complete challenge**.
4. Click **Yes, I'm done**.

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Result
The current challenge will be completed, but you can always revisit it under the **Activity** tab.

Restart a learning challenge

Restart a challenge when you want to reset the progress you have made on the challenge.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning**.
2. On the learning challenge widget, select the context ⋮ icon.

   Note: You might see different labels on the widget depending on your current status on the challenge. If you have started the challenge, you will see Your current challenge.

3. Select **Start again**.
4. On the **Do you want to restart this challenge** pop-up, click **Yes, I'm done**.

View recent activity

Review your recent learning activity with easy access to your assigned, saved, shared with, and history tabs.

Before you begin
Role required: learning.user

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning**.
2. View your assigned, saved, shared with you, and history of completed courses using the following tabs available under the **Activity** tab on My Learning.
   - Assigned: View courses that are assigned to you here.
   - Saved: View courses saved to your personal collection here.
   - Shared with: View courses that are shared with you by others here.
   - History: View information on your completed courses here.

Assign Learning to your team

As a manager, assign Learning to your team members to enhance their skills.

Before you begin
Role required: sn_lc.learning_manager

Procedure

1. Navigate to **All** > **Employee Center** > **My Learning** > **Assigned to your team**.
2. Select **Assign learning**.
3. On the form, fill in the fields:

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Assign Learning form

Field	Description
Assign this Learning to	Learner who the learning is assigned to.
Assigned material	Learning material to be assigned to the assignee.
Assignment description	Reason for assigning this Learning to the learner.
Due by	Date that the Learning is due.

4. Select **Assign**.

Manage Learning

Using Learning, learning administrators can manage user activities. To aid the users learning journey, learning admins can create achievements, define achievement rules, and monitor the overall learning activity of a user.

Create a content collection

Create a content collection in Learning to dynamically group Learning content that includes multiple internal and external courses.

Before you begin

Every collection must be a part of a course catalog. Create a course catalog before you create a collection. For more information, see Create a course catalog.

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Collection**.
2. Select **New**.
3. On the Collection form, fill in the fields.
   For a description of the field values, see Collection form.
4. Select **Submit**.

Related topics

Collection form

Add course items to collection

Add learning course sections

Add course items to collection

After you create a collection, add course items as groupings of courses that are orchestrated within ServiceNow®.

Before you begin

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Create a content collection. For more information, see Create a content collection.

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Procedure

1. Navigate to **All** > **Learning** > **Content** > **Collection**.
2. Select the collection that you want to add course items to.
3. On the **Course Collection Items** tab, select **New**.
4. On the form, fill in the fields:

Collection course item

Field	Description
Collection	Associated course collection.
Course	Course item to be added to the selected collection.
Order	Order that defines the start of a new section. All learning courses that have order greater than this defined order will be displayed under this section.
Mandatory	If it is mandatory for the course item to be added to the collection.

Define user access to course within a collection

Define user access to the collection to define who has read access to the collections.

Before you begin

Role required: admin

Create a collection. For more information, see Create a content collection.

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Collection**.
2. Open the collection that you want to define user access for.
3. On the Can Read related list, select **Edit**.
4. Add users who should have access to the course catalog.
5. On the Cannot Read related, select **Edit**.
6. Add users who should not have access to the course catalog.

> **Note:** When a user is present in both Can Read and Cannot Read related lists then Cannot Read takes precedence, and the user is restricted from read access to that course catalog.

Add learning course sections

Add learning course sections to collections.

Before you begin

Role required: sn_lc.learning_admin

Create a collection. For more information, see Create a content collection.

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Procedure

1. Navigate to **All** > **Learning** > **Content** > **Collection**.
2. Open the collection that you want to add learning course sections to.
3. On the Learning Course Sections related list , select **New**.
4. On the form, fill in the fields:

Learning course section

Field	Description
Title	Name of the learning course section.
Course item	Associated course item.
Order	Order of the learning course item within the collection.
Short description	Description of the learning course item.

5. Select **Submit**.

Assign topics to a collection

Add assigned topics to collections.

Before you begin
Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Procedure

1. Navigate to **All** > **Content** > **Collection**.
2. Open the collection that you want to add assigned topics to.
3. On the Assigned Topics related list , select **Add**.
4. Select a topic to be added as connected content to the collection.

Create internal Learning content

Create internal Learning courses so that employees can learn new content and enhance their skills set.

Before you begin
Role required: sn_lc.catalog_manager

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Internal Content**.
2. Select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Learning internal content form.
4. Select **Submit**.

What to do next
Add associated skills to external learning content in Learning. For more information, see Add associated skills to Learning content.

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Related topics

Learning internal content form

Define user access to course within internal learning content

Define user access to define who has read access to internal learning content.

Before you begin

Role required: admin

Create internal learning content. For more information, see Create internal Learning content.

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Internal Content**.
2. Open the internal learning course that you want to define user access for.
3. On the Can Read related list , select **Edit**.
4. Add users who should have access to the internal learning course.
5. On the Cannot Read related list , select **Edit**.
6. Add users who should not have access to the internal learning course.

Note: When a user is present in both Can Read and Cannot Read related lists then Cannot Read takes precedence, and the user is restricted from read access to that internal learning course.

Assign topics to internal content

Add assigned topics to internal learning content.

Before you begin

Role required:sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Procedure

1. Navigate to **All** > **Content** > **Internal Content**.
2. Open the internal learning course that you want to add assigned topics to.
3. On the Assigned Topics related list, select **Add**.
4. Select a topic to be added as connected content to the internal learning course.

View external Learning content

View the details of all course items that are pulled from external sources into the Learning application.

Before you begin

Role required: sb_lc.learning_admin

Procedure

1. Navigate to **All** > **Learning** > **Content** > **External Content**.
2. Select the course item that you want to view.
3. On the Learning External Content form, view the fields.
   For a description of the field values, see Learning External Content form.

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Define user access to course within external learning content

Define user access to configure who has read access to external learning content.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Learning** > **Content** > **External Content**.
2. Open the external learning course that you want to define user access for.
3. On the Can Read tab, select **Edit**.
4. Add users who should have access to the external learning course.
5. On the Cannot Read tab, select **Edit**.
6. Add users who should not have access to the external learning course.

> **Note:** If a user is present in both Can Read and Cannot Read related lists, the Cannot Read takes precedence and the user is restricted from read access to that external learning course.

Assign topics to external content

Assign topics to external learning content in Learning.

Before you begin
Role required:sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Procedure
1. Navigate to **All** > **Content** > **External Content**.
2. Open the external learning course that you want to add assigned topics to.
3. On the Assigned Topics tab, select **Add**.
4. Select a topic to be added as connected content to the external learning course.

Add associated skills

Add associated skills to external learning content in Learning.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Content** > **External Content**.
2. Open the external learning course that you want to add assigned topics to.
3. On the **Associated skills** tab, select **New**.
4. On the form, fill in the fields.

Skill form

Field	Description
Name	Name of the skill.
Description	Detailed description about the skill.

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Field	Description
Level Type	Level type to which the skill belongs.
Active	Option to enable the skill.

5. Select **Submit**.
6. On the **Associated skills** tab, select **Edit**.
7. Add users who should have access to external learning content skills.

Create a learning library

Create a learning library that includes learning content from internal and external content repositories.

Before you begin
Role required: sn_lc.catalog_manager, sn_lc.catalog_group_manager

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Learning Libraries**.
2. Select **New**.
3. On the Learning library form, fill in the fields.
   For a description of the field values, see Learning library form.
4. Select **Submit**.

Related topics

Learning library form

Add course items to learning library

Add users to learning library

Add course items to learning library

To add course items to the catalog

Before you begin
Role required: admin

Create a learning library. For more information, see Create a learning library

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Learning Library**.
2. Select the learning library that you want to add course items to.
3. On the Content related list, select **Add**.
4. On the Select content window, select courses and click **Add selected**.

Add users to learning library

You can add applicable users to a learning library.

Before you begin
Role required: admin

Create a learning library. For more information, see Create a learning library

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Procedure

1. Navigate to **All** > **Learning** > **Content** > **Learning Library**.
2. Select the learning library that you want to add course items to.
3. On the Applicable Users related list, select **Edit**.
4. On the Edit Members window, select courses and click **Save**.

Create a learning task

Assign a learning task to an employee that can be completed from the To-dos page in Employee Center.

Before you begin
Role required: sn_lc.task_creator

Procedure

1. Navigate to **All** > **Learning** > **Tasks** > **Learning Tasks**.
2. Select **New**.
3. On the Learning task form, fill in the fields.
   For a description of the field values, see Learning task form.
4. Select **Submit**.

Related topics

Learning task form

Create an achievement definition

Create definitions for achievements to define the end goal.

Before you begin
Role required: sn_lep.achievement_manager

Procedure

1. Navigate to **All** > **Learning** > **Achievements** > **Achievement Definitions**.
2. Select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Achievement form.

Define user access for achievements

Define user access to the collection to configure who has can and can't read access to the achievements.

Before you begin
Role required: sn_lc.learning_admin, sn_lep.achievement_manager

Create an achievement. For more information, see Create an achievement definition.

Procedure

1. Navigate to **All** > **Learning** > **Achievements** > **Achievement definitions**.
2. Open the achievement that you want to define user access for.

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3. On the Can Read related list, select **Edit**.
4. Add users who should have access to the achievement.
5. On the Cannot Read related list, select **Edit**.
6. Add users who shouldn't have access to the achievement.

> **Note:** When a user is present in both Can Read and Cannot Read then Cannot Read takes precedence, and the user is restricted access to that achievement.

Add associated skills to an achievement

Add associated skills to define the scope of an achievement.

Before you begin

Role required: sn_lep.achievement_manager

Create an achievement. For more information, see Create an achievement definition.

Procedure

1. Navigate to **All** > **Learning** > **Achievements** > **Achievement definitions**.
2. Select the achievement that you want to add associated skills to.
3. On the Associated skills related list, select **Edit**.
4. Add the required skills from the collection to the associated skills list.
5. Select **Save** and **Update** the achievement definition.

Create user achievements

Create user achievements to project the accomplishments of course takers on My Learning.

Before you begin

Role required: sn_lep.achievement_manager

Procedure

1. Navigate to **All** > **Achievements** > **User Achievements**.
2. Select **New**.
3. On the form, fill in the fields.

User achievement form

Field	Description
User	User whose achievements are projected.
Achievement	Associated achievement definition.
Status	Status of the achievement: **current**, **at risk**, or**expired**.
Achieved on	Date on which the achievement is achieved.
Expiry date	Date on which the achievement is due for expiry.

4. Select **Submit**.

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Create an achievement rule

Create achievement rules to define the criteria to be met to complete an achievement.

Before you begin
Role required: sn_lep.achievement_manager

Procedure

1. Navigate to **All** > **Learning** > **Achievements** > **Achievement Rules**.
2. Select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Achievement rule form.
4. Select **Submit**.

Create an achievement rule item

Create an achievement rule item to define if all or a count of items need to be completed to receive an achievement.

Before you begin
Role required: sn_lep.achievement_manager

Create an achievement rule. For more information see, Create an achievement rule.

Procedure

1. Navigate to **All** > **Achievements** > **Achievement Rules**.
2. Open the achievement rule that you want to add an achievement rule item to.
3. In the achievement rule item section, select **New**.
4. On the form, fill in the fields.

User achievement form

Field	Description
Name	Name of the user whose achievements are projected.
Type	Status of the achievement. If it's current, at risk, or expired.
Achievement rule	The associated achievement rule.
Active	Option to indicate that the achievement rule item is available for use.
Content	Content associated with the achievement.
Order	Order in which the achievement rule item appears.

5. Select **Submit**.

Skill sensing for learning content

Skill sensing is an automated approach to identify and extract skills from the title and description of a course so that the admin can associate the skills to a course.

Plugin requirement: Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai), Learning core plugin (sn_learning_core), and Skills foundation plugin (sn_skills_int).

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You can add skills to the learning courses using skill sensing in two ways:

- Add skills at the individual course level. For more information, see Add skills to a course with skill sensing.
- Add multiple skills automatically using the skill sensing configuration or you can review the skills manually. For more information, see Configuration for bulk skill sensing and Add or discard multiple skills with skill sensing.

Add skills to a course with skill sensing

Add skills to a course manually using the Large Language Model (LLM) skills recommendations based on the title and description of the course.

Before you begin

Role required: Learning admin

Plugin requirement: Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai), Learning core plugin (sn_learning_core), and Skills foundation plugin (sn_skills_int).

Note: Manual skill recommendation works for Internal courses, external courses, exams and assessments. The recommendations don't work for Paths and collections.

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Internal content/External content**.
2. Select a course for which you want to add skills.
3. Select **Add skills**.
4. Select **Get recommendations**.
   - The skills recommended are populated from the Review skills recommendation table based on the title and description of the course.
   - The existing skills that are tagged to a course are not recommended again.
   - The **Get recommendations** option is displayed only when you are adding skills to a course for the first time. From the next time onwards, the **Refresh recommendations** option is displayed.
5. In the Recommended skills list, select **Add** to add the skill, and **Discard** to reject the skill.
   - Skills once discarded are not recommended again unless manually deleted from the Recommended skills list.
   - The discarded skills are in the Review skills recommendation table in the Rejected state. You can manually restore the skills status from this table.
6. In the Selected skills list, you can see the skills that are added also change the level type of a skill.
7. In the Search for a skill field, type in a skill name and add it to the selected skills list.
   You cannot add the skills that are already in the Selected skills list.
8. Select **Add skill(s)** to confirm the selection.
   Only after you select the Add skills(s) option, the changes are saved.

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Result

- The added skills are linked to the course and displayed in its Associated skills list. They are also stored in the Course item skills table (sn_lc_course_item_m2m_cmn_skill) and removed from the Review skills recommendation table.
- Discarded skills move to the Review skills recommendation table with a Rejected status. You can later change their status to Pending or Accepted.

Configuration for bulk skill sensing

Define conditions to create a sub set of learning courses on which you can run the scheduled job enabling you to accept multiple recommended skills.

Before you begin

Role required: Learning admin

Plugin requirement: Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai), Learning core plugin (sn_learning_core), and Skills foundation plugin (sn_skills_int).

Procedure

1. Navigate to **All** > **Learning** > **Learning Skill Recommendations** > **Skill Sensing Configuration**.
2. Select **New**.
3. On the form, fill in the fields.

Skill Sensing Configuration form

Fields	Description
Table	The table from which the courses are extracted.
Condition	Use the **Add Filter Condition** option to refine the learning courses for the condition types that are set. All the learning courses that meet this condition receive skill recommendations. **Note:** ○ The trigger conditions are based on Learning Course items (internal courses, external courses, and exams). ○ If there are no records matching the condition, you cannot generate the recommended skills.
Exclude courses below minimum skills count	Filter the learning courses that already have a specific number (Minimum skills count) of skills tagged. For example, if the Minimum skill count is three, the courses that have three skills or above are not considered.
Exclude courses that already have recommended skills	Omits the learning courses that already have skills recommended by Large Language Model (LLM).

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Fields	Description
Include active courses with recent learner activity	Include learning courses that have any recent activity like a course being assigned, started, in-progress. Note: Apart from the filter conditions, the above three fields can be used to further filter the courses.
Active	Make the configuration active. **Note:** Only one skill sensing configuration must be active at a given point.
Description	A description for the configuration.

4. Select **Submit**.
5. Select **Generate recommended Skills** to generate skills recommendations.

   Note: If you don't have the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai) installed, the **Generate recommended Skills** option is not displayed.

6. Select **Proceed** to create the records in the Review skills recommendation table.

   Note: If the system property sn_lc.auto_accept_llm_recommendations is set to True, all the recommended skills are automatically accepted and added to the Course item skills table (sn_lc_course_item_m2m_cmn_skill). The skills will also be linked to the respective learning courses based on the table mapping. By default, this property is set to False.

   .

Add or discard multiple skills with skill sensing

Review and approve the Large Language Model (LLM) recommended skills before tagging them to the learning courses.

Before you begin

Role required: Learning admin

Plugin requirement: Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai), Learning core plugin (sn_learning_core), and Skills foundation plugin (sn_skills_int).

Procedure

1. Navigate to **All** > **Learning** > **Learning Skill Recommendations** > **Review Skill Recommendations**.
   - All recommended skills from learning courses are shown, including those in Pending and Rejected states, listed in the order they were imported.
   - The Source column shows where the skills originated: LLM for AI-generated skills and NULL for skills created manually.
2. Select the skills that you want to accept.
3. Select the **Actions on selected rows** drop-down.

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- Select **Accept skills** to approve the skills.
- Select **Reject skills** to decline the skills.

Note: Skills in the Pending state are deleted six months after their creation, while skills in the Rejected state are deleted nine months after the created date.

4. Select **Proceed** to accept the selected skills.
   The selected skills are added to the Course item skills table (sn_lc_course_item_m2m_cmn_skill) and linked to the relevant learning courses. They are then removed from the Course Item Recommended Skills list.

Reporting solutions for Learning

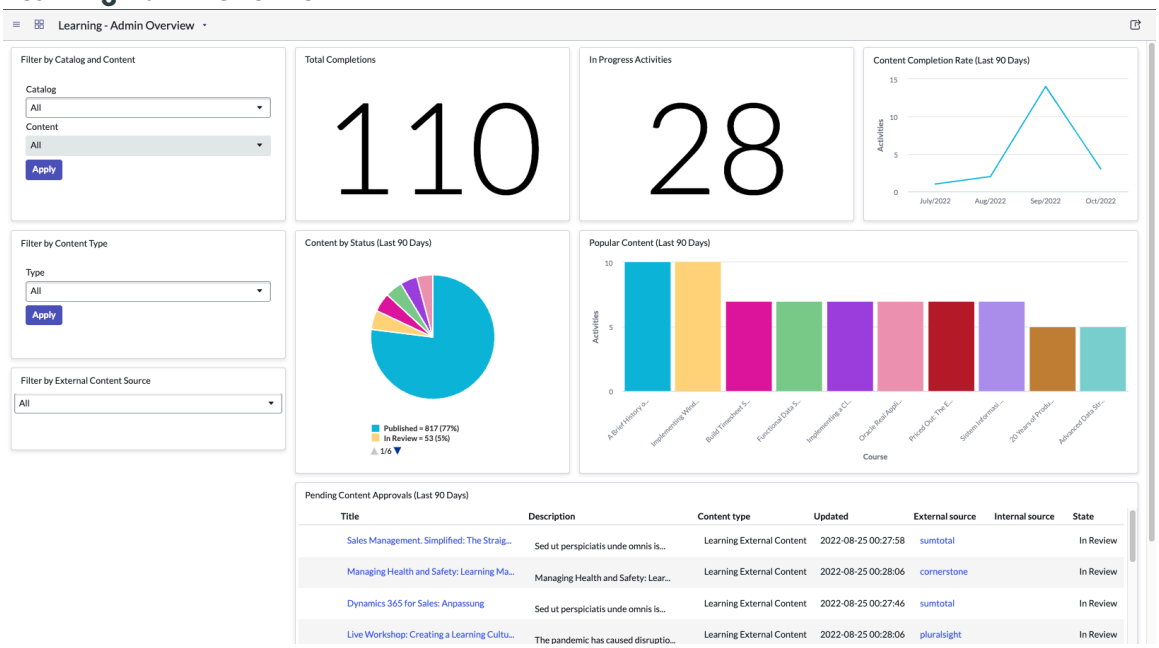
Learning comes with the following dashboards that project targeted reports to provide consolidated data on all user activities that help measure the success of learning content.

Learning admin overview dashboard

Learning admin overview dashboard provides the learning administrator with a consolidated report on user course activities.

The Learning Admin Overview dashboard provides the learning administrator (sn_lc.learning_admin) with helpful information of the overall activity on the Learning application.

Learning Admin Overview



Learning catalog overview

Learning catalog overview dashboard provides the learning catalog manager with a detailed view of the user activities.

The Learning Catalog overview dashboard gives a bird's eye view of all the learning activity of the users to the Catalog manager.

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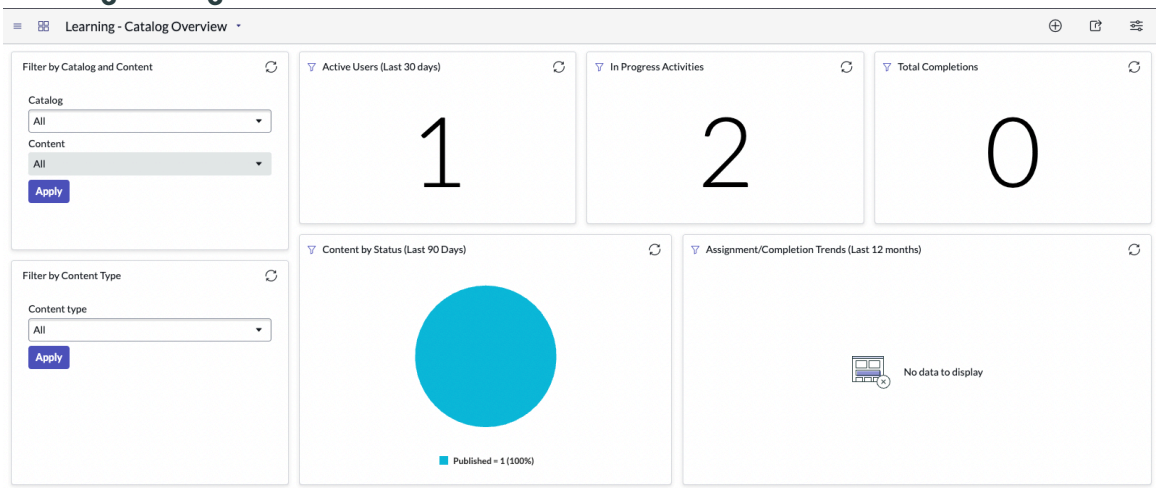
Learning Catalog Overview

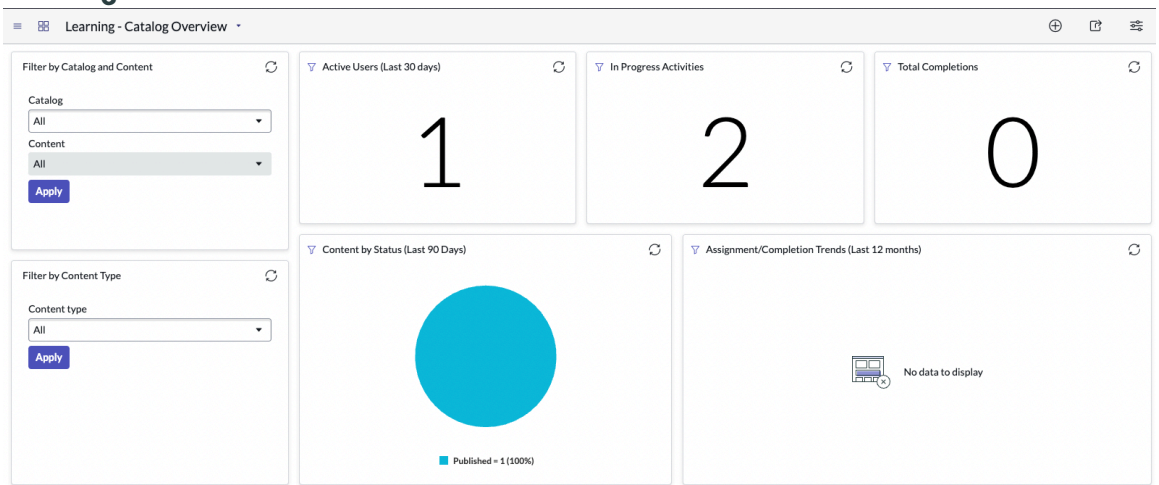


Learning content author overview dashboard

Learning content author overview dashboard provides a detailed report of user activities to the content author.

Learning content author dashboard is also shared with the Learning admin.

Learning content author dashboard



Learning reference

All information regarding the system properties and tables installed with learning experience are listed here.

Collection form

Use the Collection form to create a content collection in Learning Core to dynamically group Learning content that includes multiple internal and external courses.

Collection form

Field	Description
Title	Name of the collection.

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Collection form (continued)

Field	Description
Course catalog	Course catalog associated with the collection.
Level	The difficulty level of content in the collection. • **Beginner** • **Intermediate** • **Advanced**
Course type	The type of content in the collection. • **Collection** • **Path**
State	Current state of the collection.
Active	Option to enable the collection. When this check box is selected, the collection can be accessed by users.
Image	Image associated with the collection.
Estimated duration	Estimated duration of the collection in days, hours, minutes, and seconds.
Details	
Short description	Brief description about the collection.
Description	Detailed description about the collection.
Approval	Approval status of the collection.
Audience	
Non discoverable	Option for the visibility of the collection. When this check box is selected, the collection doesn't appear in the search results on the Learning portal. Every collection is discoverable by default.
Metrics	
Average rating	Average rating of content in the collection.
Release Lifecycle	
Published	Published date of the collection.
Planned publish date	Scheduled publish date of the collection.
Valid until	Retirement date of the collection.

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Learning internal content form

Use the Learning internal content form to create internal Learning courses so that employees can learn new content and enhance their skills set.

Learning Internal Content form

Field	Description
Internal source	Type of Learning content that is created. • **Knowledge article** • **URL** • **Free form** • **Quiz**
Knowledge Article	Knowledge article to be included in theLearning content. This field is available only when **Knowledge article** is selected from the **Internal source** field.
URL Domain	Link to be included in internal Learning content. • **Youtube** • **Vimeo** • **Other** This field is available only when **URL** is selected from the **Internal source** field.
URL	URL for the selected domain. This field is available only when **URL** is selected from the **Internal source** field.
Title	Title of the Learning content.
Course catalog	Course catalog associated with the internalLearning course.
Level	Level of complexity of the Learning content.
State	Current state of the internal Learning course.
Author	Name of the user who created the Learning content.
Days to expire	Number of days before the content expires.
Active	Option to indicate that content is available for use.
Estimated duration	Total duration of the course content in days and hours. For example, for a video, it's the duration of the video. For a Knowledge article, the duration is estimated based on the length of the article.
Image	Image associated with the internal Learning course.
Details	

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Learning Internal Content form (continued)

Field	Description
Short description	Brief description of the internal content.
Description	Full description of the internal content.
Objective	End goal of the internal content being created.
Audience	
Non discoverable	Determines if the course is discoverable by the audience. If a course is non-discoverable, it can't be assigned and doesn't appear in the search results on the portal.
Metrics	
Average rating	Rating given to the content.
Release Lifecycle	
Published	Published date of the internal content.
Planned publish date	Date when the internal content is due for publishing.
Valid until	Date until when the internal content is valid.

Learning External Content form

Description of the field values in the Learning External Content form.

Learning External Content form

Field	Description
Title	Title of the content that is pulled from a third-party learning system.
Correlation ID	Unique identifier for the course item that is generated from an external system.
External source	Name of the external learning system that the course item is pulled from.
Active	Option that indicates that the course item is active and available to use.
Mobile deeplink	Deeplink that is generated from an external system. Deeplink enables you to navigate to a course from a native application.
URL	URL used to open the course item on an external system.
Description	Description of the course item that is pulled from an external learning system.
Type	Type of service (OnDemand Push or Scheduled Pull) that interacts with an external learning system.
Updated	Date and time when the course item was last updated.
Estimated duration	Estimate of the total time that is taken to complete the course item.

Learning library form

Use the learning library form to create a learning library.

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Learning Library form

Field	Description
Title	Name of the catalog.
Active	Option to indicate that the catalog is available for use.
Applicable to groups	Option to enable the assignment of course to groups. **Note:** This field is applicable only to WFO/Coaching application.
Description	Description of the catalog.
Manager Access Restrict To	Employees that the catalog is visible to or employees who can curate the items in the catalog. **Note:** This field appears only when **User criteria** is selected in the **Restrict Type** field.

Learning task form

Assign a learning task to an employee that can be completed from the To-dos page in Employee Center.

Learning task form

Field	Description
Number	Unique identifier of the learning task.
Assigned to	User to whom you want to assign the learning task.
Learning Library	Name of the learning library that is assigned via the learning task.
Course Item	Name of the course item that is assigned via the learning task.
Optional	Option to make the learning task non-mandatory.
State	Current state of the task.
Due date	Date by which the assignee must complete the learning task.
Opened by	Name of the user who has created the learning task.
Short description	Additional details of the learning task.

Achievement form

Create achievement definitions to associate them with courses.

Achievement form

Field	Description
Name	Name of the achievement definition.
Image	Relevant images that you attach to support the achievement.
Course catalog	Associated course catalog for the achievement definition.
Type	The type of achievement definition.

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Achievement form (continued)

Field	Description
	• **Certification** • **Badge**
Expires	The achievement expires after a certain period of time.
Description	Description of the achievement received.

Achievement rule form

Create achievement rules to define the criteria to be met to complete an achievement.

Achievement rule form

Field	Description
Name	Name of the achievement rule.
Achievement	Associated achievement of the achievement rule.
Active	Whether the achievement rule is active or not.
Order	Order in which the achievement appears.
Completion requirement	Completion of an achievement. If all items, or count of items is required.
Item count	Number of items required to be completed to gain an achievement. This field is available only when **Count of items** is selected from the **Completion requirement** field.
Description	Description of the achievement rule.

Learning course catalog form

Use the course catalog form to create a new learning course catalog.

Learning Course catalog form

Field	Description
Title	Name of the catalog.
Owner	The owner of the course catalog.
Publish flow	Flow for publishing the course. Use **Insta publish flow** for immediate publishing of course catalogs.
Retire flow	Flow for publishing the course. Use **Insta retire flow** for immediate retirement of course catalogs.
Description	Description of the catalog.
Management	
Admins	Suitable administrator role for the course catalog.
Content properties	

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Learning Course catalog form (continued)

Field	Description
Extension duration (days)	Number of days until which any course within the catalog can be extended.
Pending retirement duration (days)	Number of days remaining for the course to retire.

Life-cycle stages of a content collection in Learning Core

The State transition of a collection guides you through the stages of its life cycle.

Collection life-cycle stages

Life-cycle stage status	Description
Draft	Default value for a new collection.
In Review	Collection that is pending review.
Scheduled for Publish	Collection that is scheduled for publish.
Published	Collection that is published.
Pending Retirement	Collection that is pending for retirement.
Retired	Collection that is retired.

Components installed with Learning

Several types of components are installed with the activation of Learning, including tables, user roles, and scheduled jobs.

Roles installed

Roles in Learning

Role title	Description	Contains roles
sn_lc.learning_admin	Sets up Learning application configurations. Performs all the actions in the application. Possesses CRUD access for all tables.	sn_lc.learning_admin
sn_lc.catalog_group_manager	Manages catalogs and catalog groups on Learning application.	sn_lc.catalog_group_manager
sn_lc.learning_manager	Sets up Learning application configurations. Performs all the actions in the application. Possesses CRUD access for all tables.	sn_lc.learning_manager
sn_lc.catalog_manager	Manages catalogs on Learning application.	sn_lc.catalog_manager

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Roles in Learning (continued)

Role title	Description	Contains roles
sn_lc.task_creator	Responsible for creating learning tasks on Learning application.	sn_lc.task_creator
sn_lep.achievement_manager	Creates and manages achievements on Learning application.	sn_lep.achievement_manager

Tables installed

Tables installed with Learning

Table	Description
Achievement [sn_lep_achievement]	Stores details of all achievements configured on Learning.
User achievement [sn_lep_user_achievement]	Stores information of all user achievements on Learning.
Achievement rule [sn_lep_achievement_rule]	Defines the rules to define achievements on Learning.
Achievement rule item [sn_lep_achievement_rule_item]	Stores information of all the achievement rules on Learning.
Achievement skill [sn_lep_m2m_achievement_skill]	Maps the achievements to the associated skill.

Career Assessment

The Career Assessment application works as an exam engine that provides the ability to create exams that help with career advancement and help test a learner's knowledge of a subject.

Career Assessment is a test taking application that enhances the learning experience of users in Career Assessment. Career Assessment offers a unique user experience. In the back-end, learning administrators create exams and learning paths using Career Assessment to create customized learning journeys for users.

Explore	Configure
	
Learn how Career Assessment helps facilitate career progression	Configure Career Assessment

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Use	Reference
	
Learn how to use Career Assessment	Get details about components like roles, fields, tables, and properties

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Career Assessment

Explore the features of Career Assessment.

Activating application

You can activate the Career Assessment from the ServiceNow store. This application includes demo data and activates related plugins if they aren't already active.

Note: Career Assessment is available with the Employee Center application. Some of the features of Learning work only when the HR Service Delivery and Employee Journey Management applications are activated.

Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Licensing

Career Assessment leverages the new Talent Development licensing module. This licensing feature allows registered ServiceNow applications to grant users licenses for the apps based on employee profile and other additional criteria.

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Configuring data

Career Assessment comes with optional demo data.

For more information, see Configuring Career Assessment and Career Assessment reference.

Using Career Assessment in Employee Center

Use Career Assessment to get a better understanding of your learnings. Act on items that need immediate attention, keep yourself up to date on upcoming content items and assessments.

For more information, see Using Career Assessment.

Career Assessment integration with Learning

Career Assessment integrates with Learning to improve assessment based learning. Learners can track their learnings and assess their knowledge using the quizzes available for different courses that they take on My Learning.

For more information, see Using My Learning.

Configuring Career Assessment

Configure Career Assessment by setting up the following.

Allow RCAs

After you install Career Assessment, you might encounter Restricted Caller Access (RCA) approval messages requesting an update in the access request. Allow the following RCAs:

- Target Human Resources Core
- Target Journey Accelerator
- Target Journey Designer

Using Career Assessment

Use Career Assessment to create exams.

Create exam catalogs

Create exam catalogs to be able to segregate exams based on category.

Before you begin
Role required: sn_exam.catalog_admin

Procedure

1. Navigate to **All** > **Career Assessment** > **Exam Catalogs** > **Create New**.
2. On the form, fill in the fields.

Exam catalog form

Field	Description
Name	Name of the exam catalog.
Admins	Option to select administrators for the exam catalog.
Owner	Person who owns the exam catalog.

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Field	Description
Description	Description of the contents of the exam catalog.

3. Select **Submit**.

Define user access for an exam catalog

After creating an exam catalog, define user access criteria at the exam catalog level.

Before you begin

Role required: sn_exam.catalog_admin

Users configured as part of the admin list, can contribute user criteria or owner of the associated catalog can define user access for the catalog.

Create an exam catalog. For more information, see Create exam catalogs.

Procedure

1. Navigate to **All** > **Career Assessment** > **Exam Catalogs** > **All**.
2. Open the exam catalog that you want to define user access for.
3. On the Can Read tab, select **Edit**.
4. Add users who should have access to the exam catalog.
5. On the Cannot Read tab, select **Edit**.
6. Add users who should not have access to the exam catalog.

   Note: If a user is present in both Can Read and Cannot Read related lists, the Cannot Read takes precedence and the user is restricted from read access to that exam catalog.

7. Select **Save**.
8. On the Can Contribute tab, select **Edit**.
9. Add users who can contribute to the exam catalog.
10. Select **Save**.
11. On the Cannot Contribute tab, select **Edit**.
12. Add users who cannot contribute to the exam catalog.
13. Select **Save**.

Add exams to a catalog

Add exams to an exam catalog in Career Assessment.

Before you begin

Role required: sn_exam.catalog_admin

Create an exam catalog. For more information, see Create exam catalogs.

Procedure

1. Navigate to **All** > **Career Assessment** > **Exam Catalogs** > **All**.
2. Open the exam catalog that you want to add exams to.
3. On the Exams tab, select **New**.

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4. On the form, fill in the fields.
   For a description of the field values, see Exam form.
5. Select **Submit**.

Create an exam

Create an exam on Career Assessment.

Before you begin
Role required: sn_exam.catalog_admin

Users configured as part of the admin list, can contribute user criteria or owner of the associated catalog can create exams.

Procedure

1. Navigate to **All** > **Career Assessment** > **Exams** > **Create New**.
2. On the form, fill in the fields.
   For a description of the field values, see Exam form.
3. Select **Submit**.

Result
The exam is created in Draft state.

Note: The exam may only be published when it contains at least one question and two options with the required number of options marked as correct.

What to do next
Add questions to an exam. See, Add questions to an exam.

Add questions to an exam

Add questions for an exam in Career Assessment.

Before you begin
Role required: sn_exam.catalog_admin

Users configured as part of the admin list, can contribute user criteria or owner of the associated catalog can add questions for an exam.

Create an exam. See, Create an exam.

Procedure

1. Navigate to **All** > **Career Assessment** > **Exams** > **All**.
2. Select the exam you want to add questions to.
3. Select **Move to Edit** if the exam is in Published state.
4. In the questions section, click **New**.
5. On the form, fill in the fields.
   For a description of the field values, see Question form.
6. Select **Submit**.

What to do next
Add options to a question. See, Add options to a question.

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Add options to a question

Add options for a question on Career Assessment.

Before you begin

Role required: sn_exam.catalog_admin

Users configured as part of the admin list, can contribute user criteria or owner of the associated catalog can add options for questions in an exam.

Create an exam. See, Create an exam.

Create a question. See, Add questions to an exam.

Procedure

1. Navigate to **All** > **Career Assessment** > **Exams** > **All**.
2. Select the exam you want to add questions to.
3. Select **Move to Edit** if the exam is in Published state.
4. Select the question you want to add options to.
5. In the question options section, select **New**.
6. On the form, fill in the fields.
   For a description of the field values, see Question option form.
7. Select **Submit**.

Add exams to a learning path from Career Assessment

Create internal learning content to add exams as content items within a learning path from Career Assessment.

Before you begin

Role required: sn_lc.catalog_manager

Procedure

1. Navigate to **All** > **Learning** > **Content** > **Internal Content**.
2. Select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Learning internal content form.
4. Select **Submit**.

Related topics

Learning internal content form

View an exam instance

View an exam instance to verify number of attempts, scores and completion status of an exam assigned to a user.

Before you begin

Role required: sn_exam.admin, sn_exam.catalog_admin, user

Only a user with the sn_exam.catalog_admin role who is configured as part of the admin list or is an owner of the catalog may view an exam instance within the associated catalog. Users assigned to the exam may also view associated exam instances.

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Procedure

1. Navigate to **All** > **Career Assessment** > **Exams** > **Exam Instances**.
   The following modules are available based on the state of the instances.
   - **All**: Displays exam instances in all states.
   - **Assigned**: Displays exam instances that are yet to be attempted.
   - **In Progress**: Displays exam instances that are in progress.
   - **Complete**: Displays exam instances that are complete.
2. Select the exam instance number that you want to view from the required module.
3. Review the fields of the form.
   For a description of the field values, see Exam instance form.

View number of exam instance attempts

View number of exam instance attempts by a user.

Before you begin

Role required: sn_exam.admin, sn_exam.catalog_admin, user

Only a user with the sn_exam.catalog_admin role who is configured as part of the admin list or is an owner of the catalog may view an exam instance within the associated catalog. Users assigned to the exam may also view associated exam instance attempts.

Procedure

1. Navigate to **All** > **Career Assessment** > **Exams** > **Exam Instances**.
   The following modules are available based on the state of the instances.
   - **All**: Displays exam instances in all states.
   - **Assigned**: Displays exam instances that are yet to be attempted.
   - **In Progress**: Displays exam instances that are in progress.
   - **Complete**: Displays exam instances that are complete.
2. Select the exam instance number that you want to view from the required module.
3. Select the exam instance attempt number that you want to view.
4. Review the fields of the form.
   For a description of the field values, see Exam instance attempt form.

Career Assessment reference

All information regarding the system properties and tables installed with Career Assessment are listed here.

Components installed with Career Assessment

Several types of components are installed with the activation of Career Assessment, including tables, user roles, and scheduled jobs.

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System properties

Career Assessment system properties

Property	Description
sn_lep.show_exam_guidelines	Property to show the exam guidelines pop-up before the user starts the quiz.

Roles installed

Roles installed with Career Assessment

Role title	Description	Contains roles
sn_exam.admin	Sets up Career Assessment application configurations.	sn_exam.admin
sn_exam.catalog_admin	Creates and administers catalogs on Career Assessment.	sn_exam.catalog_admin

Tables installed

Tables installed with Career Assessment

Table	Description
Exam Catalog [sn_exam_catalog]	Stores all catalogs created on Career Assessment.
Exam [sn_exam_exam]	Stores information on all exams on Career Assessment.
Exam Instance [sn_exam_instance]	Stores all exam instances on Career Assessment.
Exam Instance Attempt [sn_exam_instance_attempt]	Stores all exam instance attempts on Career Assessment.
Exam Catalog Cannot Contribute [sn_exam_m2m_catalog_cannot_contribute]	List of users who cannot add exams to an exam catalog on Career Assessment.
Exam Catalog Cannot Take [sn_exam_m2m_catalog_cannot_take]	List of users who cannot attempt exams in an exam catalog on Career Assessment.
Exam Catalog Can Contribute [sn_exam_m2m_catalog_can_contribute]	List of users who can add exams to an exam catalog on Career Assessment.
Exam Catalog Can Take [sn_exam_m2m_catalog_can_take]	List of users who can attempt exams in an exam catalog on Career Assessment.
Question [sn_exam_question]	Stores questions in an exam on Career Assessment.
Question option [sn_exam_question_option]	Stores options for questions in an exam on Career Assessment.
Exam Question Response [sn_exam_question_response]	Stores responses for questions in an exam on Career Assessment.

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Exam form

Use the Exam form to create an exam.

Exam form

Field	Description
Name	Name of the exam.
Catalog	Associated exam catalog.
Duration	Estimated time of the exam.
Reattempt wait time	Amount of wait time before a user can retake the exam.
State	Current state of the exam.
Owner	Person who owns the exam.
Active	Option for ensuring the use of the exam.
Description	Description of the contents of the exam.
Contents	
Instructions	Steps to follow while attempting the exam.
Pass message	Message that appears after successfully completing the exam.
Fail message	Message that appears when the taker fails to achieve the minimum score to pass the exam.
Results	
Passing percentage	Minimum percentage required to pass the exam.
Randomize questions	Option to allow questions to appear in random order.

Question form

Description of the field values in the Question form.

Question form

Field	Description
Question	The question displayed in the exam.
Active	Option to enable the question. When the active option is selected, the question is visible to users when they attempt the exam.
Exam	Exam associated with the question.
More information	
Type	Format of options for the question.

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Question form (continued)

Field	Description
	• **Choice** • **Multi select**
Score	Number of marks allotted to the question.
Order	The position in which the question appears in the questions sequence.

Question option form

Description of the field values in the Question option form.

Question Option form

Field	Description
Name	The option displayed for the question.
Order	The position in which the option appears in the options sequence.
Question	Question associated with the option.
Correct answer	Desired answer for a question. When the checkbox is selected, the option will be registered as the correct answer for a scored question.
Active	Enables use of the option. When the checkbox is selected, the option can be viewed by users.

Learning internal content form

Use the Learning internal content form to add exams as content items within a learning path from Career Assessment.

Learning internal content form

Field	Description
Internal source	Type of learning content that is created. Select **Quiz** to add an exam to the learning path.
Quiz	Exam to be added to the learning path. This field is available only when **Quiz** is selected from the **Internal source** field.
Title	Title of the learning content.
Course catalog	Course catalog associated with the internal learning course.
Level	Level of complexity of the learning content.
State	Current state of the internal learning course.

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Learning internal content form (continued)

Field	Description
Author	Name of the user who created the learning content.
Days to expire	Number of days before the content expires.
Active	Option to indicate that content is available for use.
Estimated duration	Total duration of the course content in days and hours. For example, for a video, it is the duration of the video. For a Knowledge article, the duration is estimated based on the length of the article.
Image	Image associated with the internal learning course.
Details	
Short description	Brief description of the internal content
Description	Full description of the internal content.
Objective	End goal of the internal content being created.
Audience	
Non discoverable	Determines if the course is discoverable by the audience. If a course is non-discoverable, it cannot be assigned and will not appear in the search results on the portal.
Metrics	
Average rating	Rating given to the content.
Release Lifecycle	
Published	Published date of the content.
Planned publish date	Date when the internal content is due for publishing.
Valid until	Number of days until the content is valid.

Exam instance form

Description of the field values in the Exam Instance form.

Exam Instance form

Field	Description
Number	System-generated unique exam instance number.
Assigned to	Name of the user assigned to the exam instance.
Score	Latest marks obtained by the user.
Score percent	Percentage of latest marks obtained by the user.
Exam	Name of the exam associated with the exam instance.
State	Current state of the exam instance.
Result	Pass or fail status of the exam instance.
Current completed attempts	Number of attempts completed currently.

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Exam Instance form (continued)

Field	Description
Reattempt time	Wait time before the next attempt.

Exam instance attempt form

Description of the field values in the Exam instance attempt form.

Exam instance attempt form

Field	Description
Number	System-generated unique exam instance attempt number.
Attempt number	Current attempt number of the exam.
Total questions	Total number of questions in the exam.
Correct questions	Total number of questions answered correctly by the user.
Score	Latest marks obtained by the user.
Score percent	Percentage of latest marks obtained by the user.
Exam instance	Exam instance number associated with the exam instance attempt.
State	Current state of the exam instance attempt.
Result	Pass or fail status of the exam instance attempt.
Start time	Start time of the exam instance attempt.
End time	End time of the exam instance attempt.
Current Position	Position user was in before quitting the exam instance attempt. • Question order • **review** • **score**

Mentoring

The ServiceNow® Mentoring application is a platform that connects individuals seeking mentorship with experienced mentors. It creates a seamless experience for both mentees and mentors.

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Mentoring has the following features:

Enrollment

Employees can choose to enroll as either a Mentee/Mentor or as both roles by indicating their enrollment preferences – skills, focus areas and other preference for mentorship. For more information, see Enroll as a mentor or mentee.

Skills Preferences

Mentees can choose skills as of one of their Mentorship enrollment preferences. Mentors can choose skills that they can provide mentorship assistance. For more information, see Search and add skills.

Suggested Mentors

Enrolled Mentees can instantly view Mentor suggestions based on their enrollment preferences and also view additional match insights & mentor expertise to be able to choose an appropriate mentor. For more information, see View suggested mentors.

Mentor Search

Employees can search for mentors by name, job profile. They can also use additional filters to search from the list of mentors.

For more information, see Search for a mentor.

Match Insights Card

Employees, both mentees and mentors can view the match insights based on the match score calculated based on the skills and preferences set by them. For more information, see View match insights.

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Get started

Explore  Learn about Mentoring features	Configure  Install and configure Mentoring
Use  Employees can enroll as mentors or mentees	Reference  Get details about components like fields and properties

Additional resources

- Log in to your ServiceNow® account and find additional information about implementing and deploying Mentoring features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Employee Service Management users at Now Community.

Exploring Mentoring

The Mentoring application provides the opportunity for employees to find and build meaningful mentoring relationships to drive employee growth and engagement.

How mentors and mentees are matched

The matching system facilitates high-quality, relevant connections by prioritizing the specific needs of the mentee, while ensuring the mentor is both qualified and willing to provide guidance in those area.

To establish a successful match, both mentors and mentees first complete comprehensive profiles. The system then utilizes a weighted scoring engine to recommend mentors by calculating how effectively their profiles align with a mentee's professional experience and expressed preferences. The system considers the following characteristics when assessing these skills-based matches:

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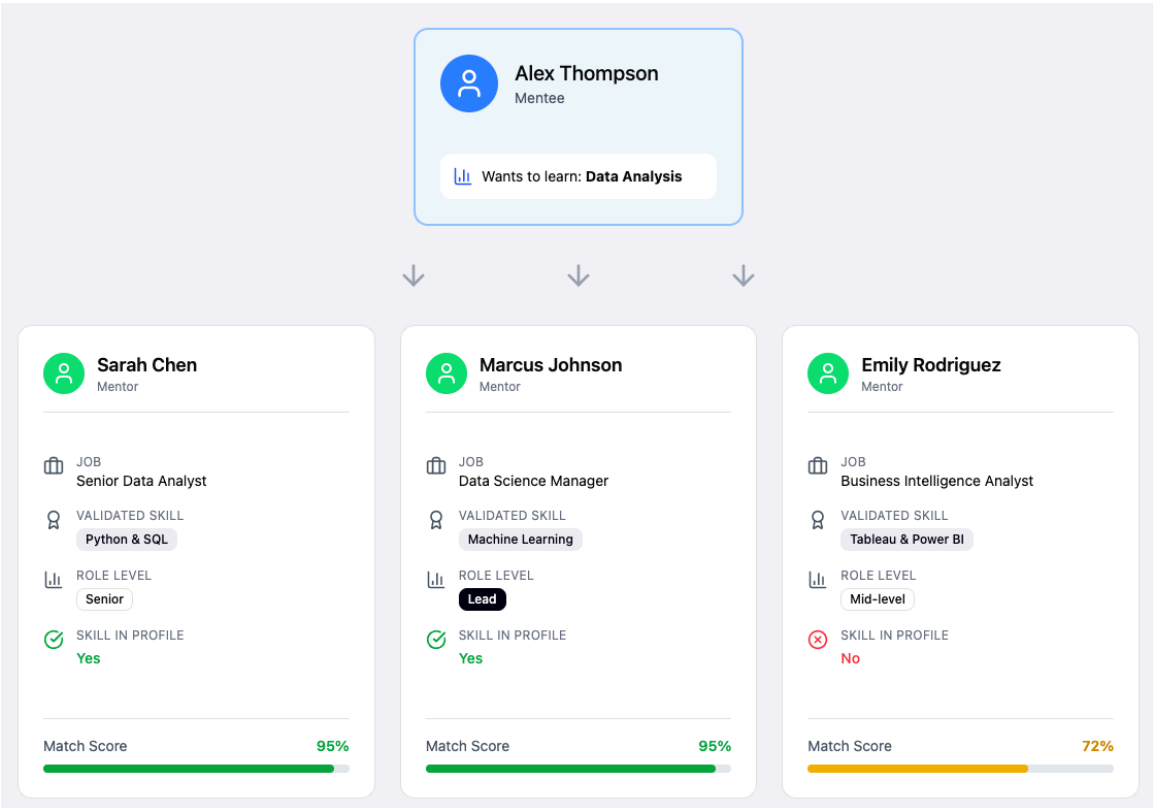
- **Skill Proficiency**: The algorithm prioritizes a high-quality learning experience by comparing the mentor's expertise against the mentee's needs. Mentors who meet or exceed the required proficiency levels are favored, while matches with under-qualified individuals are discouraged.
- **Skill Validation**: To ensure the integrity of the guidance provided, the system boosts the score for mentors with validated expertise. It relies on a history of verified skills to confirm capability and adjusts the score downward for skills that have not yet been assessed.
- **Role-Based Relevance**: The engine assesses whether a skill is a core component of the mentor's current professional function. Matches are strengthened when the skill is a requirement of the mentor's role, ensuring that the knowledge being shared is grounded in current, real-world practice.
- **Mentorship Preference**: As the most critical factor in the match, the system places heavy emphasis on the mentor's desire to teach. Even if a mentor is highly qualified and uses a skill in their daily role, they will be significantly less likely to be matched for that skill unless they have explicitly listed it as a topic they are interested in teaching

Weighted Skill-Matching Simulation: Mentee to Potential Mentors

In the simulation below, a mentee is matched to mentors based on profile attributes, demonstrating that even with a relevant job role and validated skills, the lack of explicit intent to teach results in a lower match score.



The system prioritizes mentorship intent to ensure mentees are connected with both subject matter experts and willing educators. Even if a mentor is qualified in a specific area, the matching algorithm prioritizes those who have explicitly listed that topic as a skill they are eager to teach. This ensures that matches are determined not just by a mentor's capability, but by their active desire to provide guidance in a particular field.

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Activating application

You can activate the Mentoring from the ServiceNow store. This application includes demo data and activates related plugins if they aren't already active.

Note: Mentoring is available with the Employee Center application. Some of the features of Mentoring work only when the Career Conversations application is activated.

Request apps on the Store

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Configuring data

Mentoring comes with optional demo data.

For more information, see Configuring mentoring and Mentoring reference.

Using Mentoring

Use Mentoring to get a better understanding of your learnings. Act on items that need immediate attention, keep yourself up to date on upcoming content items, courses, and so on.

For more information, see Using Mentoring.

Skills Foundation integration with Mentoring

Mentoring integrates Skills Foundation to skill based recommendations for a mentor/mentee.

Mentoring home page

Mentoring home page provides you with a bird's eye view of all your mentorship relationships, requests, and programs.

Mentoring Overview tab

The Overview tab is the first thing you see when you access Mentoring after navigating from Employee Center. Use this tab to view your current mentorships, mentorship requests, suggested mentors, and learn more about mentorship.

Your mentorships

Use the **Your mentorships** tab to find trending courses across your organization. You can browse through highlighted content promoted by the learning team, popular learning-related searches, and recommended content based on learners similar to you.

Configuring mentoring

Configuring Mentoring.

Before you begin
Install dependent plugins and apps for Mentoring.

Role required: sn_ecn.mentoring_admin

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About this task
When an administrator installs the Mentoring app from the ServiceNow store, it integrates learning, skills identification, aspirations, and planning for a personal career growth and development plan.

Procedure
1. Go to the ServiceNow Store and find the application using the filter criteria and search bar.

   In the list next to the **Install** button, the versions that are available to you're displayed.

2. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. If demo data is available and you want to install it, select the **Load demo data** check box.

   Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

5. Select **Install**.

What to do next
Allow RCAs

After you install Mentoring you might encounter Restricted Caller Access (RCA) approval messages requesting an update in the access request. Allow the following RCAs:

- Target Human Resources Core
- Target Journey Accelerator
- Target Journey Designer

Dependencies

The Mentoring application depends on other applications such as Career Conversations and Employee Profile.

Create a Mentoring program

Create customized mentoring programs that can be adopted by a mentee.

About this task
Mentoring admins can create multiple mentoring programs. Employees and managers use the Employee Center portal to enroll as mentors or mentees. See, Enroll as a mentor or mentee.

Before you begin
Role required: sn_ecn.mentoring_admin

Procedure
1. Navigate to **All** > **Mentoring** > **Programs**.
2. Select **New**.
3. On the form, fill in the fields.

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Mentoring programs form

Field	Description
Name	Name of the program.
Minimum duration	The minimum number of moths that the mentoring program lasts.
Maximum duration	The maximum number of months that the mentoring program lasts.
Default duration	The default number of months that the mentoring program lasts.
User criteria	Records that contain lists of users that can participate in a mentoring program. See, Create User Criteria Records.
Auto complete overdue mentoring	When selected, a mentoring program is automatically closed when it's overdue.
Auto complete grace period	The number of months to wait before auto-completing overdue program.
Short description	A brief description of a mentoring program that is visible in the UI that lists the program.
Description	A longer more detailed description of the mentoring program.

4. Select **Submit**.

Add a new Mentoring participant

As a manager, add members from your team either as mentors or mentees to participate in mentoring programs.

About this task

Managers with the appropriate roles add mentors and mentees to mentoring programs from the ServiceNow platform.

Before you begin

Role required: sn_ecn.mentoring_admin

Procedure

1. Navigate to **All** > **Mentoring** > **Participants**.
2. Select **New**.
3. On the form, fill in the fields.

Mentoring participant form

Field	Description
Employee	Name of the employee you want to add as a participant.
Program	Name of the program that you want to add the participant to. You can select from the list of available programs. Your employee must meet the user criteria assigned to the program.
Type	Type of participant ○ **Mentor** ○ **Mentee**

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Field	Description
State	State of the participant. ○ **Draft** ○ **Enrolled** ○ **Unavailable**

4. Select **Submit**.

Create a Mentoring relationship

As a manager, create a mentoring relationship between two of your employees.

Before you begin

Role required: sn_ecn.mentoring_admin

Procedure

1. Navigate to **All** > **Mentoring** > **Relationships**.
2. Select **New**.
3. On the Mentoring relationship form, fill in the fields.

   For a description of the field values, see Mentoring relationship form.
4. Select **Save**.

Using Mentoring

Employees can participate as mentors or mentees from the Employee Center.

Enroll as a mentor or mentee

Enroll as a mentor or mentee to learn from your peers in new ways.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring**.
2. Select **Get started**.
3. Select one from the following options:
   - I want to be a mentee
   - I want to be a mentor

   Note: You can do both, but you will have to enroll as a mentee and mentor separately.
4. Select **Next** and answer the questions that appear in the wizard.

Add mentee preferences

As a mentee, add your preferences to find the right mentor to guide you through your career.

Before you begin

Enroll as a mentee. For more information, see Enroll as a mentor or mentee

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Role required: none

Procedure

1. On the mentee preferences wizard, answer the required questions.
2. Use the **Search skills** option to add skills that a mentor can help you with.
   To add skills, see Search and add skills.
3. Select **Next**.
4. On the **What are you looking for from your mentor?** question, set preferences that will help you match with the right mentor.

   Note: Select at least one preference.

   Mentor relationship preferences

Preference	Description
What industry expertise would you like your mentor to have?	Options available are: ○ Aerospace ○ Artificial Intelligence ○ Accounting ○ Financial Services ○ Consumer Goods ○ Health Care ○ Telecommunications ○ Government Administration
What topics of interest would you like to focus on with your mentor?	Options available are: ○ Developing Career Path ○ Leadership Development ○ Problem Solving ○ Harnessing Feedback ○ Decision Making ○ Networking
What communities would you like your mentor to be involved in?	Options available are: ○ Women in the workspace ○ BIPOC employee resource group ○ LGBTQ+ employee resource group ○ Veterans ○ Working Parents ○ Career Beginners

5. Select **Next**.

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6. On the **What are some of your other mentor preferences** question, add or remove options as per your choice.

Additional mentor relationship preferences

Other preferences	
Which department you want your mentor to be from?	Option to add the department you want your mentor from.
Which roles are you looking for your mentor to be in?	Option to search for mentors in particular roles.
Which timezones work best for you?	Option to add appropriate timezones.
Which locations work best for you?	Option to add an appropriate location to meet with your mentor.
What languages do you communicate in?	Option to select preferred languages.

7. Select **Enroll**.

Note: You can also save your preferences by select **Save as draft**, if you are not ready to enroll as a mentee yet.

Search and add skills

As a mentee, search for a skill name or a keyword to find a mentor who specialises in that skill to help you.

Before you begin

Enroll as a mentee. For more information, see Enroll as a mentor or mentee

Role required: none

Procedure

1. On the mentee preferences wizard, answer the required questions.
2. Use the **Search skills** option to add skills that a mentor can help you with.
3. On the **Search for more skills** wizard, specify the proficiency level from one of the following using the slide bar.
   - Unrated
   - Novice
   - Intermediate
   - Advanced
   - Expert
4. Select **Add Skills**.

Result

Selected skills are added to current skill preferences. You can go ahead and complete the mentee preferences wizard after adding skills.

Add mentor preferences

As a mentor, add your preferences to help mentees find out if you're the right match for them

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Before you begin

Enroll as a mentee. For more information, see Enroll as a mentor or mentee

Role required: none

Procedure

1. On the mentor preferences wizard, answer the required questions.
2. Select **Next**.
3. On the **What are you looking for from your mentor?** question, set preferences that will help you match with the right mentor.

   Note: Select at least one preference.

   #### Mentor relationship preferences

Preference	Description
What industry expertise would you like your mentor to have?	Options available are: ○ Aerospace ○ Artificial Intelligence ○ Accounting ○ Financial Services ○ Consumer Goods ○ Health Care ○ Telecommunications ○ Government Administration
What topics of interest would you like to focus on with your mentor?	Options available are: ○ Developing Career Path ○ Leadership Development ○ Problem Solving ○ Harnessing Feedback ○ Decision Making ○ Networking
What communities would you like your mentor to be involved in?	Options available are: ○ Women in the workspace ○ BIPOC employee resource group ○ LGBTQ+ employee resource group ○ Veterans ○ Working Parents ○ Career Beginners

4. Select **Next**.

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5. On the **What are some of your other mentor preferences** question, add or remove options as per your choice.

Additional mentor relationship preferences

Other preferences	
Which timezones work best for you?	Option to add appropriate timezones.
Which locations work best for you?	Option to add an appropriate location to meet with your mentee.
What languages do you communicate in?	Option to select preferred languages.
How many mentees are you willing to take on at a time.	Option to select between 1 or 2 mentees.

6. Select **Enroll**.

Note: You can also save your preferences by select **Save as draft**, if you are not ready to enroll as a mentee yet.

Search for a mentor

Search for mentors by name, job profile, or any other criterion you wish to. You can also use additional filters to search from the list of mentors.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. On a mentor's profile, in the Suggested mentors section, select **Search mentors**.

Note: You see suggested mentors only after setting your preferences.

3. On the **Explore available mentors** page, you will see a list of mentors who you can connect with.
4. Use the **Search by name or keyword** field to find a specific mentor you are looking for.
5. Select **Filters** and fill in the form to add skills or other requirements.

All filters form

Field	Description
Job family	Business unit or function of the mentor.
Job title	Role or job title of the mentor
Job seniority level	Role level of the mentor.
Tenure	Range of the tenure of the mentor.
Mentoring relationship	Range of the duration of the mentorship.

6. Select **Apply**.

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7. Find a mentor of your choice and select **Connect**.
   For more information, see Request a connection

Edit mentee preferences

As a mentee, edit your preferences based on your skills, focus areas, and topics of interest that you would like to discuss with your mentor.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. Select **Edit mentee preferences** for the listed mentoring program.
   Available mentoring programs are visible for users that meet the user criteria of the mentoring program. Not all mentoring programs are listed for all users.
3. On the Edit mentee preferences form, fill in the fields.

   For a description of the field values, see Edit mentee preferences form.
4. Select **Save and close**.

Edit mentor preferences

As a mentor, edit your preferences based on your skills, focus areas, and topics of interest that you would like to discuss with your mentor.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. Select **Edit mentor preferences** for the listed mentoring program.
   Available mentoring programs are visible for users that meet the user criteria of the mentoring program. Not all mentoring programs are listed for all users.
3. On the Mentor preferences form, fill in the fields.

   For a description of the field values, see Mentor preferences form.
4. Select **Save and close**.

Request a connection

Request a connection with a mentor who seems like the right fit for you.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. On a mentor's profile, in the Suggested mentors section, select **Connect**.

Note: You see suggested mentors only after setting your preferences.

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3. From the Mentoring duration list, select the duration.
4. In the **Message** field, add a request message.
5. Select **Send**.

View suggested mentors

Enrolled Mentees can instantly view Mentor suggestions based on their enrollment preferences and also view additional match insights and mentor expertise to be able to choose an appropriate mentor.

Before you begin

Enroll as a mentee. See Enroll as a mentor or mentee.

Add mentee preferences. See Add mentee preferences.

Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. In the **Suggested mentors** section, view a list of relevant matches based on your preferences.
3. You can either connect with a suggested mentor or use the search option to search for other mentors.

View match insights

View the Match Insights score that is calculated based on the match score of the preferences.

Before you begin

Enroll as a mentee. See Enroll as a mentor or mentee.

Add mentee preferences. See Add mentee preferences.

Role required: none

Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. In the **Suggested mentors**, click the hamburger menu on a suggested mentor.
3. Select **View match insights** and view the following match information about the suggested mentor or mentee.
   - Focus areas
   - Skills
   - Language
4. Select **Close** to close the match insights card view.

View mentoring requests

Track any mentoring requests you've sent or received from others.

Before you begin

Enroll as a mentee or a mentor. See Enroll as a mentor or mentee.

Role required: none

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Procedure

1. Navigate to **All** > **Employee Center** > **Your career** > **Mentoring** > **Overview**.
2. In the **Mentoring requests** section, you can choose to view information from the following information.

Option	Description
Requests from others	View a list of requests you have received from others. You can use the **Viewing**filter to select the type of request you want to view among the following: ○ Waiting for response ○ Accepted ○ Declined ○ Withdrawn ○ All
Your requests	View a list of requests you have sent to oth ers. You can use the **Viewing** filter to select the type of request you want to view among the following: ○ Waiting for response ○ Accepted ○ Declined ○ Withdrawn ○ All

Note: You can also sort the requests lists by **Most recent** and **Oldest**.

Mentoring reference

Mentoring Talent Development Reference

Mentoring relationship form

Use the mentoring relationship form to start a new relationship between a mentee and a mentor.

Mentoring relationship form

Field	Description
Mentee	Name of the mentee.
Mentor	Name of the mentor.
Duration	Default duration of the program in months.
State	State of the program.
Start date	Date on which the relationship begins.
End date	Date on which the relationship should end.
Request details	

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Mentoring relationship form (continued)

Field	Description
Request date	Date on which the relationship is requested.
Withdrawal date	Date on which the relationship must be withdrawn.
Request note	Details about the relationship request.
Decline details	
Decline reason	Reason for declining the relationship.
Decline date	Date of declination of the relationship.
Decline note	Details about why the relationship was declined.

Edit mentee preferences form

Use this form to record your preferences as a mentee.

Edit mentee preferences form

Field	Description
Find a different skill	Search field used to find a skill using a skill name or keyword. Search and add skills
Mentoring focus areas	
What industry expertise would you like your mentor to have?	Available options: • Aerospace • Artificial Intelligence • Accounting • Financial Services • Consumer Goods • Health Care • Telecommunications • Government Administration
What topics of interest would you like to focus on with your mentor?	Available options: • Developing Career Path • Leadership Development • Problem Solving • Harnessing Feedback • Decision Making • Networking
What communities would you like your mentor to be involved in?	Available options: • Women in the workspace • BIPOC employee resource group

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Edit mentee preferences form (continued)

Field	Description
	• LGBTQ+ employee resource group • Veterans • Working Parents • Career Beginners
Other preferences	
Which department do you want your mentor to be from?	Option to add the department you want your mentor from.
Which roles are you looking for your mentor to be in?	Option to search for mentors in particular roles.
Which time zones work best for you?	Option to add appropriate time zones.
Which locations work best for you?	Option to add an appropriate location to meet with your mentor.
What languages do you communicate in?	Option to select preferred languages.

Mentor preferences form

Use this form to record your preferences as a mentor.

Edit mentor preferences form

Field	Description
Mentor profile	Option to make your profile visible to others.
Skill strengths	List of all your skills and strengths as a mentor.
Mentoring focus areas	
What industry expertise can you share with your mentee?	Available options: • Aerospace • Artificial Intelligence • Accounting • Financial Services • Consumer Goods • Health Care • Telecommunications • Government Administration
What topics of interest would you be able to discuss with your mentee?	Available options: • Developing Career Path • Leadership Development

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Edit mentor preferences form (continued)

Field	Description
	• Problem Solving • Harnessing Feedback • Decision Making • Networking
What communities are you involved in that you'd like to help your mentee learn about?	Available options: • Women in the workspace • BIPOC employee resource group • LGBTQ+ employee resource group • Veterans • Working Parents • Career Beginners
Other preferences	
Which time zones work best for you?	Option to add appropriate time zones.
Which locations work best for you?	Option to add an appropriate location to meet with your mentor.
What languages do you communicate in?	Option to select preferred languages.
How many mentees are you willing to take on at a time?	Option to select either 1 or 2 mentees.

Employee Goals

The ServiceNow® Employee Goals application lets employees view and track their career goals from the Employee Center. This application is a tool that enables employees to stay focused and aligned with your company's strategic objectives, resulting in improved overall organizational performance.

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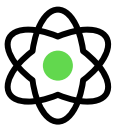
Get started

Explore  Learn how employees and managers use Employee Goals.	Install and configure  Install the Employee Goals app from the ServiceNow store. As an administrator, you can configure application features when configuration options are available.	Integrate  Extend the capabilities of the Employee Goals app by integrating with HCM software.
Using  View and revisit your goals to align individual efforts with company objectives.	Reference  Get details about components like fields, tables, and properties.	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Employee Goals

The Employee Goals application provides employees and managers with visibility into business goals set by your organization and personal goals that are specific to an employee. This application helps employees cultivate their goals into growth plans to bolster the talent in your organization.

The Employee Goals app is closely integrated with the following apps in the Talent Development suite:

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- Talent Development Core
  - Career profile
  - Growth plans
- Career Conversations

It also provides an integration with the following HCM systems that are widely used across organizations for goal management:

- Oracle Cloud HCM
- SAP SuccessFactors
- Workday

These integrations create a seamless process for employees and managers to view and track their goals from the Employee Center.

Employee Goals overview

The Employee Goals application integrates with the Talent Development suite of applications to enhance the professional growth of employees in your organization. This application enables employees to access and monitor their career goals via specific applications in the Talent Development suite.

When the Employee Goals app is installed, you can use certain applications in the Talent Development suite to view and track goals from the Employee Center. Employees continuously seek growth in their careers, and development often begins with a goal to support their professional endeavors. Goals provide employees with a sense of direction and focus, and keep employees motivated by fostering a culture of accountability. The Employee Goals app improves the employee and manager experience associated with using the Talent Development suite of apps by incorporating goals into the employee's career path. Its features provide the following advantages from which your employees and organization can benefit significantly:

- Establishes the prioritization of work.
- Assists employees to enhance their decision-making skills.
- Fosters an environment that promotes teamwork.
- Helps measure success.

Human capital management (HCM) integration

HCM software is an integrated suite of technologies that can help businesses manage their employees, from onboarding to retirement. A complete HCM system provides meaningful insights into the health of your workforce; it prioritizes employee experience and professional development to drive business outcomes. It also supports strategic processes and tasks, such as goal management, to help an organization function and evolve as its employees grow. To provide an integration with varying HCM systems, the Employee Goals app uses spokes to facilitate the connection. This integration enables you to view and track your goals using a single interface, thus creating a seamless process for goal management. This streamlined process simplifies the steps to view and track your goals, which helps to promote the adoption of the Employee Goals app across your organization.

The Employee Goals app provides an integration with the following HCM systems:

- Oracle Cloud HCM
- SAP SuccessFactors
- Workday

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Talent Development integration

The Employee Goals app imports the data from your HCM system to the Employee Goals [sn_egd_goals_employee_goal] table. Once the goal data is imported, you can view the corresponding goal from the Employee Center. You can access your goals using the following applications in the Talent suite:

Career profile

Employees can view their goals by accessing their career profile. The career profile contains the Goals widget that displays a card for each goal that was imported from your organization's HCM system. The Goals widget contains the following tabs that filter your goals into categories, which facilitates fast and convenient access to the goals that you want to view:

- **Active**
- **Completed**
- **Archived**

You can select the **View details** link associated with a goal that appears in the Goals widget to retrieve more information about a specific goal. When you select the **View details** link, the Goal details panel appears. This panel displays the following information for each goal:

- Status (On track, At risk, Complete)
- Title
- Type of goal (Business, Personal)
- Description
- Date created
- Due date
- Start date

Career Conversations

Employees can view their goals using the Career Conversations app. The Career Conversations app provides an accordion for goals in the contextual side panel that appears during a growth conversation. When you expand the Goals accordion, a card for each goal appears.

If an employee shares a goal with their manager, the manager can view the corresponding goal in the contextual side panel during a growth conversation. The goals that appear in the Career Conversations app help the employee and manager initiate a conversation based on a goal that the employee wants to share with their manager. This integration creates convenience for your employees and managers by enabling them to view and reference goals through a single interface during one-on-one conversations that revolve around the employee's growth and development.

Growth Plans

Employees can create a growth plan based on an active goal. The Growth plans app displays the three most recent goals when an employee initiates the growth plan creation process. Similar to the process of creating a growth plan that originates from an aspiration or conversation, employees can select a goal that they want to develop into a growth plan. The Employee Goals app enables employees to use a goal as context to start a growth plan.

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Installing and configuring Employee Goals

Install the Employee Goals application to import the goal management data stored on your human capital management (HCM) system to the ServiceNow AI Platform®. When configuration options are available, administrators can configure components of the application to meet the specifications of your organization.

After goal data is imported from your HCM system to the ServiceNow AI Platform, employees can conveniently access their goals from the Employee Center.

Install the Employee Goals application

Install the Employee Goals application to incorporate goals as a tool for developing your organizational talent. The Employee Goals app gives employees access to their goals from the Employee Center.

Before you begin

The Employee Goals app has dependency on the following applications:

- Career Conversations
- Talent Development Core
- Employee Center or Employee Center Pro

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Integrations for Employee Goals

Extend the Employee Goals application's capabilities by integrating with your organization's human capital management (HCM) system to make employee goals accessible while using the Talent Development suite of applications.

This integration enables the Employee Goals app to import goal management data from your HCM system to the Employee Goals [sn_egd_goals_employee_goal] table. Once the goal data

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is imported, employees in your organization can view and track their goals from the Employee Center.

The Employee Goals app provides an integration with the following HCM systems:

Oracle Cloud HCM

Integrate Oracle Cloud HCM with the Employee Goals app to access goals seamlessly from the Employee Center. For more information about the integration process with Oracle Cloud HCM, refer to Oracle HCM Cloud Spoke.

SAP SuccessFactors

Integrate SAP SuccessFactors with the Employee Goals app to access goals seamlessly from the Employee Center. For more information about the integration process with SAP SuccessFactors, refer to SuccessFactors Spoke.

Workday

Integrate Workday with the Employee Goals app to access goals seamlessly from the Employee Center. For more information about the integration process with Workday, refer to Workday HR Spoke.

Using Employee Goals

Use the Employee Goals app to access goal management data across several applications in the Talent Development suite.

View your employee goals

View your goals by accessing your career profile. Your goals that appear in the Goals widget are filtered into the following categories: active, complete, archive.

Before you begin

Role required: employee [sn_egd_act.employee]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the User options drop-down list, select **Profile**.

   Tip: The User options drop-down list is an icon that contains your user's profile picture.

   The employee profile appears.
3. Select the **Career** tab.
   The career profile appears.
4. Select **Goals** in the navigation menu to navigate directly to the Goals widget.
5. Select the **Active**, **Completed**, or **Archived** tabs in the Goals widget to view your goals by the category in which they're filtered.

Employee Goals reference

Reference topics provide additional information about the components and forms associated with the Employee Goals application.

Employee Goals table

The records in the Employee Goals table contain goal management data. Each record is created when the Employee Goals application imports the corresponding goal data from your organization's human capital management (HCM) system.

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The form that appears when you select a record in the Employee Goals table contains the following fields:

Employee Goal form

Field	Description
Name	A name for the goal that was set by the employee.
Owner	The employee to whom the goal belongs.
State	One of the following options to describe the status of the goal in terms of its progression: • **Draft** • **In Progress** • **Approved** • **Complete** • **Pending** • **Achieved** • **Not Achieved**
Active	A check box to indicate whether the goal is active.
Archived	A check box to indicate whether the goal is archived.
Start date	The date at which the goal starts.
End date	The date at which the goal ends.
Shared with manager	A check box to indicate whether the employee shared their goal with their manager.
Description	Free-form text to describe the goal in detail.
Type	One of the following options to indicate the goal type: • **None** • **Business goal** • **Personal goal**
Status	One of the following colors to represent the status of the goal: • **None** • **Green** • **Yellow** • **Red**
Domain	The domain associated with the employee specified in the **Owner** field.

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Talent Feedback

Talent Feedback is a new plugin available in Yokohama release. Skill Feedback is one of the features of Talent Feedback. Skill Feedback allows managers to request feedback on employee skills from the employee's collaborators,

Get started

Explore  Learn about Talent Feedback	Configure  Set up the Talent feedback plugin
Using  Learn how to use Talent Feedback	Reference  Other information about Talent Feedback

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Talent Feedback

Learn about Talent Feedback and its benefits as managers and employees looking to leverage a feedback engine.

Talent Feedback overview

Talent Feedback is a plugin that allows managers to view feedback and request feedback from employees. Skill feedback is one of the features supported in Talent Feedback.

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Talent Feedback users

Users

User	Description
Managers	• Managers can request skill feedback for their team members on required skills, from the employee's collaborators. • Managers can view skill feedback of an employee consolidated in one page. • Managers can view all the feedback received for a skill along with skill activities, during skill validation – This helps them get a full-fledged view of an employee's proficiency. • Managers can also view the status of requests sent and choose to withdraw them when needed.
Employees	Employees receive feedback requests sent to them in their Employee Center To-dos, where they can provide feedback and skill rating for one or more skills in the request.

Talent Feedback benefits

Talent Feedback benefits

Benefit	Feature	Users
Easier and efficient way to request skill feedback from employees.	Request skill feedback	Managers
Request feedback from various views of skills, helping you understand the skill level of the employee.	• Request feedback from skill distribution • Request skill feedback from skill expectations • Request skill feedback	Manager
View and submit skill feedback for other employees or decline any feedback request.	• View skill feedback submitted • Decline a feedback request	Employee

Talent Feedback requires the following related applications

Skills Foundation

The ServiceNow® Skills Foundation application is an AI-driven platform that you can use in your organization to develop a workforce that is based on skills.

Manager Hub

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The ServiceNow® Manager Hub increases a manager's self-service and proactive engagement with their team by providing insights and recommended actions for what's most urgent and important to drive team success. It enables managers to grow as leaders through curated and personalized resources.

What to explore next

To learn more about configuring and using Talent Feedback, see:

- Configuring Talent Feedback
- Using Talent Feedback
- Talent Feedback reference

Configuring Talent Feedback

Set up Talent Feedback to be able to use it along with Talent Development.

Install Talent Feedback

You can install the Talent Feedback application if you have the admin role. Talent Feedback is also installed along with Talent Development and Employee Center Pro.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Talent Feedback application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Talent Feedback:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Talent Feedback.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Talent Feedback application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Using Talent Feedback

Learn how to use Talent Feedback to request and provide feedback for any skills.

Overview of Talent Feedback

- Skill feedback is a feature in Talent Feedback that allows you as a manager to effectively assess your employees' skills and identify the right growth opportunities for them.
- Using Skill feedback, managers can Request skill feedback from the different views and widgets in Employee Center
- Using Skill feedback, employees can View skill feedback submitted as requested by their managers.

Working with Skill feedback in Talent Feedback

Skill feedback is one of the main features of Talent Feedback that can be used by managers to request feedback for their employees, and by employees to provide feedback for their peers.

- Request skill feedback

  As a manager, request skill feedback from an employee.

- View feedback requests

  As a manager, view and manage all the feedback requests raised for your employees.

- View skill feedback submitted

  As an employee, view and submit feedback requested from you.

Working with Skill feedback in Talent Feedback

Skill feedback is one of the main features of Talent Feedback that can be used by managers to request feedback for their employees, and by employees to provide feedback for their peers.

- Request skill feedback

  As a manager, request skill feedback from an employee.

- View feedback requests

  As a manager, view and manage all the feedback requests raised for your employees.

- View skill feedback submitted

  As an employee, view and submit feedback requested from you.

Request skill feedback

Using Talent Feedback you can request feedback for one or more skills from your employees.

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Role required: admin

There's more than one way you can request skill feedback on Talent Feedback. You can choose from one of the following ways to request feedback, based on the existing information.

- Request skill feedback - When there are no existing feedback requests, use the **Request feedback** option on the Skill feedback requests sent widget.
- Request feedback from skill distribution Use the **Request feedback** option from skill distribution view.
- Request skill feedback from skill expectationsUse the **Request feedback** option from skill expectations view using skill pills.

Request feedback from skill distribution

You can request feedback from skill distribution using skill view or employee view.

Before you begin

Role required: manager

Procedure

1. In Employee Center navigate to **Your team** > **Skills**.
2. On the skill distribution widget, select **View all**.
3. Here you can request feedback in two ways, either by selecting the employee or the skill pill.
   - From Employee view, click on the employee and select **View skill feedback** and then select **Request skill feedback**.
   - From Skill view, click the skill pill and select **Request skill feedback**.

     Note: You can use the toggle option to switch between **Employee view** and **Skill view**.
4. On the **Request skill feedback** form, fill in the information.

Request skill feedback form

Field	Description
Skills	Skills that you want to request feedback for. **Note:** If there are any unvalidated skills associated with the employee, those are populated in this field.
Request feedback from	Employee from whom you are requesting the feedback.
Feedback due by	Option to set the date by when the feedback is due.
Notes	This is an optional entry for you to add any other information that you'd like to add as a note to the feedback provider.

5. Select **Send request**.

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Request skill feedback from skill expectations

You can request skill feedback from the skill expectations widget on the Skills tab in Employee center.

Before you begin

Role required: admin

Procedure

1. In Employee Center navigate to **Your team** > **Skills**.
2. On the skill expectations widget, select **Score analysis** of the employee you want to request feedback from.
3. On the skill score analysis fly out, click  on any skill pill and select **Request skill feedback**.
4. On the **Request skill feedback** form, fill in the information.

Request skill feedback form

Field	Description
Skills	Skills that you want to request feedback for. **Note:** Since this feedback was requested from a skill pill, this field is pre-populated from the skill selected.
Request feedback from	Employee from whom you are requesting the feedback.
Feedback due by	Option to set the date by when the feedback is due.
Notes	This is an optional entry for you to add any other information that you'd like to add as a note to the feedback provider.

5. Select **Send request**.

Request skill feedback

You can request skill feedback from the skill feedback requests sent widget when there no existing feedback requests sent.

Before you begin

Role required: manager

Procedure

1. In Employee Center navigate to **Your team** > **Skills**.
2. On the skill feedback requests sent widget, select **Request feedback**.
3. On the **Request skill feedback** form, fill in the information.

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Request skill feedback form

Field	Description
Employe	Employee for whom you want to request the feedback.
Skills	Skills that you want to request feedback for. **Note:** Since this feedback was requested from the **Skill feedback requests sent** widget, this field needs to be manually populated.
Request feedback from	Employee from whom you are requesting the feedback.
Feedback due by	Option to set the date by when the feedback is due.
Notes	This is an optional entry for you to add any other information that you'd like to add as a note to the feedback provider.

4. Select **Send request**.

View and submit feedback

You can view any feedback request sent to you and submit the feedback on Talent Feedback.

Before you begin

Role required: manager/employee

Procedure

1. Navigate to **All** > **Employee Center** > **My tasks**.
2. Select the feedback request that you want to view or submit feedback.

   Note: Feedback requests are categorized based on the requester. If there are multiple feedback requests from the same employee, you will see them one after the other.

3. On the feedback request form, fill in the fields.

Feedback request form

Field/option	Description
Add rating	Option to add a rating for the skill
Which proficiency would you rate this skill at?	Toggle drag option to set the rating for the skill. **Note:** This option is enabled only when **Add rating** option is selected in the previous step.
Feedback	Text box to write your feedback.

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4. Select **Save** to review the feedback at a later time.
5. Select **Submit** to complete the feedback form.

> **Note:** Repeat these steps for other skills requested (if any) and then select **Submit**.

Decline a feedback request

You can decline a feedback request sent you if you do not wish to provide feedback for any reason.

Before you begin
Role required: employee

Procedure

1. Navigate to **All** > **Employee Center** > **My tasks**.
2. Select the feedback request that you want to view or submit feedback.

> **Note:** Feedback requests are categorized based on the requester. If there are multiple feedback requests from the same employee, you will see them one after the other.

3. Select **Decline**.
4. Add a reason for declination in the pop-up and select **Decline**.

View skill feedback submitted

As a manager, view all the skill feedback submitted by employees.

Before you begin
Role required: manager

Procedure

1. In Employee Center navigate to **Your team** > **Skills**.
2. On the skill feedback requests sent widget, select **View details** on any of the feedback listed.
3. On the skill feedback form, view the information.

Skill feedback

Field	Description
Feedback for	Employee who this feedback is for.
Requested to	Employee who the feedback is requested from.
Requested on	Date on which the feedback was requested.
Feedback due by	Date by which the feedback is due.
Status	Current status of the feedback request.
Feedback	Contents of the feedback and the rating for selected skill.

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Field	Description
	Note: If there are multiple feedback requests from the same employee, you will see them one after the other.

4. Select **Close** to close the feedback request form.

View feedback requests

You can view and feedback requests platform under the Talent Feedback module.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Talent Feedback** > **Feedback requests**.
2. Select the feedback request you want to view.
3. View the information on the **Talent Feedback Request** form.

Talent Feedback Request form

Field	Description
Number	Number allotted to the feedback request.
Requested for	Employee for whom the feedback is requested.
Opened by	Manager who opened the feedback request.
State	Current state of the feedback request.
Assigned to	Employee from whom the feedback is requested.
Due date	Date by when the feedback is due.
Short description	A description of the nature of skill or feedback requestd.

Note: You can also view the **Talent Feedback Request Skills** in the related links section of the form.

Begin a discussion from a Talent Feedback request

You can choose to begin a discussion regarding a talent feedback request using the Discuss option.

Before you begin
Role required: manager

Procedure

1. Navigate to **All** > **Talent Feedback** > **Feedback requests**.
2. Select the feedback request you want to start a discussion for.

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3. Select the **Discuss** option.
4. On the Start a Sidebar discussion form, fill in the information

Sidebar discussion form

Field	Description
Record number	Number allotted to the feedback request.
Subject	A description for the discussion. **Note:** This is auto-populated from the short description of the Feedback Request.
Add participants	Option to add participants to the discussion.
Include a brief message for participants	A message to the participants explaining the feedback/skill.

5. Select **Start discussion**.

Using Employee feedback collection AI agent

As a manager, use the Employee feedback collection AI agent to collect feedback and track feedback requests. This agent recommends collaborators from Employee Profile, Growth Experiences apps, journeys from Employee Journey Management, and also suggests frequent collaborators from Microsoft Graph.

Role required: sn_mh.manager_hub_user

Note:

- For the Employee feedback collection agent to work, you need to have the Now Assist for HR Service Delivery (HRSD) plugin which will install Now Assist for Talent and HR Talent AI Agent Collection.
- To enable Microsoft Graph suggestions you must configure the Microsoft Exchange Online and the Look up Relevant Users action.

AI agents for Conversations

Agentic AI feature	AI agents	Description
Collect employee feedback	Employee feedback collection AI agent	• The **Employee feedback collection AI agent** helps managers gather feedback efficiently from key colleagues. It identifies relevant collaborators based on Talent Development applications, journeys, and interaction patterns in Microsoft, automates feedback requests with reminders, and leverages

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AI agents for Conversations (continued)

Agentic AI feature	AI agents	Description
		existing Employee Center To-Dos to deliver feedback requests to providers and manage the process seamlessly. • The **Employee feedback collection AI agent** enables managers select scenario-specific feedback templates to improve the relevance and actionability of the feedback collected. These templates configured by an admin using the Platform Surveys tool. Managers can review a summarized view of a reportee's recent feedback and navigate to the Feedback page in Manager Hub to view all feedback received for any employee.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Collect feedback using an agent

Use the Employee feedback collection AI agent to collect feedback and track feedback requests.

Before you begin

Role required: manager

Procedure

1. Navigate to **All** > **Employee Center** > **Your team** > **Team members**.
2. Select the Now Assist icon to start a conversation with the agent.
3. Converse with Now Assist in Virtual Agent to create a feedback request.
4. Select the employee who you'd like to collect feedback for from the drop-down options suggested by the agent.
5. Choose the type of feedback you want to collect from the feedback templates suggested by the agent and click **Submit**.

   Note: The feedback templates are set by the admin. For more information, see Create feedback template using survey designer

6. Select the **See preview** option to see a preview of the questions that will be asked in the template you selected and click **Submit**.

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Note:

- You can choose to skip to see a preview of the questions by selecting the **Skip preview** option.
- You can also confirm your selection after reviewing the questions in the template by selecting the **Use this template** option or **Choose different template** option.

7. Choose potential collaborators based on your organization's approved sources as suggested by the agent.
8. Provide a time frame for the feedback to be submitted by when prompted by the agent.
9. View a preview of the feedback request and end the chat with Now Assist in Virtual Agent.

View consolidated feedback in Manager Hub

View a consolidated summary of all the feedback received for an employee.

Before you begin

Role required: manager

Procedure

1. Navigate to **All** > **Employee Center** > **Your team** > **Team members**.
2. Select the Now Assist icon to start a conversation with the agent.
3. Converse with Now Assist in Virtual Agent to view or receive an update on a feedback request.
4. Select the employee who you'd like to view feedback for from the drop-down options suggested by the agent.

   Note: You can also request for a summary of all employees.

5. View the summary or update on the feedback request you sent in the last 3 days.
6. Select **View all received feedback** to navigate to the feedback summary details page.

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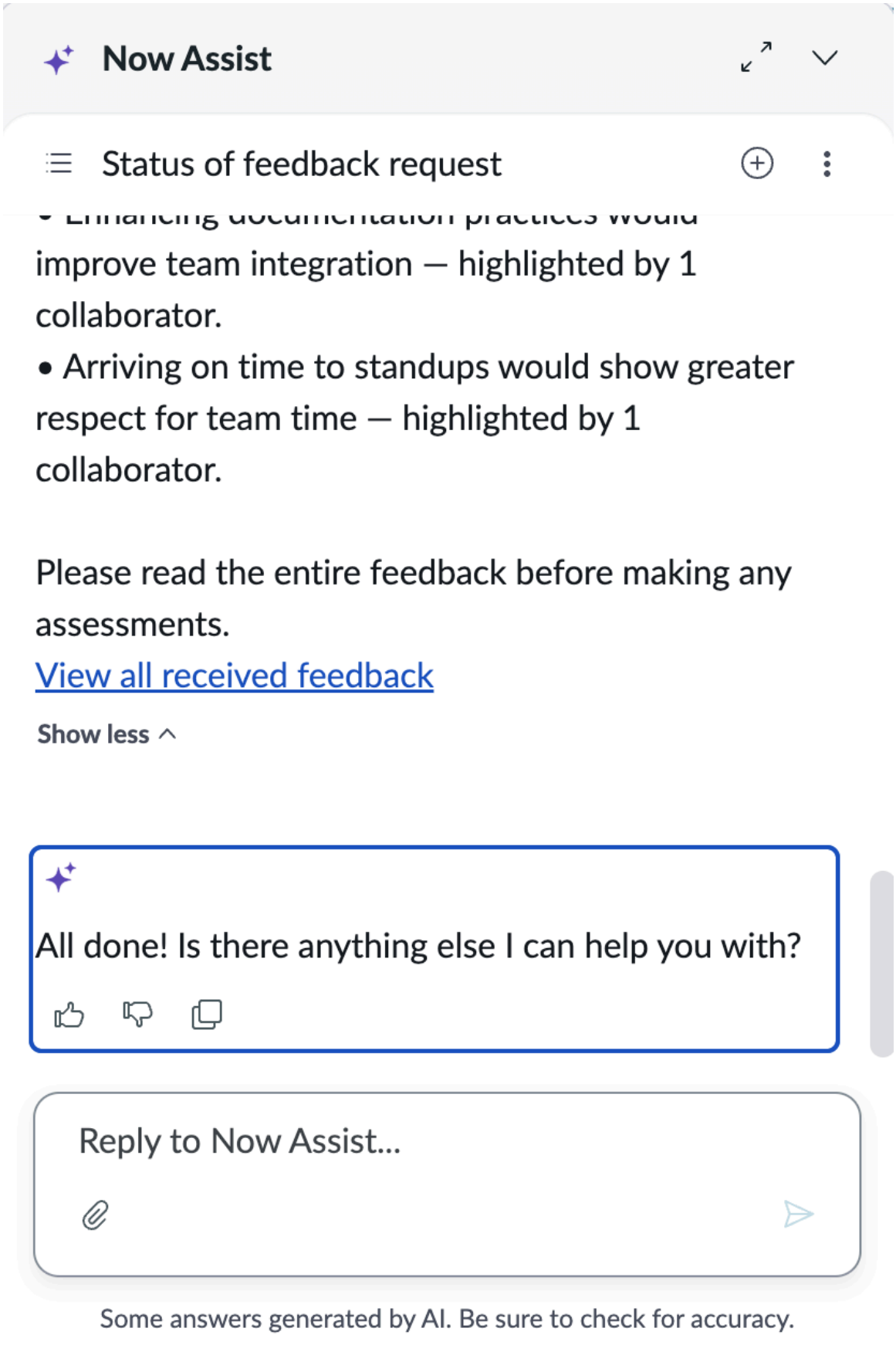

Navigate through the Feedback page for insights gathered for the selected employee from the following options:

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- **Feedback type**: Filter o select the feedback type.
- **Received from**: Filter to select the feedback provider.
- **Sort by**: Filter to sort the feedback collected by date.

Create feedback template using survey designer

As an admin, you can create feedback templates using survey designer that managers can use to collect specific feedback.

Before you begin

Role required: admin

- Ensure Scope/Application of the Survey Template is **Talent feedback (sn_tf)**
- Ensure the Active field on the Survey Template (**asmt_metric_type) is true**
- Ensure Publish State on the Survey Template is **Published**
- Ensure ALL metrics (questions in the survey) have datatype: **scale, numericscale, or string ONLY**

Procedure

1. Navigate to **All** > **Survey** > **View Surveys**.
2. Open a survey definition in Survey Designer.
3. Select the **Configuration** tab.
4. On the Survey Designer Configuration form, fill in the fields.
   For a description of the field values, see Survey Designer Configuration form.

   Note:
   - The default value of a survey's duration field is 14 days. For a feedback template, it should be modified to 0 days.
   - A survey instance is created for every feedback request sent using a feedback template, and every instance has a Due Date field. This due date field is overwritten by the due date given by the manager in the agent flow during feedback request creation.
   - The description of the survey is shown to the managers in the agent flow during the template selection step.
5. Select the **Availability** tab and complete the form.

View survey instance

A survey instance represents one questionnaire assigned to one user. You view an instance to verify that survey instances were created, to check the state of a survey instance, or to reassign a survey instance.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Survey** > **Survey Instances**.

   The following sub-modules are available based on the state of the instances:

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- **Ready to take**: Displays survey instances that are ready to be taken by the user. By default, these instances are sorted in ascending order by the **Number** field.
- **In progress**: Displays survey instances that are in progress. By default, these instances are sorted in ascending order by the **Number** field.
- **Completed**: Displays survey instances that are complete. By default, these instances are sorted in descending order by the **Taken on** field.
- **Cancelled**: Displays survey instances that are cancelled. By default, these instances are sorted in ascending order by the **Number** field.
- **All**: Displays survey instances in all states. By default, these instances are sorted in ascending order by the **Number** field.

2. Open a survey instance from the required sub-module.

   By default, you can view the following fields in the Survey Instance form for all sub-modules other than **Completed**.

   - **Number**
   - **Metric type**
   - **Due date**
   - **Taken on**
   - **Assigned to**

   Note:

   - When you open an instance in the **Completed** sub-module, you are redirected to the User's Response page.
   - Each survey instance is stored as a record on the Assessment Instance [asmt_assessment_instance] table with a modified view for survey use.

Talent Feedback reference

Reference topics provide more information regarding the dependencies, components, and tables installed along with Talent Feedback.

Components installed with Talent Feedback

Several types of components are installed with activation of the Talent Feedback plugin, including tables, user roles, and scheduled jobs.

Roles installed

Role title [name]	Description	Contains roles
Talent feedback admin [sn_tf.admin]	Manages all the Talent Feedback in the module.	None

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Tables installed

Table	Description
Talent Feedback Request [sn_tf_feedback_request]	Stores all the details of the feedback request.
Talent Feedback Request Skill [sn_tf_feedback_request_skill]	Stores all the skill related information for the feedback request.

Employee Journey Management

Employee Journey Management integrates HR Service Delivery features and applications to enable employees, managers, and the organization to initiate and manage journeys to drive employee engagement and productivity. There are several applications, plugins, integrations, and features that are available for Employee Journey Management.

Get started

Journey Designer	Journey Accelerator	Lifecycle Events
		
Personalize employee journeys to enhance their experience.	Use Journey Accelerator to create personalized journey plans for key employee transitions.	Use Lifecycle Events to automate complex processes across the enterprise and create great employee experiences during moments that matter.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Journey designer

The ServiceNow® Journey designer application enables employees and managers in your organization to initiate and manage journeys to drive employee engagement and productivity.

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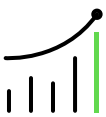
Journey designer Getting started

Journey designer uses Journey Accelerator and Lifecycle Events to create a unified journey experience for employees and managers in the Employee Center. Journeys offer a unique user experience. In the back-end, records are created using Journey designer, Journey Accelerator, and Lifecycle Events components to pull together a customized journey for employees.

Explore  Learn how Journey designer helps facilitate journey creation, management, and completion.	Install  Install the Journey designer app and its features.	Configure  Configure Journey designer
Use  Managers, mentors, and employees work with journeys from the Employee Center.	Integrate  Extend Journey designer capabilities by integrating with other applications.	Journey plan configuration review and approval process  Create, manage, and use Journey designer plan configuration templates
Journeys on Now Mobile 	Analytics and Reporting Solutions  Monitor journey data in reports and dashboards.	Reference  Get details about components like roles, fields, tables, and properties.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

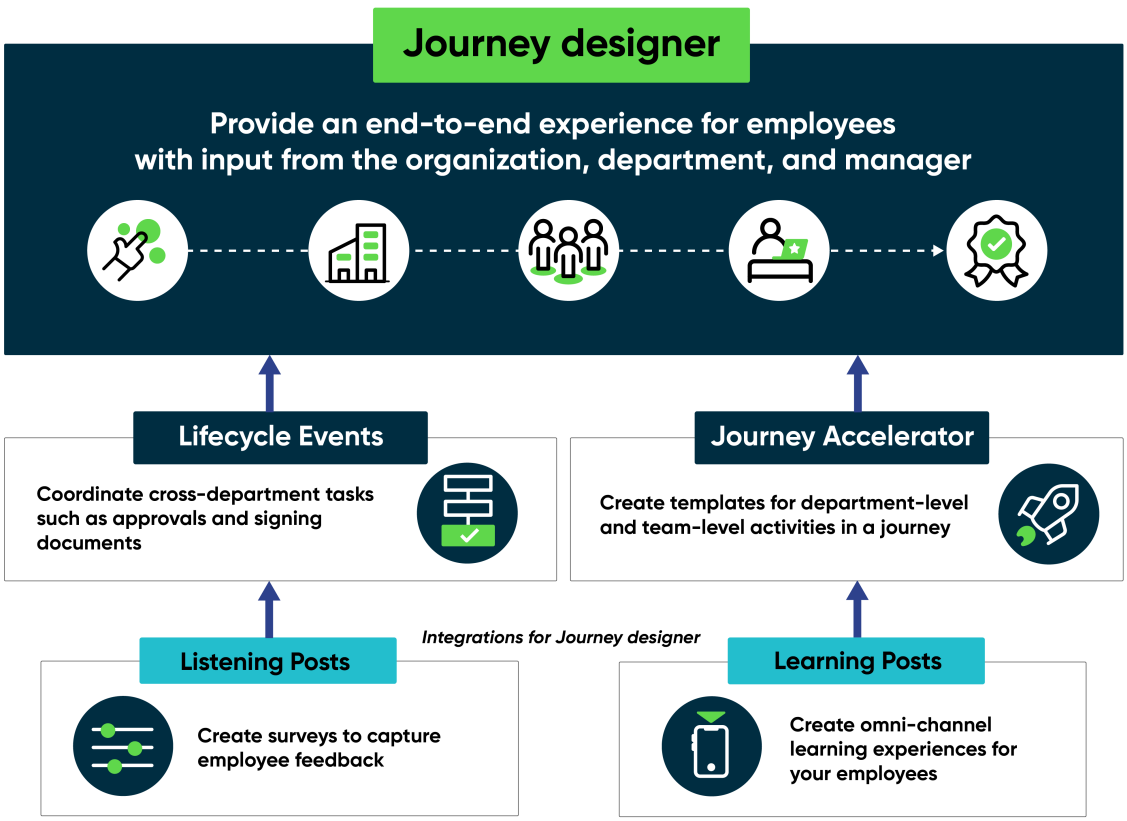
Explore Journey designer features

Organization administrators activate and configure Journey designer to help managers and employees understand and actively collaborate on professional and personal journeys.

Journey designer data model and related applications

Journey designer expands the possibilities for managers and administrators to create consistent and meaningful employee journeys. Journeys are created by using Lifecycle Events and Journey Accelerator features and functionality to support employees and mentors navigate various journeys.

Journey designer related apps and integrations



Lifecycle Events

Lifecycle Events enable the fulfillment of HR cases that are related to various employee journeys and transitions.

Journey Accelerator

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Administrators can use the ServiceNow® Journey Accelerator application to create templates for plans and to-do tasks. Managers then use the templates to create and publish customized plans for key employee transitions. Managers, employees, and mentors can access the plans from the Employee Center (EC).

Integrations for Journey designer app

Extend the Journey designer application's capabilities by integrating other applications into the journey experience.

Administrators can

- Install, configure, and maintain journeys.
- Configure analytical reports and display the results in dashboards.
- Use Lifecycle Events and Journey Accelerator to build journeys.

Managers can

- Build employee journeys that are easy to maintain and reuse.
- Add mentors to journeys for improved collaboration.
- Use in-product guidance on how, when, and why to create and manage journeys for team members.
- Review reports and dashboards to help understand and track results.
- View important information about outstanding journeys and drill down on details.
- Trigger new journeys for team members.

Employees can

- View and complete urgent to-dos from Lifecycle Events and Journey Accelerator.
- Navigate through all of their tasks and milestones.
- Schedule events and complete learning.
- Complete learning courses added by your organization or your manager.

Related topics

Lifecycle Events

Journey Accelerator

Journey details guided tours

Use Guided Tours in Journey designer to get instructions on how to perform a task. Guided Tours use a series of steps that may span multiple pages. The tour includes links to detailed documentation.

Before you begin

Role required: manager

Procedure

1. Navigate to **All** > **Employee Center** > **Journeys**.
2. Select a journey and click on **Tours**.
3. Select **Begin Tour**.

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4. Take the necessary action and select **Next** to progress through the tour.
   For ending the tour at any point, you can select **End Tour** in the side panel or select the Close icon in the pop-up window and confirm to end the tour.
5. Select **Done** after the tour is ended.

Journey overview guided tour

Use Guided Tours in Journey designer to get instructions on how to perform a task. Guided Tours use a series of steps that may span multiple pages. The tour includes links to detailed documentation.

Before you begin

s
Role required: manager

Procedure

1. Navigate to **All** > **Employee Center** > **Journey overview**.
2. Select a journey and click on **Tours**.
3. Select **Begin Tour**.
4. Take the necessary action and select **Next** to progress through the tour.
   For ending the tour at any point, you can select **End Tour** in the side panel or select the Close icon in the pop-up window and confirm to end the tour.
5. Select **Done** after the tour is ended.

Pre-hire experience

The Pre-hire experience is a portal that caters to employees who are in transition between the applicant phase and the onboarding phase. This onboarding portal is a solution that facilitates the preboarding process by enabling employees who have been selected by your organization to embark on their first journey.

The Pre-hire experience streamlines the preboarding process for newly hired employees. This portal provides your organization with the necessary elements that help newly hired employees integrate quickly into your company's culture. This portal supplies a centralized location for new hires to perform the following tasks so they can be ready for work from their first day on the job:

- Complete necessary paperwork
- Review benefits
- Review HR policies and company resources
- View training and orientation schedules

The Pre-hire experience assists new hires with connecting seamlessly to team members, mentors, and managers to whom they report so they can foster meaningful workplace relationships. This onboarding portal serves as a gateway into your organization to support new hires with assimilating faster into their roles while grasping the dynamics of their responsibilities.

Pre-hire experience system requirements

To enable and use the Pre-hire experience, you must satisfy the following minimum system requirements:

Application requirements

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- Upgrade the Journey designer application to version 7.0.
- Install and activate the Explicit Roles [com.glide.explicit_roles] plugin.
- Install and activate Journey Accelerator [sn_ja] Version 6.7.1 or higher.

Software release requirements

Upgrade your instance to the Zurich release Patch 1.

Pre-hire experience security components

To protect the data in your instance, the following components were created for the Pre-hire experience:

Roles

The sn_jny.pre_hire role is created for the individual who is transitioning from applicant to employee and using the Pre-hire experience to initiate your organization's preboarding process. This role inherits the snc_external role to restrict access to the sensitive data that resides in your instance.

Access control lists

New access controls lists (ACLs) were created to provide an added layer of security for the sn_jny.pre_hire role. These new ACLs help to avoid the modification of existing ACLs that may be in use by your organization. New ACLs ensure that access to sensitive data is restricted by deterring you from using existing ACLs that provide access to data associated with specific roles. You can navigate to the Access Roles [sys_security_acl_role] table to view the list of ACLs that support the sn_jny.pre_hire role.

Lifecycle Events activities for the Pre-hire experience

The following Lifecycle Events activities were created to facilitate the transition of roles through which the employee navigates during the preboarding process:

Lifecycle Events activities used in the Pre-hire experience

Activity name	Description
Account/role setup and notification	The Account/role setup and notification activity is used to facilitate the employee's transition from the applicant role to the pre-hire role. This activity is a replacement for the Account setup and notification activity. This activity is nested in the Pre-hire activity set, which is associated with the following Lifecycle Events type: Onboarding (Demo). This activity contains the Account setup and notification subflow, which performs the following actions when the Pre-hire activity set is triggered: • Creates an account for the employee to enable access to the onboarding portal. • Adds the sn_jny.pre_hire and snc_external roles to the employee's user record. • Sends an email to the employee with a link to the onboarding portal.

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Lifecycle Events activities used in the Pre-hire experience (continued)

Activity name	Description
	The Pre-hire activity set is triggered immediately after you create an onboarding journey for the onboarding employee.
Transition pre-hire to employee	The Transition pre-hire to employee activity is used to facilitate the employee's transition from the pre-hire role to the internal employee role. This activity is nested in the Day 1 activity set, which is associated with the following Lifecycle Events type: Onboarding (Demo). This activity contains the Transition to employee subflow, which performs the following actions when the Day 1 activity set is triggered: • Removes the sn_jny.pre_hire and snc_external roles from the employee's user record. • Adds the snc_internal role to the employee's user record. The Day 1 activity set is triggered when the date in the **Employment start date** field in the HR profile record of the onboarding employee is equal to the system date.

Pre-hire experience widgets

The Pre-hire experience is composed of the following widgets to help your onboarding employee become acclimated to their new role and environment:

Widgets available for the Pre-hire experience

Widget	Description
Getting started resources	This widget contains quick links for accessing internal and external resources. Administrators can provide links to knowledge base articles, catalog items, pages, or other pertinent information contained in your organization's repository. Administrators can configure the links that appear in this widget.
Onboarding journey	This widget contains a link that onboarding employees can select to view and complete the tasks associated with their preboarding journey.
Our culture	This widget contains rich content, such as videos, images, or other forms of engaging media to enhance the employee's onboarding experience. Administrators can configure the content that appears in this widget by

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Widgets available for the Pre-hire experience (continued)

Widget	Description
	accessing the Our culture content record. The Our culture content record resides in the Content [sn_cd_content_base] table.
Start onboarding	This widget is a banner that's used to welcome the onboarding employee to your organization. Administrators can configure the content and design associated with the banner to meet the needs of your organization. You must access the Start Onboarding record to configure the components associated with this banner. The Start Onboarding record resides in the Content [sn_cd_content_base] table.
Your onboarding team	This widget reflects the employee's onboarding team. A list of the following individuals and teams appear in this widget: • The onboarding specialist. The onboarding specialist is the individual to whom the corresponding Lifecycle Events case is assigned. • The manager to whom the employee reports. • The mentor assigned to aid the employee's growth and development. • The IT help desk.

Related topics

Enable and configure the Pre-hire Experience

Installation and configuration overview

The Journey designer app has multiple versions that have different installation instructions and configuration options.

Install Journey designer

Install the Journey designer version 3 [sn_jny] application to enable administrators and managers to create and manage various professional and personal events and journeys.

Before you begin

Note: You must upgrade to Vancouver before you can install Journey designer.

Dependent plugins and apps for Journey designer:

- Human Resources Scoped App: Core [com.sn_hr_core]
- Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent]
- Employee Center Pro 28.2.1 [sn_ex_sp_pro]
- Journey Accelerator 6.2.2 [sn_ja]
- Admin Experience Framework 2.1.3

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Role required: admin.

About this task
Journey designer must be installed as a store application.

> **Important:** The Journey designer app also installs the Journey Accelerator [sn_ja] (JA) application.

Procedure
1. Go to the ServiceNow Store and find the Journey designer [sn_jny] application using the filter criteria and search bar.

   In the list next to the **Install** button, the versions that are available to you are displayed.
2. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. If demo data is available and you want to install it, select the **Load demo data** check box.

   Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   > **Note:** Any demo data related to dependent applications must be updated when Journey designer is updated.
5. Select **Install**.

Add or repair demo data for applications and plugins

If the demo data wasn't added during the initial installation, administrators can add demo data to a plugin using **Repair** install.

Before you begin
Role required: admin or sn_appclient.app_client_company_installer

About this task
Any demo data from installed dependent applications must be updated when Journey designer is updated. You can view which store applications are installed from the **Journey designer Admin Console**, see. Configure Journey designer features.

Run a repair installation on a plugin to add demo data or fix an issue that the plugin is experiencing.

Procedure
1. Navigate to **All** > **System Definition** > **Plugins**.
2. Find the plugin or application that you want to add demo data to and select the more icon (vertical eclipses).
3. Select **Repair**.
4. Select the check box for **Load demo data**.
5. Select **Repair**.

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6. Select **View Log** to view and confirm that the demo data was added.

   Note: Sort the **Created** column in descending order to see the latest log entries first.

   Example Log:

```
Loading onload_demo_data plugin script:
 com.sn_hr_lifecycle_ent/sys.scripts/generate_onboarding_cases
.js
```

Fix Restricted Caller Access (RCA) approval requests

After you install or upgrade to the latest Journey designer application from ServiceNow Store, you might encounter RCA approval messages requesting for an update in the access request.

Before you begin

Role required: admin

About this task

RCA requests that are generated after the installation of a newer version of the Journey designer application that are in the **Requested** state can be manually updated to **Allowed**. You can manually update the requests, or you can follow the directions in KB1432208 to upload and run a script to update RCA requests in bulk.

Procedure

1. Navigate to **All** > **System Application** > **Application Restricted Caller Access**.
2. In the **Status** column, right-click **Allowed** and select **Filter Out**.
   A list of **Requested** RCA privileges is displayed.
3. In the **Operation** column, double-click the entry you want to update.

   Note: If needed, change to the application that the request is for.

4. Select **Allowed** in the **Status** list.
5. Select **Update**.
   If there are multiple RCA requests, you must follow this task for each request.

Configure Journey designer features

Administrators configure Journey designer for the needs of their organization.

Journey designer administration console apps and configuration

The Journey designer administration console consolidates Journey Accelerator, Journey designer, and Lifecycle Events configuration needs in a single intuitive page. Administrators can see which applications are already installed and other applications that are available for installation.

Design a journey

Create and configure Lifecycle Events and Journey Accelerator plans to build and maintain journeys.

Enhance the journey

Manage the features you already have installed and see what's available to install and enhance your journeys.

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Journey designer console helpful resources

Administrators new to Journey designer can use the resources available on the admin console page to learn about the features and workflow for creating journeys.

Introduction

View a video that shows you the basic flow for creating and maintaining journeys. This video offers and detailed explanation about the relationship between Journey designer, Journey Accelerator, and Lifecycle Events.

Getting started

Learn more about journeys, Lifecycle Events, and Journey Accelerator. This information helps you to understand everything involved in creating journeys.

Helpful resources

Access the Journey designer guided setup or detailed documentation from the helpful resources listed in the console.

Basic configuration process overview

The configuration process depends on the features and integrations used in your organization. Here are the basic process steps for configuring Journey designer.

Step 1: Create and manage journey configurations

- Create and configure Journey designer journeys

  Journey designer configurations are used as templates for creating journeys. Administrators create configurations that are used to trigger journeys.

- Manage Journey designer user roles

  Your roles control access for creating and modifying different features in Journey designer.

Step 2: Configure the Journey

Create a Journey type to classify the Journey configuration and associate the journey with a Lifecycle Events, Journey Accelerator, or both. Create and manage Journey types

- Lifecycle Events, see Configure a lifecycle event

  Note: A journey that contains a life-cycle event must have an associated HR Service with the **Journey** fulfillment type. Either update an existing HR Service case or create a one. See Configure an HR service for a journey

- Journey Accelerator, see Create a Journey Accelerator plan type

Step 3: Configure Journey permissions

Update users' permissions for journeys

Step 4: Create and manage Journey designer reports and dashboards

Journey designer dashboards and reports

Create and configure Journey designer journeys

Create a journey and embed the necessary components from Lifecycle Events and Journey Accelerator.

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Before you begin
Role required: sn_jny.admin

About this task
A journey is a top-level container, where you define whether the Journey contains Lifecycle Events or Journey Accelerator modules, as well as the permissions for journey owners and mentors.

Procedure
1. Navigate to **All** > **Journey designer** > **Manage Journey Configurations**.
2. Select **New**.
3. On the form, fill in the fields.
   See Journey designer Journey Configuration fields reference.
4. Click **Submit**.

Manage Journey designer user roles

Manage Journey designer users and the roles that they have.

Before you begin
Role required: sn_jny.admin

About this task
The Journey designer application includes roles with the permissions necessary for that user to complete tasks. For more information on the roles installed with Journey designer, refer to Roles.

As an administrator, you can assign users to roles to enable them to perform tasks in Journey designer.

Procedure
1. Navigate to **All** > **Journey designer** > **Manage Roles**.
2. Select the role that you want to add a user to.
3. In the **User Roles** form, select **New**.
4. From the **User** list, select a user.
5. Select **Submit**.

Manage Journey designer bulk updates for tasks

Journey designer admins can configure which task types are available for bulk update and view information about tasks that were updated in bulk.

Managing bulk task updates is set to active for Journey designer version 4.0 and later. The task types available for bulk update are:

- Approval [sysapproval.approver]
- Mark when complete [mark_when_complete]
- Submit catalog item [submit_catalog_item]
- Submit order guide [submit_order_guide]

Remove a task type from bulk update

As an admin you can remove a task type from the types available for bulk update.

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Before you begin
Role required: sn_jny.admin

Procedure

1. Type `sys_properties.list` in the **All** search filter.
2. Press enter.
3. Search for `Journey designer` in the **Application** column.
   If the **Application** column isn't visible, select the gear icon to add the **Application** column to the **Personalize List Columns**.
4. Select **sn_jny.bulk_management_task_type** from the name column.

   Note: You must be in the Journey designer scope to be able to edit this property.

5. In the **Value** field, delete any task type entry that you want removed from the bulk update feature.

```
{
"sn_hr_core_task": ["submit_catalog_item",
 "submit_order_guide", "mark_when_complete"],
"sysapproval_approver": true
}
```

   - Approval [sysapproval.approver]
   - Mark when complete [mark_when_complete]
   - Submit catalog item [submit_catalog_item]
   - Submit order guide [submit_order_guide]

6. Select **Update**.

View Journey designer bulk request task records

View bulk update records to determine if updates were successful or failed.

Before you begin
Role required: sn_jny.admin

Procedure

1. Type `sn_jny_bulk_request.list` in the **All** search filter.
2. View information about bulk updates, including status.

   - **Created**: The date that the record was created.
   - **Requested by**: The name of the user that requested the bulk update.
   - **Status**:
     - Error
     - Requested
     - Success
   - **Bulk request initiated from**: The task that the bulk update was requested for.
   - **Action taken**:

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- Completed
- Skipped: Only optional tasks can be skipped.
- Approved
- Rejected

- **Message**: The message that is returned to the UI.
- **Bulk task IDs**: A number used by the system to track the bulk request.

Links that are selectable lead to additional information for the listed column.

Creating and managing quick links for journeys

Quick links give employees quick access to varied resources directly from a journey. Administrators, journey owners, and mentors are able to add linked resources to journeys.

Note: Journey owners and mentors must be given **Can add quick links** permission by an administrator. Journey permissions are assigned and managed in journey configurations. See, Update users' permissions for journeys.

There are two types of quick links that can be added to a journey from **Journey designer**.

- Administrator configured links: Administrators add quick links to journey types. These quick links are added to all journeys that are created from that journey type.
- User configured links: Journey owners and mentors with **Can add quick links** permission add or delete web-based links directly to a user's journey.

Note: Administrator added quick links can't be deleted by journey owners or mentors.

Quick links added by administrators

From the **Manage Journey Type Quick Links** page, administrators create and configure quick links in a journey configuration.

Manage journey type quick links form

Field	Description
Content type	The content type represents the type of knowledge the quick link goes to: • **Knowledge**: Articles within a knowledge base that can be shared across an organization. • **Catalog item**: Hardware and software items that can be tracked and offered in the service catalog. • **Page** • **External link**: Links to websites with a valid URL format, for example `https://www.domain.com`. **Note:** Selecting a content type opens additional fields used with that content type.

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Manage journey type quick links form (continued)

Field	Description
Quick link name	The name of the link that is visible in the journey.
Title	The title entered in this field overrides the default title of the quick link.
Short description	The description added in this field overrides the default description of the quick link.
Icon	The icon displayed for a quick link in a journey.

Quick links added by managers and mentors

Managers and mentors with edit journey permission add external links to a journey.

Manage journey type quick links form

Field	Description
Link text	The user readable text that is visible in the journey.
Link address	Manager and mentors add valid external links. The Quick Links widget checks for a valid URL format. For example, `https://www.website.com`.

Create a quick link as an administrator

Journey designer administrators create quick links that are part of a journey configuration. Administrator created quick links cannot be deleted or edited by journey owners or mentors.

Before you begin

Role required: sn_jny.admin

About this task

Quick links added by an administrator appear in all **Journey Types** they are added to. Only administrators can delete a quick link from **Journey Types**. See, Delete a quick link created by an administrator.

Procedure

1. Navigate to **All** > **Journey Designer** > **Manage Journey Type Links**.
2. Select **New**.
3. Select a **Type** and **Quick link**.
   - **Type**: Only active **Journey Types** are available.
   - **Quick link**: The **Quick link name** for active Employee Center Quick Links. See, Quick links configuration

> **Note:** If you don't see the Journey Type you are looking for, start typing the name of the journey type in the field to search for it.

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Delete a quick link created by an administrator

To delete an administrator created quick link in Journey designer, you must be an administrator.

Before you begin

Role required: sn_jny.admin

Procedure

1. Navigate to **All** > **Journey Designer** > **Manage Journey Type Links**.
2. Select the check box for the row that contains the link you want to delete.
3. From the **Actions on selected row** list, select delete.
4. Confirm that you want to delete the record.
   Deleting the record removes the quick link from all journeys of that **Journey Type**.

Update users' permissions for journeys

Users in a journey have permissions that enable different levels of access to a journey. Administrators modify user permissions for different types of journeys.

Before you begin

Role required: sn_jny.admin or admin

Procedure

1. Navigate to **All** > **Journey designer** > **Mange Journey Configurations**.
2. Select the configuration to modify.
3. Select the tab for the user permissions to modify.
   - **Journey owner permissions**
   - **Mentor permissions**

   For user permission details see, Journey designer user permissions reference.
4. Select a check box to enable the permission, or clear a check box to disable the permission.
5. Select **Update** to save your changes.

Create and configure Journey designer headers

Manage journey headers or customize journey headers for different journey types based on user roles.

Before you begin

- The **Application scope** must be set to Journey designer.
- Role required: sn_jny.admin

About this task

There are default heading configurations for these personas:

Employee

The person for who the journey is created.

Journey owner

The creator of the journey. Owners are often managers for the employees on a journey.

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Mentor

A person who helps employees to complete journeys.

Note: A **Heading Configuration** must first be created to add heading configuration fields to.

Procedure

1. Navigate to **All** > **Journey designer** > **Manage Heading Configurations**.
2. Select **New**, or open an existing Heading Configuration.

   Create header configurations for each persona included in a journey.

   - Employee: The user the journey is created for.
   - Mentor: A user that helps the employee to complete a journey.
   - Owner: The user who created a journey. Journey owners are employee managers or mentors.
3. Open a header configuration to modify or add fields to the configuration.

   Note: A header configuration must exist before **Heading Fields** can be added or changed.

   a. Select **New**, or open an existing heading field.
   For more information see, Journey designer header configuration fields reference.

   b. Fill out the **Heading Field** form, and select **Submit** or **Update**.

Related topics

Journey designer header configuration fields reference

Create and manage Journey types

Create plan types to manage the top-level classification for stages and tasks for Journey types, as well as the header views for users.

Before you begin

Role required: sn_jny.admin or admin

Procedure

1. Navigate to **All** > **Journey Designer** > **Manage Journey Types**.
2. Select **New**.
3. In the **Title** field, enter a meaningful name for the type of journey that you are creating so that it is easily identifiable.
4. Click the search icon next to a role to change the header configuration for that role.

   These fields contain default plan header configurations for the plan type.

   - View for manager
   - View for employee
   - View for mentor

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See Create and configure Journey designer headers to customize headers for a plan.

5. After you have selected any header configuration you want to change, select **Submit**.

Create and manage plan types

Create plan types to manage the top-level classification for stages and tasks in a Journey designer plan.

Before you begin

Role required: admin [sn_jny.admin]

Procedure

1. Navigate to **All** > **Journey Designer** > **Manage Plan Types**.
2. Select **New**.
3. In the **Title** field, enter a meaningful name for the type of plan that you are creating so that it is easily identifiable.
4. After you have selected any header configuration you want to change, select **Submit**.

Create and manage plan configurations in Journey designer

Create and manage plan configurations that are based on a plan type. Plan configurations are customized for specific employee audiences.

Before you begin

- A plan type must exist: Create and manage plan types
- Journey designer v1
- Role required: admin [sn_jny.admin]

Procedure

1. Navigate to **All** > **Journey Designer** > **Manage Plan Configurations**.
2. Select **New**, or open an existing plan configuration.
3. On the form, fill in the fields.

Plan Configuration form

Field	Description
Title	Descriptive title so that managers can identify different plan configurations. For example, Sales Employee Plan Configuration.
Audience	A group of users. Select an audience so that you can control which specific groups of users can access the plans.

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Field	Description
	Note: The plan configuration preview feature depends on whether the plan configuration owner has access to the selected **Audience type**. These **Audience types** are accessible to all plan configuration owners. ○ HR Profile ○ HR Criteria ○ Users ○ Users Criteria ○ Upload file
Active	Option that you can select to make the configuration available for use. **Note:** A plan cannot be active until it contains at least one stage.
Journey Accelerator plan type	Plan types. The top-level classification is used to identify different types.
Short description	Brief description of the plan.
Description	Detailed description of the plan.

4. Select **Submit**.

To add stages to the plan, do the following:

5. Select the plan you just created.
6. Select **New**.
   a. Choose an available stage name.
   b. Enter the stage order.
   c. Select **Submit**.
   The **Active** option can now be enabled.
7. Select **Update**.

Setup the Journey designer plan configuration review and approval process

ServiceNow administrators configure the Journey designer plan configuration feature and process.

Administrators assign the initial owners and approvers to Journey designer plan configurations.

In Journey designer, administrators can assign plan configuration owners and approvers, delegating plan configuration and maintenance. Delegating plan configuration maintenance enables people with the right expertise to maintain plan configurations.

Administrators can assign owners and approvers of plan configurations associated with departments to users in that department who are responsible for the content. Plan configuration owners and approvers don't need any elevated privileges in ServiceNow.

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Important: It's optional to assign owners and approvers to a plan configuration. Administrators have full capabilities to update and create plan configurations regardless whether there's an assigned owner.

Create Journey designer plan configuration

Create a Journey designer plan configuration in Journey designer version 2.

Before you begin
Role required: admin [sn_jny.admin]

About this task
ServiceNow administrators create Journey Plan Configurations for managers to use when creating journeys. Plan configuration owners update plan configuration to keep the plan configurations current.

After the initial plan configuration is created, admins can assign owners and approvers for plan configuration maintenance. Owners can add their own stages and task templates from the Employee Center.

Procedure

1. Navigate to **All** > **Journey designer** > **Administration** > **Manage Plan Configurations**.
2. Click **New**.
3. File out the form.
   Some fields are only available after an **Owner** is selected. For more information about the fields, see Journey designer version 2 plan configuration fields.
4. Click **Submit**.

Assign owners and approvers to a journey configuration

In Journey designer, administrators assign the initial owners and approvers to a plan configuration.

Before you begin
Role required: admin [sn_jny.admin]

About this task
Co-owners have the same capabilities as owners.

Note: Approvers are optional. If no approver is selected, the approval process isn't required.

Procedure

1. Navigate to **All** > **Journey designer** > **Administration** > **Manage Plan Configurations**.
2. Open a **Plan Configuration** to assign an owner and approver.
   Double-click the **Plan Configuration** to open it.
3. Select the **Plan Config Owners and Approvers** tab.
4. Select **New**
5. Select the search icon for the **Owner field**.
6. Start typing the name of the owner to search the list of users.

   You can click in the **Owner** field to view a list of recent selections.

   Co-owners and **Approvers** fields are available only after you select an **Owner**.

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7. Select the lock icon next to the **Co-owners** field.
8. Select a co-owner.
9. Select the lock icon next to the **Approvers** field.
10. Select **Submit**.

Change Journey designer plan configuration owners or approvers

Administrators can change a plan configuration owner or approver.

Before you begin
Role required: admin

About this task
Administrators may need to change owners or approvers for Journey designer plan configurations if people change roles or leave their job.

Procedure
1. Navigate to **All** > **Journey designer** > **Administration** > **Manage Plan Configurations**.
2. Open a **Plan Configuration** to change an owner or approver.
   Double-click the **Plan Configuration** to open it.
3. To to the **Plan Config Owners and Approvers** tab.
4. Double-click the **Name** of the owner.
5. Change the owners, co-owners, or approvers.
6. Select **Update**.

Enable the Now Assist Journey generation skill

Enable the Journey generation skill in Now Assist for HRSD using the Now Assist Admin console.

Before you begin
Role required: sn_jny.admin, sn_nowassist_admin.nsa_admin

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Skills**.
2. On the navigation panel, select **Employee**, then select **HRSD**.
3. On the **Journey Generation for Managers** card, select **Activate skill**.
4. Select **Define Trigger**, the first step in the guided setup.

   By default, many of the options in the setup are configured for the most common use cases. You might need to select the step in the guided setup navigation to go back and change the configurations in previous steps. You can also use the **Back** button to navigate through the steps.

5. Using the toggles, select what actions trigger the journey generation.
6. Select **Save and continue**.
7. Select **Select display**, then select where you would like to display the skill.

   You can select both in-product, Now Assist panel, or both.

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- **In-product**: When selected, Now Assist skills are displayed on forms and workspaces.
- **Now Assist panel**: When selected, Now Assist skills are available in the Now Assist panel. If you don't see this option, you must activate the Now Assist panel. For more information, see Turn on the Now Assist panel.

Select the arrow near the toggle to select roles for those who can access the skill. You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the X icon in the role bubble. You must have at least one role specified, but you can add as many roles as you like.

8. Select **Review and activate** to review your choices.
9. Complete the configuration by selecting **Activate**.

Create and manage stages

Create and manage stages that are contained inside a plan. Stages contain tasks or to-do lists for managers, mentors, or employees to complete.

Before you begin

Role required: admin [sn_jny.admin]

About this task

Use stages to create a logical sequence for completing tasks. Managers add stages to plans in the Employee Center.

Procedure

1. Navigate to **All** > **Journey Designer** > **Manage Stage Names**.
2. Select **New**.
3. In the **Title** field, enter a meaningful name for a stage in a plan.
   For example, Week 1, Day 1, or Month 2.
4. Select **Submit**.

Add stage configurations

Stages group tasks or to-do lists for managers, mentors, or employees as part of a plan configuration. You must set the stage order and associate the stage with a plan configuration.

Before you begin

- Role required: admin [sn_jny.admin]
- Create a stage: Create and manage stages

Procedure

1. Navigate to **All** > **Journey designer** > **Manage Task Templates**.
2. Open an existing plan configuration and navigate to the **Journey Accelerator Stage Configurations** section.
3. On the form, fill in the fields:

Journey accelerator stage configuration

Field	Description
Name	Auto-filled when you select the Stage name

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Field	Description
Stage name	Select the stage name, such as Month 2.
Stage order	Set the order for the stage in multiples of 100
Active	Option that you can select to make the configuration available for use.
Journey Accelerator plan configuration	Select the plan configuration where to add the stage

4. Select **Submit**.

Create a satisfaction score action

A satisfaction score action triggers a widget to appear to the employee, containing either a URL or request to schedule a meeting, when the specific condition is met.

Before you begin

Role required: admin [sn_jny.admin]

Procedure

1. Navigate to **All** > **Journey designer** > **Manage Journey Configurations**.
2. Select the journey configuration or create a new one.
3. Navigate to the **Satisfaction Score Actions** tab at the bottom of the page and select **New**.
4. On the form, fill in the fields:

Satisfaction score actions form

Field	Description
Condition	Set the condition that will trigger the action.
Score	Select the score to trigger the action, where 1 is the lowest and 5 is the highest possible score.
Active	Option that you can select to enable the action.
Order	Sets a ranking for the action. In the event that more than one action fulfills a condition, the action that is ranked first appears in the widget.
Action	Select what is to appear in the widget.
URL	If you selected the **Open URL** action, provide the URL to redirect the employee, such as a knowledge article.
URL label	If you selected the **Open URL** action, provide the hyper text for the link.

5. Click **Submit**.

Creating and managing audience-specific templates

Administrators can develop Journey Accelerator templates for customized plans with stages that include user tasks for different audiences.

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Create and manage action plan task templates

Create and manage the task templates that managers, mentors, and employees can use for their Journey designer plans. Use task templates to provide a consistent and streamlined experience for creating Journey designer plans.

Before you begin
Role required: admin [sn_jny.admin]

About this task
Task templates appear as to-do lists in the Employee Center for managers, mentors, or employees.

Procedure

1. Navigate to **All** > **Journey designer** > **Manage Task Templates**.
2. Click **New**, or open an existing plan configuration.
3. Fill in the fields in the template form.
   For more information see Task template fields.
4. Click **Submit**.

Manage to-do templates created by managers in Journey designer

Modify and manage to-do task templates that managers create.

Before you begin
Role required: admin [sn_jny.admin]

About this task

Procedure

1. Navigate to **All** > **Journey designer** > **Manage Manager Task Templates**.
2. Open a task template, or click **New**.
3. Modify or complete the fields in the form.
   For detailed information on the fields in the form, see Journey designer Model task fields.
4. Click **Submit** or **Update** to save the form.

Recommended learning in journey configurations

Administrators add relevant learning recommendations to a journey configuration.

The recommendations are based on the courses taken by similar employees with the same Lifecycle Events type (LE), Journey designer journeys, and Journey Accelerator plans.

- Recommended courses that are added to a journey configuration by an administrator can be modified or deleted only by an administrator.
- Recommended external courses are only available for the designated duration of the course.
- Recommended learning courses are accessible to managers and mentors that have **Can add recommended learning** permission in a journey configuration. Managers and mentors can add courses only as recommendations to an individual journey from the Employee Center. See, Display learning recommendations to the Manager creating a journey.

Add or modify recommended learning in Journey designer

Configure and manage recommended learning for employee journeys.

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Before you begin
Role required: admin [sn_jny.admin]

About this task
The Learning Posts app must be integrated with the Journey designer app for the recommended learning feature to be available. For details about Learning integration see, Learning Core.

Procedure
1. Navigate to **All** > **Journey designer** > **Administration** > **Manage Recommended Learning**.
2. Select **New**.
3. On the form, fill in the fields.

Recommended Learning for Journey Configuration

Field	Description
Journey course	A course that is available to Journey designer for use in employee journeys.
Course name	The course name is included with the Journey course
Type	Select a Journey configuration to add the recommended learning to.
Active	Select **Active** to make the Journey course available in the selected type.
Display order	The value used to order the display of multiple recommended learning entries.

4. Select **Submit**.

Note:
- Recommended learning added to a journey configuration by an administrator is included in all journeys created with that journey configuration.
- Only an administrator can delete a recommended learning entry from a journey configuration.

Related topics
Delete recommended learning in the Journey designer app

Delete recommended learning in the Journey designer app
Delete recommended learning for employee journey configurations.

Before you begin
Role required: admin [sn_jny.admin]

About this task
Recommended learning added to a journey configuration can be deleted only by an administrator.

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Procedure

1. Navigate to **All** > **Journey designer** > **Administration** > **Manage Recommended Learning**.
2. Select the check box next to the recommended course that you want to delete.
3. Select **Delete** in the **Actions on selected rows** list.
4. Select **Delete** to confirm that you want to delete the selected courses.

Configure a solution definition for the journey recommendations

Configure a solution definition to display learning recommendation to users with similar journeys.

Before you begin

Role required: admin [sn_jny.admin]

The following plugins must be activated from the ServiceNow store to display the Similar Journey based Recommendation solution definition:

- Journey Accelerator [sn_ja]
- Journey designer [sn_jny]
- The Learning Posts [sn_lc]

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity**.
2. Select **Solution Definitions** to display a list of all the solution definitions under Similarity. You will see the **Similar Journey based Recommendation** solution definition.

   Note: You can customise the solution definition according to you needs and retrain it. Open the solution definition to edit the fields

3. Open the solution definition and edit the fields to customise the solution definition according to you needs.
4. Select the **Update & Retrain** button to save the changes and train the solution definition.

What to do next

Update the solution definition in the **HR AI configuration** > **Similar Journey Users** > **Solution definition** field.

Note: For more information, see Configure the HR solution definition and domain.

Configure Journeys for Now Mobile

Configure Journey designer in Now Mobile to enable managers, mentors, and employees to interact with their journeys from their mobile devices.

Before you begin

Role required: sn_jny.admin

Plugins: Journey designer (sn_jny), Journey Accelerator (sn_ja), HR Service Delivery for mobile (sn_hr_mobile)

Assign the Journey to the employee and publish the Journey. See Create a journey

For more information on Journeys, see Journey designer.

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Procedure

1. Navigate to **All** > **Journey designer** > **Manage Journey Configurations**.
2. Click on the Journey configuration name.
3. Upload an image to appear at the top of the Journey when viewed on Now Mobile.
   For an example of how a Journey looks on Now Mobile, see Journeys on Now Mobile.

Initiate a learning task from a lifecycle event

When a lifecycle event is triggered, a learning task is created and assigned to the subject person of the case. The task is displayed in the To-dos page in Employee Center.

Before you begin

Role required: sn_jny.admin

Procedure

1. Create a learning task template.
   For more information, see Create a learning template.
2. Configure a lifecycle event activity set.
   For more information, see Configure a lifecycle event activity set.
3. Configure a lifecycle event activity.
   While creating a lifecycle activity, make sure you select **Activity Type** as **Employee**, **Employee Activity** as **Learning task**, and **HR Template** as any learning template task. For more information, see Configure a lifecycle event activity.
   When the lifecycle event is triggered, a learning task is created and assigned to the subject person of the case.

Create a learning template

Create a learning template to simplify the process of creating learning tasks by populating fields automatically.

Before you begin

Role required: learning_admin

Procedure

1. Navigate to **Learning Administration** > **Administration** > **Templates**
2. Click **New**.
3. On the form, fill in the fields as appropriate.

Learning template fields

Field	Description
Name	Name of the learning template.
Table	Table that this template applies to. Select Learning task [sn_lc_learning_task]
Template	Content that automatically populates records that are based on this template. ○ From the list, select **Learning library** and search for the library item. ○ From the list, select **Course item** and search for course item.

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Field	Description
	○ From the list, select **State** and select a state for the learning task. ○ From the list, select **Short description** and add a suitable description for the learning task.
Use global descriptions for translations	Option to enable the use of global descriptions for translations. If selected, you can provide the short description and description for the learning task template in one or more languages.
Link template	Template that links a child table with the template for the parent table. In the template for the child table, set the value to the field that references the parent table. After you set the value, the child template is explicitly linked to the parent table.
Additional fields	In the **Assign to** field, specify the user to whom the learning task is applicable.

Important: You must specify values in **Catalog**, **Course item**, **State Short description**, and **Assign to** fields while creating the template. If any of the fields is left empty, the learning task will not be created as part of the life cycle event and an error is recorded in System Logs.

4. Click **Submit**.

Employee Center (EC) homepage journey tabs widget

The Service Portal Designer contains a library of widgets to add to a service portal. The **EC homepage journey tabs widget** displays key details related to users' journeys.

Administrators can add the **EC homepage journey tabs** to their organizations Employee Center service portal. Employee Center users assigned to a journey see information relevant related to their journey.

Involved journeys

Mentors see the **Involved journeys** tab.

My journeys

Users that are assigned to a journey see the **My journeys** tab.

Team journeys

Journey owners with active journeys for their team see the **Team journeys** tab.

Add Journey designer widget

The Journey designer widget is not on the Employee Center home page by default. An administrator must add it.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. Select **Employe Center Homepage**.
4. In the **Filter Widget** field, type `EC homepage Journey Tabs`.

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5. Drag the **EC homepage Journey Tabs** widget to the service portal page.
   Add the `EC homepage Journey Tabs` to any valid element on the page.

What to do next

Verify that the widget is available in your organization's Employee Center portal.

1. Login as a user that has permissions to view or modify journeys.
2. Verify that the title *`Team journeys`* is visible.

Enable and configure the Pre-hire Experience

Enable access to the Pre-hire experience and configure its components so your organization can use the Journey designer app to facilitate the preboarding process. You must activate and configure the components for the Pre-hire experience so newly hired employees can use the onboarding portal to embark on their first journey.

To enable and use the Pre-hire experience, you must satisfy the following minimum system requirements:

- Upgrade your instance to the Zurich release.
- Upgrade the Journey designer application to version 7.0.
- Install and activate the Explicit Roles [com.glide.explicit_roles] plugin.

Deactivate an obsolete Lifecycle Events activity

Journey designer customers must deactivate the following Lifecycle Events activity to initiate the process for enabling the Pre-hire experience: Account setup and notification. The Account setup and notification activity must be deactivated so you can use its replacement, a new Lifecycle Events activity that's designed to support the Pre-hire experience.

Before you begin

Role required: admin [sn_jny.admin]

Procedure

1. Navigate to **All** > *`Lifecycle Events`* > **Administration** > **Manage** *`Lifecycle Events`*.
2. Select **Onboarding (Demo)**.
3. Select the **Activity Sets** tab.
4. In the Pre-Hire activity set column, select the **Edit Activity** icon associated with the Account setup and notification activity.
   The Activity record appears.
5. Clear the **Active** check box and then select **Update**.
   The Account setup and notification activity is inactive.

What to do next

Activate the following Lifecycle Events activities to enable support for the Pre-hire experience:

- Account/role setup and notification
- Transition pre-hire to employee

Activate new Lifecycle Events activities

Journey designer customers must activate the following Lifecycle Events activities to enable support for the Pre-hire experience: Account/role setup and notification and Transition pre-hire to employee. These activities facilitate the transition of roles through which the employee navigates during the preboarding process.

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Before you begin
Role required: admin [sn_jny.admin]

About this task
The Account/role setup and notification activity is used to facilitate the employee's transition from the applicant role to the pre-hire role. This activity performs the following actions when the Pre-hire activity set is triggered:

- Creates an account for the employee to enable access to the onboarding portal.
- Adds the sn_jny.pre_hire and snc_external roles to the employee's user record.
- Sends an email to the employee with a link to the onboarding portal.

The activity set in which this activity is nested is triggered immediately after you create an onboarding journey that uses the following Lifecycle Events type: Onboarding (Demo).

The Transition pre-hire to employee activity is used to facilitate the employee's transition from the pre-hire role to the internal employee role. This activity performs the following actions when the Day 1 activity set is triggered:

- Removes the sn_jny.pre_hire and snc_external roles from the employee's user record.
- Adds the snc_internal role to the employee's user record.

The activity set in which this activity is nested is triggered when the date in the **Employment start date** field in the HR profile record of the onboarding employee is equal to the system date.

Procedure
1. Navigate to **All** > *Lifecycle Events* > **Administration** > **Manage** *Lifecycle Events*.
2. Select **Onboarding (Demo)**.
3. Select the **Activity Sets** tab.
4. In the Pre-Hire activity set column, select the **Edit Activity** icon associated with the Account/role setup and notification activity.
   The Activity record appears.
5. Select the **Active** check box and then select **Update**.
   The Account/role setup and notification activity is active.
6. In the Day 1 activity set column, select the **Edit Activity** icon associated with the Transition pre-hire to employee activity.
   The Activity record appears.
7. Select the **Active** check box and select **Update**.
   The Transition pre-hire to employee activity is active.

What to do next
Configure the widgets for the Pre-hire experience to ensure that they meet your organization's specifications.

Configure the Start onboarding widget

Journey designer administrators can configure the Start onboarding widget to create a banner that's used for welcoming an onboarding employee to your organization. Administrators can configure the content and design associated with the banner to meet the needs of your organization.

Before you begin
Role required: admin [sn_jny.admin]

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Procedure

1. Navigate to the **All** menu, and enter `sn_cd_content_base.list` in the navigation filter.
   The Content [sn_cd_content_base] table appears.
2. Select **Title** from the drop-down list associated with the **Search** field.
3. In the **Search** field, enter `start onboarding`.
   The Start Onboarding record appears.
4. Select **Start Onboarding**.
   The Start Onboarding form appears.
5. Select **Checkout**.
   The fields in the form become available to edit.
6. Fill in the fields in the Start Onboarding form.
   For more information about the fields associated with this form, see Create customized media with styled content.
7. Specify whether you want to save your design or save and publish your design.

Option	Description
Save	To save the record and remain on the **Design** tab.
Save and continue	To save the record and move to the **Publish** tab.

Configure the Our culture widget

Journey designer administrators can configure the Our culture widget to enhance the employee's onboarding experience using rich content. Rich content includes videos, images, or other forms of engaging media to provide the onboarding employee an immersive experience.

Before you begin

Role required: admin [sn_jny.admin]

Procedure

1. Navigate to the **All** menu, and enter `sn_cd_content_base.list` in the navigation filter.
   The Content [sn_cd_content_base] table appears.
2. Select **Title** from the drop-down list associated with the **Search** field.
3. In the **Search** field, enter `our culture content`.
   The Our culture content record appears.
4. Select **Our culture content**.
   The Our culture content form appears.
5. Select **Checkout**.
   The fields in the form become available to edit.
6. Fill in the fields in the Our culture content form.
   For more information about the fields associated with this form, see Create rich content.
7. Select **Open editor**.
   The information you entered in the form is saved.

Configure the Getting started resources widget

Journey designer administrators can configure the Getting started resources widget to provide quick links that give access to internal and external resources. Administrators can provide

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links to knowledge base articles, catalog items, pages, or other pertinent information that your organization deems beneficial for an onboarding employee.

Before you begin

Role required: admin [sn_jny.admin]

Procedure

1. Navigate to **All** > **Service Portal** > **Pages**.
2. Select **ID** from the drop-down list associated with the **Search** field.
3. In the **Search** field, enter `*jny`.
   A list of pages associated with the Journey designer app appears.
4. Select **jny_journey_onboarding_details**.
   The Page form appears.
5. Under Related Links, select **Open in Designer**.
   The Service Portal Designer displays the Journey designer Onboarding page.
6. Select the **Edit instance options** icon associated with the Getting started resources widget.
   The Getting started resources dialog box appears.
7. Select **Quick links**.
   For more information about quick links, see Quick links.
   A drop-down list with quick links that are defined in the Quick Links [sn_ex_sp_quick_link] table appears.
8. Select a quick link that you want to add to the Getting started resources widget.
9. Select **Save**.

Integrations for Journey designer app

Extend the Journey designer application's capabilities by integrating other applications into the journey experience.

Integrating supported applications expands the features and capabilities of Journey designer. Supported applications have unique installation and configuration requirements. Supported integration applications can be installed before or after installing the Journey designer app.

- Manager Hub v1.0.0 [sn_mh]
- Microsoft Exchange Online spoke v3.2.0 [sn_ex_online_spke]
- Retry Handler Framework v1.0.1 [sn_handler]

  The Retry Handler Framework is required when using the Microsoft Exchange Online spoke.

Integrating Manager Hub with Journey designer

Integrate Manager Hub with Journey designer to facilitate daily activities among various cross-functional processes and departments, and automate processes such as new hire onboarding.

Follow the instructions in the Manager Hub documentation to install and configure the application for Journey designer.

Related topics

Manager Hub

Integrating Microsoft Exchange Online spoke with Journey designer

The Microsoft Exchange Online spoke integration with Journey designer is achieved with Journey Accelerator.

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Follow the setup and integration instructions from Journey Accelerator.

Microsoft Exchange Online setup for Journey Accelerator

By integrating the Journey Accelerator scheduling feature with the Microsoft Office 365 calendar function, users can schedule plans and to-do tasks.

Update system properties for Microsoft Exchange Online in the Journey Accelerator app

Update the Journey Accelerator app system properties to use with Microsoft Exchange Online features support by Journey Accelerator.

Integrating HR Service Delivery Virtual Agent Conversations app with Journey designer

Install the HR Service Delivery Virtual Agent Conversations app to enable Journey designer to send actionable notifications as nudges to employees and managers on configured communications channels.

The HR Service Delivery Virtual Agent Conversations app displays action buttons to enable interactions and complete the actions. Using HR Service Delivery Virtual Agent Conversations app aids faster approvals and task completion by engaging employees and managers on the channels that they are at.

Activation information

Install the latest version of HR Service Delivery Virtual Agent Conversations [sn_hr_va] to enable actionable notification in Journey designer.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Integrating the Learning Posts app with Journey designer enables you to manage recommended learning for journeys from inside Journey designer.

Predefined Virtual Agent notifications for HR Service Delivery

The HR Service Delivery Virtual Agent Conversations app provides predefined notifications to help your employees, mentors, and managers receive information about the common tasks in HR Service Delivery.

Notifications are sent to employees, managers, and mentors that are associated with a journey. The following HR Service Delivery Virtual Agent notifications are available:

- New Journey created – Notify Employee
- New Journey created – Notify Manager
- New Journey created – Notify Mentor
- New Mentor(s) added – Notify Manager
- New Mentor(s) added – Notify Employee
- New Mentor(s) added – Notify Mentor
- Journey Tasks Overdue
- Journey JA task Commented
- Journey LE task Approval Requested

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Note: For a holistic experience of the journey outcome in Virtual Agent, turn on all the six Journey created scenario notifications (Manager, Mentor, and Employee).

For more information about HR Service Delivery Virtual Agent Conversations and topic blocks, see Virtual Agent for HR Service Delivery.

Actionable notification in the Journey designer app

Journey designer use case: When notifications are configured, a notification is sent when a new journey is created and published. The employee is notified of it on the configured CI channel. The manager is prompted to add a mentor. After the mentor is added, notifications are sent to the employee and the mentor.

Virtual Agent Designer

As and admin, go to **Conversational Interfaces** > **Virtual Agent** > **Designer**. Filter on the following:

- **Type** = `Topics`
- **Category** = `HRSD Actionable Notifications`
- **Status** = `Active`

There are four action topics linked to Journey designer provided in the base system of the application.

- _add_comment_to_ja_task - Add a comment. These comments are alsi displayed in the journey task activity.
- _add_mentor_to_journey - Add a mentor. You can select a mentor from the list provided by the Virtual agent or search a person by typing the name.
- _approve_le_approval_activity - Approve the request assigned as a part of the journey.
- _reject_le_approval_activity - Reject the request assigned as a part of the journey.

You can also associate other actions with the notifications. For more information, see Add actions to the notification content.

Using Journey designer

Journey designer enables managers, mentors, and employees to create and manage personalized journeys through configurable templates. It allows users to guide and track individual progress with access to dashboards and reports, while leveraging the Now Assist Virtual Agent for automated support.

Journey designer

Journey designer plan configuration template process, owners, and maintenance

Journey plan configuration template management is a collaborative effort that includes ServiceNow admins, journey template owners, and team experts.

Creating and managing journeys needs the knowledge and skills of many people. Responsibilities for keeping journey stages and task current aren't always clearly defined. Journey designer enables a journey administrator to orchestrate and delegate all the activities needed to create and maintain journeys.

Note: An administrator must assign owners and approvers to Journey designer plan configurations. For more details, read Setup the Journey designer plan configuration review and approval process

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ServiceNow application administrator

- Sets up, configures, and maintains your ServiceNow instance, including features such as creating and updating plan configurations.
- Assign Journey designer plan configuration owners and approvers.
- Maintain oversight of journey configuration creation and modification process.

Journey owner

- Maintain plan configurations and initiate the approval workflow for plan configuration.
- Update and publish changes to plan configurations.
- Create and change task templates for your audience.
- Add or update stages in a journey.

Journey approver

- A subject matter expert (SME) with specialized knowledge about an area in a journey as it relates to business needs, individual roles, and responsibilities.
- Approvers are assigned approval tasks when a journey configuration is created or modified.

Related topics

Setup the Journey designer plan configuration review and approval process

Assign owners and approvers to a journey configuration

Journey designer plan configuration owners

Plan configuration owners create and update plan configurations and publish changes.

ServiceNow application administrators assign plan configuration owners. The owners of a plan configuration publish updates for review and approval. The decentralized approach to plan configuration ownership and approval supports a workflow for area experts to customize and maintain plan configurations. These plan configurations are called journey templates in the Employee Center .

Owner

Owners are assigned by ServiceNow administrators. A plan configuration owner has expertise related to the plan configuration needs of a logical area.

Co-owner

Co-owners are assigned by ServiceNow administrators and have all the responsibilities of an owner.

Update and publish changes to plan configurations

Plan owners update plan configurations and publish the changes for review and approval.

Before you begin

Role required: Owner or co-owner of a Journey designer plan configuration.

About this task

Journey designer plan configuration owners update and publish plan configurations from the Employee Center service portal.

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Important: In the Employee Center, Plan configurations are also referred to as Journey templates.

Plan configuration owners can:

- Add, reorder, rename, or delete stages.

  Note: Only empty stages can be deleted.

- Add task templates to a stage.
- Create a task template.
- Preview a template as a selected employee.
- Publish a journey template (plan configuration) for approval by reviewer.

  Note: If a plan configuration doesn't have any assigned approver, the plan configuration is immediately published when the changes are submitted.

- Plan configurations that are published and currently in use aren’t impacted by changes.

Procedure

1. From the Employee Center service portal, navigate to **Journeys** page.
2. Select the **Journey templates** tab.
3. Select the plan configuration that you want to update.
4. Update the plan configuration.

   Owners and co-owners can change different parts of the plan configuration.

   - **Stages**: logical containers of task templates.
   - **Task templates**: individual tasks assigned to employees, mentors, or managers.

   For details about the see, Journey designer journey template reference.
5. Select **Publish journey template**.

   Note: Only new task templates need an approval.

6. Select **Submit**.

   After the request is submitted, an approval task is sent to all the approvers assigned to the plan configuration.

   Important: Only one approval triggers the publication of the plan configuration. If an approval is needed from a certain approver, owners should let all the approvers know.

   Owners and co-owners can cancel an approval request as long as an approver hasn’t approved or rejected the request.

Create and update task templates for plan configurations

Plan owners create and update task templates that are used in plan configurations.

Before you begin

Role required: Owner or co-owner of a Journey designer plan configuration.

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About this task

Journey designer plan configuration owners can change or create task templates for a plan configuration.

- Add task templates to a stage.
- Create a task template.
- Preview a template as a selected employee.
- Publish a journey template (plan configuration) for approval by reviewer.

> **Note:** If a plan configuration doesn't have any assigned approver, the plan configuration is immediately published when the changes are submitted.

- Plan configurations that are published and currently in use aren’t impacted by changes.

Procedure

1. From the Employee Center service portal, navigate to the **Journeys** page.
2. Select the **Journey templates** tab.
3. Select the plan configuration that you want update.
   Owners can add task templates to a stage or update a template already in a stage.
4. Add or update a task template.

Options	Description
Add task template	**a.** Select **Add task template** for the **Stage** that includes the task template you’re adding a task template to. **b.** Select **Use task templates** and click **Next**. **c.** Select all the templates that you want to add. **d.** Select **Use templates**. **e.** Select **Add Templates**.
Update task template	**a.** Select **Edit task template** next to the task template that you’re changing. > **Tip:** **Edit task template** is listed un der the vertical ellipses. **b.** Update the task template. **c.** Select **Publish changes**.

5. Select **Publish changes**.
6. In the **Submit for approval** window, add information about the changes.
   Add any necessary instructions for approvers.

> **Note:** Plan configurations need only one approval to be published. If you have multiple approvers for a plan configuration, communicate any special instructions for the review and approval workflow to all approvers.

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7. Select **Submit**.
   An approval request task is sent to each of the approvers for the plan configuration.

Add or update stages in a journey plan configurations

Owners add or update the stages in journey plan configurations.

Before you begin

Role required: Owner or co-owner of a Journey designer plan configuration.

About this task

Journey designer plan configuration owners can change or create task templates for a plan configuration.

- Add stages
- Delete stages. A stage must not have any task if you want to delete it.
- Publish a journey template (plan configuration) for approval by reviewer.

  Note: If a plan configuration doesn't have any assigned approver, the plan configuration is immediately published when the changes are submitted.

- Plan configurations that are published and currently in use aren’t impacted by changes.

Procedure

1. From the Employee Center service portal, navigate to the **Journeys** page.
2. Select the **Journey templates** tab.
3. Select the plan configuration that you want update.
   Owners can:
   - Reorder stages
   - Change stages
   - Create additional
4. Make the changes to the plan configuration.
5. Select **Publish changes**.

   Note: Plan configurations need only one approval to be published. If the changes require review by a certain approver, be sure to communicate special instruction for approval to all approvers.

6. Add details about the changes to the **Additional details** field.
7. Select **Submit**.

Journey designer plan configuration approvers

Plan configuration approvers review and approve plan configurations.

ServiceNow administrators assign plan configuration approvers for different plan configurations. Approvers are assigned by ServiceNow administrators. Approvers are subject matter experts (SME) with specialized skills related to plan configurations. When an owner publishes updates to a plan configuration an approval task is created for any approvers.

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Review and approve plan configuration changes

Approvers receive approval tasks to track reviewing, approving, and rejecting changes to a plan configuration.

Before you begin

Role required: assigned as approver for a plan configuration

About this task

Approver

Plan configuration approvers are assigned to a plan configuration by a ServiceNow administrator. Approvers are responsible for reviewing changes that were made by a plan configuration owner. An approver can choose to accept or reject the changes.

Owner (or co-owner)

Changes plan configuration, and publishes the changes which initiate the plan configuration approval workflow.

Procedure

1. From the Employee Center service portal, navigate to **Journeys** page.
2. Select **My Tasks**.

   Find the **Approve Request** task that you want to approve or reject.

   An approval request looks similar to this example.

```
Approve Request

Sales Employee Plan Configuration (Demo)

Due in 7 days
```

3. Review the changes.

Options	Description
Approve or Reject changes	○ **Approve**: Immediately publishes the changes. ○ **Reject**:
View comment added by the owner	**a.** Select the link to the plan configuration de tails. **b.** Select the **Activity** tab. **c.** Review the comments for any special in structions. **d.** Select **My Tasks** to go back to the approval task, and **Approve** or **Reject** add the rea son you're rejecting the changes. **Note:** Approving the changes imme diately publishes the changes. **e.** Select **Reject**.

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Note: The changes in the request need only one approval to be published. Make sure you understand all the changes to the plan configuration.

The right pane includes the details of the approval. You can **Reject** or **Approve** the changes.

Managers, mentors, and employees work with journeys in the Employee Center

Managers, employees, and mentors access journeys from the Employee Center (EC).

From the Employee Center, users can create, modify, and complete journeys depending on their assigned permissions and roles.

- Employees can: View their journey and complete assigned tasks.
- Managers can: Create and modify journeys, assign mentors, modify user permission for a journey, and monitor journey analytics. Managers create and modify journeys, add additional mentors, add recommended learning, add quick links, and add personalized messages.
- Mentors can: Help employees successfully complete a journey. Mentors with the assigned permission can modify journeys, add additional mentors, add recommended learning, add quick links, and add personalized messages.

Note:

- Journeys are available from the Now Mobile app. See Journeys on Now Mobile
- The total task count in the journey progress bar may be different from the **Journey overview All tasks** count. This total task count discrepancy is because the **Journey overview** count displays the task count for only those tasks the employee has access to.

Some features may require integration with a related application, see Integrations for Journey designer app.

Journey view for a manager

As a manager, here's how you can view all your journeys and your team's journeys in Journey designer on the Employee Center portal.

The Journeys page on Employee Center portal provides you with a bird's eye view of all your journeys, your team's journeys, involved journeys, and other information.

My team's journeys

The My team's journeys is the first page that you see when you access Journeys after navigating from Employee Center. Use this page to quickly identify journeys that are assigned to your team, visualize recent progress. You can also create journeys, see Create a journey

My journeys

Use the My journeys tab to view tasks that need your attention on the **Your next tasks** widget, see View and update your next tasks. You can also view all of the other journeys assigned to you, and view each one or update the status, see Journey view for an employee.

Involved journeys

Use the Involved journeys tab to stay on track and updated about they journeys that involve you but are not assigned to you or your immediate team members.

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Task templates

Use the Task templates tab to create templates of tasks, such as scheduling a meeting or taking a learning course, to assign to employees' journeys. For more information, see Create a task template.

Note: As an admin, you have the option to hide the Task templates widget from the journey widget configuration page.

Create a journey

Users that are managers and have Modifier [sn_jny.writer] permission create journeys for employees and assign mentors to help with the journey.

Before you begin

Role required: A user must manage other users to have access to create journeys.

About this task

The user that creates a journey is the journey owner. Journey owners create, modify, and manage all aspects of a journey.

Procedure

1. From the Employee Center, select **Journeys**.
2. Select **Create a new journey**.
   Journey templates have preconfigured journey configurations. Your organizations administrator creates and manages journey configurations.
3. Select a journey template to use an existing journey configuration or select **Blank** to create your own journey.
4. Complete the form to create a journey.

Let's start with a few details about this plan form

Field	Description
This journey is for	Name of the employee that this journey is for.
Journey name	Descriptive name of the journey.
Journey mentor	Mentors that you can select. You can also set the mentors' view or edit permission. You can add up to 5 mentors.
Journey description	Details about this plan.

5. Select **Create journey**.

What to do next

Journey owners and mentors with permission can edit existing journeys.

- Add Journey Accelerator tasks to a Journey.
- Add Journey Accelerator stages to a journey.
- Drag stages and tasks within a journey to change the order.
- Add a mentor.
- Publish the journey.
- Add recommended learning and quick links.

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Create a journey using Now Assist

Create and modify journeys for employees using Now Assist.

Before you begin

Role required: manager

Install the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).

About this task

The user that creates a journey is the journey owner. Journey owners create, modify, and manage all aspects of a journey.

Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Select **Journeys**.
3. Select **Create a new journey**.
   Journey templates have preconfigured journey configurations. Your organization administrator creates and manages journey configurations.
4. Select **Build with Now Assist**, then select **Next**.
5. On the form, fill in the fields.

Add some details and Now Assist will generate a journey draft

Field	Description
This journey is for	Name of the employee that the journey is for.
Write the directions or use an example	Describe the journey that you want to create. Use a minimum of 60 characters to describe your journey. Select a pill to view sample directions for journeys. Sample prompts that you can use include: ○ Create a personalized career development journey for Sarah Johnson, a junior software developer aiming to transition into a senior role: The journey should include stages such as "Identify skill gaps in leadership and advanced programming," "Enroll in targeted training programs like leadership workshops and advanced coding bootcamps," and "Conduct quarterly reviews with the manager to track progress and adjust goals." The journey should span over 6 months. ○ Design an onboarding journey for Sarah Lee, a new marketing manager: The journey should include stages like "Send a personalized welcome email with team introductions," "Provide training on the company's marketing tools and internal systems," "Attend the first strategy meeting to understand ongoing campaigns," and "Deliver the first project task, such as drafting a marketing campaign plan." The journey should be structured to span over 4 weeks and prioritize both acclimation and quick contributions.

6. Select **Generate draft**.
7. **Optional:** Modify your journey directions.

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a. Select **Edit Directions.**

b. Describe the journey that you want to create.

c. Select **Regenerate draft**.

Activate the Journey Summarization for Managers skill

Activate the Journey Summarization for Managers skill in Now Assist for HRSD using the Now Assist Admin console. Managers use this generative AI skill to produce and view a summary of an employee's journey based on the information that appears on the Journey detail page.

Before you begin

The Now Assist for HR Service Delivery (HRSD) (sn_hr_gen_ai) plugin must be installed.

This skill, driven by generative AI, produces a summary that managers can view to acquire the following information about an employee's journey:

- An overview of the journey
- Blockers that are impeding the journey's progress
- The next steps that should be taken to resume the journey's progress

Role required: [sn_jny.admin], [sn_nowassist_admin.nsa_admin]

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.
   The Now Assist Admin console appears.
2. On the navigation panel, select **Employee** > **HRSD**.
   The Now Assist for HRSD skills appear.
3. Select **Activate skill** on the **Journey Summarization for Managers** card.
4. Use the guided setup to accept the default configurations for this skill or to configure the skill to your specifications.
   During the guided setup, select **Save and continue** to navigate to the next page in the configuration process or **Back** to navigate to the previous page.
5. Select **Activate** on the final page of the guided setup to complete the configuration process.
   A dialog box displays the following message: `Journey Summarization for Managers is now active for HRSD!`

Summarize a journey with Now Assist for HR Service Delivery (HRSD)

Managers can instantly summarize the information that appears on the Journey detail page to acquire an overview of an employee's journey. This summary also reflects the blockers that are impeding the journey's progress and the steps required to resume the journey's progress.

Before you begin

The Now Assist for HRSD (sn_hr_gen_ai) plugin must be installed and the Journey Summarization for Managers skill must be activated.

Role required: manager [sn_jny.reader or sn_jny.writer]

About this task

The following sections appear in the summary that is generated:

Overview

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This section provides the manager with the journey's progress by reflecting the percentage of the journey that is complete and whether there are any risks affecting this journey.

Blocker

This section provides the manager with the overdue tasks that are blocking the journey's progress. This section also reflects the activity sets in which the overdue tasks are nested, and the activity sets that are affected by the overdue tasks.

Next Steps

This section provides the manager with the next steps that either they, their employee, or another team member should take to resume the journey's progress.

Procedure

1. Navigate to **All** > **Employee Center** > **Journeys**.
2. Select a journey for an employee on your team.
   The Journey detail page for the employee you selected appears.
3. Select **Summarize** in the Now Assist can summarize this journey widget.
   A summary of the employee's journey is generated and includes the following information:
   - An overview of the journey
   - Blockers that are impeding the journey's progress
   - The next steps that should be taken to resume the journey's progress
4. Review the summary to acquire pertinent information about your employee's journey.

Cancel Journey Accelerator Journeys

You can now cancel Journey Accelerator only journeys from the Employee Center portal.

Before you begin

Role required: admin [sn_jny.admin]

Procedure

1. Navigate to **All** > **Employee Center** > **My tasks**.
2. Select a Journey Accelerator journey.
3. Select **Cancel**.

Create a task template

Journey owners (managers) and mentors create templates of tasks, such as scheduling a meeting or taking a learning course, to assign to employees' journeys.

Before you begin

Role required: Modifier [sn_jny.writer]

Procedure

1. From the Employee Center, navigate to **Journeys** > **My templates**.
2. Select **Create task template**.
3. On the form, fill in the fields:

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Create a task template form

Field	Description
Task type	Option to select a task type to display other fields in the form. ○ **General Task** ○ **Schedule a meeting** ○ **Take a learning course**
Task name	A descriptive name of the task.
This task is for	Option to select from a list of user types employee, manager, mentor, or specify the name of the employee that this task is for.
Watchlist	Option to add additional people to be notified about this task.
Share with	Option to share the task template with other employees.
Task description	Details about this task.
Due Date	Option to select by when the employee must complete the task.
This task is optional	Option to set this task to optional.

4. Select **Create task template**.

Add task template to journey

Use task templates to quickly add pre-configured tasks to an employee's journey, such as scheduling a meeting or taking a learning course.

Before you begin

- Role required: Modifier [sn_jny.writer]
- Create a journey
- Create a task template

Procedure

1. From the Employee Center, navigate to **Journeys** > **My team's journeys** and scroll to the **Journeys for my team** section.
2. Select the Journey where to add the task template.
3. Navigate to the stage where to add the task and click **Add tasks**.
4. Select **Use task templates**.
5. Select **Create task template**.
6. Select from the available task templates and click **Use template**.

Mentors can modify and manage journeys

Mentors with the appropriate permission can modify journeys and add other mentors.

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Before you begin
Role required: Modifier [sn_jny.writer]

Procedure

1. From the Employee Center, select **Journeys**.
2. Select the **Involved journeys** tab, and select the journey you want to update.
3. Select **Edit Journey**.

   Add a mentor

   Select the **Mentor** edit icon to add additional mentors to the journey. Add mentors who have unique skills to share with the employee.

   Add a stage

   Select **Add a stage** to create a state in the journey. New stages can be helpful to provide additional training or resources from the original journey.

   Add tasks

   Select **Add tasks** to add additional tasks to an existing stage of a journey. New tasks give employees access to additional training and other resources.
4. Select **Finish editing**.

What to do next
With the correct permissions, Journey mentors can edit existing journeys. Mentors can:

- Add Journey Accelerator tasks to a Journey.
- Add Journey Accelerator stages to a journey.
- Drag stages and tasks within a journey to change the order.
- Add a mentor.
- Publish the journey.
- Add recommended learning and quick links.

Add, edit, or delete journey quick links

Journey owners and mentors add, edit, and delete quick links in a journey.

Before you begin
Role required: Journey owner or Journey Mentor with **Can add quick links** permission.

About this task
Journey owners and mentors have permissions assigned to them from a Journey Configuration. The permission the enable owners and mentors to add, edit, or delete quick links to a journey is **Can add quick links**. Owners and mentors with this permission can add valid URLs to an individual journey as a quick link.

Note: If the **Quick links** widget is not visible in a journey, the **Can add quick links** is not configured in the Journey Configuration. Only administrators can update the permissions for the journey configuration. See, Update users' permissions for journeys.

Procedure

1. From the Employee Center, navigate to **Journeys**.
2. Open the journey to add the quick link to.

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The **Quick links** widget is at the bottom right of the journey page. You can also add quick links when you are creating a journey. See, Create a journey.

3. Select **Add a link** and fill in the fields.
   - **Link text**: The text that is visible in the journey.
   - **Link address**: A valid URL.
4. Select **Add link**.
   Select the more icon to edit or delete a link.

Journey view for an employee

As an employee with journeys in Journey designer, view your journey overview and tasks associated with that journey in Employee Center.

The Journeys page on Employee Center portal provides you with a bird's eye view of all your journeys, your team's journeys, involved journeys, and other information.

Journey overview

Gives you an overview of all the journey details. Use the filters available to look at various tasks on Employee Center. Use the filters available to look at various tasks.

- Your tasks
- Overdue
- Due soon
- All tasks

Activity

Use the Activity tab to add any journey activity updates in the activity field and post it to keep a tab of the progress in the journey.

Attachments

Use the Attachments tab to add supporting attachments to the journey, if needed.

Employees view and complete journeys

Employees have access to the journeys that are assigned to them.

Before you begin
Role required: Employee with HR profile

About this task
Any employee assigned to a journey can view the journey to complete tasks that are part of the journey. Employees access assigned journeys from the Employee Center.

Procedure

1. In the Employee Center portal, select **Journeys**.
2. Select the journey that you want to work on.

   Stages contain the tasks for you to complete.

3. To view details about a particular task and to manage its progress, select that task.

   Tasks have a process or steps that you take to complete the task.

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Note: The total task count in the journey progress bar may be different from the **Journey overview Your tasks** count. This total task count discrepancy is because the **Journey overview** count displays the task count for only those tasks the employee has access to.

The following table reflects the status of a journey based on whether overdue tasks exist for the journey or the subject person to whom the journey belongs:

Journey status experience

Journey status	Persona	Subject person has overdue tasks	Other person has overdue tasks	Visible tasks	Invisible tasks	Message
Overdue	Employee/ Mentor	Yes	No	Yes	No	No message
Overdue	Employe/ Mentor	No	Yes	Yes	No	Your journey is overdue because tasks assigned to other people haven't been completed yet.
Overdue	Employee/ Mentor	No	Yes	No	Yes	Your journey is overdue because some tasks haven't been completed. You may not be able to see them because they are assigned to other people.
Overdue	Manager	Yes	No	Yes	No	No message
Overdue	Manager	No	Yes	Yes	No	Your journey is overdue because tasks assigned to other

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Journey status	Persona	Subject person has overdue tasks	Other person has overdue tasks	Visible tasks	Invisible tasks	Message
						people haven't been completed yet.
Overdue	Manager	No	Yes	No	Yes	This journey is overdue because some tasks haven't been completed. You may not be able to see them because they are assigned to other people.

Configure task count for your next tasks widget

You can configure how many tasks you want to see in your next tasks widget.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System definition** > **Script includes**.
2. Search for the `jnySNC` script include entry in the name field and select it.
3. Edit the following script to change the number of tasks you want shown on your next tasks widget.

```
//tasks limit
jnySNC.MY_JOURNEY_NEXT_TASKS_LIMIT = 10;
```

Note: Here the number of tasks limit is set to 10, you can update it to any number you'd like.

View and update your next tasks

View your next tasks using the **Your next tasks** widget on the My journeys page to understand the next steps in your journey.

Before you begin

Role required: employee

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Procedure

1. Navigate to **All** > **Employee Center** > **Journeys** > **My Journeys**.
2. Your next tasks widget will show you the next ten tasks that need your attention.
3. Select a task that you want to update.
4. Select **Complete** if the task is complete or select **Mark as in-progress** if you are still working on the task.

Manage Journey designer task updates in bulk

Many journeys have similar task types for multiple users. You can update similar task types in bulk for journeys of the same type.

Managers and other journey participants that regularly manage journey tasks can update certain types of task in a single action. Journey designer identifies similar task types that are present in similar journeys. Similar tasks can be managed in bulk instead of managing each task in each journey type.

There are a limited number of task types available for bulk update.

- Approval [sysapproval.approver]
- Mark when complete [mark_when_complete]
- Submit catalog item [submit_catalog_item]
- Submit order guide [submit_order_guide]

The bulk update feature is enabled for up to 50 journeys.

Update similar tasks in bulk

Managers, mentors, and other journey participants with access to certain Journey designer task types are able to update similar tasks identified by Journey designer in a single action.

About this task

There are four Journey designer task types available for bulk update:

- Approval [sysapproval.approver]
- Mark when complete [mark_when_complete]
- Submit catalog item [submit_catalog_item]
- Submit order guide [submit_order_guide]

Note: The completion workflow for the different task types is unique. The steps in this task are a general representation of how to complete a bulk update.

Before you begin

Role required: you can use bulk update for any available Journey designer tasks that you have write permission for.

Procedure

1. From the Employee Center, navigate to **My Tasks**.
2. Select a task to update.

   Similar tasks that are available for bulk update display a message indicating that there are other tasks that you can update at the same time.

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3. Select **Select more**

   When there are multiple tasks available, a list of those tasks is displayed. Task must be a similar type in the same journey type to be eligible for bulk update.

   You can select any or all tasks in the list of tasks available. You can work on only those tasks that need attention.

4. Select **Continue**.
5. Select **Next**.
6. Complete the task.

   Depending on the task type, the completion of the task is unique to the task type.

   Note: Some tasks may be optional. Optional tasks can be skipped. Required tasks can't be skipped.

Send a personal message to journey users

Journey owners and mentors with the **Can add personalized message** permission can send a personal message to the employee assigned to a journey.

Before you begin

Role required: Managers and mentors with **Can add personalized message** permission

About this task

The personalized message feature requires that the **Can add personalized message** is enabled for journey owners or mentors. This permission is set for each journey configuration. See, Update users' permissions for journeys.

The **Send a note** button is only visible in published journeys.

Procedure

1. From the Employee Center, select **Journeys**.
2. Create and publish a journey, or open an existing journey that has been published.
   Journey configurations with the **Can add personalized message** enable a **Send a note** button.
3. Select **Send a note**.
   You can modify the note and add attachments.
4. Select **Send** to send the note to the user.
   An email is sent to the email address that is in the HR profile.

Related topics

Journey designer user permissions reference

Display learning recommendations to the Manager creating a journey

Enable manager who is creating a journey for an employee, to add relevant learning recommendations for the employee in the Employee Center.

Note: Make sure the manager has **Can add recommended learning** permission to add courses to the employees journey. For more information, see Recommended learning in journey configurations.

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Learning recommendations can be added from **Add courses** option at the bottom left of the journey page. Courses are displayed under the **Recommended courses** section. The courses are from external learning partners like Udemy, Pluralsight, and Cornerstone.

The courses displayed are based on solution definitions **Similar journey based recommendations** created under Similarity. The recommendations are based on the courses taken by similar employees with same Lifecycle Event type (LE) and Journey Accelerator action Plan (JA plan type). For more information, see Configure a solution definition for the journey recommendations.

Note:

- Courses that are accessible to the manager are only displayed as recommendations.
- To receive latest recommendations, update the solution definition regularly.

Add recommended learning to a journey

Managers and mentors with **Can add recommended learning** are able to add courses to a journey.

Before you begin

Role required: Manager or mentor

Note: Select the option **Can add recommended learning** in **Manage journey configuration** > **Journey owners permissions** to display the **Add courses** button on the Employee Center.

Procedure

1. From the Employee Center, select the **Journeys** page.

   Note: The **Journeys** page is displayed only if the logged in user is a manager and has one reporting employee.

2. Select a journey to edit it.
3. Select the **Add courses** button on the Recommended learning widget.
4. Select a course by typing the name in the search bar or choose a course from the list.
5. Click the **+Add** button by the course to add it.
6. Click **Add course** to add the selected course(s) to the widget.

Journeys on Now Mobile

Journeys are created in the ServiceNow® Journey designer application to help employees navigate multi-step transitions, such as onboarding, maternity leave, or an interdepartmental transfer. The Now Mobile application enables users to perform journey-related tasks from the convenience of their mobile device.

Using Journeys on Now Mobile

Managers can

- View outstanding tasks and filter them by employee journey or priority.
- View and complete their own Journeys.
- View important information about outstanding journeys and drill down on details.

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Note: Managers can create journeys, add mentors, and publish the journeys in the Employee Center on desktop only.

Mentors can

- View and complete their outstanding tasks.
- Receive notifications when they are assigned to an employee's journey.

Employees can

- View and complete tasks and training.
- Navigate through all of their tasks and milestones.
- Message their mentor or manager
- Search for help articles.
- Complete learning courses added by the organization or their manager.
- Receive notifications when a journey is created for them.

Journey designer dashboards and reports

Dashboards are configurable graphic displays of key metrics, reports, and other widgets on a single screen.

Journey designer reports

Report names, tables, and types

Report name	Table	Type
Team members on career growth journey	[sn_jny_journey]	Single Source
List of Active Journeys	[sn_jny_journey]	List
Total Journeys you have created	[sn_jny_journey]	Single Source
Total draft journeys	[sn_jny_journey]	Single Source
Team members on onboarding journey	[sn_jny_journey]	Single Source
Team members not on a journey in the last year	[sn_hr_core_profile]	Single Source
Total active journeys	[sn_jny_journey]	Single Source

Journey designer dashboards

Journey overview dashboard

Journey overview dashboard Graphically displays key usage information related to your journeys.

Executive journey view dashboard

Executive journey view dashboard Displays other metrics executives would be interested in.

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Create and manage Journey designer dashboards

Monitor journeys status and manage the Journey designer dashboards.

Before you begin

Role required: admin

About this task

The following dashboards are provided with the Journey designer app:

Journey overview dashboard

Displays information about the status of your active journeys, such as the number of journeys in draft mode, overdue journeys, journeys tasks, journeys by role and activity type.

Executive journey view dashboard

Displays the number of employees completing their journeys, SLA breaches, average days to complete journeys, and other metrics executives would be interested in.

You can modify many aspects of a dashboard.

- Add widgets
- Share based on users, groups, or roles
- Add and configure tabs

This task shows you how to add widgets to a dashboard and configure a tab layout.

Procedure

1. Navigate to **All** > **Journey Designer** > **Administration** > **Journeys Overview/Executive Journey view**.
2. Select **Edit**.
3. From the **Configuration** menu, edit the following as required.

Overview/Executive view fields and descriptions

Field	Description
Visualization type	Drop-down to select the data visualization of the report widget. Options available are: ○ Single score ○ Dial ○ Gauge ○ Area ○ Column ○ Line ○ Scatter ○ Spline ○ Step ○ Horizontal bar ○ Vertical bar

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Field	Description
	○ Donut ○ Pie ○ Semi donut ○ Pivot table ○ Heatmap ○ Bubble ○ Calendar report ○ Indicator scoreboard ○ List ○ Geomap **Note:** The sub-options in the following fields will depend on the selection in this drop-down. For example, if **Area** is selected in this drop-down, then the **Display settings** will have opens Y axis, X axis, etc., and if **Single Score** is selected, then the display settings will have sub-options respective to single score.
Header and border	Option to edit the appearance of the report widget.
Data	Data sources and metrics used to generate the report widget.
Presentation	Option to edit the display and color settings of the widget report.

Journey overview dashboard

Journey Overview is a comprehensive dashboard that allows you to efficiently track and manage ongoing tasks and journeys within the organization.

On the dashboard you can view details about different journeys, including the number of journeys that are due, journeys tasks, journey

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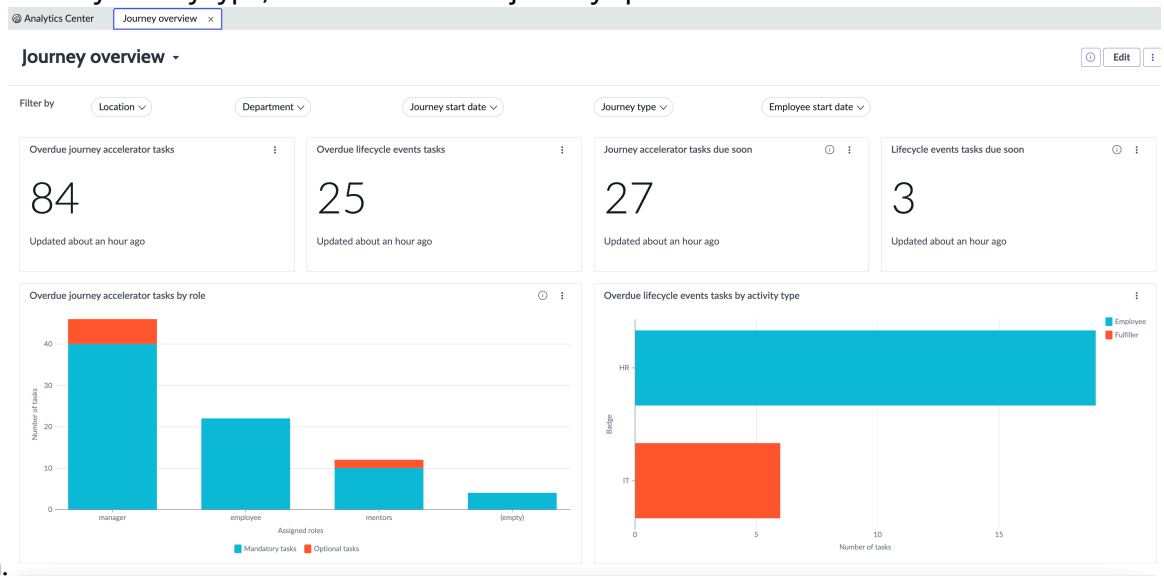
tasks by role and by activity type, and other relevant journey specific information.



Required ServiceNow AI Platform roles

The sn_jny.reader role is needed to access this dashboard.

Access the Journey overview dashboard

To open the dashboard, navigate to **All** > **Journey designer** > **Administration** > **Journey overview**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Users and dashboard details

User	Dashboard use
Journey/HR Coordinator	Access the journey overview dashboard to efficiently manage and analyze different journeys within the organization.

Reports

Report details

Title	Type	Source table	Description
Overdue journey accelerator tasks	Single score	Journey Accelerator Task [sn_ja_task]	Contains Journey Accelerator task details and relationships to other Journey Accelerator tables.

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Report details (continued)

Title	Type	Source table	Description
Overdue lifecycle events tasks	Single score	Task [task]	The Task table provides means for creating and completing Tasks, as well as tracking their workflow in your instance.
Journey accelerator tasks due soon	Single score	Journey Accelerator Task [sn_ja_task]	Contains Journey Accelerator task details and relationships to other Journey Accelerator tables.
Lifecycle events tasks due soon	Single score	Task [task]	Task table provides means for creating and completing Tasks, as well as tracking their workflow in your instance.
Overdue journey accelerator tasks by role	Bar	Journey Accelerator Task [sn_ja_task]	Contains Journey Accelerator task details and relationships to other Journey Accelerator tables.
Overdue lifecycle events tasks by activity type	Bar	Task [task]	Task table provides means for creating and completing tasks, as well as tracking their workflow in your instance.
Journey status	Line	Task [task]	Task table provides means for creating and completing tasks, as well as tracking their workflow in your instance.

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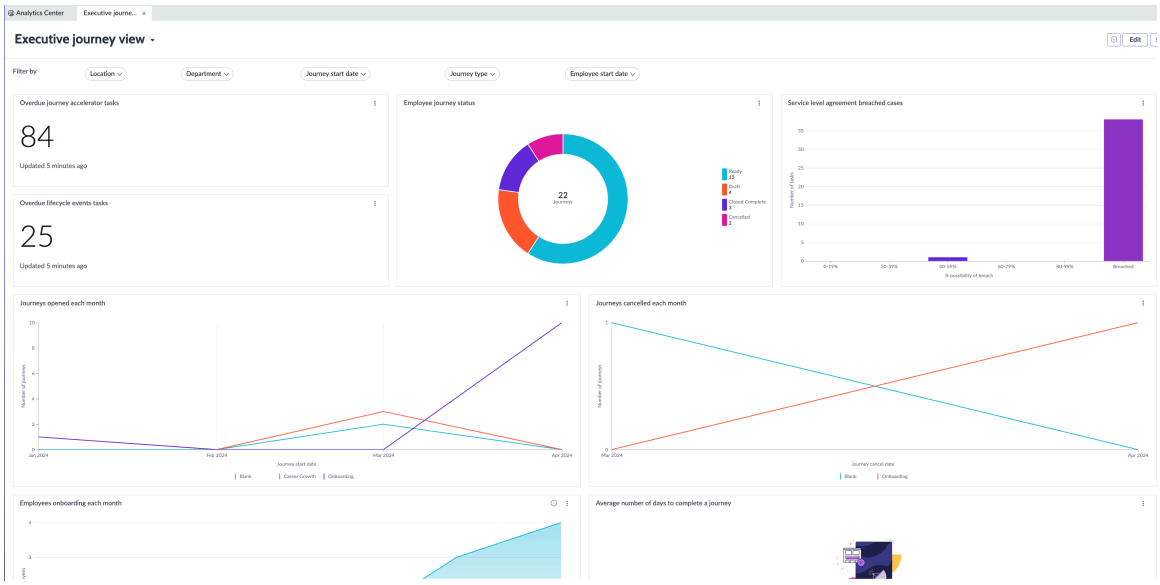
Filters

Filter details

Name	Type	Description
Location	Multi-select	Displays various tasks based on the location of the journey employee.
Department	Multi-select	Displays tasks based on the department the task assignee belongs to.
Journey start date	Choice	Displays tasks based on the journey start date.
Journey type	Multi-select	Displays tasks based on the journey type.
Employee start date	Choice	Displays tasks based on the start date of the employee.

Executive journey view dashboard

Executive-focused dashboard with reports containing information such as the number of employees completing their journeys, SLA breaches, average days to complete journeys, and other metrics executives would be interested in.



Required ServiceNow AI Platform roles

The sn_jny.reader role is needed to access this dashboard.

Access the Executive journey overview dashboard

To open the dashboard, navigate to **All** > **Journey designer** > **Administration** > **Executive journey view**.

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Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

User and dashboard details

User	Dashboard use
Leaders/Business executives/HR coordinators	Review and comprehend the significance of journey, quickly summarize them, and review task completion outcomes.

Reports

Report details

Title	Type	Source table	Description
Overdue journey accelerator tasks	Single score	Journey Accelerator Task [sn_ja_task]	Contains Journey Accelerator task details and relationships to other Journey Accelerator tables.
Overdue lifecycle events tasks	Single score	Task [task]	The Task table provides means for creating and completing Tasks, as well as tracking their workflow in your instance.
Employee journey status	Donut	Journey [sn_jny_journey]	Contains Journey Accelerator task details and relationships to other Journey Accelerator tables.
Service level agreement breached cases	Bar	Task SLA [task_sla]	Task table provides means for creating and completing Tasks, as well as tracking their workflow in your instance.
Journeys opened each month	Line	Journey [sn_jny_journey]	Contains Journey Accelerator task details and relationships to other

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Report details (continued)

Title	Type	Source table	Description
			Journey Accelerator tables.
Employees onboarding each month	Area 	Task [task]	Task table provides means for creating and completing Tasks, as well as tracking their workflow in your instance.
Average number of days to complete a journey	Bar 	Average no of days to complete a journey (indicator)	Provides the number of data it takes to complete a journey.

Filters

Filter details

Name	Type	Description
Location	Multi-select	Displays various tasks based on the location of the journey employee.
Department	Multi-select	Displays tasks based on the department the task assignee belongs to.
Journey start date	Choice	Displays tasks based on the journey start date.
Journey type	Multi-select	Displays tasks based on the journey type.
Employee start date	Choice	Displays tasks based on the start date of the employee.

Now Assist Virtual Agent topics for Journey designer

Complete the Journey designer related tasks from Employee Center using the Now Assist Virtual Agent topics.

To use the following Now Assist Virtual Agent topics in Employee Center, verify that the Journey designer and Now Assist for HRSD applications are installed from ServiceNow Store.

Create JA task

The Create JA task Virtual Agent topic enables you to create a JA task for any journey (if any JA plan is associated with that journey). This means that Journey Accelerator is one of the sources for that journey and the Create JA task Virtual Agent topic supports creation of JA task from the available templates only and not from scratch.

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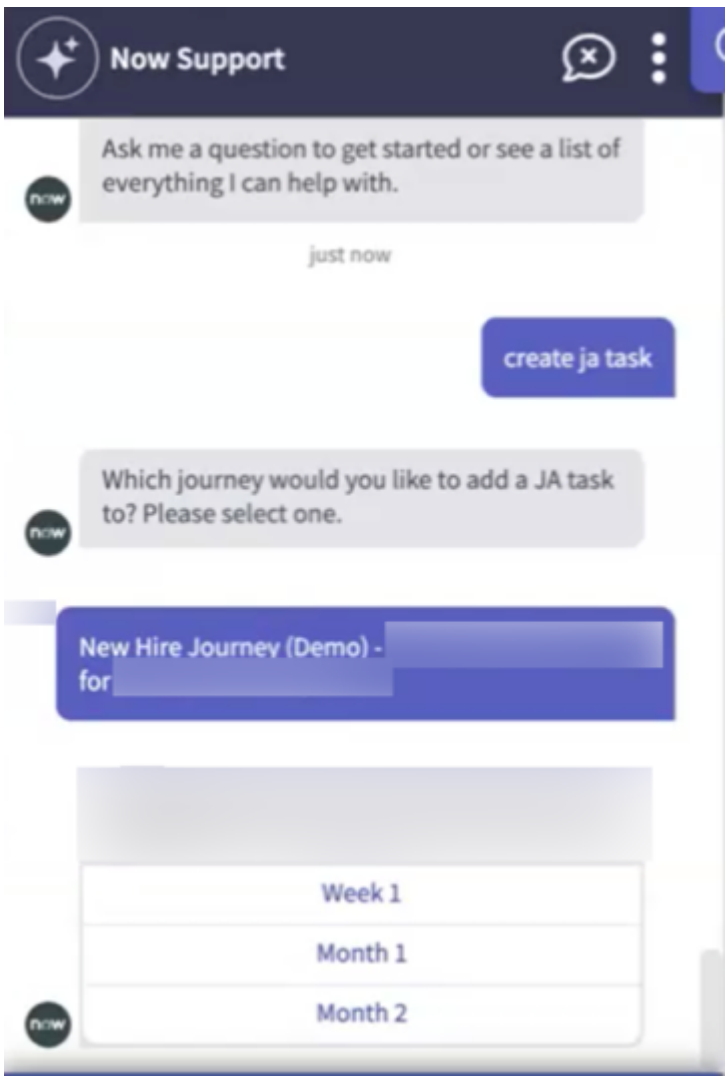
Note: The Create JA task Virtual Agent topic will be available only if the current logged in user has any journey(s) that have a JA plan associated. This means that Journey Accelerator is one of the sources for that journey and current logged in user should be a manager or a mentor for that journey with edit access.

From Employee Center, open a chat window and type in words such as, create JA task. After you have provided the required details (such as journey to which you want to add the JA task, stage at which you want to add the JA task, template for the JA task, due date for the task) the JA task is created. You can view the created task by navigating to the provided link in the topic flow.



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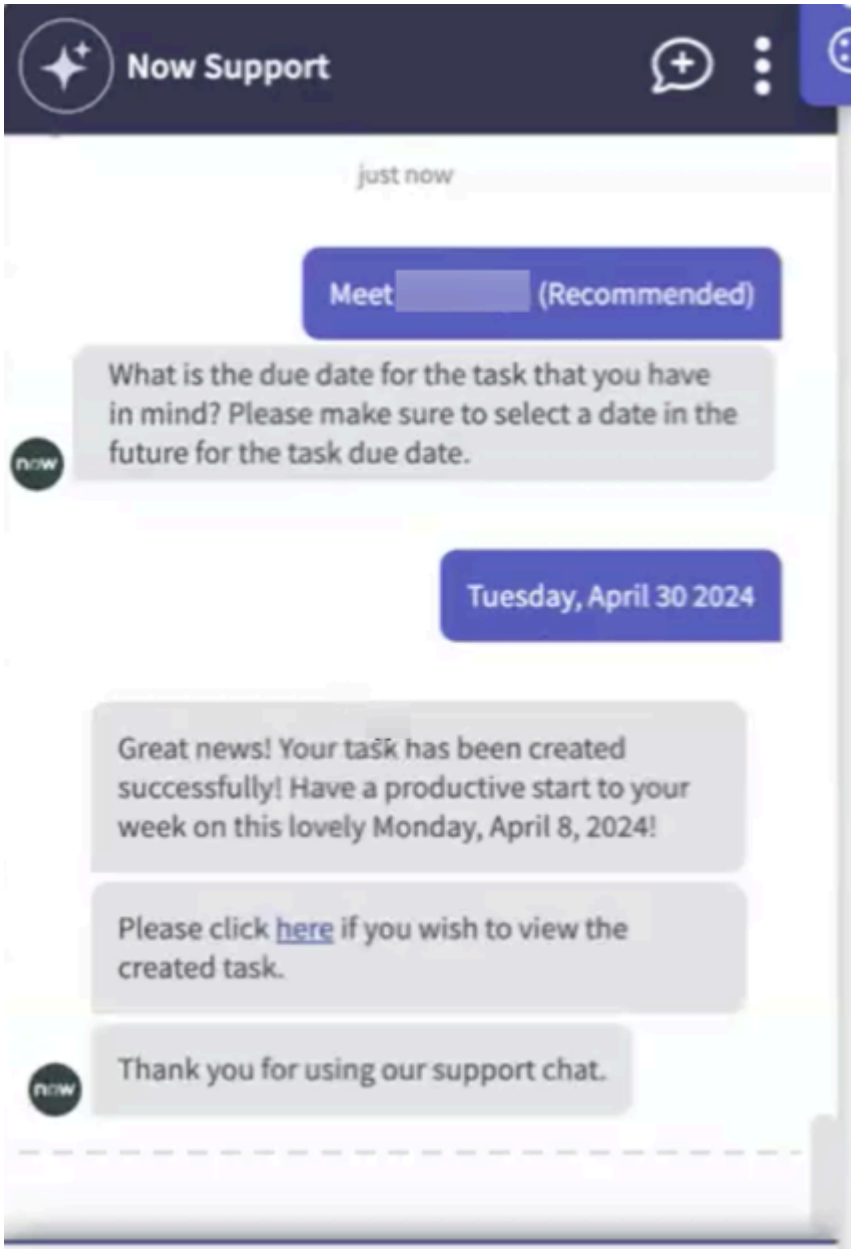

Agentic workflows for Journey designer

Use agentic workflows and Now Assist for HRSD to facilitate and manage employee journeys throughout the different stages of the employee's career. These workflows, powered by a single or team of AI agents, help your organization by automating procedures for managers while simultaneously curating custom experiences for employees.

Agentic workflows for Journey designer

Agentic workflow name	AI agents	Description
Generate onboarding ramp-up plan	AI agents used in this agentic workflow: • Journey information retrieval AI agent • Employee skill gap AI agent • Learning content AI agent	Provides an efficient process for helping managers generate personalized onboarding plans for new employees who are joining their organization. The workflow uses Journey designer to create a plan

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Agentic workflows for Journey designer (continued)

Agentic workflow name	AI agents	Description
	• Teammates learning content AI agent • Trending learning content AI agent • Ramp up plan generation AI agent • Ramp up plan reviewer AI agent	and tasks associated with the employee's onboarding journey. The manager uses Now Assist in Virtual Agent to review, revise, and publish the onboarding ramp-up plan that was curated by the AI agent.

Important: By default, all agentic workflows and AI agent records are read only.

To modify an agentic workflow, you must first duplicate the agentic workflow that you want to use, and then activate the following components during the guided setup:

- Activate the agentic workflow.
- Activate the agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically.

Important: When you modify an agentic workflow, AI agent, or tool, ensure that you update all instructions accordingly.

For more information about duplicating an agentic workflow and activating the required components, see the following topics:

- Duplicate an agentic workflow
- Activate an agentic workflow template
- Modify an AI agent

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Journey designer reference

Reference topics provide additional information about the lists and forms that you use to configure and use Journey designer..

Task template fields

To make a task template, fill in the task template fields.

Task template fields and descriptions

Field	Description
Name	Descriptive name for the activity that is associated with the task.
Table	Table that is used to track tasks and fields. Select the Task [sn_ja_task] table to enable access to the template fields.

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Task template fields and descriptions (continued)

Field	Description
Template	Template fields that appear only when a table is selected. Template fields are tracked in the Journey Accelerator Task [sn_ja_task] table. The following settings apply to the overall properties of the task: • **Mandatory**: Set to **true** to make the task required. Set to **false** to make the task optional. • **Editable**: Set to **true** to enable users to modify task fields. Set to **false** so that users can't modify certain fields in the task. **Note:** When `editable = false`, the following occurs: ○ The plan creator can't change the **To-do name**, **To-do description**, or **This to-do is optional** fields. ○ Users can't delete the to-do task from a plan. • **Type** ○ **Regular**: Standard to-do task template. ○ **Calendar**: Schedulable task. Creates to-do task linked to Microsoft Office 365 calendar event.
Active	Option that enables the task template when selected. Only active tasks are available for managers to use.
Task short description	Brief description of the task. This text appears to users from the Journey Accelerator plan. This field appears in the **Short description** field when you are managing tasks in stages.
Task description	Detailed description of the task.
Parent plan table	Higher-level table that associates an entry in the Journey Accelerator Task [sn_ja_task] with the table that tracks plans, Journey Accelerator Plan [sn_ja_plan]. Selecting the Journey Accelerator enables access to the plan-related fields.
Assign to source	User who is assigned the task: • Employee • Manager

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Task template fields and descriptions (continued)

Field	Description
	• Mentor **Note:** Initially, only the first mentor is assigned with to-do tasks in the list with multiple entries. Managers can reassign the to-do tasks to other mentors after the plan is created.
Relative due date trigger	Condition that is used to trigger when a task is assigned based on the publish date of the plan. This condition is evaluated with **Date offset type** and **Date offset type**. • **Created** • **End on** • **Start on** • **Updated** **Note:** Only use the **Start on** condition. **Start on** is selected by default.
Date offset type	Condition that is used to trigger when a task is assigned. This condition is evaluated with **Relative due date trigger** and **Number of offset days**. • **On** • **After** **Note:** The **After** condition is the default selection. We recommend that you use only the After condition.
Number of offset days	Condition that is used to trigger when a task is assigned. This condition is evaluated with **Relative due date trigger** and **Date offset type**. • **Days** • **Hours**

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Task template fields and descriptions (continued)

Field	Description
	Note: Only specify days, and keep hours set at 0 (zero). For example: If the `Relative Due Date Trigger = Start On`, `Date Offset type = After`, and `Number of offset days = 5 days`, the task is configured to trigger 5 days after the publish date of the plan.

Journey designer Journey Configuration fields reference

A journey configuration requires several fields to be completed or selected.

Journey Configuration page

Administrators configure journeys so that users have access to the features that are appropriate for their role. Each journey configuration is customizable to meet the needs within an organization.

Journey configuration fields

Field	Description
Journey configuration name	Provide a name for the Journey that helps managers identify the intended use case so they can customize the Journey with activity sets or stages.
Type	A Journey type is a category used to identify the intention of the journey, such as onboarding, leave of absence, or career growth. **Note:** This value is used for reporting and categorization. If using Journey Accelerator, keeping the **Plan type** and the **Journey type** consistent is helpful.
Journey source	• **Lifecycle Events**: Use Lifecycle Events to facilitate cross-department tasks, such as approvals. • **Journey Accelerator**: Use Journey Accelerator modules to create templates for different audiences, such as a department-specific onboarding process. • **Lifecycle Events and Journey Accelerator**: The Journey will contain both a Lifecycle Event and Journey Accelerator plan.

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Journey configuration fields (continued)

Field	Description
Lifecycle event type	Select a lifecycle event for the Journey configuration. Lifecycle Events are created and managed from the **Manage Lifecycle Event** form. Go to **All** > **Lifecycle Events** > **Manage Lifecycle Event** to add or manage lifecycle events. See, Lifecycle Events.
Journey accelerator plan type	Journey Accelerator plan types are configured by an administrator. Plan types include plans for transitions such as onboarding, offboarding, or promotions.
Active	Indicates whether the Journey configuration is available (active) for use in Journey designer.
Update on manager change	Option to enable a change in manager. Selecting this option will update the journey configuration and make it eligible for a manager change. The following fields of tasks are updated on reassignment: • HR Case: Subject person, Opened for • HR Task: Assigned to • Incident: Caller • JA Task: Assigned to • Approvals: Assigned to • Requests: Requested for **Note:** For this functionality to work, ensure that you copy the flow **Manager Change - Journeys** and activate it. To activate a flow, see Activate a flow. Also note that email notifications are sent to the old manager, new manager, assigned agent, and the user updating the manager in `sys_user`.
Journey mobile image	The image that appears at the top of the Journey when viewed in the mobile app. See, Journeys on Now Mobile.
Can be used as a template	Indicates whether the Journey configuration can be triggered from the **Create journey** widget.

Journey title details tab

Titles help journey owners identify which journey is the best for their needs.

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Journey title details fields

Field	Description
Use custom title	Selecting **Use custom title** so that you can create a unique title for a Journey.
Title	The name of the journey configuration that is visible to other users such as, journey owners, employees, and mentors.
Description	The description of a journey is visible to the journey owner. Descriptions help journey owners select which journey configuration is appropriate for their needs.
Title icon	Administrators can add icons to journey headers.

Journey owner permissions tab

Owner permissions control which features are available for the owner of a journey to use. Some permissions are directly related to which features are available in your implementation of Journey designer.

Journey owner permissions fields

Field	Description
Can add mentors	Enables journey owners to add mentors to a journey. Mentors can have tasks assigned to them.
Can edit journey	Enables journey owners to edit and add Journey Accelerator tasks and stages in a journey. **Note:** Journey owners and mentors can't modify stages, cases, or tasks coming from the **Lifecycle Event**.
Can view satisfaction score	Enables journey owners to see the pulse survey results tied to this journey. **Note:** This feature requires integration with Listening Posts. See, .
Can add recommended learning	Enables journey owners to add courses that are related to training or learning. This permission depends on your organization's implantation of Journey designer app and features. **Note:** This feature requires integration with Learning Posts. See, .

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Journey owner permissions fields (continued)

Field	Description
Can add quick links	Enables journey owners to add quick links to a journey. The quick links module in the Employee Center enables access to internal and external resources, such as knowledge bases, catalog items, pages, and links.
Can add personalized message	Enables journey owners and mentors to send personalized messages to employees. When enabled, you can also select an email template to include for the journey configuration. The selected email template is available for the journey owner or mentor to send or modify before sending. When this permission is enabled, the **Send a note** button is visible in the published journey.

Mentor permissions tab

Mentor permissions determine how much control that a mentor has in the journey process. A mentor is a person who helps employees complete journeys.

Mentor permissions fields

Field	Description
Can add other mentors	Enables mentors to add other mentors to a journey. An extra mentor could have unique skills that would be helpful for an employee. Mentors can have tasks assigned to them.
Can edit journey	Enables mentors to edit everything in a journey.

Journey designer Model task fields

Managers create to-do tasks that are saved as templates. The templates are stored as a Journey designer Model Task.

Model task fields and descriptions

Field	Description
Task name	The name of the to-do as it appears in an action plan.
Owner	The manager that created the to-do task template.
Additional assignee list	Adds user to the **Additional people** field of the to-do task.

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Model task fields and descriptions (continued)

Field	Description
Assigned to type	• Persona: One of the personas supported for action plans. (manager, employee, mentor) • User: A single user. **Note:** The availability of other fields depends on your selection. The persona is listed in the **Assigned to source** field.
Parent plan table	The table that contains the to-do task template information (Journey Accelerator Plan [sn_ja_plan]).
Assigned to source	The persona to which the to-do task is assigned.
Assigned to	The name of a single user.
Active	Select to make the task available. Clear the check mark to hide the template from users.
Mandatory	Select to make the to-do task mandatory. Clear the check mark to make the task optional.
Journey Accelerator task type	• Regular: Task without the scheduling feature. • Calendar: Available when Journey Accelerator is configured to work with a calendar such as Microsoft Exchange Online • Learning: Delivers an online course. This option is only available when Learning Posts is installed. • Pulse surveys: Delivers a survey to collect feedback. This option is only available when Listening Posts is installed.
Due date configuration	A conditional due date for the task.
Number of days/weeks	The days or weeks from the assigned condition for when the task is due.
Task description	The description of the task that is visible to the users.

Journey designer version 2 plan configuration fields

These fields are for Journey designer version 2 plan configurations.

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Plan configuration fields and descriptions

Field	Description
Title	The title of the plan configuration that is visible in the Employee Center.
Audience	Used to restrict content access by an audience. See, Restrictions for Content Publishing and Content Experience
Visible to all owners	When selected, the plan configuration is visible to all users that own any plan configuration. **Note:** Only owners are able to change or add to the plan configuration.
Short description	A short one line description of the plan configuration, for example "Onboarding journey template for sales employees."
Description	A long description of the plan configuration that owners read to get more details about the configuration.
Active	A published plan configuration is active. If **Active** is selected, it's available to be used.
Journey Accelerator plan type	A Journey designer plan configuration must be associated with a Journey Accelerator Plan Type.
State	• **Awaiting approval**: The plan configuration has been published by the owner, and it must be reviewed and approved by the assigned **Approvers**. • **Draft**: The plan configuration is under development and it must be approved to be published and move to the **Ready** state. • **Ready**: A published plan configuration is in the ready state.

Journey designer header configuration fields reference

Journey designer headers can be configured for different journeys so that the different users can have a unique view for their role in the journey.

Heading Configuration

Note: The **Heading Configuration** must be created before heading fields can be added.

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Heading configuration fields for Journey designer

Field	Description
Configuration name	The name of the header configuration.
Persona	Journeys have 3 personas. Each persona has its own header configuration. • **Employee**: The person for whom the journey is created. • **Journey owner**: The person who creates the journey. Managers create and modify journeys for their employees. • **Mentor**: The person identified to help the employee complete a journey. A mentor's permission may include the ability to add other mentors and edit a journey.

Heading Configuration Fields

Heading fields have default labels for the name of each field. Labels are displayed to users in the journey. Add custom labels to make user visible labels meaningful to the user.

For example:

Label examples

Custom label	Table name	Field name
Journey publish date	Journey Accelerator Plan [sn_ja_plan]	*start_on*
Mentor	Journey [sn_jny_journey]	*mentors*

Heading Configuration fields

Field	Description
Custom label	A custom label is visible to the users who are part of the journey.
Display order	A label's display order is used in the user interface to identify how the label is displayed.
Field name	The default name of a field that is given to the label identified in a table.
Table name	The name of the table that contains the field names and custom labels used in the user interface. The header fields for journeys are in these tables. • Journey Accelerator Plan Header Field [sn_ja_plan] • Journey [sn_jny_journey]

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Heading Configuration fields (continued)

Field	Description
	A journey header configuration can have labels identifies in multiple tables.

Journey designer user permissions reference

Administrators can configure the user permissions for different Journey designer journey configurations.

Journey owner and mentor permissions

Some permissions are only available when other applications are integrated with Journey designer.

Owner and mentor permissions details

Field	Description
Can add mentors	Allows a user to add mentors to a journey. Adding mentors is helpful if an employee needs guidance from a user with a special skill set.
Can edit journey	Allows a user to modify a journey. Managers can enable mentors to modify an employee's journey.
Can view satisfaction score **Note:** Available for only journey owners, and only available if the Listening Posts app is installed.	Allows a journey owner to view statistical data related to an organizations journey.
Can add recommended learning	When the Learning Posts app is installed and configured, journey owners and mentors can add recommended learning to an employee's journey.
Can add quick links	Allows the user to add quick links to a journey. Quick links can link to different content types. There are two types of quick links. • Administrator can add quick links to a journey configuration. • Journey owners and mentors can add URL links to individual journeys.
Can add personalized message	Enables journey owners and mentors to include personalized messages from a journey to employees. Permission can be set for either journey owners or mentors.

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Owner and mentor permissions details (continued)

Field	Description
	Note: The **Send a note** button is visible in only published journeys.

Related topics

Quick Link form

Create a quick link

Journey designer journey template reference

The journey template page has information that is useful to the plan configuration owner.

Header area

The header of this page displays the plan configuration name and description and the following information.

A ServiceNow administrator assigns owners, co-owners, and approvers.

Owner

There can be only one primary owner of a journey template.

Co-owners

There can be multiple co-owners for a journey template. Co-owners have the same abilities of the owner to change and publish plan configurations.

Approvers

Approvers review and approve or reject changes to a journey template. Changes to a journey template need only one approval.

Tip: Owners can add comments that are displayed in the **Activity** tab of a plan configuration.

1. From **My tasks**, open an **Approval request**.
2. Select the link at the top of the request.
3. In the plan configuration, select the **Activity** tab.
4. Read the comments added by the owner to see if there are any special instructions.

Preview

Preview a template to make sure the changes you made are what you expected.

- **Preview this template**: Preview the template with the roles that are assigned to the owner.
- **Preview as an employee**: Preview the template with the roles assigned to the selected user.

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Note: The plan configuration preview feature depends on whether the plan configuration owner has access to the selected **Audience type**. These **Audience types** are accessible to all plan configuration owners.

- HR Profile
- HR Criteria
- Users
- Users Criteria
- Upload file

Publish journey template

The changes are visible after an approval by one approver. The template can't be edited until after an approver either approves or rejects the approval request.

Note: Comments are visible as comments in the **Activity** tab.

Cancel approval request

The owner or any of the co-owners can cancel the approval request.

Journey template overview tab

The overview tab shows all the components of a journey that can be modified by owners.

Stages

A logical container of a journey that includes tasks that are assigned to employees, mentors, or managers.

Task templates

Individual tasks assigned to a user.

Activity tab

Displays the history of all the changes for a plan configuration in chronological order.

Email notifications

Owners, co-owners, and approvers can be the recipient of email notifications.

Note: Users with **Notification** set to **Disable** won't receive any notifications.

Email notifications details

Email notifications are sent when	Email notification recipients are
An owner or co-owner is assigned to a plan configuration	• Owner • Co-owner
An owner publishes a journey template for approval	Approver
An approver rejects a journey template approval request	• Owner • Co-owner

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Email notifications details (continued)

Email notifications are sent when	Email notification recipients are
An owner cancels or rescinds a journey template approval request	Approver
A journey template approval request is approved	• Owner • Co-owner
It has been more than 3 days since a journey template was submitted for approval by the owner **Note:** Notifications are sent on the third day and every other day (that is, 5th, 7th, 9th days) until a response is received.	Approver

Components installed with Journey designer

Several types of components install with the activation of the Journey designer application, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for the Journey designer application. If you want to install the demo data, click **Load demo data** when installing this application. Demo data includes sample records and configurations for common use cases.

There are also dependencies on other features or apps.

Roles

Roles in Journey designer

Role title [name]	Description	Inherits	Inherited by
Administrator [sn_jny.admin]	Grants access to create and manage all Journey designer and Journey Accelerator configurations and features.	• [sn_ja.admin] • [sn_jny.writer] • [taxonomy_admin] • [sn_hr_le.admin] • [user_criteria_admin]	sn_hr_core.admin
Modifier [sn_jny.writer]	Grants access to create and modify Journey components, such as plans, stages, and to-dos.	• [sn_jny.reader] • [sn_ja.modifier]	[sn_jny.admin]

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Roles in Journey designer (continued)

Role title [name]	Description	Inherits	Inherited by
Reader [sn_jny.reader]	Grants access to view journeys and complete tasks assigned to them.	[sn_ja.reader]	sn_hr_core.case_reader

You can assign these roles to the appropriate roles, groups, or users in your application.

- To assign a role to another role, see Add a role to an existing role.
- To assign a role to a group, see Assign a role to a group.
- To assign a role to a user, see Assign a role to a user.

Modules with Role

Modules with role in Journey designer

Module	Table	Role
Journeys Guided Setup	Journey Configuration [sn_jny_journey_config]	sn_jny.admin
Manage Journey Configurations	Journey Configuration [sn_jny_journey_config]	sn_jny.admin
Manage Journey Types	Journey Type [sn_jny_journey_type]	sn_jny.admin
Manage Heading Configurations	Heading Configuration [sn_jny_journey_heading_config]	sn_jny.admin
Manager Journey Type Links	Journey Type Quick Link [sn_jny_m2m_journey_type_quick_link]	sn_jny.admin
Manage Roles	User Role [sys_user_has_role]	sn_jny.admin
Journeys	Journey [sn_jny_journey]	sn_jny.reader
Active Journeys Dashboards	(no table)	sn_jny.reader
Journey Usage Dashboard	(no table)	sn_jny.reader
Reports	Reports [sys_report]	sn_jny.reader

Tables

Tables installed with Journey designer

Table name [name]	Description
Available For [sn_jny_m2m_journey_config_user_criteria]	Contains and tracks users that meet the criteria to access recommended learning courses.
Field Mapping	Map fields, custom text, or custom scripts to fields used in a journey. These field mappings

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Tables installed with Journey designer (continued)

Table name [name]	Description
[sn_jny_journey_field_mapping]	are from HR tables and fields to Journey designer or Journey Accelerator tables and fields.
Heading Configuration [sn_jny_journey_heading_config]	Contains details about Journey designer header configurations.
Heading Field [sn_jny_journey_heading_field_config]	Contains details about Journey designer heading fields and tracks changes related to field labels.
Journey [sn_jny_journey]	Contains and manages Journey designer plans and journeys relation to other tables.
Journey Audit [sn_jny_journey]	Tracks CRUD actions on plan configurations and who made them.
Journey bulk request task [sn_jny_bulk_request]	Tracks information about bulk updates. Admins can use this table to understand and troubleshoot bulk updates if there are errors or failures.
Journey Configuration [sn_jny_journey_config]	Contains details about Journey designer plan and journey configurations.
Journey Configuration Quick Link [sn_jny_m2m_journey_config_quick_link]	Manages the relationship of quick links that are added to plans and journeys.
Journey Mobile Carousel [sn_jny_st_jny_mobile_carousel]	Manages data that is presented in the carousel on the Now Mobile App.
Journey Progress [sn_jny_journey_progress]	Manages data related to tracking how a journey is progressing against milestones for tasks completion.
Journey Quick Link [sn_jny_journey_quick_link]	Contains details about quick links in Journey designer.
Journey Quick Links [sn_jny_st_journey_quick_links]	Manages the data for quick links in journeys.
Journey Tasks [sn_jny_st_journey_task]	Tracks activity for task templates in journey configurations.
Journey Timeline [sn_jny_st_journey_timeline]	Tracks the timeline data for a journey.
Journey Type [sn_jny_journey_type]	Tracks the details about the journeys contained in Journey designer
Journey Type Quick Link [sn_jny_m2m_journey_type_quick_link]	Manages quick link data related to a journey configuration.

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Tables installed with Journey designer (continued)

Table name [name]	Description
Mobile Journey [sn_jny_st_journey]	Tracks journey data activity from the Now Mobile app.
Mobile Journey Overview [sn_jny_st_mobile_journey_overview]	Tracks data used in the Now Mobile app for user journeys.
Not Available For [sn_jny_m2m_journey_config_user_criteria_no]	List users that met the criteria not to be added to a recommended course.

Journey Accelerator

Administrators can use the ServiceNow® Journey Accelerator application to create templates for plans and to-do tasks. Managers then use the templates to create and publish customized plans for key employee transitions. Managers, employees, and mentors can access the plans from the Employee Center (EC).

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Explore  Learn how employees, managers, and mentors use Journey Accelerator.	Configure  Plan and configure your implementation.	Integrate  Extend Journey Accelerator capabilities by integrating with other applications.
Use  Work with journeys.	Analytics and Reporting Solutions  Improve process and track the progress of different journeys.	Reference  Get details about components like roles, fields, tables, and properties.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Journey Accelerator

Learning about how to use Journey Accelerator application to create templates for plans and to-do tasks. How Managers can use the templates to create and publish customized plans for key employee transitions. Managers, employees, and mentors can access the plans from the Employee Center

Journey Accelerator overview

Using the Journey Accelerator application on the ServiceNow AI Platform, administrators create templates that enable managers to develop transition plans for employees. Administrators build templates for transition plans, such as promotions, offboarding, onboarding, and role changes for employees.

Journey Accelerator users

Users

User	Description
Administrators	• Define and manage plan types for employee transitions, such as promotions, onboarding, offboarding, and more. • Create and manage plan configurations for specific employee audiences, such as sales associates or IT technicians. • Create and manage task templates, such as workstation setup or planning and training sessions. • Track plan progress and template usage from the Journey Accelerator dashboard.
Managers	• Create and manage customized plans for employee transitions. **Note:** Only managers can create plans. • Add to-do tasks by using a library of existing tasks. • Create tasks that are unique to an employee transition.

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Users (continued)

User	Description
	• Publish plans that are based on employee transition dates, such as start dates. • Assign mentors to employees.

Mentor	• With the Can view permission, mentors can:
	  ○ View all to-do tasks in a plan
	  ○ Update tasks that are assigned to them
	• With the Can edit permission, mentors can:
	  ○ Edit, add, or delete stages and to-do tasks
	  ○ Publish plans
	  ○ Set plan publish dates

Employees	• View the plans, complete their to-do tasks, and track their progress. **Note:** All users can do the following actions: • Add comments: Send comments or questions to the plan's owner. • Add attachments: Add relevant files that support the completion of a to-do item such as certificates and emails.

Journey Accelerator benefits

Journey Accelerator benefits

Benefit	Feature	Users

What to explore next

To learn more about configuring and using , see:

-
-
-

Journey Accelerator versions and release compatibility

Available features depend on the Journey Accelerator version, family release, and application-specific features.

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Not all Journey Accelerator features are available in all supported family releases. Go to the ServiceNow Store to view the latest information and requirements for features and releases.

Note: Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Different versions of Journey Accelerator are supported only in certain family releases.

Journey Accelerator Version 5.0.4

Supported family releases: Tokyo.

Note: Journey Accelerator Version 5.0.0 cannot be installed as a standalone application. Journey Accelerator version 5 functionality is installed as a dependency with Journey designer version 1. This information is for reference only.

Other requirements: To schedule Outlook meetings from Journey Accelerator tasked-based to-dos, the following spoke should be installed:

- Microsoft Exchange Online Spoke v3.2.0 [sn_ex_online_spke]
- Retry Handler Framework v1.0.1 [sn_retry_handler]

Journey Accelerator Version 4.0.2

Supported family releases:

Note: Journey Accelerator Version 4.0.2 is the last family release that a standalone version of the app can be installed. The latest Journey Accelerator functionality is included with the Journey designer application.

- Utah
- Tokyo
- San Diego

System requirements:

- HR Service Delivery Enterprise package
- Employee Center [sn_ex_sp]
- Content Publishing [sn_cd]
- The following update sets must be loaded after installing Journey Accelerator. Links to the update sets are in the Supporting Links and Documentation section of the ServiceNow Store:
  - JA_ESC_header_menu_item-Journey Accelerator_Plans.xml
  - JA_Enforce_security_property.xml
  - JA_Allow_Content_Delivery.xml

Other requirements:

- To schedule Outlook meetings from Journey Accelerator tasked-based to-dos, the following spoke should be installed:
  - Microsoft Exchange Online Spoke v3.2.0 [sn_ex_online_spke]
  - Retry Handler Framework v1.0.1 [sn_retry_handler]

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- To use the Listening Posts [sn_lp] application, you must install Listening Posts v4.0.2 from the ServiceNow Store (and all Listening Posts requirements)
- To use the Learning Posts [sn_lnp] application, you must install Learning Posts v4.0.2 from the ServiceNow Store (and all Learning Posts requirements) as well as the following update set: JA_HR_Learning_Core.xml

Key features and requirements summary for the latest version of Journey Accelerator in ServiceNow Store

Journey Accelerator Version 3.0.3

Supported family releases

- Rome
- Quebec
- Paris

System Requirements:

- HR Service Delivery Enterprise package
- Employee Service Center [com.sn_hr_service_portal]
- Content Delivery [com.sn_content_delivery]
- The following update must be loaded after installing Journey Accelerator. Links to the update sets are in the Supporting Links and Documentation section of the ServiceNow Store:
  - JA_ESC_header_menu_item-Journey Accelerator_Plans.xml
  - JA_Enforce_security_property.xml
  - JA_Allow_Content_Delivery.xml
- The following update sets are only applicable if on Rome and will no longer be necessary after San Diego
  - JA_HR_Lifecycle_Events_Rome_touchpoints.xml
  - JA_HR_Core_Rome_touchpoints.xml

Other Requirements:

To schedule Outlook meetings from Journey Accelerator tasked-based to-dos, the following spokes should be installed:

- Microsoft Exchange Online Spoke v2.0.3 [sn_ex_online_spke]
- Retry Handler Framework

Key features and requirements summary for Journey Accelerator Version 3.0.3 in ServiceNow Store

Journey Accelerator Version 2.0.2

Supported releases:

- Rome
- Quebec
- Paris

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System Requirements:

- HR Service Delivery Enterprise package
- Employee Service Center [com.sn_hr_service_portal]
- Content Delivery [com.sn_content_delivery]
- The following update sets must be loaded after installing Journey Accelerator. Links to the update sets are in the Supporting Links and Documentation section of the ServiceNow Store:
  - JA_ESC_header_menu_item-Journey Accelerator_Plans.xml
  - JA_Enforce_security_property.xml
  - JA_Allow_Content_Delivery.xml

Other Requirements:

To schedule Outlook meetings from Journey Accelerator tasked-based to-dos, the following spokes should be installed:

- Microsoft AD Spoke [com.sn.ad.spoke]
- Microsoft Azure AD spoke [com.sn.azure_ad.spoke]
- Microsoft Exchange Online Spoke v2.0 [sn_ex_online_spke]

Key features and requirements summary for Journey Accelerator Version 2.0.2 in ServiceNow Store

Journey Accelerator Version 2.0.1

Supported releases:

- Quebec
- Paris

System Requirements:

- HR Service Delivery Enterprise package
- Employee Service Center [com.sn_hr_service_portal]
- Content Delivery [com.sn_content_delivery]
- The following update sets must be loaded after installing Journey Accelerator. Links to the update sets are in the Supporting Links and Documentation section of the ServiceNow Store:
  - JA_ESC_header_menu_item-Journey Accelerator_Plans.xml
  - JA_Enforce_security_property.xml
  - JA_Allow_Content_Delivery.xml

Other Requirements:

To schedule Outlook meetings from Journey Accelerator tasked-based to-dos, the following spokes should be installed:

- Microsoft AD Spoke [com.sn.ad.spoke]
- Microsoft Azure AD spoke [com.sn.azure_ad.spoke]
- Microsoft Exchange Online Spoke v2.0 [sn_ex_online_spke]

Key features and requirements summary for Journey Accelerator Version 2.0.1 ServiceNow Store

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Journey Accelerator Version 1.0.2

Supported releases:

- Quebec
- Paris

System Requirements:

- HR Service Delivery Enterprise package
- Employee Service Center [com.sn_hr_service_portal]
- The following update sets must be loaded after installing Journey Accelerator. Links to the update sets are in the Supporting Links and Documentation section of the ServiceNow Store:
  - JA_ESC_header_menu_item-Journey Accelerator_Plans.xml
  - JA_Enforce_security_property.xml
  - JA_Allow_Content_Delivery.xml

Key features and requirements summary for Journey Accelerator Version 1.0.2 in ServiceNow Store

Install and configure Journey Accelerator

Install the Journey Accelerator [sn_ja] application to enable your users to easily create and manage transition plans.

Before you begin

The Employee Center must be installed and activated. Managers, employees, and mentors access Journey Accelerator plans from the EC.

- Learn about the Employee Center (EC) portal [com.sn_hr_service_portal] at Employee Center.
- If you are planning to use the Journey Accelerator v2 scheduling feature, see Microsoft Exchange Online setup for Journey Accelerator before you begin installation.
- Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Related topics

Verify the Journey Accelerator installation

Verify the Journey Accelerator installation

Verify the installation and updates are correctly applied for the Journey Accelerator application by using demo data.

Before you begin

Note: This task can be completed only if the Journey Accelerator application demo data has been installed.

Role required: admin

Procedure

1. Navigate to **All** > **System Administrator** > **Impersonate User**.
2. In the search field, enter the user name `Darcie Schmidt` and press **Enter**.
3. Navigate to **Self-Service** > **Employee Center**.
4. To view and create plans, click **My action Plans**.

Result

When you see the **My Action Plans** page, you have correctly installed and updated the Journey Accelerator application.

Modify a scheduled job for Publish Journey Accelerator plans

Update the Publish Journey Accelerator plans job. The job evaluates a plan's publish date to determine when to publish the plan.

Before you begin

Role required: admin

About this task

You can change the scheduled frequency at which the job runs, modify scripts, and add conditions.

Note: The default scheduled frequency for a Publish Journey Accelerator plan is 12 hours.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. In the **Name** field, enter `Publish Journey Accelerator plans`, press **Enter**, and then open the job.
3. On the form, fill in the fields.

Schedule script execution form

Field	Description
Name	Name that identifies this scheduled job.

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Field	Description
Active	Option that indicates that scheduled job is active and should be executed at the specified date and time.
Application	Name of the application that contains the script. **Global** appears if the script is in the global scope.
Conditional	Option for enabling the running of the scheduled job if certain conditions are met in the associated script.
Run	Time interval to use for running the scheduled job: ○ **Daily**: Runs daily, at a designated time. ○ **Day and Month in Year**: Runs yearly on a specific day and month (for example, July 14), at a designated time. ○ **Day in Week in Month in Year**: Runs yearly on a specific day of the week in a specific week of a specific month (for example, the second Monday in October), at a designated time. ○ **Week in Month**: Runs monthly during a specific week of the month (for example, the third week of each month), on designated days and at a designated time. ○ **Weekly**: Runs on a weekly basis, at a designated time and day of the week. ○ **Monthly**: Runs on a monthly basis, at a designated time and day of the month. ○ **Periodically**: Runs on a designated repeating interval. ○ **Once**: Runs for a single occurrence only. ○ **On Demand**: Runs immediately on demand. ○ **Business Calendar: Entry Start**: Runs on the starting entry dates for the business calendar that you select in the **Business Calendar** field. A scheduled job runs for the starting date of each of the business entries that you defined for the business calendar. For example, if the business calendar represents a fiscal year, and the starting date of each entry is a fiscal month, the scheduled job runs on the first day of each month. ○ **Business Calendar: Entry End**: Runs for the ending date for the business calendar that you select in the **Business Calendar** field. This selection runs in the same manner as **Business Calendar: Entry Start**, but for the end dates of the associated business calendar entries. **Note:** When you select **Business Calendar: Entry Start** or **Business Calendar: Entry End**, you can apply an offset factor to schedule the job to run before or after the time span of the selected business calendar. If you select a business calendar and all its business calendar spans are in the past, the job would never run since that is an invalid configuration. To learn more, see the **Offset type** and **Offset** fields. To learn more about creating and using business calendars and defining business calendar entries, see Creating business calendars and Define business calendar entries.

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Field	Description
Repeat Interval	Duration of the repeat interval for each scheduled job execution. Enter the duration in the number of days, hours, or minutes. For example: ○ To run the scheduled job every four days, enter `04` in the **Days** field. ○ To run it every 26 hours, enter `26` in the **Hours** field. ○ If it should repeat at an interval of 13:30:25, enter `13` in the **Hours** field, and then enter 30 and 25 in the two unlabeled fields after it.
Starting	Allows you to define the beginning window of time when you would like your job to start running. The job will actually run at the time specified in **Run time**. Select the calendar date and time. The **Starting** field appears only if you select one of the following **Run** types in the **Run** field:
Condition	A conditional script that determines if a scheduled job should run. The last expression of the script should evaluate to a Boolean (true/false) value. This text box appears only if you select **Use conditions**.
Run this script	Name of the script to run at the scheduled date and time. Two examples are copy script logic from a business rule or call a script include.

4. Click **Update**.
   To learn more about scheduled jobs, see Scheduled jobs.

Configure action plan access in the Employee Center

Add or change the header menu labels. Or, update the My active items list link used to access action plans in the Employee Center user interface.

Configure Journey Accelerator menu items in the Employee Center

Install the latest Employee Center app from the ServiceNow Store. After you install the EC app, you can modify the labels for header menus or My active items links.

1. Install Employee Center

   Install the Employee Center app to get the latest EC user interface.

2. Update the Employee Center theme

   Update the Employee Center service portal settings to use the latest theme and menus.

3. ○ Add a Journey Accelerator action plan link to My Active Items list
   ○ Add a Journey Accelerator action plan menu to the Employee Center

Update the Employee Center theme

Install the Employee Center app from the ServiceNow Store to update the EC UI theme.

Before you begin

Install the Employee Center app from the ServiceNow Store before you can update the labels for the menu items or My active items links. For more information, see Install a ServiceNow Store application.

For more information on Employee Center themes, see Customize Employee Center portal theme.

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Role required: admin

About this task

Update the Employee Center service portal setting to use the latest Employee Center user interface.

Note: The Employee Center in your instance might already use the updated field settings.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**, and click **Employee Center**.
2. Open the record for **Employee Center Menu**.
   Set these fields and values:

Employee Center fields and values

Field	Value
Homepage	`ec_dashboard`
Theme	`EC Theme`
Main menu	Employee Center Menu

3. Click **Update**.

What to do next

You can update Employee Center menu items and links in My Active Items.

- Add a Journey Accelerator action plan link to My Active Items list
- Add a Journey Accelerator action plan menu to the Employee Center

Add a Journey Accelerator action plan link to My Active Items list

Add a menu item for Journey Accelerator action plans to the header menus in the Employee Center.

Before you begin

The latest Employee Center app installed on your instance. See, Install Employee Center.

Role required: admin

Procedure

1. Navigate to **All** > **Employee Center** > **Activity Configuration** and click **New**.
2. Fill in these fields.
   - **Activity Name**: `Action plan items`
   - **Activity portal page**: `ja_plans`

   Leave the default settings for the other fields.
   - **Activity navigation**: Internal
   - **Order**: 100
3. Click **Submit**

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What to do next

Go to **Employee Center** > **Activity Configuration**, and create an Employee Center activity configuration for the activity you created. See, Create an Employee Center activity configuration.

Create an Employee Center activity configuration

Create or modify an activity configuration to define how the Employee Center handles application links in My active items.

Before you begin

Use the application picker to set the appropriate scope. Employee Center. See, Application picker

The name of the activity to configure. Use the name of the activity created in the Add a Journey Accelerator action plan link to My Active Items list task example `Action plan items`.

Role required: admin

About this task

Activity configurations enable administrators to control the actions of links associated with applications and features. For more information about activity configuration:

- Activity Configuration form
- Activity Configuration Detail form

The scope of an activity configuration is associated with an application. Availability of fields in an activity form depends on the selected application. This task starts in the Employee Center application and creates conditional filters applied to the Journey Accelerator application.

Procedure

1. Navigate to **All** > **Employee Center** > **Activity Configuration**, and click the activity you want to configure.

   Note: Set the Activity picker to Employee Center to start this task.

2. Click **New** on the **Activity Configuration Details** tab.
3. To change the scope, set the Activity picker to **Journey Accelerator** [sn_ja_plan].
4. Create filter conditions and or clauses that determine a user's visibility of action plans listed in the Journey Accelerator Plan [sn_ja_plan] table.

   These conditions control what each user can access from Employee Center action plan links.

Filter Conditions and Boolean Operation

Conditions			Boolean Operator
Active	is	true	AND/OR
Manager	is (dynamic)	Me	AND/OR
Mentors can edit	is (dynamic)	Me	or
Mentors can view	is (dynamic)	Me	or

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Filter Conditions and Boolean Operation

Conditions			Boolean Operator
Active	is	true	AND/OR
Employee	is (dynamic)	Me	AND/OR
State	is not	Draft	AND/OR

5. Click **Submit**

Add a Journey Accelerator action plan menu to the Employee Center

Add a list item for Journey Accelerator action plans to the **My active items** list in the Employee Center.

Before you begin

The latest Employee Center is installed. See, Install Employee Center

The Employee Center theme needs to be configured to use the latest user interface. See, Update the Employee Center theme.

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**, and click **Employee Center**.
2. Open the **Main menu** record, and click **More** under Menu Items section.
3. On the **Menu item** form for **More**, click **New**.
4. Fill in these **Menu Item** form fields:

Menu item fields and values

Field	Value
Label	`Action Plans`
Page	`ja_plans` change in of the other fields.

The other fields can remain as they are.

5. Click **Submit**.

Creating and managing audience-specific Journey Accelerator templates

Administrators can develop Journey Accelerator templates for customized plans with stages that include user tasks for different audiences.

Using Journey Accelerator, administrators can develop and manage templates for audience-specific transition plans. Plans include templates with stages and to-do lists. Managers can use these templates to create transition plans for their employees.

For more information about different audiences, see Audiences.

Manage Plan Types

Plan types are the top-level containers for stages and tasks. Administrators select a plan type and a title for the plan when configuring a specific plan. Administrators

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enter a meaningful title for the type of plan that they are creating so that users can easily identify the plan type, such as "IT Senior Tech Promotion." For more information about plan types, see Create and manage Journey Accelerator plan types.

Manage Stage Names

Stages are contained inside the Journey Accelerator plan. Stages contain tasks or to-do lists for managers, mentors, or employees to complete. Stage **Titles** are visible to users. Stages should have an implicitly logical order, such as a time sequence. For more information about stages, see Create and manage Journey Accelerator stages.

Manage Task Templates

Journey Accelerator task templates appear as to-do lists in the plan list view in the Employee Center for managers, mentors, or employees.

Manage Plan Configurations

Plan configurations are based on a plan type. Plan configurations are customized for specific employee audiences. For more information about plan configurations, see Create and manage Journey Accelerator plan configurations.

Manage Plans

Administrators can access and manage plans for specific users after a manager has created a plan. Administrators only update individual plans when the plan's owner (manager) makes a request to do so. For more information about managing plans, see Managing existing Journey Accelerator plans created by managers.

Manage Plan Header Configuration

Administrators can configure the header for different plan types. Default header configurations are available for the different Journey Accelerator roles.

- View for manager
- View for employee
- View for mentor

For more information about updating the default header configurations or creating new plan header configurations, see Customize and manage Journey Accelerator plan headers.

From the Employee Center, managers can create customized Journey Accelerator plans that contain stages with specific to-do lists for themselves, mentors, and employees.

Create and manage Journey Accelerator plan types

Create plan types to manage the top-level classification for stages and tasks in a Journey Accelerator plan.

Before you begin

Role required: admin

About this task

Managers select a plan type when they are configuring a specific plan. As an administrator, you should create a title for a plan type that is meaningful. You want managers to quickly understand what plan type they are using, for example New Hire, Promotion, or Offboarding.

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Procedure

1. Navigate to **All** > **Journey Accelerator** > **Manage Plan Types**.
2. Click **New**.
3. In the **Title** field, enter a meaningful name for the type of plan that you are creating so that it is easily identifiable.

   These fields contain default plan header configurations for the plan type.
   - View for manager
   - View for employee
   - View for mentor

   See, Customize and manage Journey Accelerator plan headers to customize headers for a plan.
4. Click the search icon next to a role to change the header configuration for that role.
5. After you have selected any header configuration you want to change, click **Submit**.

Enable automatic action plan creation

You can configure the Create Journey Accelerator Action Plan template so that a plan is automatically created from a lifecycle event.

Before you begin

The Create a new action plan for your employee activity must be active. See, Activate the Create a new action plan for your employee activity.

Role required: admin

Procedure

1. Navigate to **All** > **Livecycle Events** > **Administration** > **Manage HR Templates**.
2. Open the **Create Journey Accelerator Plan** template.
3. Set **Create plan automatically**.
   - Set **Create plan automatically** to true to automatically create a plan when the lifecycle event activity is created.
   - Set **Create plan automatically** to false create a to-do for Opened for person (manager) in the HR case.
4. Click **Update** to apply and save your changes.
   When **Create plan automatically** is set to true, an action plan is automatically created for the activity in a lifecycle event.

What to do next

Open an HR case to create a Journey Accelerator action plan

Activate the Create a new action plan for your employee activity

Set activities in Lifecycle Events to active to enable the activity to process fulfillment and closure of related events and activities.

Before you begin

Role required: sn_hr_le.admin or sn_hr_le.activity_set_manager

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About this task

The Create a new action plan for your employee activity by default is not active. To create Journey Accelerator action plans, activate the Create a new action plan for your employee activity if it isn't already active.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Manage Activity Configuration**.
2. Click **Create a new action plan for your employee**
3. Select the check box for **Active**.
4. Click **Update**.
   See, Configure the supporting components for a lifecycle event if you want more information about Lifecycle Events and fulfiller activities.

Related topics

Open an HR case to create a Journey Accelerator action plan

Customize and manage Journey Accelerator plan headers

Create customized plan headers for different plan types based on user roles.

Before you begin

Role required: admin

About this task

Journey Accelerator plans use three different roles:

- Manager
- Employee
- Mentor

You can customize the plan header for each role. Customizations include role-based permission, customizing field labels, and setting role-based plan preferences. Plan header fields are available in the Journey Accelerator Plan [sn_ja_plan] table.

Procedure

1. Navigate to **All** > **Journey Accelerator** > **Manage Plan Header Configuration** and click **Default for employee**.
   The default header configuration for the employee role has these fields configured:
   - **Plan created by**
   - **mentor**
2. Click **mentor**.
3. In the **Custom label** field, enter `buddy` to replace mentor.

   Note: A custom field header can only be used for one mentor field. You can customize the mentor field for either **Mentor can view** or **Mentor can edit**.

4. Click **Update** to save the changes to the mentor field.
5. Click **Update** again to save the changes to the header configuration.

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The text **This person's mentor** is changed to **This person's buddy**. This change applies to only the header view of the employee role. Field labels are unique to each role.

The changes are available to use in Journey Accelerator Plan Types.

Related topics

Create and manage Journey Accelerator plan types

Customize field labels in a Journey Accelerator plan header

Customize the labels for fields that are available in the Journey Accelerator Plan [sn_ja_plan] table so that users have a customized and consistent experience. You can use customized plan headers for different plan types.

Before you begin

Role required: admin

About this task

Journey Accelerator plans use three different roles:

- Manager
- Employee
- Mentor

You can customize the plan header for each role. You can also customize role-based permissions, field labels, and role-based plan preferences. Plan header fields are available in the Journey Accelerator Plan [sn_ja_plan] table.

Procedure

1. Navigate to **All** > **Journey Accelerator** > **Manage Plan Header Configuration** , and click **New**.
2. In the **Name** field, enter a meaningful name.
   The name should be meaningful to the role that you are creating the custom header for. For this task, enter `Support Manager Plan Header`.
3. Click **Submit**.
4. Open the plan header configuration that you created.
5. Click **New** .
6. In the Details list, select **Mentors can edit**.
7. In the **Custom label** field, enter `buddy` and click **Update**.
8. Click **Update** again.

Any plan type role that uses this plan header displays the label buddy in the plan header. Labels apply to individual roles. Each role can have its own customized labels.

Configure unique plan headers for different plan types. For more information, see Create and manage Journey Accelerator plan types.

Create and manage Journey Accelerator stages

Create and manage stages that are contained inside the Journey Accelerator plan. Stages contain tasks or to-do lists for managers, mentors, or employees to complete.

Before you begin

Role required: admin

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About this task
Use Journey Accelerator stages to create a logical sequence for task completions. Managers add stages to plans in the Employee Center.

Procedure
1. Navigate to **All** > **Journey Accelerator** > **Manage Stage Names**.
2. Click **New**.
3. In the **Title** field, enter a meaningful name for a stage in a plan.
   For example, Week 1, Day 1, or Month 2.
4. Click **Submit**.

Create and manage action plan task templates

Create and manage the task templates that managers, mentors, and employees can use for their Journey Accelerator plans. Use task templates to provide a consistent and streamlined experience for creating Journey Accelerator plans.

Before you begin
Role required: admin

About this task
Journey Accelerator task templates appear as to-do lists in the Employee Center for managers, mentors, or employees.

Procedure
1. Navigate to **All** > **Journey Accelerator** > **Manage Task Templates**.
2. Create a template or modify an existing template.
   For information about the template fields, see Journey Accelerator task template fields.
3. Click **Submit** or **Update**.

Manage to-do templates created by managers

Modify and manage to-do task templates that managers create.

Before you begin
Role required: admin

About this task

Procedure
1. Navigate to **All** > **Journey Accelerator** > **Manage Manager Task Templates**.
2. Open a task template, or click **New**.
3. Modify or complete the fields in the form.
   For detailed information on the fields in the form, see Journey Accelerator Model Task fields.
4. Click **Submit** or **Update** to save the form.

Create and manage Journey Accelerator plan configurations

Create and manage plan configurations that are based on a plan type. Plan configurations are customized for specific employee audiences.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Journey Accelerator** > **Manage Plan Configurations**.
2. Click **New**, or open an existing plan configuration.
3. On the form, fill in the fields.

Plan Configuration form

Field	Description
Title	Descriptive title so that managers can identify different plan configurations. For example, Sales Employee Plan Configuration.
Audience	Group of users. Select an audience so that you can control which specific groups of users can access the plans.
Active	Option that you can select to make the configuration available for use. **Note:** A plan cannot be active until it contains at least one stage.
Journey Accelerator plan type	Plan types. The top-level classification is used to identify different types.
Short description	Brief description of the plan.
Description	Detailed description of the plan.

4. Click **Save**.
5. To configure the stages for this plan, click **New**.
   a. Select an available stage name.
   b. Click **Submit**.
6. Click **Update**.

Managing existing Journey Accelerator plans created by managers

Plan owners make updates to Journey Accelerator plans only from the Employee Center portal. Administrators should not change existing individual plans.

Changes to existing individual Journey Accelerator plans should be made only from the Employee Center portal by the manager who created the plan.

Configure and manage the Action Plan Guided Tour for Journey Accelerator

As an administrator [admin] or a guided tour administrator [guided_tour_admin], you can manage and update the Action Plan Guided Tour for Journey Accelerator.

Journey Accelerator has a guided tour to help managers learn about action plans and come up-to-speed on the available features.

To access the Action Plan Guided Tour from your ServiceNow instance, navigate to **Guided Tour Designer** > **Guided Tours** and search for `Action Plan Guided Tour` in the name column.

Guided tours help train role-based users on how to use an application's user interface (UI) and features. Tours contain a series of interactive steps a user completes in their browser window. Administrators can manage and modify guided tours. You can find more information about guided tours in these ServiceNow documentation topics.

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- Guided tours : This overview covers many of the features administrators use to create and modify tours.
- Guided Tour Designer interface : Learn about the Guided Tour Designer features and interface.
- Edit a guided tour : This task provides details about how to modify guided tours.

Journey Accelerator integrations

Extend Journey Accelerator capabilities by integrating other application into the Journey Accelerator experience.

Microsoft Exchange Online setup for Journey Accelerator

By integrating the Journey Accelerator scheduling feature with the Microsoft Office 365 calendar function, users can schedule plans and to-do tasks.

Note: If an administrator intends to use the Microsoft Office 365 scheduling capabilities with Journey Accelerator, the administrator must install and configure the related Microsoft plugins and integrations before installing Journey Accelerator.

The Journey Accelerator scheduling feature enables users to schedule Microsoft Office 365 calendar events directly from Journey Accelerator plans and to-do tasks.

If you plan to use the scheduling feature, you must install and configure these plugins and integrations before you install Journey Accelerator. The embedded scheduling feature includes all plugins, integration APIs, and actions.

Some integrations and related plugins require activation by ServiceNow® personnel. Journey Accelerator uses an embedded Microsoft Exchange Online spoke with limitations for use with Journey Accelerator. The use beyond these embedded limitations may require that you get additional licensing or subscriptions.

Journey Accelerator v2

Microsoft AD Spoke [com.sn.ad.spoke]

Provides communication between Journey Accelerator and Microsoft Active Directory to manage objects such as users, groups, and computers.

Microsoft Azure AD spoke [com.sn.azure_ad.spoke]

Provides security requirements to Journey Accelerator so that users, security groups, and office groups are appropriately managed.

Microsoft Exchange Online spoke v2.0.1 [sn_ex_online_spke]

The Microsoft Exchange Online spoke enables creation and management of calendar events and mail in Microsoft Exchange Online.

Journey Accelerator v3 and later

Microsoft Exchange Online Spoke V3.0.0

The Microsoft Exchange Online spoke enables creation and management of calendar events and mail in Microsoft Exchange Online.

Retry Handler Framework

Framework that retries a failed HTTP request when the API rate limits are exceeded and the 429 Too Many Requests status code is returned. The retry-after time HTTP header is used to retry the request again after that specified retry-after time.

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Set these Journey Accelerator system properties

Follow the instructions for setting up the spokes respective to your Journey Accelerator version. After spoke setup is complete, navigate to **sys_properties.list** in ServiceNow and set up the following properties for the Journey Accelerator app.

- sn_ja.calendar_provider_option: Select exchangeOnline
- sn_ja.ex_online_dummy_account_id: Insert `<outlook dummy account for querying meeting times>`
- sn_ja.ex_online_service_account_id: Insert `<outlook service account or delegator for calendar management>`
- sn_ja.ex_online_notification_url: Insert `<webhook URL from Microsoft Exchange Online Spoke>`

Note: When using Microsoft Exchange Online spoke v.2.0.2 with Retry Handler Framework, the scripted rest API for the retry handler framework is used as the webhook URL.

For detailed steps, see Update system properties for Microsoft Exchange Online in the Journey Accelerator app

Related topics

Request IntegrationHub

Update system properties for Microsoft Exchange Online in the Journey Accelerator app

Update the Journey Accelerator app system properties to use with Microsoft Exchange Online features support by Journey Accelerator.

Before you begin

Complete all the steps required for setting up Microsoft Exchange Online Spoke v2.0.2 Microsoft Exchange Online before updating the system properties for the Journey Accelerator app.

See, Microsoft Exchange Online setup for Journey Accelerator for a list of required spokes supported for different versions of Journey Accelerator.

Role required: admin

Procedure

1. Navigate to **All** > **sys_properties.list**.
2. Search **Application** for `Journey Accelerator`.
3. Locate and update the following fields:

Field names and values

Name	Value
sn_ja.calendar_provider_option	`exchangeOnline`
sn_ja.ex_online_dummy_account_id	`<Outlook dummy account for querying meeting times>`
sn_ja.ex_online_service_account_id	`<Outlook service account or delegator for calendar management>`

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Name	Value
sn_ja.ex_online_notification_url	`<webhook URL from Microsoft Exchange Online Spoke>`

Double-click the **Value** to edit.

Note: When using Microsoft Exchange Online spoke v.2.0.2 with the Retry Handler Framework, the scripted rest API for the retry handler framework is used as the webhook URL.

Working with Journey Accelerator plans

Managers, employees, and mentors can access the Journey Accelerator plans through the Employee Center (EC).

For information about the EC, see Employee Center with HR Service Delivery and Employee Center.

Monitor Journey Accelerator plans

Monitor plans and to-do tasks from the Journey Accelerator dashboard.

Before you begin

Role required: Reader [sn_ja.reader]

Procedure

1. Navigate to **All** > **Journey Accelerator** > **Journey Accelerator Dashboard**.
2. Click the items in the dashboard for more details.
   Here is some of the information you can see about Journey Accelerator plans and to-dos.
   - Overdue Plan To-dos
   - Plans in Draft State
   - Plans in Ready State
   - Plans Published in Last 6 Months
   - To-dos Created in Last 6 Months - From Template (True) Vs. Plan Created (False)

Create and track plans for your employees

Create and manage employee transition plans by using Journey Accelerator templates. You can use role-based plans to create consistent plans for different roles on your team.

Before you begin

Role required: All employees with direct reports

Procedure

1. In the Employee Center (EC) portal, click **Action Plans**.

   Note: Depending on the Employee Center configuration, the Action plans menu can be in the top header menu or under the More list menu. You can also access action plans from My active items list.

2. Click **Create action plan**.
3. On the form, fill in the fields.

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Let's start with a few details about this plan form

Field	Description
Who this plan is for	Name of the employee that this plan is for.
Plan type	List of available plan types that are configured for specific groups or types of transitions.
Plan name	Descriptive name of the plan.
This person's mentor	Mentors that you can select. You can also set the mentors' view or edit permission.
Plan description	Details about this plan.

4. Click **Create plan**.

   You can create a plan that is based on the plan types and audience. You can either publish the plan immediately or exit and make changes later. Plans save automatically.

   You can perform the following actions in the plan:

   Edit plans

   - To change the plan name, add or delete mentors, and change the plan description, click **Edit plan details**.

     Note: Mentors are notified when they are added to a plan.

   - To add a stage, click **Create stage**.

   Edit stages and to-do tasks.

   - Reorder to-do tasks by using the drag capabilities in the UI or from the Move down menu in a stage.
   - Rename a stage from the Rename stage menu in the stage.
   - Delete optional to-do tasks.

     Note: Not all editing actions are available for the to-do tasks that are mandatory. You can't delete mandatory to-do tasks.

   - Edit an existing to-do task.
   - Click **Add to-do** to create a to-do task or to choose from a list of available to-do tasks.

   You can assign to-do tasks to users other than the employee or the mentor. These to-do owners receive to-do tasks with access to only their assigned to-do tasks in a published plan.

5. Review the draft and publish or edit the plan.
   Publish:

   - Click **Publish now** to immediately make the plan available.

     Note: Only use Publish now for active users. Publishing a plan before the user is active can incorrectly generate to-do tasks.

   - Click **Publish on a set date** to select a date when you want the plan to be published.

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Edit:

- Click **Edit plan details** to edit the plan name, add or remove a mentor, set a mentor's permission, or edit the plan description.
- Click **Delete plan** to remove the entire plan from the Employee Center.

You can edit existing plans at any time before the plan is marked complete. See Edit existing Journey Accelerator plans.

Edit existing Journey Accelerator plans

Edit existing Journey Accelerator plans by adding, removing, or rearranging stages and tasks to meet the needs of the employee and your team.

Before you begin

Role required: All employees with direct reports

Procedure

1. In the Employee Center portal, click **Plans**.
2. Click the plan that you want to edit.
3. Update, move, or delete stages or to-dos.
   When you're done, click **Exit editing**.

Note:

- Deleting tasks or stages permanently removes them from the plan.
- Plans immediately update with your saved edits.

Manage action plan to-do tasks and create templates

Create, modify, and manage to-do tasks for employees and mentors as part of your management responsibilities.

Journey Accelerator action plans can be customized for employee transitions. Part of that customization is a managers ability to add, delete, modify, and save to-do tasks. Save the to-do tasks you create as templates to save time and provide consistent experiences for employees and mentors.

Add or modify an action plan to-do

Create, modify, and save to-do tasks as part of an action plan. To-dos are assigned to employees, mentors, or managers to complete.

Before you begin

Role required: All employees with direct reports

Procedure

1. Navigate to **All** > **Employee Center** > **Action plans**, and open an action plan.
2. Click **Add to-do** or open an existing task in a stage.
3. Choose the option that is best suited for your employee or mentor.

Option	Description
Select from the To-do template list	Select from a list of available to-do task tem plates and click **Next**. Templates make it easy

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Option	Description
	and fast to create consistent to-do tasks for more than one employee or mentor.
Click Create your own	Click **Create your own** to create a to-do from scratch. Creating a to-do from scratch is a good option to create a unique task for a sin gle employee or mentor.

4. Fill in the to-do form.

   Note:

   - For to-dos that are appropriate for more than one employee or mentor, select **Save as Template**. Save the to-do as a template so that it is available to use for other employees or mentors in future action plans.
   - The Action plan to-do task fields topic has descriptions of the To-do form fields.

5. Click **Save**.

Employees view and complete action plans

View, manage, and track your action plan progress from the Employee Center portal.

Before you begin

Role required: Any employee assigned to a plan has access to the plan. You can be assigned as the employee or mentor.

About this task

Your manager creates plans for different employee transition events. When you can access your plan from the Employee Center portal, you see only your assigned tasks if your plan is in the Ready or Complete state.

Note: Tasks in your plan are also listed under To-dos. The To-dos list does not show the stage that contains the task.

Procedure

1. In the Employee Center portal, click **Plans**.
2. Click the plan that you want to work on.

   Stages contain the tasks for you to complete.

3. To view details about a particular task and to manage its progress, click that task.
   You can manually update the status of a task and add additional details when needed. The different statuses are as follows:

   - **Mark as in progress**: Updates that record for the task so that others can see that you started working on the task.
   - **Complete**: Shows that you completed the task.
   - **Comments**: Sends messages to the plan manager.
   - **Attachments**: Adds files, such as certificates of completion, for training or other documents.

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Mentor employees by using a Journey Accelerator plan

Mentor employees that are assigned to you and view or edit employee plans depending on your permission type.

Before you begin

Role required: You must be assigned as a mentor to an action plan.

About this task

Managers create plans for different employee transition events. Some transitions include having a mentor. Mentors access plans from the Employee Center portal.

There are two types of mentor permissions:

Can view

Mentors see all tasks in a plan. Mentors with the Can view permission can only update the tasks that are assigned to them. Mentors can view plans in Draft, Ready, or Complete states.

Can edit

Mentors with the Can edit permission can edit, add, and delete stages or to-do tasks. The Can edit permission enables mentors to publish plans and set plan publish dates.

Note: Tasks in a plan are also listed under To-dos. The To-dos list does not show the stage that contains the task.

Procedure

1. In the Employee Center portal, click **Plans**.
2. Click the plan that you want to work on.

   Stages contain tasks to complete.

   The type of mentor permission restricts or enables edit access to plan stages, to-do tasks, and publishing a plan.

3. Click a task to view or edit its details so that you can manage the progress of it.
   Manage tasks manually. Mark your tasks and add additional details when needed. You can choose the following task statuses:
   - **Mark as in progress**: Updates that record for the task so that others can see that you started working on the task.
   - **Complete**: Shows that you completed the task.
   - **Comments**: Sends messages to the plan manager.
   - **Attachments**: Adds files, such as certificates of completion, for training or other documents.

Journey Accelerator reference

Reference topics provide additional information about the lists and forms that you use to configure and use Journey Accelerator .

Journey Accelerator task template fields

To make a task template, fill in the Journey Accelerator task template fields.

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Task template fields and description

Field	Description
Name	Descriptive name for the activity that is associated with the task.
Table	Table that is used to track tasks and fields. Select the Journey Accelerator Task [sn_ja_task] table to enable access to the template fields.

Template	Template fields that appear only when a table is selected. Template fields are tracked in the Journey Accelerator Task [sn_ja_task] table.
	
	The following settings apply to the overall properties of the task:
	• **Mandatory**: Set to **true** to make the task required. Set to **false** to make the task optional.
	• **Type**
	  ○ **Regular**: Standard to-do task template.
	  ○ **Calendar**: Schedulable task. Creates to-do task linked to Microsoft Office 365 calendar event.

Active	Option that enables the task template when selected. Only active tasks are available for managers to use.
Task short description	Brief description of the task. This text appears to users from the Journey Accelerator plan. This field appears in the **Short description** field when you are managing tasks in stages.
Task description	Detailed description of the task.
Parent plan table	Higher-level table that associates an entry in the Journey Accelerator Task [sn_ja_task] with the table that tracks plans, Journey Accelerator Plan [sn_ja_plan]. Selecting the Journey Accelerator enables access to the plan-related fields.
Assign to source	User who is assigned the task: • Employee • Manager

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Task template fields and description (continued)

Field	Description
	• Mentor **Note:** Initially, only the first mentor is assigned with to-do tasks in the list with multiple entries. Managers can reassign the to-do tasks to other mentors after the plan is created.
Relative due date trigger	Condition that is used to trigger when a task is assigned based on the publish date of the plan. This condition is evaluated with **Date offset type** and **Date offset type**. • **Created** • **End on** • **Start on** • **Updated** **Note:** Only use the **Start on** condition. **Start on** is selected by default.
Date offset type	Condition that is used to trigger when a task is assigned. This condition is evaluated with **Relative due date trigger** and **Number of offset days**. • **On** • **After** **Note:** The **After** condition is the default selection. We recommend that you use only the After condition.
Number of offset days	Condition that is used to trigger when a task is assigned. This condition is evaluated with **Relative due date trigger** and **Date offset type**. • **Days** • **Hours**

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Task template fields and description (continued)

Field	Description
	Note: Only specify days, and keep hours set at 0 (zero). For example: If the `Relative Due Date Trigger = Start On`, `Date Offset type = After`, and `Number of offset days = 5 days`, the task is configured to trigger 5 days after the publish date of the plan.

Journey Accelerator Model Task fields

Managers create to-do tasks that are saved as templates. The templates are stored as a Journey Accelerator Model Task.

Model template fields and descriptions

Field	Description
Task name	The name of the to-do as it appears in an action plan.
Owner	The manager that created the to-do task template.
Additional assignee list	Adds user to the **Additional people** field of the to-do task.
Assigned to type	• Persona: One of the personas supported for action plans. (manager, employee, mentor) • User: A single user. **Note:** The availability of other fields depends on your selection. The persona is listed in the **Assigned to source** field.
Parent plan table	The table that contains the to-do task template information (Journey Accelerator Plan [sn_ja_plan]).
Assigned to source	The persona to which the to-do task is assigned.
Assigned to	The name of a single user.
Active	Select to make the plan available. Clear the check mark to hide the template from users.
Mandatory	Select to make the to-do task mandatory. Clear the check mark to make the task optional.

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Model template fields and descriptions (continued)

Field	Description
Journey Accelerator task type	• Regular: Task without the scheduling feature. • Calendar: Available when Journey Accelerator is configured to work with a calendar such as Microsoft Exchange Online
Due date configuration	A conditional due date for the task.
Number of days/weeks	The days or weeks from the assigned condition for when the task is due.
Task description	The description of the task that is visible to the users.

Action plan to-do task fields

The to-do form contains fields that a manager uses to customize tasks for employees and mentors to complete as part of a transition plan.

To-do form fields and descriptions

Field	Description
To-do name	The name of the to-do to appear as the heading or title of the task.
Stage	Select from the list of available stages included in the action plan.
To-do description	A description of the task that appears in the action plan to-do.
Who this to-do is for	The name of the employee or mentor to whom this to-do task is assigned.
Other people	Assign this to-do to additional people. People have different access and responsibilities based on their role (employee or mentor).
Due Date	Set a due date based on a specific date or a relative date from the date the action plan is published. • An exact date • A number of weeks after publishing • A number of days after publishing • No due date
This to-do is optional	Mark the to-do as optional to give employees or mentors the option not to complete this task.

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To-do form fields and descriptions (continued)

Field	Description
Add scheduling to this to-do	Enable scheduling for this task. Your organization must be using Microsoft Online Exchange to enable this feature.
Attachments	Drop files in this field to include them as an attachment to the to-do.
Save as Template	Save a to-do as a template so that you can use it in other action plans.

Components installed with Journey Accelerator

Several types of components install with the activation of the Journey Accelerator application, including user roles and tables. There are also dependencies on other features or apps.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for the Journey Accelerator application. If you want to install the demo data, click **Load demo data** when installing this application. Demo data includes sample records and configurations for common use cases.

Roles installed

Role titles and descriptions

Role title [name]	Description	Contains roles
Administrator [sn_ja.admin]	Grants access to create and manage all Journey Accelerator components, tables, and data.	• [sn_ja.modifier] • [sn_cd.content_manager]
Modifier [sn_ja.modifier]	Grants access to modify all Journey Accelerator plans, stages, and to-dos.	[sn_ja.reader]
Reader [sn_ja.reader]	Grants access to read all Journey Accelerator plans, stages, to-dos, and dashboards.	none

You can assign these roles to the appropriate roles, groups, or users in your application.

- To assign a role to another role, see Add a role to an existing role.
- To assign a role to a group, see Assign a role to a group.
- To assign a role to a user, see Assign a role to a user.

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Tables installed

Table names and descriptions

Table name [name]	Description
Journey Accelerator Plan Header Field [sn_ja_plan_header_field]	Tracks the fields that are available for configuration in the plan header.
Journey Accelerator Model Task [sn_ja_model_task]	Contains Journey Accelerator task records used to copy a task.
Journey Accelerator Plan [sn_ja_plan]	Contains Journey Accelerator plans and manages associations with related tables.
Journey Accelerator Plan Configuration [sn_ja_plan_config]	Contains details about Journey Accelerator plan configurations.
Journey Accelerator Plan Header Configuration [sn_ja_plan_header_config]	Tracks fields used for plan header configuration.
Journey Accelerator Plan Type [sn_ja_plan_type]	Tracks the different Journey Accelerator plan types.
Journey Accelerator Stage [sn_ja_stage]	Contains Journey Accelerator stage details and relationships to other Journey Accelerator tables.
Journey Accelerator Stage Configuration [sn_ja_stage_config]xx	Contains details about a stage's configuration.
Journey Accelerator Stage Name [sn_ja_stage_name]	Tracks the names of the different Journey Accelerator stages.
Journey Accelerator Task [sn_ja_task]	Contains Journey Accelerator task details and relationships to other Journey Accelerator tables.
Journey Accelerator Task Template [sn_ja_task_template]	Contains details about Journey Accelerator task templates.
Journey Accelerator Task Template for Stage Config [sn_ja_m2m_stage_task_temp]	Used to maintain the relationship of task templates to Journey Accelerator task templates.

For more information on table administration and how to manage data, see Table administration.

Lifecycle Events

Lifecycle Events enable the fulfillment of HR cases that are related to various employee journeys and transitions.

The Lifecycle Events app helps to facilitate daily activities among various cross-functional processes and departments. It makes completing processes that relate to an employees daily life more efficient and easier.

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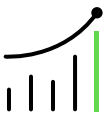
Explore  Define and document the lifecycle event process.	Configure enterprise lifecycle events  Enable the automation of onboarding and other employee lifecycle events that span across company departments.	Configure lifecycle events  Enable and configure digital workflows to manage employee lifecycle events through a single service delivery platform.
Use  Build lifecycle events to automate fulfillment of HR cases.	Analytics and Reporting Solutions  Lifecycle Events dashboards provide visibility into lifecycle events.	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Lifecycle Events

Lifecycle Events enables you to automate the fulfillment of HR cases such as new hire onboarding.

Lifecycle Events overview

The Lifecycle Events app helps to facilitate daily activities among various cross-functional processes and departments. It makes completing processes that relate to an employees daily life more efficient and easier.

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Lifecycle Events benefits

benefits

Benefit	Feature	Users
Lifecycle events	Build a lifecycle event and its associated activity sets and activities with the lifecycle event builder.	sn_hr_le.admin or sn_hr_le.activity_set_manager
Lifecycle event test tool to thoroughly test a lifecycle event before launching it.	Acquire different views of a lifecycle event.	sn_hr_le.admin or sn_hr_le.activity_set_manager
Lifecycle Events employee requests	Enables managers and employees to open employee requests directly from Lifecycle Events.	sn_hr_le.admin or admin

What to explore next

To learn more about configuring and using Lifecycle Events, see:

- Configuring Lifecycle Events
- Using Lifecycle Events
- Lifecycle Events reference

Lifecycle event dashboards

Use lifecycle event dashboards to gain visibility into active lifecycle event and onboarding cases.

There are two dashboards available with the Human Resources Scoped App: Lifecycle Events (com.sn_hr_lifecycle_events) plugin:

- Active Lifecycle Event Cases
- Active Onboarding Cases

The Onboarding Executive View dashboard requires the Performance Analytics - Content Pack - Human Resources Lifecycle Events Scoped App [com.sn_hr_lifecycle_pa] plugin.

Active Lifecycle Event Cases

- The **Active Lifecycle Event Cases** dashboard provides a list of all active lifecycle events or onboarding cases with the subject person, state, assigned to, and opened for information. You drill into each case using this dashboard.
- It also provides charts for active and overdue tasks.

Active Onboarding Cases

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- The **Active Onboarding Cases** dashboard provides a view into active onboarding cases with the following tabs:
  - Employees that have started
  - Employees starting this week
  - Employees starting next week
  - Employees starting later
- It also provides charts for active and overdue onboarding tasks.

Onboarding Executive view

- Provides management a review of onboarding new hires and areas in the process that can be improved.
- The **Overview** tab shows a recap of new hire onboarding cases. Data on the number of onboarding cases that have not yet started, in various stages, and overdue activities appear.
- The **Activity Analysis** tab shows bottlenecks in the onboarding process. Details on each activity set per week by fulfiller or employee. The time it takes to close activities and overdue activities by fulfiller and employee also appears.
- The **New Hire Experience** tab shows the results of the new hire survey that helps measure the new hire experience. Information on employees leaving within a year also appears.

See, Performance Analytics

Configuring Lifecycle Events

Plan and configure Lifecycle Events.

Configuration overview

1. Activate Lifecycle Events for Enterprise
2. Activate Lifecycle Events

Activate Lifecycle Events for Enterprise

You can activate the Human Resources Scoped App: Lifecycle Events for Enterprise plugin [com.sn_hr_lifecycle_ent] if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Role required: admin

About this task

Human Resources Scoped App: Lifecycle Events for Enterprise enables you to automate onboarding and other employee lifecycle events that span across multiple departments such as IT, Facilities, Finance, and Legal.

It activates these related plugins if they are not already active.

Plugins for Human Resources Scoped App: Lifecycle Events for Enterprise

Plugin	Description
Human Resources Scoped App: Core	Provides core HR features.

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Plugins for Human Resources Scoped App: Lifecycle Events for Enterprise (continued)

Plugin	Description
[com.sn_hr_core]	
Employee Service Center [com.sn_hr_service_portal]	Provides Employee Center.
Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events]	Provides lifecycle events.
Document Templates [com.snc.document_templates]	Provides Document templates.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Activate Lifecycle Events

You can activate Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events] if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Role required: admin

About this task

Human Resources Scoped App: Lifecycle Events enables you to easily configure digital workflows to manage employee lifecycle events through a single service delivery platform.

It activates these related plugins if they are not already active.

Plugins for Human Resources Scoped App: Lifecycle Events

Plugin	Description
Human Resources Scoped App: Core	Provides core HR features.

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Plugins for Human Resources Scoped App: Lifecycle Events (continued)

Plugin	Description
[com.sn_hr_core]	
Employee Center [com.sn_hr_service_portal]	Provides Employee Center.

Using Agent Workspace with Lifecycle Events

To use Agent Workspace with Lifecycle Events, you must activate:

Human Resources Scoped App: Workspace [com.sn_hr_agent_workspace] plugin

Using Playbook with Lifecycle Events

To use Agent Workspace and Playbook with Lifecycle Events, you must request the Playbook plugin from the ServiceNow Store.

Note: For more information on requesting a ServiceNow Store plugin, see Install a ServiceNow Store application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Lifecycle event script includes and APIs

Script includes call workflows within Lifecycle Events.

The following script includes are provided with Lifecycle Events:

Script includes installed with Lifecycle Events

Name	Description
hr_ActivitySet	Main script include for Lifecycle Events workflows and activity management.
LaunchActivities	API to launch an instance of all activities under an activity set. Called when a Lifecycle Event case is created.

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Script includes installed with Lifecycle Events (continued)

Name	Description
getAvailableDependentActivitySets(activitySet)	Retrieves a collection of dependent activity sets for an activity set.
isActivitySetCompleted	Checks when all activities in a set are complete.
IsActivitySetActive	Checks when an activity set is active.

The following APIs are provided with Lifecycle Events: hr_LEType - Contains methods related to Lifecycle Event types, activity sets, and activity set activities.Methods related to Lifecycle Event Types:

- createLEType(@param - REQUIRES: Array of js objects having field name value pairs) - Returns js object with status - 'success'.
- updateLEType(@param - REQUIRES: Array of js objects having field's name value pairs and Lifecycle Event Type Id) - Returns js object with status - 'success'.
- removeLEType(@param - REQUIRES: Lifecycle Event Type Id) - Returns js object with status - 'success'.

Methods related to Activity Sets:

- createActivitySet(@param - REQUIRES: Array of js objects having field's name value pairs) - Returns js object with status - 'success'.
- updateActivitySet(@param - REQUIRES: Array of js objects having field's name value pairs and ActivitySetId) - Returns js object with status - 'success'.
- removeActivitySet(@param - REQUIRES: activitySetId) - Returns js object with status - 'success'.

Advanced:

- Hr_triggerUtil – Convenience methods for advanced scripting on running activity sets.
- checkActivitySetsCompleted(activitySetList) – Verify when activity sets in the list are complete.
- checkForElapsedDate(date) – Verify when the date passed in has elapsed.
- checkForElapsedDateWithOffset(date, offset, offsetUnits, offsetType)

Lifecycle Events workflows

The **HR Activity Set Launcher** workflow drives the entire lifecycle event process. Associated workflows drive each of the activity sets within a lifecycle event.

When a lifecycle event case is created:

- The **Invoke Activity Set Launcher Workflow** business rule runs.
- The **HR Activity Set Launcher** workflow starts.
- The workflow runs during the lifecycle event case and manages the activity sets.

Note: You can access the workflows from **Execution Contexts**.

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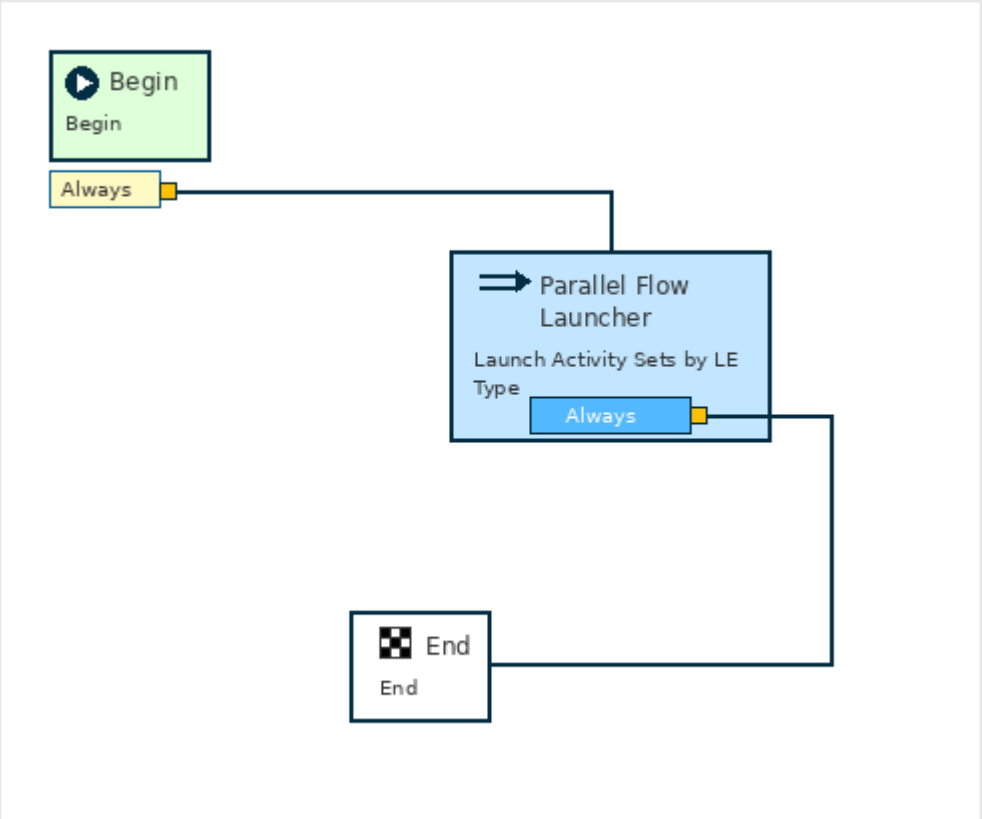

Each activity set in a lifecycle event has an associated workflow. Each workflow:

- Monitors trigger conditions and dependencies on other activity sets to generate activities.
- Checks the status of activities in the workflow every four hours (default) for activity sets triggered by date or a custom script.
- Checks the status of activities when an activity case or request is updated.
- Closes the activity set when activities are marked complete.

The base system limits the total number of activity sets that can run at the same time to 25. This value can be increased, but system performance can be affected.

Note: The **Evaluation interval** field is not revealed by default. This field works with the **Max activity count** field on the **Activities** tab under Workflow Properties. See Workflow properties . If you reveal the **Evaluation interval** field with the intention of changing the default value (four hours), use caution. Frequent updates mean that more events fire and could cause your lifecycle event activity sets to cancel before the Lifecycle Event completes. For workflows associated with Lifecycle Events, the value of the **Max activity count** field has been increased to accommodate long running business processes that contain multiple workflow activities. For an alternative method, see Lifecycle Events evaluation interval.

1. Open Workflow Editor.
2. From Workflows, select **HR Activity Set Launcher**.
3. Under Parallel Flow Launcher, click the **Activity Properties**.
4. Update the **Max Simultaneous** value.

See Parallel Flow Launcher workflow activity .

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Migrate Lifecycle Events workflows

Lifecycle Events customers upgrading from the Washington DC or Xanadu release to the Yokohama release can use a system property to define the workflow technology that the Lifecycle Events app uses for its base system workflows.

Before you begin

Role required: admin [sn_hr_le.admin]

About this task

In the Yokohama release, existing customers with Lifecycle Events can use the *sn_hr_le.use_flow* property to migrate each base system workflow that is installed with the app from workflow to flow. This migration enables Lifecycle Events to use flow, the current workflow technology for process automation, rather than workflow, an older workflow technology associated with a legacy product.

The following Lifecycle Events workflows are migrated to flows when you set the **Value** field to **True** in the *sn_hr_le.use_flow* property:

- Account Notification
- Add LE activity user to Pulse Survey
- HR Activity Launcher
- HR Activity Set Launcher
- HR Activity Set Trigger Check
- Lifecycle Event Case Approval
- Lifecycle Event Notification

Additionally, two configurations are added to the Activity Configurations [sn_hr_le_fulfiller_activity_config] table when you set the **Value** field to **True** in the *sn_hr_le.use_flow* property. The configurations for the following activities are added to the table to support the corresponding flows:

Lifecycle Events activities and corresponding flows

Activity	Flow
Approval	Lifecycle Event Case Approval
Notification	Lifecycle Event Notification

The **Configuration Type** field is set to **Flow (Template)** in the Activity Configuration record for the previously mentioned activities to support the use of flow.

The **Value** field in the *sn_hr_le.use_flow* property has different default values depending on whether you're an existing or new Lifecycle Events customer. Beginning with the Yokohama release, for new customers implementing Lifecycle Events, the **Value** field in the *sn_hr_le.use_flow* property is set to **True** by default. Conversely, for existing customers with Lifecycle Events who are upgrading to the Yokohama release, the **Value** field in the *sn_hr_le.use_flow* property is set to **False** by default.

Important: This task pertains to existing customers with Lifecycle Events who are upgrading to the Yokohama release. Existing customers should perform this task in a non-production instance to validate whether the underlying changes to Lifecycle Events produce any adverse effects. Only perform this task in your production instance after you thoroughly test and are satisfied with the results.

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Procedure

1. Navigate to the **All** menu, and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.
2. Select **Name** from the drop-down list associated with the **Search** field.
3. In the **Search** field, enter `*sn_hr_le`.
   A list of system properties associated with Lifecycle Events appears.
4. Select the *sn_hr_le.use_flow* property.
5. Use the **Value** field to specify the option that corresponds with the workflow technology you want Lifecycle Events to use for its base system workflows.

Option	Description
True	Flow
False	Workflow

6. Select **Update**.

What to do next

Using Lifecycle Events builder, delete your existing activity for an approval and recreate a new one. To help identify your existing activity for an approval, ensure the **Activity Type** field in the corresponding Activity record is set to **Approval**.

A new activity for an approval must be created so it can use the corresponding configuration for an approval in the Activity Configurations table. The activity for an approval that you create after setting the **Value** field to **True** in the *sn_hr_le.use_flow* property uses the Activity Configuration record containing the following field values:

- **Activity** field set to **Approval**.
- **Configuration Type** field set to **Flow (Template)**.

For more information about the Lifecycle Events activity creation process, see Configure a lifecycle event activity.

Using Lifecycle Events

Use Lifecycle Events to automate the fulfillment of HR cases such as new hire onboarding.

Overview of Building a lifecycle event

Each lifecycle event is a collection of activities that often span multiple departments and are organized into activity sets. To configure a lifecycle event, you must first document the business process for your event. Next, you must configure all of the supporting components. You can then configure the lifecycle event and its associated activity sets and activities. Finally, you configure a corresponding HR service so that the lifecycle event can be requested for service.

Building a lifecycle event

- Building a lifecycle event

  Build a lifecycle event with a collection of activities.

- Lifecycle Events employee requests

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Track requests that are opened by users from within Lifecycle Events. Requests from users can be either an HR service or a catalog item.

- Create an HR case for a lifecycle event

  Create a lifecycle event case. A lifecycle event case is an HR case that is fulfilled by a lifecycle event. For example, the HR service for New Hire Onboarding is fulfilled by the lifecycle event for New Hire Onboarding.

Building a lifecycle event

Lifecycle events enable you to automate the fulfillment of HR cases such as new hire onboarding.

Each lifecycle event is a collection of activities that often span multiple departments and are organized into activity sets. To configure a lifecycle event, you must first document the business process for your event. Next, you must configure all of the supporting components. You can then configure the lifecycle event and its associated activity sets and activities. Finally, you configure a corresponding HR service so that the lifecycle event can be requested for service.

Note: If you are further customizing an existing lifecycle event, follow the configuration tasks as applicable.

Related topics

Lifecycle Events employee requests

Clone a lifecycle event

Filter lifecycle event activities

Lifecycle event properties

Support multiple jobs in a lifecycle event

Configure the UI of the lifecycle event builder

Create an HR case for a lifecycle event

Document the lifecycle event process

Define and document the lifecycle event process. Lifecycle events are generally cross-departmental and require action from different departments.

It is thus critical that everyone agrees on the flow and their areas of responsibility. As you map out a lifecycle event, consider who is responsible for owning the activity, what the activity type is, and if there is a targeted audience for that activity.

Defining the lifecycle event

As you map out and define your lifecycle event, consider the following.

- What is the lifecycle event type? Examples of lifecycle events include employee onboarding, offboarding, and parental leave.
- What are the different stages of the lifecycle event? These stages are represented as activity sets, which act as containers for the associated activities. Each activity set is triggered based on specified conditions.
- What are the different activities for each activity set? For each activity, determine the appropriate owning group, activity type, and audience.

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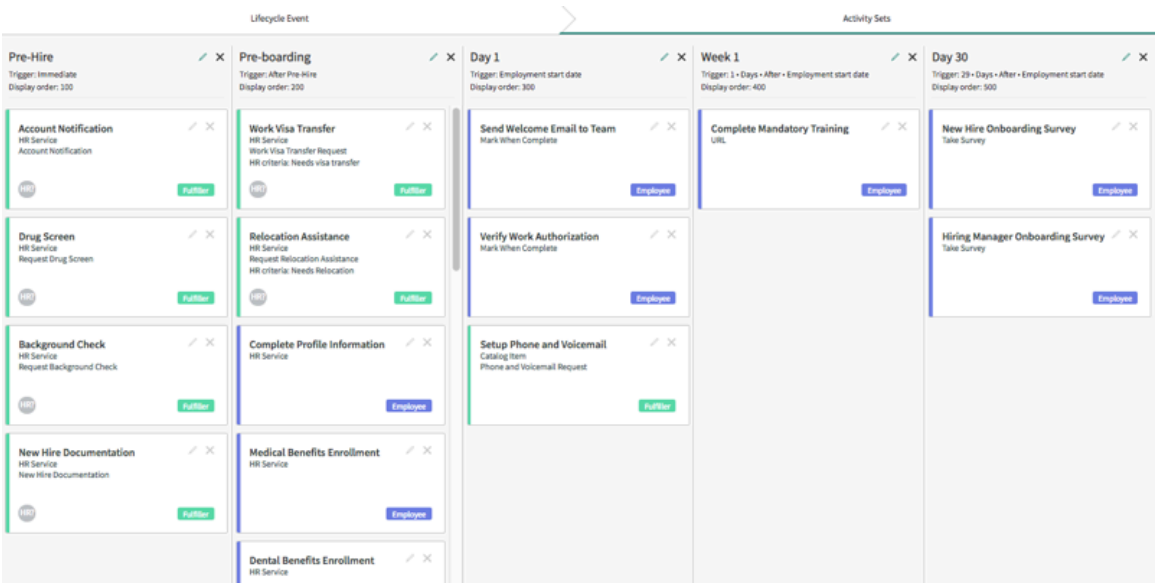
- Who owns the activity? Lifecycle events generally span multiple departments. Each activity must be owned by the relevant group that is responsible for overseeing and maintaining that activity, such as HR, IT, or Facilities.
- What is the activity type? Is it a task for an employee or fulfiller? An approval or notification?
  - Approvals
  - Tasks for employees
  - Activities for fulfillers, which can be configured as order guides, catalog items, HR services, HR tasks, incidents, and more
  - Notifications
- Is there a targeted audience for the activity? Some activities are not required for all employees, and you can use audience records to target the activity to the appropriate user types.

Example: New hire onboarding

New hire onboarding is a lifecycle event that is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin. The event is organized into activity sets, such as pre-hire, pre-boarding, and day one, which represent different stages in the lifecycle event process. Each activity set contains one or more activities, such as a task for the employee to enroll in medical benefits or a request for an IT fulfiller to set up a new hire's phone and voicemail.



Configure the supporting components for a lifecycle event

Configure the supporting components for a lifecycle event. Lifecycle events are a collection of activities. For each activity, you must identify and configure the underlying components that support it, such as HR task templates, order guides, catalog items, and HR services. You must also identify and configure the relevant owning groups, activity types, and audience records.

- Owning groups
- Activity types
- Audiences

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Owning groups

Owning groups control who owns a lifecycle event activity. Because lifecycle events are generally cross-departmental, it's critical that ownership of each activity is assigned to the appropriate group, such as for HR, IT, or Facilities. Each owning group is responsible for overseeing the activities that fall under their purview. See Configure an owning group for a lifecycle event for more information.

To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role. For example, only members of the HR activity writers owning group with the sn_hr_le.activity_writer role can configure an HR activity.

Activity types

Lifecycle event activities can be approvals, employee activities, fulfiller activities, notifications, and more. Depending on the activity type, you must configure the appropriate components that underlie it.

A key benefit of the Enterprise Onboarding and Transitions application is that you can reuse existing components and processes. These components and processes include existing HR services, HR task templates, or catalog items. For each activity, determine whether there's an existing component that you can use or if you must configure a new one.

Activity types and corresponding configuration requirements

Activity type	Configuration requirements	
Approval	N/A To learn more about approvals, see Approvals.	
Employee task	Configure an HR task template To learn more about HR templates, see HR templates.	
Fulfiller activity	Depending on the fulfiller activity type, configure the appropriate supporting components. **Note:** The following fulfiller activity types are preconfigured with the Enterprise Onboarding and Transitions application. To configure additional types, see Configure an activity configuration for a lifecycle event.	
	Automated Order Guide	Create an order guide To learn more about order guides, see Order guides.
	Catalog item	Create or edit a catalog item To learn more about catalog items, see Service catalog items.
	HR service	Configure an HR service

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Activity types and corresponding configuration requirements (continued)

Activity type	Configuration requirements	
		To learn more about HR services, see HR services.
	HR task	Configure an HR task template To learn more about HR templates, see HR templates.
	Incident	Create an incident template To learn more about incident management, see Incident Management.
Notification	Create an email template To learn more about notifications, see Notifications.	
Flow	Create a subflow **Important:** The only subflow available for use by default is the **Switch primary job** subflow. This subflow is used to support multiple jobs in a lifecycle event. To use a different subflow for an activity, additional configuration is required. See the Implementing multiple subflows in an LE activity [KB0817520] article in the HI knowledge base for more information. To learn more about subflows, see Subflows.	
Content	Configure a schedule content template for a lifecycle event activity To learn more about Content Experiences and Content Publishing, see Content Publishing.	
Activity container	N/A	

Audiences

Not all lifecycle event activities are required for all employees. Some activities are intended for a target audience. You can use audience records to define the criteria that the subject person of a lifecycle event case must meet for the activity to trigger on their behalf. For more information, see Audiences.

Clearly defined audience criteria enable you to create targeted workflows for different audience types. For example, you can create a tailored onboarding experience for newly hired employees depending on whether the employee is office-based or remote.

Note:

- If an activity isn't associated with an audience record, then the activity triggers for all employees.
- If a subject person doesn't meet the audience criteria defined for an activity set during the evaluation process, the **State** field in the corresponding activity set is set to **Skipped**.

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Configure an owning group for a lifecycle event

Create or modify an owning group to define the user group that owns a lifecycle event activity. Each owning group is responsible for overseeing the activities that fall under their purview.

Before you begin

Role required: sn_hr_le.admin

To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role. For example, only members of the IT activity writers owning group with the sn_hr_le.activity_writer role can configure an IT activity.

Procedure

1. Navigate to **All** > **LIfecycle Events** > **Administration** > **Manage Owner Groups**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Group form

Field	Description
Name	Name of the owning group.
Manager	Manager of the owning group.
Description	Description of the owning group.
Group email	Email address to associate with the owning group. This email acts as a group notification that sends an email to every member of the group.
Parent	Parent group to associate with the owning group.

4. Click **Save**.
5. In the **Roles**, **Group members**, **Groups**, and **Skills** related lists, assign the appropriate roles, users, groups, or HR skills to the owning group.

Related lists and corresponding descriptions

Related list	Description
Roles	Roles assigned to the owning group. **Note:** Any roles assigned to the parent group are automatically assigned to the owning group.
Group members	Users assigned to the owning group.
Groups	Groups assigned to the owning group. **Note:** Any groups assigned to the parent group are automatically assigned to the owning group.
Skills	HR skills assigned to the owning group.

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Related list	Description
	Note: Any HR skills assigned to the parent group are automatically assigned to the owning group.

6. Click **Update**.

Configure an activity configuration for a lifecycle event

Create or modify an activity configuration to define the fulfillment process and conditions for closure for a lifecycle event activity.

Before you begin

Role required: sn_hr_le.admin or sn_hr_le.activity_set_manager

A key benefit of the Enterprise Onboarding and Transitions application is that you can leverage existing fulfillment processes from different departments to fulfill lifecycle event activities that are assigned to them. For example, you can use a fulfillment process set up by the IT department to fulfill lifecycle event activities assigned to IT. Preconfigured activity types are available to use. You can also configure your own custom activity types.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Activity Configuration**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Fulfiller Activity Configuration form

Field	Description	
Fulfiller activity	Name of the fulfiller activity type.	
Configuration type	Configuration type. Select one of the following:	
	Catalog item	Creates a task, request, or case based on an existing catalog item. In the **Catalog** field, select a catalog.
	Content	
	Flow	Creates a flow on the parent lifecycle event case. **Note:** A flow automates a process with a sequence of reusable actions. See Flow designer for more information.
	HR service	Creates a case based on an HR service.
	HR task template	Creates a task based on an HR task template.
	Order guide	Creates an IT request based on an order guide. In the **Catalog** field, select a catalog.
	Template	Creates a record on a task table that supports templates.

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Field	Description	
	Workflow	Creates a workflow on the parent lifecycle event case. In the following fields, provide the following: ○ **Workflow**: A workflow that runs on the parent lifecycle event case. ○ **Workflow required fields**: Fields on the activity form that are required to be populated for the workflow. ○ **Workflow optional fields**: Fields on the activity form that are optional and populated for the workflow.
Activity closure	Conditions that must be met for the fulfiller activity to close and for the State value to change to Completed. **Note:** Once all of the activities in an activity set are completed, then the State value of the activity set will change to Finished.	
Active	Option to activate the fulfiller activity type for use.	
Task table	Table that the fulfiller activity type is associated with. Depending on the **Configuration type** selected, you can select a table or the field is automatically set to a table.	
Badge	Badge that the fulfiller activity type is associated with. **Note:** Badges display on the portal to indicate to the employee which department is fulfilling that activity. See Configure an HR badge for more information.	

4. Click **Save**.
5. In the **Fulfiller Activity Configuration Mappings** section, map one or more fields from the parent lifecycle event case to the child activity.

   a. Click **New** or open a record.

   b. Fill in the fields on the form.

Fulfiller Activity Configuration Mapping table

Field	Description
Activity type configuration	This field is automatically set to the name of the fulfiller activity type.
Map from table	HR case table that the parent HR service is associated with. **Note:** Make sure that this table matches that of the HR case table associated with the parent HR service.
Map from field	Field that is being mapped from.

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Field	Description
	Note: Make sure that the data type matches that of the target field.
Map to table	This field is automatically set to the table that the fulfiller activity type is associated with.
Map to field	Field that is being mapped to. **Note:** Make sure that the data type matches that of the source field.

Example
For example, the preconfigured fulfiller activity type for catalog items maps the subject_person field from the HR Lifecycle Events Case [sn_hr_le_case] table to the requested_for field on the Request [sc_request] table so that the activity form is automatically populated with the name of the user that the catalog item is being requested for.

c. Click **Submit** or **Update**.

d. Repeat the process as needed.

6. Click **Update**.

Configure a schedule content template for a lifecycle event activity

Create or modify a schedule content template to deliver content as part of a lifecycle event. Each template must be associated with the Schedule Content [sn_cd_content_visibility] table, and you can configure the template for mobile content, portal content, notification content, or to-do content.

Before you begin

Have the content that you want to use with the schedule content template. You can use the following types of content:

Content types

Content type	Description
Configure mobile content	Mobile content is delivered as a mobile banner in the Now Mobile and Mobile Onboarding apps.
Content Publishing	Portal content is delivered as content (such as a banner, calendar, or video) in a portal such as the Employee Service Center.
Notification content	Notification content is delivered as a notification.
Creating to-do content that appears in a banner or styled content	To-do content is delivered as a to-do in both portal and mobile.

Role required: admin

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Procedure

1. Navigate to **All** > **System Definition** > **Templates**.
2. Click **New** or open a record.
3. Fill in the following fields on the form.

Template form

Field	Description
Name	Name of the template.
Table	Set the value to `Schedule Content [sn_cd_content_visibility]`.
Short description	Short description of the template.

4. From the **Template** field, add the **Content** field.
5. For the **Content** field, select a content record to use with the template.
6. Add additional fields with corresponding values, as needed.

   Depending on the content type, you must add additional fields with corresponding values. Content is one of the following types.

   - Mobile content
   - Portal content
   - Notification content
   - To-do content

   For a list of the available fields for each content type, see Schedule content.
7. Click **Submit** or **Update**.

What to do next

Use the schedule content template to deliver content as part of a lifecycle event. See Configure a lifecycle event activity for content for more information.

Configure a lifecycle event

Build a lifecycle event and its associated activity sets and activities with the lifecycle event builder.

Before you begin

Role required: sn_hr_le.admin or sn_hr_le.activity_set_manager

Begin by defining the event type, such as new hire onboarding. Each lifecycle event has one or more activity sets, which represent different stages in the lifecycle event process. And each activity set has one or more activities, which can be requests for approvals, tasks for employees, activities for fulfillers, or the sending of notifications.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

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Manage Lifecycle Event form

Field	Description	
Title	Name of the lifecycle event.	
Active	Option to activate the lifecycle event for use.	
Description	Description of the lifecycle event.	
Display activity sets to subject person	(Employee Center only) Option to show the activity sets timeline on the HR ticket page to the subject person of the lifecycle event case. This is a two-part process. In addition to selecting the box here, you must also select **Show case to subject person** for the HR service that the lifecycle event is associated with. To select the latter, see Configure an HR service. **Note:** ○ If **Show case to subject person** for the corresponding HR service is not selected, then the activity sets timeline will not display for the subject person. ○ The progress bar for each activity set does not appear for the subject person. It only appears for the opened for person. ○ The HR ticket page is where users can view the details of an HR case in the Employee Service Center. See for more information.	
In the employee view, sort activities by	You can choose how your employees view activities in the lifecycle event. ○ Due date: Show activities in chronological order with tasks that are due earlier at the top and other activities in by creation date. ○ Display order: Show activities in the order they appear in an activity set. **Note:** What you select in this field is also reflected on the Employee Center for a user's to-dos.	
Event type	Event type of the lifecycle event. Select one of the following:	
	Onboarding	Lifecycle event to use with mobile onboarding. **Note:** You must also make sure that the **Display activity sets to subject person** option on the lifecycle event form and the **Show case to subject person** option on the corresponding HR service form are selected. See Select a Lifecycle Event for Now Mobile for more information.
	Offboarding	
	Transitions	

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Field	Description	
	HR Services	

4. Click the **Activity Sets** tab or **Next** to configure the activity sets and activities for the lifecycle event.

   You can create new or modify existing activity sets and activities. For further details on the form fields, see:

   - Configure a lifecycle event activity set
   - Configure a lifecycle event activity

5. Click **Submit** or **Update**.

Configure a lifecycle event activity set

Create or modify a lifecycle event activity set to define a container for a group of activities.

Before you begin

Role required: sn_hr_le.admin or sn_hr_le.activity_set_manager

Activity sets represent different stages in the lifecycle event process, and you must define when the activity set is triggered, such as immediately upon creation of the lifecycle event case or after the completion of another activity set. Each activity set is associated with a single lifecycle event.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**, and open a record.
2. Click the **Activity Sets** tab to access the lifecycle event builder.
3. Create a new or modify an existing activity set.
   - To create a new activity set, click **New Activity Set**.
   - To modify an existing activity set, hover over the activity set and click **Edit Activity Set**.
4. Fill in the fields on the form.

Activity Set form

Field	Description
Title	Name of the lifecycle event activity set.
Display title	Display title of the activity set. The display title is employee-facing only, and appears on the activity sets timeline on the HR ticket page in both portal and mobile. For example, an employee-facing title for the preboarding activity set could be "Get ready for day one." If no display title is provided, the default activity set name will be used instead.
Description	Description of the lifecycle event activity set.
Active	Option to activate the lifecycle event activity set for use.
Display order	Order number for when the activity set appears in the lifecycle event builder and in the activity sets timeline on the HR ticket page.

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Field	Description
	Note: ○ The order number has no relation to when the activity set is triggered. ○ If no order number is provided, then the activity set will appear after all of the numbered activity sets. ○ The HR ticket page is where users can view the details of an HR case in the Employee Service Center. See for more information.
Display to opened for	Option to show or hide the activity set to the opened for person of the lifecycle event case. If selected, the activity set will appear in the activity sets timeline on the HR ticket page in both portal and mobile. **Note:** If not selected, the activity set will not appear in the activity sets timeline. Any associated to-dos assigned to the opened for and subject person will still appear on the HR ticket page. However, to-dos that are assigned to anyone else will be hidden.
Display to subject person	Option to show or hide the activity set to the subject person of the lifecycle event case. If selected, the activity set will appear in the activity sets timeline on the HR ticket page in both portal and mobile. This is a three-part process. In addition to selecting the check box here, you must also: ○ Select **Display activity sets to the subject person** for the lifecycle event type. See Configure a lifecycle event for more information. ○ Select **Show case to subject person** for the HR service that the lifecycle event is associated with. See Configure an HR service for more information. **Note:** If not selected, the activity set will not appear in the activity sets timeline. Any associated to-dos assigned to the subject person will still appear on the HR ticket page. However, to-dos that are not assigned to the subject person will be hidden.
Audience	The specific audience the activity set targets. Setting an audience for an activity set allows you to create activities within an activity set for a specific group of people. If the audience field is empty, the activity set applies to all employees. You can also use audience as a filter when using the Test Activity Sets tool. For more information, see Using the Test Activity Sets tool for a lifecycle event activity set. **Note:** You can also define an audience at the activity level. The audience criteria for an activity set overrides the audience criteria for an activity.

5. In the **Activity Set Trigger Condition** section, set the trigger condition for the activity set.

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Trigger condition options

Trigger condition	Description	
Immediate	Activity set triggers upon creation of the lifecycle event case.	
Date	Activity set triggers before, on, or after the specified date. **Note:** If the date for the activity set is updated, then the change will apply only to open HR cases with active activity sets that have not yet triggered.	
	Trigger table	Select an HR case or profile table.
	Trigger field	Select a date field.
	Ignore empty date	Option to not trigger the activity set when the date field is empty. If selected, the activity set will not trigger when the date field does not have a value.
	Date offset type	Select the date offset type: ○ None ○ Before ○ After
	Date offset quantity	Provide an offset quantity. This field is available when **Before** or **After** is selected from **Date offset type**.
	Date offset units	Provide a unit of measure of days, weeks, or months. This field is available when **Before** or **After** is selected from **Date offset type**.
Other Activity Sets	Activity set triggers after the completion of one or more activity sets.	
	Activity set dependencies	Select one or more activity sets that must complete before the activity set triggers.
Advanced	Activity set triggers per the provided script.	
	Trigger script	Provide a custom script to determine when the activity set triggers. There are two variables in the scripts: ○ parentCase: Reference to parent lifecycle event case. ○ hrTriggerUtil: Allows checking of other activity sets or dates from other types of triggers. The Activity Set Launcher workflow runs every four hours to verify these conditions. See Lifecycle Events workflows.
Condition	Activity set triggers per the specified conditions.	

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Trigger condition	Description	
	Note: When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.	
	Condition table	Select an HR case or HR profile table.
	Condition	Use the condition builder to define the conditions that must be met for the activity set to trigger.
Combination	Activity set triggers based on a combination of a specified date, other activity sets, and/or conditions.	
	Combination type	Select when the activity set triggers: ○ And: Activity set triggers only when all of the specified triggers are met. ○ Or: Activity set triggers when any of the specified triggers are met.
	Date	You can specify a date as part of the combination trigger type.
	Other Activity Sets	You can select one or more activity sets that must complete as part of the combination trigger type.
	Condition	You can use the condition builder to define the conditions that must be met as part of the combination trigger type.

6. Click **Submit** or **Update**.

Example: Advanced trigger script

- Trigger type = advanced.
- The new hire (Subject Person) has an assigned manager.
- The start date for the new hire has been reached (cannot be empty).
- Two specific activity sets have completed.

```
(function shouldActivitySetTrigger(parentCase /* GlideRecord for
 parent case */,
        hrTriggerUtil /* hr_TriggerUtil script include instance
 */) {

 //Check that employee has a manager
 var employeelocationType = parentCase.subject_person.manager;
 if (gs.nil(employeeLocationType))
  return false;

 //Check that the employees start date is populated and on or
 before today
 var employeeStartDate =
 parentCase.subject_person_hr_profile.employment_start_date;
```

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```
 if (gs.nil(employeeStartDate)
 || !
hrTriggerUtil.checkForElapsedDate(employeeStartDate.getDisplayVa
lue()))
  return false;

 //Check Previous Sets have finished
 var prerequisiteActivitySetIds =
 ['20f71984ecb61300964fb378c827556f',
 '58123661dbf2930085ea54c0cf9619ba'];
 if
 (!
hrTriggerUtil.checkActivitySetsCompleted(prerequisiteActivitySet
Ids))
  return false;

 return true;

})(parentCase, hrTriggerUtil);
```

Replace the sys_ids in the example with your activity set sys_ids. From your activity set, click the **Form Context Menu** icon and select **Copy sys_id**.

Lifecycle Events evaluation interval

There is a mechanism available to ensure timers within a workflow trigger automatically rather than wait for the evaluation interval to trigger.

Activity sets can be triggered using different methods based on how you configure it:

- Immediately
- By a date
- Trigger script (advanced)
- Conditions (fields from a table)
- Combination or different trigger types
- *Other activity sets

> **Note:** For more information on activity set triggering, see Configure a lifecycle event activity set and Lifecycle Events workflows.

*When an activity set is triggered by other activity sets it must wait for all dependencies to resolve before triggering.

HR Activity launcher flow

When a lifecycle event case is changed to the Ready state, all activity sets run through the HR Activity Launcher flow. The activities in each activity set are not triggered at this time. When an activity set is not dependent on other activity sets to trigger activities, the trigger conditions are analyzed.

If the trigger condition has not been met, it waits for the Wait to reevaluate Trigger Script timer to run (default is every four hours).

If the trigger condition is met, but after the evaluation interval runs, it has to wait another four hours before the activities set is re-evaluated. This can cause delays in an activity set to trigger.

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The Wait to reevaluate Trigger Script timer uses the **sn_hr_le.All activity set closure timer** field under Lifecycle Event Properties to determine when to evaluate the activity set. The default value is four hours.

You can reduce the value in the **sn_hr_le.All activity set closure timer** field in order to launch the activity set sooner.

Note: Use caution if you decide to change the default value. Frequent updates trigger more events and can cause your lifecycle event activity sets to cancel before it can complete. For more information, see Lifecycle event properties.

Condition with Event BR (Demo) activity set

An alternative to using the **Evaluation interval** field is to use the **Condition with Event BR (Demo)** activity set that is included with demo data as an example of what you can use. This is an optional solution, but you can create and use server-side code (business rule, event script, scheduled job, etc.) that triggers the check_activity_set_trigger event into the HR Activity Set Trigger Check workflow. Any activity set can be triggered using the check_activity_set_trigger event from the server side with the exception of activity sets that are triggered immediately or only by other activity sets.

Note: To access the **Condition with Event BR (Demo)** activity set, activate the Human Resources Scoped App: Lifecycle Events for Enterprise (com.sn_hr_lifecycle_ent) plugin. This is an optional method that can be used instead of the values in the **Evaluation interval** field.

- The trigger type for the activity set must be set to **Condition**.
- The **Condition with Event BR (Demo)** activity set triggers when the state of primary lifecycle event case moves to **Work in progress**.
- The **Email - Condition with Event BR (Demo)** activity is included with the **Condition with Event BR (Demo)** activity set.
- The **Condition with Event BR (Demo)** activity set contains the **HR Activity Launcher** workflow. It also contains the **Condition with Event BR (Demo)** business rule.
  - The **Condition with Event BR (Demo)** business rule runs after the state of an LE case changes to **Work in Progress**.
  - It then looks for the workflows that are running for the LE case until it finds the HR Activity Set Trigger Check workflow and broadcasts the check_activity_set_trigger event to that workflow.
- You can modify the **Condition with Event BR (Demo)** activity set, **Email - Condition with Event BR (Demo)** activity, and **Condition with Event BR (Demo)** business rule to fit your requirements.

Note: For more information, see Lifecycle Events workflows and Business rules.

HR Activity Set Trigger Check workflow

The HR Activity Set Trigger Check workflow (see below) was added to the HR Activity Launcher workflow so that any server-side script can notify the workflow to see if the activity set is ready to trigger.

Note: It does not trigger the activity, it evaluates the condition of the activity set.

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- The HR Activity Set Trigger Check workflow is called when an activity set is not dependent on other activity sets.
- It periodically checks if the trigger condition for an activity set has been met.
- If the trigger conditions have not been met, it still waits for the evaluation interval to run.
- If the check_activity_set_trigger event fires, the Activity set trigger conditions are checked immediately.

View and use the Condition with Event BR (Demo) activity set

You can trigger activity sets using an event that is included in the Condition with Event BR (Demo) activity set or you can create and use server-side code (business rule, event script, scheduled job, etc.) that triggers the check_activity_set_trigger event into the HR Activity Set Trigger Check workflow.

Before you begin

Role required: admin

Note: To access the **Condition with Event BR (Demo)** activity set, activate the Human Resources Scoped App: Lifecycle Events for Enterprise (com.sn_hr_lifecycle_ent) plugin. This is an optional method that can be used instead of the values in the **Evaluation interval** field.

Procedure

1. Navigate to **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.
2. Select the **New Hire Onboarding (Demo)** lifecycle event.
3. Select the **Activity Sets** tab.
4. Scroll to the right and select the **Condition with Event BR (Demo)** activity set.

   Note: The **Condition with Event BR (Demo)** activity set is an example of what you can use. This is an optional solution, but you can create and use server-side code (business rule, event script, scheduled job, etc.) that triggers the check_activity_set_trigger event into the HR Activity Set Trigger Check workflow.

5. Select the edit ( ) in the **Condition with Event BR (Demo)** activity set.
   - The **Trigger type** is **Condition**.
   - When the **State** of the LE/HR case changes to **Work in Progress**, the **Condition with Event BR (Demo)** activity set triggers and sends a email.

View and use the Condition with Event BR (Demo) business rule

You can view and use the Condition with Event BR (Demo) business rule to trigger an evaluation of your activity set faster.

Before you begin

To evaluate the trigger conditions for an activity set via the Condition with Event BR (Demo) business rule, the **Trigger type** field in the corresponding Activity Set record must be set to **Condition**.

Role required: admin

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Procedure

1. Navigate to **Lifecycle Events** > **Lifecycle Events Cases**.
2. Select a case that was created from the New Hire Onboarding (Demo) lifecycle event.
3. Select the Additional actions ( ) icon.
4. Select **Configure** and then **Business Rules**.
5. Search and select **Condition with Event BR (Demo)**.

   Note: The **Condition with Event BR (Demo)** business rule runs after the State changes to Work in Progress.

6. Select the **Advanced** tab.
   In the Script field, you can view how this business rule works. It looks for the running flows for the LE/HR case. When it finds the HR Activity Set Trigger Check workflow, it broadcasts the check_activity_set_trigger event to the flow. This is what triggers the evaluation of an activity set faster rather than wait for the value (default is four hours) in the **Evaluation interval** field.
7. When you change the state of the LE/HR case to **Work in Progress**, the activity set triggers.
8. Return to the LE/HR case and select the **Show Workflow** related link.
9. Select the **HR Activity Set Trigger Check** tab.
   The Timer was cancelled when the LE/HR case state was changed to **Work in Progress** and the **check_activity_set_trigger** event was fired.

Change the evaluation interval default wait time

As an administrator, you can change the default time that an activity set waits before the activity set is evaluated.

Before you begin
Role required: admin

About this task
Starting in the Utah family, the default evaluation interval can be changed.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Manage Lifecycle Events**.
2. Select a lifecycle event.
3. Select the **Activity Sets** tab.
4. Select the edit icon for an **Activity Set**.

   Note: In Journeys, stages are equivalent to activity sets.

5. Select **Configure** > **All** from the **Additional actions** list.
6. Select the **Dictionary Entries** tab.
7. Find **evaluation_interval Column name**.
8. Open the related **Dictionary Entry**.

   Note: To edit this record, you must be in the Human Resources: Lifecycle Enterprise application.

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9. Select the **Default Value** tab.
   Default value format `0 04:00:00` is equal to `d hh:mm:ss`:
   - Days = d
   - Hours = hh
   - Minutes = mm
   - Seconds = ss
10. Change the **Default value**.
11. Select **Update**.

Configure a Lifecycle Events trigger for activity sets

Create triggers for activity sets in Lifecycle Events.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Manage Lifecycle Events**.
2. Select the lifecycle event you want to change.
3. Select the **Activity Sets** tab.
4. Select the **Edit Activity Set** icon for the activity set to add the trigger to.
5. Select a **Trigger type**.
   For information about the trigger types, see Lifecycle Events activity set trigger types.
6. Select **Update**.

Lifecycle Events activity set trigger types

Administrators can configure activity set triggers to make activities in an activity set available.

Activity set trigger types

Immediate

Triggers all the activities in a set as soon as the lifecycle event is created.

Date

Triggers activities in an activity set when a date or milestone. The first day for a new hire onboarding activity could be the new hire's first day at work. Date triggers require a **Trigger table** and a **Trigger field**.

Fields associated with Date field

Field	Description
Trigger table	Select a table from the available list.
Trigger field	Select a field from the available list.
Ignore empty date	If there is no date in the trigger field, the activity set won't trigger.

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Fields associated with Date field (continued)

Field	Description
Date offset type	• After • Before
Date offset quantity	The number of offset units to be evaluated.
Date offset units	• Days • Weeks • Months

Other activity sets

The activity set is triggered when another activity set is complete. When an activity set is triggered by other activity sets, the trigger isn't activated until all dependent activities in the set are complete.

Advanced

Use the **Advanced** trigger to add a script that evaluates custom conditions to trigger the activity set.

Condition

Use the **Condition** trigger to define conditions based on the value of fields in a selected table.

Combination

Combines the use for **Date**, **Other Activity Sets**, and **Condition**. All three conditions must be met to trigger the activity set.

Lifecycle Events activity set progress optimization

Ensure that the activity sets you have defined for Lifecycle Events progress seamlessly through completion when they meet the conditions to be triggered for a Lifecycle Events case.

Activity sets are created or modified to define a group of activities. Activity sets represent different stages in the life cycle event process and have conditions under which they're triggered. The trigger conditions for an activity set depend on the values defined in the **Trigger type** and **Audience** fields in the Activity Set record. When an activity set is created, the **State** field in the corresponding Activity Set Context record is set to **Awaiting Trigger**. Once an activity set meets the trigger conditions that are defined for it, the value in the **State** field is changed to **Running Activities**.

Occasionally, issues that impede progress for activity sets may surface although the corresponding trigger conditions have been met. To optimize progression for the activity sets you have defined and that are active, it's important to understand the conditions under which an activity set becomes stagnant. Use the following table to acquire information about the issues attributed to the stagnation of an activity set's progress and the corresponding solutions for the issues reflected:

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Activity set stagnation issues and corresponding solutions

Issue	Description	Solution
Configuration changes	Activity set configuration changes performed while you have existing Lifecycle Events cases that are dependent on a previous activity set configuration.	You must use caution when changing the configuration of an activity set that is defined and active, specifically the following components: • Changing the **Audience** field value in the Activity Set record. • Changing the **Trigger type** field value in the Activity Set record. • Adding new activities to an activity set. • Moving activities between activity sets. Existing Lifecycle Events cases don't use the configuration changes you made to an activity set when any of the following conditions are true: • The activity set has triggered for the Lifecycle Events case. • Activities have already generated for the Lifecycle Events case. • Activities have already completed for the Lifecycle Events case. These configuration changes should be performed in a non-production instance to validate whether the changes produce any adverse effects.

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Activity set stagnation issues and corresponding solutions (continued)

Issue	Description	Solution
		Tip: If an activity set becomes stagnant due to a configuration change, you can perform the following steps to resume progress: 1. Change the **State** field in the Activity Set Context record to **Error**. 2. Resume the corresponding Lifecycle Events case. This solution is a workaround and doesn't exemplify the use for which the resume case functionality is intended. To use this workaround, the following conditions must be true: • The activities associated with the activity set must not have been completed. • The tasks associated with the Lifecycle Events case must not have been created. This workaround should be performed in a non-production instance to validate whether the changes produce the desired effects.
Misconfiguration	An erroneous activity set configuration that causes unintended behavior and adversely affects the progression of activities within an activity set.	Review the activity sets you have defined to confirm whether they're correctly configured. For example, you defined a new activity set, activity set 2 (AS2), and set the **Trigger type** field to **Other Activity Sets** so that AS2 is triggered after the completion of activity set 1 (AS1). However, if AS1 is deactivated, your

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Activity set stagnation issues and corresponding solutions (continued)

Issue	Description	Solution
		configuration for AS2 becomes invalid. Since AS1 is deactivated,the configuration for AS2 must be changed to remove its dependency from AS1.
Customization	Issues associated with custom Lifecycle Events workflows or their related script includes that are used to manage and run activities.	Confirm whether there are any restricted caller access (RCA) records that have become invalidated from modifying a script include. If there are invalid RCA records related to a modified script include, review each record and allow access accordingly. Also, confirm whether there are any RCA records with an error regarding the inability to call or access a script include, like hr_ActivitySet.
Evaluation interval	Reducing the interval of time that must transpire between each cycle of the activity set evaluation process. The activity set evaluation process determines whether activity sets with the **State** field set to **Awaiting Trigger** in the corresponding Activity Set Context record meet the trigger conditions that are defined for them.	Use caution if you decide to reduce the time interval between each cycle of the activity set evaluation process to less than the default value (four hours). Reducing the wait time between each cycle of the activity set evaluation process increases the frequency at which the activity set evaluation process runs. Consequently, this modification increases the number of workflow activities that run simultaneously. If the number of activities running reaches the capacity of activities that can be processed by the workflow, the workflow is canceled during its next attempt to run. Review the Workflow contexts table to confirm whether there are any records associated with a Lifecycle Events workflow that have been canceled. The **State** field in

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Activity set stagnation issues and corresponding solutions (continued)

Issue	Description	Solution
		the corresponding Workflow context record is set to **Canceled** for workflows that have been canceled. **Tip:** Use the Condition with Event BR (Demo) activity set in lieu of modifying the evaluation interval. See Lifecycle Events evaluation interval for more information about the evaluation interval and the Condition with Event BR (Demo) activity set.
Audience criteria	The subject person doesn't meet the audience criteria defined for an activity that is intended for a target audience. The corresponding activity set is skipped during the evaluation process.	Review the Activity Set Contexts table to confirm whether there are any records that have been skipped. The **State** field in the corresponding Activity Set Context record is set to **Skipped** for activity sets that have been skipped.

Lifecycle Events triggers and workflow reference

Information about Lifecycle Events triggers and workflow.

HR Activity launcher flow

When a lifecycle event case is changed to the Ready state, all activity sets run through the HR Activity Launcher flow. The activities in each activity set aren't triggered. When an activity set isn't dependent on other activity sets to trigger activities, the trigger conditions are analyzed.

If the trigger condition hasn't been met, it waits for the Wait to reevaluate the Trigger Script timer to run (default is every four hours).

If the trigger condition is met, but after the evaluation interval runs, it has to wait another four hours before the activities set is reevaluated. Waiting for reevaluation can cause delays in an activity set to trigger.

The Wait to reevaluate Trigger Script timer uses the **evaluation_interval** in the **sn_hr_le_activity_set** table. The default value is four hours. You can reduce the value in the **evaluation_interval** field to launch the activity set sooner, see Change the evaluation interval default wait time.

Note: Use caution if you decide to change the default value. Frequent updates trigger more events and can cause your lifecycle event activity sets to cancel before it can complete. For more information, see Lifecycle event properties.

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Condition with Event BR (Demo) activity set

An alternative to using the **Evaluation interval** field to trigger an activity set is to use the **Condition with Event BR (Demo)** activity set that is included with the demo data as an example of what you can use. Using the **Condition with Event BR (Demo)** is an optional solution, but you can create and use server-side code (business rule, event script, scheduled job, and the like) that triggers the check_activity_set_trigger event into the HR Activity Set Trigger Check workflow. Any activity set can be triggered using the check_activity_set_trigger event from the server side except for activity sets that are triggered immediately or only by other activity sets.

Note: To access the **Condition with Event BR (Demo)** activity set, activate the Human Resources Scoped App: Lifecycle Events for Enterprise (com.sn_hr_lifecycle_ent) plugin. This is an optional method that can be used instead of the values in the **Evaluation interval** field.

- The trigger type for the activity set must be set to **Condition**.
- The **Condition with Event BR (Demo)** activity set triggers when the state of primary lifecycle event case moves to **Work in progress**.
- The **Email - Condition with Event BR (Demo)** activity is included with the **Condition with Event BR (Demo)** activity set.
- The **Condition with Event BR (Demo)** activity set includes the **HR Activity Launcher** workflow. It also includes the **Condition with Event BR (Demo)** business rule.
  - The **Condition with Event BR (Demo)** business rule runs after the state of an LE case changes to **Work in Progress**.
  - It then looks for the workflows that are running for the LE case until it finds the HR Activity Set Trigger Check workflow and broadcasts the check_activity_set_trigger event to that workflow.
- You can change the **Condition with Event BR (Demo)** activity set, **Email - Condition with Event BR (Demo)** activity, and **Condition with Event BR (Demo)** business rule to fit your requirements.

Note: For more information, see Lifecycle Events workflows and Business rules.

HR Activity Set Trigger Check workflow

The HR Activity Set Trigger Check workflow was added to the HR Activity Launcher workflow so that any server-side script can notify the workflow to see if the activity set is ready to trigger. The HR Activity Set Trigger Check workflow evaluates conditions. It doesn't directly trigger any workflows.

- The HR Activity Set Trigger Check workflow is called when an activity set isn't dependent on other activity sets.
- It regularly checks if the trigger condition for an activity set has been met.
- If the trigger conditions haven't been met, it still waits for the evaluation interval to run.
- If the check_activity_set_trigger event fires, the Activity set trigger conditions are checked immediately.

Check activity set trigger workflow event

Use the **check_activity_set_trigger** workflow event in a server-side script (business rule, event script, scheduled job, and the like) to shortcut the Wait to reevaluate the Trigger Script timer and evaluate an activity set's trigger just-in-time. If you're considering using a more frequent Evaluation interval to avoid a long timer wait, use this option instead.

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Note: The **check_activity_set_trigger** event doesn't work with activity sets that are triggered immediately or triggered only by other activity sets.

When preparing to use the **check_activity_set_trigger** workflow event, first determine when the activity set's trigger criteria could be checked. For example, if using a "Condition" trigger type, a business rule with the same condition may be a good place to check if the condition is true. If using an "Advanced" trigger, determine what server-side business logic caused the Advanced script to return true. For example:

- script include
- scheduled job
- import script

.

After you've determined the server-side location to check the trigger criteria, add the following script to it:

```
(function executeRule(current, previous /*null when async*/) {
 var wf = new global.Workflow().getRunningFlows(current);
 while (wf.next()) {
  if (wf.getValue('name') !== 'HR Activity Set Trigger Check')
   continue;
  new global.Workflow().broadcastEvent(wf.sys_id,
 'check_activity_set_trigger');
 }
})(current, previous);
```

Configure a lifecycle event activity

Create or modify a lifecycle event activity. Lifecycle Events activities can be approvals, employee tasks, fulfiller activities, notifications, flows, content, or activity containers.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

Each activity must be associated with an owning group. If the activity has a targeted audience, you can use audience records to define the conditions or criteria that the subject person of a lifecycle event case must meet for the activity to trigger on their behalf. Each activity is associated with a single activity set.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**, and open a record.
2. Click the **Activity Sets** tab to access the lifecycle event builder.
3. Create a new or modify an existing activity.
   - To create a new activity, click **Add Activity**.
   - To modify an existing activity, hover over the activity and click **Edit Activity**.

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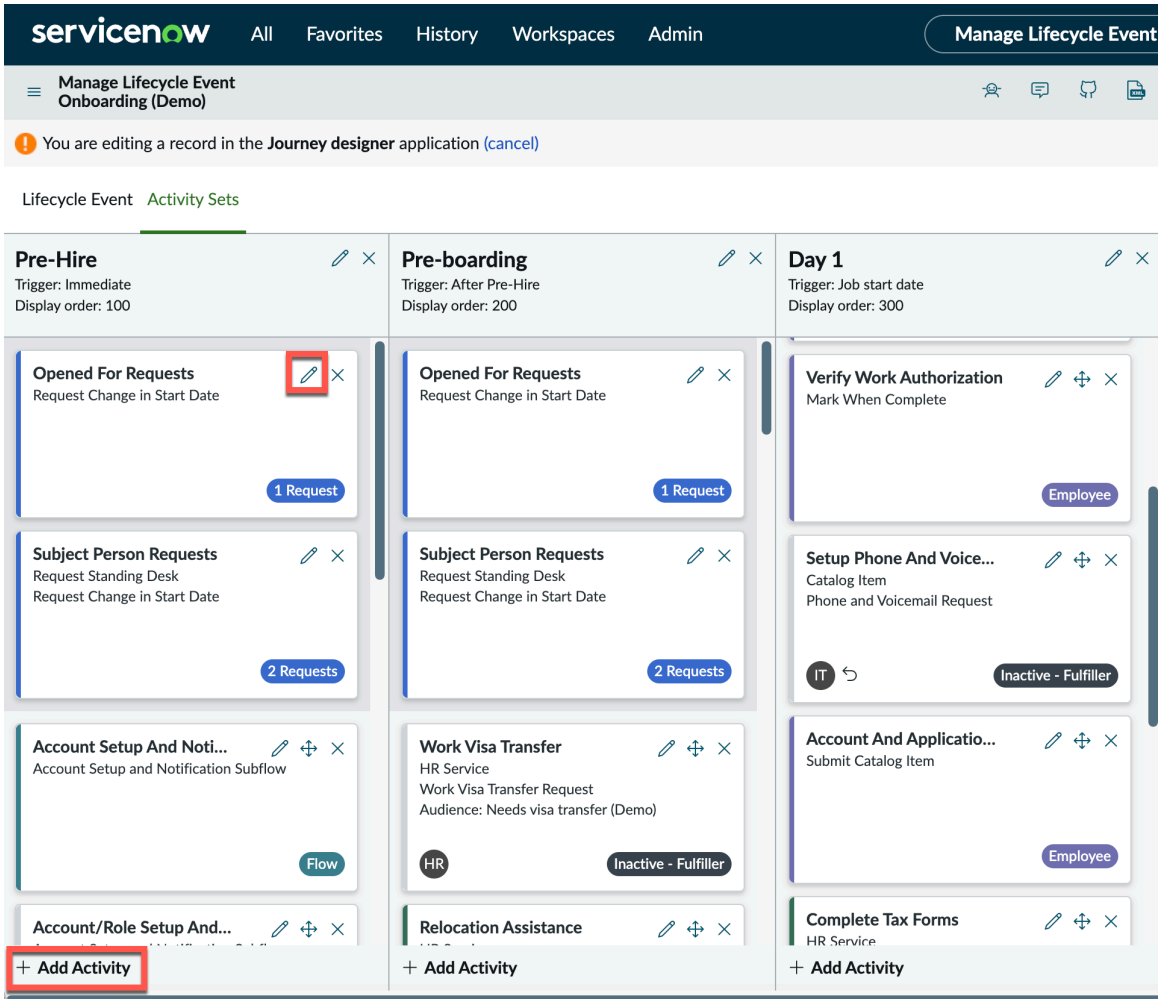

4. On the Activity form, set the **Activity type** field to one of the following:
   - Approval
   - Employee task
   - Fulfiller activity
   - Notification
   - Flow
   - Content
   - Activity container
   - Pulse survey

   For each activity type, follow the applicable task.

> **Warning:** An LE activity (fulfiller activity) for an HR service that has the same LE type as the LE case can cause a loop that could cause a memory issue.

For an approval

Configure a lifecycle event activity that is an approval. Approvals create a to-do for the specified approvers to approve or reject.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

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Procedure

1. On the Activity form, set the **Activity type** field to `Approval`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Activity type	Set the value to `Approval`.
Active	Option to activate the activity for use.
Owning group	Owning group that the activity is associated with. **Note:** ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Activity set	Activity set that the activity is associated with.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind. **Note:** Audience records define the conditions or criteria that a user must meet.

3. In the **Approvers** related list, define the approvers for the lifecycle event activity.

Approvers related list fields

Field	Description
Approver groups	Groups to approve the activity.
Approver users	Users to approve the activity.
Approvers from case	User from the lifecycle event case to approve the activity.

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4. In the **Approval Options** related list, set how the activity is approved.

Approval Options related list fields

Field	Description	
Wait for	Select one of the following actions for when an approval is completed:	
	Anyone to approve	Only one person is required to approve the HR activity.
	Everyone to approve	Everyone assigned to the HR activity is required to approve it. If one person rejects, the Assigned to person receives a message with a link to select a substitute approver.
	First response from anyone	The first person to respond (approve or reject) to the activity determines the state.
On rejection	Select one of the following actions for when an approval is rejected:	
	Allow resubmit of approvals:	An HR agent can resubmit for approval. The Assigned to person receives a message on the case with a link to resubmit approval requests. All approvers are resubmitted the approval request.
	Close incomplete	When the HR service is rejected, change the **State** of the case or task to **Closed and Incomplete**.
Missing any approver	Select one of the following actions for when any approver is missing:	
	Select replacements	When an approver is missing, the Assigned to person can select a replacement. If the activity is configured to have the Opened for Manager to approve, but the Opened for person has no manager assigned, the activity has a missing approver. If **Select replacements** is selected in the **Missing any approver** field, the Assigned to person receives a message with a link to select a substitute approver.
	Skip missing	Bypass any missing approver and continue.
	Close incomplete	Change the state of the case or task to **Closed Incomplete** when there is a missing approver.
Missing all approvers	Select one of the following actions for when all approvers are missing:	
	Select replacements	When all approvers are missing, the Assigned to person can select replacements. If the activity is configured to have the Opened for Manager to approve, but the Opened for person has no manager assigned, the activity has a missing approver. If **Select replacements** is selected in the **Missing any approver** field, the Assigned to person

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Field	Description	
		receives a message with a link to select a substitute approver.
	Close incomplete	Change the state of the case or task to **Closed and Incomplete** when all approvers are missing.

5. Click **Submit** or **Update**.

For an employee task

Configure a lifecycle event activity that is a task for an employee. Employee tasks are assigned to the subject person of the lifecycle event case.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

Procedure

1. On the Activity form, set the **Activity type** field to `Employee`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Activity type	Set the value to `Employee`.
HR task template	HR task template to use with the activity. **Note:** An HR task template automatically populates fields on the HR task form when the task is generated. See Configure an HR task template for more information.
Wait for generated task to complete	Option to wait for the generated task to complete before the activity closes. This field appears when you select one of the following task types in the HR task template form. If selected: ○ **HR Service**: Completion of the HR task results in the creation of an HR case. The HR case must complete in order for the activity to close. ○ **Submit Catalog Item**: Completion of the HR task results in the creation of a request. The request must complete in order for the activity to close. ○ **Submit Order Guide**: Completion of the HR task results in the creation of an IT request. The IT request must complete in order for the activity to close.

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Field	Description
	Note: ○ The condition for closure depends on the activity type, and can be modified. ○ If selected, the change applies only to new lifecycle event cases. Activities in existing cases will not wait for the generated task to complete before the activity closes.
Active	Option to activate the activity for use.
Owning group	Owning group that the activity is associated with. **Note:** ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Activity set	Activity set that the activity is associated with.
Use badge from HR service configuration	(If for the associated HR task template, the **HR task type** value is **HR service**) Option to use the badge that is associated with the parent HR service.
Badge	Badge that the fulfiller activity type is associated with. **Note:** Badges display on the portal to indicate to the employee which department is fulfilling that activity. See Configure an HR badge for more information.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind. **Note:** Audience records define the conditions or criteria that a user must meet.

3. Click **Save**.
4. In the associated HR task template, when the **HR task type** value is **HR service**, **Submit catalog item**, or **Submit order guide**, in the **Activity Field Mappings** section, you can map

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fields from the parent lifecycle event case to the appropriate variables on the child activity that is generated when the employee activity is triggered.

a. Click **New** or open a record.

b. Fill in the fields on the form.

Activity Field Mapping form

Field	Description	
Activity	This field is automatically set to the name of the associated lifecycle event activity.	
Map from table	Source table that the activity field is mapped from. This field is automatically set to the name of the HR case table that the parent lifecycle event case is associated with.	
Map from	Map from type. Select one of the following:	
	Field	Map from a field. In the **Map from field** field, select the field in the source table that the activity field is mapped from. **Note:** Make sure that the data type of the field being mapped from is the same as the data type of the field being mapped to.
	Custom text	Map from custom text. In the **Custom Text** field, provide a string value. Custom text can be static or include variables that are pulled from the source table. For example, you can provide a short description for an IT request, such as, "Provide laptop for new hire: ${subject_person}."
Map to variable	Variable that the activity field is mapped to. **Note:** Make sure that the data type of the field being mapped from is the same as the data type of the field being mapped to.	

c. Click **Submit** or **Update**.

d. Repeat the process as needed.

5. Click **Update**.

For a fulfiller activity

Configure a lifecycle event activity that is for a fulfiller. Fulfiller activities are assigned to an agent or fulfiller in a department such as HR, IT, or Facilities.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

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Procedure

1. On the Activity form, set the **Activity type** field to `Fulfiller`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description	
Title	Name of the lifecycle event activity.	
Description	Description of the lifecycle event activity.	
Activity type	Set the value to `Fulfiller`.	
Fulfiller activity	Select one of the following fulfiller activity types: **Note:** You can control the different fulfiller activity types that appear here. See Configure an activity configuration for a lifecycle event for more information.	
	Automated Order Guide	(Lifecycle Events for Enterprise only) An order guide fulfills the activity. In the **Order guide** field, select the order guide to use. **Note:** An order guide submits a single service catalog request that generates several items. See Order guides for more information.
	Catalog Item	(Lifecycle Events for Enterprise only) A catalog item fulfills the activity. In the **Catalog item** field, select the catalog item to use. **Note:** A catalog item is a good or service. See Service catalog items for more information.
	Flow	A flow fulfills the activity. In the **Flow** field, select the flow to use. **Note:** A flow automates a process with a sequence of reusable actions. See Flow designer for more information.
	HR Service	An HR service fulfills the activity. In the **HR service** field, select the HR service to use. **Note:** HR services are the requests and assistance an HR organization provides its employees. See HR services for more information.
	HR Task	An HR task fulfills the activity. In the **HR task template** field, select the HR task template to use.

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Field	Description	
		Note: An HR task template automatically populates fields on the HR task form when the task is generated. See Configure an HR task template for more information.
	Incident	(Lifecycle Events for Enterprise only) An incident fulfills the activity. In the **Template** field, select the incident template to use. **Note:** An incident template automatically populates fields on the Incident form. See Incident Management for more information.
Active	Option to activate the activity for use.	
Use badge from HR service configuration	(If for the associated HR task template, the **HR task type** value is **HR service**) Option to use the badge that is associated with the parent HR service.	
Badge	Badge that the fulfiller activity type is associated with. **Note:** Badges display on the portal to indicate to the employee which department is fulfilling that activity. See Configure an HR badge for more information.	
Owning group	Owning group that the activity is associated with. **Note:** ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.	
Activity set	Activity set that the activity is associated with.	
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind.	

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Field	Description
	Note: Audience records define the conditions or criteria that a user must meet.

3. Click **Save**.
4. In the **Activity Field Mappings** section, you can map fields from the parent lifecycle event case to the appropriate fields on the child activity that is generated when the fulfiller activity is triggered.

   Note: This section inherits any mappings from the associated fulfiller activity type. You can use the default fulfiller activity type mappings as-is or further modify them.

   a. Click **New** or open a record.

   b. Fill in the fields on the form.

Activity Field Mapping form

Field	Description	
Activity	This field is automatically set to the name of the associated lifecycle event activity.	
Map from table	Source table that the activity field is mapped from. This field is automatically set to the name of the HR case table that the parent lifecycle event case is associated with.	
Map from	Map from type. Select one of the following:	
	Field	Map from a field. In the **Map from field** field, select the field in the source table that the activity field is mapped from. **Note:** Make sure that the data type of the field being mapped from is the same as the data type of the field being mapped to.
	Custom text	Map from custom text. In the **Custom Text** field, provide a string value. Custom text can be static or include variables that are pulled from the source table. For example, you can provide a short description for an IT request, such as, "Provide laptop for new hire: ${subject_person}."
Map to table	Target table that the activity field is mapped to. This field is automatically set to the name of the table that the child activity is associated with.	
Map to field	Field in the target table that the activity field is mapped to.	

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Field	Description
	Note: Make sure that the data type of the field being mapped from is the same as the data type of the field being mapped to.

c. Click **Submit** or **Update**.

d. Repeat the process as needed.

5. Click **Update**.

For a notification

Configure a lifecycle event activity that is a notification. Notifications automate the sending of an email to the specified recipients.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

Procedure

1. On the Activity form, set the **Activity type** field to `Notification`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Activity type	Set the value to `Notification`.
Email template	Select an existing or create a new email template.
From	Provide the name of the sender.
Active	Option to activate the activity for use.
Owning group	Owning group that the activity is associated with. **Note:** ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Activity set	Activity set that the activity is associated with.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or

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Field	Description
	criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind. **Note:** Audience records define the conditions or criteria that a user must meet.

3. In the **Recipients** related list, define the notification recipients for the lifecycle event activity.

Recipients related list fields

Field	Description
Recipient users	Users to receive the email notification.
Recipient groups	Groups to receive the email notification.
Users/Groups on case	User fields from the lifecycle event case to receive the email notification.

4. Click **Submit** or **Update**.

Flow activity parameters

Use flow activity parameters on a lifecycle event activity to automatically populate values from a subflow within an activity.

You can configure subflows for a lifecycle event and pass the values for the input parameters of the subflow within the activity.

Having the ability to call any subflow from a lifecycle event activity provides you with a low code or no code configuration.

Calling subflows from a lifecycle event activity provides an enterprise-wide workflow you can use to interact with third-party applications at a specific point in a lifecycle event.

For more information, see Flows.

Use cases

You can use flow activity parameters for:

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Offboarding

Subflow	Parameters
Terminate employee in Workday.	• Employee: Subject person • End Date: Subject person HR Profile.Employment End Date

Onboarding

Subflow	Parameters
Mark employee as a no show in Workday. (Employee accepted an offer of employment, but at some point decided to back out of agreement.)	• Employee: Subject person • Reason: Reason for no show

Transition/Rehire

Subflow	Parameters
Switch primary job	• Employee: Subject person • Job: Subject person job

For more information, see Subflows.

Map activity fields and input parameters

You can use fields from a table to map your activity field to an input parameter.

Or, you can map activity fields to an input parameter using a custom script.

For a flow

Configure a lifecycle event activity that uses a subflow.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

Procedure

1. On the Activity form, set the **Activity type** field to `Flow`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Activity type	Set the value to `Flow`.

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Field	Description
Flow	Subflow to use with the activity. **Important:** ○ Only the **Switch primary job** subflow that is used to support multiple jobs in a lifecycle event is available to use out-of-box. ○ To use a different subflow with the activity, additional configuration is required. See the Implementing multiple subflows in an LE activity [KB0817520] article in the HI Knowledge Base for more information.
Active	Option to activate the activity for use.
Badge	Badge that the fulfiller activity type is associated with. **Note:** Badges display on the portal to indicate to the employee which department is fulfilling that activity. See Configure an HR badge for more information.
Owning group	Owning group that the activity is associated with. **Note:** ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Activity set	Activity set that the activity is associated with.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind. **Note:** Audience records define the conditions or criteria that a user must meet.

3. Click **Save**.
   The **Activity Field Mappings** and **Rescind activities** tabs appear. These fields pass from the subflow.

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Configure activity field mapping

Use activity field mappings to map information from a field on a table, custom text, or a custom script to a flow input from a subflow.

Before you begin

Role required: sn_hr_le.activity_writer

About this task

The activity field mappings pass fields from the subflow you selected when configuring the lifecycle event activity.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Manage Activities**.
2. Select an activity that has **Flow** as the **Activity type**.
   For more information, see For a flow.
3. Click the **Activity Field Mappings** tab.
4. Click an activity field mapping.
5. Fill in the fields on the form, as appropriate.

Activity Field Mapping

Field	Description
Activity	The activity you are creating field mappings for.
Map from table	The table you want to map values from.
Map from	How you want to map values from the table you selected. Valid values are: ○ Field ○ Custom Text ○ Custom Script
Map from field	The field from the table you selected that you want to map your activity field. For example, you can select the Activity [sn_hr_le_case] table and the subject-person field from that table to map to the User flow input. Appears when you select **Field** from the **Map from field**.
Custom text	The text you want to map to your activity field. Appears when you select **Custom Text** from the **Map from field**.
Script	The script you want to map to your activity field.

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Field	Description
	Appears when you select **Custom Script** from the **Map from field**.
Map to flow input	The input parameter from your subflow that you are mapping from a field from a table, custom text, or custom script. For more information, see For a flow.
Input mandatory	Indicates if the input is required and reflects the settings from the subflow you selected. For more information, see Subflows.

6. Click **Submit** or **Update**.

For content

Configure a lifecycle event activity to schedule content. This activity type enables you to deliver relevant and tailored content to employees as part of the lifecycle event. For example, you can push company-related information or a first day at work banner to new hires as part of their onboarding.

Before you begin

Role required: sn_cd.content_manager, sn_hr_le.activity_writer, and membership in the owning group that owns the activity.

Procedure

1. On the Activity form, set the **Activity type** field to `Content`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Activity type	Set the value to `Content`.
Template	Schedule content template to use with the activity. **Note:** A schedule content template schedules and delivers content to users as part of a lifecycle event. See Configure a schedule content template for a lifecycle event activity for more information.
Active	Option to activate the activity for use.
Owning group	Owning group that the activity is associated with.

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Field	Description
	Note: ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records to target the content to the subject person, opened for person, or a person working on the lifecycle event case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind. **Note:** Audience records define the conditions or criteria that a user must meet.

3. In the **Activity Field Mappings** section, you can map fields from the parent lifecycle event case to the appropriate fields on the content activity.
   You can use the activity field mappings to define who the content is delivered to, when the content is delivered, how long the content is available for, and more.

   a. Click **New** or open a record.

   b. Fill in the fields on the form.

Activity Field Mapping form

Field	Description	
Activity	This field is automatically set to the name of the associated lifecycle event activity.	
Map from table	Source table that the activity field is mapped from. This field is automatically set to the name of the HR case table that the parent lifecycle event case is associated with.	
Map from	Map from type. Select one of the following:	
	Field	Map from a field. In the **Map from field** field, select the field in the source table that the activity field is mapped from.

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Field	Description	
		Note: Make sure that the data type of the field being mapped from is the same as the data type of the field being mapped to.
	Custom text	Map from custom text. In the **Custom Text** field, provide a string value. Custom text can be static or include variables that are pulled from the source table. For example, you can provide a short description for an IT request, such as, "Provide laptop for new hire: ${subject_person}."
Map to table	Target table that the activity field is mapped to. This field is automatically set to the name of the table that the child activity is associated with.	
Map to field	Field in the target table that the activity field is mapped to. **Note:** Make sure that the data type of the field being mapped from is the same as the data type of the field being mapped to.	

c. Click **Submit** or **Update**.

d. Repeat the process as needed.

4. Click **Submit** or **Update**.

For an activity container

Configure a lifecycle event activity that is a container for a group of activities. This activity type enables you to manage the dependencies of activities within an activity set. You can use activity containers to order activities, in parallel or sequence, as well as configure multiple activity containers within an activity set.

Before you begin

Role required: sn_hr_le.activity_writer and membership in the owning group that owns the activity.

Procedure

1. On the Activity form, set the **Activity type** field to `Activity container`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Activity type	Set the value to `Activity container`.

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Field	Description
Active	Option to activate the activity for use.
Owning group	Owning group that the activity is associated with. **Note:** ○ Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. ○ To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind. **Note:** Audience records define the conditions or criteria that a user must meet.

3. Right-click the former header and click **Save**.
   The **Member activities** related list appears.
4. In the **Member activities** related list, create one or more member activities of the following types:

   Note:
   - Member activities inherit the audience of the activity container.
   - Member activities trigger based on the order number assigned. Activities with the same order number trigger at the same time.
   - New member activities must be created for each activity container. You cannot move existing activities into an activity container, nor can you move member activities out of the container to use as standalone activities.
   - Member activities cannot be activity containers. You cannot place an activity container inside another activity container.

   - Approval
   - Employee
   - Fulfiller
   - Notification

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- Flow
- Content

5. Click **Update**.

For a pulse survey

Configure a lifecycle event activity that is a pulse survey. Pulse surveys capture employee feedback.

Before you begin

Role required:

Procedure

1. On the Activity form, set the **Activity type** field to `Pulse Survey`.
2. Fill in the fields on the form, as appropriate.

Activity form

Field	Description
Title	Name of the lifecycle event activity.
Description	Description of the lifecycle event activity.
Pulse survey	The survey to send.
Pulse user field	The users to whom you want to send the survey. Use the tree picker to select a field.
Active	Option to activate the activity for use.
Owning group	Owning group that the activity is associated with. **Note:** - Owning groups control who owns a lifecycle event activity. To learn more, see Configure an owning group for a lifecycle event. - To create, update, or delete an activity, you must be both a member of the associated owning group and have the sn_hr_le.activity_writer role.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of one audience record for the activity to trigger in the case. If no audience record is selected, then the activity for the activity to trigger in the case. The audience criteria for an activity set applies first. When the audience criteria is met, the activity set executes. The audience at the activity level is then checked and executed. You cannot set an audience for activity sets that have a trigger type of Rescind.

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Field	Description
	Note: Audience records define the conditions or criteria that a user must meet.

3. Click **Submit** or **Update**.

Moving an activity within an activity set

There are multiple ways you can move an activity within an activity set.

The different methods are:

- The drag-and-drop feature enables you to move an activity within an activity set or to another activity set.
- Use the reorder pop-up on an activity and select where you want the activity to reside.
- Edit the activity and select and save a new activity set or enter a new display order number to reorder an activity within an activity set.
- You cannot reorder a request activity.

  Note: Requests have a grey background around the request card for easier identification.

- You cannot move an activity above a request activity.
- If you use the  to move an activity to another activity set, by default it moves it to the top position of the activity set below any request activities.

Reorder a life cycle event activity

You can reorder an activity within an activity set for a lifecycle event using different methods.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.
2. Select a lifecycle event.
3. Select the **Activity Sets** tab.
4. Use the drag-and-drop method to select an activity with your mouse and hold it and drag it to a different location within the same activity set or into another activity set.

   Note: The ordering numbers change automatically.

5. To move an activity, select the Reorder icon ( from an activity.

   Note: If you use the Reorder icon to move an activity to another activity set, by default it moves it to the top position of the activity set below any request activities.

6. A reorder pop-up appears.

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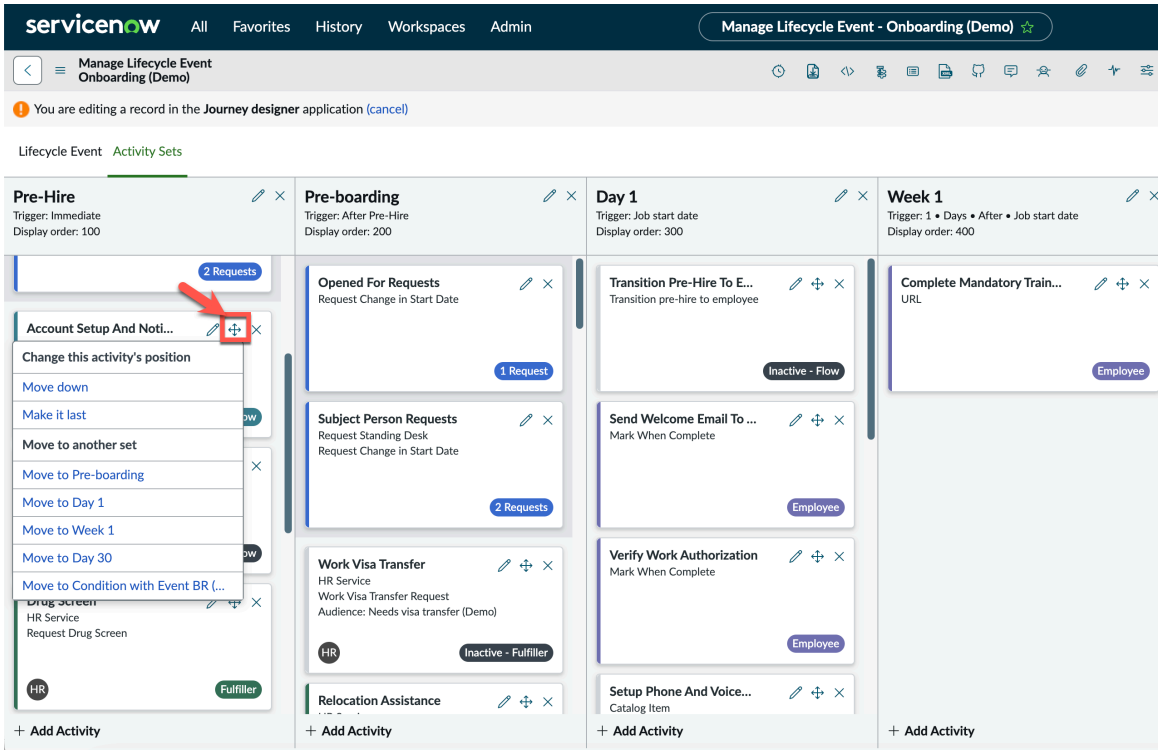
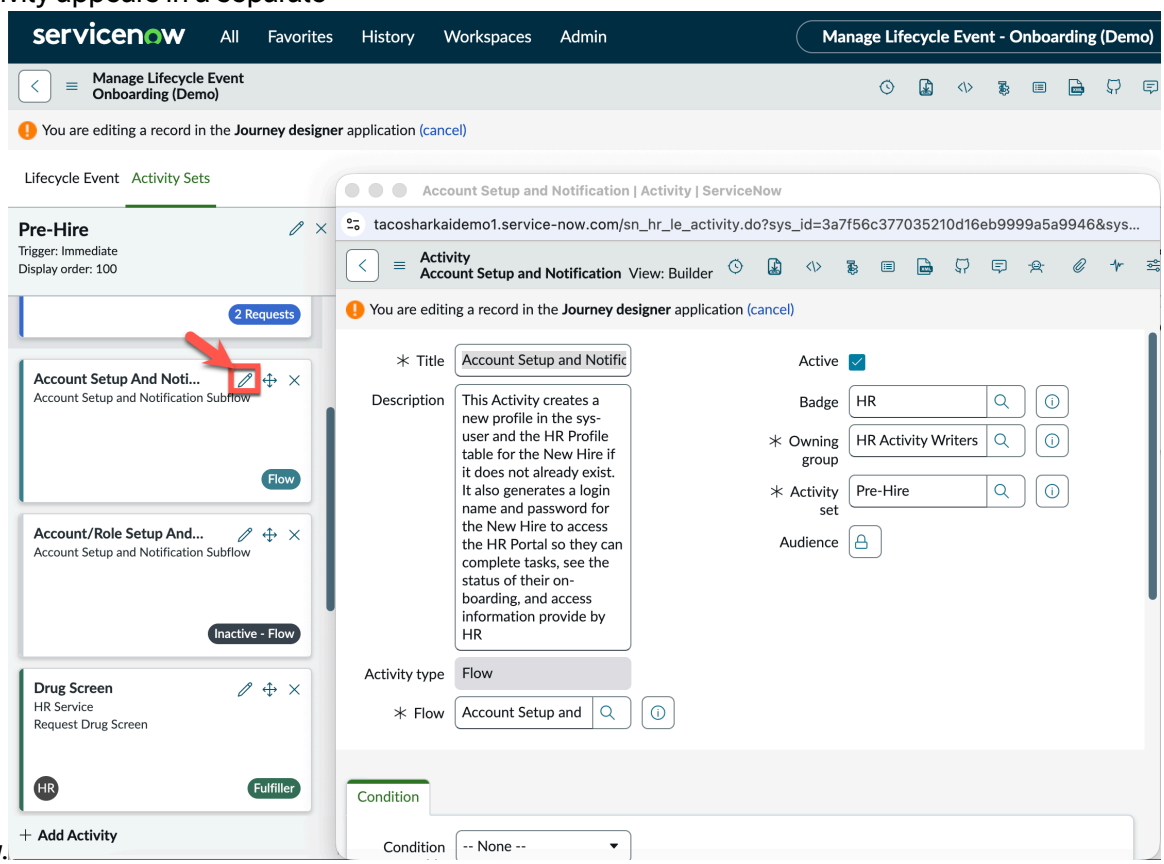


7. Select a choice with your mouse and release.

Note: The ordering numbers change automatically.

8. Another way to edit an activity is to select the Edit Activity icon ( ) on an activity. The activity appears in a separate window.



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9. Edit the **Activity set** and **Display order** fields to change the activity set the activity belongs to and the order it appears.

   Note: Requests cannot be reordered.

10. Select **Update**.

Triggering an activity from upstream activities

For a lifecycle event case, you can trigger or create an activity from an activity that is in another activity set.

Activities in later activity sets can be created based on survey responses in earlier activity sets and for users other than the person the case was created for (subject person).

You can create an activity that has a task type of Collect Employee Input and based on the results, another activity is created. In this example, the activity that has a task type of Collect Employee Input is the upstream activity. The activity that is created from this is the downstream activity.

Previously, only the Subject person could answer questions from an activity with a task type of Collect Employee Input (survey). For an New Hire Onboarding lifecycle event, the Subject person might not have access to the survey yet. Now, the Opened for, Subject person, or Assigned to can take the survey. This keeps the lifecycle event moving.

Upstream survey creates downstream survey

For example, a lifecycle event activity can task a manager with taking a survey.

- The survey asks a hiring manager if their new employees require special equipment.
- The hiring manager can answer the survey indicating if the new hires require special equipment.
- If the answer is yes, a new survey can be created in a downstream activity set that asks what specific safety equipment are required.
- Anyone that has access to the original lifecycle event case can answer the second survey requesting specific safety equipment for the new hires.
- To configure this activity, associate an HR template that has an HR task type of **Collect Employee Input**. For more information, see Configure an HR task template and Adding an HR task to an HR case.
-

System property

The sn_hr_core.create_new_survey_instances system property determines if new survey instances are created with each survey task even when an existing survey instance for the same user exists.

The default value is **True** and indicates multiple survey instances can be created.

If the value is **False**, when an existing survey instance for the same survey and same user exists, the survey is attached to the survey task.

Configure the rescind process for a lifecycle event

Cancel and revert work done in a lifecycle event case with the rescind process. Rescind activities can be defined to notify employees and departments when a case is rescinded, trigger

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automated flows, and revert work already completed, such as the provisioning of equipment or the setting up of a workplace.

Before you begin

Role required: sn_hr_le.admin or sn_hr_le.activity_set_manager

About this task

The rescind process enables you to cancel and revert work done in a lifecycle event case. For example, if a new hire decides not to join the company or a job offer is revoked, you can revert work done in the onboarding case.

Procedure

1. Enable the rescind activity set.

   a. Navigate to **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**, and open a lifecycle event record.

   b. Click the **Activity Sets** tab.

   c. Click **Enable Rescind**.
   The rescind activity set displays on the right-hand side of the lifecycle event builder.

   Note: You cannot set an audience for activity sets that have a trigger type of **Rescind**.

2. Add one or more rescind activities.

   a. Click **Add** to add a rescind activity to the rescind activity set.

   b. Fill in the fields on the form.

Rescind Activity form

Field	Description
Title	Name of the rescind activity.
Description	Description of the rescind activity.
Activity to rescind	Name of the activity to rescind. You can select any activity that is associated with the same lifecycle event type, with the exception of activity containers (you can select member activities) and other rescind activities.
Activity type	Activity type of the rescind activity. Select one of the following activity types: ▪ Approval ▪ Employee activity ▪ Fulfiller activity ▪ Notification ▪ Flow ▪ Content

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Field	Description
	▪ Activity container **Note:** For this activity type, there is no **Activity to rescind** field at the container level. When configuring the rescind member activities, you can select the corresponding activity to rescind at the member activity level.
Active	Option to activate the rescind activity for use.
Owning group	Owning group that the rescind activity is associated with.
Audience	Defines whether the activity should trigger for the lifecycle event case. You can apply one or more audience records. The subject person of the lifecycle event case must meet the conditions or criteria of all audience records for the activity to trigger in the case. If no audience record is selected, then the activity will always trigger for the case. **Important:** The rescind activity automatically inherits the audience of the underlying activity to rescind. If you clear or update the activity to rescind, the audience is also automatically cleared or updated.

c. Repeat the process as needed.

Configure an HR service for a lifecycle event

Create a corresponding HR service so that the lifecycle event can be requested for service. For example, the lifecycle event for New Hire Onboarding has a corresponding HR service also named New Hire Onboarding. When an HR case for that HR service is created, the HR case will be fulfilled by the associated lifecycle event.

Before you begin

Role required: sn_hr_core.admin

About this task

HR services are the requests and assistance an HR organization provides its employees, and they are the starting point for HR case creation. You must create an HR service for a lifecycle event so that it can be requested for service. To learn more about HR services, including whether to make an HR service available for internal use only or for employee self-service, see HR services.

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Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Select **New**.
3. On the form, fill in the fields.

HR Service Configuration form

Field	Value
Fulfillment type	Set the value to `Lifecycle Event`.
Lifecycle event type	Select the lifecycle event you want to fulfill the HR service. **Warning:** If the lifecycle event type field of an HR service is the same as the lifecycle event (LE) type that's being used in an LE activity, a loop can be created that causes memory issues.
COE	Select the COE you want the HR service to be categorized under. **Note:** An HR service for a lifecycle event can be associated with any HR Center of Excellence (COE).

4. Fill in the other fields on the form, as appropriate.
   For further details on the form fields, see Configure an HR service.
5. Click **Submit** or **Update**.

Configure an HR service for a journey

Create a corresponding HR service so that the lifecycle event can be requested for service as part of an employee's journey.

Before you begin

Role required: sn_hr_core.admin

About this task

HR services are the requests and assistance an HR organization provides its employees, and they are the starting point for HR case creation. You must create an HR service for a lifecycle event so that it can be requested for service. To learn more about HR services, including whether to make an HR service available for internal use only or for employee self-service, see HR services.

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Click **New**.
3. On the HR Service form, provide the following field values.

HR Service form

Field	Value
Fulfillment type	Set the value to `Journey`.

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Field	Value
Lifecycle event type	Select the Lifecycle event you want to fulfill the HR service.
Journey configuration	Select the Journey designer journey you want to associate with the Lifecycle event.
COE	Select the COE you want the HR service to be categorized under. **Note:** An HR service for a Lifecycle event can be associated with any HR Center of Excellence (COE).

4. Fill in the other fields on the form, as appropriate.
   For further details on the form fields, see Configure an HR service.
5. Click **Submit** or **Update**.

Using the Test Activity Sets tool for a lifecycle event activity set

Use the lifecycle event test tool to thoroughly test a lifecycle event before launching it.

The lifecycle event test tool provides different views of a lifecycle event. The different views available are:

- Use filters to show only applicable activity sets and activities for the subject person. For example, you can select a subject person and preview what that person will see and what tasks are assigned to them.
- You can use conditions like HR criteria to view what activity sets and activities the selected people will see and what tasks are assigned to them.
- Each activity set and activity can be assigned to specific audiences. You can view the activity sets and activities applicable to a specific audience.
- You can also view all activity sets and activities that are not applicable to an audience.

Note: When a user matches an activity but not an activity set, the activity set and activity will still appear.

Inapplicable activities and sets

When using the lifecycle event test tool, you can show activities and sets that are inapplicable for a subject person.

A subject person is considered inapplicable when they do not meet the audience criteria for a specific activity or activity set.

Indeterminate activities and sets

When using the lifecycle event test tool, you can show activities and sets that are indeterminate for a subject person.

A subject person is considered indeterminate when there is not enough information to determine if the subject person is part of the audience.

Preview and test a lifecycle event

Preview and test a lifecycle event for different audience types. You can preview a lifecycle event to validate which activities will trigger or not for a particular audience. You can then create a test lifecycle event case for different users and select which activities to include or exclude in your test.

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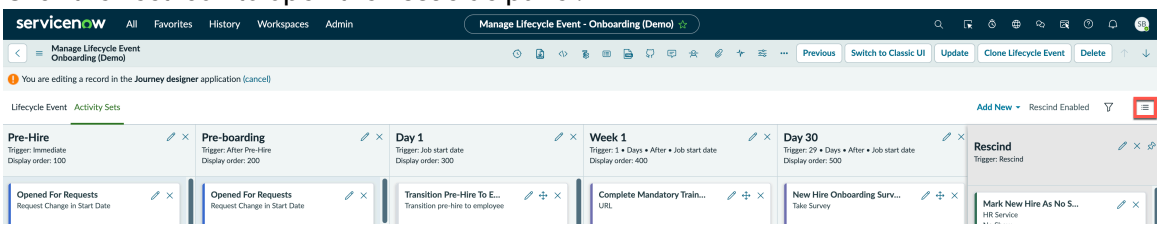
Before you begin
Role required: sn_hr_le.admin

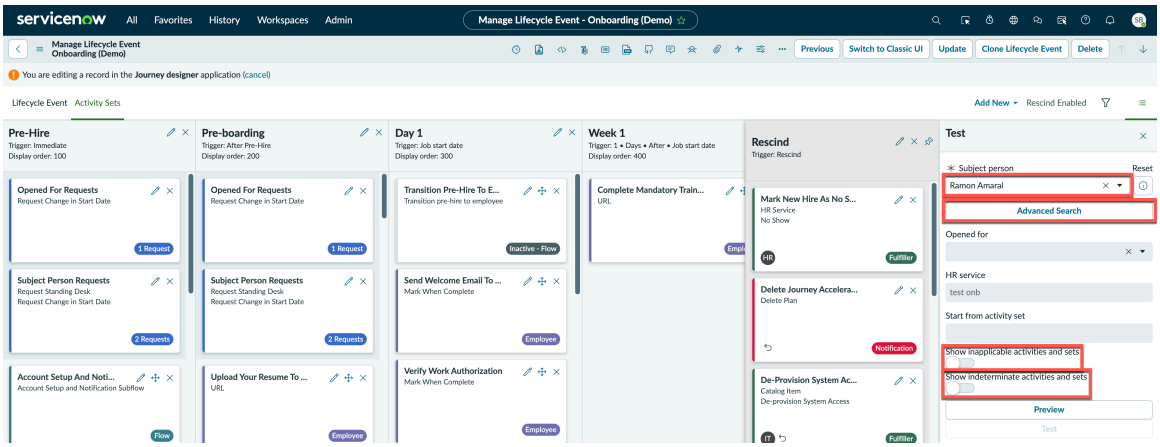
Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**, and open a record.
2. Click the **Activity Sets** tab to access the lifecycle event builder.
3. Click the Test icon to open the **Test** side panel.



4. In the **Test** side panel, select a subject person for the lifecycle event test.

> **Note:** To select a subject person based on the audience, click **Advanced Search** to find and select a user based on the specified conditions or criteria.



5. Click the **Show inapplicable activities and sets** button so it turns green if you want to show all activities and activity sets that are not applicable for the subject person.
   For more information, see Preview and test a lifecycle event.
6. Click the **Show indeterminate activities and sets** button so it turns green if you want to show all activities and activity sets that cannot be determined for the subject person.
   For more information, see Preview and test a lifecycle event.
7. Click **Preview** to preview the lifecycle event workflow.
8. Click **Test** to create a lifecycle event case.
   An HR case for the lifecycle event for the selected subject person is created.

Select a Lifecycle Event for Now Mobile

Select the Lifecycle Event that you want to use with Now Mobile. When an onboarding case for that event type is created, the new hire completes the to-dos that are associated with that case.

Before you begin
Role required: sn_hr_le.admin

You must also make sure that the **Display activity sets to subject person** option is selected, as well as the **Show case to subject person** option on the corresponding HR service.

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A Lifecycle Event administrator must have set up the Lifecycle Event and the corresponding HR service you want to use with Now Mobile. See Building a lifecycle event for more information.

Procedure

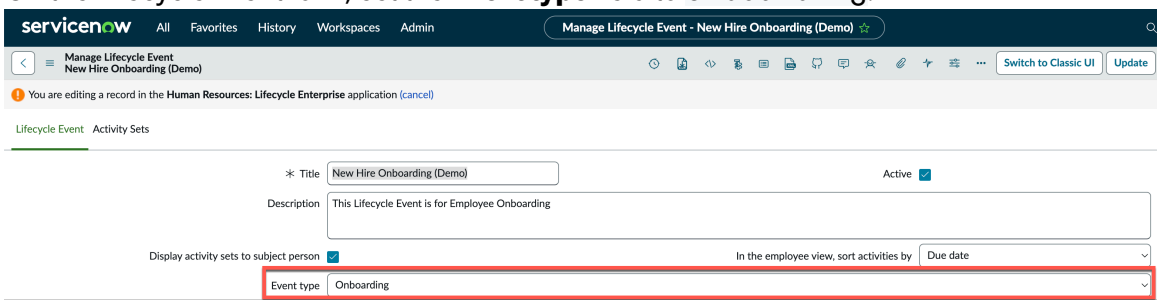
1. Select the Lifecycle Event you want to use with Now Mobile.
   Also make sure that the **Display activity sets to subject person** option is selected.

   a. Navigate to **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.

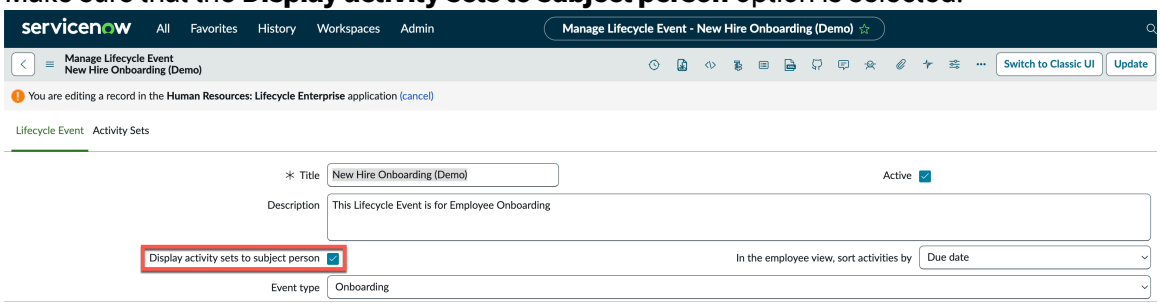
   b. Open the Lifecycle Event record.

   > **Note:** A preconfigured Lifecycle Event named New Hire Onboarding is available to use.

   c. On the Lifecycle Event form, set the **Event type** field to `Onboarding`.



   d. Make sure that the **Display activity sets to subject person** option is selected.



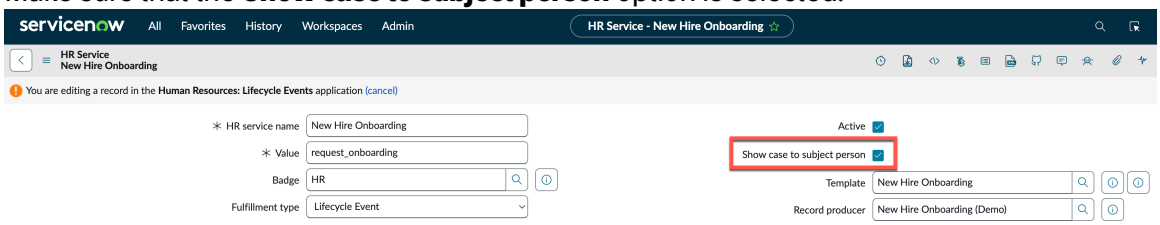
2. On the corresponding HR service form, make sure that the **Show case to subject person** option is selected.

   a. Navigate to **HR Administration** > **HR Services** > **HR Service Configuration**.

   b. Open the corresponding HR service record.

   > **Note:** A preconfigured HR service named New Hire Onboarding is available to use.

   c. Make sure that the **Show case to subject person** option is selected.



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Lifecycle Events employee requests

You can create and track requests that are opened by users from within Lifecycle Events so that your users don't have to create a new HR case or request. Requests from your users can be either an HR service or a catalog item.

If you have the sn_hr_le.admin or admin role, you can configure employee requests from the Human Resources (HR) app. Your users can open requests in the Employee Center from an activity set that is assigned to them.

Configure Lifecycle Events employee requests

Enable your managers and employees to open employee requests directly from Lifecycle events so that they don't have to create a new HR case or request.

Before you begin

Role required: sn_hr_le.admin or admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.
2. To add employee requests to the event, open a Lifecycle Event and click the **Activity Sets** tab.
3. Navigate to **Add New** > **Employee Request**.
4. On the form, fill in the fields.

Employee Request form

Field	Description
Title	Title that appears in the Action list menu in the HR case.
Description	Details about the request.
Requester	Person who has access to view and make requests. ○ **Opened for**: Person that the Lifecycle Events case was opened for. ○ **Subject person**: Person that is the subject of the LE case. (This person may or may not be the same person that the request was opened for.)
Category	Employee Requests category types. ○ For the HR Service category type, see HR services. ○ For the Catalog Item category type, see Service catalog items.
HR Service	Requests and assistance that an HR organization provides its employees.
Catalog Item	Goods or services that are available for requests.
Active	Option that an employee or manager can select to make the request available.

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Field	Description
Blocks activity set completion	○ When selected, the employee request must be completed before an activity set is marked as completed. ○ If unselected, the activity set completes if all the underlying activities are complete regardless of whether the employee request is fulfilled.
Activity Sets	Sets of activities that the employee request is available in.
Audience	Specific groups of users that have access to the employee request. For more information about these groups, see Audiences.

5. Click **Submit**.

Related topics

Verify Lifecycle Events Employee requests configuration

Filter lifecycle event activities

Verify Lifecycle Events Employee requests configuration

Use the Preview and Test capabilities to verify that the employee request activity has been configured correctly.

Before you begin
Role required: sn_hr_le.admin or admin

About this task
Verify that the Employee request menu item for "Request Change in Start Date" is available in an activity set.

This task requires that you download the demo data that is provided with the Human Resources Scoped App: Lifecycle Events for Enterprise.

Procedure
1. Navigate to **All** > **Application** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.
2. Click **New Hire Onboarding (Demo)**, and open the**Activity Sets** tab.

   Note: If you don't see this life-cycle event, download the demo data provided with the Human Resources Scoped App: Lifecycle Events for Enterprise.

3. Click the **Test Activity Sets** icon.
4. Click **Preview** then click **Test**.
   Wait for the confirmation message "New Hire Onboarding (Demo) case created..." to display.

   Note: In preview mode, all employee requests appear regardless of audience, Opened for, or Subject person settings. Employee requests for the appropriate configuration appear in the completed test results.

5. Navigate to **Self-Service** > **Employee Center** and click **To-dos**.

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6. Open the "New Hire Onboarding - administrator" activity set.
   The "New Hire Onboarding - System Administrator" activity set link is below the title of each of the To-dos.
7. Click **Actions** to view the available menu items.
   Verify that the "Request Change in Start Date" menu item is available in the activity set.

> **Note:** Menu items are visible to different users depending on the audience configuration for the request. In this example that uses demo data, all users see the menu item.

Create a Lifecycle Events Employee Request from the Employee Center

Enable your users to create common requests from Lifecycle Events so that they don't have to create a new HR case or request. When your users open a request, any related cases and tasks are automatically associated with the parent event.

Before you begin

Role required: sn_hr_le.admin

About this task

> **Note:** This task is based on the demo data that is available with the Human Resources Scoped App: Lifecycle Events for Enterprise. Download the HR Scoped App demo data before completing this task.

Procedure

1. From your Employee Center home page, click **To-dos**.
2. Open the New Hire Onboarding request.
3. From the Actions list, click **Request Standup Desk**.
4. Click **Order Now**.
5. Complete the **Order Confirmation**, and click **Checkout**.

What to do next

Click **Requests** to view your request.

> **Note:** The HR case or catalog request that was initiated from the employee request is associated with the parent Lifecycle Events case. Agents can see the status of the employee request from the Lifecycle event.

Lifecycle Events logging

Lifecycle Events supports logging to capture events that occur in a Lifecycle Events case. Organization administrators can use the event logs that are generated to identify errors or to acquire information about the processes that ran in a Lifecycle Events case.

The Lifecycle Events application is designed for managing HR cases that are long term in nature. These HR cases represent the different types of life cycle events that transpire during the career of a working professional. The Lifecycle Events types for which an HR case is intended are linked to significant phases in an employee's career. These Lifecycle Events types include, but aren’t limited to, onboarding, offboarding, parental leave of absence, and performance improvement plans. Each Lifecycle Events type consists of activities, such as tasks and notifications, which are grouped into activity sets. The activity sets associated with a Lifecycle Events case represent different stages in the life cycle event process and have conditions under which they’re triggered.

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The many layers that comprise Lifecycle Events contribute to the application's complexity. The complexity is further compounded by its broad range of components and numerous configurable options, increasing the potential for processing error. To help Lifecycle Events administrators identify and understand the errors that surface in the application, logging can be enabled and used as a tool to diagnose problems.

Logging components

Lifecycle Events uses the following components to record event logs for the activity associated with a Lifecycle Events case:

Script includes

The following script includes are used to support logging:

- LifecycleEventLogger
- LifecycleEventLoggerSNC
- sn_hr_LE_Error

Table

Lifecycle Events records each log entry to the HR Lifecycle Events Case Logs [sn_hr_le_case_log] table.

System property

The *sn_hr_le.log_level* property lets you specify the types of logs that are written to the HR Lifecycle Events Case Logs table.

Related topics

Lifecycle Events activity set progress optimization

Enable logging for Lifecycle Events

Use the *sn_hr_le.log_level* system property to enable logging for Lifecycle Events. The log entries that are generated can be used to identify errors or to acquire pertinent data about the processes that ran in a Lifecycle Events case.

Before you begin

Role required: admin [sn_hr_le.admin]

Procedure

1. Navigate to the **All** menu, and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.
2. Select **Name** from the drop-down list associated with the **Search** field.
3. In the **Search** field, enter `*sn_hr_le`.
   A list of system properties associated with Lifecycle Events appears.
4. Select the *sn_hr_le.log_level* property.
5. Use the **Value** field to specify the option that corresponds with the type of logging you want Lifecycle Events to perform.

Option	Description
NONE	Logging is deactivated.
ERROR	Logging is enabled. Only error logs are recorded for each Lifecycle Events case.

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Option	Description
INFO	Logging is enabled. Error and info logs are recorded for each Lifecycle Events case.
DEBUG	Logging is enabled. Error, info, and debug logs are recorded for each Lifecycle Events case.

6. Select **Update**.

View log entries for a Lifecycle Events case

View the log entries associated with a Lifecycle Events case to acquire pertinent information about the processes that ran and to identify any errors that surface. The error logs can be used as a tool to diagnose problems and effectively troubleshoot the root cause of an issue that is adversely affecting a Lifecycle Events case.

Before you begin

Role required: admin [sn_hr_le.admin]

Procedure

1. Navigate to **All** > *Lifecycle Events* > *Lifecycle Events* **Cases**.
2. Select a Lifecycle Events case from the list of HR cases that appear.
3. Under Related Links, select **Show execution logs**.
   The HR Lifecycle Events Case Logs [sn_hr_le_case_log] table appears.
4. View the list of log entries to acquire the information you need about an error or a process that ran.

Clone a lifecycle event

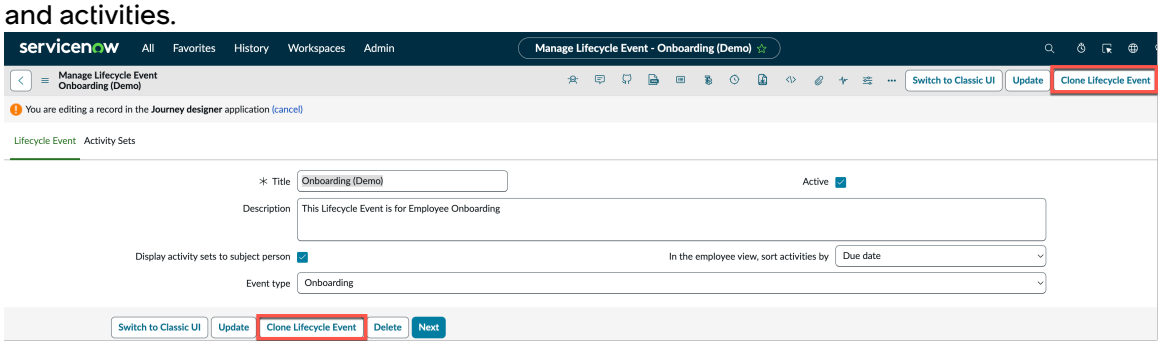
Clone a lifecycle event and its associated activity sets and activities with the lifecycle event builder.

Before you begin

Role required: sn_hr_le.admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**, and open a record.
2. Click **Clone Lifecycle Event** to clone the lifecycle event and all of its associated activity sets and activities.



Once complete, a message that the lifecycle event was successfully cloned appears.

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What to do next
After cloning a lifecycle event, you can filter lifecyle event activities. See, Filter lifecycle event activities

Create an HR case for a lifecycle event

Create a lifecycle event case. A lifecycle event case is an HR case that is fulfilled by a lifecycle event. For example, the HR service for New Hire Onboarding is fulfilled by the lifecycle event for New Hire Onboarding.

Before you begin
Role required: sn_hr_le.case_writer

A lifecycle event administrator must have built the lifecycle event and created a corresponding HR service before you can create a case for that event. See Building a lifecycle event for more information.

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
2. In the **Search for Employee** field, select the employee you are creating the case for.

   Note: You can search by employee name, partial employee name, case number, or any indexed field on the HR Profile of the sys_user table.

3. On the HR case creation form, under the **Case Details** section, select the HR service you are requesting for the employee.
4. Click **Create Case** to create the HR case.
5. On the HR case form, fill in the fields on the form, as appropriate.
   For further details on the form fields, see Work an HR case.
6. Click **Ready for Work** to change the state from **Draft** to **Ready**.

What to do next
After you create a lifecycle event case, you can track the case's progress and monitor the status of the individual activity sets and activities.

The following GIF shows an example of an in-progress lifecycle event case.

Note: You can drill down from the lifecycle event case list view to monitor the status of the individual activity sets and activities. You can also drill down from the individual event case form.

Ad hoc cases and tasks for lifecycle event cases

You can add an ad hoc task or case to an active lifecycle event case and associate it to a specific activity set. When tasks are added they appear for the subject person under **My Tasks** or the **Review your work** in the Employee Center or Employee Center Pro.

Lifecycle events are a collection of activities (services, tasks, requests, notifications, etc.) that are organized to provide an employee experience. Examples of an employee experience are new hire onboarding or when an employee takes parental leave. In a lifecycle event, all employees that are part of a specific audience go through the same experience.

Ad hoc tasks or cases are not part of an original lifecycle event configuration. Ad hoc tasks or cases can be added to an existing stage or bundle of a lifecycle event that is in progress and active.

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Note: You cannot add a task or case to a closed or completed activity set.

When an agent adds an ad hoc task or case, it also becomes visible to the Subject person in the Employee Center or their mobile device. This allows the Subject person of a case to perform a task or respond to a request.

Adding an ad hoc case or task to an active lifecycle event case provides agents with flexibility that does not disturb the original structure.

Examples of when an ad hoc task or case are useful:

Extend family leave

An employee is on parental leave, but wants to extend their leave.

An agent can add a new case to the employee's parental leave lifecycle event that extends their leave.

Adding a new case that extends an employee's parental leave becomes a child case of the parent lifecycle event case.

Changing personal information during onboarding

Another example is when a new hire is going through the onboarding process of a lifecycle event.

A new hire wants to change personal information, but there is no way to do this while onboarding.

An agent can create a new task for the new hire that appears in the current activity set as a to-do.

Required plugins

To use the lifecycle event ad hoc feature, the following plugins are required:

- Human Resources Scoped App: Core [com.sn_hr_core]
- Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events]

Optional plugins

The following plugins are optional that allows you to create or view ad hoc tasks or case in alternative places:

- Human Resources Scoped App: Workspace [com.sn_hr_agent_workspace]
- Playbook Experience [com.playbook_experience]

Create an ad hoc case or task

You can create a case or task and add it to a stage (bundle) while a lifecycle event is in progress.

Before you begin

Role required: sn_hr_le.case_writer

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Lifecycle Events Cases**.
2. Select a case that has a state that is active (for ad hoc tasks only).

Note: To add an ad hoc case, the lifecycle event case cannot be in the Closed Complete, Closed Incomplete, or Cancelled, states.

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3. Scroll down to the Related Links section of the case form.
4. Select **Add a child case** or **Add task**.
   For more information, see Create an HR case for a lifecycle event and Adding an HR task to an HR case.
5. After filling in the required fields, ensure you select a value from the **Stage** field.
   For an HR case, the **Stage** field is located in the Case Details section. For an HR task, the **Stage** field is between the **Template** and **Display order** fields.
   If you do not associate a task or case with a stage in the lifecycle event, the task or case becomes a child of the parent case, but is not included in the lifecycle event.

   Note: Stage is also known as an activity set or bundle. For more information, see Configure a lifecycle event activity set.

Monitor the status of a lifecycle event case

Monitor the status of a lifecycle event case with activity set execution contexts. You can monitor the state of each activity set in a lifecycle event case. You can further monitor the state of the individual activities. You can also report on the activity set contexts table in conjunction with the HR case table.

Before you begin

Role required: sn_hr_le.activity_reader

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Lifecycle Events Cases**.

   Note: Alternatively, you can navigate to **Lifecycle Events** > **Administration** > **Execution Contexts** to view all execution context records.

2. Open a lifecycle event case.
3. Under the **Related Links** section, click **Activity Set Execution**.
4. From the Activity Set Contexts list, you can monitor the state of each activity set in the lifecycle event case.

Column headers in Activity Set Contexts table

Column headers	Description
Activity set	Activity set that is associated with the lifecycle event case.
State	Status of the activity set: ○ Awaiting Trigger ○ Running Activities ○ Finished ○ Error **Note:** You can monitor the status of individual activities by opening the activity set context record.
HR case	Lifecycle event case that is being monitored.

5. To further monitor the state of each activity within an activity set:

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a. Click the preview button for the applicable activity set.

b. On the Activity Set Context form, under the Activity Status section, you can monitor the state of each activity within the activity set.

Resume a lifecycle event case

Resume a lifecycle event case after a workflow error or workflow timeout.

Before you begin

Role required: sn_hr_le.case_writer

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Lifecycle Events Cases**, and open the lifecycle event case that errored.
2. Identify and fix the error.

   Tip: Navigate to the **Comments and Work Notes** section in the case to view the work note on why the workflow failed.

3. Click **Resume** to resume the case.
   The lifecycle event case resumes from where it was errored out.

   Important: You cannot resume the case if it was in **Closed Complete**, **Closed Incomplete**, or **Cancelled** state.

Filter lifecycle event activities

Filter lifecycle event activities by activity type, owning group, audience, and rescind. You can also search for individual activities by name.

Before you begin

Role required: sn_hr_le.admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**, and open a record.
2. Click the **Activity Sets** tab to access the lifecycle event builder.
3. Click the Filter icon to open the **Filters** side panel.
4. In the **Filters** side panel, select filters from the list, or type an activity's tile in the input field.

Support multiple jobs in a lifecycle event

Use the Jobs table to create lifecycle event cases where you can specify which job the case pertains to.

Before you begin

Role required: sn_hr_core.admin

For example, say that you have an intern that is being transferred to a full-time position. The intern has two associated job records. When an onboarding case for the full-time position is created, the case is associated with the full-time job record, ensuring that downstream activity sets and activities are triggered based on information from that relevant job record.

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About this task

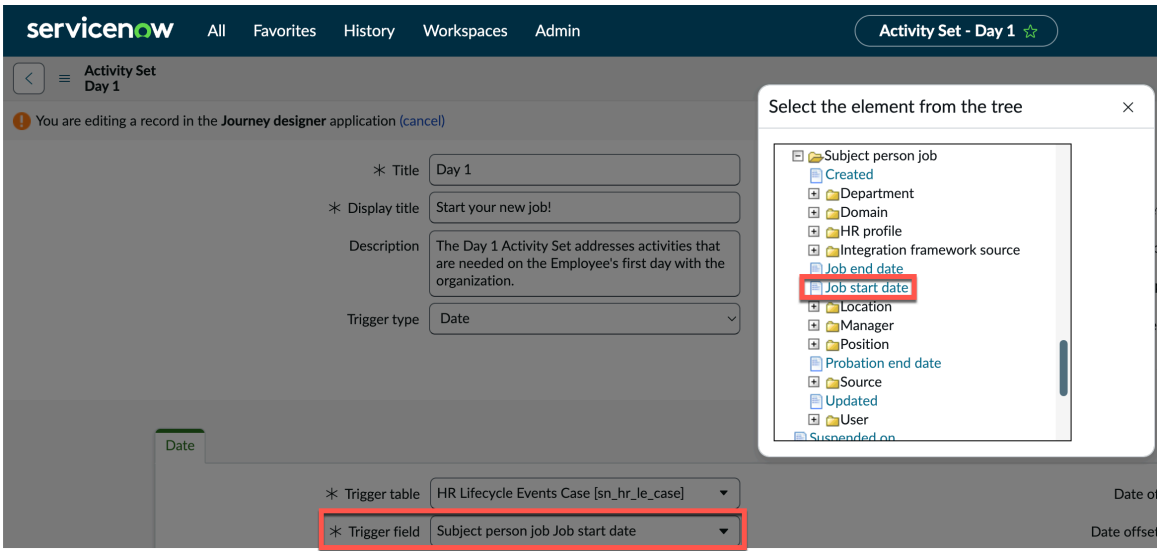
Beginning in the New York release, you can use the new Jobs (sn_hr_core_job) table to store multiple job records per user and capture the job history of users within your organization. See Capturing multiple job records for a user for more information.

Procedure

1. If you are using an integration to pull HR profiles from a third-party system, configure your integration to pull jobs information into the Jobs (sn_hr_core_job) table.
   For details on how to configure a third-party integration with HR Service Delivery, see Integration of HR Service Delivery with third-party systems.
2. For HR case creation, associate the subject person's job to the HR case with the **subject_person_job** field.

   Example
   For example, for the preconfigured New Hire Onboarding lifecycle event, the *`Create HR Case if Start Date is Future`* business rule for the Jobs table is configured to automatically create onboarding cases for users with a future job start date. When the rule creates the onboarding case, it uses the **subject_person_job** field to specify which job the user is being onboarded for.
3. For the lifecycle event, make sure that the relevant activity sets are triggered by the subject person's job by updating the **Trigger field** value to **subject_person_job**.

   Example
   For example, the Day 1 activity set in the preconfigured New Hire Onboarding lifecycle event is triggered by the subject person's job start date.



4. If you are not using a third-party integration and need to configure the switch of a primary job, you can use the **Switch primary job** subflow to switch the subject person's primary job through a lifecycle event activity.

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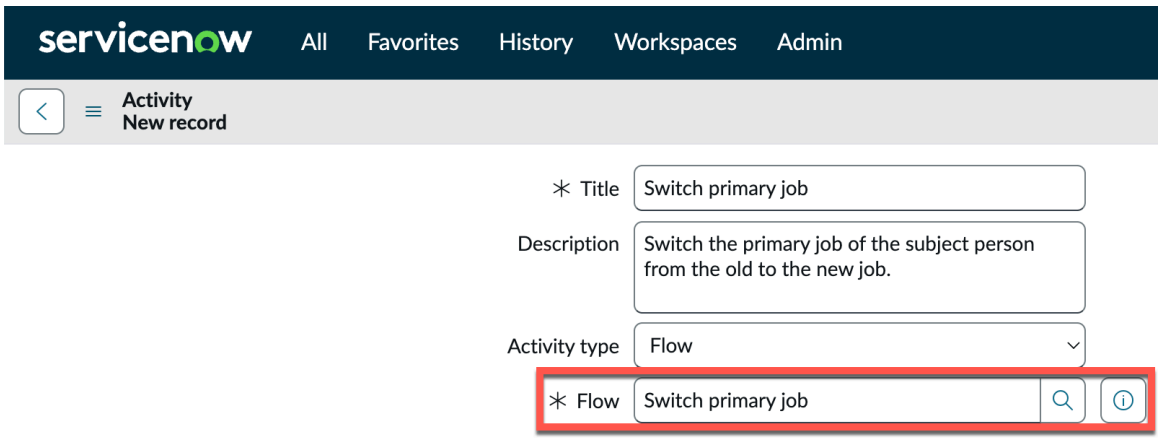
Example
For example, you can create a lifecycle event activity to switch the primary job of the subject person from the old to the new job by setting the **Activity type** value to **Flow** and the **Flow** value to **Switch primary job**.



Related topics

- hr_Utils - Global
- hr_ActivitySet - Global
- hr_ActivityUtils - Global

Configure the UI of the lifecycle event builder

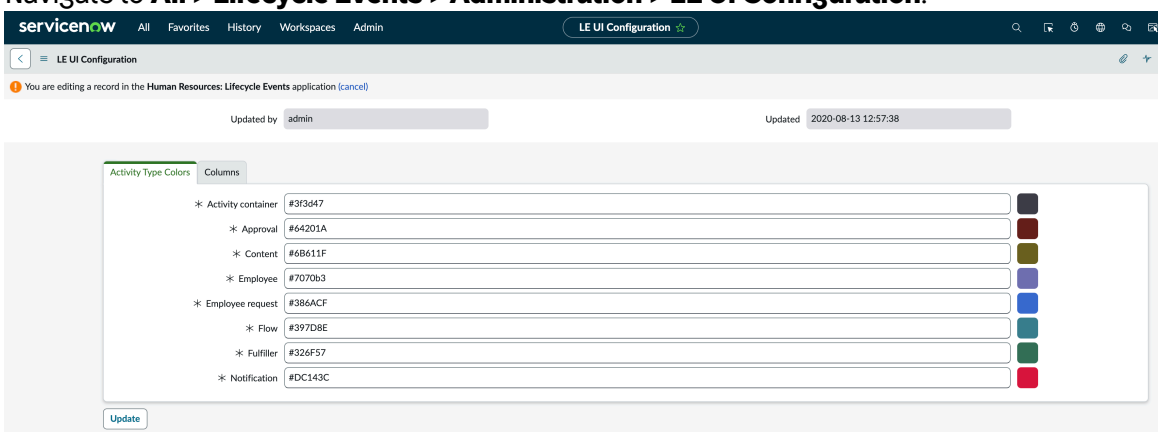
Customize the appearance of the lifecycle event builder. You can change the colors of the different activity types, as well as change the color and size of the activity set columns.

Before you begin

Role required: sn_hr_le.admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **LE UI Configuration**.



2. To configure the activity type colors, enter the hex color or the name of the color you want.
3. To configure the columns, you can define the colors and size (in pixels).
4. After making any edits, click **Update**.

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Lifecycle Events reference

Reference content helps administrators and users understand the installed components of an application and how those components interact.

Lifecycle event properties

Lifecycle event properties control the behavior of lifecycle events. You can set the duration of the activity set closure time in hours.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Properties**.
2. Update the lifecycle event properties, as appropriate.

Lifecycle event properties form

Property	Description
sn_hr_le.All activity set closure timer	Duration of the activity set closure time in hours and determine when an activity set triggers for a lifecycle event. By default, the time is set to four hours. Use caution if you decide to change the default value. Frequent updates trigger more events and can cause your lifecycle event activity sets to cancel before it can complete. **Note:** To trigger an activity set proactively rather than wait for the value entered in this property, see Lifecycle Events evaluation interval.

3. Click **Save**.

Components installed with Lifecycle Events for Enterprise

Several types of components are installed with the activation of the Human Resources Scoped App: Lifecycle Events for Enterprise plugin [com.sn_hr_lifecycle_ent] plugin, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Roles in Lifecycle Events for Enterprise

Role title [name]	Description	Contains roles
Lifecycle events for enterprise administrator [sn_hr_le_ent.admin]		None

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Components installed with Lifecycle Events

Several types of components install with the activation of the Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events] plugin, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature, and it's used in some related example tasks.

Note: The Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events] plugin activates the sn_hr_le.min_admin_count system property [sys_properties.list]. This property helps to prevent you from deleting your only Enterprise Onboarding and Transition admin user by requiring a minimum number (the default is two) of active users with this role.

Roles installed

Roles in Lifecycle Events

Role title [name]	Description	Contains roles
Lifecycle Events administrator [sn_hr_le.admin]	Grants access to create, manage, and add users to groups within Lifecycle Events. Can access: • Guided Setup • Manage Owner Groups • Manage Roles • LE UI Configuration • Onboarding Executive Dashboard • Onboarding Executive View	• sn_hr_le.activity_set_manager • skill_admin • sn_hr_le.case_reader • sn_hr_le.case_writer • sn_hr_core.content_writer • sn_hr_le_pa.admin (When PA-Content Pack - HR LE Scoped App plugin activates) • pa_viewer • survey_admin
Activity reader [sn_hr_le.activity_reader]	Can read HR activity sets and activities.	None
Activity set manager [sn_hr_le.activity_set_manager]	Can activate and trigger HR activity sets.	sn_hr_le.activity_writer
Activity writer [sn_hr_le.activity_writer]	Can create HR activity sets and activities.	sn_hr_le.activity_reader
Case reader [sn_hr_le.case_reader]	Can read Lifecycle Events cases.	sn_hr_core.case_reader

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Roles in Lifecycle Events (continued)

Role title [name]	Description	Contains roles
Case writer [sn_hr_le.case_writer]	Can create Lifecycle Events cases.	• sn_hr_core.case_writer • sn_hr_le.case_reader
HR Performance Analytics administrator [sn_hr_le_pa.admin]	Lifecycle Events Performance Analytics Admin role for the scoped application. • Access and modify the Lifecycle Events PA content packs. • Edits Performance Analytics properties. • Accesses Admin Console. • Launch Dependency Assessment. **Note:** This role is contained in the Lifecycle Events administrator role [sn_hr_le.admin].	None

Important: After the Lifecycle Events plugin is installed, the Lifecycle Events administrator (sn_hr_le.admin) role is automatically assigned to the IT system administrator (admin) role. Use the admin role to assign the sn_hr_le.admin role to at least two users in your organization. If one of the two users is deactivated in the future, the user that remains active can reassign the sn_hr_le.admin role to other people in your organization.

After the sn_hr_le.admin role has been assigned, remove the role from the admin role to suppress the IT system administrator from viewing sensitive HR information. The removal of the sn_hr_le.admin role from admin role ensures that only the Lifecycle Events administrator has access to the sensitive information.

For more information about the process to remove an HR administrator role from the admin role, see Remove HR Administrator role from IT System Administrators.

The Lifecycle Events administrator (sn_hr_le.admin) role with the Delegated Developer (delegated_developer) role can also configure and create COEs. For more information, see HR Centers of Excellence data model.

You can assign these roles to the appropriate roles, groups, or users in your application.

- To assign a role to another role, see Add a role to an existing role.
- To assign a role to a group, see Assign a role to a group.
- To assign a role to a user, see Assign a role to a user.

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For further information on user administration and how to manage users, see User administration.

Tables installed

Tables installed with Lifecycle Events

Table	Description
Activity [sn_hr_le_activity]	Details of activities that are part of an activity set and together make up a life cycle event. Extends the Activity Base [sn_hr_le_activity_base] table.
Activity Base [sn_hr_le_activity_base]	Extends `sys_metadata`.
Activity Field Mapping [sn_hr_le_activity_field_mapping]	Details of an activity field mapping that pass information from the parent life cycle event case to an activity.
Activity Set [sn_hr_le_activity set]	Details of activity sets and activities that make up Lifecycle Events.
Activity Set Context [sn_hr_le_activity_set_context]	Created for each Activity Set when the life cycle event initializes. Tracks the state of each set (triggered, waiting for activities to complete, and more). Works with the Activity Status [sn_hr_le_activity_status] table to provide filtering for the Lifecycle Events widget on the Ticket page.
Activity Status [sn_hr_le_activity_status]	Created when an Activity Set triggers and tracks the state of the activity created. Tracks the progress of the Activity for each Lifecycle Events case that initializes. Works with the Activity Set Context [sn_hr_le_activity_set_context] table to provide filtering for the Lifecycle Events widget on the Ticket page.
Fulfiller Activity Configuration [sn_hr_le_fulfiller_activity_config]	Fulfiller activity configuration passes field information from the Lifecycle Events Case [sn_hr_le_case] table to the HR case [sn_hr_core_case] table
Fulfiller Activity Configuration Mapping [sn_hr_le_fulfiller_activity_config_mapping]	Fulfiller Activity Configuration Mappings copy to all activities created using the fulfiller configuration.
HR Lifecycle Events Case	Details of a submitted Lifecycle Events case.

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Tables installed with Lifecycle Events (continued)

Table	Description
[sn_hr_le_case]	• Account Notification • Request Onboarding Extends the HR Case [sn_hr_core_case] table.
Lifecycle Events Type [sn_hr_le_type]	Lifecycle Events Types are a way to organize activity sets and activities together. Lifecycle Events Types act as a container for activity sets and activities. Lifecycle Events Types are also associated with an **HR Service**.
LE UI Configuration [sn_hr_le_builder_ui_configuration]	Lifecycle Events user interface configuration details.
Employee Request sn_hr_le_employee_request	Tracks details of Employee Requests. Created when an Employee Request is created. Works with the Activity Base [sn_hr_le_activity_base] table.
Future To-dos [sn_hr_le_future_todo]	Tracks details about activities waiting to be triggered.

For further information on table administration and how to manage data, see Table administration.

Lifecyle events for enterprise

The Lifecyle events for enterprise application supports automation of onboarding and other employee lifecycle events.

The Lifecyle events for enterprise application helps to improve employee satisfaction and efficiency across HR and other departments for events that span multiple departments.

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Explore	Configure	Integrate
		
Learn about automating the fulfillment of employee lifecycle events such as new hire onboarding, offboarding, relocation, promotion, parental leave, and more.	Install and configure related apps and processes.	Extend Enterprise Onboarding and Transitions features with integrated features and services.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Understanding Lifecyle events for enterprise

Use Lifecyle events for enterprise to automate the fulfillment of employee lifecycle events such as new hire onboarding, offboarding, relocation, promotion, parental leave, and more. Lifecycle events are a collection of activities organized into activity sets to comprise an employee experience.

Lifecyle events for enterprise Overview

Lifecyle events for enterprise enables organizations to easily automate employee experiences and processes that span multiple departments, offering the following benefits.

- Easily snap together experiences and processes to automate cross-departmental work
- Drive action across multiple departments and systems for improved efficiency
- Provide end-to-end visibility on each process to ensure that correct actions are taken
- Guide employees step-by-step so that they know what to do next
- Continually optimize the process with insight from lifecycle event dashboards

The following video provides an overview of the Lifecyle events for enterprise application.

This video provides an overview of the Lifecyle events for enterprise application.

Activation information

Beginning in the Orlando release, Lifecyle events for enterprise is comprised of two plugins. Depending on the HR Service Delivery package you choose, activate one or both of the plugins.

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Lifecyle events for enterprise plugins

Plugin	Description
Lifecycle Events [com.sn_hr_lifecycle_events]	Enables you to easily configure digital workflows to manage employee lifecycle events within HR. See Activate Lifecycle Events for more information.
Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent]	Enables you to automate onboarding and other employee lifecycle events that span across multiple departments such as HR, IT, Facilities, Finance, and Legal through a single service delivery platform. See Activate Lifecycle Events for Enterprise for more information. **Note:** The lifecycle event for new hire onboarding is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Configuring Lifecyle events for enterprise

Depending on your role, you can access and configure the following:

Lifecycle event administrator

Users with the lifecycle event administrator [sn_hr_le.admin] role can administer and configure any part of the application, including any lifecycle event and its associated activity sets and activities. For more information, see Building a lifecycle event.

Activity set manager

Users with the activity set manager [sn_hr_le.activity_set_manager] role can build any lifecycle event and the associated activity sets. You can configure any lifecycle event activity, so long as you are a member of the owning group that owns the activity. For example, if you are a member of the HR owning group, then you can configure any activity that is owned by the HR group, such as an employee task to watch an onboarding video or a fulfiller task to provide relocation assistance.

- Configure a lifecycle event and the associated activity sets
- Configure a lifecycle event activity if you are a member of the associated owning group

Activity writer

Users with the activity writer [sn_hr_le.activity_writer] role can configure any lifecycle event activity, so long as you are a member of the owning group that owns the activity. For example, if you are a member of the IT owning group, then you can configure any activity that is owned by the IT group, such as to set up an active directory account or to set up equipment for a new employee. For more information, see Configure a lifecycle event activity if you are a member of the associated owning group.

Activity reader

Users with the activity reader [sn_hr_le.activity_reader] role can read any lifecycle event and its associated activity sets and activities.

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Using Lifecyle events for enterprise

Once the Lifecyle events for enterprise application is configured, users with the following roles can write and read lifecycle event cases.

Note: A lifecycle event case is an HR case that is fulfilled by a lifecycle event.

Lifecycle event case writer

Users with the lifecycle event case writer [sn_hr_le.case_writer] role can create, manage, and monitor the status of any lifecycle event case.

- Create an HR case for a lifecycle event
- Monitor the status of a lifecycle event case

Lifecycle event case reader

Users with the lifecycle event case reader [sn_hr_le.case_reader] role can read any lifecycle event case.

Install Lifecyle events for enterprise

Install Lifecyle events for enterprise and related applications.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **All Applications** and select **Enterprise Onboarding and Transitions**.
2. Select **Install**.
   Two apps are installed with Enterprise Onboarding and Transitions:
   - Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent]
   - Performance Analytics - Content Pack - Human Resources Lifecycle Events Enterprise Scoped App [com.sn_hr_lifecycle_pa]

Related topics

Business roles

Activate Lifecycle Events for Enterprise

Business roles

Business roles enable you to automatically provision applications to employees through licensed identity provider (IDP) services. If you are subscribed to HR Service Delivery, preconfigured integrations for select systems may be available to use.

Preconfigured integrations for new hire onboarding

The following integrations are available to use with new hire onboarding. These integrations require subscriptions to the relevant spoke in IntegrationHub, as well as the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Note: The lifecycle event for new hire onboarding is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

- Okta integration for new hire onboarding
- Microsoft Entra ID integration for new hire onboarding

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Activation information

The Business Roles [com.snc.businessroles] plugin is automatically activated with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Configure a business role

Create or modify a business role based on job function, geography, and so on.

Before you begin

Role required: sn_businessroles.writer

About this task

Modeled after the organizational hierarchy for applications access, business roles enable you to provision applications to your employees. Depending on their job function, employees need different applications to perform their work. For example, the applications that a product designer requires differs from that of a software engineer. Each business role is mapped to one or more groups, and you can create default business roles and parent-child hierarchies to provision applications.

Procedure

1. Navigate to **All** > **Business Roles** > **Business Roles**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Business Role form

Field	Description
Name	Name of the business role.
Parent business role	Other business roles of which this business role is a member. If the business role has a parent, then the child inherits all the applications that are provisioned to the parent. For example, say you have a parent business role called All Employees that provisions applications A and B, and a child business role called Marketing that provisions applications C, D, and E. When a new hire is assigned the Marketing business role, that user is provisioned applications A through E.
Short description	Description of the business role.
Default	Option to set this record as a default business rule. If selected, the business role is automatically assigned to all new hires that meet the audience criteria for that record. For example, a default business role called Active Users can be used to provision basic applications that users across your entire organization require.
Audience	Defines the conditions or criteria that the new hire must meet for the hiring manager to be able to assign the business role on their behalf.

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Field	Description
	For example, you can use audience records so that one business role is only available for on-site workers and another business role is only available for remote workers. For details on how to configure an audience record, see Audiences.
Active	Option to activate the business role for use.

4. Right-click the form header and click **Save**.
5. If you are integrating with the Okta service, map the business role to one or more Okta groups.
   a. In the **Map to Okta groups** related list, click **Edit**.
   b. From the list of available Okta groups on the left, move the groups that you want mapped to the business role to the list on the right.

      Important: If an Okta group is deleted from within the Okta system, that change will not be reflected in your instance. You must manually delete the record by navigating to **Okta Spoke** > **Okta groups**, as well as remove it from any business role mappings.

   c. Click **Save**.
6. If you are integrating with the Microsoft Azure AD service, map the business role to one or more groups.
   a. In the **Group** related list, click **Edit**
   b. From the list of available groups on the left, move the groups that you want mapped to the business role to the list on the right.

      Important: If a group is deleted from within the Microsoft Azure AD system, that change will not be reflected in your instance. You must manually delete the record by navigating to **Directory Sync** > **Groups**, as well as remove it from any business role mappings.

   c. Click **Save**.
7. Click **Update**.

Update the assign_business_roles_catalog system property

The **assign_business_roles_catalog** system property enables you to assign business roles to users through a catalog item as part of a lifecycle event, and is included with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin. If you are using a custom catalog item with your lifecycle event, you must update the system property with the sys id of that item.

Before you begin

Copy the sys id of the catalog item that you want to use to assign business roles as part of a lifecycle event.

Role required: sn_hr_le_ent.admin

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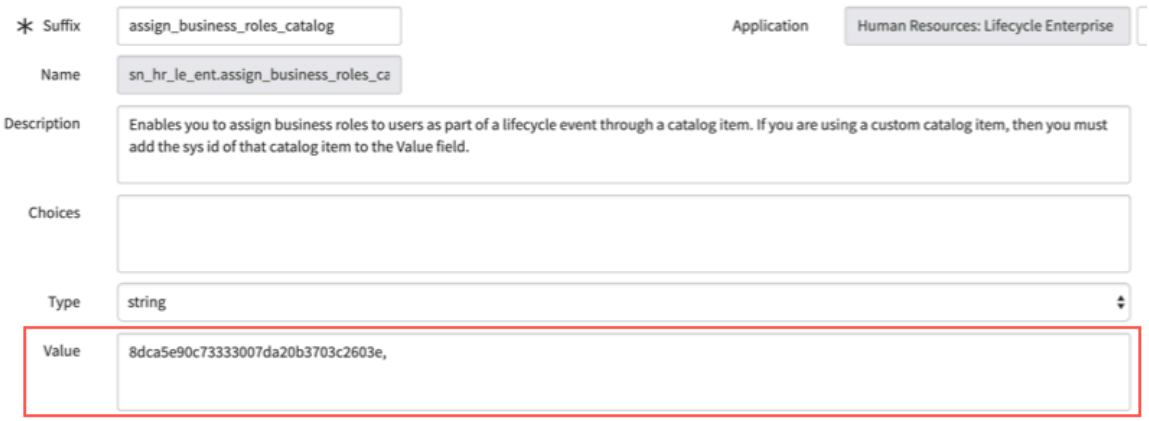
Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The System Properties list is displayed.
2. Open the **sn_hr_le_ent.assign_business_roles_catalog** record.
3. In the **Value** field, add the sys id of the catalog item that will be used to assign business roles as part of a lifecycle event.

   Note: The default value is the sys id of the **Assign business roles to new hire** catalog item that is included as part of the demo data for the lifecycle event for new hire onboarding.



4. Click **Update**.

Lifecyle events for enterprise integrations

Extend Lifecyle events for enterprise capabilities by integrating other application into the journey experience.

Okta integration for new hire onboarding

Automatically provision relevant applications for new hires as part of the onboarding process with the Okta integration. This integration requires the Okta spoke v1.1.1 in IntegrationHub, and is configured to work with the lifecycle event for new hire onboarding that is included as demo data with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Setting up the Okta integration

To set up the Okta integration for new hire onboarding, you must first set up the Okta spoke v1.1.1, next fetch the Okta groups into your instance, and last configure the relevant business roles. For details on how to set up the integration, see Set up the Okta integration for new hire onboarding.

Using the Okta integration with new hire onboarding

Once the integration is set up, you can use it with new hire onboarding. The following components are included in the demo data for your use and example.

Note: The lifecycle event for new hire onboarding is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

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Components installed with Okta integration with new hire onboarding

Component	Name
Lifecycle event activity	Account and Application Access (in the Day One activity set)
HR task template	Groups Assignment for New Hires
Catalog item	Assign business roles to new hire

How the application provisioning works

The application provisioning process works as follows. When an onboarding case is created, the hiring manager receives a task to assign business roles for the new hire. Once assigned, IT then receives a request to supervise the provisioning of those applications. When the provisioning is complete, the new hire should see their applications in the Okta service.

Important: New hires must have a user record in the Okta system in order for their applications to be provisioned to them.

Set up the Okta integration for new hire onboarding

To set up the Okta integration for new hire onboarding, you must first set up the Okta spoke v1.1.1, next fetch the Okta groups into your instance, and last configure the required business roles.

Before you begin

This integration requires subscriptions to the following:

- Okta spoke v1.1.1
- Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin

Note: The lifecycle event for new hire onboarding is included as demo data with this plugin.

Role required: admin

Procedure

1. Set up the Okta spoke v1.1.1.
   For instructions on how to set up the spoke, see Set up Okta spoke v1.1.1.
2. Fetch the Okta groups into your instance.
   For instructions on how to fetch the groups, see Fetch Okta groups.

   Important: If an Okta group is deleted from within the Okta system, that change will not be reflected in your instance. You must manually delete the record by navigating to **Okta Spoke** > **Okta groups**, as well as remove it from any business role mappings.

3. Configure the required business roles.

   Note: The Business Roles [com.snc.businessroles] plugin is automatically activated with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

   For instructions on how to configure the business roles and map them to the relevant groups, see Configure a business role.

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Microsoft Entra ID integration for new hire onboarding

Automatically provision relevant applications for new hires as part of the onboarding process with the Microsoft Entra ID integration. This integration requires the Microsoft Entra ID spoke in IntegrationHub, and is configured to work with the lifecycle event for new hire onboarding that is included as demo data with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Setting up the Microsoft Entra ID integration

To set up the Microsoft Entra ID integration for new hire onboarding, you must first set up the Microsoft Entra ID spoke, next configure the remote directory sync to fetch the groups into your instance, and last configure the relevant business roles. For details on how to set up the integration, see Set up the Microsoft Entra ID integration for new hire onboarding.

Using the Microsoft Entra ID integration with new hire onboarding

Once the integration is set up, you can use the it with new hire onboarding. The following components are included in the demo data for your use and example.

Note: The lifecycle event for new hire onboarding is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Components installed with Microsoft Entra ID integration with new hire onboarding

Component	Name
Lifecycle event activity	Account and Application Access (in the Day One activity set)
HR task template	Groups Assignment for New Hires
Catalog item	Assign business roles to new hire

How the application provisioning works

The application provisioning process works as follows. When an onboarding case is created, the hiring manager receives a task to assign business roles for the new hire. Once assigned, IT then receives a request to supervise the provisioning of those applications. When the provisioning is complete, the new hire should see their applications in the Microsoft Entra ID service.

Important: New hires must have a user record in the Microsoft Entra ID system in order for their applications to be provisioned to them.

Set up the Microsoft Entra ID integration for new hire onboarding

To set up the Microsoft Entra ID integration for new hire onboarding, you must first set up the Microsoft Entra ID spoke, next configure the remote directory sync to fetch the groups into your instance, and last configure the required business roles.

Before you begin

This integration requires subscriptions to the following:

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- Microsoft Azure AD spoke
- Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin

> **Note:** The lifecycle event for new hire onboarding is included as demo data with this plugin.

Role required: admin

Procedure

1. Set up the Microsoft Entra ID spoke.
   For instructions on how to set up the spoke, see Set up Microsoft Azure AD spoke.
2. Configure the remote directory sync to fetch the groups into your instance.

   > **Note:** The Remote Directory Sync [com.snc.remote_directory_sync] plugin is automatically activated with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

   a. Navigate to **Directory Sync** > **Integrations**.

   b. Click **New**.

   c. Fill in the fields on the form.

   Directory Integrations form

Field	Description
Display name	Display name for the integration.
Connection & Credential	Set the value to `sn_azure_ad_spoke.AzureAD`.
Directory provider	Set the value to `Microsoft Azure AD`.

   d. Right-click the form header and click **Submit**.

   e. Click **Publish** to publish the record.

   Publication triggers the fetching of groups into your instance so that you can assign them to different users. Groups are fetched on a scheduled basis. You can view the fetched groups by navigating to **Directory Sync** > **Groups**.
3. Configure the required business roles.

   > **Note:** The Business Roles [com.snc.businessroles] plugin is automatically activated with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

   For instructions on how to configure the business roles and map them to the relevant groups, see Configure a business role.

Sailpoint integration for new hire onboarding

Provide relevant applications for new hires automatically as part of the onboarding process with the Sailpoint integration.

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This integration requires the Sailpoint IdentityIQ for Service Catalog v2 app from the ServiceNow Store, and is configured to work with the lifecycle event for new hire onboarding that is included as demo data with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Setting up the Sailpoint integration

To set up the Sailpoint integration for new hire onboarding, you must install the Sailpoint IdentityIQ for Service Catalog v2 app from the ServiceNow Store. For the installation guide and further information, see SailPoint IdentityIQ for Service Catalog v2.

Note: Make sure to use version 2.0.10 or later.

Using the Sailpoint integration with new hire onboarding

Once the integration is set up, you can use it with new hire onboarding. The following components are included in the demo data for your use and example.

Note: The lifecycle event for new hire onboarding is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Components installed with Sailpoint integration with new hire onboarding

Component	Name
Lifecycle event activity	Account and Application Access in Sailpoint (in the Day One activity set)
HR task template	Assign Roles in Sailpoint

How the application provisioning works

The application provisioning process works as follows. When an onboarding case is created, the hiring manager receives a task to assign roles and entitlements for the new hire. The hiring manager must then manually complete the task. Once assigned, IT then receives a request to supervise the provisioning of those applications. When the provisioning is complete, the new hire should see their applications in the Sailpoint service.

Important: New hires must have a user record in the Sailpoint system in order for their applications to be provisioned to them.

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Case and Knowledge Management

The Case and Knowledge Management application enables you to standardize the documentation, interaction, and fulfillment of employee inquiries and requests, which helps to improve HR efficiency and services over time.

Explore	Configure
Explore HR Case and Knowledge Management features and see how agents use them.	Install and configure HR Case and Knowledge Management features.

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Manage HR Cases	Request HR services
	
HR Agents work on cases.	Employees open HR cases to get help or make requests.
Integrate	**Reference**
	
Integrate with Service Portfolio Management and Digital Portfolio Management.	Get details about components such as fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Case and Knowledge Management

HR Case and Knowledge Management pulls together many HR case related features.

Understanding Case and Knowledge Management

Case and Knowledge Management for the scoped version of HR benefits your enterprise by automating standard HR processes within your organization that support relationships between employees and the HR department.

Who uses HR Service Delivery

HR Service Delivery is used by the enterprise HR department. An enterprise HR department is composed of many areas, such as employee relations, benefits administration, policy enforcement, recruitment and employment, and performance management. The members of a large HR organization typically include:

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- HR specialists who specialize in one or more HR disciplines. For example, the benefits area has specialists in insurance administration, leave and vacation time, and employee stock purchase.
- HR generalists who work with a business group or in a geographical region to assist employees with questions, careers, performance management, and other employee relations requests.
- HR managers who monitor and measure the effectiveness of the HR group in supporting employees across the organization. They also ensure that the enterprise is compliant with federal, state, and local regulations.
- HR systems administrators who configure and maintain systems such as the central employee database, payroll, learning and performance management system, and others, including the Human Resources application.

How you use HR Service Delivery

HR Service Delivery enhances and supports your enterprise. The relationships between your employees, IT, and the HR department are supported in numerous ways:

- Employees can use the HR Service Portal or catalog to submit questions and other requests to the HR department.
- If you use the Connect Support feature, employees can chat with an HR agent who is monitoring the HR chat queue. See Connect Support.

> **Note:** Connect Support will be deprecated. For similar capabilities, please move to Advanced Work Assignment and Agent Chat. For details, see Move from Connect Support to Advanced Work Assignment and Agent Chat.

- HR staff can create, manage, and view HR cases to answer questions and process the requests that employees submit.
- HR managers can run reports and view overview information to monitor and manage work done by the HR department.
- HR and corporate IT administrators can more effectively manage the company HR systems, such as the payroll and performance management systems, through the Enterprise Configuration Management Database (ECMDB).

How you benefit from HR Service Delivery

Your entire organization benefits by using the application in the following ways:

Automates standard HR processes

Several typical HR processes are automated. This automation reduces the number of checklists, email exchanges, and phone calls performed by the HR team.

Improves employee access

Employees access HR services through a service catalog, rather than having to write individual emails, make phone calls, or personally visit HR for each request.

Tracks requests and progress

HR managers use reports and views to help them understand the work their staff is performing to support the company. Employees can see the status of their requests.

Integrates with other services

Human resources processes can include both HR tasks and tasks for other teams, to provide significant service delivery improvements.

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HR Service Delivery terminology

The following terminology is used for the application.

Terminology

Term	Definition
HR Criteria	Way to select groupings of HR and System users based on criteria
HR Services	List of HR Services
HR Topic Categories	List of HR Service Topic Categories
HR Relationships	User relationships with each other
HR Positions	Positions available in company table
HR Assignment Tier Definition	Specifies escalation hierarchy
HR Group Roles	List of groups that have HR group roles
HR Email Scripts	List of all HR email scripts
HR User Roles	List of users who have HR user roles
HR Templates	Templates for Case record creation based on catalog item
Client Role Rules	Specifies the rules to generate client roles
HR Topic	Details List of HR Service Topic Details
HR Service Options	List of HR Services options that affect case creation
HR Departments	Departments available in company table
HR Locations	Locations available in company table
HR Chat Queues	List of HR chat queues
HR Surveys	Surveys used by HR application
HR Links	External links used by HR application
HR Properties	System properties used in HR Application
HR Email Templates	List of all HR-related email templates
HR Knowledge Bases	Knowledge bases used by HR application
HR Knowledge Articles	Knowledge articles used by HR application
HR Notifications	Email notifications used by HR application
HR Service Catalog Categories	Service catalog categories used by HR application
HR Service Catalog Items	Service catalog items used by HR application
HR Document Templates	Document templates for document content used in HR application
HR Groups	Groups used by HR users
HR Skills	Skills available to company users
HR Roles	Roles used by HR users

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Terminology (continued)

Term	Definition
HR Benefit Provider / Plans	Benefit providers and plans used by HR Benefits service
HR Benefit Type	Benefit types used by HR Benefits service
Disciplinary Issue Types	Disciplinary issue types used by HR Employee Relations service
Disciplinary Warning Types	Warning types used by HR Employee Relations service
HR System Report Frequencies	System Report Frequencies defined for HR Systems Service
HR System Report Types	HR System Report types used by HR System service

Configuring Case and Knowledge Management

Install the plugin and configure features to enable HR agents to work on requests.

Using guided setup to implement Case and Knowledge Management

Guided setup provides a sequence of tasks that help you configure Case and Knowledge Management on your instance. To open guided setup for Case and Knowledge Management, navigate to **HR Administration** > **Guided Setup**.

For more information, see Guided setup for HR Service Delivery.

Related topics

Components installed with Case and Knowledge Management

Activate Case and Knowledge Management

You can activate Human Resources Scoped App: Core [com.sn_hr_core] if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin
Role required: admin

About this task
Human Resources Scoped App: Core allows you to standardize the documentation, interaction, and fulfillment of employee inquiries and requests.

It activates these related plugins if they are not already active.

Plugins for Human Resources Scoped App: Core

Plugin	Description
Human Resources Scoped App: Security [com.snc.hr.scoped_security]	Provides HR security.
Human Resources Scoped App: Integrations [com.sn_hr_integrations]	Provides HR Integrations.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Components installed with Case and Knowledge Management

Guided setup for HR Service Delivery

Run the guided setup to complete the relevant tasks for getting started with the HR Scoped application.

Before you begin

Role required: sn_hr_core.ws_admin and sn_hr_core.admin

About this task

Guided Setup supports domain separation at the global and at the parent or child levels. You can run the guided setup separately for each domain within HR Service Delivery.

To learn more about domain separation, see Domain Separation and HR Service Delivery.

Procedure

1. Navigate to **All** > **HR Adminstration** > **Guided Setup**.
   Alternatively, you can click the **Guided setup** related link in a specific domain in **Workspaces** > **SP Admin Workspace**.

   Note: **Guided Setup-Legacy** allows you to run guided set up at a global domain only. Use the new **Guided Setup** instead.

2. Click **Continue**.
   The HR Guided Setup page appears.
3. Expand any category to view detailed status and related tasks.
   a. Click **Start** to set up each task or activity within a category.
   b. Click **Mark as complete** after you are done with the set up.

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HR Guided Setup

Category	Description
HR Users	Set up your HR team's groups, roles and tier escalation definitions to enable where HR cases get delivered in the HR application, set up rules of escalations, and define role assignments. ○ Set up groups and manage members within those groups, and what skills assignments can be handled by those groups. ○ Set up HR roles to control access to functions in the HR application. ○ Set up group's roles. ○ Set up individual user's roles. ○ Set up client role rules for non HR team users to be able to access HR Services. ○ Set up HR tier escalation rules.
HR Company	Set up your company's departments, locations, positions and skills to use within HR application that are generally to be set in a user's profile. ○ Set up departments for user's profiles. ○ Set up locations for offices, and user's profiles. ○ Set up positions for user's profiles. ○ Set up skills for user's profiles in order to route specific HR cases to the correct group or individual.
HR Chat and Email Configuration	Set up your HR notifications, email, and chat settings. ○ Set up HR chat queue so that users can communicate to HR staff via chats. ○ Set up email notifications to define who receives what content when process related changes occur. ○ Set up email templates used in notifications. ○ Set up email scripts used by templates.
HR Application Configuration	Set up your applications with components that define the operation and available data groupings: ○ Set up criteria to define groups of users based on conditions, allowing for pre defined group actions. ○ Set up Document Templates to define text and formats that can be used for HR application functions such as signed documents and employee verification letters. ○ Set up external links to manage URL based content available to users. ○ Set up properties that adjust runtime behavior of the HR application. ○ Set up relationships between users. ○ Set up surveys to define who receives and what type of information is captured from users during case management.
HR Knowledge Management	Knowledge Management helps you to capture and share ideas, experience, and information that your users collectively possess. Effective use of Knowledge Management improves efficiency, quality of service, and customer satisfaction. Complete the activities in this category to configure your organization's knowledge management process.

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Category	Description
	○ Set up your knowledge bases to add in HR content. ○ Set up your knowledge articles that serve as your HR content. ○ Set up your knowledge articles as an import to pull in a library of content into articles.
HR Service Catalog	Service catalog helps to present the services that your organization offers to employees. Complete the activities in this category to structure and build the services that the employees can request through the service catalog. ○ Set up service catalog categories to help categorize the HR cases and requests. ○ Set up service catalog items that collect information from users of your application. ○ Set up links between service catalog items and knowledge articles and attachment forms displayed in the service portal.
HR Service Configuration	HR Services are a collection of user selectable Service Catalog items, but they contain behavior options, categorizations, pre-filled templates for HR case management and other attributes. ○ Set up service catalog categories to help categorize the HR cases and requests. ○ Set up HR service definition, including links to Service Catalog Record Producers, Templates, Case Options, and Fulfillment Instructions. ○ Set up Service Options that define case creation behavior options for use in this service. ○ Set up Topic Detail for classifying this service. ○ Set up Topic Category for classifying this service. ○ Set up Service Templates for what fields will get pre filled for a service during a case creation.
HR Service Definitions	HR Service Definitions tables that contain data used by the HR Services. ○ Set up Benefit Providers used by your company. ○ Set up Benefit Types used by your company. ○ Set up Disciplinary Issue Types used by your company. ○ Set up Disciplinary Warning Types used by your company. ○ Set up Operational Report Frequency values used by your company. ○ Set up Operation Report Types used by your company.

4. Click **Complete** after you have finished all the tasks within all categories.

HR Administration

Administer the Case and Knowledge Management application to improve HR efficiency and make it easier for employees to get the services they need.

Note: To use guided setup to help configure HR Service Delivery on your instance, navigate to **HR Administration** > **Guided Setup**. For further information on how to use the guided setup interface, see Using guided setup.

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HR properties

HR properties control the behavior of HR Service Delivery.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Properties**.
   Some HR properties are found under **sys_properties.list**.
2. Configure the HR properties, as appropriate.

HR Properties form

Property	Description
sn_hr_core.hr_profile_default_fields	Fields that appear on the Generate HR Profiles page. You can add fields from the sn_hr_core_profile column, but use commas to separate the fields.
sn_hr_core.hr_email	Enter the default email address for general HR inquiries.
sn_hr_core.hr_phone	Enter the default phone number for general HR inquiries.
sn_hr_core.hr_profile_editable_fields	Fields that users can edit themselves about their employee profile.
sn_hr_core.profile.max.tries	The maximum number of attempts allowed before the application exits when creating a user.
sn_hr_core.hr_vip_default_priority	The default priority on cases that the **Opened for** and/or **Subject person** is tagged as a VIP.
sn_hr_core.impersonateCheck	Check **Yes** (true) to prevent any user impersonating another user from viewing HR information. **Note:** Even if the logged in user has HR access and impersonates another HR user with the same access, HR information is not visible.
com.snc.signaturepad.retrieveSignature	Check **Yes** to enable signature retrieval and allowing users to save their digital signatures for reuse. If true, retrieves the latest signature image for a user and show it by default when the user navigates to the signature pad.
sn_hr_core.log	The level of detail for system logs. The valid values are: ○ Info: Least amount of detail ○ Warn: Default ○ Debug: Most amount of detail
sn_hr_core.rollup_work_notes	Check **Yes** to have work notes from a task also appear on the case.
sn_hr_core.duplicate_hr_case_timeout	The number of days that must pass before a duplicate case warning appears when an HR case is created for the same HR service and subject person in HR Agent Workspace. The base system value is three (3) days.

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Property	Description
	For example, if an agent creates an HR case for a General Benefits Inquiry (HR service) for Abel Tuter and another General Benefits case is created in HR Agent Workspace within three days, a message appears notifying the user of a potential duplicate case. A list of similar cases also appears. The agent can continue to create a new case or cancel. **Note:** This property only affects possible duplicate HR cases for the same HR service and subject person in HR Agent Workspace. For more information, see .
sn_hr_core.inbound_email	This parameter determines if an email to HR is converted into an HR case. ○ Yes: Create an HR case from email. ○ No: Do not create an HR case from email.
sn_hr_core.sync.exclusion_fields.profile	Specifies which fields on the HR profile (sn_hr_core_profile) table you don't want to synchronize with the User (sys_user) table. For example, specify fields that should not be overwritten as they are already synchronized with an external application.
sn_hr_core.sync.exclusion_fields.sys_user	Specifies which fields on the User (sys_user) table you don't want to synchronize with the HR profile (sn_hr_core_profile) table (as a comma separated list). For example, specify fields that should not be overwritten as they are already synchronized with an external application.
sn_hr_core.itext7.pdf_conversion	Activate this property to use the iText7 for your document templates for PDF conversion, pre-fill values, and merge signatures into your documents.
sn_hr_core.reclassify_default_transfer	Determines how you want your instance to behave when you transfer an HR case to another case after an upgrade. Valid entries: ○ true: Use the default transfer case to use the standard method. The HR case number changes when transferring an HR case from one HR service to another. Both HR case numbers appear on the HR case for reference. ○ false: Use the reclassify method to transfer an HR case. The HR case number does not change after transferring an HR case from one HR service to another. **Note:** For more information, see Transfer an HR case.
sn_hr_core.include_elevated_roles	Checks for logged in users that have roles with elevated privilege before granting access. Valid entries: ○ true: Check if logged in user has role with elevated privilege before granting access. ○ false: Do not check if logged in user has role with elevated privilege before granting access.

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Property	Description
sn_hr_core.restrict_query.limit_inactive	Limits access to cases, through inactive tasks, based on a time limit in months. If the property is left empty, there will be no limit on the cases that are displayed. The default value to **12**. Depending on your business requirements, you can set this property to a value lesser than 12 months. This might improve the performance experience of your instance. **Note:** You might not get a benefit out of this property in one of the following cases: ○ Property is unavailable in the system. ○ Property is left empty. ○ Property is set to a positive value, but the number of inactive case tasks within the time limit is large.

3. Click **Save**.

Configure how HR cases are created

Modify how search results for an employee appear and configure the default HR case creation form.

Before you begin

Role required: sn_hr_core.admin

About this task

HR case creation has multiple steps:

- Search for an employee or related case.
- Create an initial HR case.
- Complete the details of the case.

Using the **Case Creation Configuration** form you can control the information returned from a search and the required fields when creating an initial HR case.

Note: Zing text search is used to search on indexed fields in the User [sys_user], HR Profile [sn_hr_core_profile], and HR Case [sn_hr_core_case] tables. Refer to Zing text indexing and search engine.

Procedure

1. Navigate to **All** > **HR Administration** > **Case Creation Configuration**.
2. On the form, modify the fields as appropriate.

Case Creation Configuration form

Field	Description
Page size	Determines the maximum number of search results for each page break when using the **Search for Employee** form.

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Field	Description
	Note: The default is 10. If there are more than 10 search results, the form divides the results into chunks of 10. It does not limit the search results to 10.
Minimum input length	Specifies the minimum number of characters that must be entered in the **Search for Employee** form to return results.

3. Modify the default search behavior when searching by employee.

Modify search behavior

Field	Description
Display table	Displays employee information. Search uses the **HR Profile [sn_hr_core_profile]** table when displaying information for an employee. This field is read-only.
Limit users on search	Option for adding filter conditions for searching for a user. For example, you could add a filter for only active users.
Additional display fields	Option for adding fields to help narrow a user search. The base system configuration provides fields for the user department, user employee number, and user location when applicable.
Links	A URL link configured in **Link Generator**. See Link generator for HR Service Delivery.
User field	Read-only field that determines which users are displayed for a search the information displayed about them.
Force partial search	Option for providing the ability to enter a partial name to return search results. For example, when searching for Abraham Lincoln, users could enter `Abra` to return search results. Selecting this option also helps provide consistent search results when creating an HR case. **Note:** If this option is not selected, users must enter the whole word to match.
Allow skipping verification	Option for providing the ability to enter or skip the employee name or case number when creating an HR case. For more information, see Create an HR case.

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Field	Description
	For example, if your company receives a complaint from an external individual or an anonymous user, providing this option enables an HR agent to create a case without having to enter an employee name or case number.

4. In the **Case Search** related list, modify the default search parameters when searching by case number.

Modify search parameters

Field	Description
Case table	Read-only field that contains the **HR Case [sn_hr_core_case]** table used for case search purposes.
Limit cases on search	Option for adding filter conditions to your search. For example, you could add a filter to search only for active cases.
User fields	Option for adding user fields to appear during a case search. The base system configuration provide fields for subject person, opened for, opened by, and watch list values when applicable.

5. In the **Employee Information** related list, modify the fields that appear in the **Employee Information** section of the **Case Creation** form.

Modify fields

Field	Description
Left fields	Determines the fields that appear on the left side of the **Employee Information** section of the **Case Creation** form. The base system configuration displays fields for the user name and user employee number.
Right fields	Determines the fields that appear on the right side of the **Employee Information** section of the **Case Creation** form. The base system configuration displays fields for the user email and user ZIP or postal code.

6. In the **Case Creation** related list, determine the default fields that appear in the **Case Creation** form.

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Determine default fields

Field	Description
Task create table	Read-only field that contains the **HR Case [sn_hr_core_case]** table used to show default case creation fields.
Limit services	Option for creating service conditions that determine the HR services that are available for specific employees. For example, you may not want to offer 401(k) benefits to employees outside of the United States. **Note:** HR services work with HR criteria to select the correct HR service for the subject person on the HR case. When a subject person is selected for an HR case, these fields determine the HR services available. When no subject person is selected, only services with no criteria are shown.
Fields minimum input length	Specifies the minimum number of characters that must be entered in a user search input field on the HR case creation form to return results. The value in this field affects searches in the following fields: ○ Subject person ○ Opened for ○ Opened by ○ Assigned to ○ Collaborators ○ Watch list A search request is not executed until the minimum number of characters are entered. A hint shows the minimum number of characters that must be entered to execute the search. The default value is 0. If the default value is used, a search is executed for each character entered. **Note:** Placing a value in this field prevents a search from executing for every character entered that does not meet the minimum. The default value is 0

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Field	Description
Left task fields	Determines the fields that appear on the Case Details Section (CDS). The base system provides the **COE** field, which is non-configurable.
Right task fields	Determines the fields that appear on the right side of the CDS. The base system configuration displays the **Opened for**, **Subject person**, and **HR service** fields. **Note:** Removing the **Subject person** field from the form or leaving it empty limits the HR services available to employees without associated HR criteria.
Bottom task fields	Determines the fields that appear on the bottom of the CDS. The base system configuration displays the **Work notes** field.

7. In the **Case Creation Service Configurations** section, configure the HR case creation form for individual HR services.
   For more information, see Configure the HR case creation form for an HR service.
8. Save your modifications.
   - To save the modifications and remain on the form, click **Save**.
   - To save the modifications and exit from the form, click **Update**.

Application view of HR catalog

The **Application View** provides an aerial view of your HR catalog. The **Application View** allows you to view your catalog with all categories and items and ensure that it is set up correctly.

Before you begin
Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Application View**.
   On the left side of the page, a list of application view categories and the number of records in each display. The main section of page displays the all application view probes and the number of records in each.
2. To view a list of records for application probe, click the down-arrow next to records.
   Clicking a record takes you to the record.
3. Click New Probe to report on a table or setup aspect in the HR Service Delivery system.

HR notifications

Notifications are reminders that are created using email templates and sent out for **Lifecycle Event Activities** and **HR Services**.

HR case writers or Lifecycle Event activity writers can set up reminder notifications on HR tasks and task templates to remind the **Assigned to** person about due dates. Reminder emails are created using email templates. See Add or modify email content for notifications.

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HR notifications for HR services are recurring and are a one-time for Lifecycle Events.

Note: To view other notifications, you can navigate to **System Notification** > **Notifications**.

Process

- Create or edit email content. See Add or modify email content for notifications.
- Create or edit an HR task template. See Configure an HR task template.
- Create or edit an HR Service. See Configure an HR service.
- Create or edit an HR service activity. See Configure a service activity for an HR service. Ensure the HR task template selected has the **Set reminder** box checked.

Note: Notifications for HR Services are only sent to the **Assigned to** person for the HR task.

Add or modify email content for notifications

Use the **Email Content** form to create notification templates to alert the assigned to of an HR task when a due date is approaching.

Before you begin

Roles required: sn_hr_core.case_writer, sn_hr_le.activity_writer
You must have the HR Case Writer [sn_hr_core.case_writer] or Lifecycle Event Activity Writer [sn_hr_le.activity_writer] role to select an **Email Content** template. For Lifecycle Events, you must have the Lifecycle Event Activity Writer [sn_hr_le.activity_writer] role to create or edit an HR task template for Lifecycle Events.

When setting up notifications, an email template must be created. The base system provides an email template that can be used as a model.

Email notifications can be sent for HR tasks with due dates and can be configured:

- To be sent relative to the due date.
- To be sent at intervals until the task is completed or skipped.
- With customized content.

Procedure

1. Navigate to **All** > **HR Administration** > **Email Content**.
2. From the **Email Contents** list, select **New** or an existing email template to edit.
3. Enter or edit the fields on the **Email Content** form.

Field	Description
Name	Enter or edit the name of the email template.
Type	Select the type of notification: ○ Activity Notification ○ HR Task Reminder
Subject	Enter or edit the subject line of the reminder notification. The text appears in the subject line of the email sent as a reminder notifica tion.

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Field	Description
Message HTML	Enter or edit text that is the main body of the email notification. Use the formatting tools to format the text such as bold, italic, underline, font styling, justification, bullets, insert image, and numbers.
- +	Click the - to delete lines from the message area or + to add lines.
Select variables	This section provides a list of variables that can be used in the email template. Variables pull information from a table so information can be repeatable and customizable depend ing on the type of notification selected. The variables that appear depend on the **Type** field. ○ Activity Notification: HR Lifecycle Events Case [sn_hr_le_case] ○ HR Task Reminder: HR Case [sn_hr_core_ case]

4. Select **Save** to save the record and remain on the **Email Content** form.
   Or, select**Submit** or **Update** to return to the **Email Contents** list.

Email notification layout for HR Service Delivery notifications

Use the email notification layout and template shipped with the Employee Experience Foundation (com.snc.sn_ex_emp_fd) plugin to deliver HR notifications. Apply the layout to email notifications to elevate the look and feel, and deliver branded notifications.

The Employee Experience Foundation (com.snc.sn_ex_emp_fd) plugin is installed as a dependent plugin with Employee Center or Employee Center Pro. However, you can still independently install the plugin from ServiceNow Store.

By default, the following email notifications use the Employee notification layout. You can choose to modify the email body or use them as provided.

Email notifications for HR Service Delivery

Notification name	Used for	Recipient
HR case opened **Note:** By default, this notification is in **False** state. Set it to **True** to start using this email notification.	Sends an email notification when an HR case is created.	Opened for
HR case closed	Sends an email notification when an HR case is marked as complete.	Opened for, Watch list

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Email notifications for HR Service Delivery (continued)

Notification name	Used for	Recipient
Note: By default, this notification is in **False** state. Set it to **True** to start using this email notification.		
Comment left on HR case **Note:** By default, this notification is in **False** state. Set it to **True** to start using this email notification.	Sends an email notification when comments are added to an HR case.	Opened for, Watch list

Important: These email notifications are automatically set up for a new user of HR Service Delivery.

If you are an existing user of HR Service Delivery on a release prior to San Diego, upgrade to Employee Center or Employee Center Pro or install the Employee Experience Foundation plugin from ServiceNow Store to start using these email notifications.

Collect employee input

Collect employee input without creating additional case records or adding new fields to existing tables with employee forms.

Employee forms are questionnaires built using the survey designer that you can use in HR tasks to verify or update information from employees. The information collected can be mapped directly to fields on a target table. You can also use HR criteria to query answers for use in downstream processes, such as for lifecycle event activities.

How to collect employee input

Employee forms enable you to collect or verify information from employees. To use them, you must first create the employee form. Employee form questionnaires are built using the survey designer, and you can map questions from the employee form to corresponding fields on a target table. The mappings allow you to auto-populate information onto the employee form, and that information can be read-only or editable. If editable, the updated values will be pushed back to the corresponding table fields.

For more information, see Create an employee form.

Once created, you can use the employee forms in HR tasks or HR task templates.

Note: Make sure that the HR task type is set to **Collect employee input**.

- Adding an HR task to an HR case
- Configure an HR task template

You can also use HR criteria records to query collected answers for use in downstream processes, such as for lifecycle event activities. Because questions on the employee form

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are built using the survey designer, the answers collected are saved to the Metric Result [asmt_metric_result] table. You can use HR criteria records to query answers from that table to determine whether an activity should trigger for a particular user. For example, if on an invention disclosure form, the new hire answers yes, then you can use that answer to trigger the creation of another task to collect details on the invention.

For more information, see Create an HR criteria record for an employee form.

Example: Gathering intellectual property information

As part of the onboarding process, you want to ask new hires if they have any inventions to disclose. If they do, you want to gather details on the invention. To collect this information, you need to create an employee form, which is a questionnaire built using the survey designer. The questionnaire can include:

- New hire's manager
- New hire's business unit
- Do you have inventions to disclose?
- If yes, provide details on your invention.

After you create the employee form, you can use the form in HR tasks to collect the information you need. The following GIF shows an example of an HR agent creating a collect employee input task for an employee, Eva Seahorn, as part of an HR case.

The employee can then provide that information when they receive the to-do. The follow GIF shows an example of the employee, Eva Seahorn, then completing the collect employee input to-do in the Employee Center.

Collect employee input error handling

If an error occurs when updating the employee form, a work note will be added to the HR case and HR task forms. Information not updated must be manually updated by the HR agent, and you can navigate to **HR Administration** > **Employee Form Errors** for further details on the error.

Create an employee form

Create or modify an employee form so that you can collect employee input. Configuration of the employee form is a three-part process. First, create the employee form record. Second, use the survey designer to build one or more questions for the employee form. Third, you can map questions from the employee form to corresponding fields on a target table.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Form**.
2. Click **New**.
3. Fill in the fields on the form.

Employee Form

Field	Description
Name	Name of the employee form.
Description	Description of the employee form.

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Field	Description
Active	Option to activate the employee form for use.

4. Right-click the form header and click **Save**.

   The **Form Designer** button appears.

5. Click **Form Designer** to open the survey designer in a new window.
6. Use the survey designer to build questions for your employee form.

   Note: If you plan to map the question to a table field, make sure that the data types match. Mapping is supported for the following question types:

   - Boolean
   - Choice
   - Date
   - Date/Time
   - Number
   - String
   - Reference

   For further details on the different question types, see Survey designer elements.

   Note: There are several limitations with native mobile screens, including custom and rating data types, validation scripts, read-only questions, and additional information fields. See this KB article for more details.

   Example

   The following GIF shows an example of a user building a reference question and a boolean question in the survey designer.

   Note: Make sure to provide each question a name so that you can more easily identify the question when creating mappings or HR criteria records.

7. After building your questions, click **Save and Publish**.
8. Return to and reload the employee form.

   The **Add Mappings** field appears on the employee form.

9. If you want to map one or more questions to fields on a table, fill in the following new fields on the form.

   Employee Form

Field	Description
Add Mappings	Option to map questions from the employee form to fields on a target table. This field appears after you save and publish at least one question in the survey designer.
Table	Select the table that the employee form is mapping to. This field appears when **Add Mappings** is selected.

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Field	Description
Conditions	Use the condition builder to identify one record on the table to access. Make sure that the result is a match to a single record. This field appears when **Add Mappings** is selected. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

Example

For example, you can map an employee form to the HR Profile [sn_hr_core_profile] table with the following condition:

[User] [is (dynamic)] [Me].

The result is that the logged-in user's HR profile record is accessed for mapping.

10. To map one or more questions from the employee form to fields on the target table.

    a. In the **Employee Form Field Mappings** section, click **New**.

    b. Fill in the fields on the form.

Employee Form Field Mapping form

Field	Description
Employee form	This field is automatically set to the name of the employee form.
Table name	This field is automatically set to the table that the employee form is associated with.
Question	Question from the employee form that is being mapped from. **Note:** Make sure that the data type matches that of the target field.
Field	Field that is being mapped to **Note:** Make sure that the data type matches that of the source question.
Read only	Option to make the question read-only. If selected, the user can read but not update the field value on the employee form. This field appears after you select a question in the **Question** field.

Example

For example, you can map a question for the user's manager to the corresponding field on the User [sys_user] table. When the user views the employee form in an HR task, they will

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see their manager's name filled in for that field. Because it is marked as read-only, the user will be able to read but not update that field.

c. Click **Submit** or **Update**.

d. Repeat the process as needed.

11. Click **Update**.

What to do next

You can use the employee form in task forms to collect employee input from users.

The following GIF shows an example of an HR agent creating a collect employee input task for an employee, Eva Seahorn, as part of an HR case.

The follow GIF shows an example of the employee, Eva Seahorn, then completing the collect employee input to-do in the Employee Center.

Create an HR criteria record for an employee form

Create an HR criteria record for an employee form based on the employee answers stored in the Metric Result [asmt_metric_result] table.

Before you begin

Role required: sn_hr_core.admin

About this task

Answers from the employee form are stored in the Metric Results [asmt_metric_result] table. You can query the answers using HR criteria. For example, if on an invention disclosure form, the new hire answers yes, then you can use that answer to trigger the creation of another task to collect details on the invention.

Procedure

1. Navigate to **All** > **HR Administration** > **HR Criteria**.
2. Click **New**.
3. Fill in the fields on the form.

HR criteria form

Field	Description
Name	Name of the HR criteria record.
Description	Description of the HR criteria record.
Active	Option to activate the HR criteria record for use.

4. Right-click the former header and click **Save**.
   The **Conditions** section appears.
5. In the **Conditions** section, click **New**.
6. On the HR Condition form, enter the following field values.

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HR condition form

Field	Value
Name	<Name for the HR condition>
Table	Metric Result [asmt_metric_result] table
Employee form	Select the employee form you want to query. This field appears when the Metric Result table is selected in the **Table** field.
Condition	Select the question and answer from the employee form you want to query. For the question, provide the following condition: [Metric] [is] [<Question>] For the answer, provide the following condition based on the value type: ○ **[String value] [is] [<Answer>]** ○ **[Reference value] [is] [<Answer>]** ○ **[Actual value] [is] [<Answer>]** **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Active	Selected
User column	Assigned to

7. Click **Submit**.
8. On the HR Criteria form, click **Update**.

What to do next

Depending on the case type, the HR criteria record will use the following survey instance:

- If you are using the HR criteria record with a lifecycle event, it will use the survey instance that is associated with the lifecycle event case.
- If you are using the HR criteria record with any other HR case, it will use the latest survey instance.

HR criteria

HR criteria defines the audience for HR content, services, or cases. You can make information available to or create an HR case for specific groups, individuals, or to all employees using HR criteria.

HR criteria uses the standard platform condition builder to support complex conditions for controlling the Employee Center content that employees see when logged in. For more information, see Condition builder.

HR criteria contains a script include that can be called from an advanced User criteria.

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Note: Complex conditional statements for scripted User criteria applied to a knowledge base with large amounts of documents can cause performance issues. Standard (non-scripted) User criteria is recommended for securing knowledge documents.

See User criteria for Service Portal.

HR criteria define conditions that are evaluated against HR tables. Once HR criteria is defined, you can filter what is available to those users.

HR criteria helps group people using a condition builder on any table. User criteria is used across the ServiceNow platform to filter catalog items, Service Portal widgets, and knowledge articles. User criteria filters users based on role, department, group, location, or company. User criteria can be created when HR criteria is created. HR criteria:

- Filters content on the Employee Center.
- Applies only to **Subject person**. HR criteria filters **HR services** based on the **Subject person** during case creation or transfer.
- Filters **Lifecycle Event Activities** in the **Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events]** plugin.
- Selects document template for HR cases.
- Selects users when creating bulk HR cases.

For Lifecycle Events, activities have associated HR criteria that determines when to trigger an activity for the subject person selected on the Lifecycle event case. This step helps to personalize the workflow for the subject person.

Note: For HR Catalog Items (record producers), ensure **Use "User Criteria" to define access to catalog items and categories** is set to **Yes** under **Service Catalog** > **Catalog Administration** > **Properties**. Verify that this field is checked **Yes**.

You can use user criteria for Knowledge and Service catalog access. Add a reference column to the User Criteria [user_criteria] table when columns are required for the criteria query.

If you use HR criteria for Knowledge and Service catalog access, ensure:

- Referenced columns are correctly indexed.
- Conditions that can cause performance issues (starts with) are not used.
- Knowledge document searches and use cases are performance tested with instances that are similar to what is used in production.

When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

Configure an HR criteria record

Create or modify HR criteria to define an audience for HR content, services, or cases.

Before you begin

Role required: sn_hr_core.admin

HR criteria uses the standard condition builder. For more information, see Condition builder.

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Procedure

1. Navigate to **All** > **HR Administration** > **HR Criteria**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

HR Criteria form

Field	Description
Name	Name of the HR criteria record.
Description	Description of the HR criteria.
Active	Option to activate the HR criteria for use.
Related user criteria	You can create user criteria from HR criteria. User criteria is used across the ServiceNow platform to filter catalog items, HR Service Portal widgets, and knowledge articles. **Note:** This field remains blank until you create User criteria. The **Create User Criteria** link appears after you click **Save**.

4. Click **Save**.
   You can create User criteria based on HR criteria. User criteria is used across the ServiceNow platform to filter catalog items, HR Service Portal widgets, and knowledge articles.
5. Select the **Create User Criteria** related link.
   a. Click **New** or **Edit** to open an existing record.
   b. Fill in the fields on the form.

HR Condition form

Field	Description
Name	Name of the HR condition.
Table	Table that the HR condition is associated with. The table HR criteria conditions are defined from. For example, select the **HR Profile (sn_hr_core_profile)** table to select a field and define a condition.
Active	Option to activate the HR condition for use.
User column	Together with the **Table** field, filters users when evaluating a condition for a user. To create User criteria, select **User**.

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Field	Description
	Note: Depending on the table selected, this field can be required to match conditions. When the User [sys_user] table is selected, this field is mandatory otherwise a false positive can occur since the lookup is not associated to an expected user.
Condition	The field from the table selected and a value that defines the condition. Use conditions to define your HR criteria. For example, to define a single condition, you can select the following from the **HR Profile (sn_hr_core_profile)** table: ▪ **Home country** ▪ **is** ▪ **United States of America** This condition selects all employees who have a home country of the United States on their HR profile record. You can define multiple conditions for an HR criteria using the **And Or** condition filters. When using **And** each condition must be met. When using **Or** any condition that is met is used. For more information, see Condition builder . **Note:** When you use multiple conditions, only the records that match all of the conditions are used. When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global . **Note:** For more information, see Filters .

Example

For example, to create a condition to show the link for new hires and contractors, select:

- Table: Client Role Rule [sn_hr_core_client_role_rule]
- Condition: **[Role] [is] [sn_hr_core.hrsm_new_hire] AND [Role] [is] [sn_hr_core.hrsm_contractor]**

After creating a condition, a clickable link appears with the number of matching records. Click the link to see if the correct users are being selected based on the condition.

c. Click **Submit** or **Update**.

6. In the **Conditions** section, you can add more conditions to define the HR criteria.

HR surveys

HR Surveys let users rate their satisfaction with HR case resolution, and provide management with feedback to improve HR processes.

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One predefined HR survey is provided: HR Request Satisfaction Survey. HR administrators and HR managers can edit HR surveys and the associated trigger conditions.

The HR Request Satisfaction Survey is triggered randomly for 50% of closed HR cases. Users receive an email with the survey link after they accept the resolution or when the HR case is closed incomplete.

HR managers and administrators can review responses by question and see a scorecard. Comments entered by users provide feedback that can be used to improve the performance of HR case management. The following survey options can be configured.

- The look and feel of the questionnaire, for example, by adding the company logo.
- Conditional questions that appear when users answer other questions in a certain way.
- The trigger condition, for example, to send it for every case or to a lower percentage of users.

With trigger conditions, the system generates a survey instance each time a specific action occurs on a given table, such as when an HR request closes. You can choose to send a survey every time the condition is met. Or, you can set a probability for the system to send a survey at random when the condition is met. Trigger conditions are ideal for sending surveys to measure satisfaction with a recent experience, such as closing an HR request.

When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

For more detailed information about working with surveys, trigger conditions, and survey questions, see Get started with Survey Management.

Add or modify an HR survey

You can modify the predefined HR satisfaction surveys to suit the needs of the organization, and create HR surveys.

Before you begin

Role required: sn_hr_core.admin or sn_hr_core.manager

About this task

For example, to create an HR survey to gauge the employee satisfaction of HR processes or services.

The following steps describe how to work with survey questions in the Survey Definition form. You can also click **Survey Designer** to open the survey and its questions in the survey designer. When you save the survey, the survey definition is automatically added. See Survey designer.

Procedure

1. Navigate to **All** > **HR Administration** > **Surveys** > **All HR Surveys**.
2. Click **New** or open an existing survey.
3. Complete the form.

   Note: Some fields were eliminated for HR. See Modify a survey definition for more information.

4. Click **Submit**.

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Add or modify HR survey categories and questions

When an HR survey definition is created, a survey category is automatically added. You can create questions that are associated with this category or define another category for questions.

Before you begin

Role required: admin, hr_admin, or hr_manager

About this task

For example, the HR Request Satisfaction Survey has one category, with four questions about satisfaction with the HR request process. You can define another category to ask about satisfaction with the HR agent who handled the case, or you can add more questions to the existing category.

The following steps describe how to work with survey questions in the Survey Definition form. You can also click **Survey Designer** to open the survey and its questions in the survey designer.

Procedure

1. Navigate to **All** > **HR Administration** > **Surveys** > **HR Surveys**, and open the survey to add questions.
2. In the **Metrics Categories** related list, complete one of the following actions.

To	Do this
Add or edit questions in an existing category	Click the category name.
Add a category and questions	Click **New**. Enter the category name and description, right-click the form header, and click **Save**.

   The Survey Category form that appears includes the **Assessment Metrics** related list, which contains any questions that are already defined.
3. To edit a question, complete the following steps.
   a. Click the question text and edit the fields on the form.
   b. Click **Update**.
   c. If required by the question type, add definitions in the **Assessment Metric Definitions** related list.

      Example
      For example, Likert and numeric scale data types require the scale metric definitions.
4. To add a question, complete the following steps.
   a. Click **New** and complete the form.
   b. Right-click the header and click **Save**.
      Additional fields appear based on the selected data type. For example, if you select **Choice**, you must enter the scale definition.

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c. If applicable, add definitions in the **Assessment Metric Definitions** related list.

Example
For example, the Choice data type requires that you enter the choices.

5. Click **Update**.
The Survey Definition reopens.

Publish a new HR survey

Publish a new survey so users can complete it.

Before you begin
Role required: sn_hr_core.admin, or sn_hr_core.manager

About this task
After a survey is published, you can edit it and it remains published. The **State** field on the Survey Definition form indicates whether the survey is published.

Procedure
1. Navigate to **All** > **HR Administration** > **Surveys** > **All HR Surveys**, and open the survey to publish.
2. Click **Publish**.

Result
If there are assigned users, the system automatically generates a survey instance. You can click **Send Invitations** to send a notification to the assigned users with a link. Assigned users can also navigate to **Self-Service** > **My Assessments and Surveys** to take the survey.

Note: A survey cannot be returned to the **Draft** state after it has been published. You can, however, deactivate a survey by clearing the **Active** check box.

What to do next
If you want employees to receive a link to a survey, such as the HR Request Satisfaction Survey, create a notification. To get the URL of the published survey so it can be included in the notification, click the **View Survey URL** related link. You can copy the URL and paste it as a hyperlink in the notification.

Add a trigger condition for an HR survey

When you create an HR survey, you can add a trigger condition to specify when the survey is sent and to whom.

Before you begin
Role required: sn_hr_core.admin, or sn_hr_core.manager

About this task
Trigger conditions are ideal for sending surveys to measure satisfaction with a recent experience, such as closing an HR request.Some descriptions use the Incident table as an example. Substitute HR case information to create an HR survey trigger condition.

See Survey administration.

See Survey trigger conditions.

To create a trigger condition:

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- A user with the HR Admin role must also be designated as an HR delegated developer.
- Via the **Settings** icon, this user must change the Developer application from **Global** to **Human Resources: Core**.

Procedure

1. Navigate to **All** > **HR Administration** > **Surveys** > **Trigger Conditions**.
2. Click **New**.
3. Complete the form.
   For details about the fields, see Trigger Condition form for surveys
4. Click **Submit**.

Managed lists

You can use the **Managed Lists** module to view and manage administrative areas like departments, locations, positions, and details about HR services.

To access managed lists, go to **HR Administration** > **Managed Lists**.

Add or modify departments

You can use departments to categorize users. Departments are assigned to an employee user profile, and are synchronized to the HR profile.

Before you begin
Role required: admin

About this task
The base system provides various departments. You can create or edit existing departments and add users.

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Departments**.
2. Click a department name to view or edit details for that department.
3. Click **New** to create a department.
4. Use the ID field to enter a company-specific department number.
5. Click **Save** to stay on the **Departments** form.
   The **Expense Allocations** and **Users** tabs appear.
6. Click **Expense Allocations** to view all expense allocations associated with the department.
7. Click **New** to create a new expense allocation associated with the department.
8. Click **Users** to view all users associated with the department.
9. Click **New** to create a new user associated with the department.
10. Click **Save** to stay on the **Departments** form or Update to return to the **Departments** list.

Add or modify locations

If your company has multiple offices, location records store the address and contact details for each site, and are assigned in the employee HR profile and user records. The location of an HR agent can be used for automatic assignment of HR cases.

Before you begin
Role required: admin

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About this task
The Administrator can view, edit, or create locations. You can use the location of an HR agent for automatic assignment of HR cases.

Procedure
1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Locations**.
2. Click a location name to view or edit details for that location.
3. Click **New** to create a location.
4. Click **Save** to stay on the **Locations** form.
   The Locations section displays at the bottom of the form. Use to create a parent/child relationship between locations.
5. Click **New** to create a child location.
6. Click **Save** to stay on the **Locations** form or **Submit** to return to the **Locations** list.

Add or modify employee positions

As part of the Human Resources setup process, you define positions to describe employee job functions within the organization. Positions are associated with employees in the HR profile.

Before you begin
Role required: admin

About this task
Create position records for your organization. Other organization information, such as location and department information, is already set up in the ServiceNow system and used in User [sys_user] records.

Procedure
1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Positions**.
2. Click **New** to create a position, or click an entry to open an existing position.
   If you view an existing position, the **HR Profiles** related list displays HR profiles of users assigned to the position at the bottom.
3. Enter the **Position** title and select the **Department**.
4. Check **Active**.
5. Click **Save** to stay on the **Positions** form or **Submit** or **Update** to return to the **Positions** list.

Add or modify employee relationships

As part of the Human Resources setup process, you define relationships to describe how contacts and beneficiaries are related to employees.

Before you begin
Role required: admin

About this task
Create relationship records for your organization.

Procedure
1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Relationships**.
2. Click **New** or edit an existing relationship.
3. Enter the relationship identifier or name.

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For example, Spouse.

4. Enter a value for the relationship.
   The value is used to further define the relationship.
5. Check Dependent when the relationship is a dependent on the employee for benefits or support.
6. Click **Submit** or **Update**.

Add or modify benefit types

Benefit types are benefits offered by your company and the associated table.

Before you begin

Role required: sn_hr_core.basic, or sn_hr_core.manager
You can add or modify a benefit type using the Managed Lists module.

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Benefit Types**.
   The HR Benefit Types list opens.
2. Click **New** to create a benefit type or on an existing benefit type to edit.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

HR Benefit Type form

Field	Description
Name	Benefit type.
Value	Issue value name, such as benefit_401k, or basic_life.
Type	Click and select the benefit type. Benefit types are: ○ HR Disability Benefit ○ HR Health Benefit ○ HR Insurance Benefit ○ HR Retirement Benefit
Active	Check to make this benefit type active and available to use.
Requires beneficiaries	Check to indicate that this benefit type requires beneficiaries to be entered when selected.

4. Click **Save**.
   The **HR Benefit Plans** section appears.
5. Click **New** to create a benefit plan associated with the benefit type.
6. To modify benefit type data, find the existing benefit type in the HR Benefit Types list.
   You can use the list search menu by typing the benefit type and pressing Enter.
7. Click the benefit type to open the form.
8. Modify the form.
9. Click **Update**.

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Add or modify benefit plans

You can add or modify a benefit plan and provider using the Benefit Plan for under Managed Lists. The plan name is a combination of the provider and plan type.

Before you begin

Role required: sn_hr_core.basic, or sn_hr_core.manager

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Benefit Plans**.
   The HR Benefit Plans list opens.
2. Click **New** to create a benefit plan or on an existing plan to edit.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

Field	Description
Plan name	The name of the benefit plan. This field is a combination the **Provider** name and **Plan type**. After you enter a Provider and Plan type, this field fills in.
Provider	Click and select the name of the benefit provider. For new providers, click the **Ref erence field** icon to enter details about the provider. This field combines with **Plan type** to create the **Plan name**.
Benefit type	The type of insurance or financial services provided.
Plan type	The name of the specific insurance or finan cial services plans offered by the provider. The **Plan type** combined with the **Provider name** make up the **Plan name**.
Active	Check to make this benefit plan active and available to use.
Plan administrator	Click and select the company representative responsible for this benefit plan. The plan ad ministrator is the person that communicates directly with the provider, understand the de tails of the benefit plan, and can be a point-of-contact for questions.

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Field	Description
Plan URL	Click and enter the website or link to the bene fit plan.

4. Click **Save** to stay on the **HR Benefit Plan** form or **Update** to return to the **HR Benefit Plans** list.

Add or modify disciplinary issue types

Disciplinary issue types are misconduct that can trigger a disciplinary action.

Before you begin

Role required: sn_hr_core.basic, or sn_hr_core.manager

About this task

Disciplinary issue types can be viewed at **HR Administration** > **Managed Lists** > **Disciplinary Issue Types**.

Default types of disciplinary issues include:

- Absenteeism
- Abusive Language or Behavior
- Improper Dress
- Misconduct
- Insubordination
- Tardiness
- Improper Use of Equipment
- Unsatisfactory Work Performance
- Failure to Follow Corporate Policy
- Other

Procedure

1. Navigate to **HR Administration** > **Managed Lists** > **Disciplinary Issues Types**.
   The HR Disciplinary Issue Types list opens.
2. Click **New** to open a disciplinary issue type record.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

Disciplinary issue type form

Field	Description
Issue	The disciplinary issue.
Order	Number set to indicate the order in which the issue appears in the **HR Disciplinary Issue Types** list.
Value	Issue value name, such as absenteeism, or improper_dress.

4. Click **Save** to stay on the **HR Disciplinary Issue Type** form or **Submit** to return to the **HR Disciplinary Issue Types** list.

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5. To modify disciplinary issue type data, find the existing disciplinary issue type in the HR Disciplinary Issue Types list.
   You can use the list search menu by typing the disciplinary issue type and pressing Enter.
6. Click the disciplinary issue type to open the form.
7. Modify the form.
8. Click **Save** to stay on the **HR Disciplinary Issue Type** form or **Update** to return to the **HR Disciplinary Issue Types** list.

Add or modify disciplinary warning types

A disciplinary warning type is the method used to communicate or the action taken as a result of a disciplinary type.

Before you begin

Role required: sn_hr_core.basic, or sn_hr_core.manager

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Warning Types**.
   The HR Disciplinary Warning Types list opens.
2. Click **New** to create a disciplinary issue type record or on an existing record to edit.
3. Complete the form.

> **Note:** The fields you see depend on how the form is configured and what fields are selected to display.

HR Disciplinary Warning Type form

Field	Description
Warning	Warning type or action.
Order	Number set to indicate the order in which the issue appears in the **HR Disciplinary Warning Types** list.
Value	Issue value name, such as verbal or written.

4. Click **Save** to stay on the **HR Warning Type** form or **Submit** to return to the **HR Warning Types** list.
5. Click **Update** to return to the **HR Warning Types** list.

Add or modify HR systems

You can add or modify an HR operations system using the HR Administration module.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.manager

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **HR Systems**.
   The HR Operating Systems list opens.
2. Click **New** to open an HR Operations System record.
3. Complete the form.

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(The fields you see depend on how the form is configured and what fields are selected to display.)

HR OIperations System form

Field	Description
Name	Name of the HR system.
Contact	The internal company contact for the system.
URL	The web address for the HR system.
Active	Check to make active and available to use.
Order	Number set to indicate the order in which the issue appears in the **HR Operations Systems** list.

4. Click **Save** to stay on the **HR Operations System** form or **Submit** to return to the **HR Operations Systems** list.
5. To modify an HR system, find the existing HR system in the HR Operations Systems list. You can use the list search menu by typing the HR system and pressing Enter.
6. Modify the form.
7. Click **Save** to stay on the **HR Operations System** form or **Update** to return to the **HR Operations Systems** list.

Add or modify HR report frequencies

HR operations report frequencies determines how often reports are generated.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.manager

About this task

Employees can ask about HR report frequencies or request an HR report frequency through the HR Service Portal.

By default, the report frequencies available are:

- Daily
- Weekly
- Monthly
- Quarterly
- Yearly

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Report Frequencies**.
   The **HR Operations Report Frequencies** list opens.
2. Click **New** to create an HR operations report frequency record or on an existing record to edit.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

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HR Operations Report Frequency form

Field	Description
Report frequency	How often the report generates, for example, daily, weekly, monthly.
Domain	

4. Click **Save** to save the record and stay on the **HR Operations Report Frequency** form.
5. Click **Submit** and return to the **HR Operations Report Frequency** list.

Add or modify HR report types

Report types define the category of information that appears in an HR operational report.

Before you begin

Role required: hr_basic, or hr_manager

About this task

Types of system reports include:

- Customer Satisfaction
- Compliance
- Operational
- Trend Analysis
- Other

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Report Types**.
   The **HR Operations Report Types** list opens.
2. Click **New** to open a system report type record.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

HR Operations Report Type form

Field	Description
Report type	The kind of report to generate, such as, compliance or operational.

4. Click **Submit**.
   The system report type is listed in the **HR Operations Report Types** list.
5. To modify the system report type data, find the existing system report type in the **HR Operations Report Types** list.
   You can use the list search menu by typing the report type name and pressing Enter.
6. Click the system report type to open the form.
7. Modify the form.
8. Click **Update**.

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Add or modify visa categories

You can add or modify a visa category using the HR Administrations module.

Before you begin

Role required: hr_basic, or hr_manager

About this task

Currently, there are two types of visas:

- Business — Employee is traveling to a foreign country to conduct business. An example is Joe Employee is traveling to Japan for a week for meetings with a customer and co-workers in the Tokyo office.
- Work — Employee is traveling to a foreign country to work as an expatriate (expat). An example is Joe Employee is relocating to the Tokyo office to work in Japan for two years.

To create or modify a visa category:

Procedure

1. Navigate to **All** > **HR Administration** > **Managed Lists** > **Visa Category**.
   The **HR Visa Categories** list opens.
2. Click **New** or a visa category.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

HR Visa Category form

Field	Description
Visa category	Enter or edit the name of the visa category.

4. Click **Submit** or **Update**.
   The visa category appears in the **HR Visa Categories** list.

HR Knowledge Management

HR knowledge management allows the enterprise HR department to provide employees with a searchable knowledge base of HR policies, procedures, and other articles. By sharing information with employees, HR can reduce the time spent answering routine questions and enable employees to find answers that are relevant to them.

HR knowledge bases

The Case and Knowledge Management application provides the following preconfigured HR knowledge base: Human Resources General Knowledge.

A knowledge administrator can create additional HR knowledge bases. Each knowledge base can be assigned to a knowledge owner and managers, as well as have unique workflows, user criteria, and category structures. See Create a knowledge base for more information.

HR knowledge articles

Each knowledge base contains knowledge articles, which are organized into categories and subcategories. For example, knowledge articles in the Human Resources General Knowledge base are organized among six categories.

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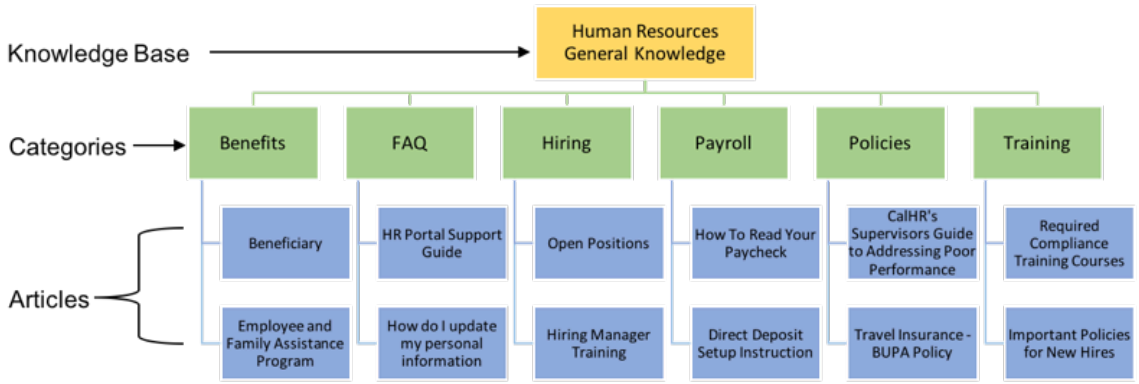

Knowledge contributors can create HR knowledge articles in a knowledge base.

For more information, see Create an HR knowledge article.

You can also attach or link HR knowledge articles to an HR case or HR catalog item.

- Attach knowledge articles to an HR case
- Link knowledge articles or managed documents to an HR catalog item

HR knowledge blocks

You can use knowledge blocks with HR knowledge management to simplify knowledge authoring for writers and knowledge consumption for readers. Knowledge blocks are reusable pieces of content secured by user criteria that you can add to knowledge articles in a knowledge base. The user criteria controls which users can read or not read the block content in an article or search, enabling users to more easily view content that is relevant to them.

For more information, see Knowledge blocks for HR knowledge management.

Related topics

Knowledge Management

Create an HR knowledge article

Create or modify a knowledge article within an HR knowledge base to share HR information across your organization.

Before you begin

Role required: sn_hr_core.kb_writer

Procedure

1. Navigate to **All** > **HR Administration** > **Knowledge Management** > **Create New Article**.
2. Fill in the fields on the form.

Knowledge form

Field	Description
Number	This field is automatically set to a knowledge article number.
Knowledge base	Name of the knowledge base.

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Field	Description
	Note: You can use an existing or create a new HR knowledge base. See Create a knowledge base for more information.
Category	Name of the knowledge category or subcategory. **Note:** You can use existing or create categories to organize the articles in the knowledge base. Click the Lookup icon to open the category picker, where you can select, add, and edit knowledge categories and subcategories.
Valid to	Date that the knowledge article expires. After the valid to date, or if the valid to field is empty, the article does not appear in the search results.
Short description	Description of the knowledge article.
Text	Text of the knowledge article.
Article type	Type of knowledge article: HTML or Wiki.
Workflow	This field is automatically set to the publication state of the article, such as Draft, Published, or Retired.
Source Task	This field is automatically set to the task record that the article was created in response to, if applicable.
Attachment link	Check box for enabling the automatic download of attachments. If selected, attached files automatically download when the user opens the article. **Note:** Currently, this option is not supported on the Employee Service Center.
Display attachments	Check box for enabling the display of attachment. If selected, attached files are displayed and accessible to users at the bottom of the article. **Note:** This option is contingent upon adding one or more attachments to the article. To add or manage attachments, click the paperclip icon in the title bar.

3. Click **Save** or **Update** to create or update the article.

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4. Click **Publish** to publish the article.

> **Note:** Any additional steps required to publish the knowledge article, such as approvals, depend on the publishing workflow for the knowledge base. See Knowledge workflows for more information.

Attach knowledge articles to an HR case

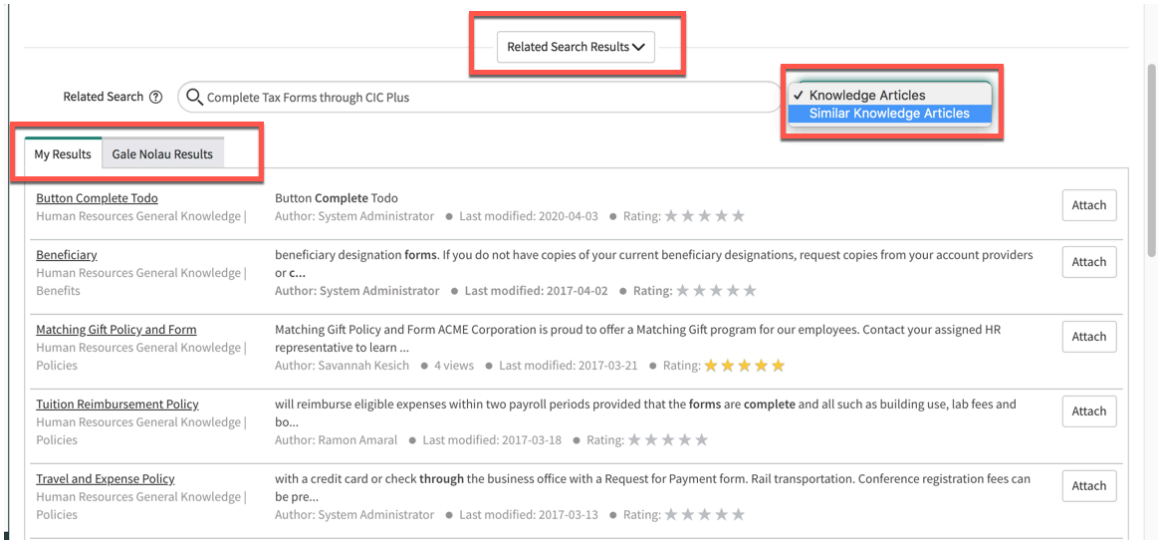
Attach one or more knowledge articles to an HR case to help process that record. For example, you can attach an article about the company dress code policy when an HR case is submitted that asks about wearing shorts to work.

Before you begin

Role required: hr_basic or hr_case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**, and open one of the modules, such as **Assigned to me** or **Open**.
2. Open an HR case.
3. Click **Related Search Results**.



The following options are displayed in a list:

- **Knowledge Articles**: Based on the short description of the HR case and the user criteria that is associated with the knowledge base, relevant knowledge articles are displayed in two tabs: **My Results** displays a list of articles you can access. **[employee name] Results** displays a list of articles that the Opened for employee can access.
- **Similar Knowledge Articles**: Based on the short description of the HR case, user criteria associated with the knowledge base, auto-training of the Similar Knowledge Articles for HR Case (ml_sn_sn_hr_core_global_case_to_articles) solution definition, similar knowledge articles are displayed in the **My Results** tab.

  The **Similar Knowledge Articles** option narrows down and displays the most relevant knowledge articles to resolve the HR case. This option is displayed only when the Predictive Intelligence for Contextual Search plugin is activated along with Human Resources Scoped App: Core plugin.

4. Review the list of suggested knowledge articles.

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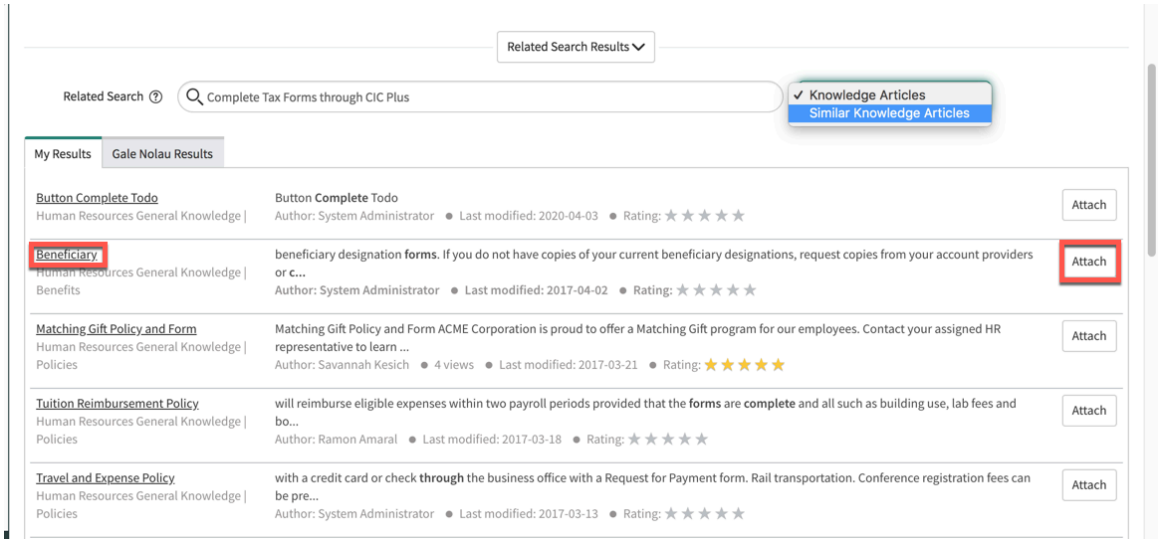
Action	Description
Preview the article	Click the article title. After reviewing the arti cle in the pop-up window, click **Attach to HR Case** if it is relevant, or click **(X)** to close the article.
Attach the article without previewing it	Click **Attach** next to the article. **Note:** When you attach an article, its text is copied to **Additional comments**. After you save the case, it also appears in the **Attached Knowledge** related list.



5. Click **Save**.
   You can remove an attachment by going to the **Attached Knowledge** tab and clicking **Edit...** button. From the list displayed, you can select the knowledge article to remove and click **<**. Click **Save** to complete the process.

Knowledge blocks for HR knowledge management

You can use knowledge blocks with HR Service Delivery to simplify knowledge authoring for writers and knowledge consumption for readers.

Knowledge blocks are reusable pieces of content secured by user criteria that you can add to knowledge articles in a knowledge base. The user criteria controls which users can read or not read the block content in an article or search, enabling users to more easily view content that is relevant to them.

How to use knowledge blocks

To use knowledge blocks, a knowledge administrator or manager must enable the knowledge blocks feature for each knowledge base in which the blocks will be used.

Enable knowledge blocks for each knowledge base

Knowledge contributors can create knowledge blocks and insert them into articles in a knowledge base:

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Note: Knowledge blocks are not supported in articles of type wiki. By default, knowledge block doesn't show files attached to it. However, you can see images and text are visible on KB's created from block files.

- Create a knowledge block
- Add knowledge blocks to a knowledge article
- Preview a knowledge article with knowledge blocks by user or date

Knowledge block content can be read or not read in an article or search based on user criteria set at the knowledge base and knowledge block level. See Select user criteria for a knowledge block for more information.

Example: Holiday calendar with location-specific knowledge block content

You are part of an enterprise HR organization that maintains a company knowledge base. You want to create a holiday calendar so that employees know which days of the year are company holidays. Since the company has multiple locations and holiday dates vary based on where the employee is located, there are several ways that you could create the knowledge article.

One way is that you could create a knowledge article for each location, with an article for Location A, Location B, and so on.

- Pros: simplified consumption. Employees have a single article to search for and read.
- Cons: more work for HR. HR has multiple articles to manage and update for each location where the company has employees.

Another way is that you could create a single knowledge article that includes sections for each location.

- Pros: simplified authoring. HR has a single article to manage and update.
- Cons: more work for employees. Employee must scroll through and disregard extraneous content to find the section in the article that pertains to them.

With knowledge blocks, you can create a single knowledge article with location-specific block content secured by user criteria. This approach helps to reduce the workload for both HR and employees. As an HR agent, you have a single article to manage and update. Employees have a single article to search for and read, with the user criteria ensuring that they only view content that is relevant to them.

If you are using a custom search or knowledge article viewer

If you are using a custom search or knowledge article viewer with your application, you should integrate it with the appropriate knowledge or knowledge blocks API. (Integration is only necessary if you are using a custom search or knowledge article viewer.)

Integrating a custom search or knowledge article viewer with knowledge blocks

Activation information

To use knowledge blocks in your application, you must activate knowledge blocks. For information on what components are installed with the feature, see Components installed with knowledge blocks.

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Note: Activating knowledge blocks automatically activates Knowledge Management Advanced, which enables advanced features such as article versioning. Knowledge blocks can be used with or without the article versioning feature. To disable the feature, see Disable the article versioning feature.

Related topics

Knowledge blocks

HR services

HR services are the requests and assistance an HR organization provides its employees, such as benefits enrollment, direct deposit setup, and requests for relocation assistance.

They are the starting point for HR case creation and define the process for that case type, from request to fulfillment. You can create new or modify existing HR services, as well as configure them to be available for internal use only or for employee self-service.

HR Centers of Excellence data model

HR services are categorized under one of the HR Centers of Excellence (COEs), which are part of a data model that organizes HR data, services, and processes by functional discipline. Each COE is an extension of the HR Case [sn_hr_core_case] table, and each COE is further organized by HR topic category and detail. Before you begin configuring the individual HR services, review and set up the categorization structure for them.

- HR Centers of Excellence data model
- HR service categorization

HR request to fulfillment process

In determining what HR services to offer, you should consider:

- What are the requests you expect to receive and the services you want to provide?
- How do you plan to report on this data? This affects how you categorize your HR services.
- What information must you collect to fulfill the requests?
- How can the requests be made?
  - Email
  - Phone
  - Employee self-service through the HR service catalog
- How is the request ultimately fulfilled?
  - HR case form
  - Fulfillment instructions
  - Approvals
  - Tasks
  - Child HR services
  - Lifecycle events
  - Knowledge articles

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HR service configuration

HR services are the starting point for HR case creation and define the request to fulfillment process for that case type. The configuration requirements for an HR service depend on whether it is available for internal use only, or if you are allowing the employee to request the service directly from the HR service catalog through a self-service portal such as the Employee Center.

Configuration

HR service type	Configuration requirements
Internal use only	• HR service • HR case template
Employee self-service	• HR service • HR case template • HR catalog item (also known as a record producer)

Not all HR services need to be accessible for employee self-service. Some services may only be initiated by HR agents, such as to set up payroll for a new hire. Some services may require the employee to contact HR directly by email or phone, such as when a manager requests a promotion for a direct report. In these cases, the HR case is created internally by the HR agent. HR services intended for internal use only require configuration of the HR service and HR case template. See HR service configuration for more information.

Other HR services, however, may also be initiated by the employee, such as to update an employee profile or to request a password reset. These services are made available as HR catalog items in the HR service catalog. Employees can browse the HR service catalog and make requests directly from a self-service portal such as the Employee Center. HR services intended for employee self-service require configuration of the HR catalog item (also known as a record producer) in addition to the HR service and HR case template. See HR catalog item configuration for more information.

HR service catalog management

The HR service catalog provides employees a catalog of HR services that they can request directly from HR. Employees can access the HR service catalog from a self-service portal such as the Employee Center. You can manage the setup and categorization of the HR service catalog, as well as configure the individual HR catalog items that populate it.

- HR service catalog management
- HR service catalog categorization

HR template configuration

HR templates allow you to: automatically populate fields on an HR case or task form. You can configure HR templates for:

- HR services
- HR catalog items
- HR service activities
- Lifecycle event activities

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For more information, see HR templates.

HR Centers of Excellence data model

Organize HR data, services, and processes by functional discipline with the HR Centers of Excellence (COEs) data model.

COE data model overview

The HR Centers of Excellence (COEs) data model provides a structured approach to organizing HR services by functional discipline. This model helps organizations standardize processes, improve service delivery, and maintain consistent reporting across different HR domains.

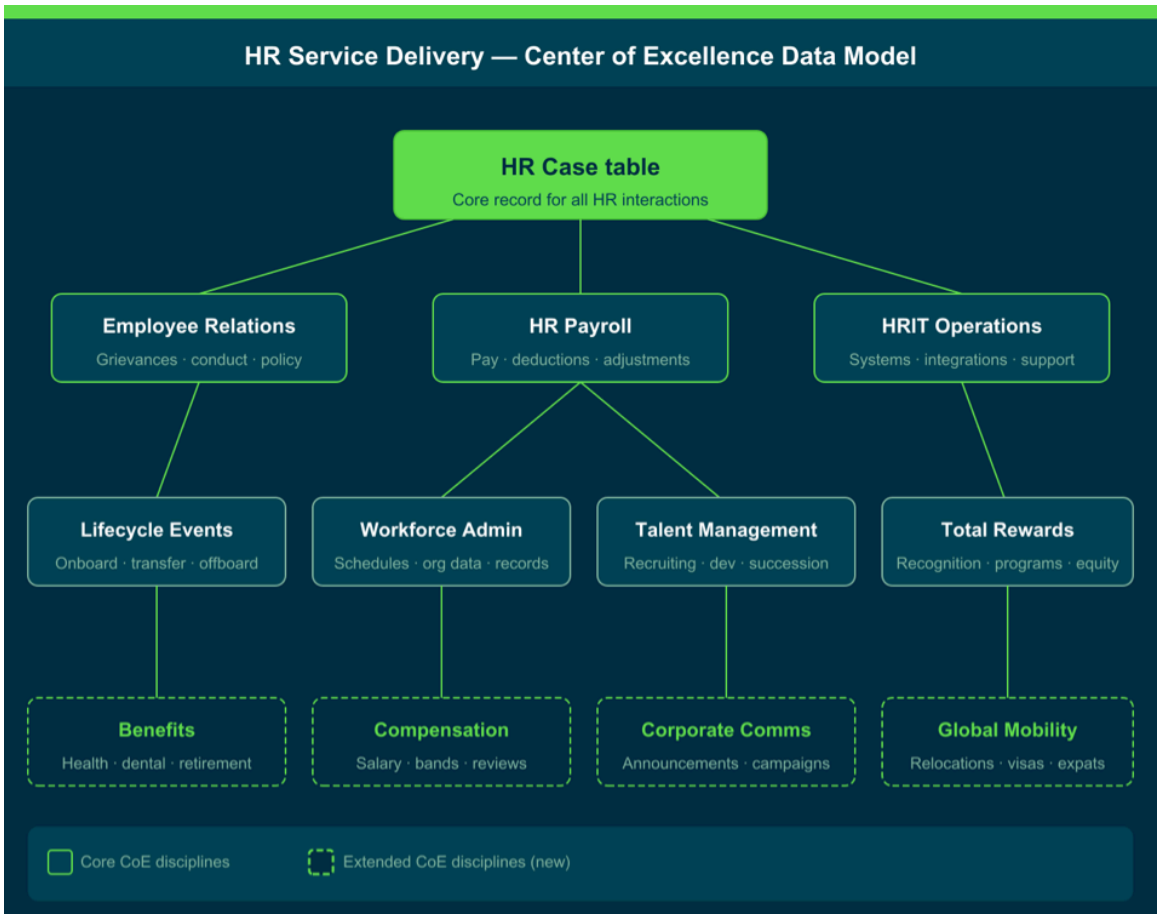
https://player.vimeo.com/video/980245693?h=df05d40e5a&badge=0&autopause=0&player_id=0&app_id=58479

Each COE can be configured to its unique function, such as payroll or employee relations. The COE data model allows you to limit access to sensitive information, promote consistency for metrics and reporting, and help drive automation by defining the request to fulfillment process at the HR service level.

HR Centers of Excellence structure

Each HR Center of Excellence is an extension of the HR Case [sn_hr_core_case] table and is organized around a functional discipline, such as employee relations, lifecycle events, payroll, talent management, workforce administration, total rewards, HRIT operations, benefits, compensation, corporate communications, and global mobility.

Note: The benefits, compensation, corporate communications, and global mobility COEs are inactive by default.



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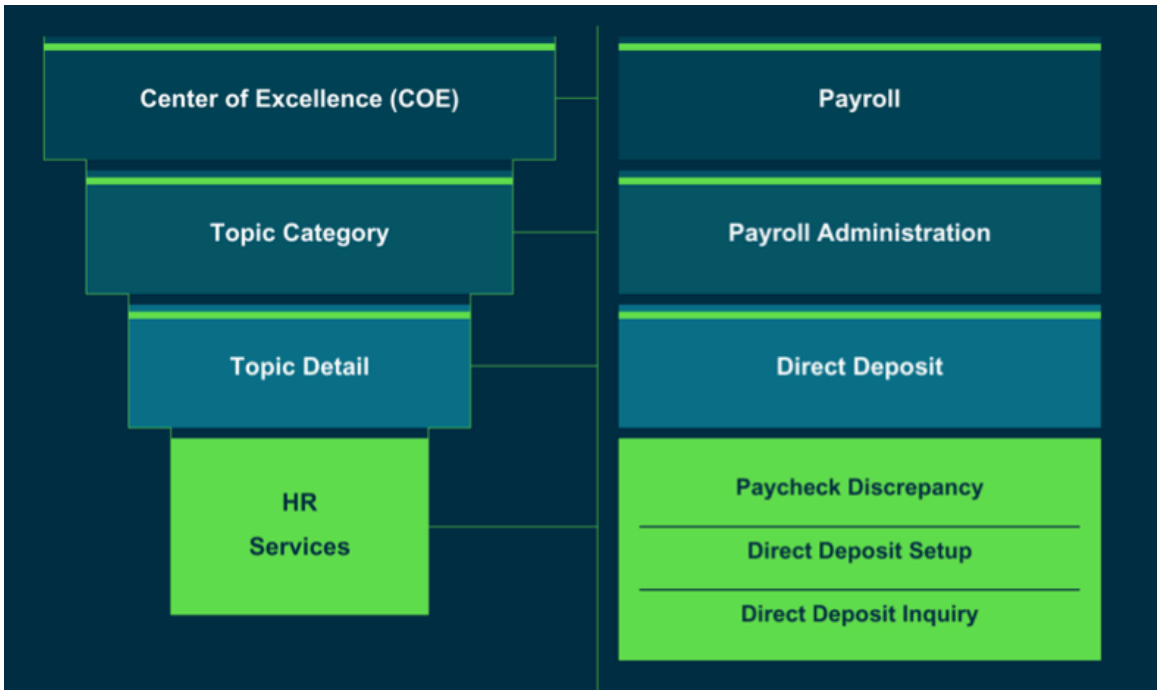
Data model hierarchy

Each COE is organized by HR topic category and detail, which defines the first- and second-level categorization for HR services under that COE. This hierarchical structure provides flexibility in organizing services:

- Each COE can have one or more topic categories
- Each topic category can have one or more topic details
- Each topic detail can have one or more HR services

This structure enables you to categorize HR services by functional area, and you can configure the categorization structure and the individual HR services to meet your organization's needs.



HR service categorization setup

Before configuring individual HR services, review and set up the categorization structure for them. This foundational step ensures that your services are properly organized within the COE framework.

Note: For a list of base system COEs and how to enable or disable them, see Enable or disable an HR Center of Excellence (COE).

Roles

The following roles can create and configure COEs:

- System administrator (admin).
- Lifecycle event administrator (sn_hr_le.admin) with the Delegated Developer (delegated_developer) role.

HR service categorization

HR services are categorized under one of the HR Centers of Excellence (COEs), which are part of a data model that organizes HR data, services, and processes by functional discipline.

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Each COE is an extension of the HR Case [sn_hr_core_case] table, and each COE is further organized by HR topic category and detail. Before you begin configuring the individual HR services, determine which COEs you want to use, and then create or modify the appropriate HR topic categories and details for each COE.

Enable or disable an HR Center of Excellence (COE)

Enable or disable an HR Center of Excellence (COE) for use. COEs are tables that extend the HR Case [sn_hr_core_case] table and part of a functional discipline, such as total rewards or talent management. COEs are also part of HR services that contain topic category and detail.

Before you begin

Role required: sn_hr_core.admin

Deactivate COEs manually on all your environments, if your company:

- Does not use COEs.
- Wants to deactivate COEs.
- Has multiple environments and you're using system update sets to update changes.

> **Note:** System update sets capture deactivation in one environment, but after a patch or upgrade, COEs are active in your other environments. See System update sets.

Procedure

1. Navigate to **All** > **HR Administration** > **COE Configuration**.
2. Enable or disable the applicable HR Center of Excellence (COE).

> **Note:** The COEs available to you may differ depending on the HR package you have.
>
> - The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
> - If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
> - If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
> - The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

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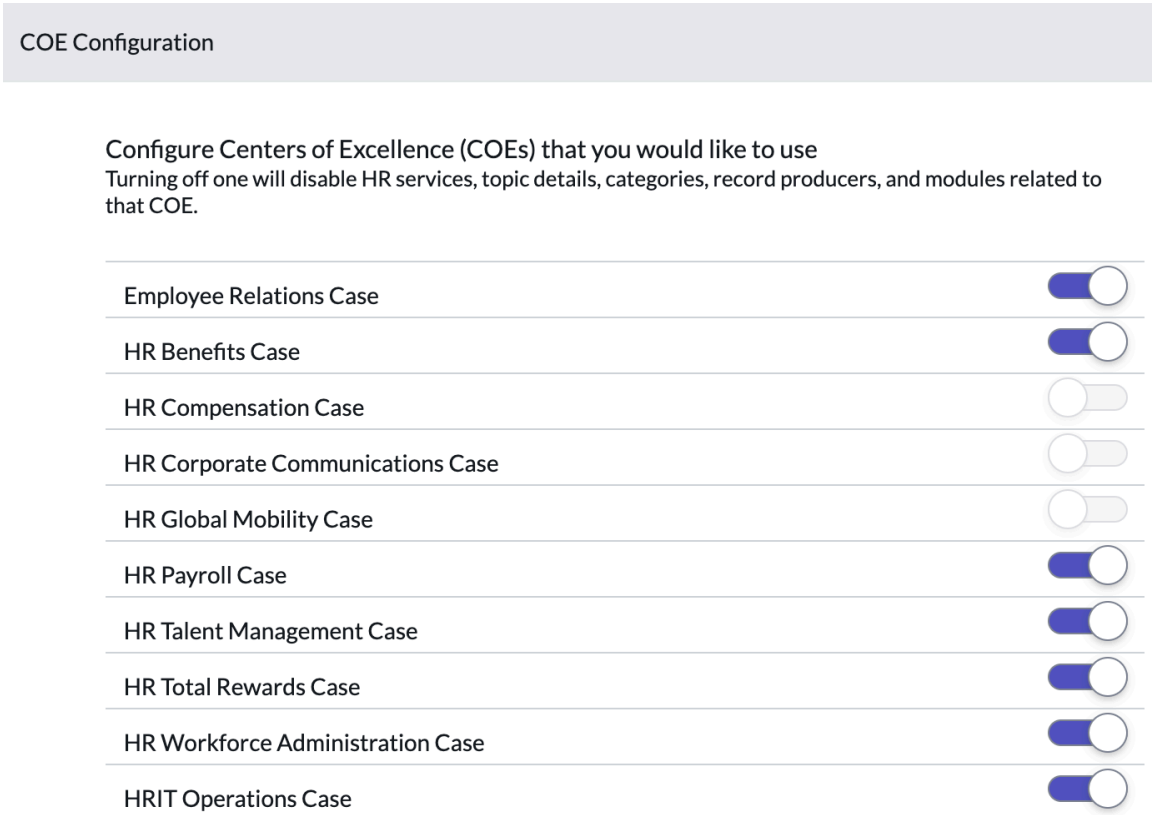

COEs that are not associated with any HR services, topic details, categories, or record producers are automatically disabled.

When you disable a COE, all associated HR services are also disabled. However, the extended tables linked to that COE remain accessible and are not disabled. Any active cases under the deactivated COE will continue to remain active; only the COE itself is deactivated.

3. Click **Save**.

Configure an HR topic category

Create or modify an HR topic category to define the first-level of categorization for HR services. Each topic category is associated with a single HR Center of Excellence (COE).

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Topic Categories**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Topic Category form

Field	Description
Active	Check box to activate the HR topic category for use.

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Field	Description
COE	Name of the HR Center of Excellence (COE) that the HR topic category is categorized under. Each HR topic category is associated with a single COE.
Name	Name of the HR topic category.

4. Click **Submit** or **Update**.

Configure an HR topic detail

Create or modify an HR topic detail to define the second-level of categorization for HR services. Each topic detail is associated with a single topic category and HR Center of Excellence (COE).

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Topic Details**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Topic Detail form

Field	Description
Active	Check box to activate the HR topic detail for use.
Name	Name of the HR topic detail.
Topic category	Name of the HR topic category that the HR topic detail is categorized under. Each HR topic detail is associated with a single HR topic category.

4. Click **Submit** or **Update**.

Configuring HR Service Delivery Center of Excellence (COE) security policies

Use COE Access Control List (ACLs) Configuration to allow specific groups read or write access to HR cases under a specific COE.

For example, you don't want the Benefits group to view the cases created by the Compensation group. You create a COE security policy that allows the Compensation group access. Groups that aren't included on the policy cannot access the cases.

Use this feature as an alternative to using ACLs rules. For more information on ACLs, see Access control list rules.

COE security policies don't affect case creation. COE security policies affect what cases you can view or modify after creation.

You can still reclassify (transfer) HR cases from one HR service to another. Depending on the security policy, you might not be able to view the case after reclassification.

COE ACL Configuration uses the COE Security Policy [sn_hr_core_coe_security_policy] table to determine access to the extended HR case tables (COEs).

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The * next to a table indicates it was deprecated for customers taking the Rome release to support a new data model. Existing customers using the legacy COEs and tables are not affected. These tables have been replaced by the Employee Relations feature. For more information, see Employee Relations.

The tables you can provide security for are:

Tables

Label	Name
HR Benefits Case	sn_hr_core_case_benefits
HR Compensation Case	sn_hr_core_case_compensation
HR Corporate Communications Case	sn_hr_core_case_corporate_communcations
*HR Employee Relations Case	sn_hr_core_case_relations
*HR Ethics Case	sn_hr_core_case_ethics
HR Global Mobility Case	sn_hr_core_case_global_mobility
HR Payroll Case	sn_hr_core_case_payroll
*HR Performance Case	sn_hr_core_case_performance
HR Talent Management Case	sn_hr_core_case_talent_management
HR Total Rewards Case	sn_hr_core_case_total_rewards
HR Workforce Administration Case	sn_hr_core_case_workforce_admin
HRIT Operations Case	sn_hr_core_case_operations
HR Lifecycle Events Case	sn_hr_le_case

Note: You can also provide security to any case table you extend.

To define security for a COE:

- Choose all or specific HR services that fall under a COE.

  Note: When you select specific HR services for a COE, the unselected HR services are accessible by the case reader.

- Determine what groups have read or write access to HR services under a COE.
- Create conditions to filter the records that apply to your security policy.

  Note: Condition builder is a powerful tool that filters specific actions on the COE. Use caution when using conditions on your security policy. It may also affect system performance.

Create COE security

Place security on a COE to prevent a group from accessing another group's cases.

Before you begin
Role required: admin, sn_hr_core.admin, sn_hr_le.admin

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Procedure

1. Navigate to **All** > **HR Administration** > **COE Security Configuration**.
2. Select the COE (table that extends the HR case table) you want specified groups to have access to.
3. Check **Applies to all services** if you want all the HR services under the selected COE to be included in the security policy.
4. Leave this field blank to select specific HR services under a COE.
5. If you leave this field blank, the **Services** field appears and you can select specific HR services.
6. Ensure that the **Application** field displays the scope correctly.
   For more information, see System settings for the user interface (UI).
7. Check **Active** to enable security on the COE.
8. From the **Type** field, select how the policy you are defining controls security for the COE.
   Your choices are:
   - Read
   - Write
   - Case Restriction

   Note: The Case restriction option is only displayed when Employee Relations is installed.

   Selecting Case Locking displays the following fields:
   - Able to lock cases: Users that belong to the associated group can lock cases under the COE.
   - Able to view locked cases: Users that belong to the associated group can view locked cases.
9. **Optional:** Select the filter condition (if configured) the security policy must pass for the COE to be in effect.

   Warning: Selecting the filter condition might impact the security policy and affect all cases under a COE, including the non-active cases. Be sure you understand the full impact of the condition.
10. Select **Save** to remain on the security policy you are working on or **Submit** to return to the list of COE Security Policies.
    If you select **Save**, the Groups related list appears.
11. Select **Edit** to associate groups to the COE security policy.
    For more information on Groups, see Manage HR Groups.
12. Move the groups you want associated with the COE security policy you are defining from the Collection column to the Groups List column.
13. Select **Save**.
    The COE Security Policy returns.
14. Select **Update**.

Use COE Security Diagnostics

Enable HR administrators to determine how the COE (HR Centers of Excellence) security policies are evaluated for HR agents.

Before you begin

Role required: sn_hr_core.admin

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Note: COE security diagnostics:

- should not be used to find the overall access of a case for a given HR agent. It should only be used for analyzing how COE security policies are evaluated.
- does not cover all access scenarios and may differ from actual access results. For example, Opened for, Opened by, Watch List, and Collaborators get access to an HR case irrespective of its security policies. Use Access Analyzer for complete access analysis and accurate results.
- For Frequently Asked Questions (FAQs), see KB article.

Procedure

1. Navigate to **All** > **HR Administration** > **COE Security Diagnostics**.

Field	Description
HR case	Option to select an HR case for which you want to analyze the COE security policies. **Note:** The HR admin who is using COE Security Diagnostics must have access to HR cases that are being evaluated.
User	Option to select the HR agent for whom you want to analyze the COE security policies.
Operation	Option to check the type of access the HR agent has on the given HR case. ○ Read ○ Write

2. Select **Diagnose** to view the evaluation results.
   - Can read/Cannot read/Can Write/Cannot write: Message indicating the reason why the HR agent does or does not have to access to the HR case.
   - COE Security Policies: List of evaluated policies.
     - Policies are evaluated only if case COE matches the policy COE or case COE is a child of policy COE and **Applies to all child COEs** is enabled on that policy.
     - Write policies are evaluated for read access.
     - Evaluation stops once the matching policy passed the requirements.

Details on COE Security Policies

Field	Description
Policy name	Displays the policy name.
HR Service match	Indicates whether the case is matching the HR service configured in the COE security policy. **Note:** If **Applied to all services** is checked on the policy, the policy matches all HR cases of the COE.

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Field	Description
Condition match	Indicates whether the condition defined in the COE security policy matches with the HR case. **Note:** If condition is set to empty on this policy, then it matches all the HR cases.
Group match	Indicates whether the HR agent matches any of the groups.
Matched group	Indicates the name of first group matched for the HR agent.
Result	▪ **Skipped**: Indicates that the HR case does not match either HR service or Condition. ▪ **Failed**: Indicates that the HR case matches both HR service and Condition of the policy, but user is not member of any user group. ▪ **Passed**: Indicates that the HR case matches HR service, and condition, and user matches one of the groups.

HR service configuration

HR services are the requests and assistance an HR organization provides its employees. You can configure an HR service to define the request to fulfillment process for that case type.

You can configure an HR case template to automatically populate fields on the HR case form when a request for that service is made. And if you need to make an existing HR service available for employee self-service, you can configure a record producer to make the service available as an HR catalog item in the HR service catalog.

For best results, do not configure multiple record producers to invoke a single HR service.

Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration instead. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

Configure an HR service

Create or modify an HR service to define the request to fulfillment process for that case type. Examples of HR services include benefits enrollment, direct deposit setup, and background check requests by third-party providers.

Before you begin

Role required: sn_hr_core.admin

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Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Click **New** or open a record.

Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

3. Fill in the fields on the form, as appropriate.

HR Service form

Field	Description	
HR service name	Name of the HR service.	
Value	This field is automatically set to the name of the HR service.	
Badge	Badge to use with the HR service. Badges display on the portal to indicate to the employee which department is fulfilling that activity. See Configure an HR badge for more information.	
Fulfillment type	Fulfillment type of the HR service. Select one of the following values:	
	Manual	A simple fulfillment type with no associated configurations. For example, for a medical benefits inquiry, the HR agent would fulfill the employee's request by answering the employee's question.
	Service Activity	Service activities fulfill the HR service. In the **Service Activities** section at the bottom of the HR Service form, add one or more service activities to fulfill the HR service. **Note:** Service activities can be approvals, tasks, or child HR services. See Configure a service activity for an HR service for more information.
	Workflow	A workflow fulfills the HR service.
	Lifecycle Event	(Enterprise Onboarding and Transitions only) A lifecycle event fulfills the HR service. In the

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Field	Description	
		Lifecycle Event Type field, select a lifecycle event to fulfill the HR service. **Note:** A lifecycle event is a collection of activities that comprise an employee experience such as new hire onboarding. See Building a lifecycle event for more information.
	Advanced	An advanced option to fulfill the HR service using a combination of workflows and service activities.
	Flow	A flow fulfills the HR service. In the **Flow** field, select a flow that will be invoked to fulfill the HR service. To link flow to the HR service, a flow condition needs to be created for the HR service. A flow is an automated process of sequential and reusable actions. For more information, see Flow Designer.
Topic detail	HR topic detail that the HR service is categorized under. **Note:** The HR topic detail is the second-level of categorization for HR services. See HR service categorization for more information.	
Topic category	HR topic category that the HR service is categorized under. **Note:** The HR topic category is the first-level of categorization for HR services. See HR service categorization for more information.	
COE	HR Center of Excellence (COE) that the HR service is categorized under. **Note:** ○ The COEs are organized around functional disciplines and are extensions of the HR Case [sn_hr_core_case] table. See HR service categorization for more information. ○ (Enterprise Onboarding and Transitions only) An HR service for a lifecycle event can be associated with any COE.	
Automatically close case	Option to automatically close the HR case after all of the to-dos or all of the mandatory to-dos are complete. This field appears when **Service Activity** or **Lifecycle Event** is selected from **Fulfillment type**.	
	Close when	Select one of the following: ○ All to-dos are complete ○ Mandatory to-dos are complete
	Close offset	Number of days to offset the closure of the HR case. The maximum offset that you can apply is 90 days. For example, if the offset

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Field	Description
	is set to three, then the HR case will close three days after the completion of all (or all mandatory) to-dos. **Note:** If a case has only optional tasks and its HR Service has auto_close_case set to true and close_when set to mandatory (close when mandatory to-dos are complete), the case will automatically close when the scheduled job runs, ignoring the auto_close_offset field.
Opened for / Approver view	(Employee Service Center only) Configuration of the HR ticket page header for the person that the HR case was opened for and any approvers. **Note:** The HR ticket page is where users can view the details of an HR case in the Employee Center. See for more information.
Subject person / Task assignee view	(Employee Center only) Configuration of the HR ticket page header for the subject person of the HR case and any task assignees. **Note:** The HR ticket page is where users can view the details of an HR case in the Employee Center. See for more information.
Active	Option to activate the HR service for use.
Show case to subject person	(Employee Service Center Employee Center only) Option to show the HR case to the subject person when it is created, including: ○ HR tasks assigned to the subject person **Note:** The ticket page of the Employee Center shows all to-dos and requests for an HR case when the Opened for and Subject person are identical. If you want the Subject person to only see tasks assigned to them, change the Opened for person to someone different (possibly the Subject person's manager). ○ Child HR cases where the subject person is also the opened for ○ Child HR cases when the subject person has a task assigned ○ Requests where the subject person is the requested for If the HR case has one or more child cases, the child cases are automatically rolled up with the parent case up to three generations. HR child cases that are rolled up with the parent do not appear as separate requests on the requests page. Non-HR child cases appear both as a separate request and as part of the roll-up on the parent case.

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Field	Description
	Note: The HR ticket page is where users can view the details of an HR case in the Employee Center. See for more information.
Template	HR case template to use with the HR service. **Note:** The HR case template automatically populates fields on the HR case form when a request for that service is made. See Configure an HR case template for more information.
Record producer	(Employee self-service only) Record producer to use with the HR service if you want to make the service available as an HR catalog item in the HR service catalog. The record producer defines the required fields and how the HR catalog item appears in the HR service catalog to employees. For more information, see Configure a record producer for an HR service. **Tip:** For best results, do not configure multiple record producers to invoke a single HR service.
Case options	Additional case options for the HR service. For example, you can: ○ Add Manager to Watchlist: The manager of the opened for person is added to the watchlist and receives notifications about the case. ○ Agent Can Add An Approval: Allow agents the flexibility to add adhoc approvers to a case. For more information, see Add adhoc approvers to a case. ○ Automatically Create Draft Document: Automatically place a document for HR services to the subject person on the HR Service Portal. An example is when an employee requests tuition reimbursement. An education expense agreement document is automatically sent to the employee to sign. ○ Automatically Initiates Document tasks: Tasks are created for participants who are mapped to a document template. This option appears only when the Document Templates [com.snc.document_templates] plugin is installed and a document template is selected on a HR service. ○ Do Not Default Subject Person: Subject Person is not defaulted from the Opened for person when a case is created. ○ Skip Auto Assign: HR case is not automatically assigned to an HR group or agent using the HR template or matching rules. **Note:** Skipping auto assignment does not affect the HR templates, assignment rules, or the workflows. ○ Skip Automatic User Acceptance State: Select to bypass the user acceptance state. ○ User Cannot Cancel: Opened for person on HR case cannot cancel it via the Employee Center (EC) or service portal.
HR criteria	HR criteria to apply to the HR service.

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Field	Description
	Note: ○ HR criteria defines the conditions that an employee must meet for an HR agent to be able to access that HR service on their behalf. For example, you can configure the HR criteria for a 401(k) request so that the HR service is only available to U.S. employees from the **Create New Case** module. See HR criteria for more information. ○ (Employee self-service only) HR criteria applied to the HR service is internal-facing only, and has no relation to the user criteria that is used to control what HR catalog items an employee can access from the HR service catalog. See Edit the record producer for an HR catalog item for more information. ○ When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Case creation service config	Configuration of the HR case creation form for the HR service. **Note:** The HR case creation form is what displays when an HR agent selects an HR service from the **Create New Case** module. You can configure the form to include additional fields to collect relevant information. See Configure the HR case creation form for an HR service for more information.
Description	Description of the HR service.

4. In the **Checklist** related list, you can provide steps to help HR agents fulfill HR cases for the associated HR service.

HR checklist for HR agents

Field	Description
Checklist	Provide a checklist of items for HR agents to check off when fulfilling the HR case.

5. In the **HR Service Additional Information** related list, you can configure the fields that appear on the HR case form after a request for that service is made.
This is a two-part process. In addition to the configuration here, you must also configure the HR case form for the HR Center of Excellence (COE) that the HR service is categorized under.

Note: The HR case form is what displays after an HR case is created. Configuration of the HR case form is a two-part process. See Configure the HR case form for an HR service for more information.

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6. Click **Submit** or **Update**.

> **Note:** If you added a custom column to an HR COE table, you must create a UI policy action (**Visible** field is set to **False**) to hide it from other HR services that use that HR COE table. For example, if you add a custom column to the HR Payroll Case [sn_hr_core_case_payroll] table, it appears in all HR services related to this table. The custom column appears even after you add it for a specific HR service. For more information, see UI policies.

Configure a service activity for an HR service

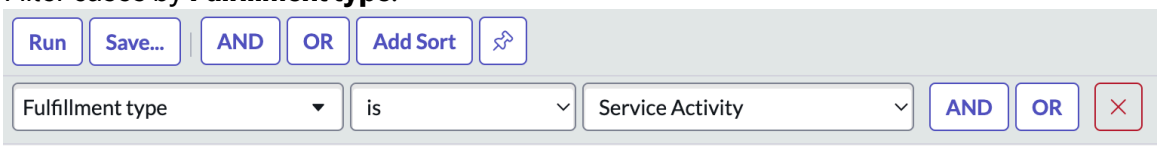
If the fulfillment type of an HR service is set to **Service Activity**, configure one or more service activities. Service activities can be approvals, tasks, or child HR services.

Before you begin

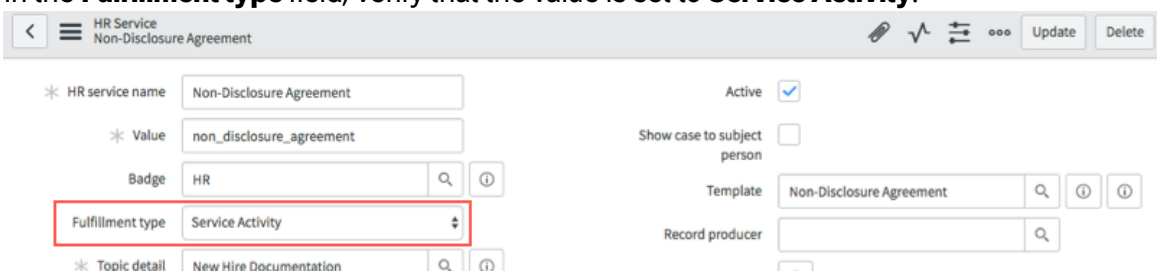
Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Filter cases by **Fulfillment type**.



3. Open the HR service.
4. In the **Fulfillment type** field, verify that the value is set to **Service Activity**.



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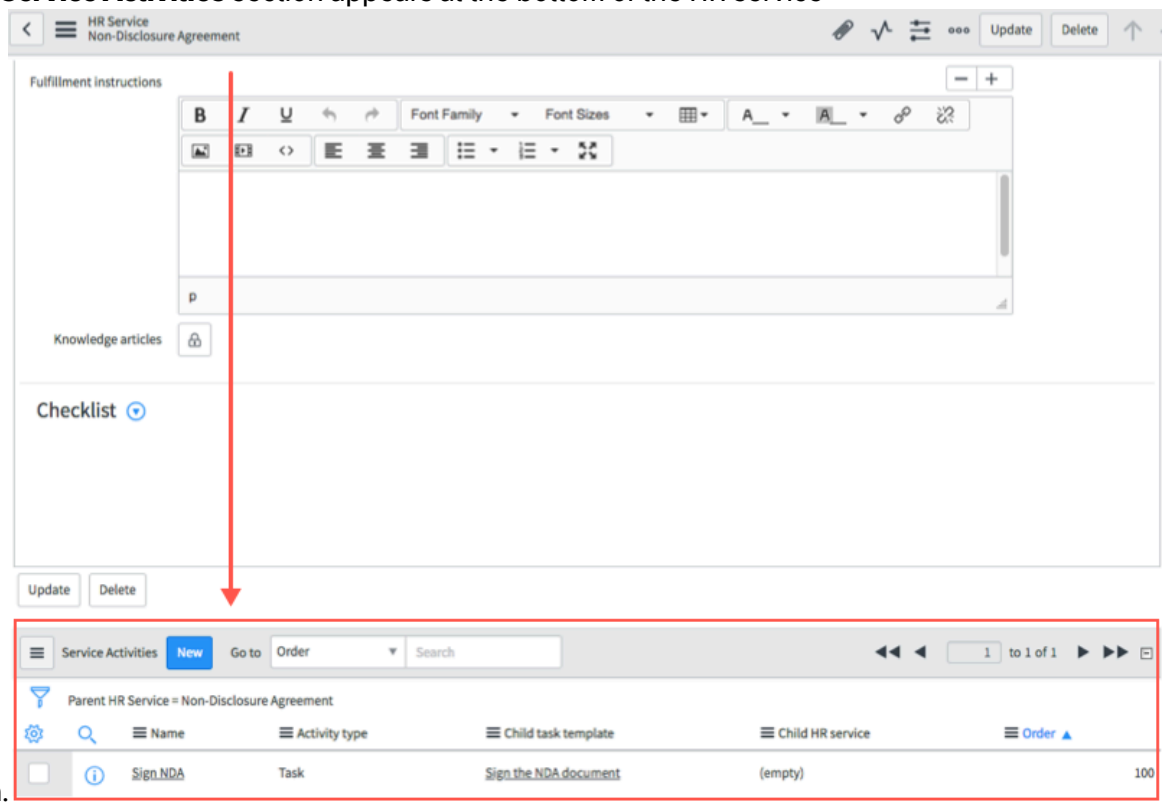
The **Service Activities** section appears at the bottom of the HR service form.



5. Click **New** or open a record, and follow the tasks as applicable.
   On the Service Activity form, you can configure the following types of service activities:
   - Approval
   - Task
   - Child HR Service

   For each service activity type, follow the applicable task.

Configure an approval

Configure a service activity that is an approval. Approvals require one or more users to approve the case before it can proceed.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. On the Service Activity form, set the **Activity type** field to `Approval`.
2. Fill in the fields on the form, as appropriate.

Service activity form fields and descriptions

Field	Description
Activity type	Set the value to **Approval**.
Name	Name of the service activity.
Missing any approver	Select one of the following actions for when any approver is missing:

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Field	Description
	○ Select replacements ○ Skip missing ○ Close incomplete
Missing all approvers	Select one of the following actions for when all approvers are missing: ○ Select replacements ○ Close incomplete
Wait for	Select one of the following actions for when an approval is completed: ○ Anyone to approve ○ Everyone to approve ○ First response from anyone
On rejection	Select one of the following actions for when an approval is rejected: ○ Allow resubmit of approvals **Note:** When an approval is rejected, the **Assigned to** user for the case can submit another request for approval with work notes or comments. See Resubmit an HR case for approval. ○ Close incomplete **Note:** To reject an approval, users should have the HR case writer [sn_hr_core.case_writer] role.
Parent HR service	This field is automatically set to the parent HR service.
Order	Order number for when the service activity is made available. Lower numbered service activities are made available before higher numbered service activities. **Note:** ○ The current service activity must be closed, completed, accepted, or rejected before the next service activity is made available. ○ Service activities with identical order numbers are made available at the same time.
Approvers from case	User fields from the HR case to approve the task.
Approver users	Users to approve the task.
Approver groups	Groups to approve the task.

3. Click **Submit** or **Update** on the Service Activity form.
4. Click **Update** on the HR Service form.

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Configure a task

Configure a service activity that is a task.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. On the Service Activity form, set the **Activity type** field to `Task`.
2. Fill in the fields on the form, as appropriate.

Service activity form

Field	Description
Activity type	Set the value to **Task**.
Child task template	Name of the child task template that the service activity is associated with. **Note:** The HR task template automatically populates fields on the HR task form when the task is generated. See Configure an HR task template for more information.
Name	Name of the service activity.
Parent HR service	This field is automatically set to the parent HR service.
Order	Order number for when the service activity is made available. Lower numbered service activities are made available before higher numbered service activities. **Note:** ○ The current service activity must be closed, completed, accepted, or rejected before the next service activity is made available. ○ Service activities with the same order number will be grouped and when there is an approval activity in the group, approval will execute first, followed by others.

3. Click **Submit** or **Update** on the Service Activity form.
4. Click **Update** on the HR Service form.

Configure a child HR service

Configure a service activity that is a child HR service.

Before you begin

Role required: sn_hr_core.admin

Note: This feature is only available when the Human Resources Scoped App: Lifecycle Events (com.sn_hr_lifecycle_events) plugin is activated.

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Procedure

1. On the Service Activity form, set the **Activity type** field to `Child HR Service`.
2. Fill in the fields on the form, as appropriate.

Service activity form fields and descriptions

Field	Description
Activity type	Set the value to **Child HR Service**.
Child HR service	Name of the child HR service that the service activity is associated with.
Name	Name of the service activity.
Parent HR service	This field is automatically set to the parent HR service.
Order	Order number for when the service activity is made available. Lower numbered service activities are made available before higher numbered service activities. **Note:** ○ The current service activity must be closed, completed, accepted, or rejected before the next service activity is made available. ○ Service activities with identical order numbers are made available at the same time.

3. Click **Submit** or **Update** on the Service Activity form.
4. Click **Update** on the HR Service form.

Configure the HR case creation form for an HR service

Configure the fields that appear on the HR case creation form for an HR service.

Before you begin

Role required: sn_hr_core.admin

About this task

This is the form that displays when an HR agent selects an HR service from the **Create New Case** module. You can include additional fields on the HR case creation form so that HR agents are able to collect relevant information before beginning work on the case. The case creation configuration records can be applied to one or more HR services.

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Open the HR service.
3. In the **Case creation service config** field, open the case creation configuration record.

   Note: To create a new case creation configuration record for the HR service, click the **Lookup** icon, and then click **New**.

4. Fill in the fields on the form.

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Case Creation Service Configuration form

Field	Description
Name	Name of the case creation service configuration record.
Task create table	Name of the HR case table that the record is associated with.
Left task fields	Fields to add on the left side of the form. **Note:** Only fields added to the Left task fields appear on the User segment groups form. Fields added to the Right task fields do not appear o the User segment groups form. For more information, see Create a user segment group.
Right task fields	Fields to add on the right side of the form.
Bottom task fields	Fields to add on the bottom of the form.

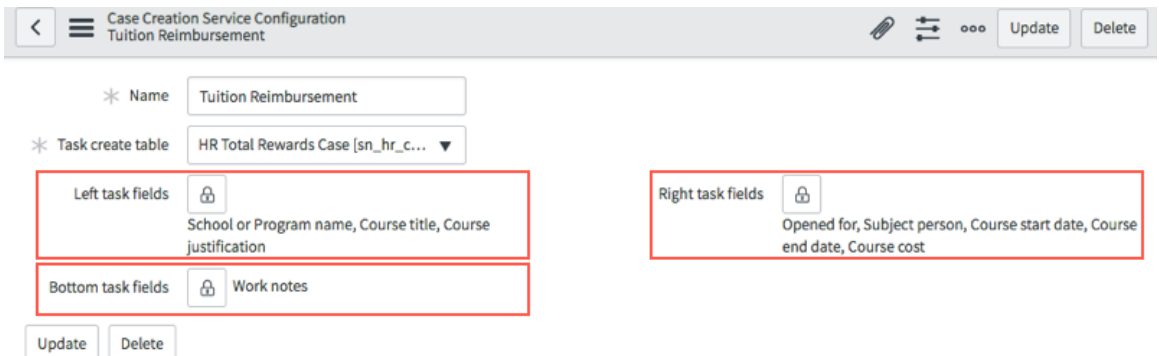
Note: When adding the Description(rich_description) field, the TinyMCE HTML editor does not appear until after the case is created and viewable. Any HTML formatted edits can be added after the case is created.

5. Click **Submit** or **Update** on the case creation service configuration record.
6. Click **Update** on the HR service form.

Example: Additional fields for tuition reimbursement HR case creation forms

You are part of an enterprise HR organization using the HR Service Delivery application. You have several HR services related to tuition reimbursement, and you know this case type requires the HR agent to collect information such as the school name, course title, and course justification before case work can begin. If that information is collected prior to case creation, you can save your organization time by avoiding the back-and-forth the HR agent and employee must engage in to capture the relevant information.

To do this, you need to configure the HR case creation form for tuition reimbursement HR services to include additional fields that ask for the school or program name, course title, course justification, course start date, and course end date. So you create a case creation service configuration record and associate it with the HR Total Rewards Case [sn_hr_core_case_total_rewards] table. For the left, right, and bottom task fields, you add the additional fields you want to appear on the form.



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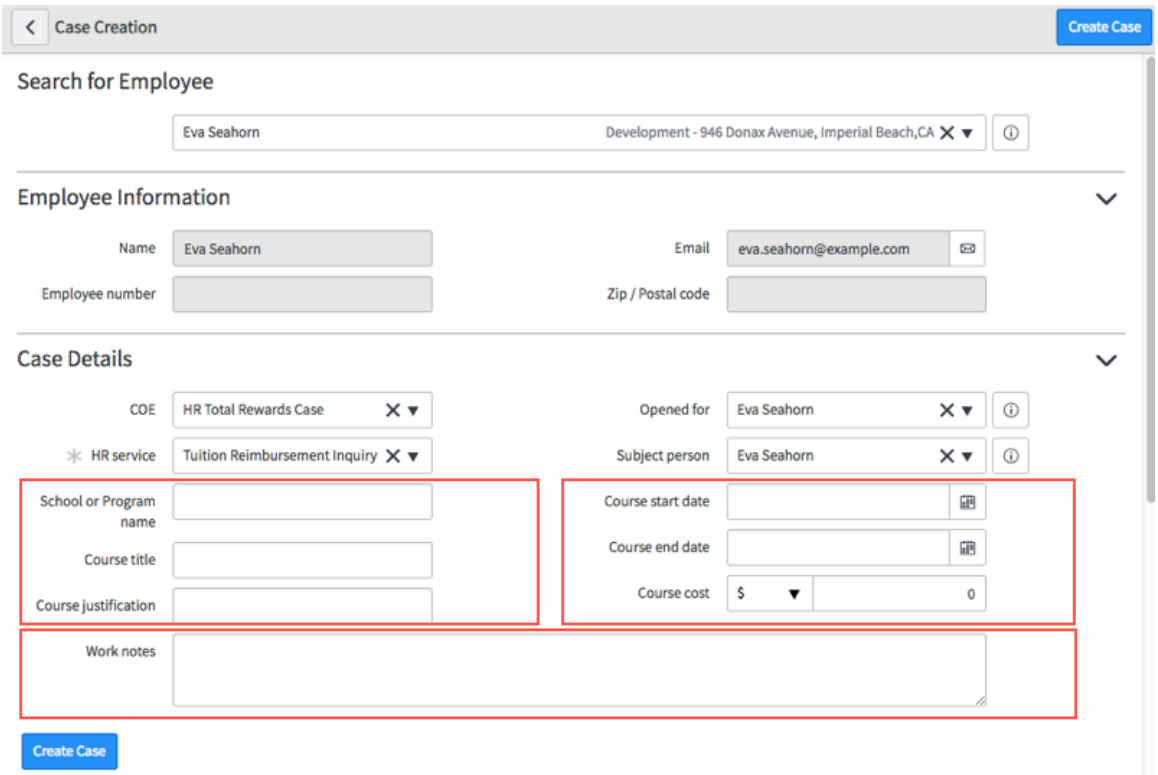
Once the configuration is complete, HR agents that select the tuition reimbursement request service from the **Create New Case** module will see the additional fields that you added. This enables the HR agent to collect the relevant information before beginning work on the case.



Configure the HR case form for an HR service

Configure the fields that appear on the HR case form for an HR service.

Before you begin

Role required: sn_hr_core.admin

About this task

This is the form that displays after an HR case is created. Configuration of the HR case form is a two-part process. First, you add or remove the additional fields on the HR service form. Second, you configure the HR case form for the HR Center of Excellence (COE) that the HR service is categorized under.

Procedure

1. Add or remove the fields in the **HR Service Additional Information** related list.

   a. Navigate to **HR Administration** > **HR Services** > **HR Service Configuration**.

   b. Open the HR service.

   c. In the **HR Service Additional Information** related list, fill in the fields as appropriate.

HR service additional information form fields and descriptions

Field	Description
Service table fields	Click the lock icon to view the list of available fields from the HR Center of Excellence (COE) that the HR service is

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Field	Description
	categorized under. Select the fields you want to appear on the HR case form for the HR service. For example, the 401(k) retirement plan enrollment inquiry HR service includes the **Benefit plan** field. **Note:** If you added a custom column to an HR COE table, you must create a UI policy action (**Visible** field is set to **False**) to hide it from other HR services that use that HR COE table. For example, if you add a custom column to the HR Payroll Case [sn_hr_core_case_payroll] table, it appears in all HR services related to this table. The custom column appears even after you add it for a specific HR service. For more information, see UI policies.
Subject person related lists	Click the lock icon to search for a subject person related list you want to appear on the HR case form for the HR service. For example, the 401(k) retirement plan enrollment inquiry HR service includes the **Retirement Benefits for Subject Person** related list.

d. Click **Update**.

2. Configure the HR case form for the HR Center of Excellence (COE) that the HR service is categorized under.
   a. Navigate to **HR Case Management** > **All HR Cases**, and open an HR case that is part of the same COE as the HR service.
   b. In the HR case form header, click the menu icon and navigate to **Configure** > **Form Layout**.
   c. Move the fields that you added to the HR service form to the **Selected** column.
   d. Click **Save**.

HR case form configuration examples

Examples on how to configure the HR case form for an HR service.

Example: Additional fields for 401(k) HR case forms

You are part of an enterprise HR organization using the HR Service Delivery application. You have several HR services related to 401(k) retirement benefits, and you want to add several additional fields to the HR case form, specifically the benefit plan and the list of retirement benefits for the subject person. This way, HR agents can have access to that information when working on that case type. Configuration of the HR case form for an HR service is a two-part process:

First, you need to add the fields and/or related lists you want to appear on the HR case form for that HR service in the **HR Service Additional Information** related list.

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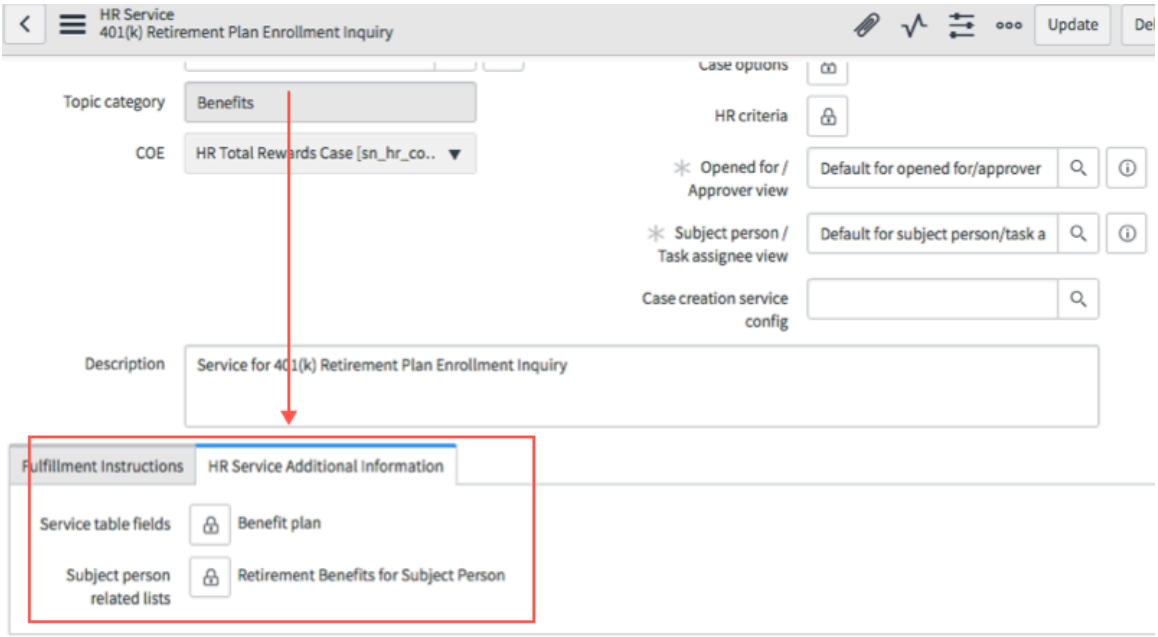
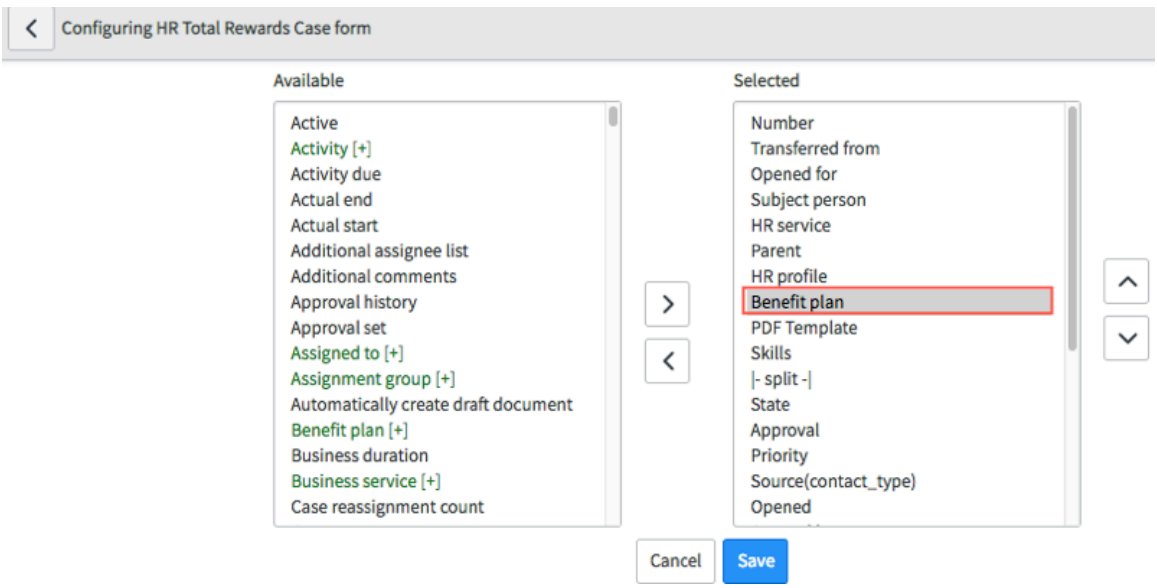


Second, you need to configure the HR case form for the COE that the HR service is categorized under. For the 401(k) retirement plan enrollment inquiry HR service, that COE is HR Total Rewards. Open any HR case for the HR Total Rewards COE. In the HR case form header, click the hamburger icon and navigate to **Configure** > **Form Layout**. Make sure the additional fields are included under the Selected column.



Once the configuration is complete, HR agents that are working on a 401(k) case will see the additional fields you added to the HR case form. This enables the HR agent to use the additional information as they work on the HR case.

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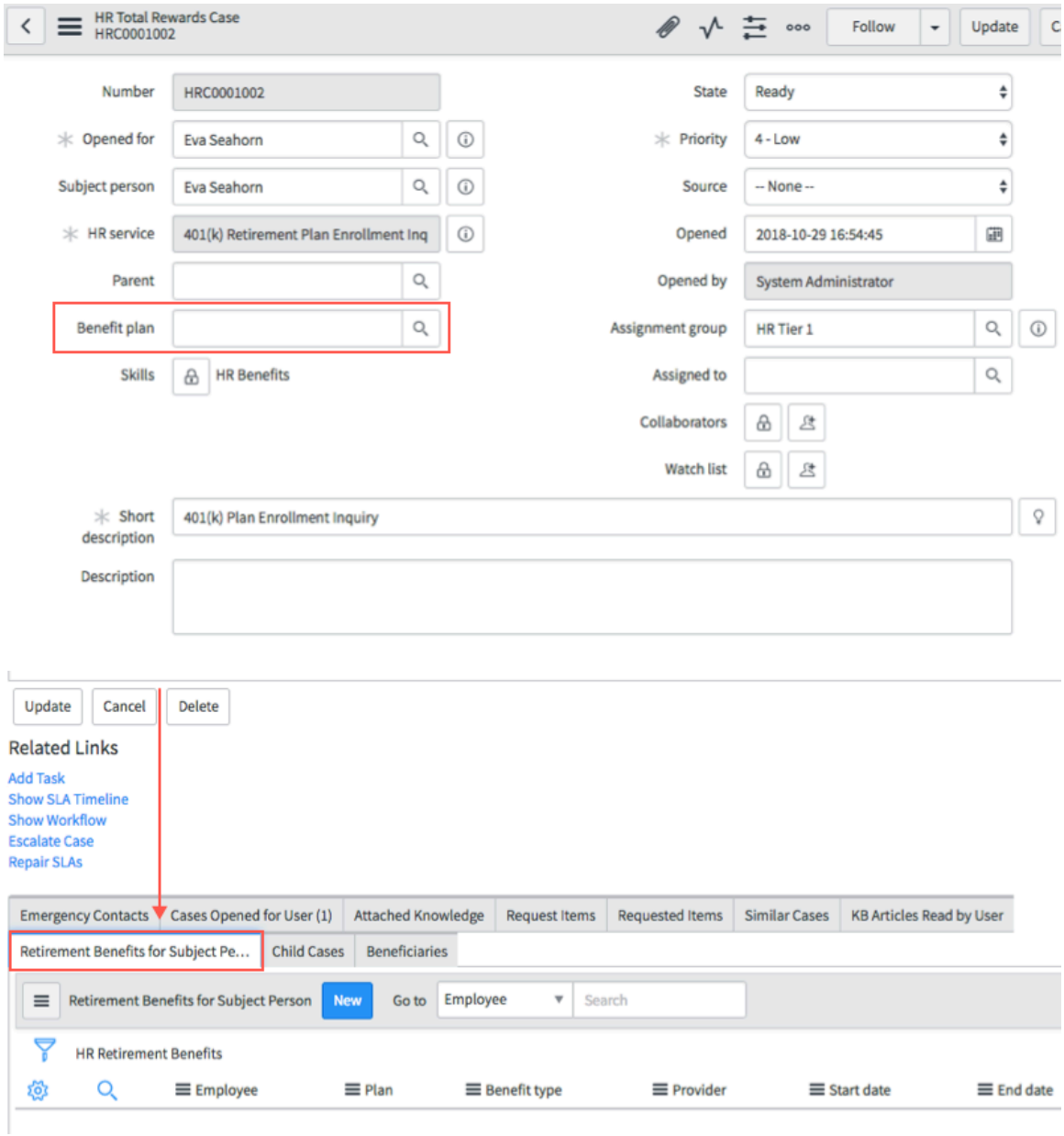

Example: Requesting an e-signature for an HR document template

You are configuring an HR service to request electronic signatures for HR document templates using HR e-signature. Unlike managed documents or knowledge articles, the HR document template that the signatory will sign is selected on the HR case form. Therefore, you need to add the **PDF Template** field to the HR case form for your HR service. This way, HR agents can select the HR document template that they want the employee to sign when creating that case type.

First, on the HR service form, under the **HR Service Additional Information** related list, add the **PDF Template** field.

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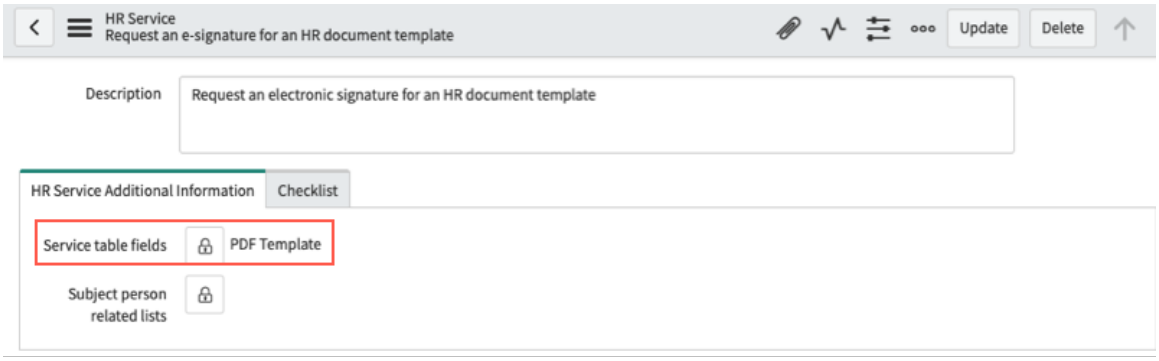
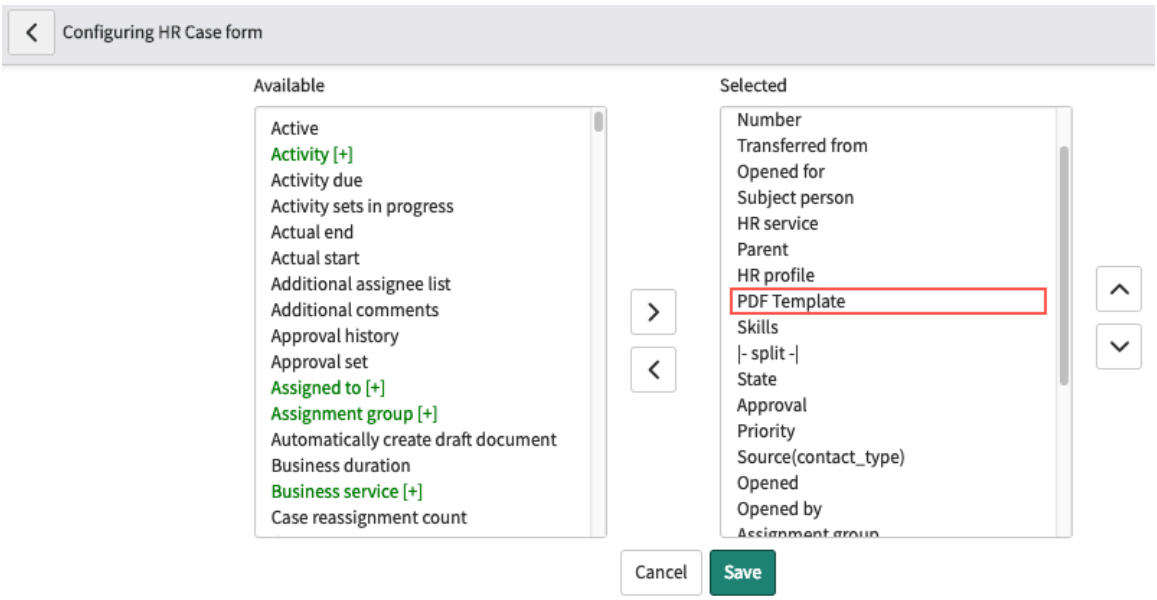


Second, create an HR case or open an existing case that is part of the COE that your HR service is categorized under. On the HR case form header, click the menu icon and navigate to **Configure** > **Form Layout**. Make sure that the **PDF Template** field is included under the Selected column.



Now, when an HR agent requests an electronic signature for an HR document template, the **PDF Template** field will appear on the HR case form for that HR service. This enables the HR agent to select an HR document template, preview it, and generate it so that the employee can then electronically sign the document.

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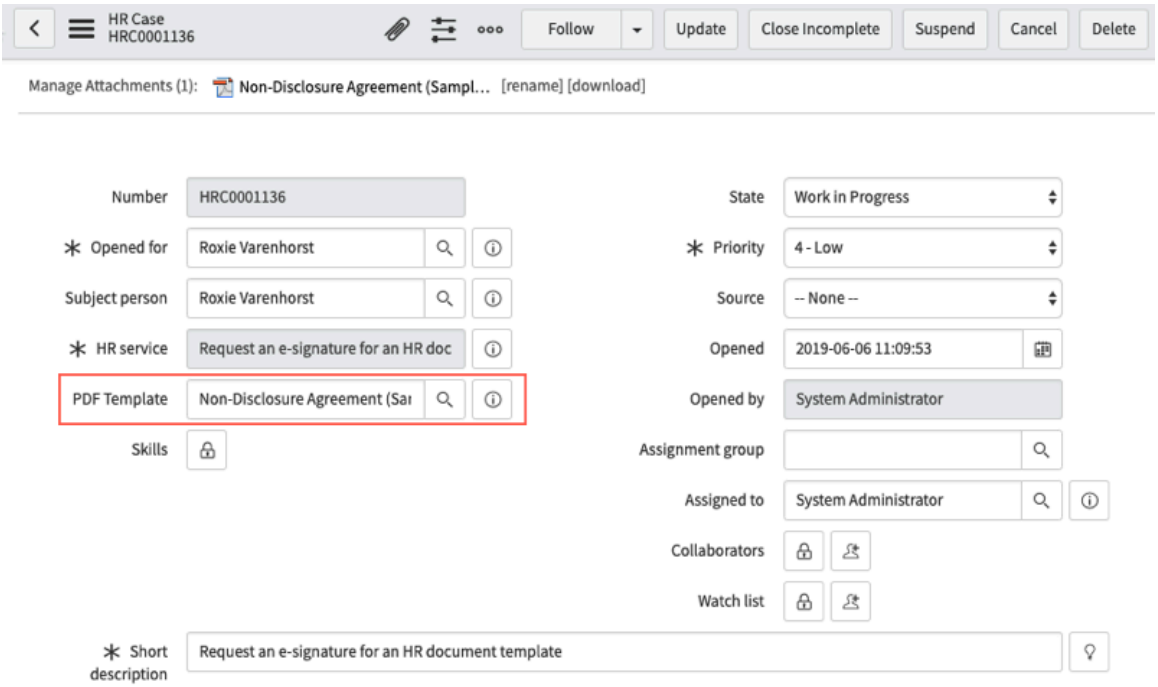

Add a custom column (field) to an HR table

You can add custom columns (fields) to an HR table.

Before you begin

Role required: sn_hr_core.admin

Note: When adding custom columns to an HR COE table, you must create a UI policy to hide it from other HR services that use that HR COE table.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the table you want to add a custom column to.
3. Under the **Columns** tab, select **New**.
4. Fill in the fields for the **Dictionary Entry**.

   Note: For more information on columns and fields, see Field administration.

5. Select **Save** or **Submit**.

   Note: If you added a custom column to an HR COE table, you must create a UI policy action (**Visible** field is set to **False**) to hide it from other HR services that use that HR COE table. For example, if you add a custom column to the HR Payroll Case [sn_hr_core_case_payroll] table, it appears in all HR services related to this table. The custom column appears even after you add it for a specific HR service. For more information, see UI policies.

Configure an HR case template

Create or modify an HR case template for an HR service to automatically populate fields on the HR case form when a request for that service is made.

Before you begin

Role required: sn_hr_core.admin

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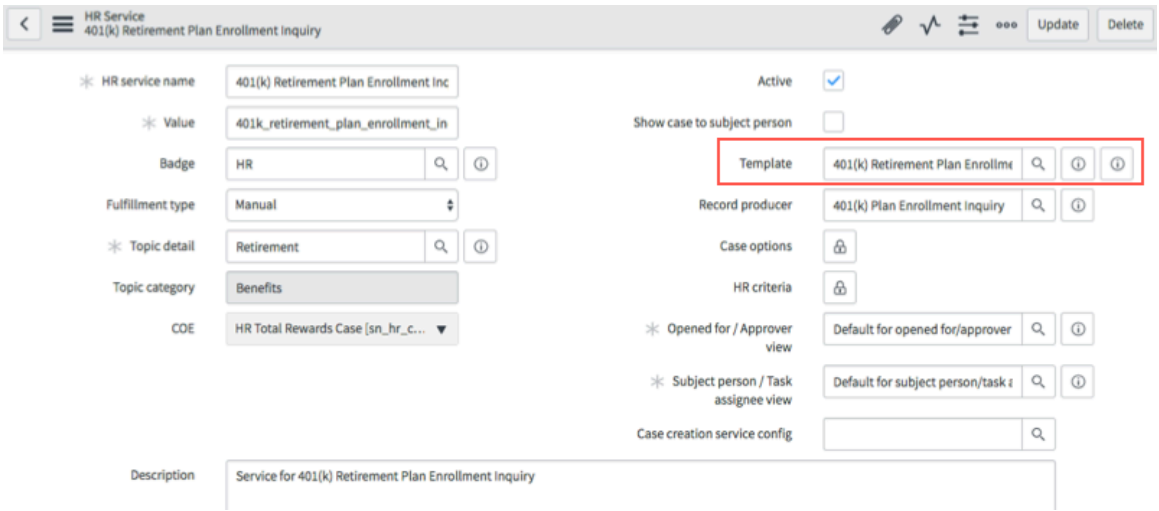
Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Open the HR service.
3. Open the HR template for that service.

> **Note:** To create a new HR case template for the HR service, click the **Lookup** icon, and then click **New**.



4. Fill in the fields on the form, as appropriate.

> **Note:** This is the new UI form view. To switch to the classic environment, click **Switch to Classic UI** in the form header.

HR Case Template form

Field	Description
Name	Name of the HR case template.
Active	Option to activate the HR case template for use.
COE	HR case table (COE) that the HR case is categorized under when a request for that HR service is made. **Note:** Make sure that the COE for the HR case template matches that of the associated HR service.
Owning group	Group that is responsible for the HR case template.
Short Description	Short description that appears on the HR case form when a request for that HR service is made.
Priority	Priority assigned to the HR case when a request for that HR service is made.
Assignment type	Assignment of the HR case when a request for that HR service is made. You can assign the HR case to a user, skill, or group. Select one of the following:

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Field	Description
	○ Named user: In the **Assigned to** field, select a user. ○ Skills/Assignment group: In the **Skills** or **Assignment Group** field, select a skill or group.
Use global descriptions for translations	Option to enable the use of global descriptions for translations. If selected, you can provide the short description and description for the HR case template in one or more languages. See Translations for HR cases and tasks for more information. You can use dynamic variables to personalize your short and global descriptions. Using dynamic variables in an HR task template works in: ○ HR tasks related to HR cases in the legacy UI or HR Service Delivery Agent Workspace ○ Employee Center Pro To-dos form ○ Lifecycle Events ticket form **Note:** Because some dynamic variables might provide personal information, use the sn_hr_core.task_template_variable_ignore system property to ensure privacy. For example, social security number (ssn) is excluded by default. You can add other variables to this system property to disable them but ensure they are comma separated with no spaces between each variable.
Add field	Fields to automatically populate on the HR case form when a request for that HR service is made. Select one or more fields from the **Add field** list and provide the desired values. For example, you can add the **State** field to set a default case state or add the **PDF Template** field to select a document for cases that require a document acknowledgement or signature. Any changes that you make to the template fields or values will take precedence over the original template values in the fields. **Note:** Select the Document Template option to associate a document template (of Document Templates [com.snc.document_templates] plugin) with an HR service.

5. Click **Submit** or **Update** on the HR template form.
6. Click **Update** on the HR service form.

Configure a record producer for an HR service

Make an existing HR service available for employee self-service by adding it to the HR service catalog.

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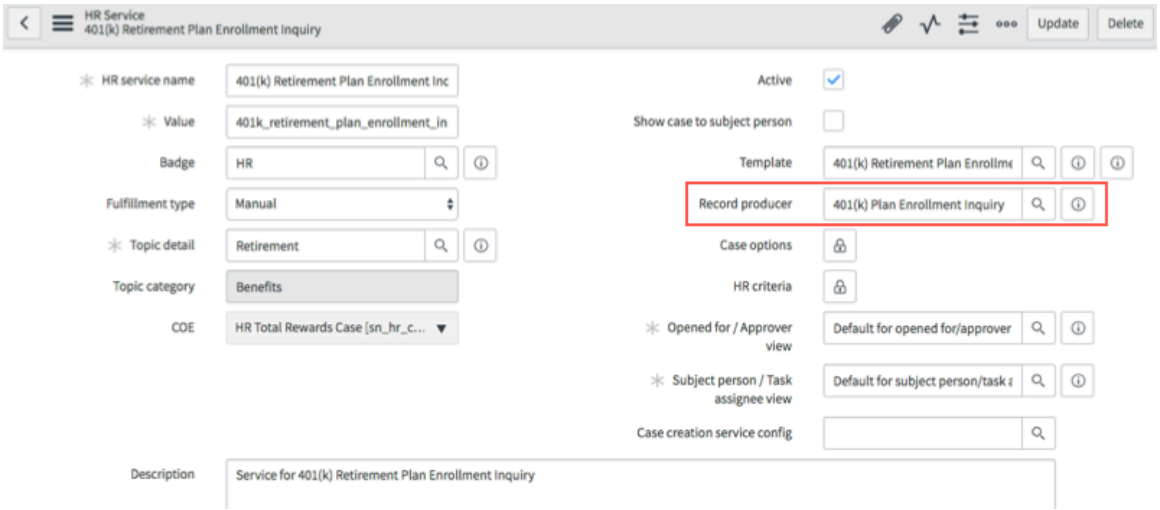
Before you begin
Role required: sn_hr_core.admin

About this task
To avoid creating duplicate services, do not create a new HR catalog item. Instead, configure a record producer to link your existing HR service to the HR service catalog. For optimal performance, use one record producer per HR service.

Procedure
1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Open the HR service.
3. Open the record producer for that service.

   Note: To create a new record producer for the HR service, click the **Lookup** icon, and then click **New**.



4. Fill in the fields on the form, as appropriate.

Record Producer form

Field	Description
Name	Name of the record producer.
Table name	HR case table that the record producer is associated with. **Note:** Make sure that the HR case table for the record producer matches that of the associated HR service.
Application	This field is automatically set to `Human Resources: Core`.
Active	Option to activate the record producer for use.
Preview link	Link to preview how the HR catalog item appears to users in the HR service catalog.
Expand help for all questions	

5. In the **What it will contain**, **Accessibility**, and **Generated Record Data** related lists, fill in the fields as appropriate.

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Since you are configuring the record producer from the HR service form, make sure to:

a. In the **What it will contain** related list, provide the following script:

```
new sn_hr_core.hr_ServicesUtil(current,
 gs).createCaseFromProducer(producer, cat_item.sys_id);
```

b. In the **Accessibility** related list, set the **Catalogs** field to **Human Resources Catalog**.

6. In the **Variables** related list, configure the variables for the HR catalog item as appropriate.

   Variables collect information from the user, and are used to ask questions and map answers to fields. You can add as many variables as you need to the HR catalog item. Commonly used variables types include:

   - Checkbox
   - Multiple Choice
   - Reference
   - Select Box
   - Single Line Text

   To learn more about the different types of variables and how to configure them, see Types of service catalog variables.

7. In the **Available For** and **Not Available For** related lists, configure the user criteria to apply to the HR catalog item as appropriate.
   User criteria controls which employees can access and request the HR catalog item in the HR service catalog. To learn more about user criteria and how they are used to control access to HR catalog items, see Set security for items and categories.

   Note: User criteria applied to the HR catalog item is employee-facing only, and has no relation to the HR criteria that is used to control what HR services an HR agent can request for an employee from the **Create New Case** module. See Configure an HR service for more information.

8. Click **Submit** or **Update** on the record producer form.
9. Click **Update** on the HR service form.

HR service catalog management

Empower employees to request HR services through the HR service catalog. The HR service catalog provides employees a catalog of HR services that they can request directly from HR, such as to add beneficiaries to a benefits plan, request a travel visa, or inquire about a discrepancy in their paycheck.

Employees can access the HR service catalog from a self-service portal such as the Employee Service Center. You can manage the setup and categorization of the HR service catalog, as well as configure the individual HR catalog items that populate it.

HR service catalog categorization

The HR service catalog is a collection of HR catalog items that employees can request directly from HR. The HR catalog items are organized into categories, which define the organizational structure for the catalog. For example, the items can be categorized by benefits, employee data management, employee relations, general, HR systems, payroll, talent management, and visas.

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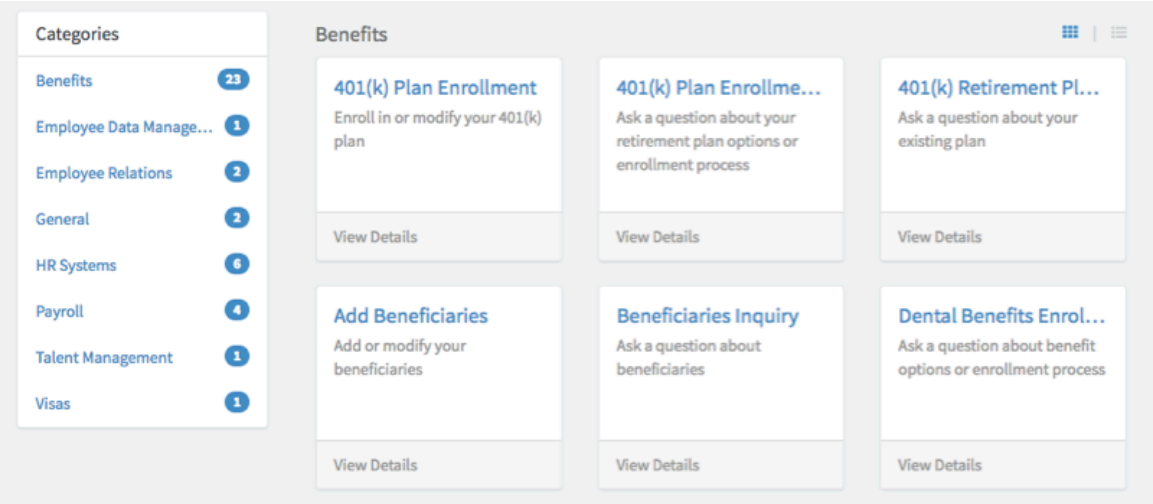
Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration instead. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.



You can manage the creation or modification of categories in the HR service catalog, as well as assign or remove HR catalog items from a category or assign or remove categories from an HR catalog item. To manage the categorization of HR catalog items in the HR service catalog, see HR service catalog categorization.

HR catalog item configuration

HR catalog items are the HR services that your organization makes available for employees to request directly from the HR service catalog. (Not all HR services need to be accessible to employees; some services are only initiated internally by HR agents. This means that all HR catalog items have a corresponding HR service, but not all HR services have a corresponding HR catalog item.) To configure the HR catalog items, see HR catalog item configuration.

Once an HR catalog item is published to the HR service catalog, it is available for employees to request. When an employee submits an HR catalog item request, an HR case is created.

Related topics

Service Catalog

HR service catalog categorization

HR catalog items in the HR service catalog are organized into categories. The categories define the organizational structure for the catalog so that employees can more easily browse and request the HR services they need.

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You can manage the creation or modification of categories in the HR service catalog, as well as assign or remove HR catalog items from a category or assign or remove categories from an HR catalog item.

Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration instead. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

Create an HR catalog category

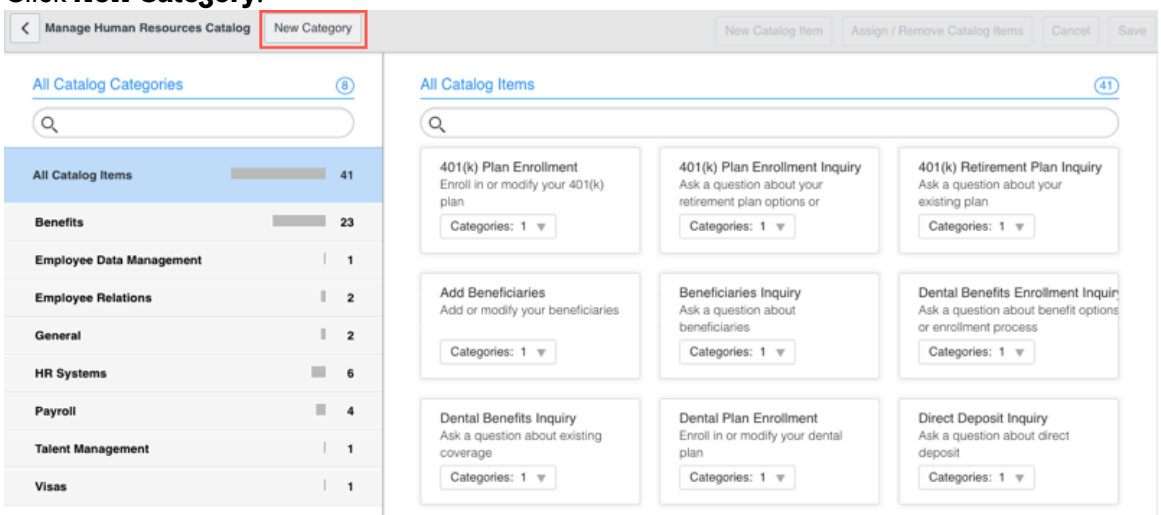
Create a new category in the HR service catalog.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Click **New Category**.



3. Provide the category name and description.
4. Click **Submit**.

Edit an HR catalog category

Edit an existing category in the HR service catalog.

Before you begin

Role required: sn_hr_core.admin

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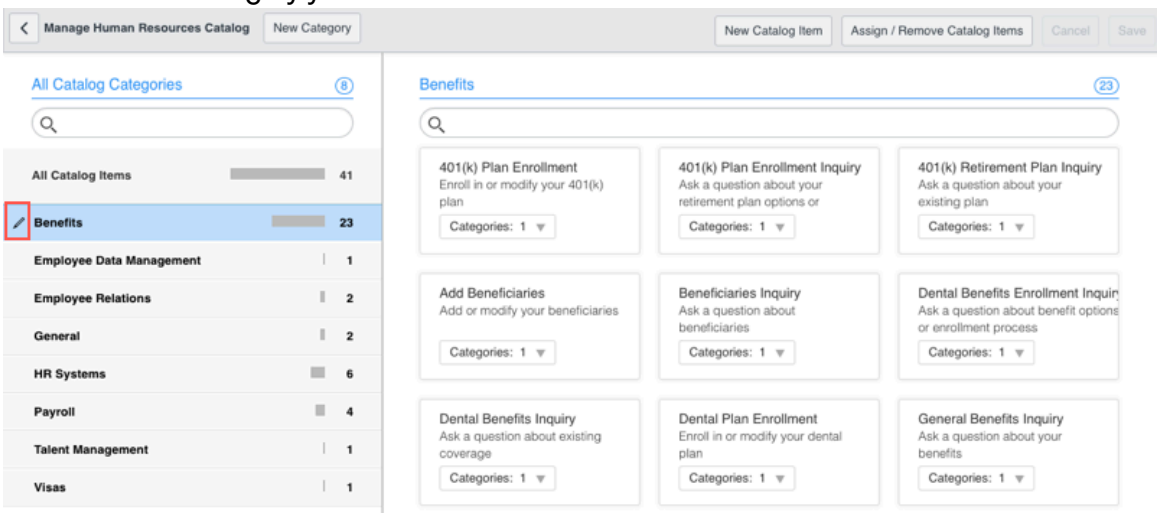
Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Hover over the category you want to edit and click the edit icon.



3. Modify the category name, active state, or description as needed.
4. Click **Submit**.

Assign or remove HR catalog items from a category

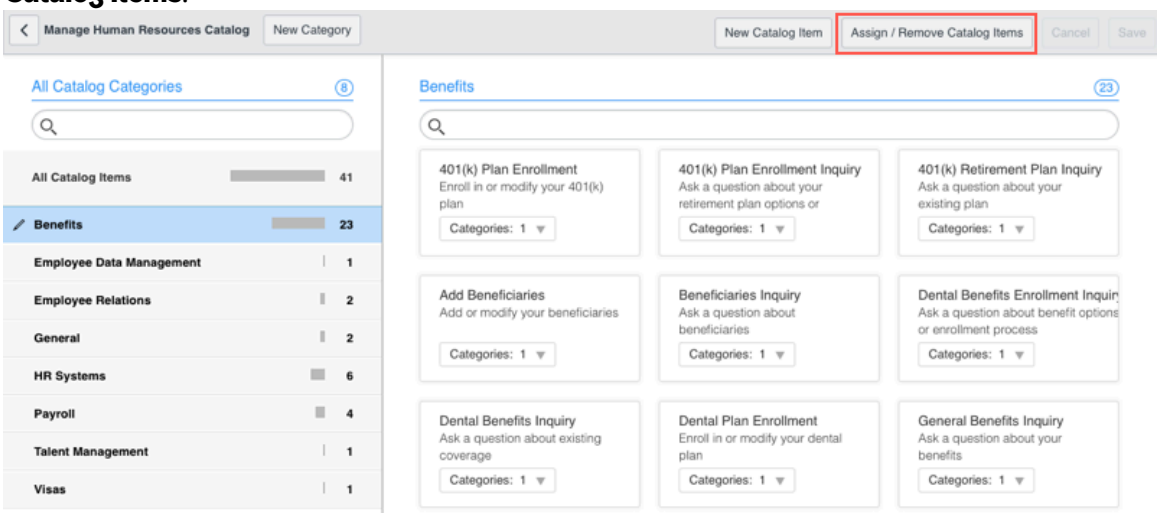
Assign or remove one or more HR catalog items from a category in the HR service catalog.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Select the category you want to assign or remove HR catalog items, and click **Assign / Remove Catalog Items**.



3. Select the HR catalog items to assign and deselect the items to remove.

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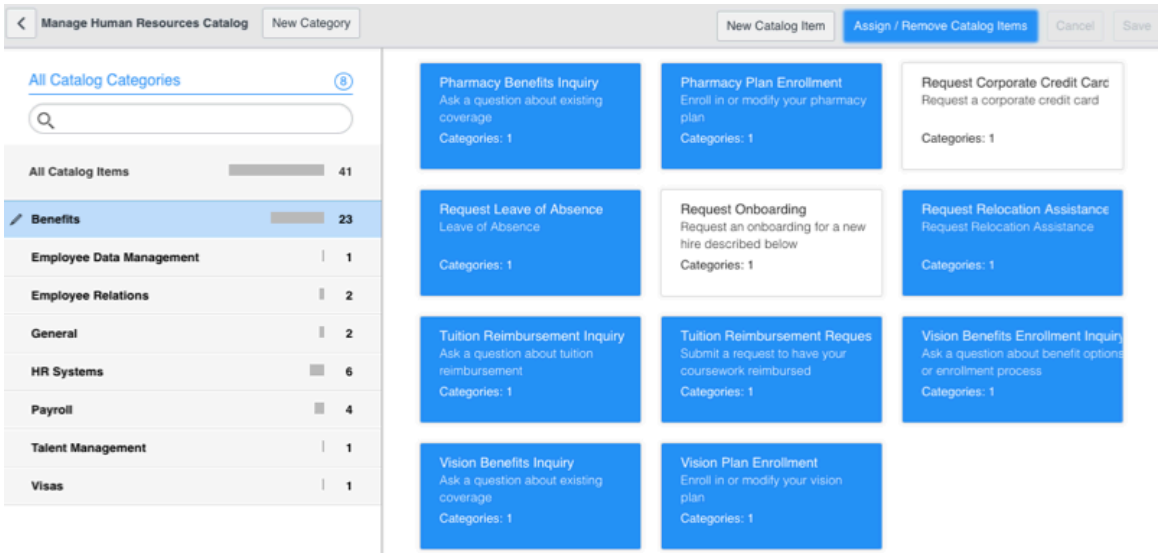


4. Click **Save**.

Assign or remove categories for an HR catalog item

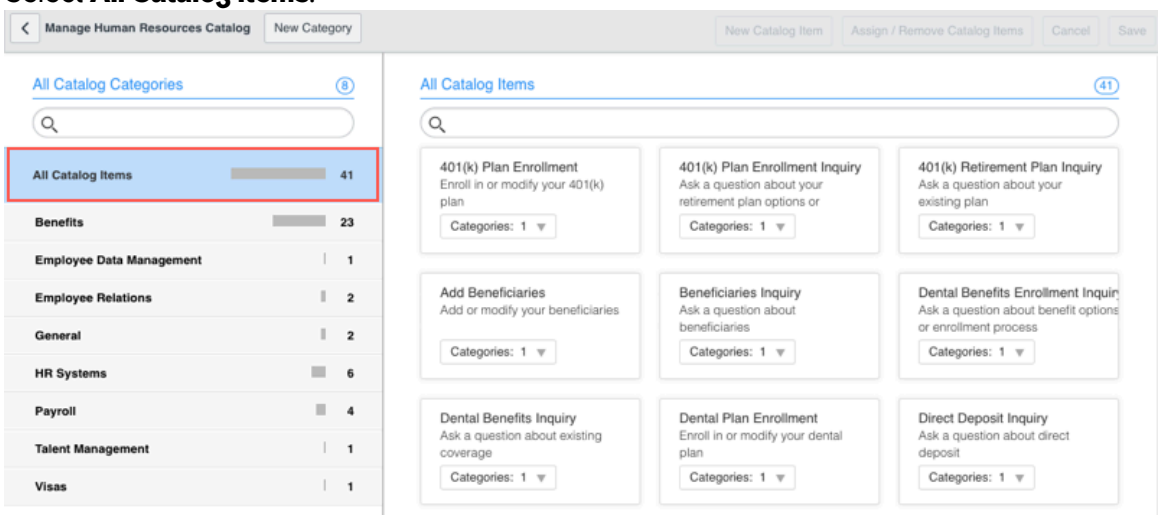
Assign or remove categories for an HR catalog item in the HR service catalog.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Select **All Catalog Items**.



3. Locate the HR catalog item you want to assign or remove categories, and open the **Categories** list.
4. Select the categories to assign and deselect the categories to remove.

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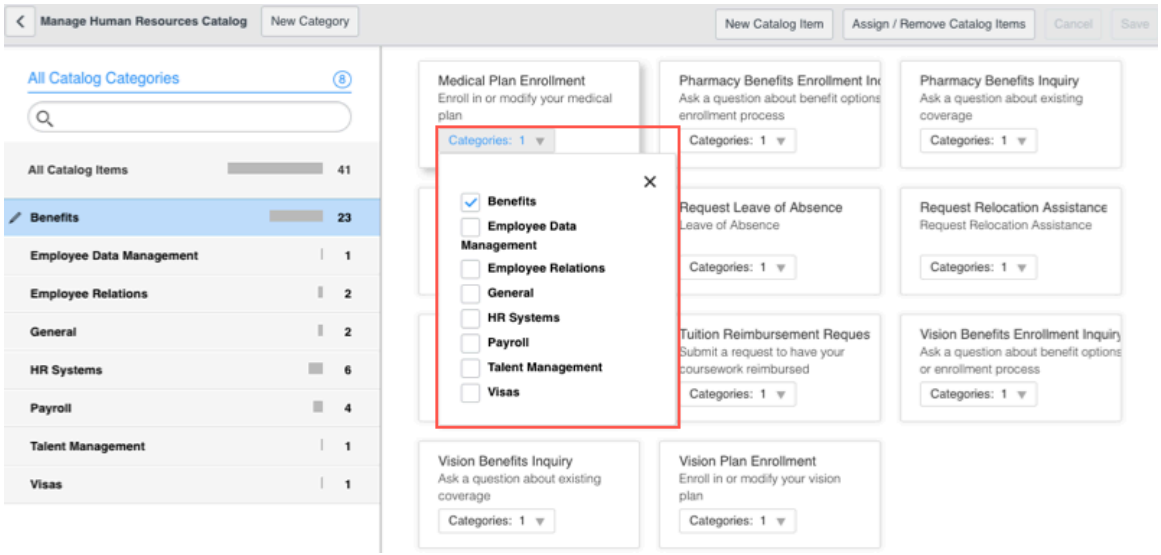

5. Click **Save**.

HR catalog item configuration

HR catalog items are the HR services that your organization makes available for employees to request directly from the HR service catalog.

You can configure an HR catalog item (also known as a record producer) to define the required fields and how the item appears in the catalog to employees. You can configure an HR case template to automatically populate fields on the HR case form when a request for that item is made. And you can link to relevant knowledge articles or managed documents for employees to reference.

Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration instead. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

Create an HR catalog item

Create an HR catalog item so that employees can request the HR service directly from the HR service catalog through a self-service portal such as the Employee Service Center. When you create a new HR catalog item, a corresponding HR service, record producer (synonymous to HR catalog item), and HR case template are automatically created.

Before you begin

Role required: sn_hr_core.admin

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Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Select a category.
3. Click **New Catalog Item**.

Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

4. Fill in the fields on the form.

New Catalog Item form

Field	Description
Name	Name of the HR catalog item.
Short description	Short description of the HR catalog item.
Case type	Name of the HR Center of Excellence (COE) that the corresponding HR service and record producer are categorized under. **Note:** The COEs are organized around functional disciplines and are extensions of the HR Case [sn_hr_core_case] table. To learn more, see HR service categorization.
Topic Category	Name of the HR topic category that the corresponding HR service and record producer are categorized under. **Note:** The HR topic category is the first-level of categorization for HR services. To learn more, see HR service categorization.
Topic Detail	Name of the HR topic detail that the corresponding HR service and record producer are categorized under. **Note:** The HR topic detail is the second-level of categorization for HR services. To learn more, see HR service categorization.

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Field	Description
Assignment group	Default assignment group of the HR catalog item.
Priority	Default priority of the HR catalog item.

5. Click **Submit**.

> **Note:** If you click **Publish**, the HR catalog item will be available for employees to request in the HR service catalog.

What to do next

The creation of an HR catalog item automatically creates a corresponding HR service, record producer (synonymous to HR catalog item), and HR case template. Configure the record producer and HR case template before you publish the HR catalog item to the HR service catalog.

Edit the record producer for an HR catalog item

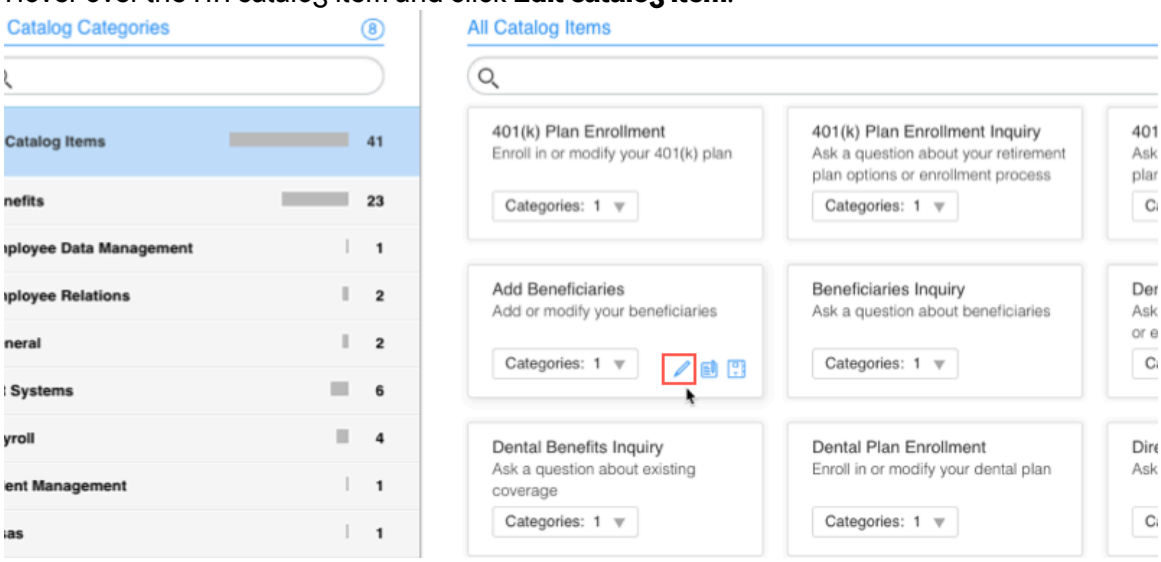
Edit the record producer for an HR catalog item to define the required fields and how the item appears in the HR service catalog to employees.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Hover over the HR catalog item and click **Edit catalog item**.



3. Fill in the fields on the form, as appropriate.

Record Producer form

Field	Description
Name	Name of the record producer.
Table name	HR case table that the record producer is associated with.

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Field	Description
	Note: Make sure that the HR case table for the record producer matches that of the associated HR service.
Application	This field is automatically set to `Human Resources: Core`.
Active	Option to activate the record producer for use.
Preview link	Link to preview how the HR catalog item appears to users in the HR service catalog.
Expand help for all questions	

4. In the **What it will contain**, **Accessibility**, and **Generated Record Data** related lists, fill in the fields as appropriate.
   You can provide a short description and description, configure a script, add images, define a template, and more.
5. In the **Variables** related list, configure the variables for the HR catalog item as appropriate.

   Variables collect information from the user, and are used to ask questions and map answers to fields. You can add as many variables as you need to the HR catalog item. Commonly used variables types include:

   - Checkbox
   - Multiple Choice
   - Reference
   - Select Box
   - Single Line Text

   To learn more about the different types of variables and how to configure them, see Types of service catalog variables.
6. In the **Available For** and **Not Available For** related lists, configure the user criteria to apply to the HR catalog item as appropriate.
   User criteria controls which employees can access and request the HR catalog item in the HR service catalog. To learn more about user criteria and how they are used to control access to HR catalog items, see Set security for items and categories.

   Note: User criteria applied to the HR catalog item is employee-facing only, and has no relation to the HR criteria that is used to control what HR services an HR agent can request for an employee from the **Create New Case** module. See Configure an HR service for more information.

7. Click **Update**.

Edit the HR case template for an HR catalog item

Edit the HR case template for an HR catalog item to automatically populate fields on an HR case form when a request for that item is made.

Before you begin

Role required: sn_hr_core.admin

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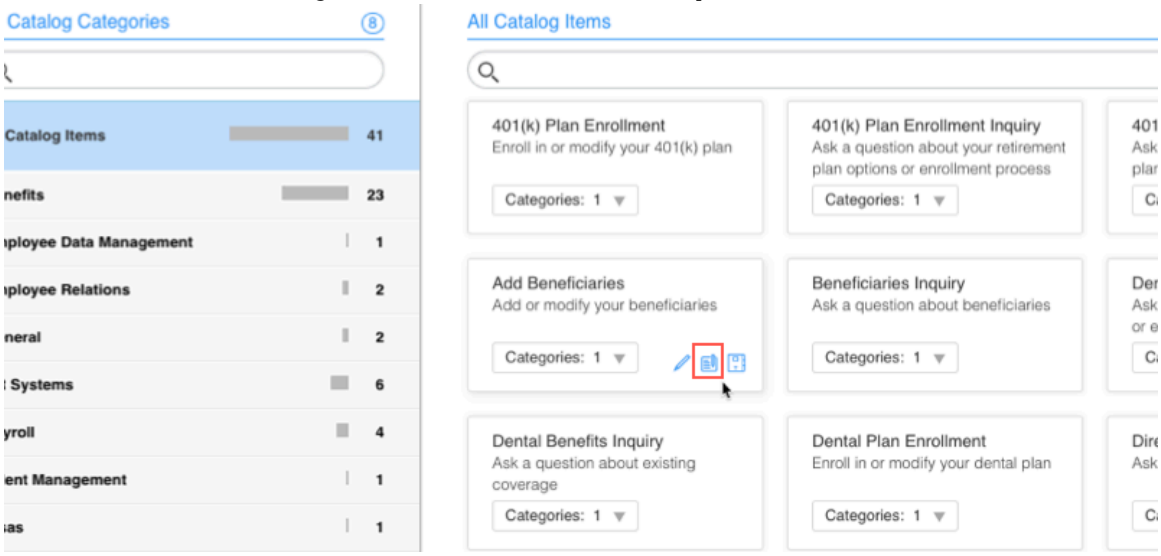
Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Hover over the HR catalog item and click **Edit Case Template**.



3. Fill in the fields on the form, as appropriate.

> **Note:** This is the new UI form view. To switch to the classic environment, click **Switch to Classic UI** in the form header.

HR Case Template form

Field	Description
Name	Name of the HR case template.
Active	Option to activate the HR case template for use.
COE	HR case table (COE) that the HR case is categorized under when a request for that HR service is made. **Note:** Make sure that the COE for the HR case template matches that of the associated HR service.
Owning group	Group that is responsible for the HR case template.
Short Description	Short description that appears on the HR case form when a request for that HR service is made.
Priority	Priority assigned to the HR case when a request for that HR service is made.
Assignment type	Assignment of the HR case when a request for that HR service is made. You can assign the HR case to a user, skill, or group. Select one of the following: ○ Named user: In the **Assigned to** field, select a user. ○ Skills/Assignment group: In the **Skills** or **Assignment Group** field, select a skill or group.
Use global descriptions for translations	Option to enable the use of global descriptions for translations. If selected, you can provide the short description and description for the HR case template in one

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Field	Description
	or more languages. See Translations for HR cases and tasks for more information. You can use dynamic variables to personalize your short and global descriptions. Using dynamic variables in an HR task template works in: ○ HR tasks related to HR cases in the legacy UI or HR Service Delivery Agent Workspace ○ Employee Center Pro To-dos form ○ Lifecycle Events ticket form **Note:** Because some dynamic variables might provide personal information, use the sn_hr_core.task_template_variable_ignore system property to ensure privacy. For example, social security number (ssn) is excluded by default. You can add other variables to this system property to disable them but ensure they are comma separated with no spaces between each variable.
Add field	Fields to automatically populate on the HR case form when a request for that HR service is made. Select one or more fields from the **Add field** list and provide the desired values. For example, you can add the **State** field to set a default case state or add the **PDF Template** field to select a document for cases that require a document acknowledgement or signature. Any changes that you make to the template fields or values will take precedence over the original template values in the fields. **Note:** Select the Document Template option to associate a document template (of Document Templates [com.snc.document_templates] plugin) with an HR service.

4. Click **Update**.

Link knowledge articles or managed documents to an HR catalog item

Link knowledge articles or managed documents to an HR catalog item so that employees can refer to the articles or documents when requesting the service through the HR service catalog.

Before you begin

Role required: sn_hr_core.admin

For example, an HR catalog item for a beneficiaries inquiry can include links to knowledge articles on who can be named as a beneficiary, the difference between a primary and contingent beneficiary, and so on.

For the link to display on the HR catalog item, make sure the item has a variable that is:

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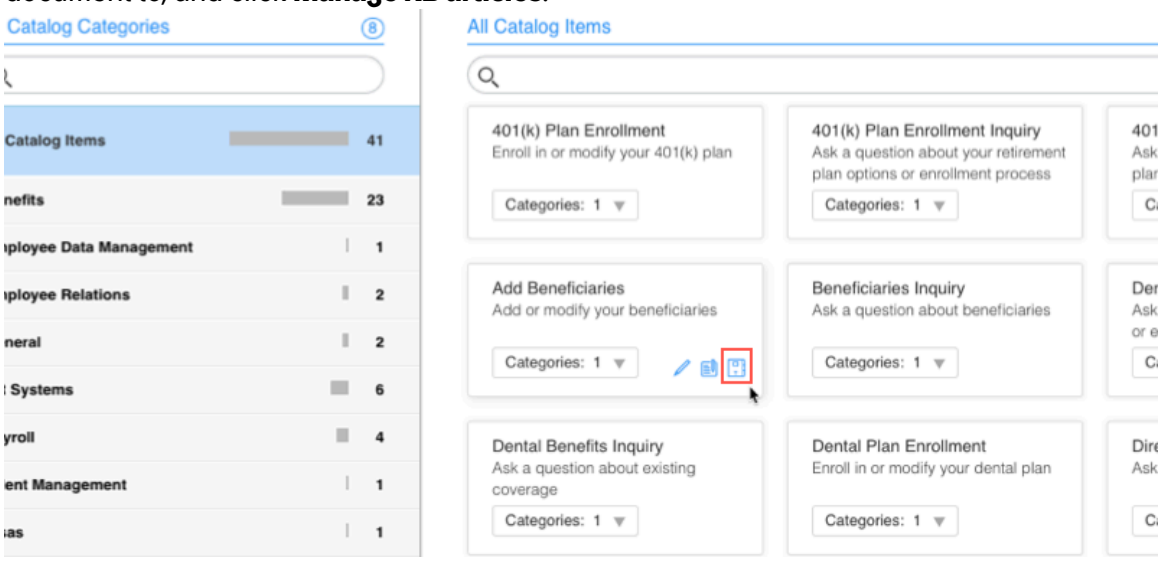
- **Type** set to **Macro with Label**
- In the **Type Specifications** related list, with **Widget** set to **HRI Catalog to KB Article Display**

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **Manage HR Catalog**.
2. Hover over the HR catalog item that you want to add the knowledge article or managed document to, and click **Manage KB articles**.



3. Click **New** or open a record to add or edit a link.
4. Fill in the fields on the form.

Catalog Item to KB Link form

Field	Description
Name	Name of the HR catalog item to knowledge article or managed document link.
Catalog Item	This field is automatically set to the HR catalog item.
Knowledge Article	Name of the knowledge article.
Managed Document	Name of the managed document.
Active	Check box to activate the link for use.
Order	Order number for the link. Lowered numbered links are displayed before higher numbered links.

5. Click **Submit** or **Update**.
   The knowledge article will display under the **Related Knowledge Documents** section when employees open the HR catalog item in the HR catalog.

HR fulfillment instructions

HR fulfillment instructions provide focused and targeted information on how an agent can complete an HR case faster and more efficiently for HR Service Delivery Agent Workspace and legacy HR Case Management.

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You can configure fulfillment instructions to appear for an HR case by group, HR service, table, conditions, or a combination of multiple requirements. For example, you can configure a different set of fulfillment instructions to appear for HR cases that are based on the employee's location.

Using the condition builder, you can dynamically change what fulfillment instructions appear for an HR case when it is transferred from one HR service to another. For example:

- An HR case is created as a General Inquiry with specific fulfillment instructions.
- Later, this HR case is transferred to a Leave of Absence request. New fulfillment instructions appear for the transferred case.

Checklist

Add a checklist to ensure the agent does not skip or miss any of the fulfillment instructions. To add a checklist to an HR case, use HR services. See HR service configuration.

Configure HR fulfillment instructions

Use HR fulfillment instructions to provide focused and targeted instructions for an HR case.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Fulfillment Instructions**.
2. Click **New** or open an existing fulfillment instruction.
3. On the form, fill in the fields.

HR fulfillment instructions

Field	Descriptions
Name	Label of the fulfillment instructions.
Table	Name of the table that contains the fulfillment instructions for an HR case.
Condition	Conditions under which the fulfillment instructions are made available for an HR case. The conditions determine which fulfillment instructions appear for an HR case. For example, you can set conditions that an HR case has different fulfillment instructions by location. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global. For additional information, see Condition builder.
Active	Fulfillment instructions that are active and available for use.

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Field	Descriptions
Order	Order that the fulfillment instructions appear for an HR case in relation to other fulfillment instructions.
Instructions	Text that provides instructions on how to complete the HR case. Use the tool suite to format the instructions.
Knowledge articles	Knowledge articles that you want to attach to the fulfillment instructions. HR agents use knowledge articles as reference when fulfilling an HR case. **Note:** Knowledge articles are visible only to HR agents and not to employees.

Note: Previously, Fulfillment Instructions and Checklists were configured from HR services. Checklists are still configured from HR services. For more information on checklists, see Checklists in HR cases.

4. Click **Submit** or **Update**.

HR templates

HR templates allow you to automatically populate fields on an HR case or task form. You can configure HR templates for HR services, HR catalog items, HR service activities, and lifecycle event activities.

Configuration

For	Configure
HR service	Configure an HR case template to automatically populate fields on the HR case form when a request for that service is made.
HR catalog item	Edit the HR case template for an HR catalog item to automatically populate fields on the HR case form when a request for that item is made.
HR service activity	Configure an HR task template to automatically populate fields on the HR task form when the HR service activity is triggered.
Lifecycle event activity	Configure an HR task template to automatically populate fields on the HR task form when the lifecycle event activity is triggered.

Related topics

Form templates

Configure an HR task template

Create or modify an HR task template to automatically populate fields on the HR task form when that task is generated. You can configure an HR task template for an HR service or lifecycle event activity.

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Before you begin
Role required: sn_hr_core.admin

Procedure
1. Choose one of the following.

Option	Description
HR service activity	**a.** Navigate to **HR Administration** > **HR Services** > **HR Service Configuration**, and open the HR service. **Note:** Make sure **Fulfillment type** is set to `Service Activity`. **b.** In the **Service Activities** list at the bottom of the HR service form, open the service activity. **Note:** Make sure **Activity type** is set to `Task`. **c.** In the **Child task template** field, click the Lookup icon.
(Enterprise Onboarding and Transitions only) Lifecycle event activity	**a.** Navigate to **Lifecycle Events** > **Administration** > **Activities**, and open the lifecycle event activity. **Note:** Make sure **Activity type** is set to `Employee` or `Fulfiller`. For fulfiller types, make sure **Fulfiller activity** is set to HR `Task`. **b.** In the **HR task template** field, click the Lookup icon.

2. Click **New** or open a record.

3. Fill in the fields on the form, as appropriate.

HR Task Template form

Field	Description	
Name	Name of the HR task template.	
Active	Option to activate the HR task template for use.	
Owning group	Group that is responsible for the HR task template.	
Short Description	Short description that appears on the HR task form when the task is generated.	
Optional	Option to mark the HR task as optional. In the Tasks/To-Dos the Type indicator lets you filter the tasks based on the Required or Optional selection.	
HR task type	Type of the HR task. Select one of the following:	
	HR Service	An HR service fulfills the HR task. In the **HR Service** field, select an HR service.

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Field	Description	
	Submit Catalog Item	A catalog item fulfills the HR task. In the **Catalog Item** field, select an active catalog item.
	Submit Order Guide	An order guide fulfills the HR task. In the **Order Guide** field, select an order guide.
	Collect employee input	Collects information from employees. In the **Employee form** field, select the employee form that the user will fill out or verify. **Note:** Employee forms are questionnaires built using the survey designer to collect information from employees. See Collect employee input for more information.
	Checklist	In the **Checklist Items** field, provide the checklist items.
	E-signature	User electronically signs a document. In the **E-signature template** field, select the e-signature template to use. **Note:** ○ E-signature is a scoped application that enables users to sign managed documents, knowledge articles, or HR document templates with their typed or drawn signature, credentials, or as an acknowledgment. See HR e-signature for more information. ○ If HR document template is the document type of the e-signature template, you must select the HR document template that the signatory will sign on the HR case form. See Select an HR document template for an e-signature task for more information.
	Credential	Prompts the user to login with their credentials to acknowledge conditions and terms related to their signature. To add text that explains what their login credentials mean, add the **Acknowledgment text** field. To add a document, add the **Acknowledgment document** field.

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Field	Description	
		Note: ○ This option is only available for existing customers that have not yet migrated to e-signature. See Migrate existing HR task templates and open HR tasks to e-signature for more information. ○ Starting with the Australia release, the HR task type: Credential will be hidden, but will continue to be supported. E-signature provides the latest experience for this functionality. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
	E-Signature	Prompts the user to sign a document. To add text that explains what their signature means, add the **Acknowledgment text** field. To add a document, add the **Acknowledgment document** field. **Note:** ○ This option is only available for existing customers that have not yet migrated to e-signature. See Migrate existing HR task templates and open HR tasks to e-signature for more information. ○ Starting with the Australia release, the HR task type: E-signature (e_signature) will be hidden, but will continue to be supported. E-signature provides the latest experience for this functionality. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
	Mark When Complete	Notify the user a **Completed** button appears on the HR Service Portal. Use the **Short description** field to provide details about this task. **Note:** **Mark When Complete** changes the state of the task to **Closed Complete**.
	Sign Document	Requests the subject person to edit or sign a document. An example is sending an

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Field	Description	
		education agreement to be signed for tuition reimbursement. This option is only available for existing customers that have not yet migrated to e-signature. See Migrate existing HR task templates and open HR tasks to e-signature for more information. **Note:** The document must be included in the HR case template in the **PDF Template** field. See Configure an HR case template. To add text that explains what their signature means, add the **Acknowledgment text** field. To add a document, add the **Acknowledgment document** field. Acknowledgment text entered on the HR document template overrides text written here. See or . **Note:** Starting with the Australia release, HR task type: Sign Document will be hidden, but will continue to be supported. E-signature provides the latest experience for this functionality. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
	Take Survey	In the **Survey** field, select a survey that the user is assigned to take.
	Upload Documents	Requests the person assigned to the task to upload documents. Examples are receipts, course registration, or transcripts for tuition reimbursement. Use the **Short description** field to provide instructions. **Note:** The task must be in **Ready** or **Work in Progress**.
	URL	In the **URL** field, provide a URL that the user acknowledges when accessed.
	View Video	In the **URL** field, embed code/URL that the user is requested to view.
Assignment type	Assignment of the HR task when the task is generated. You can assign the HR task to the employee or fulfiller. Select one of the following:	
	Employee	Select one of the following:

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Field	Description	
		○ Parent case subject person: Assign the task to the subject person of the parent case. ○ Parent case opened for: Assign the task to the opened for person on the parent case. ○ User from case: Assign the task to a user from the case. ○ Named user: Assign the task to a specific user.
	Fulfiller	Select one of the following: ○ Parent case assigned to: Assign the task to the person the parent case is assigned to. ○ Named user: Assign the task to a specific user ○ User from case: Assign the task to a user from the case. ○ Skills/Assignment group: Select the skills and group you want assigned to the task.
Due date	Due date of the HR task. Select one of the following: ○ Based on task assignment date ○ Based on parent case table	
Set reminder	Select to configure a reminder to send to the assignee.	
Reminder template	Select a relevant mail template.	
When to send (days)	Specify the number of days before the due date to send the initial reminder.	
Interval (days)	Enter the number of days between each reminder.	
State	State of the HR task when the task is generated. Select one of the following: ○ Draft ○ Ready ○ Work in Progress ○ Closed Complete ○ Closed Incomplete ○ Cancelled ○ Skipped	
Task support team	Task support team for the HR task. The Task support team field defines the HR agent or queue that picks up any communication about the task when a user selects the Ask a question link. Select one of the following:	
	None	No task support team.

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Field	Description	
	Users and groups	Select users from the parent case or HR groups as the task support team for the HR task.
	Queue	Select a chat queue as the task support team for the HR task.
Use global descriptions for translations	Option to enable the use of global descriptions for translations. If selected, you can provide the short description and description for the HR task template in one or more languages. See Translations for HR cases and tasks for more information. Check to show the **Global short description** and **Global description** fields. You can select a table (top, right) from the list and the associated dynamic variables from that table appear. You can add dynamic variables when creating your text to personalize the task. To use dynamic variables in the **Global short description** field, copy and paste the dynamic variables from the **Global description** field. **Note:** Because some dynamic variables might provide personal information, use the sn_hr_core.task_template_variable_ignore system property to ensure privacy. For example, social security number (ssn) is excluded by default. You can add other variables to this system property to disable them but ensure they are comma separated with no spaces between each variable.	
Add field	Fields to automatically populate on the HR task form when the task is generated. Select one or more fields from the **Add field** list and provide the desired values. When you add **Rich Description**, you can select a table (top, right) and the associated dynamic variables from that table appear. You can add dynamic variables when creating your text to personalize the task. **Note:** Because some dynamic variables might provide personal information, use the sn_hr_core.task_template_variable_ignore system property to ensure privacy. For example, social security number (ssn) is excluded by default. You can add other variables to this system property to disable them but ensure they are comma separated with no spaces between each variable.	

4. Click **Submit** or **Update**.

Manage HR roles

Roles control access to features and capabilities in modules in the HR application.

The HR Service Delivery Scoped app can help prevent users outside of the HR organization from accessing HR data.

Scoped roles for both HR case workers and HR clients (employees, contractors, alumni, and others) grant access to HR services. Users without an HR scoped role typically cannot view HR cases or HR profile information. For information on all the roles installed with Case

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and Knowledge Management plugin, see Components installed with Case and Knowledge Management.

Only the HR Administrator [sn_hr_core.admin] can assign scoped HR roles.

To configure your system, you must log in as a System Administrator [admin]. The HR Administrator [sn_hr_core.admin] role is contained in the System Administrator [admin] role. The combination of these two roles allows a user to perform all tasks associated with configuring your system.

After system configuration, ensure that only the HR Administrator [sn_hr_core.admin] role has access to sensitive information. Remove the HR Administrator role from System Administrator [admin] role to help prevent the System Administrator from viewing sensitive HR information via forms, lists and UI.

After granting access to a role, all the groups or users assigned to the role also have access. Roles can contain other roles, and grants access to any role that contains it.

Note: IT System Administrators (admin) can still impersonate ServiceNow users. When impersonating a user with an HR scope-protected role, an admin cannot access features granted by that role unless the admin already possesses those HR scope-protected roles. For more information on impersonating a user, see Impersonate a user.

HR Performance Analytics

To configure the Performance Analytics (PA) dashboard, assign the Performance Analytics Administrator [pa_admin] role to the HR Administrator [sn_hr_core.admin] role.

Note: Only the System Administrator [admin] can assign PA roles to employees.

Roles

Role	Description
System Administrator [admin]	Also known as admin and IT admin. Within the global scope of the application, has access to all system features, functions, and data, regardless of security constraints. • Grant users with the delegated developer role [delegated_developer]. • Build export sets, move content between instances (development to production), and clone instances. • Run guided setup or modules to manage: Company-wide objects like user, departments, and locations.
HR Administrator [sn_hr_core.admin]	This role can: • Assign users any of the HR roles. • View and access the HR Service Portal. • View, create, and edit HR cases in **HR Case Management**. • Access and create HR tasks inside an HR case using the **Add Task** related link.

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Roles (continued)

Role	Description
	• View, create, and edit HR profiles including sensitive information like salary. • Create HR profiles and generate for multiple users through custom criteria. • Associate any user to HR roles, groups, and skills. • View and access **HR Administration**. • View and access **HR Dashboards & Reports**. • Run **Application View** to manage: HR objects like HR roles and profiles. **Note:** When the Human Resources Scoped App: Core (com.sn_hr_core) and Lifecycle Events (com.sn_hr_lifecycle_events) plugins are active, the Lifecycle Admin (sn_hr_le.admin) role is part of HR Admin (sn_hr_core.admin).
Delegated Developer [delegated_developer]	When added to the HR Administrator role, can: • Access, and manage HR objects like HR profile, cases, groups, roles, service catalog objects, and Service Portal. • Modify HR application-related objects like skills, Knowledge Base, chat, notifications, surveys, reports, integrations, and SC. • Modify application structures like tables, business rules, and client-side validation,
User with HR role	There are specific HR roles that allow users access to specific areas of the system. For example, the HR profile reviewer [sn_hr_core.profile_reader] role can read profiles, but not edit them.

After system configuration, to help prevent the System Administrator from accessing sensitive information:

- Remove the HR Administrator [sn_hr_core.admin] role from System Administrator [admin].
  - The base system requires a user with the System Administrator role to run scheduled jobs. For details on HR scheduled jobs, see Components installed with Case and Knowledge Management.
  - To ensure the scheduled jobs run, change the user in the **Run as** field for each scheduled job to a user that has the HR admin role.

    Note: Changing the user allows the scheduled jobs to run, but only a user with the System Admin role can view and run a scheduled job on demand.

  - Change the scope of the application to Human Resources: Core application. For information on changing the scope, see Contextual development edit messages.
  - Reveal the **Run as** field. For information on revealing hidden fields on a form, see Configuring the form layout.
- Log out and log back in to ensure that the changes take effect.

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Note: Ensure that you have completed setup before removing the HR Administrator role.

Minimum number of scoped admins required

System properties determine the minimum number (default is two) of scoped admins that must be active for an application.

To list the properties, enter `sys_properties.list` in the filter navigator and search for the property to configure.

The list of system properties and what scoped admin can access:

System properties

Properties

Property Name	Scoped Admin
sn_hr_core.min_admin_count	HR admin [sn_hr_core.admin]
sn_hr_ef.min_admin_count	Employee Document Management admin [sn_hr_ef.admin]
sn_hr_integrations.min_admin_count	HR Integration Admin [sn_hr_integrations.admin]
sn_hr_le.min_admin_count	HR Lifecycle Event Admin [sn_hr_le.admin]
sn_hr_le_pa.admin_count	HR Lifecycle Event Performance Analytics Admin [sn_hr_le_pa.admin]
sn_hr_pa.min_admin_count	HR Performance Analytics Admin [sn_hr_pa.admin]
sn_hr_pj.min_admin_count	HR Parental Journey Admin [sn_hr_le_pj.admin]
sn_hr_sp.min_admin_count	HR Service Portal Admin [sn_hr_sp.admin]
sn_hr_va.min_admin_count	HR Virtual Agent Admin [sn_hr_va.admin]
sn_templated_snip.min_admin_count	Response Template Admin [sn_templated_snip.admin]
sn_hr_ws.min_admin_count	HR Agent Workspace Admin [sn_hr_ws.admin]

Remove HR Administrator role from IT System Administrators

After system configuration, remove the HR Administrator role (sn_hr_core.admin) from IT System Administrator role (admin) to help prevent IT System Administrators from viewing sensitive HR information via forms, lists and UI.

Before you begin

Role required: admin with sn_hr_core.admin

Make sure that you have at least two users with the HR Administrator role. If you assign only one person with the role and that person is deactivated, you will not have a user to perform the HR admin duties.

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Procedure

1. Log in as admin.
2. From **User Administration**, go to **Roles** (left navigation menu).
3. Click **admin**.
4. From the **Contains Roles** tab, click **Edit**.
5. From the **Contains Roles List** column, highlight and move **sn_hr_core.admin** to the **Collection** column.

   Note: Also, remove other scoped HR Admin roles, such as sn_hr_le.admin.

6. Click **Save**.
7. Log out.

What to do next

After removing the HR administrator role from IT System Administrator role, log out and log back for the changes to take effect.

Note: Ensure that you have completed the setup before you Remove HR Administrator role from IT System Administrators.

All the default HR scheduled jobs will run as usual even after the HR Administrator role is removed from the IT System Administrator role.

Note: System user inherits the IT System Administrator role (admin). When you remove HR administrator role from the IT System Administrator role, System user will no longer have the HR administrator role. Validate all your customizations that are running in the context of System user.

Add Delegated Developer to HR Administrator

For an HR Administrator [sn_hr_core.admin] to perform some platform duties, the delegated developer role must be added.

Before you begin

Role required: admin with sn_hr_core.admin

HR Administrator with Delegated Developer role

The HR Administrator role with the delegated developer role can:

- Add and update script includes.
- Add and update ACLs.
- Configure forms.
- Configure related lists.
- Configure and create COEs. For more information, see HR Centers of Excellence data model.

  Note: The Lifecycle Event Administrator (sn_hr_le.admin) role with the Delegated Developer (delegated_developer) role can also configure and create new COEs.

To add the delegated developer role to a user:

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Procedure

1. Log in as admin.
2. From the Filter navigator, enter **sys_store_app.list**.
   The **Store Application** list appears.
3. Click **Human Resources: Core**.
4. Under **Related Links**, click **Manage Developers**.
5. Ensure **Developers** is highlighted.
6. Enter the name of HR Administrator.
7. Click all items (green bar moves to the left) to grant permission.
8. Click **Save**.
9. Log out and log back in to ensure that the changes take effect.

Manage HR Groups

HR Groups are a set of users with common job skills.

Before you begin

Role required: sn_hr_core.admin, user_admin
You can have multiple levels of groups. For example, HR is a group that contains all HR employees within your company. You can have subgroups under HR such as HR Benefits, Employee Relations, and more.

Procedure

1. Navigate to **All** > **HR Administration** > **Manage Roles** > **Manage HR Groups**.
2. From the **Groups** list, click **New** or select an existing HR group.
   The **Group** form appears.

HR Groups form

Field	Description
Name	Enter a name that describes the group.
Manager	Click the **Lookup using list** icon and select the person responsible for this group.
Type	Use to define a category a group belongs to. A group can be associated with one group type (narrow scope) or multiple group types (expanded scope). This allows you to ensure qualified agents are assigned to complex cases or you have adequate coverage for less complex cases. Click the **Unlock Type** icon. Then click the **Lookup using list** icon and add **human_resources**.
Group email	Enter the email address of the group. This email acts as a group notification that sends an email to every member of the group.
Parent	Click the **Lookup using list** icon and select the HR group that is above the current group.

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Field	Description
Vendors	Vendors that the group is responsible for.
Description	A description of the group.

3. Click **Save** and a series of tabs appear at the bottom of the form.

HR groups form tabs

Field	Description
Roles	Click **Edit** and from the **Edit Members** form, move the roles from the **Collection** column to the **Roles List** column. Adding a role to a group means that all group members also have that role. **Note:** Roles associated with the parent group are automatically assigned.
Group Members	Click **Edit** to add users to the group. Click **New** to create a user and add it to the group.
Groups	Click **New** to create a new group. **Note:** Creating a group from here does not automatically create a child group under the group you have displayed.
Skills	Click **New** to create a new skill. Click **Edit** and the **Edit Members** form appears. Move skills from the **Collection** column to the **Skills List**. Click **Save** when done. **Note:** Skills associated with the parent group are automatically assigned.
Activities	This field only appears for the Lifecycle Events application. The HR Service Activities the group manages. The HR Service Activities are part of the Activity Set and together make up a Lifecycle Event. Only members of this group can update this HR Service Activity. Refer to Configure a lifecycle event activity.

4. Click **Submit** or **Update**.

HR skills management

Your organization can define HR skills to establish the qualifications of HR staff. Skills can be included in the auto-assignment process used to assign HR agents to HR cases and tasks.

Some HR skills are predefined, and you can create as many other skills as you need. You can assign skills to users or groups. When you assign a skill to a group, the skill is assigned to every group member.

Skills are also a way to ensure that HR cases are assigned to the correct group or individual.

When an HR case is opened:

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- Matching rules are used to determine case assignment by matching criteria. Refer to Matching rules for case assignment .
- An HR template is applied based on the HR Service selected.
- An HR template assigns the skill required for the case or task.
- The skill determines which group or individual is assigned to the case.

Note: If an HR case is created without skills, it will be assigned to a user without skills.

Assign an HR skill to a group

When you assign skills to HR groups, all members of the group inherit the skills and any child skills.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Manage Roles** > **Manage HR Groups**.
   This list is the same that appears under **User Administration** > **Groups**.
2. Select the HR group that you want to assign skills to.
3. In the **Skills** tab, click **Edit**.
4. Double-click skills in the **Collection** list to move them to the **Skills List**.
5. Click **Save**.
   Messages are displayed to notify you of the skills that were assigned to each group member.

Messages displayed for group skill assignment



Add or modify an HR skill

You can create HR skills and assign them to HR staff to assist with the auto-assignment of HR cases and tasks.

Before you begin

Role required: sn_hr_core.admin

About this task

The following procedure describes how to create and edit HR skills from the Skills application. Although you can create and edit skills in the **Manage HR Skills** module, you must use the Skills application to assign child skills.

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Procedure

1. Navigate to **All** > **HR Administration** > **Manage Roles** > **Manage HR Skills**.
2. Click **New Skill** or open an existing skill.
3. Enter or edit the name of the **Skill** and **Description**.
4. Click **Submit** to save your changes.
5. To assign users to the skill, complete the following steps.
   a. Locate and click the skill in the **All Skills** column.
   b. Click **Assign/Remove Users** at the top, right.
   c. Click the users you want assigned to this skill.
   d. Click **Save**.
   If you add users to a skill with child skills, the child skills are assigned to the user. Messages are displayed to notify you of the skills that were assigned.

Assign an HR skill to a user

You can assign skills to HR users to facilitate the auto-assignment of HR cases and tasks.

Before you begin

For more information about HR skills and the auto-assignment process, see HR skills management.

Role required: sn_hr_core.manager

About this task

The following procedure describes how to assign HR skills in the Manage HR Skills module. If you want to define a parent and child hierarchy for HR skills, you must use the Skills application.

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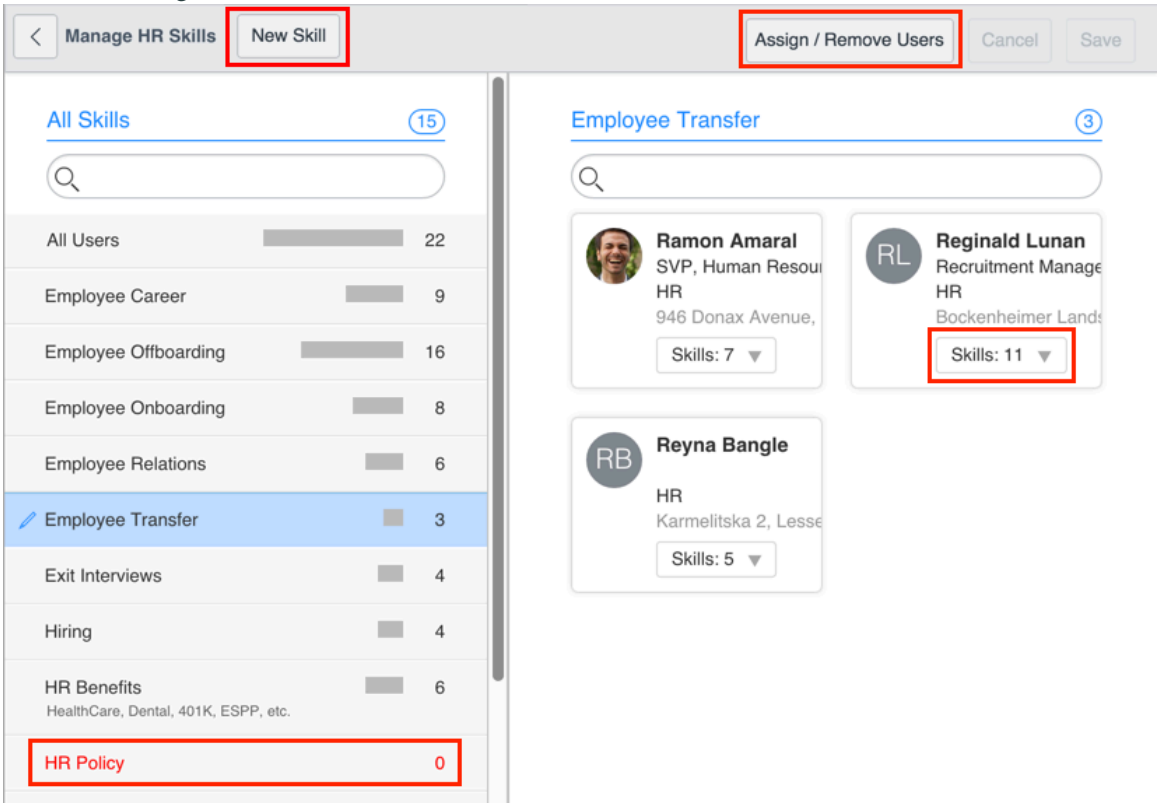
Procedure

1. Navigate to **All** > **HR Administration** > **Manage Roles** > **Manage HR Skills**.

HR skills assignment



Skills appear on the left. Select a skill to see the assigned users on the right. The user cards indicate how many skills each employee is assigned. If no skills are assigned to a user, the number on the user card is red. Skills with no assigned users are red in the skills list.

2. Select a skill in the **All Skills** list to assign to users.
3. Click **Assign/remove users**.
   The list of all users in the HR department appears on the right. Users assigned to the skill are highlighted in blue.
4. To search for an HR user, type any information, such as name, location, or title, in the search box above the list of users.
   As you type, the list narrows to display user cards that contain those letters in any field.
5. Perform any of the following actions.

Action	Description
Assign a user	Click the user card. It is then highlighted in blue.
Unassign a user	Click the highlighted user card. Its highlight is removed.

6. Click **Save**.
7. To assign other skills to a user, complete the following steps.

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a. Select **All Users** in the list on the left and locate the user on the right.

b. Click the arrow next to **Skills: #** in the user card.

c. Select the skills for the user, and click **Save**.

8. To configure skills, perform any of the following actions.

Action	Description
Add a skill	Click **New Skill**, enter the skill name and de scription, and click **Submit**.
Edit a skill	Click the pencil icon beside the skill name in the **HR Skills** list. Change the information and click **Submit**.

Configure escalation rules for HR cases

Create escalation rules to automatically route HR cases from one tier to another based on agent skills and workload.

Before you begin

Verify the following before configuring escalation rules:

- HR tier groups are created with appropriate agents
- Email addresses are configured for each tier group
- Agents have the correct roles, skills, and location assignments

Role required: sn_hr_core.admin

About this task

Escalation rules define the path that HR cases follow when they need to be reassigned. Cases typically escalate from lower-skilled tiers to higher-skilled tiers based on complexity, workload, or agent availability.

The system uses roles, groups, skills, and location to determine the appropriate escalation target for each case.

Procedure

1. Navigate to **All** > **HR Administration** > **Manage Roles** > **Escalation Rules**.
2. Create a new escalation rule by selecting **New**, or modify an existing rule by opening it from the list.
3. In the **Escalate from** field, select the source tier.
   This tier contains agents with fewer skills who will escalate cases to the next tier. You can select an existing tier using the lookup icon or create a new tier by selecting **New**.
4. In the **Escalate to** field, select the destination tier.
   This tier contains agents with more advanced skills who will receive escalated cases. You can select an existing tier using the lookup icon or create a new tier by selecting **New**.
5. Select **Submit** to save the escalation rule.
   The escalation rule is now active and will route cases between the specified tiers.

Result

You can view group information by selecting any tier in the **Escalate from** or **Escalate to** fields. The escalation rule takes effect immediately for new case assignments.

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Related topics

Manage HR Groups

Client roles

You can control what HR functionality that an employee can access using Client Roles. You can license all employees or provide HR services to users in a specific location or group.

Client roles define access within the application. For more information, see Manage HR roles.

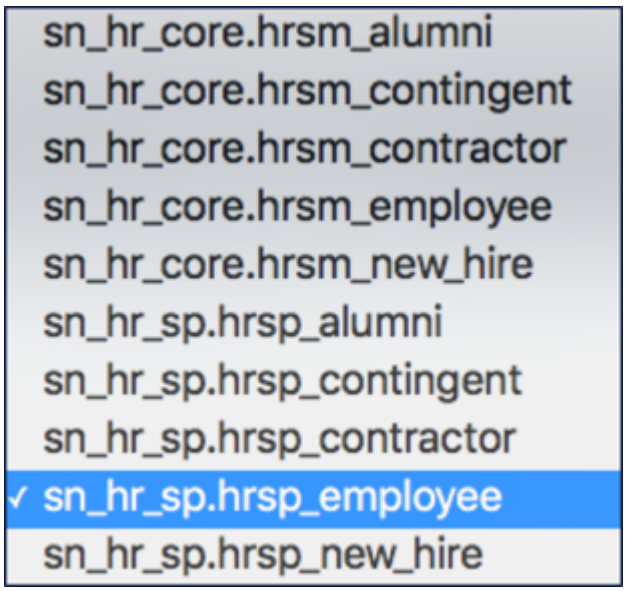
ServiceNow provides these roles and modifying them is not recommended. These roles can be added to other roles or groups. There are two groups:

- HR fulfillment support: sn_hr_core.hrsm
- HR Service Portal: sn_hr_sp.hrsp

Both roles contains conditions depending on the type of user:

- Alumni (only used when you have the Alumni Center installed). For more information, see Setting up your Alumni Center.
- Contingent
- Contractor
- Employee
- Employment Type
- Location
- New Hire
- New Hires Only
- Office Based Employees
- Remote Employees

Client Roles



Note: When creating an HR case and an employee does not display, ensure that the employee has any of the sn_hr_core.hrsm roles assigned. Also, when an employee cannot access the HR Service Portal, ensure any of the sn_hr_sp.hrsp roles are assigned.

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Client roles are defined and administered like regular roles. ServiceNow tracks them for licensing purposes.

Assignment of client role rules is defined in the **Client Role Assignment Rules** module.

Client role assignment rules

Use Client Role Assignment Rules to automatically assign or reassign a role to an employee.

Before you begin

Role required: sn_hr_core.admin
A condition or set of multiple condition clauses based on the HR profile [sn_hr_core_profile] table are used to automate assigning roles.

Note: Client role assignment rules are for access to the Employee Center only.

For example:

- A newly hired employee can be automatically assigned the new hire [sn_hr_core.hrsm_new_hire] role. This role provides limited access to the Employee Center or service portal.
- The Update Client Roles scheduled job runs and acknowledges the employee start date for the new hire has not been reached.
- The Assign HR Roles business rule assigns the new hire role based on the conditions set on the client role assignment rules.

To map conditions to a client role:

Procedure

1. Navigate to **All** > **HR Administration** > **Manage Roles** > **Client Role Assignment Rules**.
2. Click **New** to create a client role rule or click an existing client role rule to edit.
3. **Active** is enabled by default.
4. From **Condition**, click the **Lookup using list** and select an existing HR condition.
5. Click **New** to create an HR condition.
   You can also click the **Preview this record** icon to open the record.

Field	Description
Name	Name of the HR condition.
Table	Table conditions are built on the HR profile [sn_hr_core_profile] table only. Changing the table for client role assignment is not recommended.
Active	Check box for enabling condition. **Note:** Deactivate at the client role as signment level and not the conditions level.
User column	Together with the HR profile [sn_hr_core_pro file] table, filters users when evaluating a con dition.

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Field	Description
Condition	Conditions the Assign HR Roles business rule uses to automatically assign a role to an em ployee. For example, the base system auto matically assigns the New Hire role to a user when Employment type is: ○ Full Time Employee or ○ Part Time Employee or ○ Temporary Employee and ○ Employment start date is after Today **Note:** When defining conditions like case sensitivity or null values, see API

6. Click **Submit** or **Update**.
7. From **Role**, click and select the HR role you want to automatically assign when the conditions are met.
8. Click **Submit** or **Update** to save your changes.

HR Service Delivery case assignment

HR cases can be automatically assigned to your agents via an HR case template, assignment and matching rules, or advanced work assignment (AWA).

Assignment and matching rules and AWA use the platform Skill Management application to define skills.

- Assignment and matching rules associate skills using HR case templates.
- AWA uses skill determination rules.

Advanced Work Assignment (AWA) for HR Service Delivery

Use the ServiceNow Advanced Work Assignment for HR Service Delivery feature to automatically assign HR cases to agents based on availability, capacity, and skills.

AWA for HR Service Delivery pushes cases and tasks to qualified agents using work item queues, routing conditions, and assignment criteria that you define.

For more information, see Agent Workspace Advanced Work Assignment (AWA).

AWA is also available for HR Service Delivery Agent Workspace. For more information, see .

Assignment and matching rules in HR

The base system uses the automatic case assignment feature to assign an HR case to an agent. It attempts to assign an agent with the least number of cases assigned, has the skills required by the case, and matches the location of the subject person.

Auto Assign business rule

HR Case has a business rule called Auto Assign that invokes matching rule logic.

When auto assignment is triggered, the matching rules logic obtains a list of agents. The number of agents returned is based on a parameter that specifies the length of the list. The default is one.

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Note: For specific HR services, the auto-assignment functionality can be skipped. See Case options in Configure an HR service.

Matching Rules

HR assignment rules use the Resource Matching Engine [com.snc.matching_rule] plugin that is activated with the Human Resources Scoped App: Core [com.sn_hr_core] plugin. You can specify a table and a condition. By default, the base system sets an assignment group for each table and leaves the Assigned to field empty.

For HR cases that meet these conditions, the hr_AssignmentAPI script include is called to return a list of agents that are eligible for assignment. See Add or modify a matching rule.

Note: The base system provides matching rules for every COE table and HR task table.

Each HR table and task in the base system have two matching rules:

- Agents by skills and country
- Agents by skills

The higher priority (lower execution order) rule for each pair is the match by skills and country.

- If this matching rule does not find eligible agents, then the condition of the lower priority rule is still true and attempts to match by skills alone.
- If the higher priority rule finds an agent, the assigned to field is no longer empty and the secondary rule does not match.
- Either the getAgentsByCountryAndSkillsOrderLeastLoaded or getAgentsBySkillOrderLeastLoaded in the hr_AssignmentAPI script include are called.

Assignment script includes

The hr_AssignmentAPI passes the call through to the hr_AssignmentUtil script include to reduce upgrade issues. Rather than update hr_AssignmentUtil, you can add to hr_AssignmentAPI or another customer script include.

The getAgentsByCountryAndSkillsOrderLeastLoaded or getAgentsBySkillOrderLeastLoaded in the hr_AssignmentAPI script include looks for the least ordered by country and skills.

- These scripts also look at the agents in the assignment group.
- They then look for agents that have the required skills for the case and are in the same country as the subject person.
- The list of agents that are returned are sorted according to case assignment load defined as active cases of type HR case (or extension) or active HR tasks.

Auto assignment for HR tasks is slightly different than HR cases.

- The list of possible agents for an HR task is generated like an HR case.
- But, after ordering the list, the task is checked for a parent HR case and if the agent assigned is on the list.
- If it is, the agent is placed at the top of the list ignoring case load.

Required skills

If you have more than one HR department, you can remove the HR group assignment from the HR template and use assignment rules to assign the HR group. For example, if you have HR departments in both the U.S. and German offices, you can create an HR group for each office.

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You set up assignment rules to assign the HR group based on the location of the employee who submitted the HR case.

If your organization is using HR skills to qualify HR case assignments, ensure that the assigned user or group members have the required skills. To determine whether skills are being used and assigned, check the following configuration options.

- **HR Administration** > **HR Services** > **HR Templates**: Look at the template that corresponds to the assignment rule to see what skills, if any, are required.
- **HR Administration** > **Manage Roles** > **Manage HR Skills**: Find the HR user assigned to the case and click the **Skills: #** button to see whether the required skill is assigned. If not, check the box to assign it, and click **Save**.

Refer to Create rules to route and assign customer service cases for more information on matching and assignment rules.

Add or modify an HR assignment rule

Assignment rules are used to assign the HR group when it is not assigned from the catalog item template. You can create HR assignment rules as needed.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Assignment Rules** > **HR Assignment Rules**.
2. Click **New**.
3. Complete the form.

Assignment Rules form

Field	Description
Name	Descriptive name for the HR assignment rule.
Execution Order	Order in which the rule processes. Rules with lower-order numbers process first. For example: ○ The first HR assignment rule has an execution order of 100. ○ A second HR assignment rule has an execution order of 200. ○ If a group has members that fit the conditions defined in the first HR assignment rule, it assigns an agent with the least amount of assigned cases. ○ If the first HR assignment rule cannot find an agent to assign, the second HR assignment rule runs.
Application	Indicates core application scope the assignment rule applies to.
Active	Check box that specifies the rule is in use.
Applies To	
Table	Table with the records that the assignment rule applies to. Default is the HR Task [hr_task] table.
Conditions	Conditions in which the assignment rule applies.

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Field	Description
	Note: When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Assign To	
User	User to assign to the case when this rule is applied.
Group	Group to assign to the case when this rule is applied.
Script	
Script	Script to define advanced assignment rule functionality. Current.variable_pool set of variables is available. **Note:** Two example scripts are provided as a comment. You can modify either script or use the information as a starting point for your own script. Remove the examples when you are finished.

4. Click **Update**.

What to do next
After creating the assignment rule, you can test it to verify that it works.

Related topics
HR Administration

Test an assignment rule
You can test a new assignment rule to verify that it works as intended.

Before you begin
Role required: sn_hr_core.admin

Procedure
1. Create a new HR case.
2. Fill in the fields with data that matches the assignment rule conditions.
3. Submit the HR case.
4. Reopen the case and check that the correct assignment information was added.

What to do next
If the correct assignment information was not added, check to see whether you are using HR skills and if the user has the required skills.

Note: Assignment groups are assigned at the time an HR case is created from the HR case form. Once the State is changed to Ready, an agent is assigned. When an HR case is created from the Employee Service Center, an HR agent is assigned immediately.

- **HR Administration** > **HR Services** > **HR Templates**: Look at the template that corresponds to the assignment rule to see what skills, if any, are required.
- **HR Administration** > **Manage Roles** > **Manage HR Skills**: Find the HR user assigned to the case and click the **Skills: #** button to see whether the required skill is assigned. If not, check the box to assign it, and click **Save**.

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After verifying that the necessary skills are assigned to the correct users, test the assignment rule again.

Related topics

HR Administration

Add or modify a matching rule

You can add or modify a matching rule to assign HR cases to specific users or groups.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Assignment Rules** > **HR Matching Rules**.
2. Complete or edit the form.

Matching Rules form

Field	Description
Name	Descriptive name for the HR matching rule.
Execution Order	Order in which the rule processes. Rules with lower-order numbers are processed first. If a rule is applied, the rules with a higher-order number are not processed. For example, a matching rule with order 100 states to assign the case to an agent with the specified skill. Matching rule with order 200 states to assign the case to the group **HR**. If a group has the specified skill, then it is assigned. If not, then the second rule runs and assigns it to **HR**.
Active	Check box that specifies the rule is in use.
Applies To	
Table	Table with the records that the matching rule applies to. Default is the HR Task [hr_task] table.
Conditions	Conditions in which the matching rule applies. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Resource	
Matching	Indicates the option to match the rules. Default is Scripted.
Script	Script to define advanced matching rule functionality. Current.variable_pool set of variables is available. **Note:** Two example scripts are provided as a comment. You can modify either script or use the information as a starting point for your own script. Remove the examples when you are finished.

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3. Submit the HR case.
4. Reopen the case and check that the correct matching information was added.

Labor unions

Use Labor Unions to define the details about unions within your company.

You can use labor union data to track employee union membership so you can configure HR conditions and criteria to target content and workflows for these employees.

Defining a union includes:

- Defining local chapters
- Identifying union contacts
- Setting up employee union members so you can track and automate workflows and target content relevant to union representation

Setting up labor unions

Set up HR Service Delivery labor unions to define information about the labor unions you support. You can associate an employee membership to a specific union and union chapter.

To create a union structure, you must set up a Union first.

After setting up a Union, you can set up:

- Local chapters
- Employee membership
- Union contacts

Tables

The following tables are included:

- Labor Union [sn_hr_core_labor_union]
- Local Union Chapter [sn_hr_core_local_union_chapter]
- Labor Union Contact [sn_hr_core_labor_union_contact]
- Employee Union Membership [sn_hr_core_employee_union_membership]

Roles

The following roles are needed for access to Labor Unions records:

Roles

HR role title [name]	Description	Contains roles
HR profile reader [sn_hr_core.profile_reader]	The HR profile reader role can access and read: • Unions • Union Contacts • Employee Union Membership	N/A

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Roles (continued)

HR role title [name]	Description	Contains roles
HR profile writer [sn_hr_core.profile_reader]	The HR profile writer role can access and read: • Unions • Union Contacts • Employee Union Membership The HR profile writer role can also create and edit employee union memberships.	HR profile reader [sn_hr_core.profile_reader]
HR admin [sn_hr_core.admin]	The HR admin role can access, read, create, and edit: • Unions • Local Chapters • Union Contacts • Employee Union Membership	• HR profile reader [sn_hr_core.profile_reader] • HR profile writer [sn_hr_core.profile_reader]

HR profile writer [sn_hr_core.profile_reader]:

The HR profile writer role contains the HR profile reader role. It can access and read Unions, Union Contacts, and Employee Union Membership. It can also edit Employee Union Membership.

Create a labor union

Create a union with details that identify it.

Before you begin

Role required: admin

Note: You must create a union before you can create local chapters and union contacts.

Procedure

1. Navigate to **All** > **HR Administration** > **Labor Unions** > **Unions**.
2. Fill in the form.

Unions Administration form fields

Field	Description
Union name	The name that identifies the union.
Industry	The industry the union represents.

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Field	Description
Active	Indicates that the union record is active and available for use.
Union description	Text that describes the union.
Union URL	The website URL of the union.

3. Select **Submit** or **Save**.
   If you select **Save**, the **Local Union Chapters** and **Labor Union Contacts** tabs appear.

   Note: For more information on **Local Union Chapters**, see Create a local chapter. For more information on **Labor Union Contacts**, see Create union contacts.

Create a local chapter

Use Local Chapters to set up and track the chapters of your union. Local chapters are children to labor unions.

Before you begin

Role required: admin

Procedure

1. **HR Administration** > **Labor Unions** > **Local Chapters**,
2. Select **New**.
3. Fill in the form.

Local chapters form fields

Field	Description
Name	The name of the local union chapter.
Labor union	The name of the labor union that the local chapter belongs to. **Note:** For more information, see Create a labor union.
Active	Indicates that the union local chapter record is active and available for use.
Union chapter description	A description of the local union chapter.
Local chapter URL	The website URL of the local union chapter.

4. Select **Save** or **Submit**.
   If you select **Save**, the **Labor Union Contacts** and **Employee Union Memberships** tabs appear.

   Note: For more information on **Labor Union Contacts**, see Create union contacts. For more information on **Employee Union Memberships**, see Create employee union memberships.

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Create union contacts

Use Union Contacts to create and track the people who work for a union or local chapter organization.

Before you begin

Role required: admin

Note: Creating a union contact does not create a user record.

Procedure

1. Navigate to **All** > **HR Administration** > **Labor Unions** > **Union Contacts**.
2. Select **New**.
3. Fill in the form.

Union contacts form fields

Field	Description
Contact name	Name of the union contact.
Phone number	Phone number of union contact.
Email	Email address of union contact.
Labor union	The labor union that the contact person is associated with. **Note:** For more information, see Create a labor union.
Local union chapter	The chapter of the labor union the contact person is associated with. **Note:** For more information, see Create a local chapter.
Labor union role	The contact person's role within the labor union.

4. Select **Save** or **Submit**.

Using Labor Unions

After a labor union has been set up, you can associate employees with a labor union.

Note: Associating a labor union with an employee is a reference to the membership and not proof of actual membership.

There are a couple of methods to associate a labor union with an employee:

- From the employee's HR profile

Note: For more information, see Add or modify an HR profile.

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- From the Employee Union Membership form

Note: For more information, see Create employee union memberships.

Create employee union memberships

Use Employee Union Membership to input and track your union employees. Creating union memberships allows you to gain visibility into employee membership through an HR profile and target content or tasks through HR criteria.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Administration** > **Labor Unions** > **Employee Union Membership**.
2. Select **New**.
3. Fill in the form.

Employee union membership form fields

Field	Description
Employee	The employee and member of a union. Selecting the Lookup using icon ( ) displays all employees with an HR profile. **Note:** There is an **Employee Union Membership** tab on an HR profile for employees that are part of an employee union membership. For more information, see Add or modify employee union membership.
Labor union	The labor union the employee is a member of. **Note:** For more information, see Create a labor union.
Local union chapter	The local union chapter the employee is a member of. **Note:** For more information, see Create a local chapter.
Effective start date	The date the employee became a union member.
Effective end date	The date the employee left the union, if applicable.
Active	Identifies if the employee is an active union member.
Union steward	Identifies if the employee is a union steward.

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Field	Description
Union job code	The employee's job code within your company.

4. Select **Save** or **Submit**.

Configure an HR badge

Use **Badges** to create or modify existing identification badges used to quickly identify the organization of the **Assigned to** person for the **Activity** on the **HR Ticket** page.

Before you begin

Role required: sn_hr_core.admin

About this task

Custom badges only appear for specific types of HR activities.

- The base system provides defaults and is configurable.
- On the **HR Ticket** page, you can filter to-dos based on badges.
- Defaults are added to HR services.
- Can be overridden on an Activity.

Procedure

1. Navigate to **All** > **HR Administration** > **Badges**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Badge form

Field	Description
Name	Name of the HR badge. Provide up to three characters to represent an organization, such as HR for Human Resources or IT for Information Technology.
Badge description	Description of the HR badge.

4. Click **Submit** or **Update**.

Response templates for HR Service Delivery

You can use response templates with HR Service Delivery to resolve cases faster and more efficiently.

Response templates (formerly known as templated snippets) are reusable messages. You can copy these messages created from these templates to an HR case, task, email, or chat to provide quick and consistent messages to employees. For example, a response template for a payroll discrepancy case enables HR agents to use a standardized message when responding to that case type.

Note: For more information on response templates, see Response templates.

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Response template channels

Response templates can correspond to multiple channels. A channel represents the media you want the response template to be available for. For example:

- Chat channel: Provides response templates for chat conversations.
- Email channel: Provides response templates for emails.
- Form: Provides response templates for HR case or tasks.

If you create a new response template and do not assign it to a channel, it is not available to use.

To create a universal response template that is available for all channels, assign it to all channels.

Note: Any response templates created prior to the Quebec release are associated with all channels preserving their prior behavior and can be used universally.

Activation information

The response templates feature automatically activates when Case and Knowledge Management activates. See Activate response templates.

To use response templates in a chat in Agent Workspace for HR Service Delivery, activate: Advanced Work Assignment for HRSD (com.sn_hr_awa) plugin.

For more information, see and Setting up Workspace Agent Chat.

For more information on setting up chat in Virtual Agent, see Virtual Agent.

How to use response templates with form (HR case or task)

HR administrators and managers can create response templates. Each template is associated with an HR table that is an extension of the Task [task] table. Configure the template to include variables pulled from that table. Also, use a condition builder to specify what a case must meet for the template to be available, such as for a specific HR service.

For more information on creating or modifying a response template, see Create or modify an HR Service Delivery response template.

Response templates appear for an HR case form for templates associated with the Form channel and satisfy the conditions on the response template. For the HR case form, the **Responses** button appears at the top. If there are multiple templates available, you can select the appropriate one. See Work an HR case.

Note: For more information on using a response template with an HR case, see Copy a response template to an HR case.

For Agent Workspace for HR Service Delivery, the Response Templates icon ( ) appears in the Contextual sidebar. For more information, see .

Components installed with response templates

Several types of components are installed with activation of the Templated Responses (com.sn_templated_snip) plugin, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Demo data is available for this feature.

Roles installed

By default, the following HR roles contain the following response template roles.

Note: The Templated Responses [com.sn_templated_snip] plugin activates the sn_templated_snip.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Response Template admin user by requiring a minimum number (default is two) of active users with this role.

Roles installed with response templates

Role title [name]	Description	Contains roles
Response templates administrator [sn_templated_snip.template_snippet_admin]	Grants access to scoped administration of the response templates feature.	sn_templated_snip.template_snippet_writer
Response templates writer [sn_templated_snip.template_snippet_writer]	Grants access to create, read, update, and delete (CRUD) response template content.	sn_templated_snip.template_snippet_reader
Response templates reader [sn_templated_snip.template_snippet_reader]	Grants access to read response template content.	None

You can assign these roles to the appropriate roles, groups, or users in your application.

- To assign a role to another role, see Add a role to an existing role.
- To assign a role to a group, see Assign a role to a group.
- To assign a role to a user, see Assign a role to a user.

For further information on user administration and how to manage users, see User administration.

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Tables installed

Tables installed with response templates

Table	Description
Response Template [sn_templated_snip_note_template]	Stores response template information. Response templates are reusable messages that can be copied to case or task forms. Response templates provide quick and consistent messages to users, or display standard chat response messages to requesters in Agent Chat.
M2M Response Template to Channel [m2m_response_template_to_channel]	Maps channels to response templates.
Response Template Channel [sn_templated_snip_channel]	Stores information about response template channels.
Note Template for Table [sn_m2m_note_template_for_table]	Maps notes to response templates.

For further information on table administration and how to manage data, see Table administration.

Create or modify an HR Service Delivery response template

Create or modify a response template (formerly known as a templated snippet) to define a reusable message. You can copy these messages when responding to employees to provide quick and consistent messages.

Before you begin

Role required: sn_hr_core.manager, sn_templated_snip.template_snippet_admin

Each template is associated with an HR table that is an extension of the Task [task] table. The template can be configured to include variables pulled from that table. For example, if you choose the HR Case (sn_hr_core_case) table, you can select the Subject person variable to appear in the Template body and it will replace the variable with the actual name of the subject person when the response template is used.

Also, use condition builder to define when a case meets the criteria for a template, such as for a specific HR service.

Procedure

1. Navigate to **HR Administration** > **Response template configuration**.
2. Select **New** to create a response template.
   Or, select an existing response template to modify from the list.
3. Fill in the fields on the form.

Response template form

Field	Description
Name	Name of the response template.

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Field	Description
Short Name	Short description that identifies the response template when using chat in Agent Workspace. Use the short name with a quick command (/) to show the text from the template body of the response template while in chat. This feature provides a fast and consistent way to populate text while in chat. For example, the short name `gm` identifies the chat response template for a Good Morning greeting. Enter **/gm** in a chat window to show the text from this response template.
Table	Name of the table that the response template is associated with. If you are creating a response template for Agent Workspace chat, the associated table is the Interaction [interaction] table. For other response templates, the table must be an extension of the Task [task] table. **Note:** Creating custom COE tables do not allow you to add the Copy to Clipboard UI action. Users can still use the copy and paste function.
Condition	Conditions that determine when the response template is available for use. When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global. **Note:** The conditions available depend on the table you select. For chat response templates, specify the condition: **[Type] [is] [Chat]**
Application	The application that created the response template.
Group visibility	Indicates what groups have access to the response template. Adding groups filters who can view the response template. **Note:** Leaving this field empty makes the response template available to all groups.

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Field	Description
Template body	Text of the response template providing instructions to the agent on how to respond to a specific case or task. You can reference field values by selecting variables from the variables list based on the table you select. You can manually enter custom variable references: ○ Current user: `${current_user}` ○ Current date: `${Date}` Or, place your mouse where you want the custom variable reference to appear and select the **Insert Current User** or **Insert Current Date** buttons. **Note:** Response templates do not support rich text.
Select variables	Variables you can add to the template body. For example, if you choose the HR Case (sn_hr_core_case) table, you can select the Subject person variable to appear in the Template body and it will replace the variable with the actual name of the subject person when the response template is used. **Note:** The variables available depend on the table you select.

Example

The following GIF shows an example of an HR manager in the HR Service Delivery application creating a response template to escalate payroll discrepancy cases. The template is associated with the HR Payroll Case [sn_hr_core_case_payroll] table, and a condition is set to filter on cases that match the Payroll Discrepancy HR service. The template text is pasted into the body, and then a variable for the subject person is added to the salutation.

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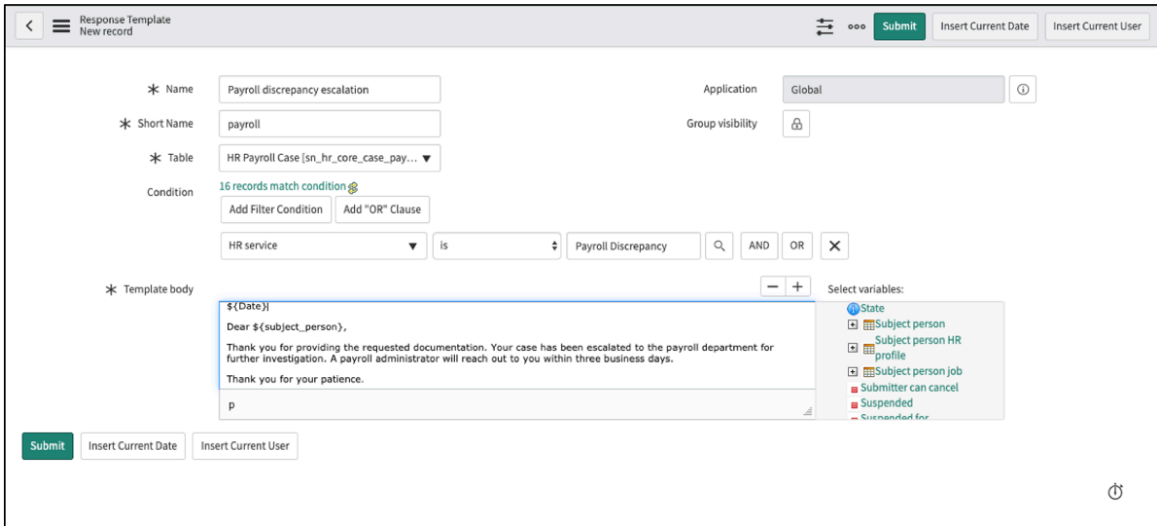

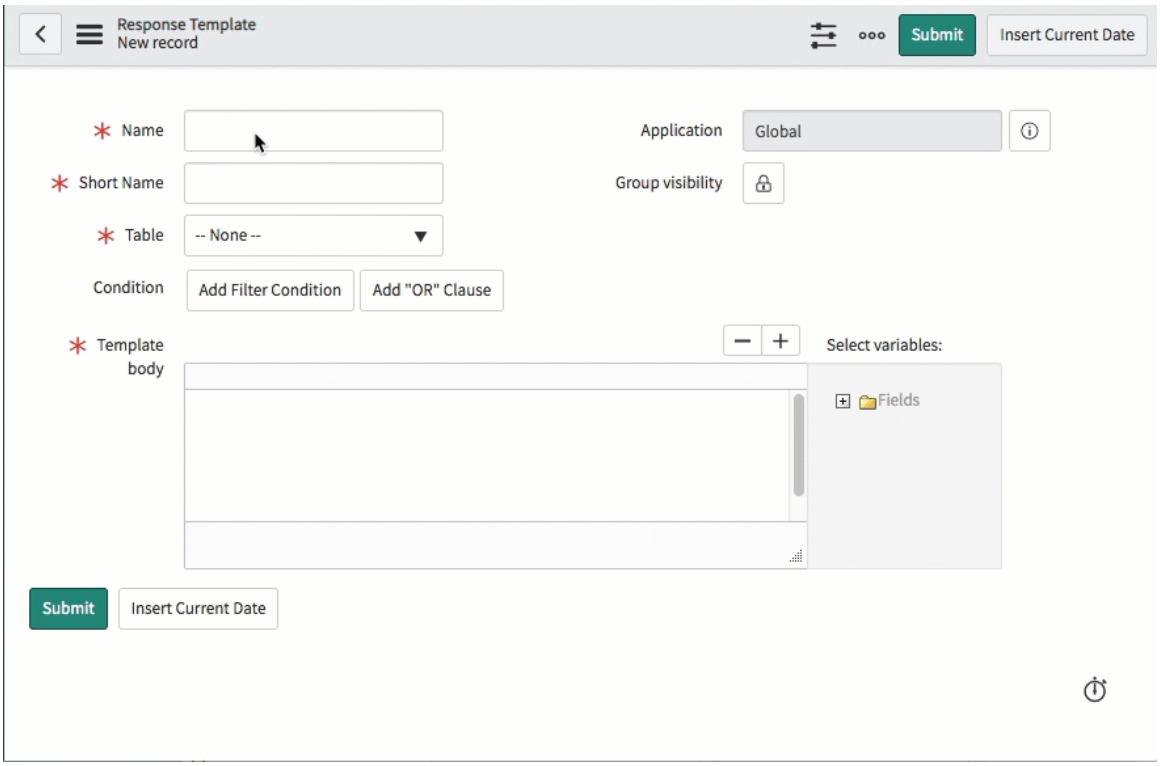

4. Click **Submit** or **Update**.
   Channels limit the response template to only the channels you add. If you leave this blank, the response template is available to no channels. This feature allows you to have different messages for chats, emails, or form. For more information, see Create a response template channel.
   The Channels related list appears.

What to do next

You can copy response template content to any field on a form that meets the specified conditions.

The following GIF shows an example of an HR case writer in the HR Service Delivery application opening a payroll discrepancy case and copying a payroll discrepancy escalation template to the comments field in the HR case form for the employee to read.

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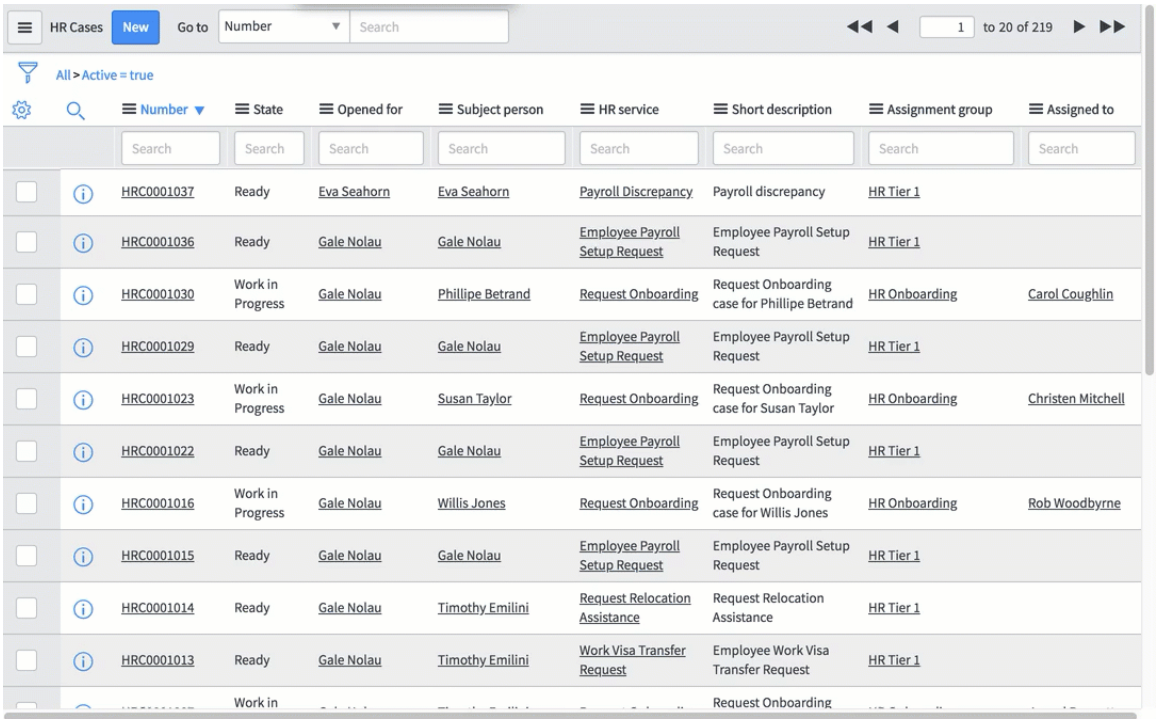

Create a response template channel

Follow these steps to create a response template channel. Response template channels ensure the correct response templates appear for use with chat, email, or HR case or task.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Administration** > **Response Template Configuration**.
2. Select an existing response template or click **New**.
3. Select **Channels**.
4. Select the **Lookup using list** icon.
5. Select **New**.
   Fill in the fields on the form.

Response Template Channel

Field	Description
Name	The name of the channel. Channels represent a category you want the response template to appear for. The base system provides: ○ Chat ○ Email ○ Form

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Field	Description
	Note: The Advanced Work Assignment for HRSD (com.sn_hr_awa) plugin must be activated to use response templates in chat.
Value	The name of the channel you want to remain consistent in relation to different languages. For example, if I am working in French, the **Name** field could be LeChat, but Chat in the **Value** field. This ensures that the correct template is selected regardless of language.
Application	The application the response template is available to use in.
Active	Activates the Response Template Channel. **Note:** Unchecking the box inactivates the record without deleting it.

6. Select **Save**.
   Channels limit the response template to only the channels you add. If you leave this blank, the response template is available to no channels. This feature allows you to have different messages for chats, emails, or form. For more information, see Create a response template channel.
   The Channels related list appears.
7. Click **New** to create a new channel or **Edit** to access an existing channel.
8. After you select the channel(s), click **Save**.
   The **Response Template** form returns.
9. Click **Update**.
   For more information on response templates, see Create or modify an HR Service Delivery response template.

Copy a response template to an HR case

Copy response template (formerly known as templated snippet) content to any field on an HR case form that meets the specified conditions.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**, and open one of the modules, such as **Assigned to me** or **Open**.
2. Open the HR case.
3. Click **Responses** to open the **Response Templates** side panel.

   Note: If the **Responses** button is not visible, make sure that a response template that meets the conditions for the open case is available to use. See Create or modify an HR Service Delivery response template for more information.

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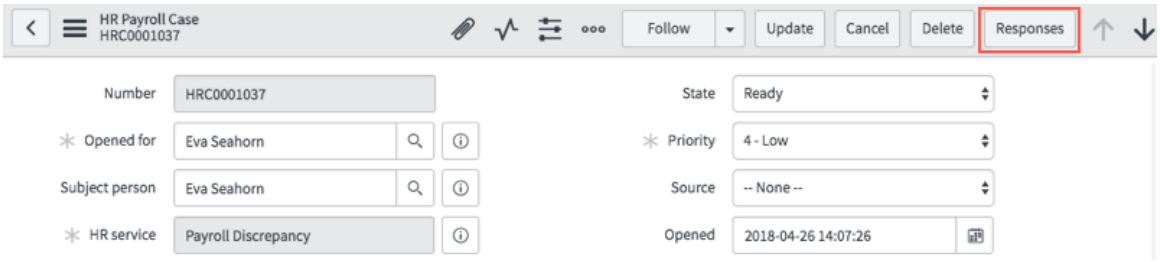
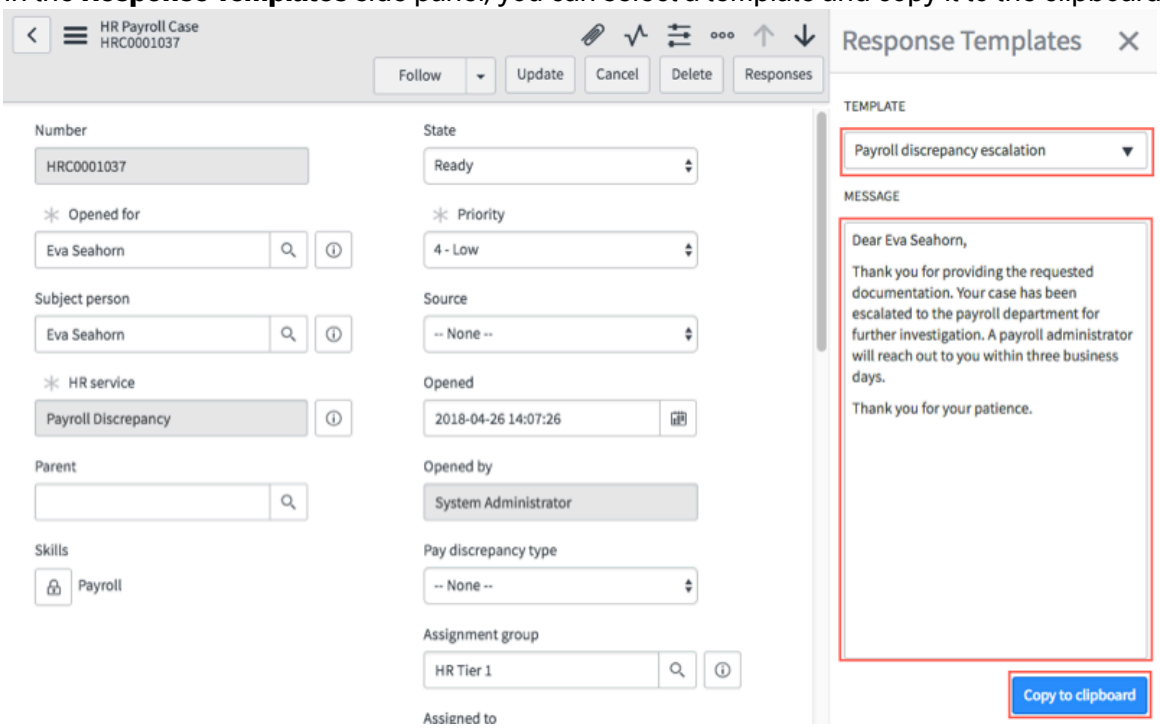


4. In the **Response Templates** side panel, you can select a template and copy it to the clipboard.



5. Once copied, you can paste the content to a field on the form, such as to **Comments**, or into an email that you send to the employee.

Note: For information on using response templates in HR Agent Workspace, see .

HR synonym dictionary

HR Service Delivery provides a Synonym Dictionary that helps expand text searches with additional keywords.

Before you begin

Role required: admin, ts_admin

About this task

You can edit the HR Synonym Dictionary to reflect your business and terminology.

Note: You must be in the Global scope to edit.

Procedure

Complete the following tasks:

Load the HR Synonym Dictionary

The HR Synonym Dictionary loads automatically when you check the **Load demo data** box and activate the Human Resources Scoped App: Core [com.sn_hr_core] plugin.

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Activate the HR Synonym Dictionary

1. Navigate to **System Properties** > **Text Search**.
2. Check **Yes** in the **Enable Synonym (which can be defined in Synonym Dictionaries)** field.
3. Click **Save**.

Edit the HR Synonym Dictionary

1. Navigate to **System Definition** > **Text Index Synonym Dictionaries**.
2. Click **HRSD Synonym Dictionary**.
3. The base system provides five default Synonym Sets.
4. Click a Synonym Set to edit.
5. Add words in the **Synset** box separated by commas. The words in this box are your custom words that you feel your employees use in search.
6. Or, click **Insert a new row** to add a Synonym Set.
7. Click **Update**.

Publish the HR Synonym Dictionary

1. The HRSD Synonym Dictionary form appears.
2. Click **Publish Dictionary** under Related Links.
3. The Synonym Dictionary is active after a few minutes.

HR security

HR Service Delivery provides Restricted Caller Access, Encryption Support, and Edge Encryption security features.

Restricted caller access for HR

Restricted caller access (RCA) defines cross-scope access to HR Service Delivery applications.

RCA is available to help secure sensitive information in HR scoped tables and script include APIs. Without RCA, tables that are not private to a scope are susceptible to queries by any server-side script.

The **Scoped Application Restricted Caller Access [com.glide.scope.access.restricted_caller]** plugin is activated during the HR application installation or upgrade.

Caller tracking

This setting is recommended for the development stage. Access is allowed to tables and script includes, but tracked in the Restricted Caller Access table. Access information can be viewed from **Application Restricted Caller Access**.

Caller restriction

This setting is recommended for the production phase after development is complete.

To define cross-scope access to an application resource, refer to Define cross-scope access to an application resource.

Related topics

Set the application scope, application resources, and event access

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Encryption for HR and Employee Document Management

HR Service Delivery and Employee Document Management provides encryption to secure sensitive information.

Encryption prevents unauthorized users from downloading and viewing employee documents or viewing specific fields. To encrypt employee documents or fields in HR, Field Encryption is activated by default and provides role-based encryption functions.

A cryptographic manager configures the fields or applications that are to be encrypted using encryption modules and module access policies:

- **Note:** Ensure the **Application** field has Employee Document Management selected.
- From the module access policy, set the role for encryption access. Specify the role to the user adding employee documents. Users with this role can access encrypted documents. See Create a module access policy.
- Employees can view their own documents when HR Service Delivery is licensed, activated, and the document type allows employee access. The role specified in the encryption module is not required for employees to view their own documents that are encrypted. Define policies for a document type To configure the field or attachment for encryption, see Encrypting fields and attachments.

Note: Documents that were previously encrypted using encryption contexts have the same access using encryption modules in Australia.

For details on Field Encryption see, Field Encryption.

Edge Encryption for HR and Employee Document Management

HR Service Delivery and Employee Document Management provides edge encryption to secure sensitive information.

Edge encryption provides you with direct control over your data security. Encryption and key management are performed on your intranet between your browser and your ServiceNow instance.

See Understanding Edge Encryption.

Because edge encryption is enabled on a proxy server on your side of the network, there is significant planning, network administration and management, and setup required.

See Planning for Edge Encryption.

To install edge encryption, see Edge Encryption installation.

To configure edge encryption, see Edge Encryption configuration.

Edge encryption for HR

You can encrypt columns (fields) or attachments associated with an HR table. See Encrypt fields using encryption configurations.

Note: There are limitations when using edge encryption. See Edge Encryption limitations.

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HR chat from lists and forms

You can chat with employees about their HR services request from any HR list or form in HR Service Delivery.

Access chat from the **Toggle Connect Sidebar** from the **Form Header** on any HR form or list. A number display on the **Toggle Connect Sidebar** icon to indicate that someone is trying to chat with you.

A chat initiated about a specific HR case is part of the case record. By default, the chat conversation saves to the **Work notes** of the HR case. Work notes on an HR case are not visible to the employee. Changing chat to **Comments** make the chat visible to the employee on the HR case.

In the chat widow, click the icon next to the HR case number to access the details of the HR case.

Note: When an agent is not assigned to an HR case, some features are not available from the Employee Center. For example, the Ask a Question link to chat about a specific case cannot assign an agent. For information on automatically assigning an HR agent to a case, see Assignment and matching rules in HR.

See Connect.

Manage the HR chat queue

You can configure the HR department chat queue and review the chat records to measure how well employees are being assisted when they initiate a conversation.

Before you begin

To use the HR chat queue, the administrator must activate the Advanced Work Assignment [com.glide.awa] and Agent Chat [com.glide.interaction.awa] plugins.

Role required: admin or hr_admin

About this task

You can configure the assignment group for monitoring the chat queue and the messages that employees see when they initiate a conversation and while they are waiting.

You can review the chat records to see how long employees waited for a response and who is accepting the chat requests.

Procedure

1. Navigate to **All** > **Collaborate** > **Connect Support** > **Support Administration** > **Queues**.
2. Select **HR Department Chat Queue** from the Chat Queues list.
3. Fill in the fields, as appropriate.

Chat Queue form

Field	Description
Name	Name of the queue.
Active	Not used in Connect.
Assignment group	User group that contains the support staff for the queue. Any user in the group can view the queue in the Connect sidebar and accept chats. No other users can access the queue. This field must be populated.

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Field	Description
Average wait time	Average time it takes for an agent to accept a chat in the queue. This value is automatically calculated. Do not manually edit.
Confirm problem	Not used in Connect.
Escalate to	Different queue to which an agent can escalate a chat. For example, there is a queue for high priority support chats. When a queue is defined in this field, agents can access the **Escalate** option in conversations.
Initial agent response	Message that users see when an agent accepts their chat. For example, **Thank you for contacting support. We are looking into your question now and will be with you shortly.**
Not available	Message that users see when they attempt to start a chat outside the defined queue **Schedule**. You can use HTML to format the message and include links or media.
Question	Initial phrase that users see when they start a new chat in the queue. For example, **How can I help you?**
Schedule	Schedule that defines when the queue is available. Leave the field blank to make the queue available all the time. Users cannot start a new conversation in the queue outside the schedule hours.

4. To review conversations associated with the queue, add the **Chat Queue Entries** related list and review the records for the following information.

Type of data	Description
How long the user waited and the result	Review information in the **State** and **Wait time** columns.
Who is actively helping employees in the queue	Review the names of agents in the **Assigned to** column.

Monitor the HR chat queue

Employees can ask a question from the **Chat with HR** link on the HR Portal. Their question is placed in the HR chat queue, and any HR agent monitoring the queue can respond to it.

Before you begin

Role required: sn_hr_core.admin

Note:

Connect Support will be deprecated. For similar capabilities, please move to Advanced Work Assignment and Agent Chat. For details, see Move from Connect Support to Advanced Work Assignment and Agent Chat.

About this task

By default, all members of the HR group monitor the HR chat queue. When a question is submitted to the queue, a pop-up notification appears.

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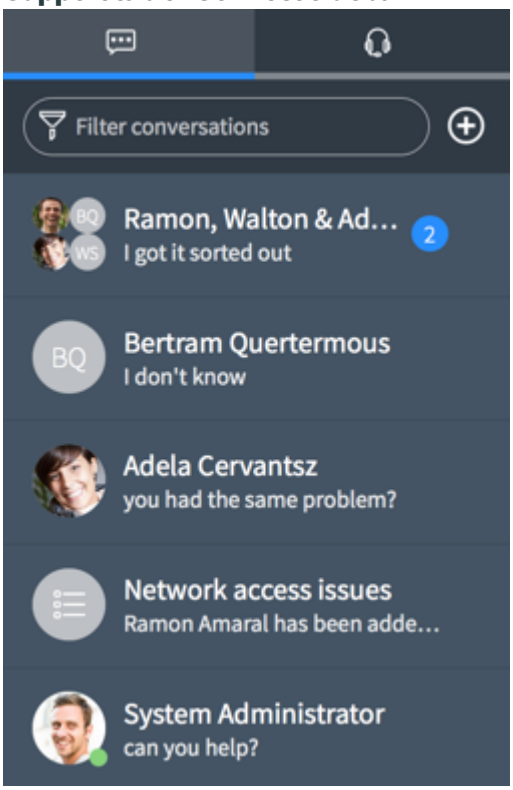
HR chat queue notification

Procedure

1. Navigate to **All** > **Collaborate** > **Connect Support**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon ( ).
   The support tab displays **Queues** to which you belong. It also displays your open support conversations under **Cases**. When a user starts a support conversation or an agent transfers a conversation to a queue, any agent who belongs to the associated queue can accept the conversation.

Support tab of Connect sidebar



3. Accept a conversation in one of the following ways.

Option	Description
Accept a conversation from a queue	Under **Queues**, click **Accept** by the queue. The conversation opens in the conversation pane and an entry appears in the **Cases** sec tion of the sidebar.
Accept a transfer request	Under **Cases**, click **Accept** by a transfer re quest.

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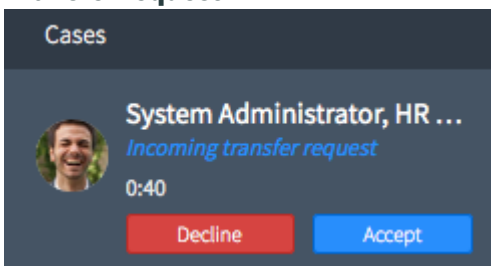
Option	Description
	Transfer request  The conversation opens in the conversation pane. The agent who transferred the conversation can stay in the conversation.

4. Respond to the user and help resolve the issue.
   By default, your messages are added to the conversation record as comments and are visible to the user.

What to do next

If necessary, you can open a new HR case or incident from the conversation for further investigation. You can also transfer the conversation to a different agent or queue, or escalate the conversation to a higher priority queue.

Create an HR case from a chat

If an HR chat results in the need to open a case, create the case directly from the conversation.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.case_writer.

Note: Connect Support has been deprecated and is no longer supported or available for new activation. For similar capabilities, please move to Advanced Work Assignment and Agent Chat. For details, see Move from Connect Support to Advanced Work Assignment and Agent Chat.

About this task

When you create an HR case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

Procedure

1. Navigate to **All** > **Connect** > **Connect Support**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon ( ).
3. Under **Cases**, open an HR conversation.
4. At the bottom of the conversation, click the menu icon ( ) to open the Connect actions menu.
5. In the Connect actions menu, select **Create HR Case**.
   A new case form opens in a record tab. The system automatically sets certain fields based on conversation details.
6. Complete the form as necessary and click **Submit**.

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Any comments or work notes in the record conversation appear as comments on the incident form. Work notes do not appear in the chat for the ESS user. The chat agent can select whether a message is a Comment or Work Note in the conversation.

a. In the record conversation, by the text entry field, click the message type icon ( ).

b. Select **Comment** or **Work Note**.

c. Enter a message.
By default, record conversation messages are added as comments.

Note: If you add an attachment to a record conversation, it is attached to the underlying record as well.

The system automatically shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table. Any new journal fields added to the record do not appear in the chat. The system also changes the document ID for the conversation to reference the incident number instead of the entry in the Chat Queue Entry table.

Capturing multiple job records for a user

Capture multiple job records for a user with the new Jobs (sn_hr_core_job) table. When creating HR cases, you can specify which job the case pertains to. For example, say that you have a payroll discrepancy case and the employee has two associated job records. When the case is created, you can specify which job the case is for.

Jobs table overview

Beginning in the New York release, you can use the new Jobs (sn_hr_core_job) table to store multiple job records per user and capture the job history of users within your organization.

Jobs table and HR Profile table

The HR Profile table has a reference to the Jobs table for the user's primary job.

HR Profile (sn_hr_core_profile) table

Field	Description
primary_job • Job start date • Job end date	Reference field to the Jobs (sn_hr_core_job) table.

For example, the following HR profile record is for Eva Seahorn. Eva was first hired as a UX designer in May 2017. In August 2018, Eva left the company. In June 2019, Eva was rehired as a marketing director. Eva has two associated job records, with the marketing director position as Eva's primary job.

- In the Employment Information related list, information about the primary job is displayed.
- In the Jobs related list, all of the associated job records are displayed.

Note: The employment start date represents the first day the user was employed with the organization. The job start date represents the first day of the user's current primary job. Because Eva left the organization in August 2018, but was rehired in June 2019. This represents Eva's new employment start date.

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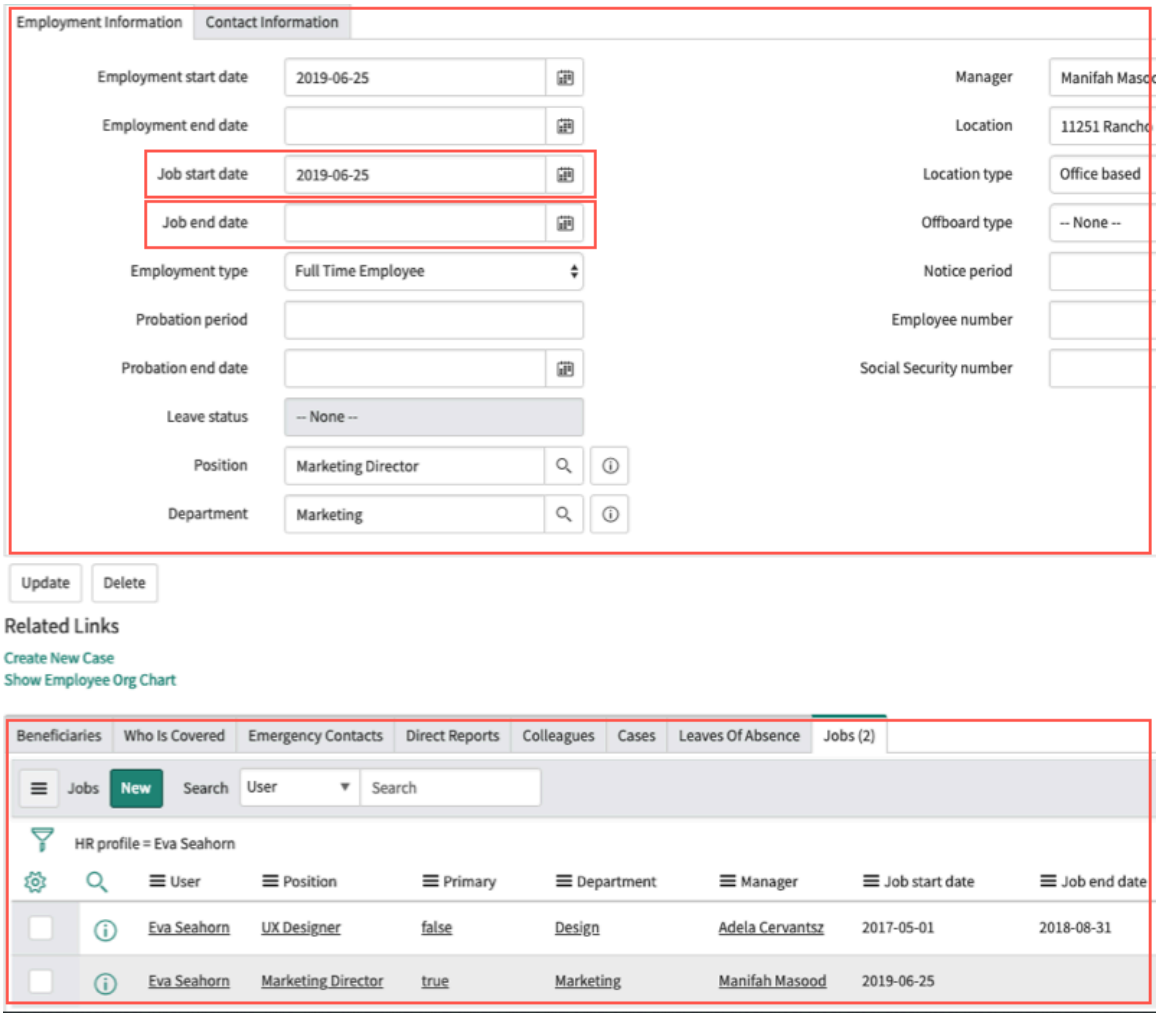

Jobs table and HR Case table

The HR Case table has a reference to the Jobs table for the subject person's job.

HR Case (sn_hr_core_case) table

Field	Description
subject_person_job	Reference field to the Jobs (sn_hr_core_job) table.

In the case of Eva Seahorn, for example, Eva was rehired as a marketing director in June 2019. Eva has two associated job records. When an onboarding case is created for Eva, the **subject_person_job** field enables you to specify which job the onboarding case pertains to. The onboarding case would be for the marketing director job Eva was rehired for.

Supporting multiple jobs in a lifecycle event

Use the Jobs table to create lifecycle event cases where you can specify which job the case pertains to. For example, say that you have an intern that is being transferred to a full-time position. The intern has two associated job records. When an onboarding case for the full-time position is created, the case is associated with the full-time job record, ensuring that downstream activity sets and activities are triggered based on information from that relevant job record. For more information, see Support multiple jobs in a lifecycle event.

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Related topics

hr_Utils - Global

hr_ActivitySet - Global

hr_ActivityUtils - Global

Standard Ticket Page view for HR Service Delivery

Configure your HR services to use the Standard Ticket page to provide a consistent user experience for your employees.

You can configure the appearance of your ticket page layout (such as header and tabs) from **Standard Ticket** > **Standard Ticket Configuration**. For more information, see Configure custom HR services.

For new and restarted instances, the Standard Ticket page view is available by default. For upgraded instances, you must configure the page route map. For more information, see Enable the page route map.

After you have configured the HR services and have completed the page route mappings, your HR requests appear in the Standard Ticket page view in the following format:

Standard Ticket page view

When you enable expected resolution time (ETTR), you can see the estimated time for your request. For more information, see Estimated time to resolve HR cases.

Configure custom HR services

Configure your custom HR services in the Standard Ticket page to provide consistent employee experience in the Portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.

   Important: By default, the standard ticket configurations are done for the following HR services:

   - sn_hr_core_case_talent_management
   - sn_hr_core_case
   - sn_hr_core_case_payroll
   - sn_hr_core_case_relations
   - sn_hr_le_case
   - sn_hr_core_case_operations
   - sn_hr_core_case_total_rewards
   - sn_hr_core_case_workforce_admin

2. Select your custom HR service.
3. On the form, configure the required fields:

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Ticket Configuration form

Field	Description
Table	COE table for which you want to configure the standard ticket page.
Active	Option to specify if the ticket configuration is active.
Application	Application associated with the ticket configuration.
State field	Any field of the task-extended table. By default, this field is mapped to the **State** field of the task-extended table. Configure the form to add this field. **Note:** You cannot add fields for any of the following information: ○ Number ○ Short description ○ Created date ○ Updated date ○ Watch list ○ Any user input such as comments and work notes
Info Region	
Show 'Description'	Scenario where the request description should be displayed. Possible options are: ○ None ○ Always ○ When no variables **Note:** When displayed, you can expand and collapse the description.
Advanced	Option to specify that a widget should be displayed in the info region.
Info widget	Widget that should be displayed in the info region. This field appears only when the **Advanced** check box is selected. **Note:** By default, the HRM Case Info widget is used to display the HR case-related information.
Info widget parameters	Comma-separated list of info widget parameters. This field appears only when the **Advanced** check box is selected.
Info fields	Fields that should be displayed in the info region. This field disappears when you select the **Advanced** check box.

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Field	Description
	Note: You cannot add fields for any of the following information: ○ Number ○ Short description ○ Created date ○ Updated date ○ Watch list ○ State ○ Any user input such as comments and work notes
Action Region	
Action widget	Widget to specify the actions available in the info region. **Note:** By default, the HR Standard Ticket Actions widget is used.
Action widget parameters	Comma-separated list of action widget parameters.

Note:

- By default, two types of tabs are activated and configured: **Activity** and **Attachments** type.
- You cannot duplicate any tab type other than Custom.
- You can configure a maximum of five tabs.
- You can add only one of these tab types:
  - Variable Editor (Read-Only)
  - Variable Summarizer

4. Right-click the header menu and click **Save**.
5. On the Tab Configurations related list, configure the fields.

Tab Configuration form

Field	Description
Type	Tab type based on which a widget is displayed. Possible options are: ○ None ○ Activity ○ Attachments ○ Custom ○ Variable Editor (Read-Only) ○ Variable Summarizer
Tab name	Name of the tab.

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Field	Description
Application	Application associated with the ticket configuration.
Order	Order in which the tab should be displayed in the tabs section.
Visible	Conditions for the tab visibility.
Widget	Widget that should be displayed in the tabs section. This field appears only when **Custom** is selected from **Type**. **Note:** For the **Tasks/To-dos** tab, by default the HRM Task Parent widget is used. For the **Approvers** tab, by default the HRM Approval Tab widget is used. For the **Attachments** tab, by default the HR Standard Ticket Attachments widget is used. This widget also displays employee documents (EDM).
Widget parameters	Comma-separated list of tab widget parameters. This field appears only when **Custom** is selected from **Type**.

6. On the Ticket Configuration form, click **Update**.

Enable the page route map

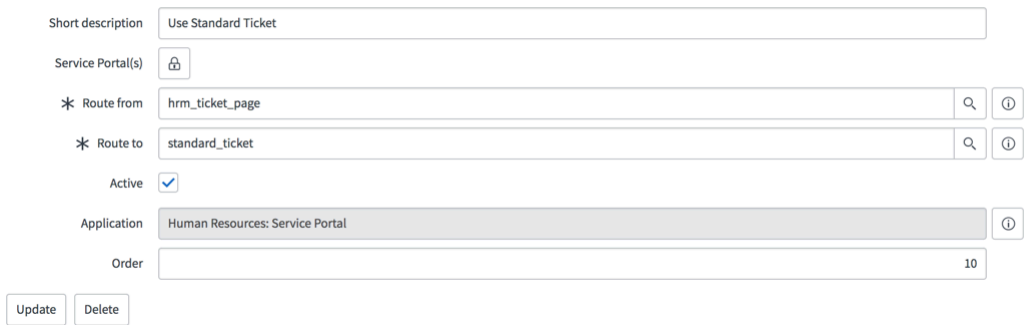
If you have upgraded your instance, redirect your HR ticket pages to the Standard Ticket page in Portal. View your HR requests in the Standard Ticket Page view.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Page Route Maps**.
2. Create the page route map from **hrm_ticket_page** to **standard_ticket**.

   Note: **hrm_ticket_page** is available only when you have the Employee Center [com.sn_hr_service_portal] plugin.



3. Create the page route map from **hrsp_ticket** to **standard_ticket**.

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Note: **hrsp_ticket** is available only when you have Human Resources Scoped App: Core [com.sn_hr_core] plugin, without the Employee Service Center [com.sn_hr_service_portal] plugin.



4. Create the page route map from **ticket** to **standard_ticket**.

Note: **ticket** is available only Non-HR catalog items.



Translations for HR cases and tasks

Enable translations on HR case and task templates so that employees can view the short descriptions and descriptions of their HR cases and tasks in their preferred language.

Configure the global descriptions for translations for an HR template

Configure an HR case or task template to enable translations. You can provide the global descriptions for translations in multiple languages so that users can view the short descriptions and descriptions of their HR cases and tasks in their preferred language.

Before you begin

Make sure to activate the languages that you want to support translations for.

Role required: admin

Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Templates**.
2. Click **New** or open a record.
3. Fill in the fields on the form, as appropriate.

   For details on how to how to configure an HR case or task template, see:

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- Configure an HR case template
- Configure an HR task template

4. To enable translations, make sure that the **Use global descriptions for translations** field is selected.
   When selected, the **Global short description** and **Global description** fields display.
5. Provide the global short description and description for each of your activated languages.

   Note: Make sure to provide global descriptions for each supported language. You cannot select the **Use global descriptions for translations** option within a single HR template for some languages and not others.

   a. Go to **System Systems** > **General**, and select the language that you want to provide translations for.

      Example
      For example, you can set the language to Spanish.

   b. On the HR template form, provide the global short description and description in the selected language.

      Example
      For example, you can provide the global short description and description for dental benefits in Spanish.

   c. Repeat the process for each language you are supporting.

      Example
      For example, if English, Spanish, and Korean are activated on your instance, then make sure to provide global translations for each of those languages in the HR template.

6. Click **Submit** or **Update**.
7. If you are configuring an HR case template, then you can also update the corresponding HR service to use case headers that support the use of global descriptions.

   a. Navigate to **HR Administration** > **HR Services** > **HR Service Configuration**.

   b. Open the corresponding HR service record.

   c. Update the following fields:

      Corresponding HR service record form

Field	Value
Opened for / Approver view	Opened for/approver case header configuration using global descriptions
Subject person / Task assignee view	Subject person/task assigned to case header configuration using global descriptions

   d. Click **Update**.

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Example: Dental benefits enrollment

This is an example of how the global short description and description displays for the Dental Benefits Enrollment/Modification HR service in the Employee Service Center when the language is set to Spanish.

Employee Profile table

The Employee Profile (sn_employee) plugin provides an Employee Profile (sn_employee_profile) table that makes the employment start date and employment end date fields available outside of HR Service Delivery. For example, the table can be used with Strategic Portfolio Management to update the resource capacity of users.

Overview

Use the Employee Profile (sn_employee_profile) table to make the **employment_start_date** and **employment_end_date** fields available outside of HR Service Delivery.

Learn more about the Employee profile.

Employee Profile (sn_employee_profile) table

Field	Description
user	Reference to the User (sys_user) table.
employment_start date	Represents the employment start date.
employment_end_date	Represents the employment end date.

If you are using Employee Profile with HR Service Delivery

When you activate the Employee Profile plugin, the following fields are pulled from the HR Profile (sn_hr_core_profile) table to populate the Employee Profile (sn_employee_profile) table.

HR Profile (sn_hr_core_profile) table

Field	Description
employment_start_date	Represents the employment start date.
employment_end_date	Represents the employment end date.

Sync employee profile from HR profile is a one-time scheduled job that will pull all users with their corresponding employment_start_date and employment_end_date values from the HR Profile table upon plugin activation. Subsequent updates will be made by the **Synchronize fields to HR profile** and **Synchronize fields to employee profile** business rules.

Note: If you need to run the one-time scheduled job again, make sure to first activate the job and allow for the invalidated RCA before running it. Do not run the job on a scheduled basis.

Activation information

You must activate the Employee Profile (sn_employee) plugin to use the Employee Profile table with your application.

Note: If you are using the table with Strategic Portfolio Management, see Update the resource capacity for more information.

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Activate Employee Profile

You can activate the Employee Profile plugin [sn_employee] if you have the admin role.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Employee Profile

Several types of components are installed with activation of the Employee Profile [sn_employee_profile] plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Roles installed with Employee Profile

Role title [name]	Description	Contains roles
Employee Profile admin [sn_employee.admin]	Grants access to create, read, update, and delete for the Employee Profile table.	None

Scheduled jobs installed

Scheduled jobs installed with Employee Profile

Scheduled job	Description
Sync employee profile from HR profile	HR Service Delivery only: One-time scheduled job that pulls all users with their corresponding employment_start_date and employment_end_date values from the HR Profile (sn_hr_core_profile) table.

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Tables installed

Tables installed with Employee Profile

Table	Description
Employee Profile [sn_employee_profile]	Employee Profile table.

Link generator for HR Service Delivery

Use the Link Generator to create a link on an HR case form that accesses information outside of the application to help fulfill the case.

Create links on the HR case form to payroll, social media, or to products to fulfill computer or software requests. Generate URLs to manage content, knowledge articles, and catalogs.

An example would be to create a link to a third-party HR application from the HR case form so HR agents can access additional profile information. Creating these types of links assume:

- The HR agent has valid credentials to access a third-party HR application.
- The link takes the HR agent directly to the profile information in the third-party HR application and not to the home page.

The **Human Resources Scoped App: Core [com.sn_hr_core]** plugin activates the **Link Generator [com.snc.linkgenerator]** plugin.

The process for creating a link for a form is:

- Create a record for the target website name and URL in **Define Link**(Link Generator Sources).
- Create a record for the deep link name, website name, link type, and script in **Define Link Parameters** (Link Generator Services).
- Map information like the button name, button location type, form (table), Location (field), and Deep link name in **Define Button** (Link Generator Mappings).

Add or modify an HR deep link

Use the **Define Link** (Link Generator Sources) to create a record for the target website name and URL.

Before you begin

Role required: link_generator_writer

Procedure

1. Navigate to **All** > **Link Generator** > **Define Link**.
2. Click **New** or an existing record.

Field	Description
Website name	Enter the external website name that is the tar get for the link.
Website URL	Enter the URL of the website.

3. Click **Submit** or **Update**.

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4. Navigate to **Define Link Parameters**.
5. Click **New** or on an existing record.

Field	Description
Deep link name	Enter a name or location within the website you are linking to.
Value	A unique link generator service value auto matically created from the Deep link name en tered.
Website name	Enter the name of the website you are linking to.
Link type	Select: ○ Button link: Creates a button that links to the website. ○ Generated link: Use to generate a URL that you can copy and paste into any table with a field type of URL. For example, on the **Manage Content** form, create a URL con tent type. Then, copy and paste the URL in the Content URL field. Other examples in clude creating links to knowledge articles and catalogs.
Script	Enter a script that directs the user to the exter nal site.

6. Click **Submit** or **Update**.
7. Navigate to **Define Button**.
8. Click **New** or on an existing record.

Field	Description
Button name	Enter a name for the button that links to the outside website. What you enter here ap pears on the button.
Button location type	Select the location type for the button. ○ Standard form: Use this type to place a deep link on the legacy HR case form. ○ Custom form: Use this type to work with an API. ○ Agent Workspace: Use this type to work with HR Service Delivery Agent Workspace.
Form (Table)	Select the table that contains the field you want the deep link button to appear next to. For example, select the **HR Profile [sn_hr_ core_profile]** table when you want the deep link button to appear next to a field on the **HR Profile** form.

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Field	Description
Location (Field)	Select the field from the table selected that you want the deep link button to appear next to. For example, select **User** to place the deep link button next to the **User** field on the **HR Profile** form.
Deep link name	This information is pulled from the **Deep Link Parameters** (Link Generator Service) form.
Active	Check to make this mapping active and avail able for use.

9. Click **Submit** or **Update**.

HR flows and triggers

HR flows created in Workflow Studio use natural language to automate approvals, tasks, notifications, and record operations without coding.

Three new flows are available to automate the triggering of Lifecycle Events. The triggers are based on changes in the HR Profile [sn_hr_core_profile] or Job [sn_hr_core_job] tables. These flows reduce or eliminate the need to write business rules to trigger Lifecycle Events.

Note: Customize these flows to use in other Lifecycle Events other than on boarding events.

The following flows are installed with the Human Resources: Core application. These HR flows are deactivated by default.

New Hire on Boarding Case Trigger HR Profile

The trigger is based on the employee's start date in the HR Profile Table [sn_hr_core_profile]. If the employment start date is at or after today, the flow creates an HR Onboarding case. This flow runs every time an HR profile is created or updated.

For more information about the HR Profile, see Employee Profile table and HR Profile.

New Hire on Boarding Case Trigger Job

The trigger is based on the employee's start date in the Job Table [sn_hr_core_job]. If the employment start date is at or after today, the flow creates an HR Onboarding case. This flow runs every time an HR profile is created or updated.

For more information about the Job Table and related profile records, see Capturing multiple job records for a user.

Case Trigger Custom Condition

Table: HR Profile [sn_hr_core_profile]

This flow can be used as a template to create a customized trigger. The trigger is based on a custom date check for the employee start date. The default trigger is initiated two days prior to the employee start date. For more information about flows and triggers, see Flows.

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These flows create an HR case adding an entry in the HR Lifecycle Events Case [sn_hr_le_case] table. If multiple flows are active at the same time, there is a high probability of creating duplicate records and cases.

Note: Only one of these flows should be active at any given time for a particular lifecycle event.

Activate an HR flow

HR flows help automate task and case creation.

Before you begin
Role required: admin

About this task
There are three HR flows installed with the Human Resources: Core application.

- New Hire on Boarding Case Trigger HR Profile
- New Hire on Boarding Case Trigger Job
- Case Trigger Custom Condition

Activation is immediate. These flows create an HR case adding an entry in the HR Lifecycle Events Case [sn_hr_le_case] table. If multiple flows are active at the same time, there is a high probability of creating duplicate records and cases.

Note: Only one of these flows should be active at any given time for a particular lifecycle event.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Open the flow you want to activate.
3. Click the **Activate** button.

Employee passport

Enable employee's data export, which can be used by any other agency or department for tracking, compliance, and regulatory purposes.

This feature makes employee profile data, such as employment history and progression to be made available across different ServiceNow instances.

As an HR agent, you can extract the employment history of an employee by performing the following steps:

1. Create a case for the employee with the HR service as Generate Employment History. A document template, Employment History, is automatically attached to the case.

   Note: HR Admin with the sn_doc.writer role can configure the fields to be available in the Employment History document template.

2. Use the **Generate Attachments** option in the document template to generate the employment history in a PDF, and attach it to the case.

Use HR Case Management

You use the Case and Knowledge Management application to create, view, or edit HR cases in the scoped version of HR. HR cases are created from HR requests or inquiries related to HR

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account or systems, benefits, payroll, performance management, reporting, talent acquisition, time and expense reporting, and more.

Self-Service HR case creation

From the Employee Center, employees can inquire or request HR services from the following categories:

- Benefits
- Employee Data Management
- Employee Relations
- General
- HR Systems
- Payroll
- Talent Management
- Visas

An HR case is created when an HR service is requested through the Employee Center.

HR agent case creation

Employees can inquire about HR services via email, chat, or phone. HR agents can create an HR case based on a Center of Excellence (COE) or HR service.

After an HR case is created, it is assigned to an HR agent and/or an assignment group via the HR service and associated HR template.

HR cases can have one or more associated HR tasks or HR child cases that make up the parent case.

Example HR request

An employee named Alan wants to find out about the dental plans offered:

1. Alan submits an HR request through the Employee Center asking about one of the dental plans offered.
2. An HR case is created and assigned to an HR agent.
3. The HR agent can answer the inquiry by phone, email, chat, or through the Comments section of the HR case.
4. If the answer satisfies the inquiry, the HR case can be closed.

Create an HR case

Create HR cases for employees or other individuals that require an HR service. Note that employees can also use the HR Service Portal to create HR cases for themselves.

Before you begin
Role required: sn_hr_core.case_writer

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About this task

- For information about configuring case creation, see Configure how HR cases are created.
- Employees can also create HR cases for themselves using the record producers in Employee Center. The details entered by the employee get recorded in the description of the HR case.

> **Note:** If a value entered by the user does not match with the value in the HR profile of opened for, only then the value entered by the user gets recorded in the description of HR case. This behavior is not observed when the HR service of the case is either New Hire Onboarding or New Hire Journey.

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
   Or, from any case list, click **New**.
2. Determine the person for whom you are filing the case.

Status of the person related to the case	Action
Anonymous employee or external individual	Select **Skip verification** to create the case without having to enter an employee name or case number. Selecting this option takes you directly to the **Case Details** section and the **Employee information** section is not displayed. **Note:** The **Skip verification** option is displayed only if **Allow skipping verification** was selected during the configuration of HR case creation.
An employee	Validate the employee by using the **Search Employee** field to search for the employee. You can search by employee name, case number, or any indexed field on the HR Profile of the sys_user table. Additional information about the employee appears in the **Employee Information** section to help verify that you are creating an HR case for the correct person.

3. Fill out the information in the **Case Details** section.

Case Details fields

Field	Description
COE	The **Center of Excellence** associated with the HR case you are creating. Selecting a COE filters the choices for HR service. See HR Centers of Excellence data model.

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Field	Description
	Note: If an HR service is selected first, the associated COE automatically populates.
HR service	The HR service based on the COE selected or what you select based on communication with the employee request. The HR services that are available to an employee are filtered by: ○ The COE selected ○ HR criteria for the **Subject person** based on the HR service configuration The limit services filter on the **Case Creation Configuration** form. If the HR service field is empty, ensure that you did not remove the **Opened for** field.
Document Template Type	The category for the document template. **Note:** This option appears only when the Document Templates [com.snc.document_templates] plugin is activated, and the **Document Template Type** field is selected while configuring the HR service.
Document Template	The document template associated to the case to generate document template tasks. **Note:** This option appears only when the Document Templates [com.snc.document_templates] plugin is activated, and **Document Template** was selected when the HR service was configured.
Work notes	Information specific to the case that can help other HR agents. Text in the **Work Notes** field is not visible to the user named in the **Subject person** field. The sn_hr_core.restrict_guest_email system property allows a user to send an email from a personal email account referencing an HR case. If this property is set to false (the default), the text from the email appears in the Work notes field. **Note:** You can translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.

4. Select the person responsible for the service request in the **Opened for** field.
   - If the case is being created by the person making the request, the values for **Subject person** and **Opened for** are the same.
   - If the case is being created for a different user, for example, a manager filing a case for an employee, use the choice list to select a different user.

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5. Select the subject of the case in the **Subject person** field by selecting the Lookup using list icon ( ) and searching for and selecting another employee.

   Note: Advanced reference qualifiers on a reference field is not supported in the case creation configuration page. When the limit user search filter is applied to the employee search, it will not be applied to **Opened for** and **Subject person**.

6. Click **Create Case**.
7. **Optional:** Continue working on the case.
   For more information, see Work an HR case

Result

The **HR case** form appears with additional information about the case. The values selected for the **COE** and **HR service** fields determine the fields that appear.

Open an HR case to create a Journey Accelerator action plan

Journey Accelerator action plans can be created by opening an HR case with a related lifecycle event.

Before you begin

Role required: sn_hr_core.case_writer

About this task

When the Create Journey Accelerator Action Plan template is configured to automatically create Journey Accelerator action plans, a task is created and assigned to a manager for review.

When the template is not configured to automatically create Journey Accelerator action plans, a to-do task is created. The task is assigned to the manager (**Opened for**) to create a plan. The to-do contains the following information pre-filled in the plan:

- Who is this plan for (mapped from the subject person)
- Plan type (mapped from the activity)
- Publish date (mapped from the activity)

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
2. Enter the name of the new employee in the Search for Employee field.
3. Fill in the Case Details:
   - **COE**: `HR Lifecycle Events Case`
   - **HR service**: `New Hire Onborading`
   - **Opened for**: `managers name`
   - **Subject person**: `new hire name`
4. Click **Create Case**.
5. Review all the fields and make any updates that are needed and click **Ready for Work**.
   A to-do task is created in the managers to-do list in the Employee Center. Managers review and publish plans from the Employee Center.

Related topics

Working with Journey Accelerator plans

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Request a background check through a third-party background check provider

Request a background check for an employee through a third-party background check provider such as First Advantage, Accurate, or Sterling.

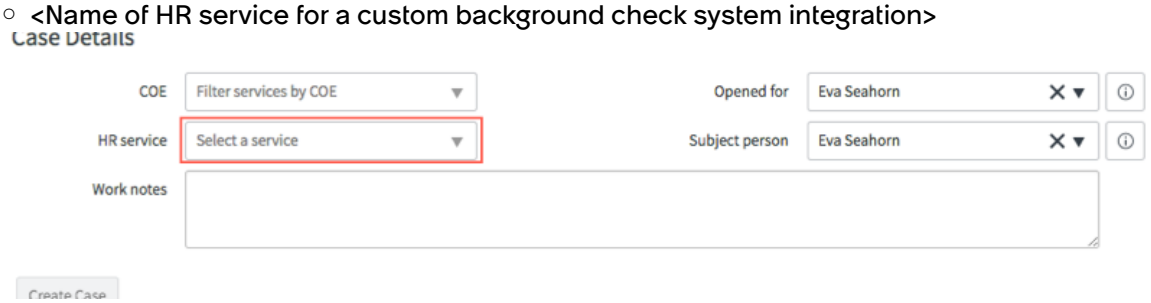
Before you begin

An HR integrations administrator must have set up the integration between HR Service Delivery and the third-party background check system before requests can be made. See HR Integrations for more information.

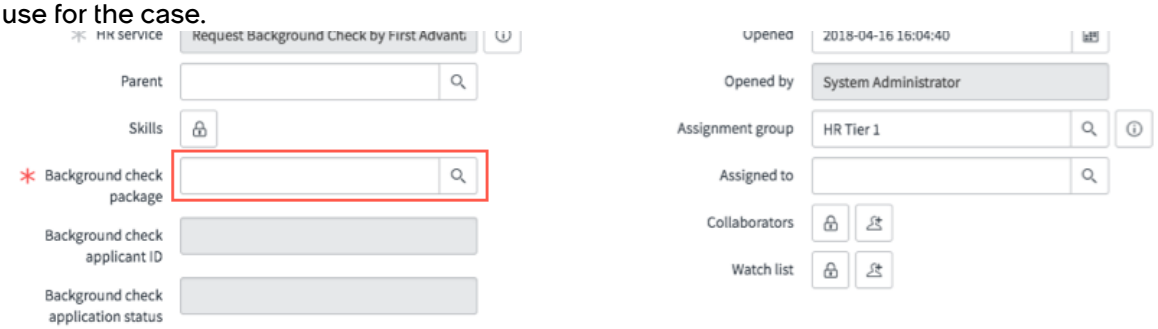
Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
2. In the **Search for Employee** field, select the employee you are creating the case for.
3. In the **Case Details** section, in the **HR service** field, select one of the following services to request a background check through the third-party background check provider.
   - Request Background Check by First Advantage
   - Request Background Check by Accurate
   - Request Background Check by Sterling
   - <Name of HR service for a custom background check system integration>



4. Fill in the other fields on the form, as appropriate.
   For further details on the form fields, see Create an HR case.
5. Click **Create Case**.
6. In the **Background check package** field, select the background check package you want to use for the case.



7. Click **Ready for Work** to send the background check request to the appropriate third-party background check provider.

Result

As the background check application progresses, the status is updated in the **Background check application status** field.

What to do next

To view the background check details, navigate to the **Background Check Details** related list.

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Request an electronic signature through the Docusign service

Request an electronic signature through the DocuSign service. When the case state changes to **Ready**, the flow triggers and creates DocuSign tasks for all of the signers. For parallel signing, the tasks are assigned all at once. For serial signing, the tasks are created in the order defined.

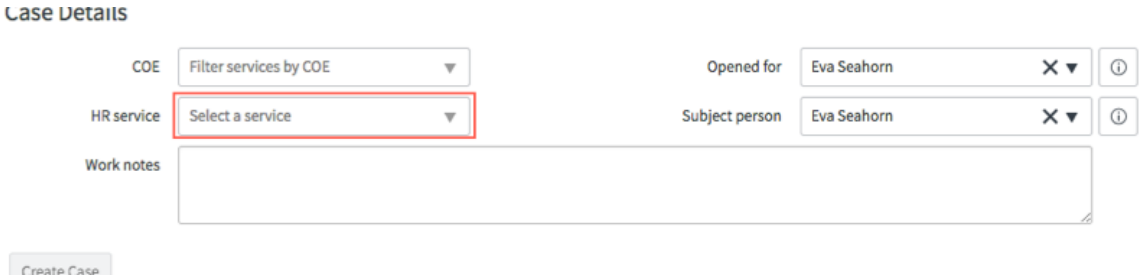
Before you begin

An HR integrations administrator must have set up the integration between HR Service Delivery and the DocuSign system before requests can be made. See Integrating with the DocuSign service for more information.

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
2. In the **Search for Employee** field, select the employee you are creating the case for.
3. In the **Case Details** section, in the **HR service** field, select an HR service.
   - Request Signature using DocuSign on Adhoc Document
   - Request Signature using DocuSign Template
   - <Name of custom HR service>



4. Fill in the other fields on the form, as appropriate.
   For further details on the form fields, see Create an HR case.
5. Click **Create Case**.

What to do next

When the case state changes to **Ready**, the flow triggers and creates DocuSign tasks for all of the signers. For parallel signing, the tasks are assigned all at once. For serial signing, the tasks are assigned in the order defined.

Note:

- The tasks are created using the HR task template named DocuSign Task Template.
- Users with the sn_hr_core.admin role can track the flow execution with the **Show Flow** related link. If a case is cancelled from platform, you must manually cancel the associated flow. Otherwise, the flow will remain in waiting. To cancel the flow, click the **Show Flow** related link to open the flow designer in a new window, and then click **Cancel Flow**.
- Signers must complete their DocuSign tasks through a self-service portal such as the Employee Center. Signing in platform is not supported.

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Case and task status change

Action	Result
Document signed by all	• Case and tasks closed completed • Signed document(s) attached to case and tasks
Document declined	• Case and declined task closed incomplete • Pending tasks canceled • No attachments to case
Document voided or flow errored	• Case closed incomplete and tasks canceled • No attachments to case

Request an electronic signature through the Adobe Acrobat Sign service

Request an electronic signature through the Adobe Sign service. When the case state changes to **Ready**, the flow triggers and creates Adobe Sign tasks for all of the signers. For parallel signing, the tasks are assigned all at once. For serial signing, the tasks are created in the order defined.

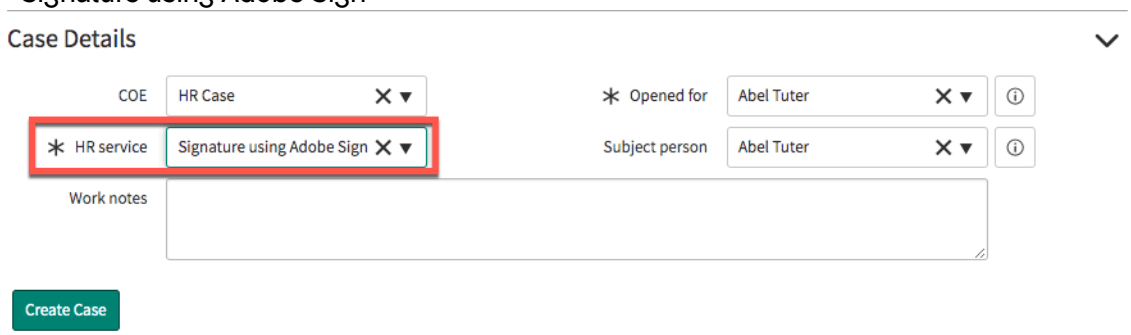
Before you begin

An HR integrations administrator must have set up the integration between HR Service Delivery and the Adobe Sign system before requests can be made.

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
2. In the **Search for Employee** field, select the employee for whom you are creating the case.
3. In the **Case Details** section, in the **HR service** field, select an HR service.
   - <Name of custom HR service>
   - Signature using Adobe Sign



4. Fill in the other fields on the form, as appropriate.
   For further details on the form fields, see Create an HR case.
5. Click **Create Case**.

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What to do next

When the case state changes to **Ready**, the flow triggers and creates Adobe Sign tasks for all of the signers. For parallel signing, the tasks are assigned all at once. For serial signing, the tasks are created in the order defined.

Signers must complete their Adobe Sign tasks through a self-service portal such as the Employee Center. The Adobe Sign task is displayed as a URL in the to-dos page in the Employee Center.

On clicking the URL, the signer is directed to the Adobe Sign system to sign the document. After completing the task, the signer is redirected to the to-dos page in the Employee Center. The status of the Adobe Sign task is not updated immediately because the callback is asynchronous.

Note:

- The Adobe Sign tasks are created using the HR task template named the Adobe Sign task template.
- Auto-close integration type tasks are created using the HR task template.
- Users with the sn_hr_core.admin role can track the flow execution with the **Show Flow** related link. If a case is canceled from platform, you must manually cancel the associated flow. Otherwise, the flow remains in waiting. To cancel the flow, click the **Show Flow** related link to open the flow designer in a new window, and then click **Cancel Flow**.

Case and task status change

Action	Result
Document signed by all	• Case and tasks closed completed • Signed document(s) attached to case and tasks
Document declined	• Case and declined task closed incomplete • Pending tasks canceled • No attachments to case
Document voided or flow errored	• Case closed incomplete and tasks canceled • No attachments to case

Work an HR case

After initial creation of an HR case, the next steps are to change the state, provide additional information, and ensure that any outstanding tasks are completed.

Before you begin

Role required: sn_hr_core.case_writer

HR case creation and completion require different information depending on the Center of Excellence (COE) and HR service selected. The HR service an employee is requesting determines the type of HR case.

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Procedure

After employee verification, click **Create Case**.
The following fields appear:

Create case form

Field	Description
Number	An HR case number is assigned and is a unique identifier, cannot be changed, and has an HRC prefix.
Parent	Populates the parent case when the displayed case is a child. For example, a **Request onboarding** case has multiple child cases and tasks under it.
Skills	The required skills of the person assigned to this category of HR case. Skills can auto-populate based on the HR case template associated with the HR service.
Company	Company account to which the remote case is associated.
Remote case	Option indicating that the HR case is created due to a provider task from a consumer instance. **Note:** This option appears only when the HR Multi Instance Integration for Provider (sn_hr_mii_provider) plugin is installed.
State	The state of the case. The state can auto-populate based on the HR case or task template associated with the HR service. • Draft: The default state for a case when it is first opened. **Note:** Can only be changed to Ready, Closed Complete, Closed Incomplete, Cancelled, or Suspended. • Ready: The case is ready to be worked on. • Awaiting Approval: Requires approval before it can move to the next state. **Note:** Can only be changed to Ready, Closed Complete, Closed Incomplete, Cancelled, or Suspended. • Work in Progress: The case is assigned and being worked on. • Closed Complete • Closed Incomplete • Cancelled • Awaiting Acceptance: The **Opened for** person must accept the HR case before it can proceed. For example, a **Request for Onboarding** case was opened for a hiring manager. The

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Field	Description
	hiring manager must accept the case before it can move to the next state. • Suspended: Use to temporarily prevent violation of a service level agreement (SLA). Refer to Suspend and resume an HR case. **Note:** The **State** cannot be edited in List view.
Priority	The precedence of the case, based on the **HR service**. The priority automatically overrides the template and changes to **2 - High** for users flagged as VIP. Configured in HR Properties (sys_property).
Source	From where the case originated. Sources are: • Not selected • Self Service • Phone • Chat / Connect / Live Feed • In Person • Email • Other • Virtual Agent **Note:** Cases created through email or self-service are automatically moved to **Ready** state and assigned to a group or user.
Opened by	The user who created the case.
Assignment group	The group the record is assigned to. If the group is not set automatically, assign an HR group to provide a selection of HR users in the **Assigned to** field. Assignment groups are restricted to those groups with a type of human_resources. To change the **Assignment group**, the **Assigned to** agent must be a member of the new group and the **State** must be **Ready**. **Note:** To automatically assign a group to an HR case, see Assignment and matching rules in HR and Configure an HR case template.
Assigned to	The user assigned to work on this case. When a group is automatically assigned, a user from the group is automatically assigned when the case is created. If the user is not auto-assigned, click the **Lookup using list** icon to select a user who is a member of the selected assignment group. To change the **Assigned to** HR agent, the agent must be a member of the **Assignment group** and the **State** must be **Ready**.

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Field	Description
	If **Assigned to** is left blank, some features are not available from the Employee Center ticket page. For example, the **Ask a Question** link to chat directly about an HR case cannot assign an agent. Comments or work notes do not appear on a case until an agent is assigned.
Collaborators	Add collaborators or other HR agents to the case. Only HR agents can be added as collaborators. This action permits the original agent to still track the case. Or, an HR agent can add another HR agent as a collaborator to request help. Adding a collaborator populates the case on the collaborations list. Other factors related to adding collaborators: • Collaborators can remove themselves from the case. To remove yourself, highlight your name in the **Collaborators** list and click the **X**. • Collaborators are not required to be part of the assignment group. • Assigned to person can add or remove collaborators. • Collaborators cannot add or remove collaborators. • Notifications are sent to collaborators when added to the HR case. Adding collaborators can alleviate the amount of emails requesting help on an HR case by consolidating communication. Collaborators and the COE for the HR case can conflict. The basic rules are: • For all HR cases, collaborators override any security on a COE. For more information, see Create COE security. • Employee Relations (ER) cases can override collaborators when restrictions apply. For more information, see Configure an employee relations case restriction. **Note:** Agents must have the ER case writer [sn_hr_er.case_writer] role in order to be a collaborator.
Case support team	Employees assigned to answer questions about onboarding a new hire. Only appears for Lifecycle Events cases. You can add users or define a group that can support the **Subject person** for a Lifecycle Event case. The **Subject person** can communicate with the case support team while the case progresses.
Watch list	The list of users who receive notifications regarding this case.

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Field	Description
	Anyone in the company can be added to the **Watch list**. For example, an employee requests a travel visa. Add the manager of the employee to ensure that updates are communicated. Click the **Edit Watch List** icon to add users. Click the **Add me** icon to include yourself.
Min ETTR	Indicates the minimum estimated resolution time in days for case completion. Estimate is based on the historical data taken for resolving similar HR cases. **Note:** Available after activating Predictive Intelligence ETTR capability
Max ETTR	Indicates the maximum estimated resolution time in days for case completion. Estimate is based on the historical data time taken for resolving similar HR cases. **Note:** Available after activating Predictive Intelligence ETTR capability
Short description	Populates from the HR service. After the case is created, you can modify the description.
Description	You can add a longer, detailed description after the HR case is created. Use the Rich Text Format (RTF) tools to format your text. Rich text formatting also appears for a case or task description on the Employee Center.

The following embedded lists appear:

Special Handling Notes List

Shows notes of messages specific to an HR case or conditions. For more information, see Add special handling notes for an HR Service Delivery case.

Knowledge results

Shows knowledge results based on the short description of the HR case. There are two tabs. One showing articles that you have access to, and one showing articles that the **Opened for** employee can access. Click **Attach** to make the article visible to the person that the HR case was opened for in the **Additional comments** section. See Attach knowledge articles to an HR case for more information.

Tasks

Appears when there are tasks associated with the case. Click a task to view or update it.

Note: When you close the parent case, all child tasks are assigned the Closed Incomplete state.

Fulfillment Instructions

View information on how to complete the case. This information is defined in the HR Service configuration.

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A checklist outlining the exact steps to complete appears when configured by the HR service. See Configure an HR service.

Comments and Work Notes

You can add comments or work notes to the case to provide details about the case. **Work notes** are not visible to the **Subject person**.

> **Note:** Translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.

If your company uses templated snippets and depending on the conditions defined, the **Responses** button appears in the form header:

a. Click the **Responses** button.

b. Select a response template.

c. Click **Copy to clipboard**.

> **Note:** This button copies all text in the message field. To copy partial text, highlight the text, and use the copy command. You can also edit the text after pasting it.

d. You can paste the text into the **Work Notes**, **Comments**, or any text field.

Parental Leave Details

Appears for Parental Leave of Absence Request cases. Provides details about the leave request.

Parental Leave Details

Field	Description
Leave subtype	Identifies the role of the Subject person for parental leave of absence or the type of parental leave. Select: • Birthing parent • Partner of birthing parent • Adoption • Surrogacy • Foster placement
Leave status	Indicates the status of the parental leave. Select: • Requested • Approved • On Leave • Rejected • Completed • Cancelled
Child arrival date	The date the child is expected to arrive.

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Field	Description
	Note: Use this field for Adoption or Foster placement.
First day of leave	The date the employee is requesting to start parental leave.
Estimated last day of leave	The estimated date the employee is expected to end parental leave.
Due date	The birth date of the child. **Note:** Use this field when Birthing parent, Partner of birthing parent, or Surrogacy is selected from **Leave subtype**.

The following sections appear dependent on the type of task or case:

Reimbursement

Appears when a **Tuition Reimbursement Request** case is selected. Complete the fields related to the school or program name, justification, refund amount, and course dates.

Activities

Shows a list of all changes or updates to the HR case with the most current at the top.

Related Links

The following appear dependent on the type of case and roles associated with the user:

- Add Task: Click to add a task to the case. Refer to add a task.
- Show SLA Timeline: The SLA in timeline format that shows elapsed time.
- Show Workflow: The workflow that is associated with the case.
- Escalate Case: Click to escalate the case and provide a reason.
- Activity Set Execution: Populates for Lifecycle event cases. Click to view the Activity Set Contexts and each activity set.
- Repair SLAs: Click to repair any service level agreements associated with the case.
- Assign to Me: Appears when **Assignment group** is empty or if you belong to the Assignment group. Click to assign the HR case to you. A button also appears in the header form.

The related lists appear dependent on type of case or task:

Emergency Contacts

List of emergency contacts for the **Subject person**

Cases for Subject Person

List of cases associated with the **Subject person**.

Cases Opened for User

List of cases associated with the **Opened for** person.

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Attached Knowledge

List of knowledge articles attached to the HR service type.

Approvers

Lists employees that can approve changed information or the case, state of approval, comments, and associated dates.

Note: To reject an approval, users should have the HR case writer [sn_hr_core_case.writer] role.

Requested Item

List items like laptops, software, or furniture requested for the Subject person.

Requested Items

List of items requested for the case. Requested items are created from tasks, but do not appear under HR Tasks.

Similar Cases

List of related cases by type of request.

KB Articles Read by User

List of Knowledge Base articles read by the **Subject person**.

Direct Deposit for Subject Person

List of direct deposit information for the

Health Benefits for Subject Person

List of health benefits the subject person is enrolled. This tab only appears for health benefit cases.

Retirement Benefits for Subject Person

List of retirement benefits the subject person is enrolled. This tab only appears for retirement benefit cases.

HR Cases

All HR cases for the **Subject person**.

Child Cases

Lists child cases associated with this case. Click **New** to create a child case under the case you are working on.

Note: When you close the parent case, all child cases are cancelled.

Beneficiaries

Only appears for Total Rewards cases with an HR service type of Beneficiaries Add/ Modify or Inquiry.

List of beneficiaries for **Opened for** and **Subject person**.

View HR case information

There are multiple ways to find a specific HR case.

Before you begin

Role required: sn_hr_core.case_reader

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Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**.
   - **Assigned to me:** All cases assigned to the logged-in user.
   - **Open:** All open cases.
   - **Open - Unassigned:** Open cases that do not have agent assignments.
   - **Closed:** All closed cases.
   - **All:** All cases regardless of state or HR Service.
   - **Case SLAs:** All cases with SLAs.

   You can also view cases by HR service.
   - **Employee Relations Cases**: All cases related to disciplinary issues.
   - **HRIT Cases**: All cases related to HR accounts, password reset, HR Portal support, and HR reports.
   - **Payroll Cases**: All cases related to direct deposit, payroll discrepancy, and request corporate credit card.
   - **Total Rewards Cases**: All cases related to medical, dental, retirement, beneficiaries, leave of absence, pharmacy, relocation, vision, and tuition reimbursement.
   - **Workforce Administration Cases**: All cases related to employment verification letters and general inquiries.
   - **Lifecycle Events Cases**: Cases related to Onboarding or Account Notification.
2. Select the case to view.
3. Select a button.
   Depending on the case, different options are visible at the top.
   - **Discuss**: Opens a sidebar discussion where agents can discuss the case with users who have access to the record.
   - **Follow**: Track activity on the case or follow a record in Connect Chat to track activity as it happens. For more information, see Follow a record in Connect.
   - **Update**: Save and update the record. Takes you back to the list form.
   - **Suspend**: Suspends an HR case that does not have a state of closed or canceled. You can suspend the timing specified in the service level agreement (SLA) to perform additional research.
   - **Cancel**: Cancels the case.
   - **Responses**: Appears for inquiry cases and enables agents to copy a response template.
   - **Associate Interaction**: Select to associate an interaction to the case. Interactions are requests for assistance through a given channel, for example, a call or a chat. For more information, see Interaction Management.
   - Ready for Work: Select to change the state of the case to Ready and assign an agent.
   - **Close Complete**: Close the case and change the state to Complete.
   - **Close Incomplete**: Close the case and change the state to Incomplete.

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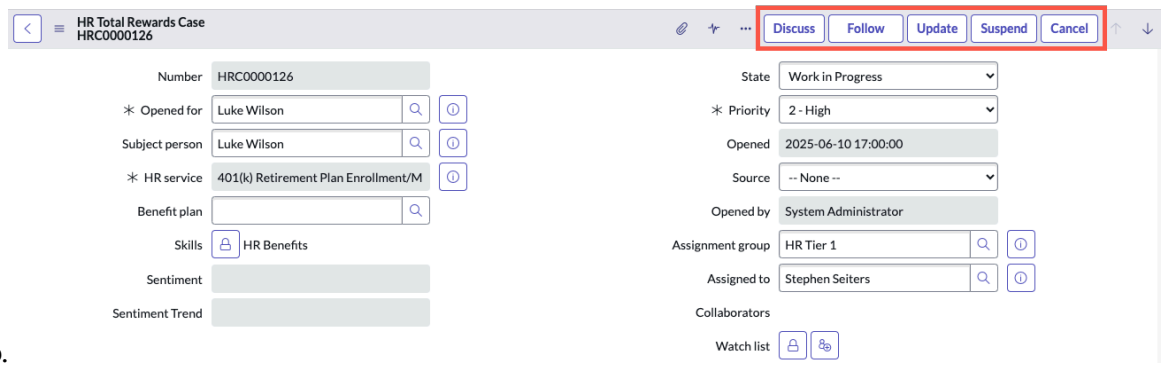
- **Preview Document**: Click to preview a document for accuracy before generating and sending it.
- **Sign Document**: For documents that require an HR signature, click to preview, sign, and save the document.

Buttons appear at the



top.

HR document generation

There are multiple ways to generate documents in HR Service Delivery.

- Automatically
- Multiple signatures are collected.
- Preview, Sign, or Save

Automatically

The document is made available for the subject person to sign. Only after the signature is added, the document will be generated automatically. Following are some examples:

- A document such as Tuition Reimbursement Request must be sent to the employee for signature. The Request Tuition Reimbursement service has a work flow that triggers a task for the subject person (employee) of the case.

  An administrator enables the**Automatically Create Draft Document** case option on the HR service and sets up the HR service. When a case is created with that HR service and its state is changed to Work in Progress or Ready, a task gets automatically generated for the employee with the document available for signing.

- A document such as Employee Verification Letter must be sent to the employee that does not require any signature.

  An administrator selects the template on the HR service. An HR case is created with that HR service. The HR agent previews the document using the **Preview Document** option, generates the document, and sends an email to the employee using the **Send email** option on the case.

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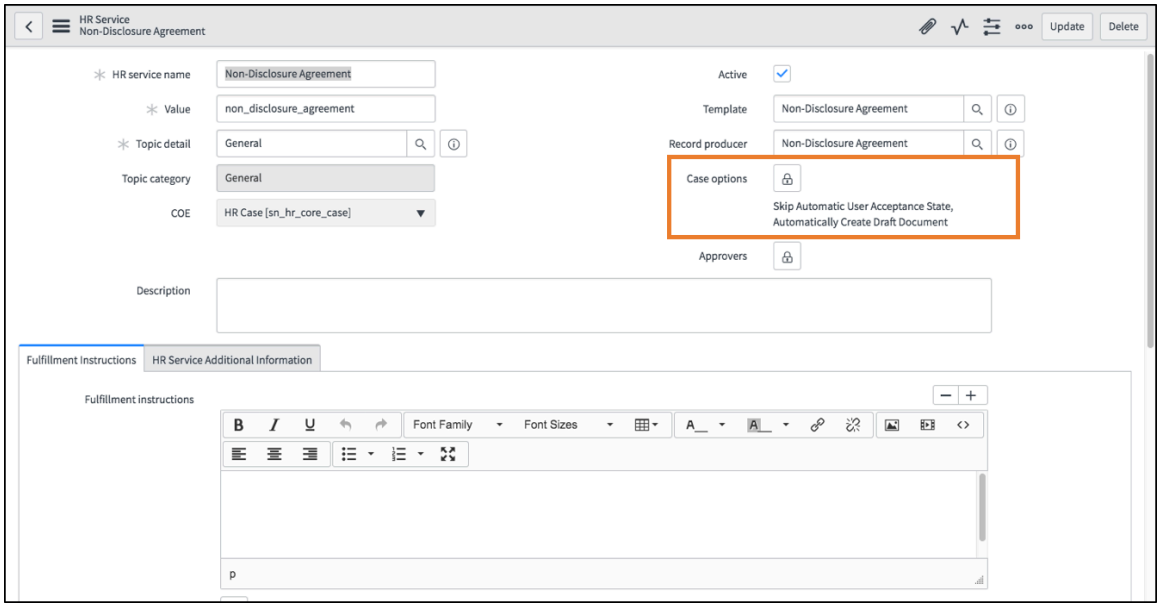


Multiple signatures are collected

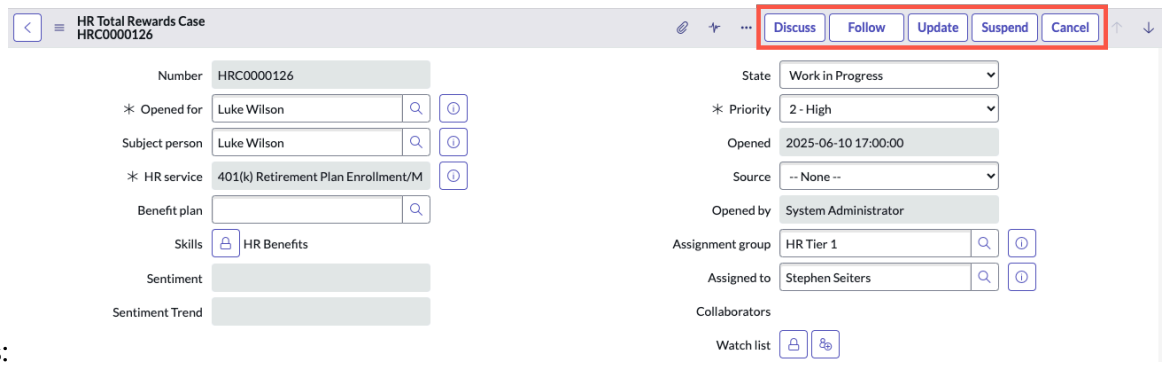
Documents like offer letters can require multiple signatures. When all signatures are collected, the document is automatically generated.

Note: For more information on setting this feature up, please see Advanced form configuration and Advanced Forms Management in HR Service Delivery.

Preview, Sign, or Save

Some documents require an HR agent to review, sign, or save it prior to sending it to a subject person for an HR case. An example is when a subject person requests an employment verification letter. This document requires an HR agent to review it for accuracy, sign it, and send it to the requested email address.

- Open a case requiring a document to be sent to the subject person.
- Ensure that the state is **Work in Progress**.
- The Form Header



shows:

- Click **Preview Document** to view the document.
- Click **Sign Document** for documents that require an HR signature.

Note: By default, the document is available for the subject person to view once you preview it. Change this behavior by changing the **State** field on the HR task template. You can access the task template from the HR Case form by selecting the **HR service** > **Service Activities** > **Child task template**.

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Change values

When there are errors in the document:

- Check the table the incorrect information is pulled from.
- Check the HR case to ensure correct case information.
- Check the document template for errors within the body of the document, incorrect field mapping, or variable information.

Edit a generated document

Support rendering values of variables, scripts, and blocks in edit mode in Preview Document. View the content of variables, scripts, or blocks rather than only viewing the variable or block names.

Before you begin

Role required: sn_hr_core.case_writer

Note: This feature is available only when the document is generated from a template in the Document Template plugin.

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases** > **Assigned to me**.
2. Open an HR case that is assigned to you.
3. Click **Preview Document**.
4. In the Preview Document window:
   a. Click **Edit Document**. Except for signature tokens, all other variables, scripts and blocks are rendered with their values.
   b. Add text, any valid tokens, or signature tokens.

      Note: Invalid tokens will be removed while saving.

   c. Click **Save changes**.
   The document is saved and sent as an attachment in document tasks that are created for participants.

Secure HR case attachments

Add an extra layer of security on attachments that are linked to a case. Grant access to attachments with sensitive or private data to groups, users, user criteria or roles.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**.
2. Open an HR case that is assigned to you.
3. Select a document from the **Documents** related list.
4. In Access Settings, enable the **Sharing Permissions** option.
   The following related lists appear. Perform the required actions:

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Sharing permissions options

Related list	Steps
Role Permissions	To grant access to a document based on a role: **a.** Click **New**. The Role Permissions modal opens. **b.** In the **Permission** list, select **Reader** or **Writer**. **c.** In the **User Role** field, select a value. **d.** Click **Submit**.
User Criteria Permissions	To grant access to a document based on user criteria: **a.** Click **New**. The User Criteria Permissions modal opens. **b.** In the **Permission** list, select **Reader** or **Writer**. **c.** In the **User Criteria** field, select a value. **d.** Click **Submit**.
User Permissions	To grant access to a document based on user permissions: **a.** Click **More**. **b.** Select **User Permissions**. **c.** Click **New**. The User Permissions modal opens. **d.** In the **Permission** list, select **Reader** or **Writer**. **e.** In the **User** field, select a value. **f.** Click **Submit**.
Group Permissions	To grant access to a document based on group permissions: **a.** Click **More**. **b.** Select **Group Permissions**. **c.** Click **New**. The Group Permissions modal opens. **d.** In the **Permission** list, select **Reader** or **Writer**. **e.** In the **User Group** field, select a value. **f.** Click **Submit**.

Sending an email from a case

Send any communication related to HR Workforce Administration cases using the Send email feature. Minimise typing errors by auto-populating the email address of the subject person (of the case) in the email.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Create a case under the HR Administration Workforce category.
3. For the **Verification of Employment service** HR service, fill in the **Document template category**, **Document template**, and **Subject person** fields.

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4. For the **Employee Verification Letter** HR service, fill in the **Document type**, **PDF template**, and **Subject person** fields.
5. Click **Preview document**.
6. In the window, click **Generate**.
   A document is generated and added as an attachment to the case.
7. Click **Send Email**.
   In the Send email window, the **Recipient email** field is auto-populated with the email ID of the subject person. Click **OK**.
   An email along with the generated document is sent to the intended recipient.

Checklists in HR cases

A feature of HR services is the ability to automatically add a checklist to an HR case. A checklist can serve as a reminder to the HR agent to ensure that the procedure is followed.

1. An employee submits a direct deposit request through the HR Service Portal. An HR case is created with the request.
2. A checklist appears on the HR case. Checklists can be added directly into the case or can be automatically added to a case from the associated HR service. For example, the checklist items are:
   - Verify that the employee has attached the correct direct deposit form.
   - Validate the direct deposit case information.
   - Send information to the payroll department, put case in progress.
   - Approve and close case when payroll completes setup.

Refer to Configure an HR service on adding a checklist automatically to an HR case.

Adding an HR task to an HR case

You can add, view, or work on HR tasks assigned to HR cases.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.case_writer

About this task

You can view HR tasks from the parent HR case or by going to **HR Case Management** > **HR Tasks**.

Procedure

1. Open an HR case.
2. Scroll to **Related Links** and click **Add Task**.
   - HR Task: Select to add an HR task.
   - Facilities Request: Select to create a facilities request such as desk or office space.
3. To create an HR Task, complete:

HR task fields

Field	Description
Number	The auto-assigned task ID.

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Field	Description
	Note: You cannot change this value.
Parent	The case number you are creating the task for.
Location	Select the location of the employee you are creating the task for. Location determines the HR agent assigned to the task. **Note:** For onboarding cases that task selecting an office or desk, the location determines the building map that shows.
Template	Click and select the HR Task template for this task. The HR Task template can auto-populate fields like the HR task type, short description, and the group or person the task is assigned to.
Stage	The stage (bundle) of a lifecycle event case. Use this field to define what activity set in a lifecycle event case you want to add an ad hoc task to. For more information, see Ad hoc cases and tasks for lifecycle event cases.
Due date	Select the date the task is to be completed.
Set reminder	Check to send an email notification based on the **Due date calculation** entries. **Note:** Reminders can also be set up on the **HR Task Template** to automatically populate.
Reminder template	Select the email template used for reminder notifications. Email templates are set up from **HR Administration** > **Email Content**. Refer to Add or modify email content for notifications.
When to send (days)	Enter the number of days before the task due date to send the reminder email.
Interval (days)	Enter the number of days the reminder email should be sent on an interval.
HR task type	When assigning a task to an employee, you can request how the employee acknowledges completion of the task. The tasks appear on the HR Service Portal for the employee. **Note:** The short description comes from the template, but you can add or modify it. It shows on the HR Service Portal.
	HR Service: An HR service fulfills the HR task. In the **HR Service** field, select an HR service.

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Field	Description	
		Note: **Bulk Parent Case** does not appear as a selection because it is only used when creating a parent case for child bulk cases. Refer to Create a bulk case request.
	Submit Catalog Item	A catalog item fulfills the HR task. In the **Catalog Item** field, select an active catalog item.
	Submit Order Guide	An order guide fulfills the HR task. In the **Order Guide** field, select an order guide.
	Collect Employee Input	Collects information from employees. In the **Employee form** field, select the employee form that the user fills out or verifies. **Note:** Employee forms are questionnaires built using the survey designer to collect information from employees. See Collect employee input for more information.
	Checklist	In the **Checklist Items** field, provide the checklist items.
	E-signature	User electronically signs a document. In the **E-signature template** field, select the e-signature template to use. **Note:** ○ E-signature is a scoped application that enables you to sign managed documents, knowledge articles, or HR document templates. You can type or draw your signature, credentials, or acknowledgment. See HR e-signature for more information. ○ If HR document template has a document type of e-signature template, select the HR document template that the signatory signs on the HR case form. See Select an HR document template for an e-signature task for more information.
	Credential	Indicates that you want the user to acknowledge reading a document by logging in with their login credentials. The **Acknowledgment text** and **Acknowledgement document** fields appear. Using these fields shows a check box and text above the login credentials. In the

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Field	Description	
		Acknowledgement document field, select a document that the user is asked to read. **Note:** This option is only available for existing customers that have not yet migrated to e-signature. See Migrate existing HR task templates and open HR tasks to e-signature for more information.
	E-Signature	Indicates that you want the user to provide an e-signature to acknowledge or validate a document. The **Acknowledgment text** and **Acknowledgement document** fields appear. Using these fields shows a check box and text above the e-signature. **Note:** This option is only available for existing customers that have not yet migrated to e-signature. See Migrate existing HR task templates and open HR tasks to e-signature for more information.
	Mark When Complete	Notify the user a **Completed** button appears on the HR Service Portal. Use the **Short description** to provide details about this task. **Note:** **Mark When Complete** changes the state of the task to **Closed Complete**.
	Sign Document	Requests the user to sign a document. An example is sending an education agreement to be signed for tuition reimbursement. The **Acknowledgment text** field appears. Using this field shows a check box and text above the signature. **Note:** This option is only available for existing customers that have not yet migrated to e-signature. See Migrate existing HR task templates and open HR tasks to e-signature for more information. After the user signs the document, the document is generated with the signature and attached to the task. The task is closed complete and the document is attached to the case.
	Take Survey	In the **Survey** field, select a survey that the user is assigned to take.

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Field	Description	
		Note: For lifecycle event cases, this feature also works if the subject person or anyone that has access to the original lifecycle event case can answer the survey question. For more information, see Triggering an activity from upstream activities.
	Upload Documents	Requests the person assigned to the task to upload documents. Examples are receipts, course registration, or transcripts for tuition reimbursement. Use the **Short description** field to provide instructions. **Note:** The task must be in **Ready** or **Work in Progress**.
	URL	The **URL** field appears. Enter a URL link that the user acknowledges when accessed.
	View Video	The **URL** field appears. Requests the person assigned to the task to view a video.
Activity	Shows when an employee responds or completes a task and shows task activities by employee and assigned HR agent.	
Optional	Check to make the task optional. The **Skip** button appears for a task in the **Open Case** page. The **Subject person** can skip the task or do nothing and the HR agent can close complete the case.	
State	The work status of the case. The states are: ○ Draft ○ Ready ○ Work in Progress ○ Closed Complete ○ Closed Incomplete ○ Cancelled ○ Skipped ○ **Note:** Change the state to **Ready** or **Work in Progress** for the employee to see the task that you created.	
Assignment group	The HR group the case is assigned to. If the group is not set automatically, assign an HR group to provide a selection of HR users in the **Assigned to** field. Assignment groups are restricted to those groups with a type of human_resources. **Note:** To change the **Assignment group**, the **Assigned to** agent must be a member of the new group.	

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Field	Description	
	This field also determines when Virtual Agent or Connect Support is used for the Ask a question feature. ○ Agent Workspace: Virtual Agent ○ Users and groups: Connect Support	
Assigned to	The user assigned to work on this case. If the user is not auto-assigned, click the lookup icon to select a user who is a member of the selected assignment group. **Note:** To change the **Assigned to** HR agent, the agent must be a member of the **Assignment group**. You can also use this field to assign a task to the **Subject person** of the case. For example, if you want the **Subject person** to sign and return a document or make a task optional.	
Task support team	The point of contact within your company for questions. **Note:** To use, activate the Connect Service Portal Widgets (com.glide.connect.sp_widgets) plugin.	
	Users and groups	Select when you want specific users or groups assigned to the HR case or task to be the primary support for this HR task. You can select from fields on the HR case or task such as the Opened by, Opened for, and others or you can select from different groups. You can further filter by selecting specific skills.
	Connect	Selecting Connect indicates your company is using ServiceNow Connect messaging. After you select Queue, the Queue field appears below it. Select a chat queue you want to support the task you are creating. You can further filter by selecting specific skills. In previous releases, this field was labelled Queue. **Note:** The Connect support (com.glide.connect.support) plugin was deprecated. For more information, see Activate Connect Support.
	Agent Workspace	Supports Agent Workspace for chat. Selecting Agent Workspace indicates your company uses Virtual Agent conversations for chat. After you select Agent Workspace, the AWA Queue field appears below it. Select the Advanced Work Assignment chat queue you want to support the task you are creating.

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Field	Description
	You can further filter by selecting specific skills
Parent case users	Appears when **Users and groups** are selected from **Task support team**. Select fields like Opened by, Opened for, and others from the parent HR case that you want to support this HR task.
Groups	Appears when **Users and groups** are selected from **Task support team**. Select a group associated to the HR case or task to be the support for this HR task.
Queue	Appears when **Queue** is selected from **Task support team**. Select the chat queue you want this HR task to be routed to for questions or help. **Note:** What you select here must match the value in the **HR Queue** field on the Chat Setup form under Collaboration. If these values don't match, an error occurs.
Skills	The required skills of the person assigned to this category of HR case.
Watch list	The list of users who receive notifications regarding this case. Click the lock icon to add users. Click the **Add me** icon to include yourself.
Short description	Short descriptions populate from the HR task template selected and can be overwritten. Enter information that prompts the user about the task request. The short description appears on the HR Service Portal to the employee.
Description	A longer, detailed description of the case. Use the Rich Text Format (RTF) tools to format your text. Rich text formatting also appears for a case or task description on the Employee Service Center or service portal.
Additional comments (Customer visible)	Enter comments, updates, or information about the task that is visible to the **Subject person** on the case. **Note:** Translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.
Work notes	Enter notes about the case to correspond with other HR agents. These notes are not visible to the **Subject person**. **Note:** Translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.

4. You can:

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- Click **Save** from the **Content menu** to save the task and remain on the **Task** form.
- Click **Submit** to save the task and return to the **HR Case** form.
- Click **Ready for Work** to save the task and change the state to **Ready** and remain on the **Task** form.
- Click **View Responses** to view the feedback submitted by an employee via the form sent through the HR task of type **Collect Employee Input**.

5. Perform any of the following actions.

Action	Description
Assign to me	Click
Close a task	Enter information in the **Work notes** field and other fields as needed, and change the **State** to **Closed Complete**. **Note:** All HR tasks must be closed be fore the parent HR case can be closed.
Clone task	Click the **Clone Task** related link. Enter the new task information in the task form and click **Update**.
Cancel the task	Click **Cancel Task** in the form header.
Review the progress of sibling tasks	The **Sibling Tasks** tab shows all tasks under the same case. Click a task number to see the details.
HR Document Acknowledgement	Lists HR document acknowledgement types returned from an employee. You can filter by type: ○ User ○ Document revision ○ Signature ○ Updated

When all tasks are closed for an HR case, an email notification is sent to the HR agent who is assigned to the case.

Note: When you close the parent case, all child tasks are assigned the Closed Incomplete state.

6. Click the attachment icon at the top of the form, to add a document attachment Attachments to tasks are available on the parent case.
7. Click **Update**.

Create Office Space Request Task

As part of the onboarding process, you can find and reserve an office space for a new hire.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.case_writer

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Procedure

1. Select an HR Case.
2. Select **Add Task** under the Related Links section.
3. Select **HR Task** from the Task Type window.
4. Complete the form.
   These instructions describe the required fields for requesting an office space. For a complete listing of all HR task fields, refer to Adding an HR task to an HR case.

Location	Select the building location the new hire is as signed to.
Template	Select the HR task template that corresponds to this type of task. The **Select Office/Desk Space** template is provided as a model.
Due date	Select a date the HR task is to be completed.
HR Task Type	**Submit Catalog Item** appears from the HR task template.
Catalog Item	**Select Office Space** appears from the HR task template.
Short Description	Appears from the HR task template, but you can overwrite this entry.
Assignment group	Appears from the HR task template, but you can override it. If blank, select a group to be assigned to this task.
Assigned to	Appears from the HR task template, but you can override it. If blank, select an HR agent to be assigned to this task.

5. Select **Submit** or **Ready for Work**.

View HR task information

There are multiple ways to find a specific HR task.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Tasks**.
   - **Assigned to me:** All tasks assigned to the current user.
   - **Open:** All open tasks.
   - **Open - Unassigned:** All open tasks that have not been assigned.
   - **Closed:** All closed tasks.
   - **All:** All tasks regardless of state or assignment.
2. Select the task to view.

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Add adhoc approvers to a case

Provide your agents with the flexibility to add adhoc approvers to a case that is part of an HR service.

Before you begin

For example, in certain scenarios where in an employee's requests falls outside the bounds of the standard process or the agent needs to take an additional approval, an HR agent might need to request an adhoc approval before proceeding with its fulfillment.

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **HR Case Management** > **Assigned to me**.
2. Open a case that is in Ready or Work in progress state.
3. In the **Related links** list, click **Add an approval**.

Note:

- This option appears only to the Assigned to user, when the case is in Ready or Work in progress state.
- Administrator must have configured the **Agent Can Add An Approval** option on the HR service to which the HR case is associated.

4. Fill in the required fields in the **Add an approval** window.

Add approvers

Field	Description
Approver users	Users who must approve the request.
Wait for	Conditions that you want to set for the approval flow. ○ **Anyone to approve**: If any one of the approvers approves the request, the approval flow will be complete. ○ **Everyone to approve**: Only if all the approvers approve the request, the approval flow will be complete. ○ **First response from anyone**: The first response of any one approver is taken into consideration. For example, if one of the approvers first rejects the request, the flow will be rejected; if one of the approvers first approves the request, the flow will be approved.
On rejection	Conditions that you want to set when an approver rejects a request, for example, allow resubmission of approvals, or mark it as close incomplete.
Reason	Reason for initiating the approval flow.
Additional Comments	Any other information that you want to share with the approvers.

5. Click **Send for approval**.

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Resubmit an HR case for approval

HR cases that are rejected can be resubmitted for approval. Resubmitting a rejected case alleviates having to recreate a new case.

Before you begin

Role required: sn_hr_core.case_writer

After a new case is submitted, an email notification is sent to all approvers. Approvals for HR cases are assigned to individual users or to members of a specified group. Approvers can reject or approve from the HR Service Portal or HR Ticket Page.

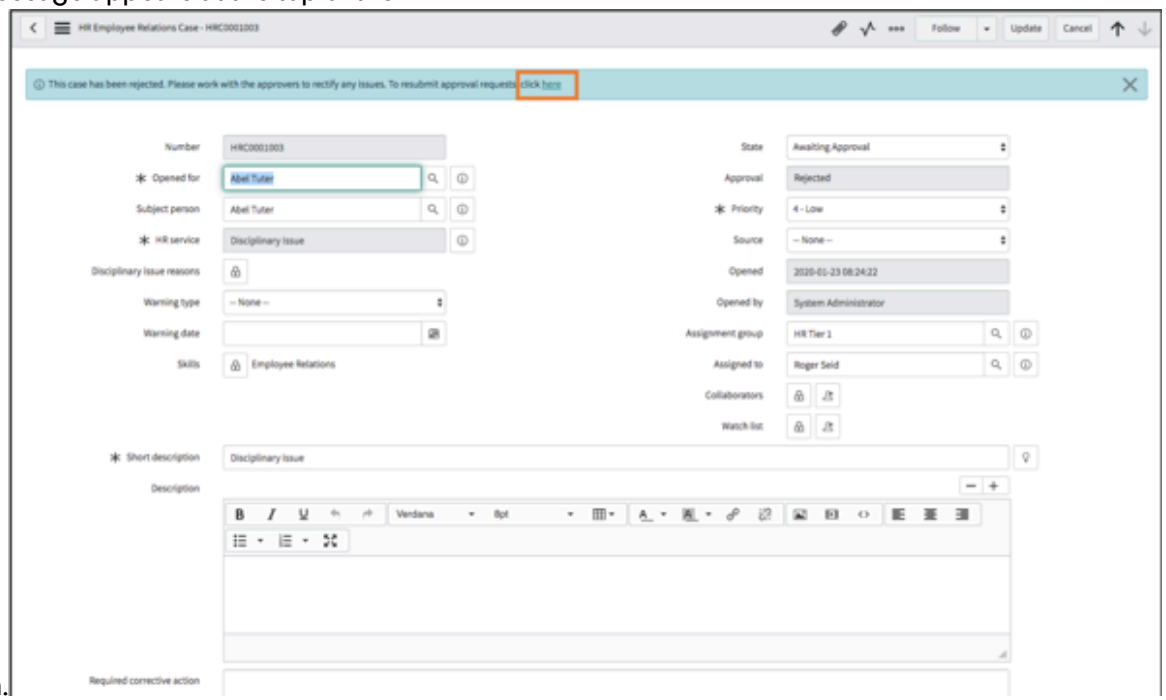
When a service activity for an HR service has **Allow resubmit of approvals** for **On rejection**, the Assigned to person can resubmit an approval request after rejection. See Configure an approval.

You can view a list of approvers at the bottom of the HR case form under the **Approvers** tab.

HR cases: Approvals for HR cases use workflows. Do the following to resubmit a rejected HR case.

Procedure

1. Open the HR case that has a rejected approval.
   A message appears at the top of the form.



2. Select the **here** link.

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The **Enter the reason for resubmitting approval requests** pop-up appears. You can enter work notes (not visible to employee) or comments (visible to employee). Work notes or comments are required.



3. Select **OK**.

Lifecycle Events cases:

Approvals for HR activities under a lifecycle event are configured differently than an HR case. There are more options for approvals. See For an approval.

Note: Approvers that do not have the sn_hr_core.manager role cannot access the HR case after the state changes to **Closed Complete**.

Transfer an HR case

You can create and use methods to reclassify or transfer an opened HR case from one HR service to another. Oftentimes an HR case opens as a General Benefits Inquiry. After investigating, you can transfer it to the applicable HR service.

You can configure different transfer case scenarios. There are two (2) methods you can use to transfer an HR case created with an HR service to another HR case with a different HR service.

The base system provides:

- Reclassify:
  - The HR case number does not change after transferring an HR case from one HR service to another.
  - Links redirect to the new case for the following users:
    - Opened for: Person that the HR request was opened for.
    - Subject person: Person that is the subject of the HR request.
  - Notification emails are not sent for reclassification cases.
- Standard:
  - The HR case number changes when transferring an HR case from one HR service to another. Both HR case numbers appear on the HR case for reference.
  - Links do not redirect from original case to new case.
  - The subject person receives a notification email with the closed case and transferred case information.
- Common to both Reclassify and Standard:
  - Fields from the current case are copied and moved to the new case.

Note: The sn_hr_core.transfer_case.ignored_fields sys property can be set with fields that are not copied in an HR case transfer.

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- Work notes copy from original case to new case.
- Attachments are copied and moved from the current case to the new case.
- Previous interaction records from the current case are copied and moved to the new case.

- Sys property:

  The sn_hr_core.reclassify_default_transfer sys property determines the default method to use after upgrade. For more information, see HR properties.

Configure HR transfer case

The base system provides examples of HR transfer case configuration types. You can also create your own.

Before you begin

Role required: sn_hr_core.admin

About this task

If you are creating a transfer case configuration, you must also create a script include to implement the sn_hr_core HR case transfer extension point. For more information, see Registering custom script includes against the scripted extension points.

Refer to the existing script includes as examples:

- hr_TransferCase
- ReclassifyCaseTransfer
- StandardCaseTransfer

The hr_TransferCase script include provides a list of fields ignored in the transfer and acts as a utility for the other two script includes.

Note: Refer to Script includes.

Procedure

1. Navigate to **All** > **HR Administration** > **Transfer Case Configuration**.
2. Select **New**.
3. Fill in the form.

HR Transfer Case Configuration

Field	Description
Name	The name of the HR case transfer type. The defaults are: ○ Reclassify ○ Standard
Display text	The HR case transfer type that appears on the Transfer Case menu from the HR case form. The defaults are: ○ Transfer with existing case number ○ Transfer to a new case number

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Field	Description
HR criteria	Defines what HR agents can view and use this transfer type when performing an HR case transfer from the HR case form. See HR criteria. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Is default	Indicates that the transfer type is the default and appears first in the Transfer Case menu from the HR case form. **Note:** To mark a transfer type as the default, click the **Set as Default** button at the bottom.
Active	Indicates if the HR case transfer type is active and available for use. Inactive indicates that the transfer type does not appear in the Transfer Case menu from the HR case form.

4. Select **Submit** or **Update**.

Move an HR case from one HR service to another

You can reclassify an HR case that you originally create under one HR service but want to move it under a different HR service.

Before you begin
Role required: sn_hr_core.case_writer

About this task
You can also retain the details of the original case. For example, you can take a General Inquiry case and reclassify it as a Medical Benefits Inquiry case.

Procedure

1. Open an existing HR case.
2. From **Additional actions**, select **Transfer Case**.
3. From **Transfer type**:
   - **Transfer with existing case number**: The HR case number does not change, links redirect with new case, and work notes transfer to new case.
   - **Transfer to a new case number**: The HR case number changes, links do not redirect, and work notes do not transfer. Both HR case numbers appear on the HR case for reference.
4. From **New HR Service**, select the HR service you want to assign to your original case.
5. Select **OK**.
   The current case and its child tasks close. When you transfer an HR case from one HR service to another, some field values do not transfer to the new case. The Opened for person receives a notification email with the closed case and transferred case information. Replies to the email appear in the Comments section of the HR case. If the subject person replies to the email

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associated with the closed case, the reply appears in the comments for both the closed and transferred cases.

Note: If the sn_hr_core.restrict_guest_email system property is False (default), text from an email appears in the Work notes field when the employee is responding from a personal email account.

See Email setup.

Escalate an HR case

Escalate an HR case when you cannot resolve it yourself. The system reassigns the case according to your organization's escalation rules and marks it as high priority.

Before you begin
Role required: sn_hr_core.basic or sn_hr_core.case_writer

About this task
Escalate an HR case when you encounter any of these situations:

- You cannot complete the task due to workload constraints
- You lack the necessary skills or expertise
- You need assistance from a senior team member
- The case requires management approval or intervention

The escalated case is reassigned based on escalation rules configured for your organization. For information about configuring these rules, see Configure escalation rules for HR cases.

Procedure

1. Navigate to the HR case you want to escalate.
2. In the Related Links section, select **Escalate case**.
3. In the escalation dialog, enter a clear reason for the escalation.
   Provide specific details about why you cannot resolve the case. This information helps the assigned person understand the situation and take appropriate action.
4. Select **OK**.
   The system reassigns the case according to your escalation rules and updates the priority to high.

Result
The escalated case appears in the assignee's work queue with high priority status. The case history records the escalation action and reason.

Suspend and resume an HR case

If you are unable to close the HR case within the duration specified in the service level agreement (SLA), you can suspend the case.

Before you begin
Role required: sn_hr_core.basic or sn_hr_core.case_writer

About this task
For example, to contact a vendor, such as the insurance administrator or payroll processing company, to obtain the required information to close the case. After beginning work on the case, you can suspend it until the information is received. This way the HR case does not show that the

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SLA is breached. When the information is received, you enter it into the case and resume SLA tracking.

Procedure

1. Open the HR case to suspend.
   Begin work on the case before suspending it.
2. From the **State** field, click and select **Suspended**.
   The **Suspend Reason** pop-up window opens.
3. Select one of the following suspension reasons and enter the information you are waiting for.
   - **User**: If you need more information from the employee before proceeding.
   - **Company**: If you are waiting for a reply from a vendor or other outside company.
   - **Group**: If you are waiting for a reply from an internal group.
   - **Other**: If you suspend the case for any other reason.

   Example
   For example, if you are waiting for the health insurance administrator to investigate an employee claim, select **Company** for the reason and enter `Results of investigation` or something similar.
4. In the **Work Note** field, enter information about why the case is suspended.

   Note: Translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.
5. Click **Suspend**.
   The SLA stops progressing and the suspension notes appear in the activity stream as work notes. You can continue to add work notes to a suspended case.
6. To resume a suspended HR case, open the case and click **Resume**.
   The SLA progress is resumed.

Add special handling notes for an HR Service Delivery case

Create special handling notes that appear for a specific HR case or set of conditions.

Before you begin
Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **Special Handling Notes** > **Special Handling Notes**.
2. Select **New** or an existing record.
3. Fill in the fields.

Special Handling Notes

Field	Description
Short description	Enter a short description that describes the special handling note.
Message	Enter a message that appears in the special handling notes. Rich text formatting is available.

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Field	Description
Type	Select the type of special handling note: ○ Standard: Select to display a special handling note for a specific table and related record. For example, if you select HR case, you can select from list of HR cases. A special handling note appears for a specific HR case already created. ○ Conditional: Select to use filter conditions. Use filter conditions to specify when a special handling note appears.
Display as a pop-up alert	Leave this field blank. **Note:** Currently, a pop-up window is only for HR Service Delivery Agent Workspace.
Priority	Assign a priority to the special handling note. The choices are: ○ 1 - Critical (red) ○ 2 - High (orange) ○ 3 - Moderate (light green) ○ 4 - Low (light blue) The priority and color appear in the special handling note.
Status	The status of the special handling note. ○ Active: The special handling note is active. ▪ Active notes appear in the pop-up window. ▪ Active notes remain until dismissed or set to Inactive or Expired. ○ Inactive: The special handling note is no longer active and does not appear in a pop-up window. Inactive special handling notes still appear when you navigate to **Special Handling Notes** > **Special Handling Notes**. ○ Expired: The special handling note is no longer active. The expiration date has passed or manually expired.
Effective immediately	Check to activate the special handling note immediately. If you leave this field unchecked, you can specify a date and time the special handling note appears.
Effective on	Appears when you leave the Effective immediately field unchecked.

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Field	Description
	Select a date and time when the special handling note appears.
Expires on	If you want to automatically inactivate a special handling note, select a date and time.
Table name	Appears when you select Conditional from the Type field. Select the HR table the special handling note appears for when a specific HR case appears or when you satisfy filter conditions. **Note:** Special handling notes do not support child tables. For example, if you select the HR case [sn_hr_core_case], the special handling note only appears for cases specific to the table. To create a special handling note for child tables, you must create a special handling note for each table.
Related record	Appears when you select Standard from the **Type** field. Select and a pop-up menu appears. Select the table name and a corresponding case from the Document field. For example, select HR case from the Table name field and the HR case you want the special handling note to appear.
Conditions	Appears when you select Conditional from the **Type** field. Select conditions when met, show the special handling note. For example, select: ○ HR profile ○ is ○ Aileen Mottern This condition shows the special handling note for a General Inquiry case for Aileen Mottern. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

4. Select **Submit** or **Update**.

HR cases for VIPs

Your organization can assign VIP status to users, such as the CEO and vice-presidents, to ensure that the resolution of their tasks is given high priority.

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If your organization uses the VIP feature, set up the following to ensure that VIP HR cases are handled appropriately.

- Navigate to **Skills** > **Groups**.
- Add members or a group to **HR VIP Watchlist**. When an HR case is submitted, members of this group receive notification as the case progresses.
- Review the HR service level agreement (SLA) for handling VIP cases. The duration is two hours. When the duration is reached, the SLA is breached and the members of the watchlist are notified.
- Navigate to **HR Administration** > **Properties**.
- Enter a case priority number in the **Default case priority for VIP requestor** field.
- For VIP employees, check the **VIP** box on their User [sys_user] record.

> **Note:** The VIP check box does not show by default. Customize the User record form in the Form Designer to show the VIP check box.

You can identify VIP HR cases in the following ways:

- **HR Cases** list: A VIP icon appears in the **Opened for** and/or **Subject person** fields. If the **Opened for** and/or **Subject person** fields do not appear, personalize the list.
- **HR Case** form: The employee name in the **Opened for** and/or **Subject person** fields is red.
- HR catalog items: When the form is submitted, a message appears at the top identifying the submitter as a VIP.

Creating bulk cases

You can create the same type of HR case, for multiple employees, without having to create the same case multiple times. Segments for a bulk case help you define specific values for groups of employees.

Bulk case creation can save you time and effort. For example, onboarding 20 new hires, a payroll run issue, or an annual recertification process, are cases that can be created as a bulk case.

Bulk HR cases can be created for all active users. For users without an HR profile, like new hires, an HR profile is automatically created.

You can create one bulk case that creates individual HR cases for each employee in a group. Examples include:

- Sending an annual recertification task to a group of employees every year.
- Onboarding multiple new hires.
- Managing a payroll issue that affects multiple employees.

Bulk case process

Perform the following steps to create a number of similar cases using bulk case request:

- Create and save a bulk case request.

  A bulk case request starts the process and contains basic information about the types of cases you are creating.

  > **Note:** You must create and associate at least one user segment group to a bulk case request.

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- Create one or multiple user segment groups.
  - User segment groups allow you to specify values for a group of users. You can create multiple segments for a bulk case request that defines different values for different groups of users.
  - User segment groups allow admins to ensure their bulk case creation is correct before executing.
  - After creating a user segment group, you can see the number and the users the bulk case request has targeted. You can also remove specific users.
- If your user segment groups look accurate, you can create cases.

Number of cases and performance

HR bulk case creation is designed to create up to 10,000 basic HR cases, or 1,000 cases using workflows such as Lifecycle Event cases.

Note: Performance declines when attempting to create more bulk cases than the system is designed to handle.

Bulk cases from previous releases

You must complete or close all existing bulk case requests from previous release versions. Incomplete bulk case requests in previous release versions cannot be completed in Rome.

When opening completed bulk case requests from a previous release version, some fields are not editable and segments do not appear.

Bulk cases queued and asynchronously updated

The request to process bulk cases are queued and asynchronously updated in the background.

Note: In previous releases, the **Bulk case creation** scheduled job processed bulk case requests. This scheduled job is now deprecated.

HR admin (sn_hr_core.admin) and bulk case creation

Previously, the HR case writer (sn_hr_core.case_writer) role was required. Because bulk case creation involves a large number of cases, it was decided to change the required role to HR admin (sn_hr_core.admin).

If you want employees with the HR case writer (sn_hr_core.case_writer) role to create bulk cases, you can update the Access Control List (ACL) for the following table:

Bulk Case Request (sn_hr_core_bulk_case_request).

To allow user segment groups under the request, update the ACLs for:

- Bulk Case User Segment (sn_hr_core_bulk_case_user_segment)
- Bulk Case User Segment Group (sn_hr_core_bulk_case_user_segment_group)

For more information on ACLs, see Access control list rules.

Create a bulk case request

Use bulk case request to create the same type of HR case, for multiple employees, without having to create the same case multiple times.

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Before you begin

Role required: sn_hr_core.admin

Note: Previously, the HR case writer (sn_hr_core.case_writer) role was required. Because bulk case creation involves a large number of cases, it was decided to change the required role to HR admin (sn_hr_core.admin).

Procedure

1. Navigate to **All** > **HR Case Management** > **Bulk Case Requests**.
2. Select **New**.
   On the form, fill in the fields.

Bulk case form fields

Field	Description
Name	The name that describes the bulk case request.
HR service	The HR service associated with the bulk case request. **Note:** When you create a user segment group, the fields from the HR service you select can appear similar to creating a new HR case. For more information, see Create a user segment group.
Status	The status of the bulk case request. The default is **Draft** and changes to **Ready** after you create and save the **User segment groups** tab. **Note:** At least one user must be included. The status changes to **In progress** after you select the **Create cases** button.
Create parent case	Indicates you want to create a parent case that is associated with the bulk cases. Check the **Create parent case** choice to create a parent case.
Opened by	The name of the user creating the bulk case request.
Selected user count	Shows the number of users selected for the bulk case request. **Note:** This field is empty until you create and save a user group segment.
Requested time	Shows the date and time your bulk case request was submitted to create cases.

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Field	Description
	Note: This field is empty until you create a user group segment and select **Create cases**.

3. Select **Save**.
   The **User segment groups** and **Cases created** tabs appear.
4. Select **New** in the **User segment groups** tab.
   For more information, see Create a user segment group.

Create a user segment group

User segment groups allow you to specify values for a group of users, or with multiple segments specify different values for different groups of users. Segments allows you to ensure that your bulk case creation is correct before executing.

Before you begin
Role required: admin

About this task
After you create a bulk case request, you create a user segment to define the users a case will be created for.

Note: You can have multiple user segments associated with a bulk case request.

Procedure
1. From the **User segment groups** tab on the **Bulk Case Request** form, select **New**.
2. On the form, fill in the fields.

Note: The **Label**, **Opened for**, and **Filter by** fields

Create user segment

Field	Description
Label	The label that describes the user segment. **Note:** When cases are created, the short description from the HR Case Template appears. The label describes the segment.
Opened for	The employee you choose as the **Opened for** person on each case. For example, you can select the hiring manager for an onboarding bulk case request.
Work notes	Information that provides further details about the user segment.
Additional fields	Depending on the HR service selected when creating a bulk case request, additional fields may appear. For example, if **Tuition Reimbursement Request** was entered in the

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Field	Description
	HR service field on the Bulk Case Request form, the following fields appear: ○ School or Program name ○ Course title ○ Course justification ○ Course start date ○ Course end date ○ Course cost For more information on what fields appear, see Configure the HR case creation form for an HR service. The base system only provides additional fields for the Tuition Reimbursement Inquiry and Tuition Reimbursement Request HR services.
Filter by	Determines who to create the bulk HR case for: ○ Upload file: ▪ Upload a file with user names or email addresses. Select **Download Template** for a pre-formatted Excel spreadsheet. **Note:** The header of the first column must contain user_name or email. ▪ Check the **user_name template** to indicate you're uploading a file with user names. ▪ Check email template to Indicate you're uploading a file with email addresses. ▪ Select **Choose File** to find and select the file you're uploading. ▪ Select the **Upload** button after you choose a file. ▪ After uploading the file, the number of users appears. This number represents the number of users that fulfill your criteria. ○ HR criteria: Use pre-defined HR criteria. Criteria based on conditions defined by the **HR Profile [sn_hr_core_profile]** or **User [sys_user]** tables. The base system provides examples that you can select from the **Select HR Criteria** list.

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Field	Description
	Note: Only available to users with the sn_hr_core.content_reader, sn_hr_core.content_writer, or sn_hr_core.admin roles. ○ User criteria: Criteria based on role, department, group, location, or company. User criteria is a platform feature. See User criteria for Service Portal . **Note:** Only available to users with the sn_hr_core.content_reader, sn_hr_core.content_writer, or sn_hr_core.admin roles. ○ HR profiles: Use conditions based on the **HR profile [sn_hr_core_profile]** table with conditions that you choose. ○ Users: Use conditions defined by the **User [sys_user]** table with conditions that you choose. After selecting a filter, the number of matching users appears in green as a link. Click the link to view all users selected based on the filter. For the **HR Profile** and **Users** filter, you can refine the selection. Right-click on a column, select **Filter Out** or **Show Matching**. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global .

3. Select **Save**.
   The **Bulk Case Request** form returns with the user segment group you created. If your user group segment has many cases, the status for the segment is **Processing**.

   Note: You can still review and edit your user segment group. For more information, see Manage a user group segment.

4. When the status is **Processed**, the **Create cases** button appears at the top right and above the related list tabs.
5. Select the **Create cases** button.
   Your request is queued and asynchronously updated in the background.

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Note: After selecting the **Create cases** button, all users with a status of **Included** are rechecked against the filter criteria used. Cases aren't created for users that no longer match the filter criteria. Cases are also not created for users that match the criteria after the user segment was created.

6. Select the **Cases created** tab to view a list of cases created.

Manage a user group segment

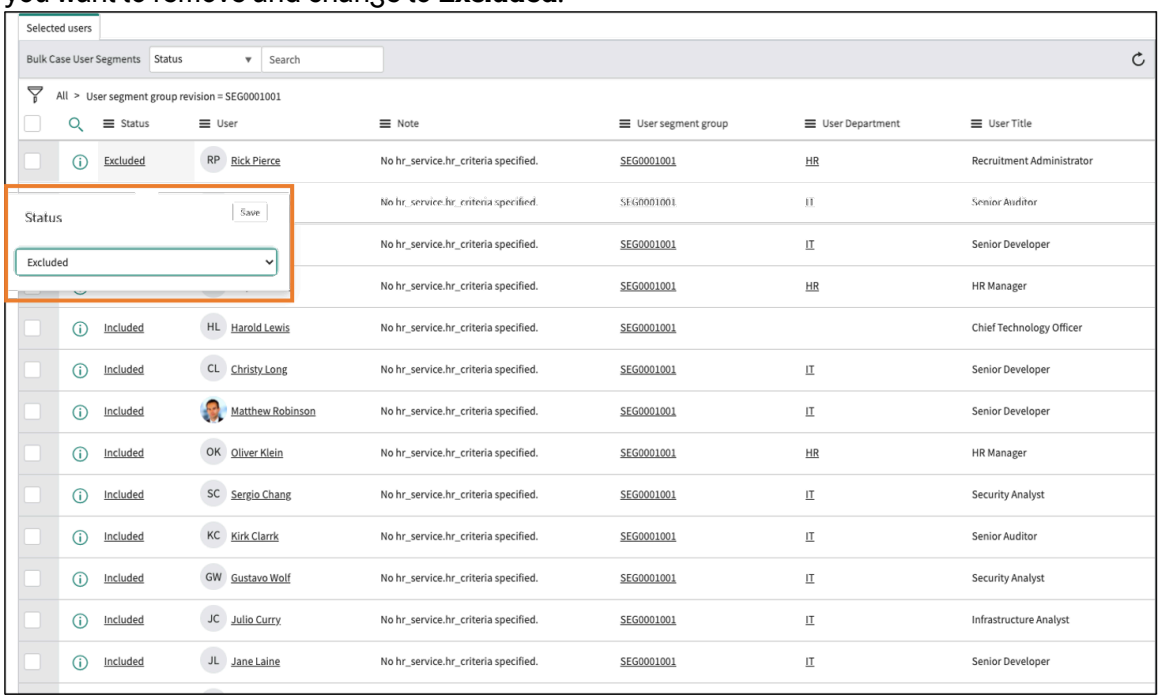
After creating a user group segment, you can review and edit it before you create cases.

Before you begin

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Case Management** > **Bulk Case Requests**.
2. Select any bulk case request that has a status of **Ready**.
   You can also edit a user group segment immediately after creating one.
3. Select the user segment group you want to edit found under the **User segment groups** tab.
   The **User segment details** form appears.
4. Scroll down to the **Selected users** tab.
5. To remove a user from the user segment group, double-click in the **Status** column for the user you want to remove and change to **Excluded**.



The meaning for each status:

- Included: User matches criteria defined in **User Segments**, create a case for the user.
- Excluded: User no longer matches the criteria defined in **User Segments**, do not create a case.
- Duplicate: The user has a duplicate record, do not create a case.

The **Note** column provides information on the status. The definitions are:

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- No hr_service.hr_criteria specified: HR criteria was not used in selecting the user for the user group segment.
- User satisfies hr_service.hr_criteria: HR criteria was used in selecting the user for the user group segment.
- User do not satisfy hr_service.hr_criteria: The user did not meet the HR criteria selected and is excluded from the user group segment.
- User from user-segment-group<group-label> with sys_id<unique-id> is included: The user is marked as a duplicate.

Note: The note clears after you change the status of a user.

6. After changing a user's status, select **Save**.

HR Profile

The HR Profile application stores confidential employee data, such as name, personal contact information, email addresses, employment history, and contacts, in the scoped version of HR.

HR Profile enables the organization to access and track employee information throughout the period of employment and beyond. HR profile records are associated with user records, but unlike user records, HR profile records are stored confidentially and are not publicly viewable.

Organizations can use an integration method to populate or synchronize HR profile records from their employee database.

The fields that are editable by employees are defined in **HR Properties** under **HR profile fields editable by users**. See HR properties.

HR profile editable field configuration

An option in Human Resources Configuration provides a list of HR profile fields that can be enabled for edit. Understand the difference between how the personal and the employment information fields are updated in the HR profile based on this configuration.

Typically, organizations allow employees to update certain personal information, but not sensitive and employment information. HR agents or managers change this information. For example, employees can change their home address and personal email address, but the manager must update the position when the employee is promoted.

Note: Use the configurable allow list to add fields that users can modify themselves. This allow list is a system property and accessed by going to **All** > **HR Administration** > **Properties**. The list of user editable fields appears as comma separated list. The property name is **sn_hr_core.hr_profile_editable_fields**.

For more information about adding or modifying HR profiles, see Add or modify an HR profile

The **HR profile fields that users or managers can edit without HR approval include <number of fields>** option in Human Resources Configuration provides the list of editable HR profile fields. The following list of fields indicates which of the configurable fields contain personal and which contain sensitive and employment information.

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Configurable fields

Personal information fields	Sensitive and employment information fields
• Home address • Home city • Home country • Home phone • Home state/province • Home zip/postal • Middle name • Personal email • Personal mobile phone • Prefix • Work email • Work mobile • Work phone	• Date of birth • Department • Employee number • Employment end date • Employment start date • Employment type • Ethnicity • First name • Gender • Last name • Location • Location type • Manager • Nationality • Notice period • Place of birth • Position • Probation end date • Probation period • Time type

In the configuration option field list, all the personal information fields are enabled for edit by default. All employees can open their HR profile from the HRSM Portal and update these fields. If you do not want to allow employees to update one or more of these fields, disable editing by clearing the check box in the configurable list. For example, you do not want employees updating their work email address or phone number.

ACLs control the HR profile personal information fields, which can be modified for more controlled access.

You must have the **sn_hr_core.secure_info_reader** role to view the Social Security field on an HR profile. This role is contained in the **sn_hr_core.manager** role.

The employment information fields that you enable for edit allows a manager to update the field. However, the manager cannot open an employee HR profile. The manager must submit an employee information change request with the updated information. When the request to change the editable fields is submitted, the HR Employee Change Workflow takes the following actions.

- Opens an HR case.
- Updates the employee HR profile.
- Closes the HR case.

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To update any HR profile fields that are not editable, employees or their managers submit an employee information change request. An HR case is created and the HR Employee Change Workflow is started. The workflow requires that the change request is approved. When it is approved, the fields are updated and the HR case is closed.

At a Glance panel in Agent Workspace for HR Service Delivery

The fields that appear on the **At a Glance** panel in Agent Workspace for HR Service Delivery are dependent on what fields appear in an HR profile.

Note: Fields with no data on the HR profile do not appear in the **At a Glance** panel.

If you want additional fields to appear on the **At a Glance** panel, see Configuring the form layout.

Related topics

HR Profile

HR profile and HR case security

Because HR profile information is sensitive and confidential, the System Administrator [admin] cannot view it. The same is true for some of the information in HR cases and HR tasks.

HR profile information is confidential and viewed only by authorized HR personnel who are assigned a role that includes sn_hr_core.profile_reader or sn_hr_core.profile_writer, such as sn_hr_core.secure_info_reader.

For HR cases and HR tasks, only authorized HR personnel are allowed to view attachments, work notes and comments, description, calendar, and payload (configurable). Authorized HR personnel are assigned a role with sn_hr_core.case_reader and sn_hr_core.case_writer, such as sn_hr_core.secure_info_reader.

HR administrators [sn_hr_core.admin] will be able to perform all tasks and view all data.

HR profile information that system administrators can access

System Administrators cannot create an HR profile. They can see the list of HR profiles and open HR profile records, but only have access to the following information.

- The HR profile number and prefix of an employee.
- Employment information that is synchronized with the user record [sys_user]. This information includes name, employee number, department, manager, and location.
- Work contact information, such as work email address and work phone number. Personal information is hidden.
- Information that appears in the following related lists.
  - Employment Information
  - Contact Information
  - Beneficiaries
  - Who is Covered
  - Emergency Contacts
  - Direct Reports
  - Colleagues
  - Cases

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HR case and task information accessible by HR Administrators

HR Administrators can view the employee user information, such as location and department, and the short description. Activities, such as state changes, are displayed in the activity stream, but comments and work notes are hidden. System Administrators cannot view this information.

When the HR Administrator opens an HR case or HR task, a message describes the information that is not displayed.

An HR case can be created from an HR profile. Click **Create New Case** under **Related Links** and **Case Creation** appears.

Impersonating a user

You can prevent a user from accessing HR information by impersonating a user that has HR access by using the **If true, ACLs check if the user is being impersonated.** property.

- Navigate to **HR Administration** > **Properties**.
- Scroll to **If true, ACLs check if the user is being impersonated.**
- Check **Yes** (true) to enable ACLs to check when a user is impersonating another user and prevent the user from viewing HR information.

  COE security policies are a way to easily restrict access to different COEs via configuration. The underlying COE security policy implementations are ServiceNow ACLs.

- Even if the logged in user has HR access and impersonates another HR user with the same access, HR information is not visible.

  Note: This property was introduced for the HR Service Delivery scoped application and not applicable to the HR Services Delivery Non-scoped application.

See Add field security in HR.

See Restricted caller access for HR.

See Manage HR roles.

Customized profile information

As part of designing the HR processes, you can customize the way HR profile information is processed. Keep in mind that some of the fields that appear are referenced from the User [sys_user] table.

If you have the sn_hr_core.admin role, you can customize HR profile information.

Extend profile information

You can collect more profile information in a separate table. For example, you can create a Dependents table that extends the HR Profile [hr_profile] table.

Because profile information is sensitive and confidential, the system administrator cannot view it. For more information, see HR profile and HR case security.

Associate profiles with user records

An HR profile record must be associated with the employee record in the User [sys_user] table, to ensure that both employee records can be accessed conveniently. During the creation of an HR profile record, you can select the user record to associate with the profile.

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Certain fields are displayed in both the user and HR profile records, but they are in only one of the tables, User [sys_user] or HR Profile [hr_profile]. The following fields are in the User [sys_user] table.

- Prefix [introduction]
- First name [first_name]
- Middle name [middle_name]
- Last name [last_name]
- Manager [manager]
- Department [department]
- Location [location]
- Employee number [employee_number]

Note: Bot phone number sync is not supported.

The following table describes the other fields that are synchronized by the *Synchronize fields to hr_profile* business rule.

Fields synchronized using the business rule

HR profile [hr_profile] field	User [sys_user] field	Notes
Position [position]	Title [title]	Position in the HR profile is a referenced field. The HR profile could not be updated message appears: • When the title is updated in the User form • A position record with the same value does not exist
Home address [address]	Street [street]	
Country [country]	Country code [country]	Although the field names are the same, these fields are of different types. In the HR profile, [country] is a reference field. In the user record, [country] is a choice list. The country code appears in the User form instead of the country name when the country selected in the HR profile is not in the choice list.
Work email [work_email]	Email [email]	The HR profile contains both personal and work email fields, while the user record only contains the work email.

Note: The User form must be configured to show address, country, and email fields.

Add field security in HR

You can secure a field on a form so that specific HR users cannot view it.

Before you begin

Role required: sn_hr_core.admin, security_admin

About this task

Use **Access Control** (ACL) on a field to secure it.

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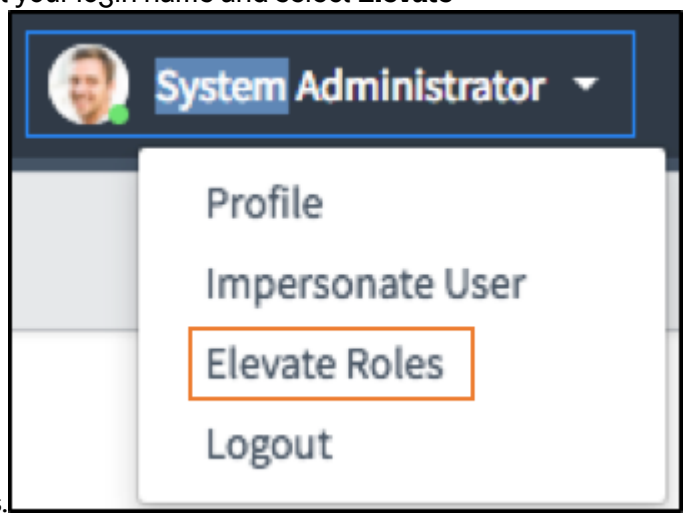
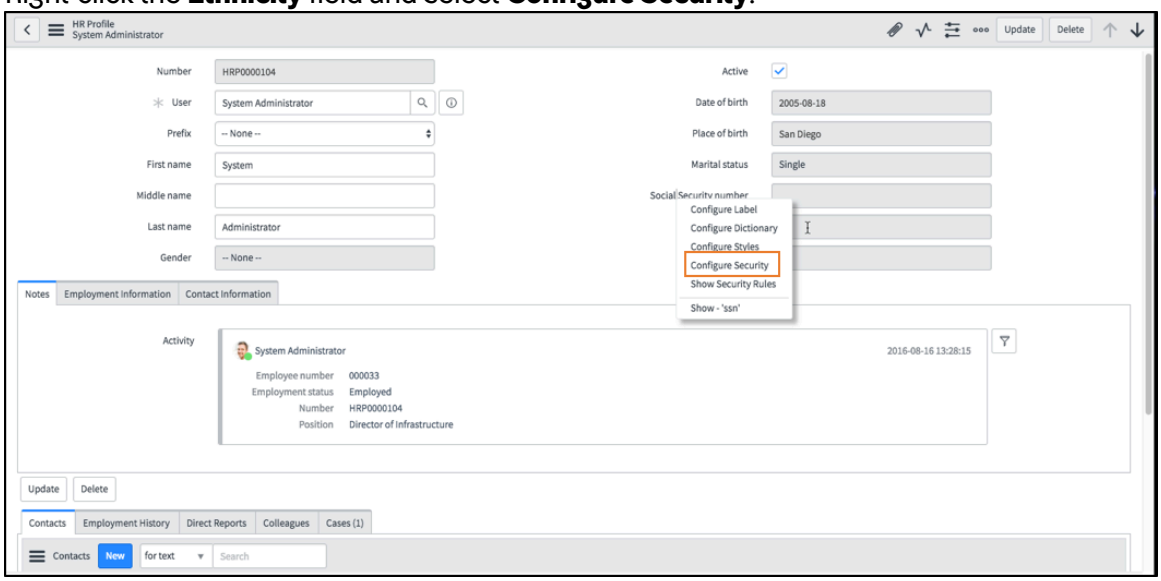
Note: This example shows how to secure the **Ethnicity** field on an **HR Profile** form so users with the HR Manager [hr_manager] role or below cannot view it.

Procedure

1. Navigate to **All** > **HR Profile**.
2. Elevate your role to add **security_admin**.
   Select your login name and select **Elevate Roles**.



3. Check **security_admin**.
4. Select **OK**.
5. Select an HR profile record to edit.
   It can be any record.
6. Right-click the **Ethnicity** field and select **Configure Security**.



7. The **Security Mechanic** menu appears.

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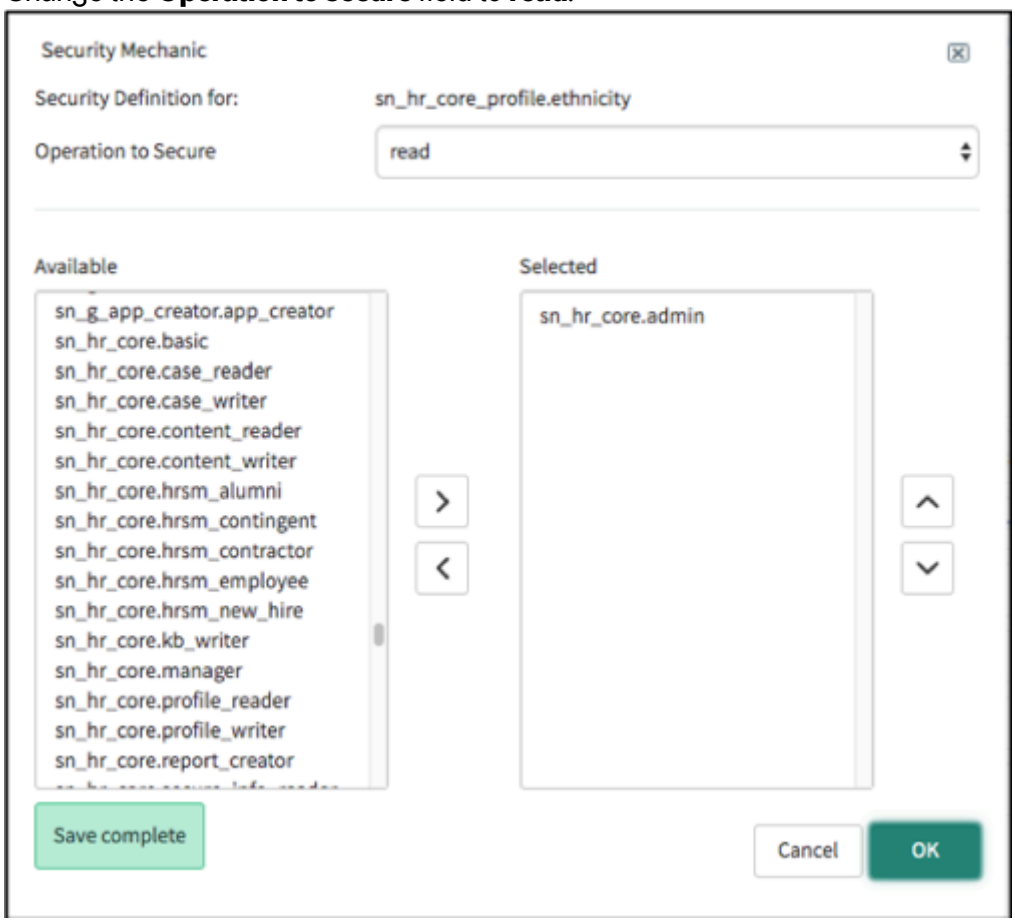
Change the **Operation to secure** field to **read**.



8. Move a role that you want to view the field to the **Selected** column.
   For example, move **sn_hr_core.admin**. By selecting **read** and adding **sn_hr_core.admin**, any role below this role, cannot read the field. For example, **sn_hr_core.manager** is below this role and cannot view this field after completing the steps.
9. Click **OK**.
   Because HRSM is a scoped application, you have to ensure that you are in the scoped version within the form.
   - Click the Settings icon.
   - Select **Developer** under **System Settings**.

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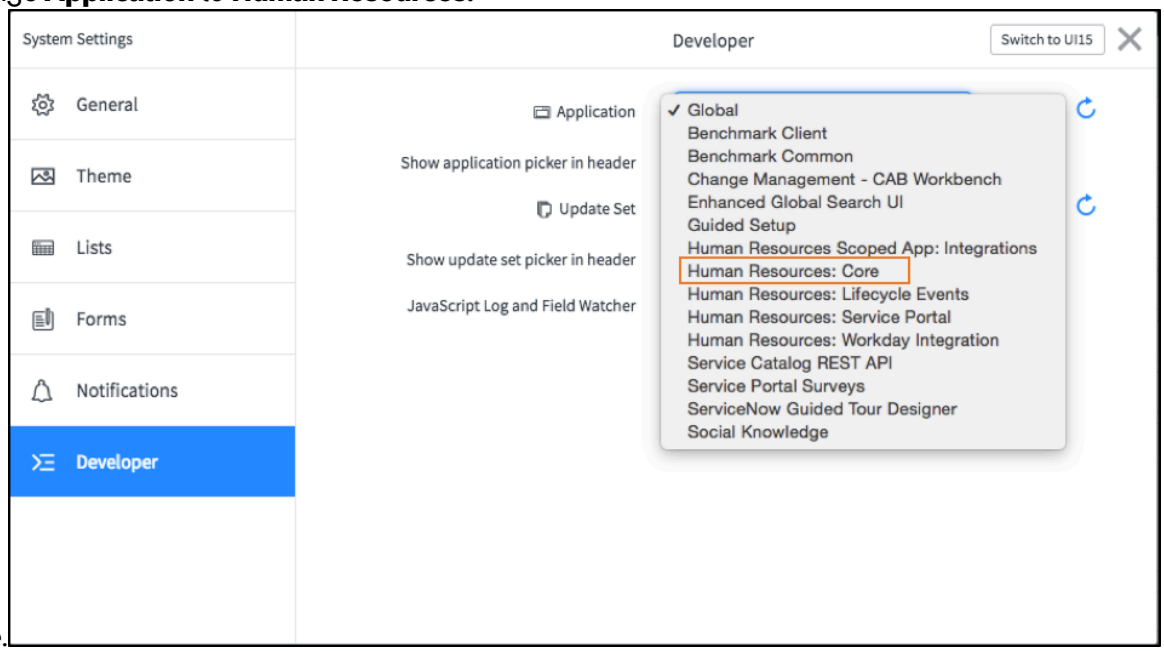
- Change **Application** to **Human Resources: Core**.



- Close the window.

Related topics

Access control list rules

HR profile encrypted tax identification fields

HR Service Delivery provides different choices for capturing your employee's tax identification number.

Previously, the **Social Security Number** field could be used to capture your employee's tax ID number, but was not encrypted.

The unencrypted **Social Security Number** is still available for use, but an encrypted field is available for use that provides additional security to sensitive information.

The encrypted **National tax ID (encrypted)** field uses the Password2 (2-way encrypted) Key Management Framework (KMF) encryption.

You can further define the encrypted **National tax ID (encrypted)** field by associating a type:

- ITIN: Individual Taxpayer Identification Number
- SSN: Social Security Number
- TIN: Taxpayer Identification Number

And you can provide additional details by associating the country.

Note: For more information on how to add the tax identification number for an employee, see Add or modify an HR profile.

Generate HR Profiles

For new customers using HR Service Delivery, you can create an HR profile for multiple employees using conditions and criteria.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.manager

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Procedure

1. Navigate to **All** > **HR Profile** > **Generate HR Profiles**.
2. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

HR profiles form

Field	Description
Filter Users	Click and select the conditions that must be met for an employee to be assigned the profile.
Profiles	Click and select the type of profile for employees that meet the conditions.

3. Click **Create Profiles**.

Note:

In the HR profile table when the External flag in the Employee App Access Criteria record is set to False; it indicates that the HR profile belongs to a local user.

In the HR profile table when the External flag in the Employee App Access Criteria record is set to True; it indicates that the HR profile belongs to a remote user.

Users are not charged for licensing when their HR profiles are created with External flag = True, or when their existing HR profiles are overridden with External flag = True.

Add or modify an HR profile

Employees can directly edit some information in their HR profile, such as emergency contact information, but they are restricted from editing certain fields. If employees want to change information that they are restricted from editing, they must submit a general request to HR for the changes.

Before you begin

Role required: sn_hr_core.secure_info_writer, sn_hr_core.basic, or sn_hr_core.manager

About this task

The HR Administrator [sn_hr_core.admin] can configure which HR profile fields an employee can update. An update to information that the employee cannot change requires an HR employee information change request.

Note: Use the configurable allow list to add fields that users can modify themselves. This allow list is a system property and accessed by going to **All** > **HR Administration** > **Properties**. The list of user editable fields appears as comma separated list. The property name is **sn_hr_core.hr_profile_editable_fields**.

To update the HR profile when an employee information change request is assigned to you, complete the following steps.

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
   The HR Profiles list opens.
2. Find the existing HR profile to update by selecting **User** from the HR Profiles list search menu, typing the name, and pressing Enter.

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Also, you can click a profile number to open a user profile.

From **HR Profiles**, select **New** and type the user name in the **User** field on the HR Profile New record form to create the profile. You cannot change the user name after an HR profile is saved.

3. Click the profile number to open the user profile.
   The profile opens displaying populated name, manager, department, location, and contact fields from the user record.
4. Complete or update the form with as much additional information as you have.

HR profile sections and related lists

Section or related list	Description
Number	The auto-assigned profile ID number, which cannot be changed.
User	The user associated with the profile. Click the **Lookup using list** icon and **New** to create a user.
Prefix	Click and select the personal title of the user.
First name	First name of the user, pulled from the user record.
Middle name	Middle name of the user, pulled from the user record.
Last name	Last name of the user, pulled from the user record.
Gender	Select the gender of the user.
Active	Check to indicate that the user is a current employee for your company.
Legal hold	Indicates that the HR profile is under legal hold and all associated employee documents cannot be deleted. ○ Click the **Add Legal Hold** button in the form header. ○ Select a **Reason**. ○ Enter comments. ○ Click OK. To remove an HR profile from legal hold, click the **Remove Legal Hold** button in the form header.
Date of birth	Click the **Select Date** icon and select the birth date of the user.
Place of birth	Enter the location the user was born.
Country of birth	Select the country the user was born.
Marital status	Select the marital status of the user.
Nationality	Enter the nationality or nation in which the user is a citizen.
Ethnicity	Enter the ethnic group the user identifies with.
Ready to return to workplace	Identifies if the employee is ready to return to work. Works with Enterprise Employee Experience Packs for employees working from home during a health crisis. Select **Yes** and the employee is included in campaigns and lifecycle events related to returning to work.

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Section or related list	Description
	Select **I'm not sure** and the employee is included in some of the lifecycle events related to returning to work. An HR task triggers for HR to review the employee's concerns. For more information, see Enterprise Employee Experience Pack.
Return to workplace date	Works with the **Ready to return to workplace** field. Select a date when the employee plans to return to work.
Employment Information	Information such as employment status and type of employment, employee number, and start and end dates.
Employment start date	For onboarding employees, click the **Select Date** icon and select the first day of employment.
Employment end date	For offboarding employees, click the **Select Date** icon and select the last day of employment.
Employment type	Select the employment type for the user.
Probation period	Enter the period the user is on probation.
Probation end date	Enter the date probation ends for the user.
Leave status	The status of the employee if leave was requested. Values are: ○ Requested ○ Approved ○ On Leave ○ Rejected ○ Completed ○ Cancelled
Position	Click and select the job title for the user.
Department	Select the department the user belongs to.
Manager	Select the manager the user reports to.
Location	Select the office location of the user.
Location type	Select the location type of the user to further define the location.
Offboard type	For employees offboarding, click, and select the type of employment termination.
Notice period	For companies that require notice before dismissing an employee. Enter the time period between receipt of the letter of dismissal and the end of the last working day.
Employee number	Enter the employee number of the user.

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Section or related list	Description
Social Security number	Enter the social security number of the user. **Note:** This field is not encrypted for security. For security purposes, it is recommended to use the **National tax ID (encrypted)**, **National tax ID type**, and National tax ID country fields. For more information, see HR profile encrypted tax identification fields.
National tax ID (encrypted)	The national tax identification number of the employee. **Note:** This field uses the Password2 (2-way encrypted) Key Management Framework (KMF) encryption.
National tax ID type	The type of national tax identification associated with your employee. The different types are: ○ ITIN: Individual Taxpayer Identification Number ○ SSN: Social Security Number ○ TIN: Taxpayer Identification Number
National tax ID country	The country associated with the national tax identification number of the employee. You can enter the country name or select the Suggestion icon ( ) to view a list of countries.
Contact Information	Information such as address, phone number, personal email address. Some field values are copied from the onboarding form.
The following related links are available:	
Create new case	Click to create an HR case for the HR profile displayed.
Show employee org chart	Click to view the organization chart of the employee.
View Manager Profile	Click to view the HR profile of the manager of the employee.
The following related lists are automatically populated.	
Beneficiaries	A list of beneficiaries associated with the employee. Click **New** to create a beneficiary.
Who is covered	A list of people who are covered under the benefits for the employee.
Emergency Contacts	A list of the employee emergency contacts. One contact in the list is designated as the primary and others can be entered as alternates.
Employee Documents	Lists all HR employee documents associated with the HR profile.

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Section or related list	Description
	Note: This tab only appears when the **Employee access** field is checked from the **Document Type** form.
Direct Reports	List of the employees who report directly to the user.
Colleagues	List of other employees who have the same manager as the user.
Cases	Open HR cases for the user.
Legal Holds	Lists legal or litigation holds on any employee-related documentation. Click **Add Legal Hold** or **New** to place documents associated with the employee on legal hold.
Employee Union Memberships	Lists the labor union information associated with the employee. Select **New** to add labor union information for the employee. For more information, see Create employee union memberships.

5. Click **Submit** and return to the **HR Profiles** list page or **Save** and remain on the **HR Profile** form.

Note: Some HR profile information, such as department, is synchronized between the User [sys_user] and HR Profile [hr_profile] records. Updating information in one record automatically applies the updates in the other record.

Add or modify contacts for HR

You can add or modify contact information to an HR profile and specify who to contact in an emergency through the Contacts module or related list.

Before you begin

Role required: admin

For information on creating or editing an HR profile, see Add or modify an HR profile.

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
2. Click **New** or an existing contact.
3. Enter or modify the contact name, telephone numbers, and other information.
4. In the **Employee** field, click and select the employee that the contact is associated with.
5. To specify the person as an emergency contact, check the **Emergency contact** box. The **Priority** field appears.
6. Select the priority of the contact, **Primary**, or **Alternate**.
7. Click **Submit** and return to the **HR Contacts** list or **Save** and remain on the **HR Contact** form.

Who is covered

You can create or modify who is covered under an employee benefit plan using the HR Health Benefits module.

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Before you begin
Role required: sn_hr_core.manager

About this task
Employees request to create or modify who is covered under their benefit plan by submitting a request through the HR Service Portal. Once a contact is added to the HR application, HR agents can add a contact as a beneficiary to an employee benefit record.

Procedure
1. Navigate to **All** > **HR Profile** > **Who is covered**.
2. Click **New** or an employee to open a record.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

HR Beneficiary form

Field	Description
Employee	The user who submitted the case. Click the **Lookup using list** icon and select the employee.
Contact	Click the **Lookup using list** icon to view a list of contacts for the employee. Click **New** to enter a new contact for the employee. You can specify the relationship to the employee and emergency contact here.
First name	First name of the beneficiary. Displays from **Contact** information.
Last name	Last name of beneficiary. Displays from **Contact** information.
Relationship	Relationship to the employee.
National tax ID	Social security number of the beneficiary or tax ID number for a trust account.
Date of birth	Beneficiary birth date.
Gender	Gender of the person being covered.

4. Click **Submit**.
   The person covered is listed in the **Who is covered** list.
5. To modify who is covered data, use the **Who is covered** list.
   You can use the list search menu by typing the who is covered name and pressing Enter. You can also search on the employee name the same way.
6. Click the who is covered name to open the form.
7. Modify the form.
8. Click **Update**.

Add or modify a beneficiary

As an employee, you add a beneficiary to your benefit plan from the Employee Center.

Before you begin
Role required: none

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About this task

Employees can request to add or modify a beneficiary to a benefit plan by submitting a request through the Employee Center.

Alternatively, a manager can submit a tuition reimbursement request by opening an HR case: Create an HR case.

Procedure

1. From the Employee Center menu, navigate to **Human Resources** > **Benefits** > **Health and wellness**.
2. Click the **Add Beneficiaries** request.
3. Complete the form.
   The fields you see depend on how the form is configured and what fields are selected to display.

HR Beneficiary form

Field	Description
Employee	The user who submitted the case. Click the lookup icon and select the user.
Contact	Click the **Lookup using list** to view a list of contacts for the employee. Click **New** to enter a new contact for the employee. You can specify the relationship to the employee and emergency contact here.
First name	First name of the beneficiary. Displays from **Contact** information.
Last name	Last name of beneficiary. Displays from **Contact** information.
Date of birth	Beneficiary birth date.
National tax ID	Social security number of the beneficiary or tax ID number for a trust account.
Trust	Check if the beneficiary is a trust.
Relationship	Relationship to the employee.
Benefit type	Type of benefit, such as, 401(k), Basic Life, Retirement Plan, or Voluntary Life.
Beneficiary type	Primary or contingent.
Percentage	Percentage amount of the benefit distributed to the beneficiary.

4. Click **Submit**.
   The system creates an HR case and assigns it to the configured HR person. View the status of your request from the **My Requests** tab.

Enroll in a health plan

As an employee, you can submit a question about or enroll in a company health plan such as medical, dental, or vision from the Employee Center.

Before you begin

Role required: none

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About this task
Employees can ask questions about company benefits and enroll in a medical, dental, or vision plan by submitting a request through the Employee Center.

Alternatively, a manager can submit an enrollment request by opening an HR case: Create an HR case.

Procedure
1. From the Employee Center menu, navigate to **Human Resources** > **Benefits** > **Health and wellness**.
2. Click the **Medical Plan Enrollment**, **Dental Plan Enrollment**, or **Vision Plan Enrollment** request.
3. Complete the form.
   The fields you see depend on how the form is configured and what fields are selected to display.
4. Click **Submit**.
   The system creates an HR case and assigns it to the configured HR person. View the status of your request from the **My Requests** tab.

Add or modify Life, AD&D insurance benefits

You can add or modify an insurance benefit for an employee using the HR Benefits module.

Before you begin
Role required: sn_hr_core.basic, or sn_hr_core.manager

About this task
Employees can ask questions about insurance benefits and request to enroll in or modify an insurance plan by submitting a request through the HR Service Portal. An insurance benefits case is opened and can be viewed and managed.

Procedure
1. Navigate to **All** > **HR Profile** > **Life, AD&D Insurance Benefits**.
2. Click **New** to open an insurance benefit record.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

HR Insurance Benefit form

Description	Field
The name of the insurance plan. Click the **Lookup using list** icon and select the plan for the employee.	Plan
The user who requested enrollment. Click the **Lookup using list** icon and select the user.	Employee
The membership/enrollment ID number of the employee.	Plan ID
The life insurance company that provides the insurance benefit. Fills in when the plan is selected.	Provider
The type of insurance plan. Fills in when the plan is selected.	Plan type

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Field	Description
Coverage type	Enter the coverage type of the plan. An example is Family Coverage or Individual Plan. Not all insurance plans have coverage type.
Term	The period the insurance policy covers.
Beneficiaries	Click the **Lookup using list** icon to search for and select contacts that are beneficiaries.
Who is covered	List of family members of the employee covered under the health benefit.
Start date	Date when the benefit is active for the employee and beneficiaries.
End date	Date when the benefit is no longer active for the employee and beneficiaries.
Employer Contribution (per paycheck)	Dollar amount employer contributes to plan per paycheck.
Employer Contribution (per year)	Dollar amount employer contributes to plan per year.
Employee Contribution (per paycheck)	Dollar amount employee contributes to plan per paycheck.
Employee Contribution (per year)	Dollar amount employee contributes to plan per year.

4. Click **Submit**.
   The insurance benefit is listed in the **HR Insurance Benefits** list.
5. To modify insurance benefit data, find the existing insurance benefit in the **HR Insurance Benefits** list.
   You can use the list search menu by typing the employee name and pressing Enter.
6. Click the health benefit to open the form.
7. Modify the form.
8. Click **Update**.

Enroll in the company retirement plan

As an employee, you can submit a question about, or enroll in the company retirement plan from the Employee Center.

Before you begin

Role required: none

About this task

Employees can ask questions about retirement benefits and request to enroll in a retirement benefit plan by submitting a request through the Employee Center.

Alternatively, a manager can submit a tuition reimbursement request by opening an HR case: Create an HR case.

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Procedure

1. From the Employee Center menu, navigate to **Human Resources** > **Benefits** > **Retirement**.
2. Click the **401(k) Plan enrollment** request.
3. Complete the form.
   The fields you see depend on how the form is configured and what fields are selected to display.
4. Click **Submit**.
   The system creates an HR case and assigns it to the configured HR person. View the status of your request from the **My Requests** tab.

Add or modify disability insurance benefits

You can add or modify a disability insurance benefit for an employee using the Disability Insurance Benefits module.

Before you begin
Role required: sn_hr_core.basic, or sn_hr_core.manager

About this task
Employees can ask questions about disability insurance benefits or be enrolled in or modify their disability insurance program. A disability insurance benefits case is opened and can be viewed and managed.

Procedure

1. Navigate to **All** > **HR Profile** > **Disability Insurance Benefits**.
2. Click **New** to open a disability benefit record.
3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

Disability benefit record form

Field	Description
Plan	The name of the disability insurance plan. Click the **Lookup using list** icon and select the plan for the employee.
Plan type	The type of health benefit plan. Fills in when the plan is selected.
Plan ID	The identification number of the health plan.
Start date	Date when the benefit is active for the employee and beneficiaries.
End date	Date when the benefit is no longer active for the employee and beneficiaries.
Employee	The user who requested enrollment. Click the **Lookup using list** icon and select the user.
Employee Contribution (per paycheck)	Dollar amount employee contributes to plan per paycheck.
Employee Contribution (per year)	Dollar amount employee contributes to plan per year.
Employer Contribution (per paycheck)	Dollar amount employer contributes to plan per paycheck.

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Field	Description
Employer Contribution (per year)	Dollar amount employer contributes to plan per year.

4. Click **Submit**.
   The health benefit is listed in the **HR Disability Benefits** list.
5. To modify insurance benefit data, find the existing insurance benefit in the **HR Disability Benefits** list.
   You can use the list search menu by typing the employee name and pressing Enter.
6. Click the amount under the **Employee Contribution** column to open the form.
7. Modify the form.
8. Click **Update**.

Add or modify employee union membership

Use Employee Union Membership to identify employees that belong to a union and associate their union information to their HR profile.

Before you begin
Role required: admin

Create employee union memberships

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
2. Select **New** or an existing HR profile.

   Note: For information on the fields to complete an HR profile, see Add or modify an HR profile.

3. After creating a new or editing an existing HR profile, select **Save**.
   The HR profile related list appears.
4. From the **Employee Union Membership** tab, select **New**.
5. After entering the required information, select **Save** or **Submit**.

Setup or update your direct deposit

As an employee, setup or update direct deposit from the Employee Center.

Before you begin
Role required: none

About this task
Employees can ask questions about or setup/update direct deposit by submitting a request through the Employee Center.

Alternately, a manager can submit a tuition reimbursement request by opening an HR case: Create an HR case.

Procedure

1. From the Employee Center menu, navigate to **Human Resources** > **Compensation**.
2. Click the **Direct Deposit Setup** request.

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3. Complete the form.
   (The fields you see depend on how the form is configured and what fields are selected to display.)

Direct Deposit Setup form

Field	Description
Account nickname	A brief, descriptive term for your account, allowing personalization and easy identification.
Bank routing number	The unique identifier for the bank associated with the account.
Account number	The unique identifier for your individual bank account.
Account type	Identifies the classification of the account. Choose from: ○ Checking ○ Savings ○ Other
Deposit type	Type of direct deposit. Choose from: ○ Amount ○ Percentage ○ Remaining balance
Deposit amount	Displays when Amount is selected for Deposit type. Enter the dollar amount for direct deposit.
Deposit percentage	Displays when Percentage is selected for Deposit type. Enter the percentage amount for direct deposit.

4. Click **Submit**.
   The system creates an HR case and assigns it to the configured HR person. View the status of your request from the **My Requests** tab.

Request tuition reimbursement

As an employee, you can submit a question about, or request tuition reimbursement from the Employee Center.

Before you begin

Role required: none

About this task

Employees can ask questions about approved courses and request tuition reimbursement by submitting a request through the Employee Center.

Alternatively, a manager can submit a tuition reimbursement request by opening an HR case: Create an HR case.

Procedure

1. From the Employee Center menu, navigate to **Human Resources** > **Benefits** > **Education Reimbursement**.
2. Click the **Tuition Reimbursement** request.

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3. Complete the form.
   The fields you see depend on how the form is configured and what fields are selected to display.

HR Tuition Reimbursement form

Field	Description
School/Program name	Name of the school or program where you took the course.
Course Title	Name of the course you took.
Course justification	Explanation of why you took the course.
Course start date	Date when the course started.
Course end date	Date when the course ended.

4. Click **Submit**.
   The system creates an HR case and assigns it to the configured HR person. View the status of your request from the **My Requests** tab.

Add or modify accommodations

You can add, modify, or view accommodation requests for an HR profile. Accommodations are requests from your employees related to their work situation.

Before you begin

Role required: sn_hr_er.case_writer

Note: For more information, see Employee Relations accommodations.

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
2. Select an HR profile from the list.
3. Scroll down to the related list and select the **Accommodations** tab.
4. Select **New** or to edit, select the **Status** link.

   Note: For information on creating an accommodation request, see Add or modify accommodations.

5. Select **Submit** or **Update**.

HR Dashboards & Reports

The HR Dashboards & Reports application provides the HR organization with visual representations of accountability, progress, performance metrics, monitor employee satisfaction, and status on HR cases in the scoped version of HR.

Depending on your HR job function, you can use any of the following tools to help you with day-to-day HR operations.

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- Dashboards, including the Overview, Case, and Manager Dashboard. Dashboards are a type of homepage containing reports and other widgets. You click a listed record or a segment in a report to see details.
- HR reports, including reports that are available on the dashboards. Several HR reports are predefined for you, and you can create more reports.
- Survey response charts and detail for the HR case satisfaction survey or other HR surveys that you create.

You can customize any dashboard that you can access to add or remove reports and other widgets. For example, an HR benefits administrator adds a report to the Overview dashboard that displays the status of HR cases in the **Benefits** service.

Actions

Button	Description
Add content	Click, highlight topics, and move to sections of the page.
Change Layout	Click the column layouts on the left.
Save the chart as an image file	If a menu icon appears when you point your cursor to a chart, you can click the icon to export the chart to an image file.

The HR Dashboards & Reports provide:

- Overview
- Manager Dashboard
- HR Case Dashboard
- Reports
- Satisfaction Survey Scorecard

Migrating HR dashboards to Platform Analytics Workspace

For enhanced user experience, the HR Overview Dashboard, the Manager Dashboard, the HR Case Dashboard, and the SLA Dashboard have been migrated to Platform Analytics Workspace. Select the Analytics Center icon to open the migrated dashboards in Platform Analytics Workspace.

Note: Ensure you have installed Platform Analytics Workspace from ServiceNow® Store and have the pa_viewer role.

View Overview Dashboard

The Overview dashboard provides a graphical representation of HR cases.

Before you begin
Role required: sn_hr_core.manager

About this task
By default, the Overview Dashboard shows the following reports:

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- HR Cases Opened in the Last 6 Months by Topic Category: Provides a color coded bar chart on the number of cases opened in the last six months by type of Topic Category.
- Active HR Case Breakdown by Topic Category: Provides a bar chart color coded by active HR cases and the HR agent assigned.
- Active HR Cases by Topic Category: A pie chart, color coded by active HR cases by Topic Category.
- Active HR Cases Pivot Table by Topic Category: A spreadsheet that cross-references the HR agent assigned to the HR case by Topic Category with number of cases.

You can customize any dashboard that you can access to add or remove reports and other widgets.

Procedure

1. Navigate to **All** > **HR Dashboards & Reports** > **Overview**.
2. Perform any of the following actions.

Action	Description
Add content	Click, highlight topics, and move to sections of the page.
Change Layout	Click the column layouts on the left.
Save the chart as an image file	If a menu icon appears when you point your cursor to a chart, you can click the icon to ex port the chart to an image file.

View Manager Dashboard

You can use the Manager Dashboard to monitor HR team effectiveness based on metrics. Metrics includes state of assigned cases by HR agent and service level agreement (SLA) elapsed time percentage.

Before you begin

Role required: sn_hr_core.manager

About this task

By default, the following reports appear on the Manager Dashboard:

- Case Satisfaction Survey - 30 Day AVG: Evaluate the satisfaction of employees with the handling of HR cases. This chart shows information if you ask employees to complete the HR Request Satisfaction Survey.
- HR Case SLAs by Elapsed Time Percentage: Monitor the time to resolve HR cases and follow up when case SLAs are breached.
- Active HR Cases by Assignment And State: Review the numbers of HR cases assigned to each HR agent by state, for example, **Ready** or **Work in Progress**, to help you evaluate the effectiveness of each HR agent.
- HR Case Transfer Rate: Review the number of cases transferred to a different HR agent by case category to determine whether the right assignments are taking place.

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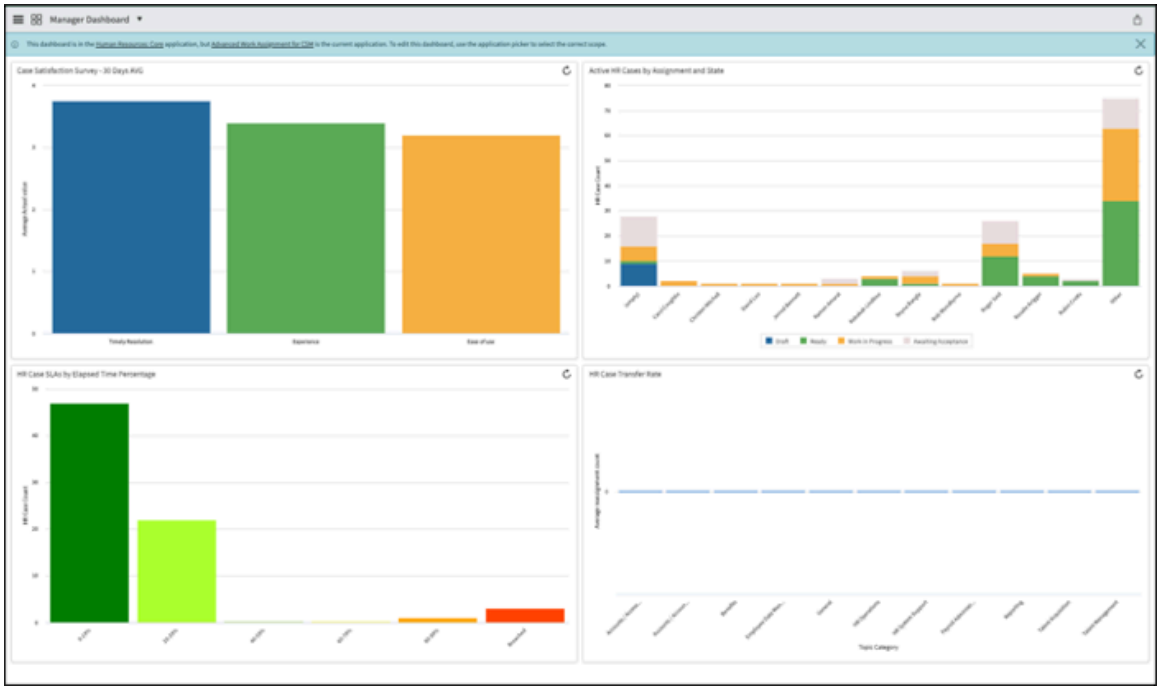

You can customize any dashboard that you can access to add or remove reports and other widgets. For example, an HR benefits administrator adds a report to the Manager Dashboard that has the assignment and state of HR cases in the **Benefits** category.

Procedure

1. Navigate to **All** > **HR Dashboards & Reports** > **Manager Dashboard**.
2. Perform any of the following actions.

Action	Description
Add content	Click, highlight topics, and move to sections of the page.
Change Layout	Click the column layouts on the left.
Save the chart as an image file	If a menu icon appears when you point your cursor to a chart, you can click the icon to ex port the chart to an image file.

View HR Case Dashboard

The HR Case Dashboard is a central place for HR users to monitor ongoing HR operations. The dashboard contains reports that query the database and display the results.

Dashboards are the home pages for products on the ServiceNow instance. The HR Case Dashboard provides summary information about your Open/Assigned cases, High Priority cases, and cases breached by the Service Level Agreement (SLA). It displays cases by service and cases assigned to you.

To show the HR Case Dashboard, navigate to **HR Dashboards & Reports** > **HR Case Dashboard**.

Features of the HR Case Dashboard

The HR Case Dashboard shows:

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- The number of Open/Assigned cases.
- The number of High Priority cases.
- The number of cases that have breached an SLA.
- The details of all cases assigned to you.
- All cases assigned to you by Topic Category.

Run Reports

You can run reports to view and monitor the status of HR cases.

Before you begin

Role required: sn_hr_core.manager, sn_hr_core.admin, sn_hr_core.basic

About this task

Use HR reports to improve overall efficiency and effectiveness. For example, you can view all Employee Relations cases that were created in the past month.

Procedure

1. Navigate to **All** > **HR Dashboards & Reports** > **Reports**.

   Reports in the HR report group are listed. The icon to the left of the report indicates the type of report, such as a list, pie chart, or bar chart. Point your cursor to the icon to see a pop-up window of report information. Click the star on the left to make the report a favorite. You can filter for favorite reports by clicking the star above the Reports list.

2. Click the name of the report to run.
   The report opens with the runtime options and the results.
3. Perform any of the following actions.
   - Change any runtime option and click **Run** to see the results.
   - In a list report, click a listed case to see its details.
   - In a chart, click a segment to see the corresponding cases.
   - Publish or schedule the report.
   - Edit the runtime options and save a new report.

What to do next

If you want to create additional HR reports, click **Create a report** above the Reports list. After you create reports, share them with the HR report group. Once on the Reports list, the group can view them.

Related topics

Getting started with reports

Available HR reports

Predefined HR reports are available in the **HR Case Management** > **Reports** list.

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Available reports

Report name	Description	Displays
Active HR Cases	Tabular view of all active cases.	Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to
Active HR Cases Pivot Table by Category	Pivot table view of all active cases.	Assigned to, Category
Active HR Onboarding IT Requests	Tabular view of onboarding tasks assigned to IT, for example, for computers and other office equipment.	Number, Priority, State, Short description, Assigned to, Location
Case Satisfaction Survey - 30 Days AVG	Bar chart showing the averages over 30 days of responses to the HR case satisfaction survey.	Average Actual Value, Metric
Cases Awaiting Approval	Count of unapproved HR cases or requests.	Number
HR Case SLAs by Assigned	Bar chart showing the number of overdue cases by the assigned user.	Count, User, State
HR Case SLAs by Elapsed Time Percentage	Bar chart showing the number of cases by the elapsed time percentage until the SLA is breached.	Count, Elapsed time percentage
HR Case Transfer Rate	Bar chart showing the number of reassignments for an HR agent by category for the last six months.	Number of reassignments, Category
HR Cases Opened Last Month by Category	Bar chart of cases raised over the last month by HR case category.	Category, Count, Month
HR Cases Opened This Month by Category	Bar chart of cases raised over the current month by HR case category.	Category, Count
My HR Cases by Category	Pie chart of cases assigned to you, where each slice represents an HR case category.	Category, Count
Open High Priority Cases	Count of active high priority HR cases	Number
Open Onboarding cases	Count of active onboarding cases	Number
SLA Breached	Count of HR cases with a breached SLA	Number

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Available reports (continued)

Report name	Description	Displays
Unassigned HR Cases	List of HR cases not assigned to any user.	Number, Type, Category, State, Short description, Opened by, Assignment group, Assigned to

Related topics

HR Administration

Evaluate HR survey responses

After you have collected responses to an HR survey, you can review the survey responses and scorecard.

Before you begin

Role required: sn_hr_core.manager, or sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Surveys** > **All HR Surveys**.
2. Select a survey to evaluate the responses.
3. Select the **View Responses** related link to review individual responses to each question and perform any of the following tasks.

Task	Action
See individual responses for a metric (question)	Expand the metric group in the Metric Results list.
View responses based on when the survey was taken	Personalize the Metric Results list to include the **Created** column, and add a filter using the condition builder. For example, to see all responses since the beginning of the month, add this condition: **[Created] [at or after] [<select date>]**

   If the survey was not submitted anonymously, you can see how users answered and follow up if necessary.
4. Select the **View Scorecard** related link to review the survey scorecard.
   For more information, see Satisfaction Survey Scorecard.

Related topics

HR surveys

Survey responses and results

View a survey scorecard

Satisfaction Survey Scorecard

Apply filters to refine the predefined HR satisfaction surveys results to analyse and gain insight into the survey.

A scorecard displays charts for survey results, in which category and question responses are analyzed and current ratings are compared with previous ratings. Users can examine ratings over

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time, compare question ratings, or compare the ratings of all categories. All ratings are averages for the time range selected. The system dynamically updates a scorecard each time you view it, so the ratings reflect recently completed surveys.

Use these options to refine the results according to your requirement.

Satisfaction survey scorecard options

Task	Action
Display a different view for the scorecard	Select the view from the left choice list above the chart. The interactive scorecard shows the name of the survey and results or comparisons of the ratings. Show results in the following views: following views: • Category Results • Question Results • Average Ratings • History
Save a chart as an image	Click the menu icon and select the type of image file. After the file is generated, click **Download**. The file is downloaded to the download folder of your browser.

Note: This view displays responses that use the following data types:

- Checkbox
- Choice
- Likert Scale
- Number
- Template
- Yes/No

The **Checkbox** and **Yes/No** data types are combined into the **Boolean** data type in the Survey Designer

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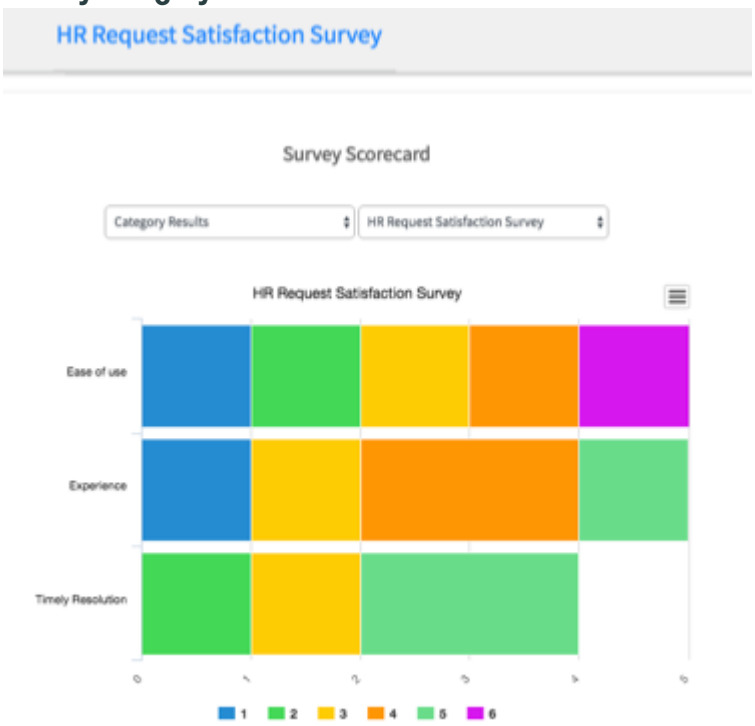
Survey category results



To view details about a specific response, point to a colored bar, the number of responses, and the percentage it represents displays.

Survey scorecard category results detail



HR Service Delivery Process Mining

Integrating the Process Mining application with the HR Service Delivery application enables you to analyze processes relevant to your KPIs, and identify bottlenecks associated with HR service cases and, if installed, Lifecycle Events cases.

Process Mining for HR Service Delivery feature overview

Process Mining for HR Service Delivery enables companies to analyze and improve service delivery processes. It leverages Process Mining capabilities in the ServiceNow platform and offers a best practice content pack for HR Service Delivery.

The HRSD Process Mining content pack contains preconfigured process mining models that help analysts and process owners understand the effectiveness of their processes, including opportunities for continued performance improvement.

Note: As a process mining analyst, you can mark the content pack configurations as read-only, to preserve their custom configurations across upgrades.

Use Process Mining to discover, streamline, visualize, analyze, monitor, and more.

- **Visualize your processes**: Map processes across system and functional boundaries based on data analysis.
- **Streamline your processes**: Identify bottlenecks, siloes, redundancies, and other inefficiency drivers.

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- **Automate your processes**: Identify frequent, consistent, and repeated tasks that are suitable for automation.
- **Improve your processes**: Link process maps to KPIs to perform root cause analysis and identify drivers of performance.

For complete information about the Process Mining application and how it relates to and integrates with HR Service Delivery, see Process Mining.

To enable the Process Mining content pack for HR Service Delivery, see .

HR Service Delivery Process Mining configuration model

HR Service Delivery Process Mining configuration model includes process definitions for standard HR services, as well as a process map that uses multi-dimensional mining for Lifecycle Events if this application is installed.

Process maps and transitions look across your portfolio of HR services to find and visualize problem areas, opportunities for enhancements, and process compliance.

Process definitions and multi-dimensional mining

All standard HR services	Lifecycle Events (if installed)
Looks across HRSD to find deviations and problem areas.	Provides a Lifecycle Event process map using multi-dimensional intelligent mining.
Provides a single HR service view, enabling you to drill down to find bottlenecks and other fulfillment issues.	Access automated end-to-end process visibility on multi-relational processes and tables.
Automatically notifies process owners when common issues are detected using process configurations, such as channel performance degradation, KPI obtainment trends (for example, SLA), or too much variation between what is expected versus what is actual.	Quickly find key drivers behind process problems using an AI-based root cause analyzer.

End user and roles

If you have the required roles, you can use Analyst Workbench to access the visualized process workflow data, and tools for analyzing the data related to HR service cases. For more information, see Overview of the Analyst Workbench.

The following combinations of roles are required for using the Process Mining application with HR Service Delivery.

Combinations of roles

Process Mining role	HR Service Delivery role
sn_process_optimization_admin	sn_hr_core.admin

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Combinations of roles (continued)

Process Mining role	HR Service Delivery role
sn_process_optimization_power_user	sn_hr_core.case_writer
sn_process_optimization_analyst	sn_hr_core.basic

Optimization project for HR service cases

The HRSD Process Mining content pack (com.sn_hr_process_mining) adds a prebuilt project that includes predefined HR service cases and, if installed, Lifecycle Events cases process model definitions. By default, the project filters cases for the last two quarters. You can also configure a new process project based on the prebuilt project. For more information, see Using Process Mining.

The process model definitions include default activity definitions and breakdown definitions for cases that you can use as they are or modify for a custom configuration.

- Use activity definitions to understand state transitions such as cases transitioning from the work in progress state to the solution proposed state and analyze the linked processes such as Problem (PRB) records.

  Note: The content pack activity definitions can be set to either ALL or INCLUDE based on whether the field values are populated or not in the `field_values_selection_type` column in the `promin_activity_def` table, so that the correct number of activities are available by default for each project.

- Use breakdown definitions to filter records and analyze a process map by categories. For example, you can filter the HR service case data by different channels, products, assignment groups, and locations.

Continual Improvement Management initiative for HR cases

If the Continual Improvement Management (CIM) application is enabled, you can also use the CIM project from the Analyst Workbench to track the progress of improvement initiatives for HR cases. The improvement initiative and process optimization model are automatically linked. For more information, see Integration with Continual Improvement Management.

Performance Analytics for HR cases

If the Performance Analytics (PA) application is enabled, you can also use the available template configurations to open the Process Mining application from a PA indicator based on the HR service case data. For more information, see Integration with Performance Analytics (PA).

HR Service Delivery integration with Service Portfolio Management and Digital Portfolio Management

HR Service Delivery integration with Service Portfolio Management and Digital Portfolio Management enables you to manage HR services in a standardized, structured format as suggested in the Common Service Data Model (CSDM) methodology. It ensures that the hierarchy in which you define services is consistent with the hierarchy of other business units.

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Integration with Service Portfolio Management and Digital Portfolio Management Overview

Larger enterprise customers on their journey to embrace the vision of Enterprise Service Management face the problem of different work flows following different data models and hierarchy which makes it difficult to provide a uniform view of all services. These customers require a common interface, a single place for monitoring metrics, viewing services, and getting similar information across the work flows. With this integration:

- HR Services are mapped within the hierarchy of CSDM, providing a consistent way for the service owners to define appropriate business services.

Mapping

HR Service Delivery	Common Service Data Model
COE (Center of Excellence) For example: Total Rewards	-
Topic Category For example: Benefits	Taxonomy Node For example: Laptop Support (Service)
Topic Details For example: Dental	Services For example: Laptop Support (Service)
HR Service - Record Producer For example: Dental Benefits Inquiry	Service Offerings For example: ○ Executive Laptop Support (Service Offering): 15 " Portal Plan laptop (Catalog Item) ○ Standard laptop Support (Service Offering): 13" Portals Plan Laptop (Catalog Item)

- HR Services appear as part of the overall services in Human Resource Portfolio in Enterprise Portfolios in Digital Portfolio Management. With Digital Portfolio Management, you can manage and maintain all your services, applications, and products from a single location. It enables you to surface data from solutions you own as well as from solutions that you don't own but rely on from other ServiceNow products.

Activation information

First, activate the Human Resources Scoped App: Core [com.sn_hr_core] application. Activating the application automatically activates Service Portfolio Management.

Next, activate Digital Portfolio Management to view HR services in Digital Portfolio Management dashboard.

Work flow

1. Activate the required applications.
2. Create a service table configuration in Service Portfolio Management.

Note: Default HR service table configuration is available for use.

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3. Configure CSDM service mappings.

> **Note:** Demo data for HR CSDM service mappings is available for use.

Adopt CSDM methodology

Manage services of your business unit in a standardized, structured format as suggested in the Common Service Data Model (CSDM) methodology. Ensure that the hierarchy in which you define services is consistent with the hierarchy of other business units.

Before you begin

Role required: admin

About this task

Customers require a common interface, a single place for monitoring metrics, viewing services, and getting similar information across the work flows. With this feature, you can:

- Map your services in the hierarchy of CSDM, providing a consistent way for the service owners to define appropriate business services.
- View your services as part of the overall services in Digital Portfolio Management. With Digital Portfolio Management, you can manage and maintain all your services, applications, and products from a single location. Surface data from solutions you own as well as from solutions that you don't own but rely on from other ServiceNow products.

Procedure

1. Create a business or technical service and corresponding service offering records for your business unit.
2. Create a service table configuration in Service Portfolio Management.
3. Map your BU service to CSDM Service or Service Offering.
   For more information, see Configure CSDM service mappings.
4. Add your business unit logic to populate Service and Service Offering columns in task records or resulting BU records that are created by using the BU service (For example: HR service use case).
   The table must have Service and Service Offering columns.
5. Create a service portfolio and add the required taxonomy nodes.
   For more information, see Service Portfolio Management.
6. Map BU service to the taxonomy nodes in the Services related list.

> **Note:** After the Service is mapped, related offerings are automatically selected. You can create or edit the offerings related to the service.

7. Configure KPI group and indicators for your business unit in the Digital Portfolio Management dashboard.
   For more information, see Digital Portfolio Management.
   - To display the KPIs in Digital Portfolio Management, create a KPI group and add the required KPIs. Once KPIs are added, add group mapping to associate the group with correct taxonomy node where you want to display indicator data.
   - The PA indicators must have the correct breakdown assigned. For example, if you are creating an indicator for service offering, add the **DPM: Service Offerings breakdown** to that indicator. Before adding the breakdown, make sure the record table exists in breakdown mappings.

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Note: Make sure that the service is in operational state, so that indicators can work as expected.

- After you have added the above configurations and the required data, you can view analytics in Digital Portfolio Management dashboard.

HR Service Delivery and CSDM tables

HR Service Delivery manages (contributes data to) CSDM tables. HR Service Delivery also uses data from CSDM tables that other applications generate. Several ServiceNow products, therefore, benefit from and add value to HR Service Delivery.

Implementing the CSDM data framework

See Implementing the CSDM framework in stages.

CSDM tables used by HR Service Delivery

1. Service table configuration: Use to create a service table configuration for your Business Unit (BU). Associate your BU service mappings to the correct service table configuration.
2. CSDM service mapping: Use to configure CSDM service mappings to the appropriate service table mappings. Ensure that the services or service offerings are tagged with the right business portfolio.

Products that add value to HR Service Delivery

Using HR Service Delivery with the following ServiceNow products can increase its benefits to your organization.

Service Portfolio Management (Service Portfolio Management)

Enables organizations to document and manage services using a standardized, structured format.

Digital Portfolio Management

Enables organizations to manage and maintain all your solutions (services, service offerings, business applications, and application services) from a single location.

Products that benefit from integration with HR Service Delivery and CSDM

HR Integrations

Integrate HR Service Delivery with HR management systems to synchronize employee profiles, to-dos, and other data; background check systems to request background checks; e-signature systems to request electronic signatures; and more.

HR Services that are used in HR integrations can be mapped within the hierarchy of CSDM, providing a consistent way for the service owners to manage the services and understand metrics from one place.

Lifecycle events

Lifecycle Events enable the fulfillment of HR cases that are related to various employee journeys and transitions.

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The Lifecycle Events application helps to facilitate daily activities among various cross-functional processes and departments. It makes completing processes that relate to an employees daily life more efficient and easier.

HR Services that are used in Lifecycle Events can be mapped within the hierarchy of CSDM, providing a consistent way for the service owners to manage services and understand metrics from one place.

Roles for CSDM service table configurations and service mappings

Roles required for creating or viewing Common Service Data Model (CSDM) service table configurations and service mappings.

Roles

Roles	Description
Service Administrator [service_admin]	Can Create a service table configuration in Service Portfolio Management.
Service Editor or Service Author [service_editor], [service_author]	• Can read a configuration in Service Table Configuration. • Can Configure CSDM service mappings, only if the user is the owner of the service.
Service Viewer [service_viewer]	• Can read a configuration in Service Table Configuration. • Can read CSDM service mappings.

Create a service table configuration in Service Portfolio Management

Create a service table configuration for your Business Unit (BU). Associate your BU service mappings to the correct service table configuration.

Before you begin

Role required: service_admin

Procedure

1. Navigate to **All** > **Service Portfolio Management** > **CSDM Configuration** > **Service table Config**.
2. Click **New**.
3. On the form, fill in the fields:

Service table configuration form

Field	Description
Name	Name of the service.
Service table	BU table to which the service is mapped.
Mapping level	Mapping level associated with the Service table configuration:

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Field	Description
	○ Service: Parent service ○ Service offering: Refines the parent service to a specific business need and performance level.
Application	Application to which the service table configuration is associated.
Active	Option to activate or deactivate the service table configuration.

4. Click **Submit**.

Configure CSDM service mappings

Configure Common Service Data Model (CSDM) service mappings to the appropriate service table mappings. Ensure that the services or service offerings are tagged with the right business portfolio.

Before you begin

Role required: service_editor, or service_author

Procedure

1. Navigate to **All** > **Service Portfolio Management** > **CSDM Configuration** > **CSDM Service Mapping**.
2. Click **New**.
3. On the form, fill in the fields:

CSDM service mapping form

Field	Description
Service table	Service table to which the mapping is associated. **Note:** Only the tables configured in the service table configuration of your business unit appear.
Service	Name of the HR service.
CSDM service offering	CSDM service offering or service with which you want to map your BU service.
Active	Option to activate or deactivate the service mapping.

4. Click **Submit**.

HR Benchmarks

The HR Benchmarks application provides you with an insight into the industry averages of your peers. Use your Key Performance Indicators (KPIs) to compare your performance with global benchmarks, which contributes to improved performance for your organization.

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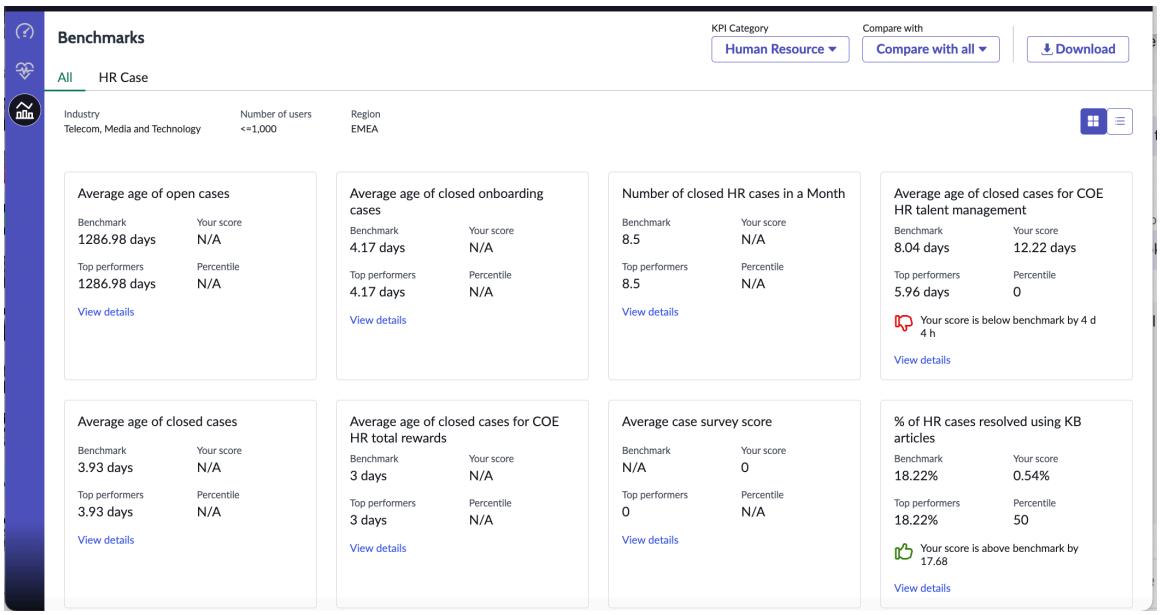
Key features

- Percentile ranking to indicate your standing within your participating peer group.
- Integration with ServiceNow Performance Analytics for daily data collection and drill down on KPI data.
- Data filtering by industry, number of users, or geographical region.
- Category-based roles to limit data access.
- Ability to change KPI definitions to match customizations.
- ServiceNow Benchmarks dashboard in ServiceNow Service Portal (mobile friendly).
- Ability to download KPI reports in a PDF format.

HR Benchmarks Dashboard



The KPIs in the HR Benchmarks application are performance analytics indicators that only collect the usage count data, for example, the number of closed HR cases in a month, based on the monthly aggregates. During data collection, the HR Benchmarks application does not consider any other details such as description of cases, or information about requests, changes, or applications.

The participating customer count for each cohort bucket in Industry Category, User Size, and regions aggregates are large enough to calculate monthly benchmarks values and to maintain full anonymity. To further verify data anonymity, the HR Benchmarks user interface enables you to use only one filter at a time.

Important: To learn more about the Benchmark features, see the Benchmarks documentation.

Customizing HR benchmarks

Choose HR KPIs based on your business requirements.

Before you begin
Role required: sn_hr_core.case_writer

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Note: The HR benchmarks feature is available by default when the Human Resources Scoped App: Core [com.sn_hr_core] and Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events] plugins are installed.

Procedure

1. Navigate to **All** > **Benchmarks** > **Administration** > **Setup**.
2. Select **Human Resource** to view the list of HR Benchmarks KPIs.
3. Select KPIs that you need for your organization.
   - To opt out from using a KPI, select **Opt out**.
   - To modify Key Performance Indicators (KPIs) formula according to your requirement and analysis criteria, select **Modify**.

Using HR Benchmarks

Gain instant visibility into your key performance indicators (KPIs) and trends, as well as comparative insight relative to industry averages of your peers and to the industry top performers.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **Benchmarks** > **Dashboard**.
   The Benchmarks Dashboard page is displayed.
2. Select **Human Resource** in KPI Category.
   The HR KPIs are displayed.
3. To change the way that the KPIs are displayed on the dashboard.
   - Card view icon ( ): View your KPIs in a card view.
   - List view icon ( ): View your KPIs in a list view.
4. To select the area in which you want to compare your data, use the **Compare with** list.
   - **Industry**: Option to compare your data based on industries.
   - **Number of users**: Option to compare your data based on the number of users.
   - **Region**: Option to compare your data based on region.
5. To download the report in a PDF format, click **Download**.

HR Benchmarks KPIs

You can enable or disable a benchmark KPI, and customize KPI conditions. Integration with Performance Analytics provides daily data collection and drill down capabilities on KPI data.

HR Benchmarks KPIs

KPI	Description
Average age of closed onboarding cases	[[Summed duration of closed cases > Lifecycle Event Type.Event type = Onboarding]]/[[Number of closed HR Cases > Lifecycle Event Type.Event type = Onboarding]]/24

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HR Benchmarks KPIs (continued)

KPI	Description
Average age of closed cases for COE HR talent management	[[Summed duration of closed cases > COE = HR Talent Management Case]]/[[Number of closed HR Cases > COE = HR Talent Management Case]]/24
Average age of closed cases for COE HR total rewards	[[Summed duration of closed cases > COE = HR Total Rewards Case]]/[[Number of closed HR Cases > COE = HR Total Rewards Case]]/24
Average age of closed cases for COE HR workforce administration case	[[Summed duration of closed cases > COE = HR Workforce Administration Case]]/[[Number of closed HR Cases > COE = HR Workforce Administration Case]]/24
% of HR cases resolved using KB articles	[[HR cases closed using a KB]]/[[Number of closed HR Cases]] * 100
Average case survey score	HR.Case.Survey.Metric
Average age of open cases	[[Summed duration of open cases]]/[[Number of open cases]]/24
Average age of closed cases	[[Summed duration of closed cases]]/[[Number of closed HR Cases]]/24

Personal Data Rights in HR Service Delivery

HR customers can enable personal data protection for their employees and alumni by implementing General Data Protection Regulation (GDPR) rules as a result becoming a GDPR compliant organization.

HR Service Delivery offers two HR services to conform with Right to be Informed (RTBI) and Right to be Forgotten (RTBF) GDPR requirements:

- Request Personal Information Report
- Erasure of Personal Data

Right to be Informed (RTBI)

RTBI in HR Service Delivery include:

- Classifying the Personally identifiable information (PII) data.
- Approving hierarchy for the report generation. For more information, see Generate Personally Identifiable Information (PII) report.
- Requesting personal information report by an employee or alumni. For more information, see Request personal information report.
- Restricting the service access to the agents in the HR data privacy group.

Right to be Forgotten (RTBF)

RTBF in HR Service Delivery include:

- Creating erasure request. For more information, see Request erasure of personal data.
- Reviewing the erasure request and checking for eligibility.

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- Carrying out the deletion.
- Restricting the service to the agents in the HR data privacy group and the HR data privacy compliance group for approvals.

Customers can choose to anonymize the employees personal data over deletion. For more information, see Data anonymization.

The ServiceNow platform offers other tools like Table cleaner, Archival rules, and Destroy rules, to support minimal data retention by removing outdated data. For more information, see Exploring Data Management. For enhanced data privacy, you can explore Anonymization and Field Encryption. For more info, see Field Encryption.

Request personal information report

As an employee or alumni, request your personal information report so that you can review it or be aware of your personal data held by your organization.

Before you begin

Role required: sn_hr_core.hrsm_employee, sn_asc.alumni, sn_external, snc_internal, sn_hr_core.hrsm_alumni

Note: To use snc_internal and snc_external roles, you must install the explicit_roles plugin.

Procedure

1. Navigate to **All** > *Employee Service Center*.
2. From the **Human resources** tab, select **HR systems**.
3. Select **Personal information report**.
4. On the Personal information report form, fill in the fields.

Personal information report form

Fields	Description
Email	The email address of the employee requesting the report.
Reason for request	A valid justification for requesting the report.
Add attachments	Option to attach any related files.

5. Select **Submit**.

Result

An HR case is created and assigned to an agent belonging to the HR Data Privacy user group. For more information, see Generate Personally Identifiable Information (PII) report.

Alumni can log in to the Alumni Center, go to HR systems and request for the report. For more information, see Using your Alumni Center. In case customers don't have Alumni Center, the agent can create a request on behalf of the alumni.

Create RTBI report template

Create a custom RTBI report template to use for the RTBI report displayed to the employee or alumni. The base system report generation uses the default template HR PII Template.

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Before you begin

Role required: admin

To use this template, you can create a new HR service, and record producer, then add the template in the Template field. For more information on configuring an HR service, see Configure an HR service.

Verify that the following HR services are active:

- Erasure of Personal Data
- Request Personal Information Report

Verify the following In Record produces are active:

- Erasure of Personal Data Request
  - Available For - Users with 'snc_internal' role, HRSM Alumni
  - Not Available For - SNC External (remove this role).
- Personal Information Report
  - Available For - Users with 'snc_internal' role, HRSM Alumni.

Procedure

1. Navigate to **All** > **System Security** > **Data Classification** > **RTBI Report Template**.
2. Select **New**.
3. Enter the Name and Description for the template.
4. In the Body field, create the structure of the template.
   By default, you'll see ${reported_date} ${target_user} ${template_script}, where the reported date, target user, and the template script values are dynamically filled-in.
5. In the Script field, edit the template HTML code if needed.
6. Select **Submit**.
7. Open the newly created template.
8. In the RTBI Configurations related links, select the **Edit** button to add an existing RTBI configuration, or the **New** button to create a new configuration and add it.
9. Select **Preview** to see how the report is displayed for a selected user.
10. Select **Publish** to publish the new report template.

Generate Personally Identifiable Information (PII) report

As an HR agent, generate the PII report requested by the employee or alumni.

Before you begin

Role required: HR agent (sn_hr_core.basic)

PII in HR Core tables are manually identified and classified into categories called classes. For example, Contact information, Identification information, and so on. These classifications serve as a reference, you can also create your own classifications. For more information, see Data Classification.

Note: The classes are available in the data classification module which is auto-installed with HR Core. The classified dictionary entries under each class are included in the HR Core plugin's demo data.

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Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**.
2. Select **Assigned to me**.
3. Select a case with Request Personal Information Report as the HR service and in Ready state.

   Note: If the employee in the HR case has a manager, the case must be approved by the manager before it is moved to the agent. The case is in the Awaiting approval status until the manager approves. If an approver is missing, agents can manually add the approver.

4. Select the **Start work** button.
5. Select the **Generate PII report** button.

Result

The PII report is generated and is added as an attachment to the case.

Note: In case there are ACLs in place to hide information for some of the fields, those fields remain empty in the report and the fields information is displayed in the work notes.

Request erasure of personal data

As an employee or alumni, request erasure of your personal information when you no longer consent to processing, when there are significant errors within the data, or if you believe that the information is being stored unnecessarily.

Before you begin

Role required: sn_hr_core.hrsm_employee, sn_asc.alumni, sn_external, snc_internal, sn_hr_core.hrsm_alumni

Note: To use snc_internal and snc_external roles, you must install the explicit_roles plugin.

Procedure

1. Navigate to **All** > *`Employee Service Center`*.
2. From the **Human resources** tab, select **HR systems**.
3. Select **Erasure of Personal Data Request**.
4. On the Erasure of Personal Data Request form, fill in the fields.

Erasure of Personal Data Request form

Fields	Description
PII data	Specify the type of personal data to be deleted. For example, Phone number, Contact information, and so on.
HR cases	Related HR case number.
What data you want to be deleted?	If you select an HR case, choose if you want to delete the: ○ Entire HR case ○ Attachments only

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Fields	Description
Email	The email address of the employee requesting the report.
Reason for deletion	A valid justification for requesting the deletion.
Add attachments	Option to attach any related files.

5. Select **Submit**.

Result
An HR case is created and the HR task is assigned to an agent belonging to the HR Data Privacy user group to review the request. If the agent approves the request, it's moved to an agent in the HR data privacy compliance approvers user group as an additional approval step before deleting the employee data. Then, the HR data admin can proceed with the deletion and close the HR case.

HR admin can choose to anonymize instead of deleting the employee data. For more information, see Data anonymization.

Alumni can log in to the Alumni Center, go to HR systems and request for the report. For more information, see Using your Alumni Center. In case employees or customers don't have Alumni Center, the agent can create a request on behalf of the alumni.

Case and Knowledge Management reference

Reference topics provide additional information abou the lists and forms that you use to configure and use Case and Knowledge Management.

Components installed with Case and Knowledge Management

Several types of components install with the activation of the Case and Knowledge Management plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Human Resources Scoped app: Core [com.sn_hr_core] plugin activates the sn_hr_core.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only HR admin user by requiring a minimum number (default is two) of active users with those admin roles.

Roles installed

Roles installed with Case and Knowledge Management

Role title [name]	Description	Contains roles
Case and Knowledge Management administrator [sn_hr_core.admin]	Can access and configure Case and Knowledge Management.	• approval_admin • assignment_rule_admin • knowledge_manager • link_generator_writer

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Roles installed with Case and Knowledge Management (continued)

Role title [name]	Description	Contains roles
		• schedule_admin • sn_cd.content_admin • sn_hr_core.content_writer • sn_hr_core.manager • sn_hr_integrations.admin • sn_hr_le.admin • sn_hr_pa.admin (When the PA-Content Pack - HR Scoped App plugin activates.) • sn_hr_sp.admin • sn_hr_sp.hrsp_employee • sn_templated_snip.template_snippet_admin • template_editor_global
HR agent [sn_hr_core.basic]	Grants access to basic HR agents daily work need.	• document_management_user • skill_user • sn_hr_core.case_writer • sn_hr_core.kb_writer • sn_hr_core.profile_writer • survey_reader • sn_hr_core.report_creator
HR case reader [sn_hr_core.case_reader]	Grants access to read all HR cases.	None
HR case writer [sn_hr_core.case_writer]	Grants access to write all HR cases.	• sn_hr_core.case_reader • sn_templated_snip.template_snippet_reader
HR content reader [sn_hr_core.content_reader]	Grants read access to all the table records and their content.	None
HR content writer [sn_hr_core.content_writer]	Grants access to create, update, read, and delete all the table records.	sn_hr_core.content_reader
Alumni employee [sn_hr_core.hrsm_alumni]	Grants role to the employee who has left the company.	None
Contingent employee	Grants role to the employee who works temporary.	None

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Roles installed with Case and Knowledge Management (continued)

Role title [name]	Description	Contains roles
[sn_hr_core.hrsm_contingent]		
Contractor employee [sn_hr_core.hrsm_contractor]	Grants role to the employee who works as a contractor.	None
Full-time employee [sn_hr_core.hrsm_employee]	Grants role to the full-time employee.	None
New hire employee [sn_hr_core.hrsm_new_hire]	Grants role to the employee who is newly hired.	None
HR knowledge writer [sn_hr_core.kb_writer]	Grants access to write all HR KB articles.	None
HR manager [sn_hr_core.manager]	Grants access to all HR cases, profiles, secure information.	• approver_user • catalog • catalog_admin • skill_admin • sn_hr_core.basic • sn_hr_core.secure_info_writer • sn_templated_snip.template_snippet_writer • survey_admin
HR Performance Analytics Admin [sn_hr_pa.admin]	HR Performance Analytics Admin role for the scoped application. • Access and modify the HR PA content packs. • Edits Performance Analytics properties. • Accesses Admin Console. • Launch Dependency Assessment. **Note:** This role is contained in the HR Admin [sn_hr_core.admin] role.	None

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Roles installed with Case and Knowledge Management (continued)

Role title [name]	Description	Contains roles
HR profile reader [sn_hr_core.profile_reader]	Grants access to read all HR Profile records.	None
HR profile writer [sn_hr_core.profile_writer]	Grants access to write all HR Profile records. **Note:** This role also grants write access to the Users (sys_user) table.	sn_hr_core.profile_reader
HR report creator [sn_hr_core.report_creator]	Allows HR agents with the sn_hr_core.basic role to access the HR case [sn_hr_core_case] and task [sn_hr_core_task] tables to create reports.	
HR secure information reader [sn_hr_core.secure_info_reader]	Grants access to read all HR cases, read basic user profile information, read secure user information.	sn_hr_core.profile_reader
HR secure information writer [sn_hr_core.secure_info_writer]	Grants access to write all HR cases, write basic user profile information, write secure user information.	• sn_hr_core.profile_writer • sn_hr_core.secure_info_reader

You can assign these roles to the appropriate roles, groups, or users in your application.

- To assign a role to another role, see Add a role to an existing role.
- To assign a role to a group, see Assign a role to a group.
- To assign a role to a user, see Assign a role to a user.

For further information on user administration and how to manage users, see User administration.

Scheduled jobs installed

Scheduled jobs installed with Case and Knowledge Management

Scheduled job	Description
Auto-close case	Automatically closes HR cases based on the configuration of the HR service for service activity and lifecycle event fulfillment types. This scheduled job runs daily.

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Scheduled jobs installed with Case and Knowledge Management (continued)

Scheduled job	Description
Bulk case creation	Creates bulk cases. This scheduled job runs every six hours.
HR Daily Job	Sends reminder notifications to users based on certain HR task parameters. This scheduled job runs daily.
Migrate HR e-signature tasks	Migrates HR task templates and open HR tasks to the new HR task type for e-signature. Also disables the old HR task types for credential, e-signature, and sign document. This scheduled job runs on an on-demand basis.
Update Client Roles	Updates role assignments for HR profiles that are beginning or ending their employment based on the HR condition table. This scheduled job runs daily. **Note:** The base system assigns the HR Admin (hradmin) user to this scheduled job. If you delete the HR Admin user, ensure that you assign another user with the HR admin (sn_hr_core.admin) role to this scheduled job.

For further information on scheduled jobs and how to use them, see Scheduled jobs.

Tables installed

The * next to a table indicates it was deprecated for customers taking the Rome release to support a new data model. Existing customers using the legacy COEs and tables are not affected. These tables have been replaced by the Employee Relations feature. For more information, see Employee Relations.

Tables installed with Case and Knowledge Management

Table	Description
*Allegation [sn_hr_er_allegation]	Contains information about an allegation type and subtype. **Note:** A non-metadata table.
*Allegation Subtype [sn_hr_core_allegation_sub_type]	Metadata table that provides 59 records to the base system. Allegation subtypes further define an allegation. For example: • Allegation type = Discrimination • Allegation subtypes: Age, disability, Race, and so on.
*Allegation Type [sn_hr_core_allegation_type]	Metadata table that provides base system records. Examples are: • Customer Mistreatment • Discrimination • Drugs and Alcohol

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Tables installed with Case and Knowledge Management (continued)

Table	Description
	• Fraud and Theft • Harassment • Interpersonal Conflict • Misconduct • Retaliation • Wage and Scheduling Issue • Workplace Violence
*Associated Allegation [sn_hr_er_m2m_allegation_party]	Contains information that associates an allegation to subject of allegations. **Note:** A non-metadata table.
Bank Account [sn_hr_core_profile_bank_account]	Bank account table.
Bulk Case Creation Data [sn_hr_core_bulk_case_creation_data]	Bulk case creation data table.
Bulk Case Creation Run [sn_hr_core_bulk_case_creation_run]	Bulk case creation run table.
Case Restriction Configuration [sn_hr_er_case_restriction]	Extends the COE Security Policy [sn_hr_core_coe_security_policy] table.
Certification and License [sn_hr_core_certification_and_license]	Certification and License table.
Client Role Rule [sn_hr_core_client_role_rule]	Client role rule table.
COE [sn_hr_core_coe]	Center of Excellence (COE) table.
COE Configuration Matching [sn_hr_core_coe_config_matching]	Center of Excellence (COE) configuration matching table.
Compensation [sn_hr_core_compensation]	Compensation table.
Compensation Bonus	Bonus compensation table.

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Tables installed with Case and Knowledge Management (continued)

Table	Description
[sn_hr_core_bonus]	**Note:** This table is an extension of the Compensation table.
Compensation Salary [sn_hr_core_salary]	Salary compensation table. **Note:** This table is an extension of the Compensation table.
Compensation Stocks [sn_hr_core_stocks]	Stocks compensation table. **Note:** This table is an extension of the Compensation table.
Corrective Action [sn_hr_er_corrective_action]	Contains information on corrective actions associated with an ER case. **Note:** A non-metadata table.
Direct Deposit [sn_hr_core_direct_deposit]	Direct deposit table.
Employee Relations Case [sn_hr_er_case]	Extends the HR case [sn_hr_case] table. **Note:** A non-metadata table.
HR Beneficiary [sn_hr_core_beneficiary]	HR beneficiary table.
HR Benefit [sn_hr_core_benefit]	HR benefits table.
HR Benefit Plan [sn_hr_core_benefit_provider]	HR benefit plan table.
HR Benefit Type [sn_hr_core_benefit_type]	HR benefit type table.
HR Case [sn_hr_core_case]	HR case table.
HR Benefits Case [sn_hr_core_case_benefits]	HR benefits case table. **Note:** This table is an extension of the HR Case table.

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Tables installed with Case and Knowledge Management (continued)

Table	Description
HR Compensation [sn_hr_core_case_compensation]	HR compensation case table. **Note:** This table is an extension of the HR Case table.
HR Condition [sn_hr_core_condition]	HR condition table.
HR Conditions for Criteria [sn_hr_core_m2m_condition_criteria]	HR conditions for criteria table.
HR Contact [sn_hr_core_contact]	HR contacts table.
HR Corporate Communications Case [sn_hr_core_case_corporate_communcations]	HR corporate communications case table. **Note:** This table is an extension of the HR Case table.
HR Criteria [sn_hr_core_criteria]	HR criteria table.
HR Criteria for Links [sn_hr_core_m2m_link_template]	HR criteria for links table.
HR Disability Benefit [sn_hr_core_disability_benefit]	HR disability benefits table. **Note:** This table is an extension of the HR Benefits table.
HR Disciplinary Issue Type [sn_hr_core_disciplinary_issue_type]	HR disciplinary issue type table.
HR Disciplinary Warning Type [sn_hr_core_disciplinary_warning_type]	HR disciplinary warning type table.
HR Document Acknowledgement [sn_hr_core_document_acknowledgement]	HR document acknowledgement table.
HR Document Template [sn_hr_core_document_template]	HR document template table.
HR Document Type	HR document type table.

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Tables installed with Case and Knowledge Management (continued)

Table	Description
[sn_hr_core_document_type]	
HR Employee Relations Case [sn_hr_core_case_relations]	HR employee relations case table. **Note:** This table is an extension of the HR Case table.
HR Ethics Case [sn_hr_core_case_ethics]	HR ethics case table. **Note:** This table is an extension of the HR Case table.
HR Global Mobility Case [sn_hr_core_case_global_mobility]	HR global mobility case table. **Note:** This table is an extension of the HR Case table.
HR Health Benefit [sn_hr_core_health_benefit]	HR health benefits table. **Note:** This table is an extension of the HR Benefits table.
HR Insurance Benefit [sn_hr_core_insurance_benefit]	HR insurance benefits table. **Note:** This table is an extension of the HR Benefits table.
*HR Investigations Case [sn_hr_core_case_investigation]	HR investigations case table. **Note:** This table is an extension of the HR Case table.
HR Operations Report [sn_hr_core_op_report]	HR operations report table.
HR Operations Report Frequency [sn_hr_core_op_report_frequency]	HR operations report frequency table.
HR Operations Report Type [sn_hr_core_op_report_type]	HR operations report type table.
HR Operations System [sn_hr_core_op_system]	HR operations system table.
HR Operations System to Report Type	HR operations system to report type table.

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Tables installed with Case and Knowledge Management (continued)

Table	Description
[sn_hr_core_op_system_to_report_type]	
HR Payroll Case [sn_hr_core_case_payroll]	HR payroll case table. **Note:** This table is an extension of the HR Case table.
HR PDF Template [sn_hr_core_pdf_template]	HR PDF template table. **Note:** This table is an extension of the HR Document Template table.
*HR Performance Case [sn_hr_core_case_performance]	HR performance case table. **Note:** This table is an extension of the HR Case table.
HR Profile [sn_hr_core_profile]	HR profiles table.
HR Retirement Benefit [sn_hr_core_retirement_benefit]	HR retirement benefits table. **Note:** This table is an extension of the HR Benefits table.
HR Service [sn_hr_core_service]	HR services table.
HR Service Options [sn_hr_core_service_option]	HR service options table.
HR Talent Management Case [sn_hr_core_case_talent_management]	HR talent management case table. **Note:** This table is an extension of the HR Case table.
HR Task [sn_hr_core_task]	HR task table.
HR Template [sn_hr_core_template]	HR template table.
HR Tier Escalation [sn_hr_core_tier_definition]	HR tier escalation table.
HR Total Rewards Case	HR total rewards case table.

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Tables installed with Case and Knowledge Management (continued)

Table	Description
[sn_hr_core_case_total_rewards]	**Note:** This table is an extension of the HR Case table.
HR Visa Category [sn_hr_core_visa_category]	HR visa category table.
HR Workforce Administrator [sn_hr_core_case_workforce_admin]	HR workforce administration case table. **Note:** This table is an extension of the HR Case table.
HRIT Operations Case [sn_hr_core_case_operations]	HRIT operations case table. **Note:** This table is an extension of the HR Case table.
HR Lifecycle Events Case [sn_hr_le_case]	HR lifecycle events case table. **Note:** This table is an extension of the HR Case table.
Interview [sn_hr_er_interview]	Contains information related to ER interviews. **Note:** A non-metadata table.
Involved Party [sn_hr_er_involved_party]	Contains information on involved parties related to the ER case. **Note:** A non-metadata table.
Job [sn_hr_core_job]	Job table.
Job Profile [sn_hr_core_job_profile]	Job profile table.
Language [sn_hr_core_language]	Language table.
Matching Roles [sn_hr_core_matching_roles]	Matching roles table.
PDF Template Mapping [sn_hr_core_pdf_template_mapping]	PDF template mapping table.

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Tables installed with Case and Knowledge Management (continued)

Table	Description
Position [sn_hr_core_position]	Position table.
Relationship [sn_hr_core_relationship]	Relationship table.
Service Activity [sn_hr_core_service_activity]	Service activity table.
Sn HR Core Background Search Details [sn_hr_core_service_activity]	Background check search details table.
Sn HR Core Badge [sn_hr_core_badge]	Badge table.
Sn HR Core Bulk Case Request [sn_hr_core_bulk_case_request]	Bulk case request table.
Sn HR Core Config Case [sn_hr_core_config_case]	HR service-based case configuration table.
Sn HR Core Config Case Creation [sn_hr_core_config_case_creation]	Case creation configuration table.
Sn HR Core Config Case Creation Service [sn_hr_core_config_case_creation_service]	Case creation service configuration table.
Sn HR Core Email Content [sn_hr_core_email_content]	Email content table.
Sn HR Core Substitute Approver [sn_hr_core_substitute_approver]	Substitute approver table.
Topic Category [sn_hr_core_topic_category]	Topic category table.
Topic Detail [sn_hr_core_topic_detail]	Topic detail table.
Tuition Reimbursement [sn_hr_core_tuition_reimbursement]	Tuition reimbursement table.

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Tables installed with Case and Knowledge Management (continued)

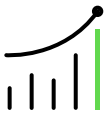
Table	Description
User Fields On Case [sn_hr_core_service_approval_option]	User fields on case table.
Who is covered [sn_hr_core_who_is_covered]	Who is covered table.

For further information on table administration and how to manage data, see Table administration.

Employee Relations

With Employee Relations (ER), handle a sensitive complaint with tighter security. Maintain complete confidentiality and protect the privacy of the user who has raised the complaint.

Get started

Explore  Learn more about Employee Relations	Configure  Plan and configure your implementation	Reporting  Use historical trends and data comparisons for Employee Relations to assess organizational performance.
Use  Use Employee relations to efficiently handle and resolve sensitive cases.	Integration  Integrate with different applications to expand the capabilities and effectiveness of Employee Relations	

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Troubleshoot and get help

- Ask questions and explore other resources for Employee Relations in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Employee Relations

Learn how to use Employee Relations starting from raising a complaint till the closure of ER case.

Following are some of the key features of Employee Relations:

For employees or users

Instill trust and confidence in employees through self service reporting tools such Employee Center or Anonymous Report Center (ARC).

- Ability for a user who is not in the ServiceNow® system to raise a request and receive a full view of the investigation.
- Ability to raise a sensitive complaint anonymously with Anonymous Report Center (ARC).

For an organization

Mitigate risk for your organization when handling employee relation cases.

- Enhanced security verifying that the right people with the right roles and assignment groups have visibility into the ER case.
- Case restricting capabilities such as restricting the view of case to specific ER agents or ER groups or restricting the case view if the ER agent is listed in the involved parties of the case.
- Flexible data model to capture details on involved parties, allegations, allegation subtypes, corrective actions and outcomes.
- End to end investigation flow with capabilities such as evidence management and interview management.
- Assess organizational performance with the Analytics and Reporting Solution that provides you with historical trends and data comparisons for Employee Relations.

End-to-end flow

Workflow steps for handling employee relation cases

Step topic	Description	Persona
Raise a complaint	Raise a complaint using one of the following methods: • **Employee Center** > **Human Resource Catalogs** > **Employee Relations catalog**. • Anonymous Report Center (ARC) (anonymously).	Employee or a user outside the ServiceNow® system.

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Workflow steps for handling employee relation cases (continued)

Step topic	Description	Persona
	An employee relations case is created and assigned to an ER agent.	
Understand the nature of allegation	Get a better understanding about the type allegation that is raised by the complainant. Get details such as allegation type (for example, Fraud and Theft) and allegation subtype (for example, Forgery) from the **Allegation** related tab on the ER case.	ER agent
Review the Involved party list	Get information on the subject of allegation, complainant, or witness from the **Involved Parties** tab on the ER case.	ER agent
Conduct interviews with the involved parties	Schedule one-on-one interviews with the involved parties from the **Interviews** related tab on the ER case. An ER agent can use the interview templates to ask the required questions to the involved parties, and synchronize scheduling with Outlook, and better plan and track interviews.	ER agent
Collect evidence	Add evidences supporting the case resolution. Evidence is any digital artifacts gathered as part of an investigation, like files that are either uploaded to Evidence Management or reside in another system.	ER agent
Taking corrective measures	Indicate the corrective action that has been taken against the subject of allegation, verbal warning or written warning, suspension, or termination.	ER agent

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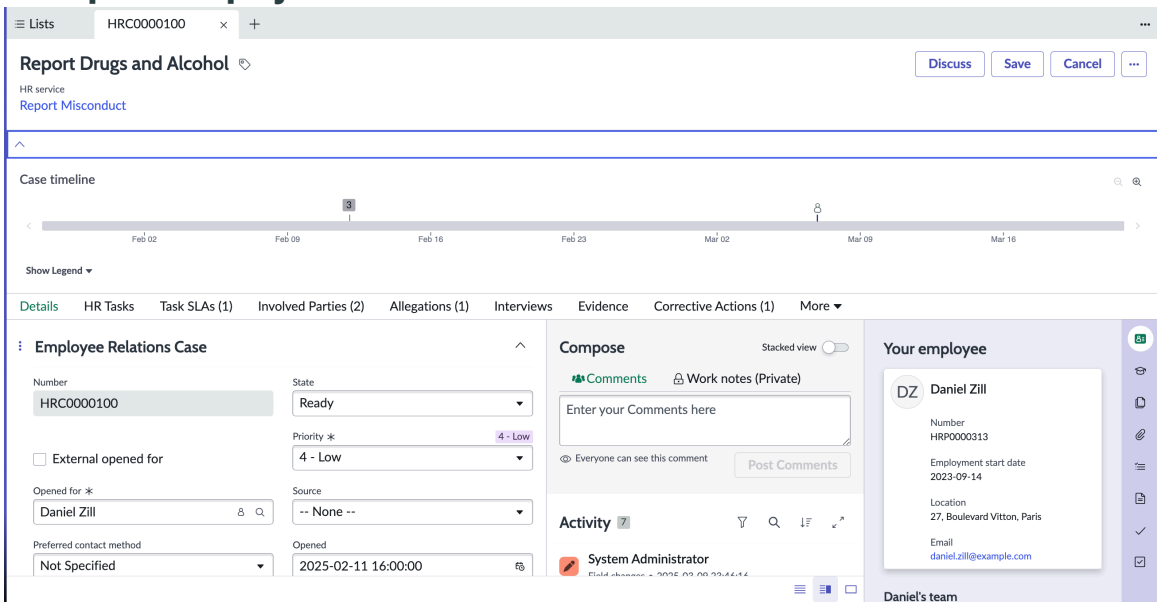
Example of Employee Relations Case



Configuring Employee Relations

Set up HR Service Delivery Employee Relations (ER) so that your agents can engage with your employees, answer questions, create ER cases, create related records, and resolve issues.

To set up ER:

- Activate the required plugins. For more information, see Activate Employee Relations.
- Configure case restrictions. For details on case restrictions, see Employee Relations case restrictions.
- Create a COE security policy. For information on COE security policies, see Create a COE security policy.
- Configure allegation types and subtypes. For more information, see Employee relations allegation types and subtypes.
- Configure assignment rules. For details on assignment rules, see Employee Relations assignment rules.
- Configure matching rules. For more information, see Employee Relations matching rules.
- Set up interview question templates. For information on interview question templates, see Create an interview question template.
- Set up evidence types. For more information, see Create evidence types.
- Configure accommodation types. For more information, see Create accommodation types.
- Configure the activity sets and activities in the Performance Improvement plan (PIP) life cycle event. For more information, see Configure a PIP lifecycle event.

Note: For additional information on tables and roles installed, see Components installed with HR Service Delivery Employee Relations.

Employee Relations catalog items

The base system provides the following ER catalog items:

- Accommodation Request
- Report Discrimination

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- Report Misconduct
- Performance improvement plan (PIP)

Activate Employee Relations

You can activate Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations] if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Role required: admin

About this task

Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations] enables you to create and manage employee relations cases.

Plugins for Human Resources Scoped App: Employee Relations

Plugin	Description
Human Resources Scoped App: Core [com.sn_hr_core]	Enables you to standardize the documentation, interaction, and fulfillment of employee inquiries and requests. **Note:** Employee relations require activation of this plugin, but is a separate scope.
Human Resources Scoped app: Workspace [com.sn_hr_agent_workspace]	A single-pane view that tier 1 agents use to respond to all task types, view the full context of an issue, and get relevant recommendations to resolve issues. **Note:** This plugin is optional for ER.
Evidence Management [com.sn_evidence_management]	Enables you to collect, categorize, retain, and secure evidence for use in ER cases. Evidence that requires gathering and reviewing artifacts for an investigation. This plugin activates when the Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations] is activated, but is reusable with other products and applications.
Interview Templates [com.sn_interview_templates]	Enables you to create reusable interview question templates. Having interview templates provides consistent and efficient interviews for Employee Relation interviews. This plugin also controls read, write, and access to interviews. **Note:** This plugin is optional for ER.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with HR Service Delivery Employee Relations

Several types of components are installed with activation of the Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations] plugin, including tables, and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Roles installed with Employee Relations

Role title [name]	Description	Contains roles
HR ER administrator [sn_hr_er.admin]	Can access and configure HR Service Delivery Employee Relations.	• ER case writer [sn_hr_er.case_writer] • ER configuration manager [sn_hr_er.config_manager]
HR ER case reader [sn_hr_er.case_reader]	Can access and view HR ER cases.	HR case reader [sn_hr_core.case_reader]
HR ER case writer [sn_hr_er.case_writer]	Can access, create, and edit HR ER cases.	• HR case reader [sn_hr_core.case_reader] • HR case writer [sn_hr_core.case_writer]

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Roles installed with Employee Relations (continued)

Role title [name]	Description	Contains roles
HR ER confidential [sn_hr_er.confidential]	Can access locked HR ER cases when locking configuration is activated.	• HR basic [sn_hr_core.basic] • HR case writer [sn_hr_core.case_writer]
HR ER configuration manager [sn_hr_er.config_manager]	Can access, setup, and edit HR ER configuration.	None

Note: Impersonating another user with an ER role is not supported.

Tables installed

HR ER tables installed

Table	Description
Allegation [sn_hr_er_allegation]	Contains information about an allegation type and subtype. **Note:** A non-metadata table.
Allegation Subtype [sn_hr_er_allegation_subtype]	Metadata table that provides 59 records to the base system. Allegation subtypes further define an allegation. For example: • Allegation type = Discrimination • Allegation subtypes: Age, disability, Race, and so on.
Allegation Type [sn_hr_er_allegation_type]	Metadata table that provides base system records. Examples are: • Customer Mistreatment • Discrimination • Drugs and Alcohol • Fraud and Theft • Harassment • Interpersonal Conflict • Misconduct • Retaliation • Wage and Scheduling Issue • Workplace Violence

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HR ER tables installed (continued)

Table	Description
Associated Allegation [sn_hr_er_m2m_allegation_party]	Contains information that associates an allegation to subject of allegations. **Note:** A non-metadata table.
Case Restriction Configuration [sn_hr_er_case_restriction]	Extends the COE Security Policy [sn_hr_core_coe_security_policy] table.
Corrective Action [sn_hr_er_corrective_action]	Contains information on corrective actions associated with an ER case. **Note:** A non-metadata table.
Employee Relations Case [sn_hr_er_case]	Extends the HR case [sn_hr_case] table. **Note:** A non-metadata table.
Interview [sn_hr_er_interview]	Contains information related to ER interviews. **Note:** A non-metadata table.
Interview Question Template [sn_interview_question_template]	Contains information related to the interview question template. Available when the Interview Templates [com.sn_interview_templates] plugin is activated.
Involved Party [sn_hr_er_involved_party]	Contains information on involved parties related to the ER case. **Note:** A non-metadata table.

Employee Relations case restrictions

Use Case Restriction Configuration to determine what groups and agents can access or restrict ER cases.

Groups

Restrict access by Center of Excellence (COE) for specific groups:

- Define what groups can restrict ER cases.
- Define what groups can view ER cases.

The base system provides one case restriction configuration that enables the HR Confidential group to access ER cases.

For more information, see Manage HR Groups.

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Note: When creating case restrictions, be sure that you have at least one configuration that enables you to read these cases.

Roles

Members of groups that can access ER cases must have the sn_hr_er.confidential role.

For more information, see Manage HR roles and Evidence Management for Employee Relations.

COE Security Configuration

Use COE Security Configuration to define group restrictions for a COE and for all or specific HR services under it.

You can then restrict the COE with read and write capabilities.

Note: If you choose to restrict other COEs besides Employee Relations Case [sn_hr_er_case], you can cause performance issues. ER cases numbering more than 100 K can impact performance.

For more information, see Create a COE security policy.

COE security policies are a way to easily restrict access to different COEs via configuration. The underlying COE security policy implementations are ServiceNow ACLs.

Collaborators and the COE for the HR case can conflict. The basic rules are:

- For all HR cases, collaborators override any security on a COE.
- Employee Relations (ER) cases can override collaborators when restrictions apply.

ER assignment rules

Use ER assignment rules to assign a group to an ER case.

For more information, see Employee Relations assignment rules.

ER matching rules

Use ER matching rules to assign an agent that has the least number of cases, the required skills, and matches the location.

For more information, see Employee Relations matching rules.

Configure an employee relations case restriction

Define what groups can view or access employee relations cases using Case Restriction Configuration.

Before you begin
Role required: admin and sn_hr_er.admin

Warning: When creating case restrictions, be sure that you have at least one configuration that enables you to read these cases.

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Case restriction configuration

Procedure

1. Navigate to **All** > **Employee Relations** > **Administration** > **Case Restriction Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

Case Restriction Configuration form

Field	Description
COE	Center of Excellence (COE) that you want to restrict access to. **Note:** For more information on COE, see HR Centers of Excellence data model.
Able to restrict cases	Option to enable members of a group to restrict access to all HR cases for the COE.
Able to view restricted cases	Option that enables a group to view restricted HR cases for the COE.
Application	The application that the case restriction configuration applies to. This field is automatically set to Human Resources: Employee Relations.
Active	Option to activate the case restriction configuration record.

4. Click **Save** or **Submit**.
5. Add the groups that you want the case restriction configuration to apply to.

Note: You can also restrict by role. Agents with the sn_hr_er.confidential role can access restricted ER cases.

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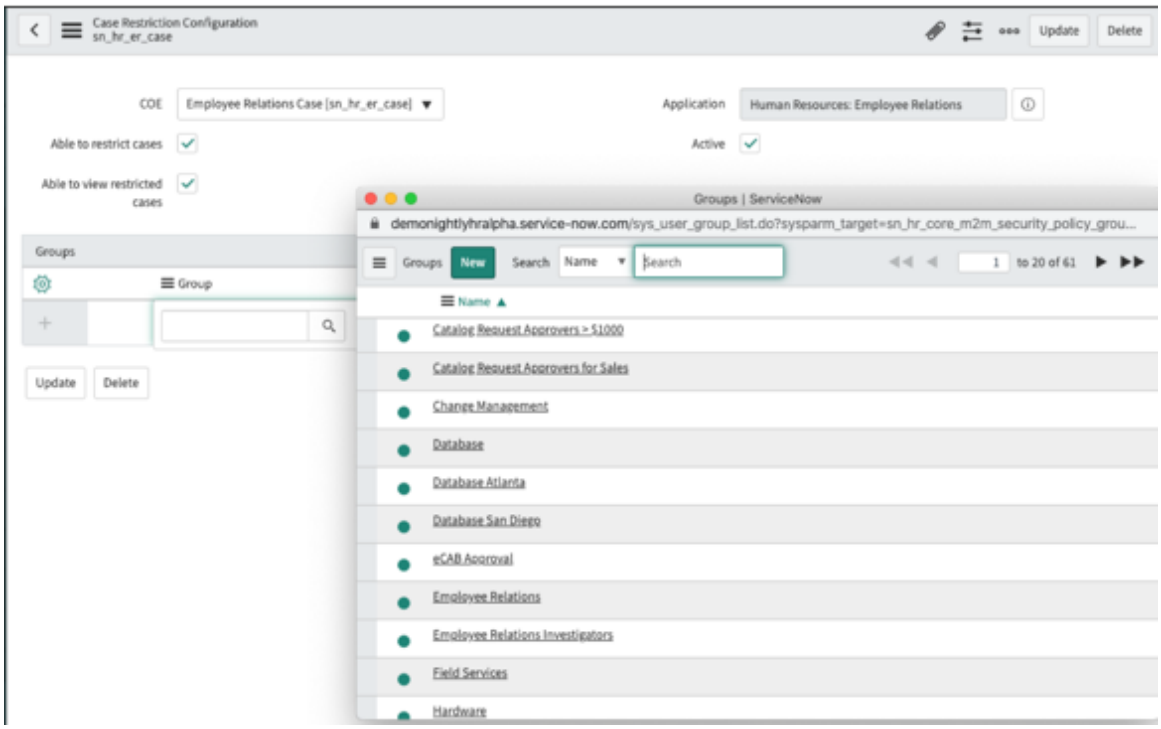

6. Click **Update**.

Note: Collaborators on an HR or ER case can override COE security. But, ER cases with restrictions override collaborators. For more information, see Create COE security.

COE security policies are a way to easily restrict access to different COEs via configuration. The underlying COE security policy implementations are ServiceNow ACLs.

What to do next

Case restriction configuration enables the HR confidential group members to restrict a case using the **Restrict** button available on the case. When a case is marked as Restricted only the members in the HR confidential group can view the ER case.

HR for HR Security

Even Employee Relations agents with privileges to view and modify an ER case are limited from viewing, modifying, or restricting and ER case under certain circumstances for security purposes.

Restrictions are enabled for the Employee Relations agent in the following areas of the ServiceNow instance:

Limited access

When an ER agent is **Subject Person**, or **Opened for**, or **Complainant** on the ER case:

View

Can view only the self-service view of the ER case on Agent Workspace, the platform view, and the Employee Center that are available to regular employees. The agent cannot change the view.

UI actions

Actions on the ER case that are available to regular employees are also available to the ER agent.

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Access to related lists and records

No access to the related lists and related records for an ER case, for example, allegations, involved parties, interviews, evidence, and so on. The agent cannot access the related records in the platform view.

Access to Tasks

Can view only the assigned tasks and not tasks assigned to other employees.

No access

When an ER agent is either **Subject of Allegation**, or **Witness** on the ER case, the ER agent will not have any access to that ER case.

Create a COE security policy

Use **COE Security Configuration** to define group restrictions for a COE and for all or specific HR services under it.

Before you begin

Role required: admin, sn_hr_er.admin
Certain users will be able to access a COE even it is restricted. For example, Opened for, Opened by, Watch List and Collaborators get access to a restricted COE irrespective of its security policies.

COE security policies are a way to easily restrict access to different COEs via configuration. The underlying COE security policy implementations are ServiceNow ACLs.

Procedure

1. Navigate to **All** > **HR Administration** > **COE Security Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

COE Security Policy form

Field	Description
Policy name	Name that you want to give to the security policy that is created for the Center of Excellence (COE).
COE	Center of Excellence (COE) that you want to create a security policy for. **Note:** The COEs that appear depend on the Application selected.
Applies to all services	Option to apply all HR services for the COE security policy.
Applies to all child COEs	Option to apply the security policy on child COEs of the parent COE.
Short description	More information about the security policy that is created for the Center of Excellence (COE).
Services	HR service that the COE security policy applies to.

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Field	Description
	This field appears only if the **Applies to all services** check box is not selected.
Application	Application that the COE security policy applies to.
Active	Option to indicate the active status of the COE security policy. Only active security policies are applied.
Type	Access that you want your HR agents to have for the cases that fall under the COE or HR services. Valid values: ○ **Read** ○ **Write**
Applies when	Condition statement that filters an HR case. If the HR case matches the conditions, the COE security policy applies to it. You can create conditions based on key words or fields from the HR case. When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global. **Note:** An empty filter condition matches all records for the selected COE.

4. Click **Save** or **Submit**.
5. Add the groups that you want the COE security policy to grant access to.

   Note: Leave this list blank to ensure no groups have access through the COE security policy.

6. Click **Update**.

HR services for Employee Relations

List of default HR services for Employee Relations.

Default HR services

HR service	Description
Accommodations Request	Service for employees requesting an accommodation or modification to a working arrangement.

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Default HR services (continued)

HR service	Description
Anonymous Discrimination	Service to report any discrimination observed at work to the HR team anonymously.
Anonymous Report Misconduct	Service for employees to report misconduct or inappropriate behavior to HR anonymously
Performance improvement Plan (PIP)	Service to manage employee performance issues.
PIP Assessment	Service to manage employee PIP assessment issues
Report Discrimination	Service for employees to report discrimination or inappropriate behavior to HR.
Report Misconduct	Service for employees to report misconduct or inappropriate behavior to HR.
Declining performance	Service to assign a task to the manager where the manager mentions the employee name and performance issue.
PIP status report	Service that automatically creates a draft document which the employee has to sign during Performance Improvement Plan.

Employee relations allegation types and subtypes

Allegation types and subtypes help you further define an employee relations case.

An allegation is a high-level category and allegation subtype provide more details about the allegation. For example, **Allegation** can be **Fraud and Theft** and **Allegation Subtype** can be **Forgery**. Allegation types and subtypes are attached to an HR Service Delivery ER case and are the foundation for the case.

The base system provides allegation types and subtypes that you can use immediately.

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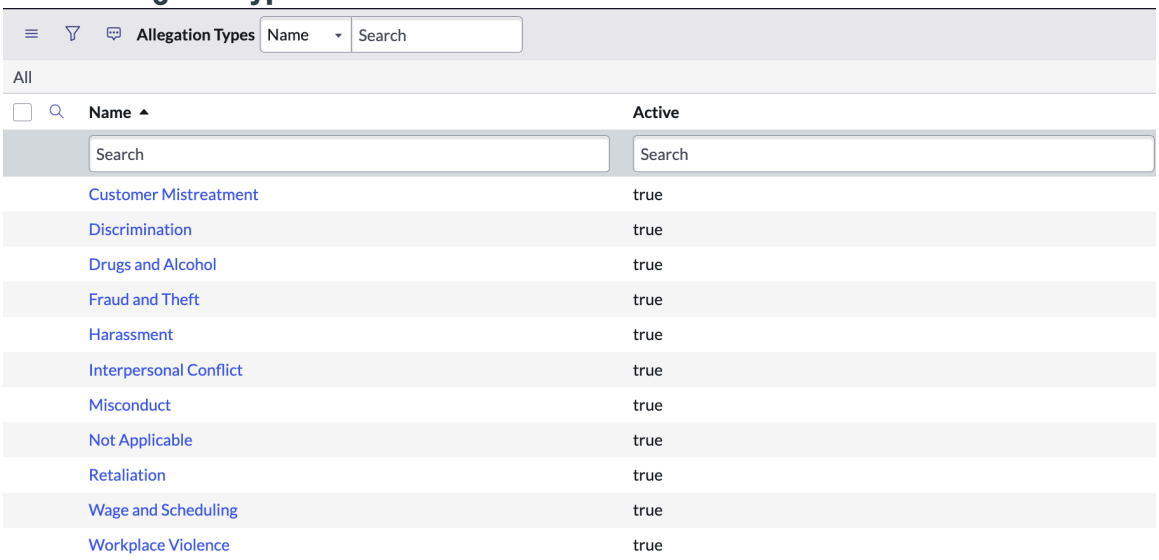
Default Allegation types

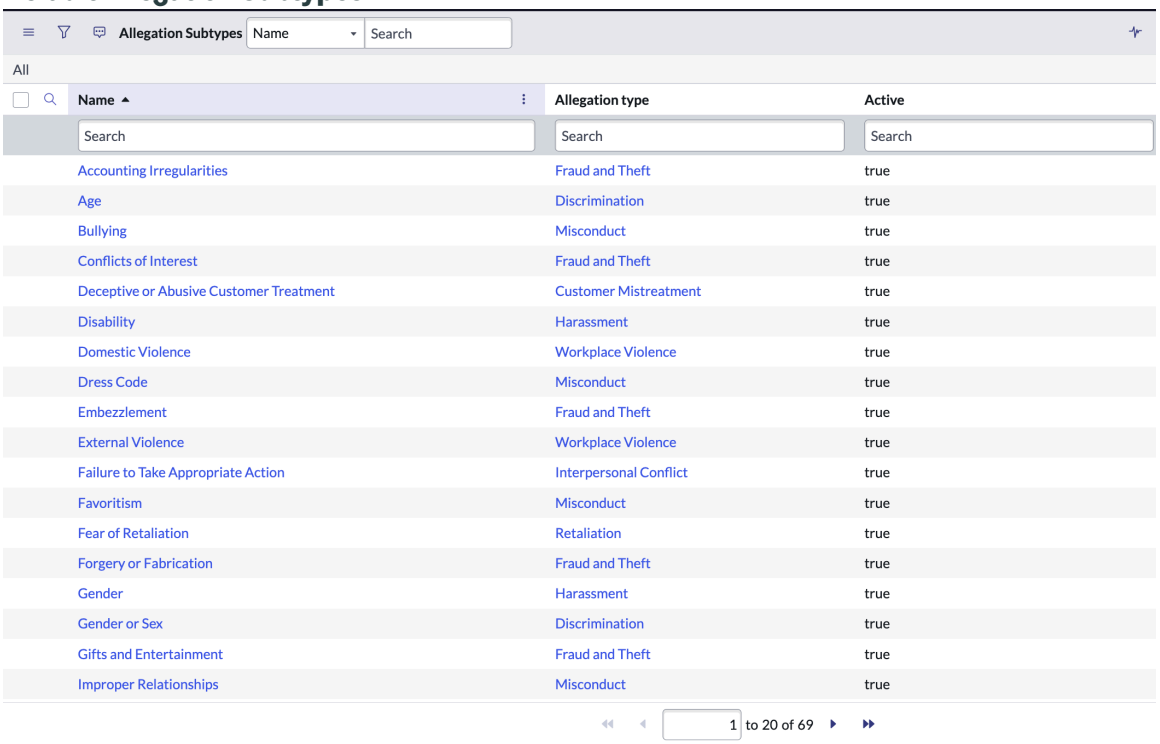


Allegation Types | Name | Search

All

Name	Active
Search	Search
Customer Mistreatment	true
Discrimination	true
Drugs and Alcohol	true
Fraud and Theft	true
Harassment	true
Interpersonal Conflict	true
Misconduct	true
Not Applicable	true
Retaliation	true
Wage and Scheduling	true
Workplace Violence	true

Default Allegation Subtypes



Allegation Subtypes | Name | Search

All

Name	Allegation type	Active
Search	Search	Search
Accounting Irregularities	Fraud and Theft	true
Age	Discrimination	true
Bullying	Misconduct	true
Conflicts of Interest	Fraud and Theft	true
Deceptive or Abusive Customer Treatment	Customer Mistreatment	true
Disability	Harassment	true
Domestic Violence	Workplace Violence	true
Dress Code	Misconduct	true
Embezzlement	Fraud and Theft	true
External Violence	Workplace Violence	true
Failure to Take Appropriate Action	Interpersonal Conflict	true
Favoritism	Misconduct	true
Fear of Retaliation	Retaliation	true
Forgery or Fabrication	Fraud and Theft	true
Gender	Harassment	true
Gender or Sex	Discrimination	true
Gifts and Entertainment	Fraud and Theft	true
Improper Relationships	Misconduct	true

1 to 20 of 69

You can also create allegation types and subtypes based on your business needs. See Configure an employee relations allegation type.

Configure an employee relations allegation type

Create allegation types and subtypes to help provide details on an employee relations case.

Before you begin

Role required: sn_hr_er.config_manager

Procedure

1. Navigate to **All** > **Employee Relations** > **Administration** > **Allegation Types**.
2. Click **New**.

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3. On the form, fill in the fields.

Allegation Type form

Field	Description
Name	Description of an allegation. An allegation is a high-level category and allegation subtypes can provide details of the allegation. For example, harassment can be an allegation. Subtypes can be: ○ **Bullying** ○ **Insubordination** ○ **Profanity**

4. Click **Save**.
   The Allegation Subtypes related list appears.
5. Click **New**.
6. On the form, fill in the fields.

Allegation Subtype form

Field	Description
Name	Description of allegation subtype. Subtypes help define the allegation type.
Allegation type	Enter a description of an allegation subtype. For example, harassment can be an allegation. Subtypes can be: ○ **Bullying** ○ **Insubordination** ○ **Profanity**

7. Click **Submit**.

Employee Relations assignment rules

HR Service Delivery employee relations assignment rules allow you to automatically assign a group to ER cases when the assignment group is empty.

When the HR case template sets the assignment group, assignment rules are ignored.

When an ER case is created, it:

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- Checks for the Skills/Assignment group from the HR Case Template for the associated HR service. See Configure an HR case template for an HR service.
- If there is no assignment group for the HR case template, the base system provides the Employee Relations Case assignment rule.
- The Employee Relations Case assignment rule assigns the Employee Relations group to the case.

Note: For more information, see Add or modify an HR assignment rule.

Employee Relations matching rules

Because ER cases do not use a subject person, matching rules try to find an agent with the required skills and in the same country where the case was opened to determine case assignment.

Matching rules look for:

- Country the ER case was opened in.
- If no country is available, find any involved parties with a type of complainant and use their country.
- If there are no involved parties with type of complainant, look for involved parties with type of subject of allegation and use their country.
- If there are no involved parties with a country that can be used, then only skills are used.

Note: For more information, see Add or modify a matching rule.

You can restrict an ER case to be assigned to only members of a specific group. See Configure an employee relations case restriction.

Employee Relations accommodations

Accommodation requests are from your employees requesting changes related to their work situation.

Examples of accommodations are:

- Provide new equipment
- Job restructuring
- Leave
- Reader or interpreter services
- Reassignment
- Scheduling changes
- Workplace modification
- Workplace policies

You can associate an accommodation request with an HR case and start and end dates when the accommodation is temporary.

Agents can create more than one accommodation request per ER case. This is useful when an employee open an accommodation request for a single situation, but HR might have more than one classification for an accommodation. Some accommodation requests might require approval or have different start and end dates.

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You can use HR service fulfillment types to define any workflow required to review, approve, and deliver accommodations like any HR case. For more information, see Configure an HR service.

Create accommodation types

Accommodation types help define and categorize accommodation requests.

Before you begin
Role required: sn_hr_er.config_manager

Note: The base system provides accommodation types, but you can add more.

Procedure

1. Navigate to **All** > **Employee Relations** > **Accommodation Types**.
2. Select **New**.
3. Fill in the form.

Accommodation types form

Field	Description
Name	Name that describes the accommodation type.
Active	Indicates if the accommodation type is available and ready to use. **Note:** The base system provides accommodation types that you can use. The base system delivers these types as inactive. Ensure you select **Active** for the accommodation types you want to use
Application	The scope application you are in when creating the accommodation type.

4. Select **Save** or **Submit**.

Interview Management for Employee Relations

Use Interview Management to create templates to capture questions, answers, and notes in a consistent and efficient way, sync scheduling with Microsoft Outlook, and better plan and track your interviews.

Setting up Interview Templates

Set up HR Service Delivery Interview Templates so your agents can quickly, consistently, and accurately capture appropriate information.

Activate the Interview Templates plugin (com.sn_interview_templates) for the ServiceNow AI Platform if you have the admin role. For more information, see Activate Interview Templates.

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- Create interview question templates.
- Create interview template tags. Tags help you filter your interview question templates so you can easily browse for relevant questions to use in an interview. For example, agents ask different questions depending on who they are talking to and what the specific allegations are. Template tags help agents to find the appropriate interview template.

Roles installed

Role	Description	Contains roles
Interview questions template admin [sn_interview_temp.admin]	Can access, read, create, and edit interview question templates, template tags, and Employee Relations properties.	sn_interview_temp.reader, sn_interview_temp.writer
Interview questions template writer [sn_interview_temp.writer]	Can access, read, create, and edit interview question templates and template tags.	sn_interview_temp.reader
Interview template reader [sn_interview_temp.reader]	Can access and read interview question templates and template tags.	N/A

System properties

The **sn_interview_temp.filter_attr_allowed_tables** system property determines the tables you are allowed to create interview template tags for interview question templates.

When entering multiple tables, separate the table names with a comma (,) but with no space between each table.



Template tags

Template tags are a way to organize your interview templates and a way to filter them when looking for the correct template. Template tags allow you to find relevant questions easier and faster.

From the legacy UI, you can select the **Questions** button to show all interview templates. The template tags appear at the bottom of each interview template displayed.

In the HR Service Delivery Agent Workspace, the template tag appears at the bottom.

There are two types of template tags you can create:

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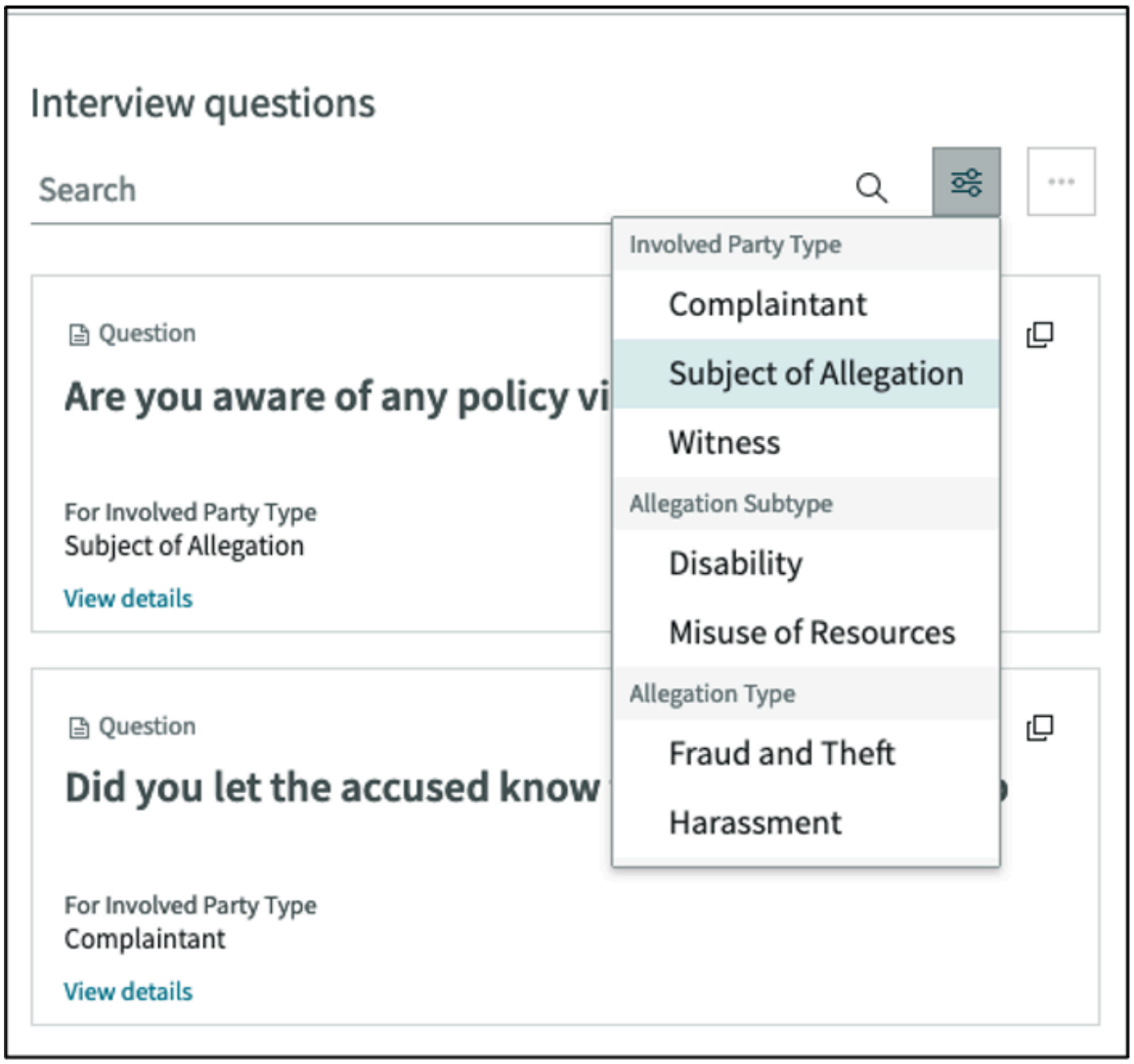
- Referenced: Uses the fields from the following tables to create reference tags:
  - Allegation Subtype [sn_hr_er_allegation_subtype]
  - Allegation Type [sn_hr_er_allegation_type]
  - HR Service [sn_hr_core_service]
- Custom: You create you own interview template organization. For example:
  - Customer category = Involved party type
  - Custom tags:
    - Complainant
    - Subject of allegation
    - Witness



Involved party type becomes the top-level category in the organization with the tags being a way to organize the type of person you are interviewing.

Activate Interview Templates

You can activate the Interview Templates plugin (com.sn_interview_templates) for the ServiceNow AI Platform if you have the admin role.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Interview Templates plugin (com.sn_interview_templates) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Create an interview question template

Interview Question Templates provides your agents with a consistent and efficient way to capture answers from interviews.

Before you begin

Role required: sn_interview_temp.admin

Procedure

1. Navigate to **All** > **Employee Relations** > **Interview Question Templates**.
2. Select **New** or an existing interview question template.
3. Fill in the form or make edits.

Field	Value
Active	Option for enabling the **Interview Question Template** and make it available.
Name	The name that identifies the interview ques tion template.
Application	The application the interview question tem plate belongs to. **Note:** The application that appears is dependent on your current application scope. For more information, see Appli
Table	Name of the table the interview question tem plate is associated with.

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Field	Value
	Note: To only show interview question templates for ER interview records, se lect the Interview (sn_er_interview) ta ble. If you leave this field blank, the inter view template is available globally (any tables that have been configured to use interview templates also have access). Currently in the base system, only Em ployee Relations interviews are set up to access.
Question template body	List of questions related to the type of inter view. Interview question templates support rich text.

4. Select **Save**.
   The **Template Tags** related list appears. In order to filter your interview templates, you must associate the interview template with a template tag.

   Note: For more information on **Template Tags**, see Create an interview template tag.

Create an interview template tag

Create template tags you can use to filter interview question templates on pre-defined attributes. Template tags allow you to find relevant questions easier and faster.

Before you begin

Role required: sn_interview_temp.admin

Interview template tags drive the filtering interaction for an agent as a way to browse or search for a template.

Procedure

1. Navigate to **All** > **Interview Templates** > **Template Tags**.
2. Select **New**.
3. Fill in the form.

Template Tag form

Field	Description
Tag type	The category of tag you are creating. The choices are: ○ Referenced: Select to create tags related to a specific table. The tables that appear depend on the entries in the **sn_interview_temp.filter_attr_allowed_tables** system property. For more information, see Setting up Interview Templates.

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Field	Description
	Note: When you have multiple applications that use **Interview Question Templates**, using **Referenced**, can keep your interview question templates separate. Associating a tag with a table helps your users filter for interview question templates faster and easier. ○ Custom: Select to create tags that are free-form text and referenced by a custom category.
Table	The table associated with a interview template tag. The tags you select are from the table you select. You can associate one of the following tables: ○ Allegation Subtype [sn_hr_er_allegation_subtype] ○ Allegation Type [sn_hr_er_allegation_type] ○ HR Service [sn_hr_core_service] This field only appears whe you select **Referenced** from the Tag type field.
Custom category	The category that your custom tag belongs to. Ensure you have mapped out your structure before creating. Having a clear organization of your tags and categories makes searching for specific questions faster. This field only appears when you select **Custom** from the **Tag type** list.
Custom tag	The tag you want to associate with a question interview template. Enter a custom tag associated with the Custom category to create a hierarchy with custom category as the top of the hierarchy and tags under it. For example: ○ Customer category = Involved party type ○ Custom tags: ▪ Witness ▪ Complainant ▪ Subject of allegation Involved party type becomes the top-level category in the organization with the tags

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Field	Description
	being a way to organize the type of person you are interviewing.
Application	The application scope you are currently in and associated with the interview template tag.
Domain	The domain your current scope is associated with. This field applies to customers that have multiple domains. For more information, see Domain Separation and HR Service Delivery.

4. Select **Save** or **Submit**.

Evidence Management for Employee Relations

Use Evidence Management to capture and categorize evidence for Employee Relations or related cases.

Evidence is defined as any digital artifacts gathered as part of an investigation, like files that are either uploaded to Evidence Management or reside in another system.

Setting up Evidence Management

Set up HR Service Delivery Management so your agents can collect evidence and information related to Employee Relation (ER) cases.

You can activate Evidence Management [com.sn_evidence_management] plugin if you have the admin role. This plugin activates when the Human Resources Scoped App: Employee Relations [com.sn_hr_employee_realtions] plugin is activated. For more information, see Activate Employee Relations.

Roles

The following roles are installed with the Evidence Management [com.sn_evidence_management] plugin:

Roles installed with Evidence management

Role title [name]	Description	Contains roles
Evidence admin [sn_em.admin]	Can access and configure all areas within Evidence Management.	• sn_em.evidence_config_manager • sn_em.evidence_reader • sn_em.evidence_writer
Evidence Configuration manager [sn_em.evidence_config_manager]	Can access, create, and manage evidence type records. **Note:** requires the evidence reader and writer roles to manage the evidence type records.	

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Roles installed with Evidence management (continued)

Role title [name]	Description	Contains roles
Evidence reader [sn_em.evidence_reader]	Can view evidence if the ER case is accessible.	
Evidence writer [sn_em.evidence_writer]	Can create and manage evidence records.	sn_em.evidence_reader

Employee Relations roles include Evidence Management roles.

Users are unable to read evidence when impersonating.

When an Employee Relations case is restricted, users can only view the evidence record if they can view the ER case.

Evidence types

Before you can add evidence to an ER case, you must set up evidence types. Evidence types help you categorize and organize the evidence you collect related to ER cases. The base system provides:

- Audio
- Chat logs
- Email
- Photos
- Screenshots
- SMS
- Video

You can create additional evidence types. For more information, see Create evidence types.

Create evidence types

Create evidence types to catalog and organize employee relation evidence in an efficient and logical way to enhance your business processes.

Before you begin

Role required: sn_em.evidence_config_manager

Note: The base system provides preconfigured evidence types.

Procedure

1. Navigate to **All** > **Evidence Management** > **Evidence Types**.
2. Select **New**.
3. Fill in the form or edit the fields.

Field	Value
Name	The name that identifies and describes the evidence type.

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Field	Value
Active	Indicates if the evidence type is active and available for use.

4. Select **Submit**.

Configure a PIP lifecycle event

After a PIP request is initiated by a manager, a structured workflow (a predefined lifecycle event) auto-initiates tasks for a manager, an employee, and an ER agent.

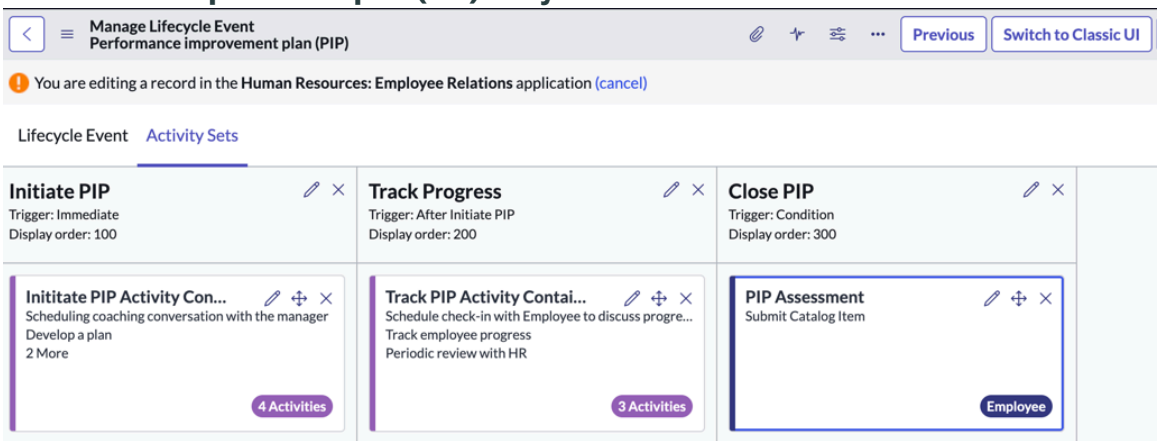
Before you begin

- Role required: admin
- Install the Human Resources Scoped App: Employee Relations, and Enterprise Onboarding and Transitions plugins.
- Activate the HR Taxonomy, and Document Templates applications from ServiceNow Store.

Procedure

1. Navigate to **All** > **Lifecycle Events** > **Administration** > **Manage Lifecycle Events**.
2. Open the Performance Improvement plan (PIP) life cycle event with predefined activity sets and activities.

Performance Improvement plan (PIP) lifecycle event



3. Configure the activity set and activities as per your business use case.

Using HR Service Delivery Employee Relations

Creating an HR Service Delivery Employee Relations (ER) case is similar to creating any HR case with some differences.

The process for working ER cases are:

- Create an ER case using the Case Creation form in Core UI or the Create a new case form in Agent Workspace for HR Case Management.
- After case creation, add:
  - Involved Parties
  - Allegations
  - Interviews

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- Evidence
- Corrective Actions
- Accommodations

COE and HR service

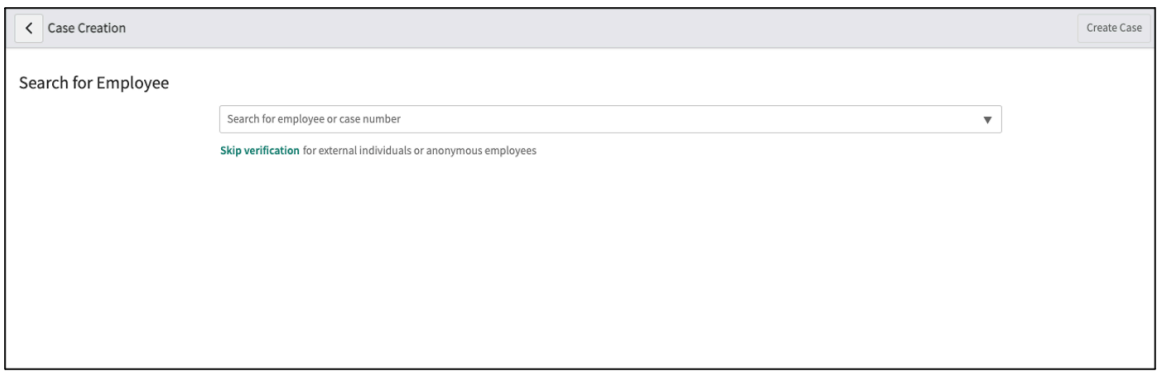
HR Service Delivery supports the Employee Relations Case COE.

And it supports the following HR services: Report Misconduct and Accommodation Request.

Opened for is not an employee

When creating HR cases, you must identify an Opened for person. For ER cases, you are not required to identify the Opened for person.

If you are an HR agent and using the HR case form or Agent Workspace, select **Skip verification** from the Case Creation Search for Employee form



Related information

After opening an ER case, related information provides the details of an ER case and includes:

- Allegations
- Involved Parties
- Interviews

Allegations

Allegations provide additional details about the misconduct and includes:

- Allegation type
- Description
- Involved parties

Involved Parties

As part of capturing important information about the misconduct, you can capture information about anyone involved. Information like the type of involved party. Is the involved party a:

- Witness
- Complainant

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- Subject of allegation
- Other

Or, is the involved party a user in the system or not a user.

Interviews

Interviews from all related parties are important and captures the following information:

- The interview date
- Names of the interviewers
- Name of the person being interviewed
- Any people you want to link to the investigation
- Notes on the interview

Employee using Employee Center (EC) or Service Portal

When an employee creates an ER case from the Employee Center (EC) or Service Portal, the Opened for, Opened by, and Complainant are assigned to the employee.

Note: A role is not required for employees to create an ER case.

- Agents that can work an ER case must have the HR ER case writer [sn_hr_er.case_writer] role.
- When creating an HR ER case, for employees that do not have the HR ER case writer [sn_hr_er.case_writer] role, the Opened for field does not appear.
- When an agent with the HR ER case writer [sn_hr_er.case_writer] role opens the case, the Opened for field does not appear.

Use Guided Tours in Employee Relations

Use guided tours in Employee Relations to get an overview of Employee Relations cases.

Before you begin
Role required: admin,sn_hr_er.case_writer,sn_hr_er.case_reader

About this task
Guided tours help train and onboard users within the workspace. Each tour is designed to provide an overview, guide you through a task, or complete a process. If needed, administrators can create more tours. For more information, see Guided Tours.

When you visit a page that has a guided tour for the first time, a welcome screen appears. You can choose to either begin the tour or skip the tour. The tour can be revisited from the Help Center menu.

Guided tours in Employee Relations are only available in report misconduct cases. The tour is inactive by default. To enable the guided tour, see Enable guided tours in Employee Relations.

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select the **Lists** icon ( ).
3. Select an ER case.

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4. Select the **Show help** icon ( ).
5. **Optional:** Select the **Pin Help Center menu** icon to pin the Help Center side panel on the page.
6. Select **Take a Tour**.
7. Take the necessary action and select **Next** to progress through the tour.
   For ending the tour at any point, you can select **End Tour** in the side panel or select the **Close** button in the pop-up window and confirm to end the tour.
8. Select **Done** after the tour is ended.

Enable guided tours in Employee Relations

Enable guided tours in Employee Relations to get an overview of Employee Relations cases.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Guided Tour Designer** > **Guided Tours**.
2. Select the **Tour ID** beside **Details View of Employee Relations Case**.
3. Select the **Active** check box.
4. Select **Update**.
5. Configure Auto Launch for the Employee Relations guided tour.
   a. Navigate to **All** > **Guided Tour Designer** > **Configure Auto Launch**.
   b. Select the **now/hr/agent/record** tile.
   c. Select the **Auto Launch** toggle beside **Details View of Employee Relations Case** so it switches to the right.

Create an Employee Relations case in Core UI

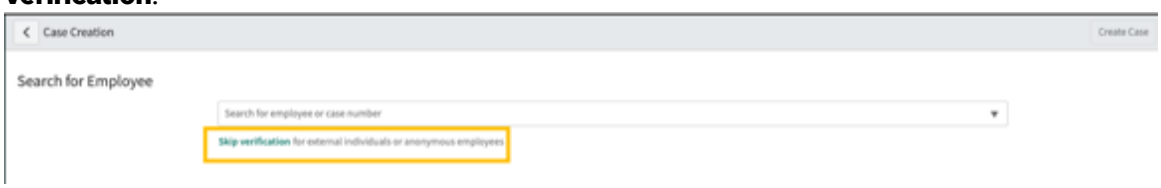
You create ER cases for employees that wish to report misconduct, discrimination or a disciplinary issue.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Create New Case**.
2. From **Search for Employee or case number**, enter an employee name or click **Skip verification**.



Note: Skipping verification enables you to create an ER case without identifying an Opened for person and takes you directly to case details.

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Case Details form

Field	Description
COE	The **Center of Excellence** associated with the HR case you are creating. Currently, Employee Relations Case is the only COE available for ER cases. Selecting a COE filters the choices for HR service. See HR Centers of Excellence data model. **Note:** You can also select an HR service first and the associated COE automatically populates.
HR service	The HR service depends on the COE selected or what you select based on communication with the employee request. Select: ○ Accommodation Request ○ Report Discrimination ○ Report Misconduct ○ Performance improvement plan(PIP) HR services available to an employee filter by: ○ COE selected. ○ HR criteria for the **Subject person** based on the HR service configuration. Limit services filter on the **Case Creation Configuration** form. If the HR service field is empty, ensure that you did not remove the Opened for field. **Note:** **Bulk Parent Case** does not appear as a selection because it only appears when creating a parent case for child bulk cases. Refer to Add or modify bulk HR cases.
Opened for	The person the HR service request is for. **Note:** This field does not appear if you selected the **Skip verification** link. Click the **Lookup using list** icon to find a user. Use the choice list to search and select another employee. Click the **Reference field** icon to view or edit **HR profile** information.

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Field	Description
	Note: Selecting the **Do Not Default Subject Person** HR Service Option for an HR service, prevents the **Subject Person** from automatically filling in when creating an HR case. For more information, see Configure an HR service.
Work notes	Information specific to the case that can help other HR agents. **Work Notes** are not visible to the **Opened for** subject. The sn_hr_core.restrict_guest_email system property allows a user to send an email from a personal email account referencing an HR case. When the property has a value of false (default), the text from the email appears in the Work notes field. To access system properties, enter `sys_properties.list` in the navigation filter. **Note:** Translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.

3. Click **Create Case** and the **Employee Relations Case** form appears with additional information about the case.
   The **COE** and **HR service** selected for the HR case determines the fields that appear.

Employee Relations Case form

Field	Description
Number	An HR case number is assigned and is a unique identifier, cannot be changed, and has an HRC prefix.
External opened for	The ER case was reported by somebody outside of your company. Checking this box removes the following fields: ○ Opened for ○ Preferred contact method
Opened for	The person who is responsible for the HR service request. **Note:** Select **Skip verification** to create a case without verifying the employee or case number. ○ The person requesting the HR service. When you make an HR service request for yourself, the **Subject person** and **Opened for** person are the same.

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Field	Description
	○ The person requesting the HR service on behalf of an employee. For example, a manager requesting an HR service for a direct report. In this example, the manager (**Opened for**) made an HR request on behalf of an employee (**Subject person**). Use the choice list to search and select another employee. Click the **Reference field** icon to view or edit **HR profile** information.
Preferred contact method	The communication method the **Opened for** person (if applicable) prefers to be contacted. Select: ○ Not Specified ○ Personal Phone ○ Work Phone ○ Personal Email ○ Work Email
HR service	The HR service selected in the Case creation form.
Incident date	The date of the incident. If there are multiple incidents, select the date of the most recent incident.
Skills	The required skills of the person assigned to this category of HR case. Skills can auto-populate based on the HR case template associated with the HR service.
State	Status of the case. The state can auto-populate based on the HR case or task template associated with the HR service. ○ Draft: The default state for a case when it is first opened. **Note:** Can only be changed to Ready, Closed Complete, Closed Incomplete, Cancelled, or Suspended. ○ Ready: The case is ready to be worked on. ○ Closed Complete ○ Closed Incomplete ○ Cancelled ○ Suspended: Use to temporarily prevent violation of a service level agreement (SLA). Refer to Suspend and resume an HR case.

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Field	Description
Priority	The priority that the incident needs resolution. Use impact and urgency to determine the priority.
Source	The reporting method the incident
Opened	The date and time the ER case was created.
Opened by	The person who created the ER case.
Assignment group	The group the ER case is assigned to. If the group is not set automatically, assign an HR group to provide a selection of HR users in the **Assigned to** field. For automatic assignment, refer to Employee Relations assignment rules.
Assigned to	The user assigned to work on this case. When a group is automatically assigned, a user from the group is automatically assigned when the case is created. If the user is not auto-assigned, click the **Lookup using list** icon to select a user who is a member of the selected assignment group. To change the **Assigned to** HR agent, the agent must be a member of the Assignment group.
Collaborators	Agents or interested parties you want to associate with the case. Collaborators can track and stay up-to-date on the progress of the ER case. If an ER case transfers from the assigned to agent to another agent, the original assigned to agent can add themselves as a collaborator and still monitor the case. By having visibility to the case, collaborators can also help the assigned to agent with the case. Other factors: ○ Collaborators can remove themselves from the case. ○ The Assigned to agent can add or remove collaborators. ○ Collaborators cannot add or remove collaborators. ○ Notifications are sent to the collaborators when added to the ER case.

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Field	Description
	Collaborators and the COE for the HR case can conflict. The basic rules are: ○ For all HR cases, collaborators override any security on a COE. For more information, see Create COE security. ○ Employee Relations (ER) cases can override collaborators when restrictions apply. For more information, see Configure an employee relations case restriction. **Note:** Agents must have the ER case writer [sn_hr_er.case_writer] role in order to be a collaborator.
Watch list	Interested parties that can view all updates and receive notifications for the ER case.
Short description	Populates from the HR service. After the case is created, you can modify the description.
Description	A longer, detailed description after the ER case is created. Use the Rich Text Format (RTF) tools to format your text. Rich text formatting also appears for a case or task description on the Employee Center or service portal.

The following buttons appear:

Discuss

Option to begin a sidebar discussion on the case by adding the required participants.

Follow

Option to get notified of any comments or work notes on the case, according to your notification settings.

Update

Option to update the case.

Ready for work

Option to change the status of case to Ready for work.

Cancel

Option to cancel the case.

Delete

Option to delete the case.

The following embedded lists appear:

Fulfillment Instructions

Information on how to complete the case. This information is defined in the HR Service configuration.

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A checklist outlining the exact steps to complete appears when configured by the HR service. See Configure an HR service.

Comments and Work Notes

Comments or work notes that provide details about the case. **Work notes** are not visible to the **Subject person**.

Note: Translate the text in your preferred language using the **Translate** option. For configuring the dynamic translation framework, see Dynamic translation.

Related Links

The following appear dependent on the type of case and roles associated with the user:

- Add Task: Task you want to add to the case. Refer to Add an HR task to an HR case.
- Show SLA Timeline: The SLA in timeline format that shows elapsed time.
- Repair SLAs: Click to repair any service level agreements associated with the case.

Involved Parties

People associated with the ER case. Involved parties can be the complainant, subject of the allegation, a witness, or other (undefined). For more information, see Create an involved parties record.

Allegations

Information that further defines an employee relations case. For more information, see Create an allegation record.

Interviews

Interview record for an involved party. For more information, see Schedule an interview in Employee Relations using the legacy UI.

Evidence

Evidence to support the ER case. For more information, see Evidence Management for Employee Relations.

Corrective Actions

Information about the resolution and any associated corrective actions after an investigation related to the ER case. For more information, see Create a corrective action.

Attached Knowledge

List of knowledge articles attached to the HR service type. For more information, see HR Knowledge Management.

Approvers

Lists employees that can approve changed information or the case, state of approval, comments, and associated dates. For more information, see Resubmit an HR case for approval.

Note: To reject an approval, users should have the HR case writer [sn_hr_core_case.writer] role.

Child Cases

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Lists child cases for the current case.

ER Cases for Involved Parties

Lists other ER cases for the involved parties of the ER case.

Create an Employee Relations case in Agent Workspace for HR Case Management

You can use HR Service Delivery Agent Workspace to create ER cases for employees that wish to report misconduct, discrimination, or a disciplinary issue.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. In the ER category, click **New**.
4. Search for an employee or case number, or select the **Skip verification** link if the subject person is external or wants to remain anonymous.
5. Fill in the form.

ER Case form

Field	Description
COE	The **Center of Excellence** associated with the HR case you are creating. Currently, Employee Relations Case is the only COE available for ER cases. Selecting a COE filters the choices for HR service. See HR Centers of Excellence data model. **Note:** You can also select an HR service first and the associated COE automatically populates.
HR Service	After selecting **Employee Relations Case** from the **COE** field, select one: ○ Accommodation Request ○ Report Discrimination ○ Report Misconduct **Note:** You can use the Skip verification feature when creating a Report Misconduct case. For more information, see Using HR Service Delivery Employee Relations. ○ Performance improvement plan(PIP)

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Field	Description
	Limit what HR services are available to an employee by filtering: ○ COE selected. ○ HR criteria for the **Subject person** based on the HR service configuration. Limit services filter on the **Case Creation Configuration** form. If the HR service field is empty, ensure that you did not remove the Opened for field. **Note:** **Bulk Parent Case** does not appear as a selection because it only appears when creating a parent case for child bulk cases. Refer to Add or modify bulk HR cases.
Opened for	The person the ER case was opened for. You can enter letters or numbers to search for possible hits. If the person wants to remain anonymous or is outside of your company, you can leave this field blank.
Subject person	The person the ER case is about.
Work notes	Details about the ER case. **Note:** Interviews are under the **more** tab.

6. Select **Create case**.
   The case returns with a **Case Timeline** that provides a visual of all tasks and key milestones and dates related to the case. The **Case Timeline** helps agents visualize and navigate the key investigation activities on a case and quickly understand the history and what still needs to be done. A **Show Legend** drop-down also appears to show or hide the number of events scheduled or conducted and the associated date.

   Below the **Case Timeline** are a number of tabs that you can provide additional information about the case.

   Note: Closed and completed events could still appear on the timeline, but not necessarily in the related tabs.

   The **Related Items menu** shows a series of tabs you can use to add information about the ER case.

   Details

   Workplace case information entered by the requester for the ER case.

   Involved Parties

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People associated with the ER case. Involved parties can be the complainant, subject of the allegation, a witness, or other (undefined). For more information, see Create an involved parties record.

Allegations

Information that further defines an employee relations case. For more information, see Create an allegation record.

Interviews

Interview record for an involved party. For more information, see Schedule an interview in Employee Relations using the legacy UI.

Evidence

Evidence to support the ER case. For more information, see Evidence Management for Employee Relations.

more

Select to view the following:

- Corrective Actions: Information about the resolution and any associated corrective actions after an investigation related to the ER case. For more information, see Create a corrective action.
- Attached Knowledge: List of knowledge articles attached to the HR service type. For more information, see HR Knowledge Management.
- Approvers: Lists employees that can approve changed information or the case, state of approval, comments, and associated dates. For more information, see Resubmit an HR case for approval.

  Note: To reject an approval, users should have the HR case writer [sn_hr_core_case.writer] role.

- Child Cases: Lists child cases for the current case.
- ER Cases for Involved Parties: Lists other ER cases for the involved parties of the ER case.
- Allegation Outcomes: Shows allegations and results.

Create an allegation record

Use Allegations to provide additional details for an ER case.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. **Optional:** Navigate to the **Allegations** tab in Core UI.
   a. Navigate to **All** > **Employee Relations** > **Cases**.
   b. Select an ER case.
   c. Scroll down to the related list and select the **Allegations** tab.
   d. Select **New**.
2. **Optional:** Navigate to the **Allegations** tab in Agent Workspace for HR Case Management.
   a. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
   b. Select the **Lists** icon ( ).

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c. In the ER category, select an ER case.

d. Select the **Allegations** tab.

e. Select **New**.

3. Fill in the form.

Allegation form

Field	Description
HR case	The HR case number associated with the allegation.
Allegation type	The allegation type describing the ER case. Allegation subtypes further describe an allegation. Allegation types are: ○ Customer Mistreatment ○ Discrimination ○ Drugs and Alcohol ○ Fraud and Theft ○ Harassment ○ Interpersonal Conflict ○ Misconduct ○ Retaliation ○ Wage and Scheduling ○ Workplace Violence
Allegation subtype	Further describes an allegation type. Your choice of allegation subtype is dependent on what you select for allegation type.
Description	Details about the allegation.

4. Click **Save** or **Submit**.
If an Involved Parties record of type **Subject of Allegation** exists, the Subject of allegation field in the allegation record is auto-populated, provided that only one subject of allegation exists.

Create an involved parties record

Capture information about people associated with the ER case. Involved parties can be the complainant, subject of the allegation, a witness, or other (undefined).

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. **Optional:** Navigate to the **Involved Parties** tab in Core UI.

a. Navigate to **All** > **Employee Relations** > **Cases**.

b. Select an ER case.

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c. Scroll down to the related list and select the **Involved Parties** tab.

d. Select **New**.

2. **Optional:** Navigate to the **Involved Parties** tab in Agent Workspace for HR Case Management.

a. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.

b. Select the **Lists** icon ( ).

c. In the ER category, select an ER case.

d. Select the **Involved Parties** tab.

e. Select **New**.

3. Fill in the form.

Involved Party form

Field	Description
HR case	The HR employee relations case number from the case you selected.
Type	The type of involved party. Select: ○ Complainant (the person or group that makes a complaint). ○ Subject of allegation ○ Witness ○ Other
Not in system	Option for indicating the involved party is not an employee of your company. **Note:** When you check this box, the Name field replaces the User field.
User	The person who is the involved party. Only appears when you don't check the **Not in system** box.
Name	The name of the involved party. Only appears when you check the **Not in system** box.

4. Click **Submit** or **Save**.

- If you select **Save**, the **Interviews** and **Corrective Actions** tabs appear. For more information, see Schedule an interview in Employee Relations using the legacy UI.
- Use the **Corrective Actions** tab to create and associate a corrective action record with an involved party.
- If an allegation record is created, the Subject of Allegation is auto-populated from the Involved Parties record of type **Subject of Allegation**, provided that only one subject of allegation exists.

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Using Interview Management

You can schedule and document interviews and use interview templates using the Core UI or HR Service Delivery Agent Workspace.

Creating a record of an interview is an important part of an employee relations investigation.

Scheduling an interview: There are two (2) methods you can use to schedule an interview:

- Manual entry: You enter a start and end date/time for the interview and confirm outside the application.

  Note: In legacy UI, the manual entry is the only method available for scheduling an interview.

- Use Microsoft Outlook Calendar to schedule an interview.
  - To use this feature, you must integrate with Microsoft Exchange. Ensure the **sn_hr_er.ex_online_notification_url** system property contains the Callback URL in the **Value** field. For more information, see Set up Microsoft Exchange Online spoke.
  - The **sn_hr_er.exchange_online_max_candidate** system property determines the maximum number of meeting time slots to return when trying to schedule an interview using Microsoft Exchange. The default value is 500 slots.

  Note: You can use the manual method of scheduling in HR Service Delivery Agent Workspace. For more information, see Schedule an interview in Employee Relations using the legacy UI or Schedule an interview in Employee Relations using Agent Workspace for HR Case Management.

Scheduling an interview

You can use the default ServiceNow® calendar or integrate with Microsoft Exchange to schedule interviews related to Employee Relations (ER) cases.

Schedule an interview in Employee Relations using the legacy UI

Documenting interviews is crucial to ER cases. Use the Interview form to take notes and capture important details of the ER case.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. Navigate to **All** > **Employee Relations** > **Cases**.
2. Select an ER case.
3. Scroll down and select the **Interviews** tab in the related list.
4. Select **New**.
5. Fill in the form.

Interview

Field	Description
Number	The number identifying the interview record. The application automatically assigns interview numbers.

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Field	Description
HR case	The HR ER case number associated with the interview. **Note:** If you access the interview from **Employee Relations**, you have to select an HR case to associate the interview to.
Interviewee	Name of the person who you are interviewing. Select the **Lookup using list** icon and search for the person you are interviewing. If no names appear, you can select **New** and create an involved party. For more information, see Create an involved parties record.
Interviewers	Names of the people who conducted the interview. Click the **Unlock Interviewers** icon and search for the names of the people who conduct the interview. **Note:** Only members with the sn_interview_temp.writer role or belong to a group that has the Employee Relations skill. You can optionally enter the email addresses for each interviewer.
External attendees	Indicates people outside of your company attended the interview.
External invite email	The email addresses of the external people that attend the interview.
Scheduling method	The method you are using to schedule the interview. If your company only uses the manual method of scheduling, **Manual entry** appears and cannot be edited. If your company uses the integration with Microsoft Outlook Calendar to schedule, **Calendar** appears. For more information, see Using Interview Management.
Start date	The date and start time of the interview.
End date	The date and end time of the interview.
Additional parties	Other people you want as part of the interview record.

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Field	Description
	Click the **Add me** icon to add yourself or the **Unlock additional parties** icon to add yourself or other people. You can optionally enter the email addresses for each interviewer.
External URL	A URL that is relevant to the interview. For example, if your company maintains interview notes in a different or external system from HR Service Delivery, you can enter the URL to maintain a link and consistency.
Interview date	The date the interview took place. Appears after the interview concluded.
Created by	The user that created the interview invite record.
Interview notes	Notes from the interview or you can enter the answers to the questions from the interview question templates.

6. Select the **Questions** button at the top, right corner to view, and select questions from an interview template.
   Interview templates ensure consistency and efficiency when conducting interviews. For more information, see Create an interview question template.
7. If an interview template appears, select it and you can select **Copy to clipboard** or **Insert to notes**.

   Note: **Copy to clipboard** copies the questions from the interview template and allows you to paste it to an external document. **Insert to notes** copies all questions to the **Interview notes** field.

8. Select **Save** or **Submit**.
   If you select **Save**, the Evidence related list appears. For more information, see Evidence Management for Employee Relations.

Schedule an interview in Employee Relations using Agent Workspace for HR Case Management

Use Agent Workspace for HR Case Management to capture a record of an interview.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. In the ER category, select an ER case.
4. Select **more** from the row of tabs below the **Case Timeline**.

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5. Select **Interviews**.
6. Select **New**.
7. Fill in the form.

Create new interview form

Field	Description
Number	The number identifying the interview record. The application automatically assigns interview numbers.
HR case	he HR ER case number associated with the interview. **Note:** If you access the interview from **Employee Relations**, you have to select an HR case to associate the interview to.
Interviewee	Name of the person who you are interviewing. Select the **Lookup using list** icon and search for the person you are interviewing. If no names appear, you can create an involved party. For more information, see Create an involved parties record.
Interviewers	Names of the people who conducted the interview. Click inside the field and a list of names appear that you can select. **Note:** Only members with the sn_interview_temp.writer role or belong to a group that has the Employee Relations skill.
External attendees	Indicates you want to add external attendees to the interview record.
External invite email	The email addresses of the external attendees. Only appears when you select the **External attendees** choice. **Note:** Separate each email address with a comma.
Scheduling method	The method you are using to schedule the interview. Select **Manual entry** to select the Start and End dates and times of the interview. If your company uses the integration with Microsoft Outlook Calendar to schedule,

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Field	Description
	select **Calendar**. You can schedule an interview with an interface that syncs with your company's Outlook Calendar. For more information, see Using Interview Management.
Start date	The start date and time of the interview. Select the **Show calendar** icon () and select the date and time the interview starts.
End date	The endt date and time of the interview. Select the **Show calendar** icon () and select the date and time the interview ends.
Additional parties	Other people you want as part of the interview record. Click in the field and a list of names appears. You can optionally enter the email addresses for each interviewer. **Note:** These names appear from
External URL	A URL that is relevant to the interview.
Created by	The user name of the person who created the interview record.
Interview notes	Notes from the interview or you can enter the answers to the questions from the interview question templates. In the Contextual Sidebar, select the **Interview Templates** icon () to search for interview question templates.

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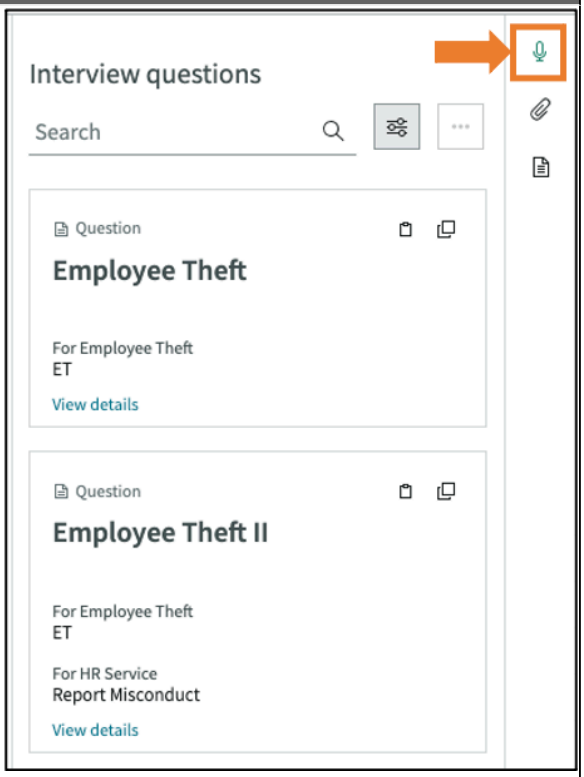
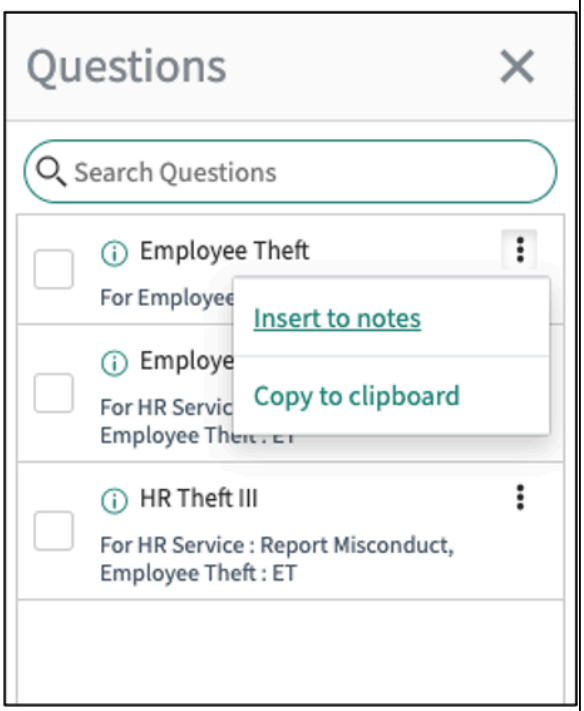
Field	Description
	 Interview templates provide questions you can use in the interview, You can insert the questions from the template into the **Interview notes** field or copy to the clipboard to insert in an outside document.  Select ⋮ to see the Insert to notes or Copy to clipboard choices.

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Field	Description
	Interview templates ensure consistency and efficiency when conducting interviews. For more information, see Create an interview question template.

8. Select **Save**.

Using Evidence Management

You can create, edit, and categorize evidence related to an employee relations case using the Core UI or HR Service Delivery Agent Workspace.

You can associate evidence to an Employee Relations (ER) case. For more information on ER cases, see Employee Relations.

Adding evidence to an Employee Relations case in legacy UI

Create evidence records to attach to an Employee Relations case to help with investigations.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. Navigate to **All** > **Employee Relations** > **Cases**.
2. Select a case.
3. Scroll down to the **Evidence** tab in the related list.
4. Select **New**.
5. Fill in the form.

Evidence form

Field	Description
Number	The number that identifies the evidence record. This is automatically generated by the application.
Name	The name that describes the evidence.
Evidence type	The evidence type associated with the evidence. The base system provides the following: ○ Audio ○ Chat logs ○ Email ○ Photos ○ Screenshots ○ SMS ○ Video

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Field	Description
	For more information, see Create evidence types.
Created by	Name of the user that created the evidence record.
Submitted by involved party	Name of the person who submitted the evidence. Select the **Lookup using list** icon and search for the person that submitted the evidence. If no names appear, you can select **New** and create an involved party. For more information, see Create an involved parties record.
Involved parties	Any person involved with the evidence provided in the ER case. Select the **Unlock involved parties** icon ( ) and search for people you want to include as involved parties. If no names appear, you can select **New** and create an involved party. For more information, see Create an involved parties record.
Table	The table evidence is associated with. The default is the Employee Relations Case [sn_hr_er_case] table, but you can associate evidence to any table.
Parent	The parent case the evidence is related to. To associate a parent case, select the **Lookup documents using list** icon and select the table associated with the parent case. The default is the Employee Relations Case [sn_hr_er_case] table. Select the table and the associated case that is the parent case. **Note:** If you have a parent case and evidence is added to it, this field is pre-populated.
Evidence source type	Indicates if the evidence is an attachment or a URL.

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Field	Description
	Select one. If the evidence is an attachment, attach the file using the Manage Attachments icon ( ) at the top, right of the form. If the evidence is a URL, enter the URL in the URL source field.
URL source	Select the Edit this URL icon ( ) and enter the URL. This field displays only when you select **URL** from the Evidence source type field.
Interview	The associated interview number. If you came from the interview record, the number automatically displays. For more information, see Interview Management for Employee Relations.
Description	Description of the evidence.

6. Select **Submit**.

Add case evidence in Agent Workspace for HR Case Management

Create evidence records to attach to an Employee Relations case to help with investigations using Agent Workspace for HR Case Management.

Before you begin

Role required: sn_hr_er.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. In the ER category, select an ER case to which you want to attach evidence.
4. Select **more** from the row of tabs below the **Case Timeline**.
5. Select **Evidence** from the row of tabs below the **Case Timeline**.
6. Select **New**.
7. Fill in the form.

Evidence form

Field	Description
Number	The number that identifies the evidence record. This is automatically generated by the application.
Name	The name that describes the evidence.

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Field	Description
Evidence type	The evidence type associated with the evidence. The base system provides the following: ○ Audio ○ Chat logs ○ Email ○ Photos ○ Screenshots ○ SMS ○ Video For more information, see Create evidence types.
Created by	Name of the user that created the evidence record.
Submitted by involved party	Name of the person who submitted the evidence. Select the **Search for Record** icon and search for the person that submitted the evidence. If no names appear, you can select **New** and create an involved party. For more information, see Create an involved parties record.
Involved parties	Any person involved with the evidence provided in the ER case. Click into the field and a list of involved parties appears. If no names appear, you have to create an involved party record. For more information, see Create an involved parties record.
Table	The table evidence is associated with. The default is the Employee Relations Case [sn_hr_er_case] table, but you can associate evidence to any table.
Parent	The parent case the evidence is related to. To associate a parent case, select the **Lookup documents using list** icon and select the table associated with the parent case. The default is the Employee Relations Case [sn_hr_er_case] table.

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Field	Description
	Select the table and the associated case that is the parent case. **Note:** If you have a parent case and evidence is added to it, this field is pre-populated.
Evidence source type	Indicates if the evidence is an attachment or a URL. Select one of the following: ○ Attachment ○ URL If the evidence is an attachment, select **Browse** from Attachments on the right and attach the file. If the evidence is a URL, enter the URL in the **URL source** field.
URL source	Select the Edit this URL icon () and enter the URL. This field displays only when you select **URL** from the Evidence source type field.
Interview	The associated interview number. If you came from the interview record, the number automatically displays. If no interview number appears, click into the field and you can select one. For more information, see Interview Management for Employee Relations.
Description	Description of the evidence.

8. Select **Save**.

Create a corrective action

Create a corrective action record for an ER case.

Before you begin
Role required: sn_hr_er.case_writer

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Procedure

1. Create a corrective action using one of the following options:

Corrective action options

UI	Steps
From Core UI	**a.** Navigate to **All** > **Employee Relations** > **Cases**. **b.** Select an ER case. **c.** Scroll down to the related list and select the **Corrective Actions** tab. **d.** Select **New**.
From the Agent Workspace for HR Case Management UI	**a.** Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**. **b.** Click the **Lists** icon ( ). **c.** In the ER category, select an ER case. **d.** Select **More tabs**. **e.** Select the **Corrective Actions** tab. **f.** Click **New**.

2. Fill in the form.

Corrective Actions form

Field	Description
Number	The number identifying the corrective action record. The system automatically assigns the corrective action numbers and you cannot change it.
HR case	The HR ER case number associated with the corrective action. **Note:** If you access corrective actions from an HR ER case, the number automatically appears.
Involved party	The person the corrective action is for. Click the Lookup using list icon and select from the list.
Corrective action type	The corrective action for this ER case. Select from the list: ○ Verbal warning ○ Written warning

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Field	Description
	○ Suspension ○ Termination
Status	The status of the corrective action. ○ Draft ○ Ready ○ In progress ○ Completed
Discussion date (yyyy-MM-dd)	Select the date of the corrective action discussion.
Discussion held by	The lead user of the corrective action discussion. Click the Lookup using list icon and search for the person who led the discussion.
Also present	Identifies other people that were part of the discussion. Click the **Add me** icon to add yourself or the **Unlock additional parties** icon to add yourself or other people.
Due date (yyyy-MM-dd HH:mm:ss)	The date and time the corrective action is complete.
Description	Notes and information on the corrective action meeting.

3. Click **Save** or **Submit**.

HR Service Delivery Employee Relations dashboards

The HR Service Delivery Employee Relations dashboards provides visual reports that give you statistics on ER cases.

There are five (5) sections that provide information:

Employee Relations Case Volume by Month

A bar chart showing the number of ER cases per month and year. Click a bar and the Employee Relations Cases list appears.

Employee Relations Case Volume by Allegation Type

A bar chart showing the number of ER cases by Allegation Subtype. Click a bar and the Allegations list appears.

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Employee Relations Case Volume by Location

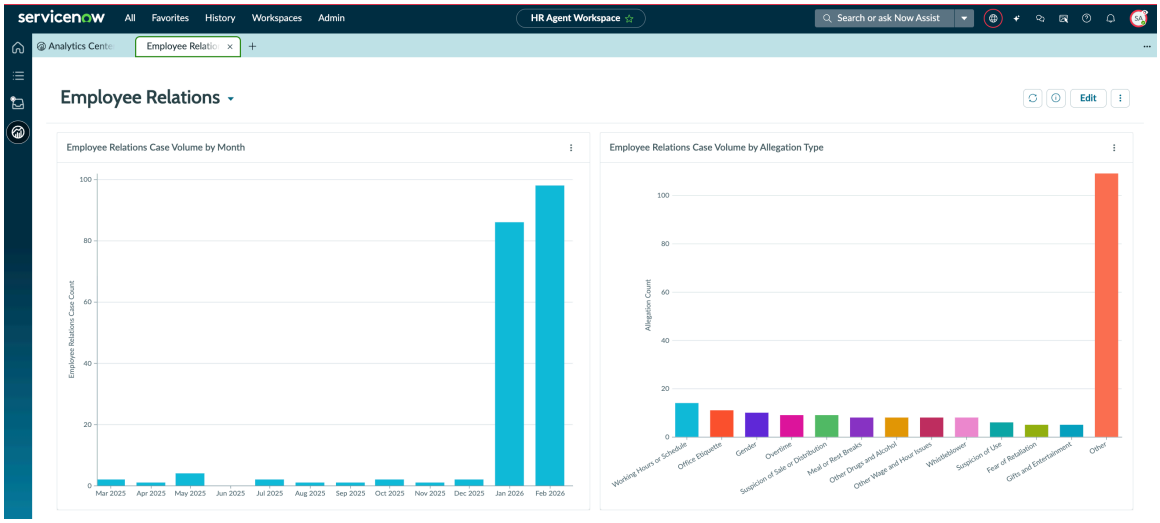
Map showing the number of ER cases per geographic region. Click the country and a detailed view appears.

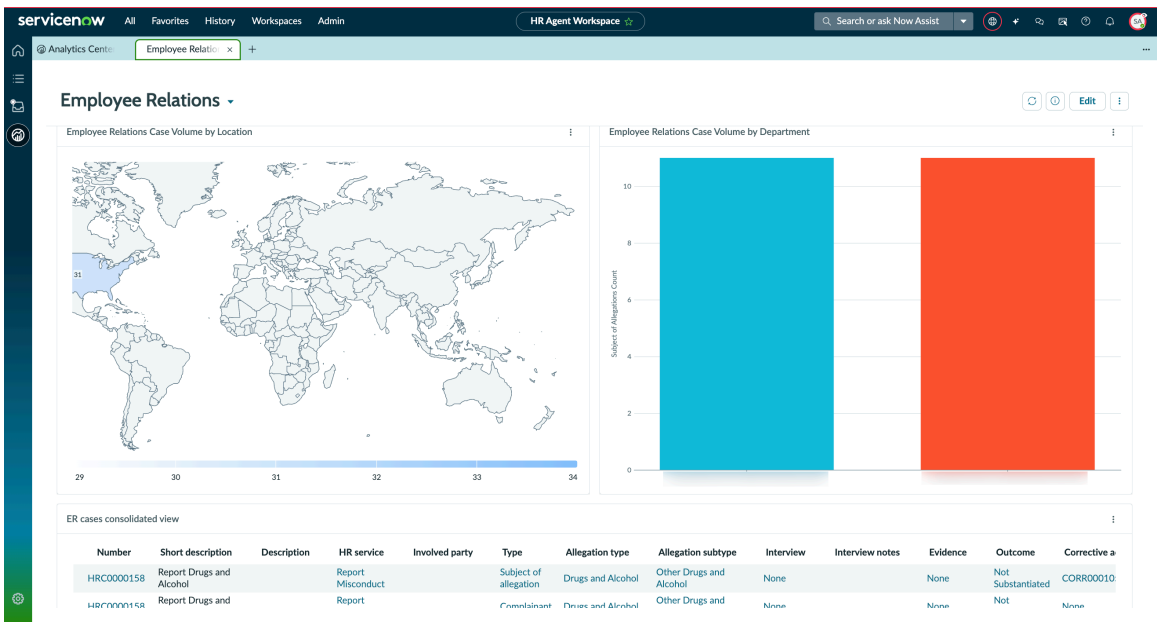
Employee Relations Case Volume by Department

Shows the number of ER cases by company department. Click the image and the Involved Parties list appears.

ER Cases Consolidated View

Provides a holistic view of all related tables for all the ER cases.





Employee Relations Performance Analytics Executive Overview

The HR Service Delivery Employee Relations (ER) Performance Analytics (PA) dashboard provides you with historical trends, data comparisons.

You must activate the Performance Analytics - Content Pack - Human Resources: Employee Relations Scoped App plugin.

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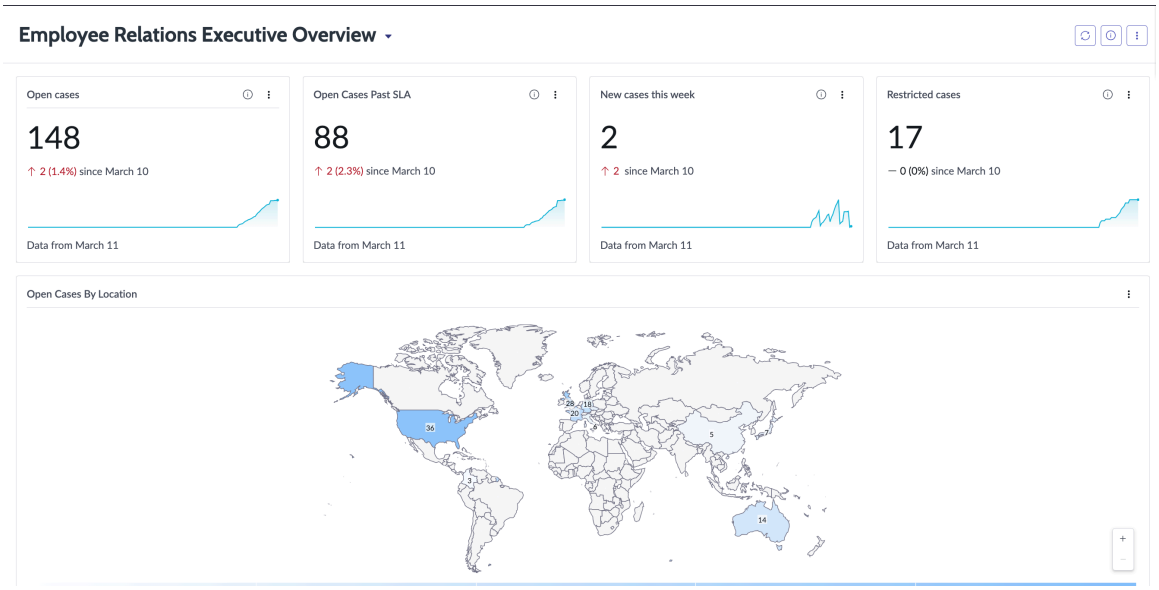
The HR ER PA dashboard provides timely information for the following:

Executive overview

Provides data on trends or areas of concern that are emerging and require a deeper analysis in order to create proactive strategies.



Case analysis

Provides case metrics and goals for ER agents and teams. Having this information can also help your ER teams plan their workload based on volume trends and the details on case data. This section provides:

- The number of open ER cases from the current time and date.
- The number of cases that have exceeded their Service Level Agreement (SLA).
- The number of cases created for the week from the current time and date.
- The number of restricted ER cases created from the current time and date.

Investigation analysis

ER investigation leaders need to understand the quality of service in an ER investigation and be able to identify trends beyond individual cases. Comparing cases and trends in allegation data are important in this area. This section provides:

- The number of ER cases by HR service. You can change how the data is displayed using the **Visualization** list.
- The number of ER cases by geographical location.
- The number of ER cases by department. You can change how the data is displayed using the **Visualization** list.
- The number for each allegation type for open cases. You can change how the data is displayed using the **Visualization** list.
- Data trends by allegation type.
- The number of closed cases by allegation outcome.

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Performance Improvement Plan (PIP) service

Manage employee performance issues within Employee Relations using the Performance Improvement Plan (PIP) service.

Organizations handle employee performance issues in close coordination with HR teams, Employee Relations teams, and/or Legal teams. Proper processes must be followed and appropriate documentation and communication must be maintained.

With this feature, a manager can:

- Initiate a PIP case for an employee and involve the Employee Relations advisory to handle and support the PIP case more efficiently.
- Track the progress of tasks and take the necessary action — Structured workflow (with a life cycle event) auto-initiates tasks for a manager, an employee, and an Employee Relations (ER) agent.

PIP workflow

Use case explaining how a manager, an employee, and an ER agent can work together on Performance Improvement Plan.

- A manager initiates a PIP request for an employee to have structured conversations with the employee on performance improvement, and have an agreed course of action with the ER department.
- A PIP case is automatically created and assigned to an ER agent. A Performance Improvement plan (PIP) life cycle event is triggered and tasks are automatically created for the manager, employee, and ER agent in the order specified (sequential or parallel).
- The employee and the manager receive tasks for signing the PIP acknowledgment forms.
- The manager schedules a coaching conversation with the employee and develops a plan for the employee, which is reviewed by the ER agent.
  - Aligns PIP goals with the employee and tracks the progress of the employee on a regular basis.
  - Conducts periodic reviews with the ER agent to evaluate employee progress.
  - Submits the PIP assessment indicating whether the PIP is successful or unsuccessful. See Complete PIP assessment.

Initiate a PIP request

Initiate a PIP request for your employee. Have structured conversations with your employee on performance improvement, and have an agreed course of action with HR or the Employee Relations department.

Before you begin

- Role required: admin
- Install the Human Resources Scoped App: Employee Relations, and Enterprise Onboarding and Transitions plugins.
- Activate the HR Taxonomy, and Document Templates applications from ServiceNow Store.

Procedure

1. Navigate to **All** > **Employee Center**.
2. Click the **HR** topic.

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3. Select the **Employee Conduct** tile or the **Career Development** tile.
4. Click the **Start a Performance Improvement Plan (PIP)** request.
5. On the form, fill in the fields:

Start a Performance Improvement Plan (PIP)

Field	Description
Employee name	Employee for whom you are initiating the performance improvement plan. **Note:** You will be able to select an employee only if you are added as the manager in the HR profile of the employee.
PIP start date	Start date for initiating PIP tasks.
PIP end date	End date for completing PIP tasks.
Reason for PIP	Reason for initiating PIP for the employee.
Areas of improvement	Areas in which you want the employee to perform well.

6. Click **Submit**.

What to do next
A PIP case is created and assigned to an ER agent. The (PIP) life cycle event is triggered and tasks are auto-initiated for the manager, the employee, and an ER agent.

Acknowledge a PIP request

Acknowledge the PIP request that is initiated by your manager. Complete other tasks that have been assigned to you.

Before you begin
Role required: none

Procedure
1. Navigate to **All** > **Employee Center** > **My tasks**.
2. Sign the PIP acknowledgement form that is sent by your manager.
3. Complete the other PIP tasks as and when they are assigned to you.

Complete PIP assessment

As a manager, complete the PIP assessment indicating whether the PIP is successful.

Before you begin
Role required: none

Procedure
1. Navigate to **All** > **Employee Center**.
2. Complete the PIP assessment task.
3. If the PIP is successful:

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a. Select **Yes** from the PIP successful list.

b. Click **Submit**.

4. If the PIP is unsuccessful:

a. Select **No** from the PIP successful list.

b. From the PIP extended list, select **Yes** to indicate the extension date, or select **No** if you do not want to specify an extension date.

c. Click **Submit**.

What to do next

When the PIP is marked unsuccessful, a PIP assessment case is created for the ER agent. The ER agent and the manager can discuss the next course of action for the employee.

Analytics and Reporting Solutions for Employee Relations

Analytics and Reporting Solutions contain prepackaged Performance Analytics content for use with other ServiceNow AI Platform products. This Analytics and Reporting Solution provides you with historical trends and data comparisons for Employee Relations to assess organizational performance.

Required roles

The following roles and tasks are associated with this Solution:

- ServiceNow AI Platform administrator (admin): Install and activate this Analytics and Reporting Solution and make any necessary changes to system properties.
- Performance Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.
- HR Service Delivery Employee Relations case reader (sn_hr_er.case_reader): Grants access to read all HR ER cases and the Employee Relations Executive Overview.

Activate the Analytics and Reporting Solution for Employee Relations

Activate the content pack plugins for the Analytics and Reporting Solution.

Before you begin

Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a non-production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.

Role required: admin

About this task

Activate the following plugins prior to activating the Performance Analytics - Content Pack - Human Resources: Employe Relations Scoped App [com.sn_hr_employee_relations_pa] plugin:

Plugins for HR ER PA

Plugin	Description
Human Resources Scoped App: Core [com.sn_hr_core]	Enables you to standardize the documentation, interaction, and fulfillment of employee inquiries and requests.

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Plugins for HR ER PA (continued)

Plugin	Description
	Note: Employee relations require activation of this plugin, but is a separate scope.
Performance Analytics - Content Pack - Human Resources Scoped App [sn_hr_employee_relations_pa]	Measures key performance indicators to track HR performance over time.
Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations]	Enables you to easily manage employee relations and investigations cases.

Procedure

1. Navigate to **System Applications** > **All Applications** > **All**.
2. Search for `Human Resources Scoped App: Employee Relations [com.sn_hr_employee_relations]`.
3. Install the application.
4.

Configure the Analytics and Reporting Solution for Employee Relations

Run diagnostics, review and customize components, and start collecting data.

Before you begin

A ServiceNow AI Platform administrator must have installed the content pack plugins or ServiceNow Store application for this Platform Analytics Solution.

Role required: pa_admin

Procedure

1. Run diagnostics on all records.

   These diagnostics can catch many mismatches between the configuration of your Platform Analytics Solutions and your tables. For more information, see Performance Analytics diagnostics.
2. Navigate to **All** > **Performance Analytics** > **Administration Console**.
3. Select the **Dashboards** link in the **Explore and Manage** tile.
4. Verify the Employee Relations Executive Overview dashboard that are installed with this Platform Analytics Solution.
5. Open the **Indicator Sources** tab.
6. For each dashboard included in this Platform Analytics Solution:

   a. Filter the indicator sources on the dashboard name.

   Example

   Here you see the indicator sources filtered on the Self-Service Analytics dashboard from the Employee Relations Executive Overview.

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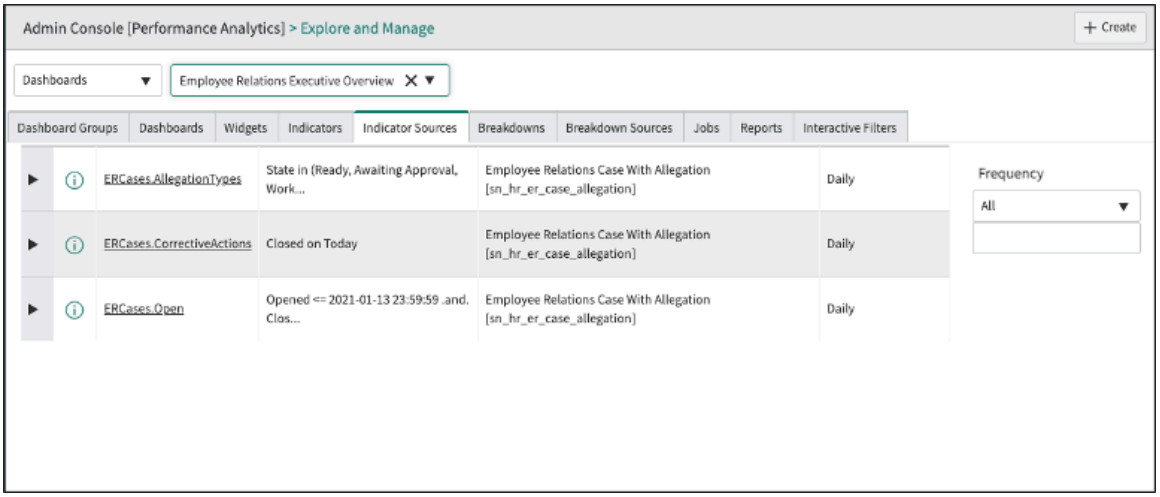

b. Review the facts table, conditions, and frequency of the indicator sources compared to the data structure on your own instance.

> **Important:** Pay particular attention to time stamp fields such as Resolved or Created that are referenced in the **Conditions** field. You may need to use different time stamp fields.

c. If necessary, open an indicator source and make corrections.

d. If you are editing an indicator source record, go to the Indicators related list and review the **Conditions** field for each indicator.

   Changing the indicator source can also affect the additional conditions on the individual indicators.

7. If you changed the time field stamps in any indicator sources, then change any related Performance Analytics scripts.
8. Open the Breakdown Sources tab.
9. For each dashboard included in this Platform Analytics Solution:
   a. Filter the breakdown sources on the dashboard name.
   b. Review the conditions on the breakdown source.
10. Navigate to **All** > **Performance Analytics** > **Jobs**.
11. Set up and run the historical job for this Analytics and Reporting Solution, *`ERCases.HistoricalDataCollection`*.
12. Edit and activate the scheduled data collection job for this Analytics and Reporting Solution, *`ERCases.DailyCollection`*.

Employee Relations Executive Overview dashboard

The Employee Relations Executive Overview dashboard provides you with high level data on Employee Relations cases and detailed information on the types of ER cases, locations, cases by HR service and department, and trends.

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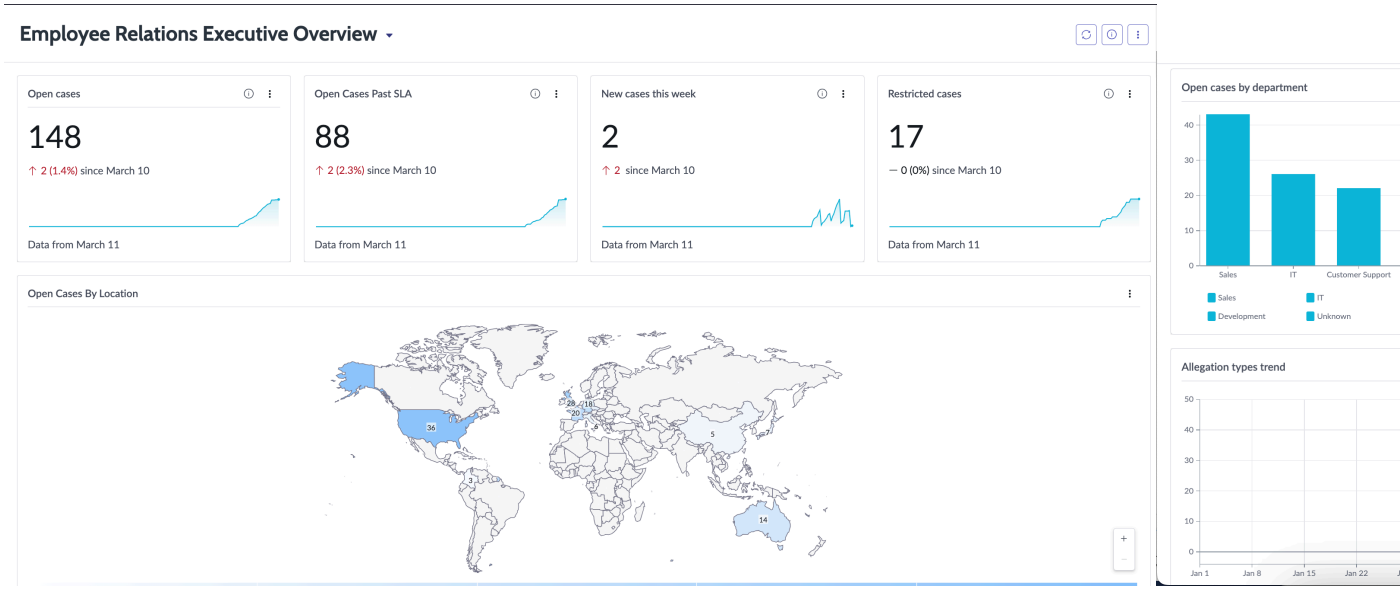

Required ServiceNow AI Platform roles

sn_hr_er.case_reader

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Use cases of Employee Relations Executive Overview dashboard

User	Dashboard use
Employee Relations employee or HR leadership	The dashboard provides: • A high-level overview of the current ER case volume, status, and distribution. • An understanding of the top ER case types and issues by different employee populations. • Identification of hot spots early so they can be resolved quickly. • An analysis of trends and changes that can inform process improvements and ER strategy.

Indicators

ERCases.CorrectiveActions

Shows corrective actions taken for closed cases.

ERCases.AllegationTypes

Shows data for each allegation type on open ER cases.

ERCases.Restricted

The number of restricted ER cases.

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ERCases.NewThisWeek

The number of ER cases created this week.

ERCases.Open

The total number of open ER cases.

ERCases.PastSLA

The number or ER cases that have past the Service Level Agreement (SLA).

Breakdowns

- ERCases.AllegationTypes
- ERCases.CorrectiveActionTypes
- ERCases.HRService
- ERCases.Priority
- ERCases.State

Reports

Reports in Employee Relations Executive Overview dashboard

Title	Type	Source table	Description
Open cases	Real-time Score	Employee Realtions Case [sn_hr_er_case] table	The total number of open ER cases.
Open cases past SLA	Latest Score		The number of open ER cases that have passed the Service Level Agreement (SLA)
New cases this week	Real-time Score		The number of new ER cases for the current week.
Restricted cases	Real-time Score		The number of ER cases that are classified as restricted. For more information, see Employee Relations case restrictions.
Open cases by location	Map	Employee Realtions Case [sn_hr_er_case] table	Provides the number of open ER cases by geographical location. This data can help you recognize trends or you can use it for data comparisons. The location represents the location of the

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Reports in Employee Relations Executive Overview dashboard (continued)

Title	Type	Source table	Description
			Opened for users at the time the case was opened.
Open cases by HR service	Scorecard		Shows the number of open ER cases by date for each HR service (with link) and a trending graph.
Open cases by department	Column (default)		Shows the number of ER cases for each department within your company.
Allegation types for open cases	Column (default)		The number of open ER cases for each allegation type.
Allegation types trend	Line Chart		Provides the number of ER cases by allegation type by date. It also shows a trend line that indicates if cases are going up, down, or staying neutral.
Outcomes of allegations for closed cases	Line Chart		Shows the number and corrective actions associated with a closed ER cases by allegation.

Anonymous Report Center (ARC)

Employees can submit sensitive complaints or misconduct cases anonymous to the agent working on the case, using the Anonymous Report Center (ARC) portal.

Your employees can use the ARC to:

- Submit a complaint without disclosing their identity to the agent working the case.
- Receive updates on their complaint.
- Communicate confidentially with investigators.

From the Employee Center, employees are re-directed to the ARC and from there they can create a complaint anonymous to the agent working the case.

Note: The ARC can be activated as a stand-alone feature or combined with HR Service Delivery Employee Relations.

You can use the Completely Automated Public Turing (CAPTCHA) or Google reCAPTCHA V2 to verify a human is submitting the complaint.

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From the Employee Center, employees can choose to submit a complaint through the Employee Center or use the Anonymous Report Center (ARC). When using the ARC, the user is signed out of the Employee Center and directed to the ARC.

Note:

- A report key (optional) can be generated that allows the person filing the complaint to track and view details about the progress of the anonymous case and respond to any follow up questions. Without the report key, the person who made the anonymous report cannot access their report. For more information, see Setting up the Anonymous Report Center.
- Anonymous Report Center (ARC) does not display all widgets if the guest user is deleted from the instance.
- Although HR agents can't track users through the ARC portal, system admins can potentially trace users via their IP addresses.

Setting up the Anonymous Report Center

Set up and configure the Anonymous Report Center (ARC) to provide your employees a way to submit complaints anonymous to the agent.

Install and activate the Anonymous Report Center (com.sn_anonymous_report_center) plugin to use the Anonymous Report Center (ARC) if you have the admin role. For more information, see Activate the Anonymous Report Center.

Roles installed

Role	Description	Contains roles
sn_anon_rc.admin	Grants admin rights to Anonymous Report Center application.	

System properties

The following system properties are available:

- Length of the auto generated secret key used for retrieving anonymously created reports. The minimum key length is 14. (sn_anon_rc.secret_key_length): Determines the length (in characters) of the auto generated secret key used for retrieving anonymously created reports. The minimum length is 14 and the default.
- Enable Google reCaptcha V2 on Anonymous case creation. If true, please configure on Google and set these properties: google.captcha.secret, google.captcha.site_key (sn_anon_rc.arc.captcha.google.enabled): You can enable Google reCAPTCHA V2 for anonymous case creation. Google reCAPTCHA V2 verifies if an interaction is legitimate and the complaint was created by a person. For more information, see Google reCAPTCHA.

  Note: If you decide to use Google reCAPTCHA V2, you must define the following Google reCAPTCHA V2 properties:

  - google.captcha.secret
  - google.captcha.site_key

  You must also set up an enterprise Google captcha account. For more information, see Configure Google reCAPTCHA for the password reset process.

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- Allow anonymous user access to the anonymously created cases using secret key. (sn_anon_rc.allow_anonymous_case_access): Determines if anonymous users can access the anonymous cases they submitted using a secret key.

Note: A report key (optional) can be generated that allows the person filing the complaint to track and view details about the progress of the anonymous case and respond to any follow up questions. Without the report key, the person who made the anonymous report cannot access their report. HR agents that have access to the Anonymous Report Center (ARC) and admin has access. For more information, see Setting up the Anonymous Report Center.

Activate the Anonymous Report Center

You can activate the Anonymous Report Center plugin (com.sn_anonymous_report_center) for the ServiceNow AI Platform if you have the admin role.

Before you begin

If the Human Resources Scoped App: Core (com.sn_hr_core) plugin is activated, the Employee Center is also included. On-demand delegations can be performed with the Employee Center or the ServiceNow® mobile.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Anonymous Report Center plugin (com.sn_anonymous_report_center)using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Using the Anonymous Report Center

Your employees can use the Anonymous Report Center (ARC) to submit sensitive complaints or misconduct cases anonymous to the agent working on the case.

Anonymously report misconduct

Create misconduct cases that are sent to your Human Resources department without your identity being revealed.

Before you begin

Role required: none

Note: Ensure that the Anonymous Report Center (com.sn_anonymous_report_center) and Human Resources Scoped App: Employee Relations (com.sn_hr_employee_relations) plugins are activated.

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Procedure

1. Navigate to **All** > **Self Service** > **Employee Center**.
2. From the **Human resources** tab, select **Employee Conduct**.
3. Select **Visit Anonymous Report Center**.
   You are logged out of the Employee Center and logged into the **Anonymous Report Center** as a guest user.
4. Select **Submit an Anonymous Report**.
5. Select **Report misconduct**.
6. Fill in the form.

Report misconduct

Field	Description
Do your best to fully describe the situation	Provide information that accurately describes the misconduct you witnessed with as much detail as possible. **Note:** All information you provide is confidential.
List the names and info of those involved	Provide the names of the individuals involved in the misconduct. Include any witnesses to the misconduct. **Note:** Full names, job titles, teams, and departments are valuable for the investigators.
Let us know what date the incident occurred	Select the date the misconduct occurred. **Note:** Estimated dates are acceptable.
Let us know where the incident took place	Enter the location the misconduct occurred. **Note:** Details like room, desk spaces, or areas within the building the misconduct took place are all helpful to investigators.
I understand that the information I'm providing, including any sensitive or personal details, will be reviewed by the appropriate HR agents and teams.	After completing the form, check the box.

7. Enter the text verification code or check the **I'm not a robot** box.
8. Select **Submit**.

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9. To save a PDF copy of your report, select the **Save a PDF copy of your report** link.

> **Note:** The report key and report number are required to access updates or comments related to an anonymous report. The report key and report number allows the person filing the complaint to track and view details about the progress of the anonymous case and respond to any follow up questions. Without the report key, the person who made the anonymous report cannot access their report. HR agents that have access to the Anonymous Report Center (ARC) and admin has access. For more information, see Access an anonymous report.

Anonymously report discrimination

Create discrimination cases that can be sent to your Human Resources department without your identity being revealed.

Before you begin

Role required: none

> **Note:** Ensure that the Anonymous Report Center (com.sn_anonymous_report_center) and Human Resources Scoped App: Employee Relations (com.sn_hr_employee_relations) plugins are activated.

Procedure

1. Navigate to **All** > **Self Service** > **Employee Center**.
2. From the **Human resources** tab, select **Employee Conduct**.
3. Select **Visit Anonymous Report Center**.
   You are logged out of the Employee Center and logged in to the **Anonymous Report Center** as a guest user.
4. Select **Submit an Anonymous Report**.
5. Select **Report discrimination**.
6. On the form, fill in the fields.

   All information you provide is confidential.

Report discrimination form

Field	Description
Please describe the situation in detail	Description of the discrimination incident with as much detail as possible.
Please list the employees who were involved	Identity information on the individuals involved in the discrimination and any witnesses to the discrimination, such as their full names, job titles, and team and department affiliations.
Indicate the approximate date of the incident	Date the discrimination occurred. **Note:** You can provide an estimated date.
Indicate the place where the incident took place	Detailed location information on where the discrimination occurred, such as the room, desk space, or area within the building.

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7. Select the confirmation check box that states **I understand that the information I'm providing, including any sensitive or personal details, will be reviewed by the appropriate HR agents and teams**.
8. Enter the text verification code or select the **I'm not a robot** check box.
9. Select **Submit**.
10. Save a PDF copy of your report, which contains the report key and report number necessary to access report updates, progress, or comments, by selecting the **Download report copy** link.

> **Note:** Only HR agents and admins that have access to the Anonymous Report Center and can access reports. For more details, see Access an anonymous report.

Access an anonymous report

You can retrieve your anonymous report to submit or view comments and updates from the agents working on your anonymous report. You must have the report key and report number in order to access your anonymous report.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Self Service** > **Employee Center**.
2. From the **Human resources** tab, select **Employee Conduct**.
3. Select **Visit Anonymous Report Center**.
   You are logged out of the Employee Center and logged into the **Anonymous Report Center** as an anonymous user.
4. Select **Follow up on a report**.
5. Enter the **Report Key** and **Report Number**.

> **Note:** This information was provided when you submitted your anonymous report. Without this information, you cannot access it. If you no longer have this information, create a new anonymous report with details on the misconduct or discrimination and indicate that you lost the report key and report number from your first anonymous report.

6. Enter the text verification code or check the **I'm not a robot** box.
7. Select **Next**.
8. Enter questions or comments related to the anonymous report.
9. Select **Post**.

Employee Relations integration with Universal Request and Legal Investigations

Employees can submit complaints through the Employee Center portal without worrying about who should investigate the complaint. During the triaging or investigation process, fulfillers working on these issues can transfer them back and forth between the Legal and HR departments as necessary for resolution.

Better together solutions

Use Legal Investigations and HR Service Delivery Employee Relations with Universal Request together for the following key features:

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- Omni-channel modes for submitting complaints via the Employee Center portal, and Anonymous Report Center (ARC) portal.
- Single triaging queue for all complaints through Universal Request.
- Inter-departmental transfer of case details between Legal Service Delivery Legal Investigations and HR Service Delivery Employee Relations.

Complete the necessary configurations to start using the integration. See Set up Legal Investigations with HR Service Delivery Employee Relations.

Integration workflow

Use case explaining how routing agents, legal fulfillers, and HR agents can use the applications (Legal Investigations, Employee Relations and Universal Request) together to resolve complaint requests submitted by employees.

1. Employees who observe an ethical violation or similar incident report it by submitting a universal request. See Submit a complaint through the Quick Link in Employee Center.

   Alternatively, an ethics compliance ticket can be raised via Anonymous Reporting Center.

2. A universal request routing agent can triage these complaint requests and create tickets for the appropriate department to work on. An HR case can be created from a universal request with COE as Employee Relations Case, and HR Service as Report Misconduct. See Create an HR case from Universal Request.
3. An HR agent who is assigned the ticket can work on it and close it, transfer it to another department, or transfer to the universal request.
4. When a ticket is transferred from the HR department to the Legal department, the details in the HR ticket (description, short description, comments, attachments, and underlying data of the investigation such as involved parties, allegations, interviews, and evidence) are copied to the legal ticket. See Transfer an HR case in Universal Request.

   The HR ticket is closed and a legal ticket is created which is handled by a legal agent.

HR Documents

Apps that support documents in HR.

Employee Document Management	Document Templates
	
Organize, secure, and track documents with access control and retention policies	Provides embedded signature capability for HTML and PDF document templates

HR e-signature

HR e-signature is a **non-embedded signature** capability for managed documents, and knowledge articles, attached to an HR task for fulfillment. It supports three signing types (Acknowledgment, Credential, and Signature) and two document types (Managed Documents and Knowledge Articles).

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Note:

- HR e-signature must be used for internal, non-legal acknowledgment use cases.
- HR e-signature is a legacy product with no active development.

HR document templates provides embedded signature and supports both internal and external e-signing use cases. It supports two document types, HTML and PDF.

Note: HR document templates is a legacy product and being prepared for deprecation. Use Document Templates instead.

Employee Document Management

Manage large numbers of documents more efficiently with the ServiceNow™ Employee Document Management product. Employee Document Management provides storage space, a filing system, the ability to easily retrieve documents, defining who can view sensitive documents, and when to purge documents.

Your company asks employees to complete and return documents related to benefits, payroll, employee relations, access to internal systems, and other services. Employee Document Management is cloud-based, efficient, secure, and it reduces compliance risks.

Explore	Configure	Use
Learn about how Employee Document Management works	Plan and configure your implementation	Learn how to manage employee documents
Dashboard	**Reference**	
View statistics of your employee documents	More information on other properties of Employee Document Management	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University

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- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Employee Document Management

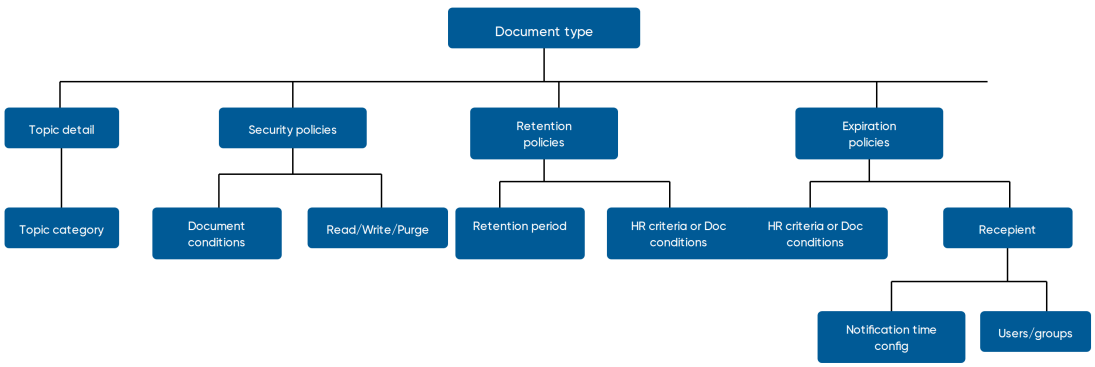
With Employee Document Management, you can streamline document management and maintain documents with integrity, accuracy and access controls.

Streamline management of employee documents

- Centralize files that are currently stored on multiple cases.
- Automatically or manually move employee documents from a case to the employee file.
- Find documents using metadata tags.
- Place legal holds on all documents for an employee (HR profile), or for all documents by document type.
- Define who can access what documents.
- Define retention policies that determine how long to retain employee documents and prevent purging for legal holds.
- Define when to purge documents.

Configure Employee Document Management

The base system provides pre-configured records that can be used immediately to expedite the configuration of Employee Document Management.



Employee document definitions

To use Employee Document Management, you must define the following:

- Document type: Defines how documents are categorized and are associated with Center of Excellence (COE), topic categories, and topic details. For example, you can create a document type for all documents related to Total Rewards or for each benefit. Document types also determine who can access, how long to retain, and if a legal hold is in effect.
- Retention periods: Defines how long to keep an employee document based on regulations or company policy.

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- Retention policies: Combined with a retention period and criteria, determines how long to retain an employee document.
- Security policies: Determines who can view, create, move, or authorize to purge employee documents.

You can configure employee documents to automatically move to the document repository when an HR case is completed and closed.

Administrator, agent, and employee access to Employee Document Management

There are multiple levels of access for Employee Document Management.

- Administrators configure the Employee Document Management application.
- Agents upload employee documents on behalf of employees or as part of a case.
- Employees who can upload and view their documents.

Employee Document Management administrators assign appropriate roles to employees who require access to employee documents. The security policy determines access and purge authorization.

The document type and the associated retention policy and retention period determine when to purge employee documents. The security policy can require approval to purge. The security policy requires a user to belong to the group that has purge authorization.

Legal holds can be placed on HR profiles. Legal holds prevent employee documents from being purged. You can also place and manage legal holds by document type. Managing by document type provides bulk-processing for increased efficiency.

Employee Document Management for agents

Employee Document Management agents can:

- Search for existing employee documents using different filters.
- Place or upload employee documents directly into the repository.
- When your company is also using HR Service Delivery, you can move employee documents from the HR case form to the repository. Employee documents can also be configured to automatically move when an HR case is closed.

Employee access

Employees can view their own employee documents when the document type provides employee access. Employee documents are also available on HR cases and the Service Portal or Employee Service Center profile page. See Define policies for a document type.

Configuring Employee Document Management

Configure Employee Document Management.

Activate Employee Document Management

You can activate the Employee Document Management [com.sn_employee_document_management] plugin with the admin role. This plugin includes demo data and activates related plugins if they are not already active.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Request employee document management bulk uploads

The Employee Document Management Bulk Uploads requires separate subscriptions to the Orchestration [com.snc.runbook_automation] and ServiceNow IntegrationHub Installer [com.glide.hub.integrations] plugins. These plugins must be activated by ServiceNow personnel.

Before you begin
Role required: admin

About this task
There is demo data available that provides configuration examples of a local directory and third-party, cloud-based document repositories. These examples help you to configure Employee Document Management bulk uploads with your own internal document repository.

To view the demo data, you must activate the Orchestration [com.snc.runbook_automation] and ServiceNow IntegrationHub Installer [com.glide.hub.integrations] plugins first.

The Employee Document Management [com.sn_hr_employee_document_management] plugin must be activated last.

Plugins for Employee Document Management Bulk Uploads

Plugin	Description
Orchestration [com.snc.runbook_automation]	Required for bulk imports from local drives.
ServiceNow IntegrationHub Installer [com.glide.hub.integrations]	Required for bulk imports from third-party, cloud-based document repositories.

To purchase a subscription, contact your ServiceNow account manager. The account manager can arrange to have the plugin activated on your organization's production and subproduction instances, generally within a few days.

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If you don't have an account manager, decide to delay activation after purchase, or want to evaluate the product on a subproduction instance without charge, follow these steps.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Select **Request plugin** to open the **Activate Plugin** form on Now Support.
3. On the **Activate Plugin** form, provide the following information.

Activate Plugin form

Field	Description
What is your target instance	Select the instance that you want to activate the plugin on.
Which plugin would you like to activate	Select the name of the plugin to activate. **Note:** If the system doesn't list the plugin you want or if you're activating the plugin on an OEM or on-premise instance, select the **Plugin I'm looking for is not listed** check box and then enter the name of the plugin.
Select Maintenance Date and Time	Select the date and time to activate the plugin.

Example

For example, see the following form to activate the Event Management plugin on an instance named SNC Instance.

4. Select **Submit**.
   After the maintenance window, the system installs the plugin on your instance. To confirm the installation, go to the Installed tab in the Application Manager.

Related topics

List of plugins (Madrid)

Defining and setting for employee documents

Use Employee Document Management to configure how employee documents should be handled based on company policy, processes, and regulatory compliance.

Document types

Document types are at the center of the Employee Document Management application. All employee documents are required to have a document type assigned. Categorize your employee documents by assigning document types. Use document types to combine policies that determine handling of an employee document. Use document types to:

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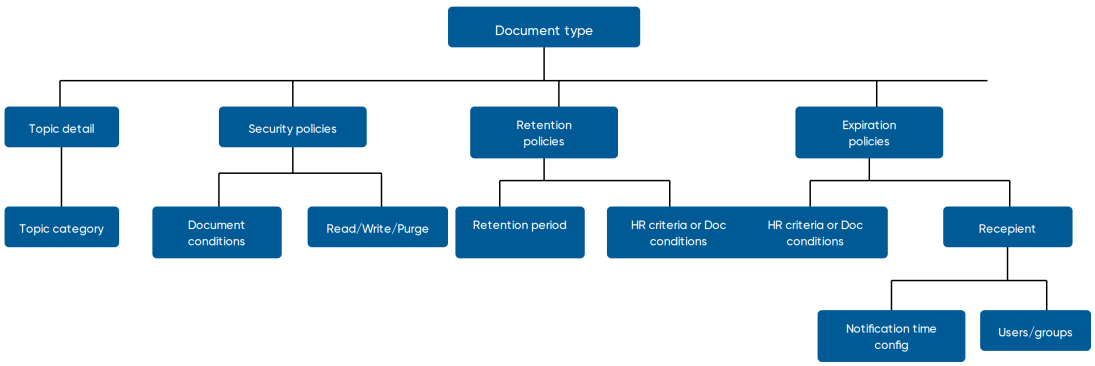
- Associate a security policy. Security policies determine who can access employee documents and determine purge authorization.
- Associate a retention policy. Retention policies determine how long to keep a document and who the document is applicable to.
- Place a legal hold. Legal holds temporarily prevent document purging or changes to the document.
- Allow access to employees.
- Configure employee documents to be moved automatically when an HR case is closed. See Configure an HR service.



Define policies for a document type

For each document type, you can determine who can access a document as well as define the retention policies associated with it, or place a legal hold. A document type can manage multiple documents.

Before you begin

Role required: sn_hr_ef.manager

About this task

Document types combine topic detail, retention policies, and legal holds. The default retention period for a document type is defined on the corresponding Center of Excellence (COE). For details on COEs, see HR Centers of Excellence data model.

Note: The base system provides various document types as examples.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Document Types**.
2. Click **New** or an existing document type to edit.
3. Fill in the fields as appropriate.

Document Type form

Field	Description
Name	Name that describes the document type.
Topic detail	Topic detail associated with an HR service.

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Field	Description
	The topic detail categorizes the document type. The HR service can be used to automatically move employee documents to the employee document repository when an HR case is closed.
Active	Option for activating or deactivating a document type. On deactivating a document type, the document type does not appear for selection when creating a document or moving attachments.
Application type	Application associated with the document type.
Legal hold	Indicates if a legal hold has been placed on the document type. When checked, all employee documents with this document type are placed on legal hold.
Employee access	Enables employees to access their own employee documents.
Expiration date	Option to set expiration date on a document. Email notifications will be sent to document owners, managers, or HR representatives (as per expiration policies) when the document expires or nearing its expiration.

4. From the Context Menu, click **Save** to remain on the Document Type form.
The following tabs appear.

Document type tabs

Tab	Description
Security Policies	Security policy associated with the document type. Security policies grant authorized users the ability to view, create, move, or authorization to purge employee documents. When you select a topic detail, the default security policy associated with that topic detail (if any) is automatically displayed in the **Security Policies** tab. In the **Security Policies** tab, you can, ○ Add and associate multiple security policies to a document type. ○ Define an order in which a security policy must be evaluated. Lower numbers are placed ahead of higher numbers. For example, a security policy with an order set

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Tab	Description
	to 100 is evaluated before a security policy with an order set to 200. ○ Enable or disable a security policy. When you disable a security policy, it implies that a security policy will be associated with the document type, but will not be considered for evaluation.
Retention Policies	Retention policy associated with the document type. The retention policy combines the retention period (determines how long a document should be saved) and HR criteria (filters who the policy is applicable to). See Add or modify a retention policy.
Legal Holds	Shows any legal holds placed on the document type with reason, date, and time stamps.
Expiration Policies	Expiration policies enable an administrator to filter documents of a document type based on HR criteria or on fields of employee document table or as a combination. It also enables an administrator to configure groups or recipients that could receive email notifications when document expires or nears its expiration.

5. After adding or editing the retention policy, click **Save** to remain on the Document Type form or click **Submit** to return to the Document Type list.

Define how long to retain employee documents

A retention period defines how long an employee document should be saved before being discarded. Retention periods are combined with conditions or criteria to form a retention policy.

Before you begin

Role required: sn_hr_ef.manager

Note: Retention periods are unique and cannot be duplicated. Before you can delete a retention period, you must be sure that a document type is not associated with the retention policy.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Retention Periods**.
2. Fill in the fields as appropriate.

Retention Period form

Field	Description
Title	Name that describes the retention period.

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Field	Description
Date field	Starting point of the retention period. The fields that are available depend on the Employee Document [sn_hr_ef_employee_document] table. Fields from the Employee Document [sn_hr_ef_employee_document] table used to define the beginning of the retention period. Dot-walk and select a field to determine the starting point of the retention period.
Application type	Application associated with the retention period.
Date offset type	Offset that determines if the retention period should start before or after what was selected in the **Date field**. Combined with the **Date field**, **Date offset units**, and **Date offset quantity** determines the length of the retention period. For example: ○ Date field = Created ○ Date offset type = After ○ Date offset units = Years ○ Date offset quantity = 1 Using this configuration, the retention period is one year after the created date of the document.
Date offset units	Unit of time that determines if the retention period should be measured in months or years.
Date offset quantity	Number of months or years before or after the **Date field** selection.

3. Click **Submit** or **Update**.

Add or modify default retention policies

Default retention policies ensure that employee documents are not mistakenly purged. When a retention policy has not been assigned to a document type, the default retention policy is used.

Before you begin
Role required: sn_hr_ef.manager

About this task
You can edit default retention policies.

The HR Service Delivery base system provides default retention policies for each employee document associated with a Center or Excellence (COE) table.

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Default retention policies are assigned to all documents that fall under a COE and the retention period is indefinite and never purged.

Note: If you change the default retention period, all new documents are assigned the new period, but existing documents still use the original retention period.

Default retention policies cannot be deleted when being used by a document type. Only one default policy for a COE is allowed.

Once a purge date is calculated and a legal hold is placed, the purge date does not change.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Default Retention Policies**.
2. Click **New** to create a default retention policy or on an existing policy to edit.
3. Fill in the fields as appropriate.

Default Retention Policy

Field	Description
Table	COE table employee documents are associated with when the HR Service Delivery is licensed and activated.
Retention period	Retention period identifying how long the document is retained. The only field you can edit.
Application type	Application associated with the default retention policy.

4. Click **Submit** or **Update**.

Add or modify a retention policy

Set policies determining how long documents should be retained and who is covered. Retention policies combine the retention period and conditions or criteria.

Before you begin

Role required: sn_hr_ef.manager

About this task

Regulations, laws, and your company policies determine how long documents should be retained.

Once a purge date is calculated and a legal hold is placed, the purge date does not change.

To ensure that there are no accidental purging, the base system provides default retention policies. When a retention policy has not been assigned to a document type, the default retention policy is used.

When a document type is covered by multiple retention policies:

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- The policy with the longest retention period applies.
- When there is a non-default default retention policy and a default retention policy with a retention period of indefinite, the non-default retention policy applies. Assuming the HR criteria matches and the retention period is applicable.

Retention policies have a one-to-one relationship to a document type, you cannot have the same retention policy for multiple document types.

Note: You can use the same retention period for multiple retention policies.

When you have multiple retention policies, but there is an overlap in criteria, the retention policy with the longest retention period is used.

For example: Document type = Disciplinary Notice

- Retention policies:
  - US employees (retention period = End Date + 7 years)
  - US contract employees (retention period = End Date + 5 years)
- If a user is both a US employee and contract employee, the US employees retention policy is used because it has a longer retention period.

Note: You can use the default retention policy for all document types. The default retention policy defines that all employee documents are retained while an employee is a current employee of your company. Once an employee leaves the company, a second retention policy is triggered based on HR criteria. When an employee does not satisfy the HR criteria and leaves the company, the original default retention policy is still in effect. The employee documents are retained indefinitely.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Retention Policies**.
2. Click **New** or an existing retention policy to edit.
3. Fill in the fields as appropriate.

Retention Policy form

Field	Description
Applies to	Employee Document [sn_hr_ef_employee_document] table and document type associated with the retention policy. Select a table and document type the retention policy is based on.
HR criteria	Who the retention policy applies to. For example, you can select HR criteria based on a country. This criteria ensures everyone based in the selected country has the same retention policy.

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Field	Description
	Note: When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Retention period	How long an employee document should be saved.
Active	Indicates if the retention policy is active and in use. **Note:** Default retention policies cannot be deactivated.

4. Click **Submit** or **Update**.

Add or modify default security policies

Default security policies ensure that employee documents are secure. The HR Service Delivery base system provides default security policies for each document type and determines who can access and has purge authorization.

Before you begin

Role required: sn_hr_ef.manager
Users are granted access to employee documents by:

- Groups
- Roles
- Both groups and roles

The security policy can require authorization to purge and requires a user to belong to the group that has purge authorization.

See Manage HR Groups and Manage HR roles.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Default Security Policies**.
2. Click **New** or an existing default security policy to edit.
3. Fill in the fields as appropriate.

Security Policies fields

Table	Description
Description	Phrase that describes the HR employee document security policy.
Application type	Application associated with the security policy.
Active	Option for enabling or disabling the security policy. When you disable a security policy, it implies that the security policy will be associated

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Table	Description
	with the document type, but will not be considered for evaluation.
Applies when	Filters defining additional conditions on a security policy.

4. Click **Submit** or **Update**.

Add or modify document security policies

Many employee documents contain confidential and personal information. Use document security policies to define access to employee documents and ensure that they are secure.

Before you begin

Role required: sn_hr_ef.admin

About this task

You can determine who can read, write, or authorize purging of documents by adding or modifying document security policies.

Note: You can provide employees visibility into their own employee documents through their HR profile. Check the **Employee access** box on the **Document type** form. See Define policies for a document type.

Users are granted access to employee documents by:

- Groups
- Roles
- Both groups and roles

The security policy can require authorization to purge and requires a user to belong to a group that has purge authorization.

See Manage HR Groups and Manage HR roles. Or see Groups and Roles.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Security Policies**.
2. Click **New** or an existing security policy to edit.
3. Fill in the fields as appropriate.

Security Policies fields

Table	Description
Description	Phrase that describes the HR employee document security policy.
Application type	Application associated with the security policy.
Active	Option for enabling or disabling the security policy.

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Table	Description
	When you disable a security policy, it implies that the security policy will be associated with the document type, but will not be considered for evaluation.
Applies when	Filters defining additional conditions on a security policy.

Use the three tabs to determine what groups or roles are required to search, access, and edit meta data for an employee document by document type. You can also define what groups receive purge notifications or can authorize purging of employee documents.

Security Policy tabs

Tabs	Description
Read	Groups: Groups a user must belong to search and read an employee document with the associated document type and security policy. Roles: Roles a user must have to search and read an employee document with the associated document type and security policy. **Note:** Users with the Employee Document Management Reader [sn_hr_ef.document_reader] role must also be added here to search and read documents associated with the document type and security policy. Match all: Determines if both the conditions for groups and roles must be met for access. **Note:** If you leave unchecked, the user only has to meet conditions from either Groups or Roles, not both.
Write	Groups: The groups a user must belong to access. Roles: Roles a user must have to search, read, and create an employee document with the associated document type and security policy. **Note:** Users with the Employee Document Management Writer [sn_hr_ef.document_writer] role must also be added here to search, read, and create documents associated with the document type and security policy.

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Tabs	Description
	Match all: Determines if both the conditions for groups and roles must be met for write access. **Note:** If you leave unchecked, the user only has to meet conditions from either Groups or Roles, not both.
Authorize Purge	Authorization is required to purge documents, or send a notification before the purge process runs. Groups: Group a user must belong to authorize or be notified of an upcoming purge. **Note:** Only one person in the group is required to authorize.

4. Click **Save** and the **Document Types** related list appears.
5. Click **New** and you can create a document type to be associated with the security policy.
6. Click **Submit** or **Update**.

Add or modify expiration policies on a document type

Add or modify expiration notification policies on a document type. Allow setting an expiration date on a document and sending email notifications to document owners, managers, or HR representatives when the document expires or nearing its expiration.

Before you begin

Role required: admin

About this task

Certain documents, such as passports or training certificates, have expiration dates. For organizations to adhere to compliance policies, the latest versions of employee documents are to be maintained. With this feature, an administrator can set up expiration notification policies on a document type and a user can set an expiration date for a document while uploading it to Employee Document Management or when moving a case to Employee Document Management.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Expiration Notification Policies**.
2. Click **New**.
3. On the form, fill in the fields:

Expiration Notification Policy form

Field	Description
Document type	Document type on which the expiration policy is set. For example, Education Agreements.
Name	Name that you specify for the expiration notification policy.

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Field	Description
Order	Order that you specify for an expiration policy. Assume that a document qualifies two expiration notification policies, then the policy with lesser order is given higher priority.
Active	Option to activate the expiration policy for use.
Add filter criteria	
HR criteria	HR criteria defines the audience on whom you want to apply filter conditions. For example, US employees: Tax forms collection.
Applies when	Filter conditions that you want to apply on fields of employee document.
Match both	When there is more than one filter condition, enable this option. Documents are filtered based on all conditions specified.

4. Click **Submit**.

What to do next

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Expiration Notification Policies**.
2. Open the required expiration notification policy.
3. In the **Expiration Notification Recipients** related list, add recipients:

Expiration Notification Recipient form

Field	Description
Name	Name for the expiration notification recipient.
Data offset type	Date offset type relative to the expiration date of the document. For example, do you want to send a notification before or after the expiration date.
Data offset units	Number of days, weeks, or months that defines your offset units.
Data offset quantity	Value specified for data offset. For example, assume you have selected Data offset type as **Before**, Date offset units as **Days**, and Date offset quantity as **3**, then email notifications will be sent three days before the expiration date of the document.
Expiration notification policy	Expiration notification policy for which recipients are being created.
Recipients	Recipients for notifications could be selected from the fields supported on an employee document. **Note:** If you want to notify different recipients on different days, you can configure multiple expiration notification recipients for a single expiration notification policy.
Active	Option to activate the expiration notification recipient.

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4. In the Groups section, add groups to which you want to send notifications. Groups receive notifications at the same time as the recipients.
5. Click **Submit**.

Using Employee Document Management

Manage employee documents and learn about bulk imports.

Managing employee documents

Use Employee Document Management to search, create, move, or manage legal holds on employee documents.

Employee Document Management is your virtual file cabinet containing any or all your organization's employee documents. With Employee Document Management, you can:

- Search for employee documents: There are many ways you can use to narrow down your search for employee documents.
- Create employee documents:
  - Employee documents can be added directly to the document repository.
  - When combined with HR Service Delivery, HR agents can move documents from an HR case or add directly to the document repository.
- Place an HR profile or document type on legal hold: Placing an HR profile or document type on legal hold prevents associated employee documents from being purged after the retention period has been reached.
- Move employee documents: When employee documents are attached to an HR case, you can manually move them to the document repository. Or, you can configure HR services to automatically move employee documents when the case is closed/complete.
- View employee documents: Employees can view their own employee documents on the service portal or Employee Center. Here Define policies for a document type is how you give them access by document type. The base system provides example document types.

Searching for employee documents

Search for and view employee documents using different filters from the employee document repository. You can also download documents for audit purposes.

Before you begin

Role required: sn_hr_ef.document_reader

About this task

Employee Documents is the repository for employee documents. No matter how large your repository of employee documents is, you can search on the fly or set up pre-set search filters to find the documents you need quickly.

Procedure

1. Navigate to **All** > **HR Profile** > **Employee Documents** > **Search Documents**.
2. Use the column filters to identify documents you are looking for.
   For example, sorting on the Employee column shows all documents by employee.
3. To download documents, select the check the box next to the documents and then select **Download** from the Actions choice list.
   Downloading multiple documents with the same name appends each document with the employee name. A number is added when documents are still duplicated.

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4. To view more information about a document, click the document name.
   If **Yes** is checked in the**sn_hr_ef.enable_document_viewer** Employee Document Property, the employee document appears.

Create or modify an employee document

With the employee document writer [sn_hr_ef.document_writer] role, you can create or upload an employee document directly to the employee document management repository.

Before you begin

Role required: sn_hr_ef.document_writer

About this task

Documents can also be uploaded from the HR case form and then moved to the document repository.

Note: Employee documents can also be moved from the HR case form automatically when the case is closed by configuring the HR service. For information on configuring this feature, see Configure an HR service.

Procedure

1. Navigate to **All** > **HR Profile** > **Employee Documents** > **Create New Document**.
2. On the form, fill in the fields.

Employee Document form

Field	Description
Document	Employee document to upload. Click **Choose File** to upload an employee document. **Note:** By default, the maximum size of a document allowed is 30 MB. The default can be changed from the **Maximum file upload size in megabytes** field in Employee Document Properties. For more information, see Properties for Employee Document Management application. After selecting a document, the read-only fields show the file size, file format, created on, and created by. The viewer within the UI only supports viewing .pdf documents. Other types of documents can be downloaded and then viewed. For optimal search results, do not use dashes (-) in the name of the document. Using full words separated by spaces or underbars provides better search results.

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Field	Description
	The **Enable "Document Viewer" to preview pdf documents** in the Employee Documents property must be checked **Yes** to view .pdf documents. **Note:** Viewing documents is not supported for FedRAMP, on-premise customers, mobile devices, customers using edge encryption, or encryption support.
Description	Description of the employee document.
Employee	Name of the employee the document is associated with.
Payroll country	Payroll country of the employee at the time of document creation. **Note:** When you upload the document or move the case attachments to employee file, the value in the **Payroll country** field defaults to the user profile of the employee.
Document type	Document type associated with the employee document. Document types provide categorization and the retention policy. **Note:** ○ You can read and write a document only if you fulfill the read or write configuration requirement of at least one security policy associated with the document type. ○ You can purge a document only if you fulfill the purge authorization configuration requirement of at least one security policy associated with the document type. ○ You can receive a purge notification only if you fulfill the purge authorization or notification configuration requirement of at least one security policy that is associated with the document type.
Effective date	Date and time from when the employee document is valid. In general, effective date takes the date of document creation, except in cases of contractual agreements. For example, the pay increase or promotion

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Field	Description
	might come into effect from a date different from the date of the performance appraisal.
HR case	HR case number the employee document is associated with when moved from an HR case.
Purge hold	Purge hold status of a document. ○ Pending purge authorization: Purge notification has been sent out, but authorization has not been received. ○ Purge Approved: Purge authorization was received, the document is scheduled to be purged. ○ Purged Rejected: Purge authorization was rejected, the document is not scheduled to be purged. The security policy associated with a document type sets purge authorization. The following roles have permission to change purge authorization: ▪ EF admin [sn_hr_ef.admin] ▪ Employee File Management Manager [sn_hr_ef.manager]
Expiration date	Option to set an expiration date for a document. Email notifications will be sent to document owners, managers, or HR representatives (as per expiration policies) when the document expires or is nearing its expiration. **Note:** This option is enabled only when an administrator enables the **Expiration date** check box.

3. Click **Submit** to create the employee document record.
The Employee Document Audit Trail related list tab appears.

   Provides view of all actions for an employee document from creation or uploaded to the time it is purged.

   The following actions are captured:

   ○ Record created
   ○ Fields updated
   ○ Attachment removed
   ○ Attachment updated
   ○ Attachment renamed
   ○ Platform tag added
   ○ Platform tag removed

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- Document viewed
- Document downloaded
- Document downloaded by employee on Employee Center

Move employee documents to the document repository

You can move employee documents from an HR case to the employee document repository. You can also move employee documents automatically by HR service when an HR case is closed complete.

Before you begin
Role required: sn_hr_ef.document_writer or sn_hr_core.case_reader

About this task
Employee documents can also be added directly to the employee document repository. The employee document repository provides a central repository for quick and easy identification using different sorting features. See Create or modify an employee document.

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**.
2. Select a case that has employee documents attached.
   From the list view, there is no way to identify HR cases with employee documents attached. The HR case number or the Opened for person are required to locate an HR case.
3. From the form header, click **Move Attachments**.
   The **Move Attachments to Employee File** menu appears.
4. Select the check box next to the documents you want to move.
   The **Select COE for attachments to be moved** and **Topic Detail** fields can be modified, but only if the document was added under the wrong type of HR case.
5. Select the **Document Type** for each document.
   The document type determines categorization, who can access it, and the retention policy. If no document type appears for the associated topic detail, one should be created to ensure correct categorization. See Define policies for a document type.
6. Click **Move Selected**.

Result
The employee documents move from the HR case to the employee document repository. After an employee document is moved, the file name, format, and size are copied from the attachment to the document.

Note: You can also automate this process by checking the **Automatically move attachments** box from HR services. See Configure an HR service.

What to do next
Once you have moved the attachments, the attachments are displayed in the Employee Documents section in the case.

Add or remove a legal hold for employee documents

Legal or litigation holds prevent the deletion of documents related to a document type or all employee documents for an HR profile.

Before you begin
Role required: sn_hr_ef.admin, sn_hr_ef.manager, sn_hr_core.profile_writer, sn_hr_ef.legal_hold_writer

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About this task

A legal hold suspends all retention policies for associated employee documentation.

Note: If you are logged in as System Admin [admin], ensure that you are viewing in the Employee Document Management scope. If you change your scope, you also have to refresh the page.

A legal hold prevents the purging of documents only by out-of-box document clean-up mechanism. It is not applicable to custom clean-up mechanisms, such as custom table cleaners or table archival rules.

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
2. Select an HR profile you want to place on legal hold.
3. Click **Add Legal Hold** in the form header.
4. From **Add legal hold on this profile**, select a reason and add comments.
5. Click **OK**.
6. Add comments.
7. Click **OK**.
8. To place a document type on legal hold, navigate to **HR Administration** > **Employee Documents** > **Document Types**.
9. Select a document type.
10. Click **Add Legal Hold**.
    The **Add Legal Hold** button is in the form header.
11. Add comments.
12. Click **Ok**.
13. Click **Update**.
    All documents associated with the document type are placed on legal hold and are not purged based on the retention policy.

Add legal hold to multiple HR profiles

Add legal hold to multiple HR profiles at one time. Legal or litigation holds prevent the deletion of employee documents for an HR profile.

Before you begin

Role required: sn_hr_ef.admin, sn_hr_ef.manager, sn_hr_core.profile_writer, sn_hr_ef.legal_hold_writer

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
2. In the list view, select all the HR profiles on which you intend to apply legal hold.
3. In **Actions on selected rows**, select **Add Legal Hold**.
4. In the Add legal hold dialog box:

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a. In the **Reason** field, select a value.

b. In the **Comments** field, add more details.

c. Click **OK**.
Employee documents of selected HR profiles are placed on legal hold and are not purged based on retention policy.

Add legal hold to multiple document types

Add legal hold to multiple document types at one time. Legal or litigation holds prevent the deletion of documents related to a document type.

Before you begin
Role required: sn_hr_ef.admin, sn_hr_ef.manager, sn_hr_core.profile_writer, sn_hr_ef.legal_hold_writer

Procedure

1. Navigate to **All** > **HR Administration** > **Document Types**.
2. In the list view, select all documents on which you intend to apply legal hold.
3. In **Actions on selected rows**, select **Add Legal Hold**.
4. In the Add legal hold dialog box:
   a. In the **Reason** field, select a value.
   b. In the **Comments** field, add more details.
   c. Click **OK**.
   Documents associated with selected Document Types are placed on legal hold and are not purged based on the retention policy.

Manage documents on legal hold

You can view a list of all document types or HR profiles that are currently under or had been under a legal hold. You can review the reasons a document type or HR profile was placed on legal hold and remove the legal hold.

Before you begin
Role required: sn_hr_ef.legal_hold_writer

About this task
Legal holds are placed on employee documents by HR profile or by document type. See Add or remove a legal hold for employee documents.

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Legal Holds**.
2. Select a document type or HR profile.
3. Change the **Legal hold reason** if applicable.
4. Enter **Comments**.
5. Click **Update**.

View employee document purge logs

For optimal system performance and depending on your internal processes, employee documentation is purged based on the security policy established by your company.

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Before you begin
Role required: sn_hr_ef.manager

About this task
Purging permanently deletes employee documents from the instance. Purging frees up overall storage.

- The purge log shows what documents were deleted.
- Attributes of the deleted documents are stored.
- The default attributes that identify deleted documents are employee and HR case number. You can change the default in the Properties for Employee Document Management.

See Properties for Employee Document Management application.

Procedure

Navigate to **All** > **HR Administration** > **Employee Documents** > **Purge Logs**.
A list of purged documents with the fields specified in the **These fields will be included in the purge logs if enabled** of Properties for Employee Document Management Application appear.

Employee document management bulk imports

Use the Employee Document Management Bulk Imports feature to copy your employee documents from an external third-party cloud-based storage or a local network directory to Employee Document Management. Having your employee documents within HR Service Delivery makes administration efficient and convenient.

Note: Starting with the Zurich release, Bulk Import for EDM is being prepared for deprecation. If you're an existing customer, you can continue using this feature as-is, with no new functionality. New customers will not have access to this feature.

- You can use the **Stage local files** workflow in Employee document management to import files using the SSH protocol through MID server.
- The **Stage local files** workflow will be available only if you have installed the Orchestration plugin (com.snc.runbook_automation). The SSH related activities in this workflow are available as part of the Orchestration plugin only.

If you currently store your employee documents outside of HR Service Delivery, you can consolidate and maintain these documents over the duration of your employees tenure.

Your current document repository

Where you currently store your employee documents determines bulk import configuration. The Employee Document Management bulk imports feature provides integration with:

- Local document storage solution.
- Third-party, cloud-based document storage solutions.

Configuring local document storage

Activating the Orchestration [com.snc.runbook_automation] plugin is required for importing employee documents from a local document repository.

Note: Java JRE 6 or later is also required.

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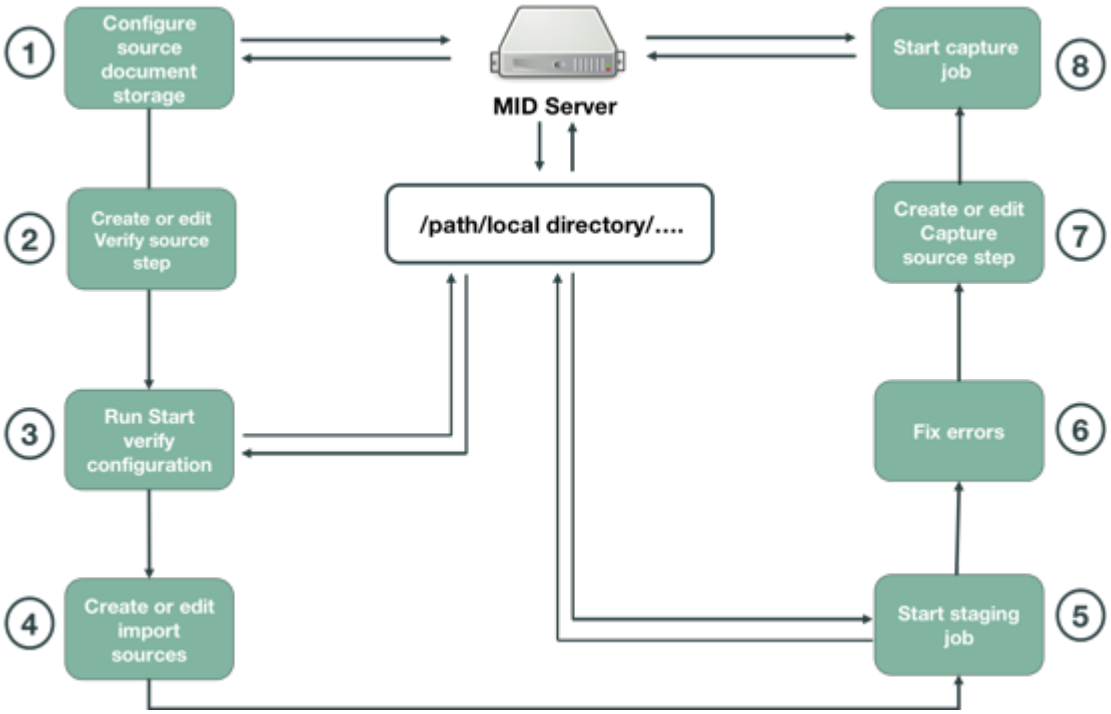

The process for configuring HR Service Delivery with a local document repository is:

1. Configure HR Service Delivery to communicate with the source location from Employee Document Import Configuration.

   Before you can configure a local document storage, ensure that a MID Server is configured and available. A MID server is required to facilitate communication and movement of data between a ServiceNow instance and applications, data sources, and services.

   Important: By default, this feature expects the file server to be UNIX. If the file server is any OS other than UNIX, then you must customize the solution.

   - Only Secure Shell Protocol (SSH) credentials are supported.
   - The MID server can be on a Windows or Linux server. The server that hosts the files to be imported must be non-windows.

     Note: Other methods of configuring your local document storage requires custom development.

   Create a credential to use for authentication with the local document storage. See Set up SSH credentials to the MID Server.

   Note: When connecting to a local document repository, you may need to grant admin rights.

2. Create or edit the Verify source step. This step creates a source step required to validate the connection between your local directory and Employee Document Management.

   Note: Having your source employee documents in a central repository, simple directory structure, and consistent file naming convention is highly recommended and reduces errors.

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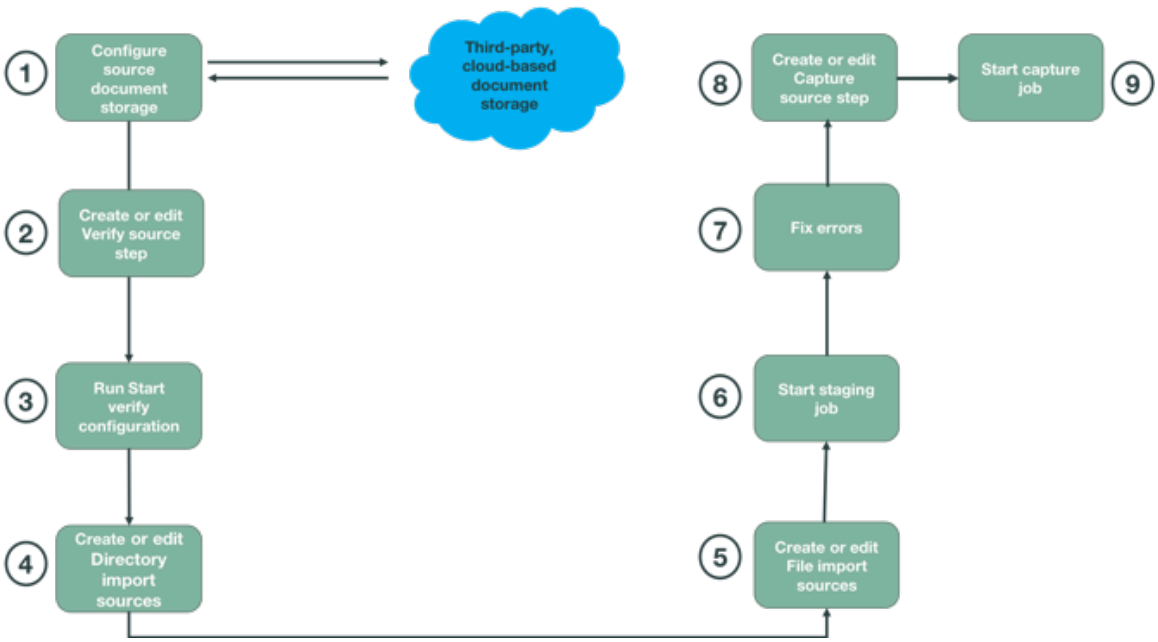
3. Run the Start verify source job to verify the connection and validate source employee documents are identified and located.
4. Create or edit the Employee Document Import Sources. This step identifies the source documents you want to import from your local document storage to Employee Document Management.
5. Run the staging job. This step saves information about your source employee documents into the Employee Document Staging [sn_hr_ef_import_staging] table. All required information to import the employee document is contained in this record.
6. Verify that steps 3 and 4 are correct by viewing your staging records. You can fix errors in the staging table.
7. Create or edit the Capture Source step. This source step imports the staging records and source employee documents to Employee Document Management.
8. Start the Capture job that processes the staging records that have a state of **Ready** and pulls or looks up the source employee documents. Your source employee documents are copied to Employee Document Management.

Configuring third-party, cloud-based document storage

Activating the ServiceNow IntegrationHub Installer [com.glide.hub.integrations] plugin is required for importing employee documents from a third-party, cloud-based document repository.

Note: Integrating with a third-party, cloud-based document storage is considered a custom implementation. Employee document management bulk imports provides a basic framework to integrate with third-party, cloud-based document storage. You may need to consult with your ServiceNow Solution Consultant.



You need the following to configure with your third-party cloud-based (source) document repository:

- The URL to your source document repository.
- Credential alias.

The process for configuring HR Service Delivery with a third-party cloud-based document storage is:

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1. Configure HR Service Delivery to communicate with the third-party, cloud-based source document repository.
2. Create or edit the Verify source step. This step creates a source step required to validate the connection between your third-party, cloud-based document repository and Employee Document Management.

   Note: Having your source employee documents in a simple directory structure and consistent file naming convention is highly recommended and reduces errors.

3. Run the Start verify source job to verify your connection from your third-party, cloud-based document repository is communicating with Employee Document Management.
4. Create or edit the Directory import sources step. This step identifies the directory your source documents are located in your third-party, cloud-based document storage.
5. Create or edit the File import sources step. This step identifies the source documents you want to import from your third-party, cloud-based document storage to Employee Document Management.
6. Run the staging job. This step saves information about your source employee documents into the Employee Document Staging [sn_hr_ef_import_staging] table. All required information to import the employee document is contained in this record.
7. Verify that steps 3 and 4 are correct by viewing your staging records. You can fix errors in the staging table.
8. Create or edit the Capture Source step. This source step imports the staging records and source employee documents to Employee Document Management.
9. Start the Capture job that processes the staging records that have a state of **Ready** and pulls or looks up the source employee documents. Your source employee documents are copied to Employee Document Management.

File size limitations

The base system allows you to import employee documents that are 30 megabytes or smaller.

Use the **sn_hr_ef.max_file_size** field in the Properties for Employee Document Management Application to set the maximum file size allowed.

Note: Increasing the maximum size can affect system performance.

For more information, see Properties for Employee Document Management application.

Use import mapping to locate and transform source employee documents

Import mapping locates your source employee documents from your source document repository and transforms them to import them to Employee Document Management.

Import maps define mapping variables used to acquire meta data from the source document repository. It also allows you to correctly identify the employee documents you want to import and maps them to required elements in Employee Document Management.

The required elements for a local network directory:

- Employee name
- Document type
- File name

The required elements for a third-party, cloud-based directory:

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- items
- item
- Employee name
- Document type
- File name
- url

Parsing for fields and values from an output file

If your source document repository provides an output file, you can transform mapping locates, parse, and map the output file into values that Employee Document Management requires. To transform an output file, do the following:

- Create a Field mapping type that finds an array of items in the output file (JSON is an example of an output file).
- Create a Field mapping type that for each item in the array that locates the file ID.
- Create a Field mapping type that locates the employee mapped element.
- Create a Field mapping type that locates the docType mapped element.
- Create a Field mapping type that locates the fileName mapped element.
- Create a Field mapping type that locates the url mapped element.

Extracting from a file name

If your source employee documents have:

- A consistent naming convention.
- The employee file has all required meta data in the file name.

You can use import maps to locate and transform the source employee document into values that Employee Document Management requires.

For example, your employee documents have a consistent naming convention: Abel_Tuter_LOARequestLeave.pdfYou can map parts of the file name to the required elements for Employee Document Management:

- Employee name: abel.tuter
- Document type: LOARequestLeave
- File name: Abel_Tuter_LOARequestLeave.pdf

Scripting

You can also use scripts to map source elements to the required map elements for Employee Document Management. See Scripts.

Note: The base system provides import map examples you can use as models.

Configuring employee document management bulk import with source document repository

Use Employee Document Import Configuration to identify and communicate with the source document repository. The source document repository is where you currently store your employee documents.

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Before you begin
Role required: sn_hr_ef.admin, sn_hr_ef.document_import

About this task
Before you can move your employee documents from your source document repository, you must:

- Identify the type of repository you are pulling documents from.
- Identify the URL and credentials from the repository you are pulling documents from. Or, identify the directory you are pulling documents from.
- Test to make sure that there is communication from your source repository and Employee Document Management.

Procedure
1. Navigate to **All** > **HR Administration** > **Bulk Import** > **Import Configuration**.
2. Fill in the fields on the form.

Employee Document Import Configuration

Fields	Description
Name	A descriptive name that identifies your employee document bulk upload configuration.
Source type	Identifies the source you are moving employee documents from. ○ Local: The source employee document repository is local. ○ URL: The source employee document repository is cloud-based.
Host	Appears when **Local** is selected from **Source type**. The IP address of the local source employee document repository you are pulling from. When pulling from a local directory, the IP address of the source connected via the MID server.
URL	Appears when **URL** is selected from **Source Type**. The URL of the source third-party, cloud-based document repository.
Directory	The directory in the source employee document repository you are pulling from. For Local source type, you can specify a recursive directory structure. For third-party, cloud-based (URL) source type, you can only specify the root directory.

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Fields	Description
	Note: If you have multiple directories in your third-party, cloud-based repository, a separate Employee Document Import Configuration is required for each one. Use the **Clone Configuration** button to make cloning easier.
Staging record state	The state assigned to the imported employee document staging records before being inserted into the employee documents. ○ Draft: Allows you to verify the staging records prior to inserting into the employee documents. **Note:** Use the **Draft** state as the default in a testing environment when adjusting your mapping configurations. Employee documents that have a **Draft** state must be changed to **Ready** before the Capture step can process it. ○ Ready: When the staging records for employee documents are accurate and does not require verification, use this state. You can still fix any errors that occur. The state changes to Error when verification cannot be confirmed. **Note:** Use the Ready state as the default in a production environment after testing ensures that your mapping configurations are error-free. Employee documents in the Ready state process automatically in the Capture step.
Credential alias	The connection and credential alias ID that labels a credential or connection record. The credential alias is required to connect to the local source document repository. The credential alias is configured from the local document repository. The credentials to access the local document repository are stored on the instance and tagged with the alias.
Domain	Automatically populated via domain separation and identifies the specific domain you are configuring employee documentation bulk uploads for.

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Fields	Description
Log mapping	Indicates that you want to write debug statements to the system log during the staging phase. Log mapping provides an easier debugging of mapping. Recommended when first configuring bulk imports during the testing phase.

Note: For more information on credentials and aliases, see Introduction to credentials, connections, and aliases.

For more information on domain separation, see Domain Separation and HR Service Delivery.

3. Select **Save**, **Submit**, or **Update**.
   The Employee Document Import Sources and Employee Document Import Map tabs appear.

Create or edit import configuration

To import employee documents, map the source employee documents from your local document repository or third-party cloud-based repository to Employee Document Management.

Before you begin
Role required: sn_hr_ef.document_import

About this task
For a local document repository, name mapping acquires file meta data from the file name.

Procedure
1. From **Employee Document Import Configuration** form, click the **Employee Document Import Map** tab.
2. Click **New** or on an existing import configuration.
3. Fill in the form.

Employee Document Import Map

Field	Description
Configuration	The name of the employee document bulk import configuration. See Configuring employee document management bulk import with source document repository.
Mapping type	Defines how you are locating the source employee documents within your source document repository. ○ Field: Indicates that within an array of information about your source document you want to identify a specific part of the array to map.

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Field	Description
	○ Value: Indicates that you are identifying a specific term within an array of information from your source document you want to map.
Regex	The regular expression string that identifies files you want to include from the source repository. For example, (\w+)_(\w+)_(\w+).(\w +) matches file names that contain alphanumeric, underscore, and a period. Once you have identified specific parts of information in the array, you can then map it. The more consistent your existing naming convention, the easier to locate your employee documents from your source repository,
Replace	The information you want the source employee document to contain when imported to Employee Document Management. For example, the array for your source employee document has school. You want the new value to equal transcripts for document type. Enter: ○ Replace: transcripts ○ Mapped element: docType ○ Source element: school **Note:** You can also use regular expressions (RegEx) to define the replacement value. When using RegEx, use a regular expression test site to ensure correct parsing.
Mapped element	Determines what meta data field is acquired and the value included in the final staging record created. Fields from the Import Document Staging [sn_hr_ef_import_staging] table that you want to map your source employee documents to. The base system provides the following fields you can map your source employee documents to: ○ docType: Document type ○ fileName: File name ○ employee: Employee name

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Field	Description
Source element	The field or value from a local or third-party cloud-based employee document repository you want to map to Employee Document Management. For example, if your source file name contains the employee name, you can use the employee name as the source element and use the Mapped element of employee.
Filter regex	A regular expression sequence that matches text found in the array from your source employee document repository. Use this field to refine your identification of source employee documents.
Filter field	Locates specific text found in the array of information returned from the source repository when files matching the Regex are imported. **Note:** You can also use regular expressions (RegEx) to define the replacement value. When using RegEx, use a regular expression test site to ensure correct parsing. Use this field to help refine the information you want mapped. For example, to import only files with a file name formatted first_last_xxx.pdf (abel_tuter_tuition.pdf): ○ Regex: (\w+)_(\w+)_(\w+).(\w+) ○ Mapped element: fileName ○ Source element: fileName ○ Filter field: .pdf

File name example

The example file name is abel_tuter_tuition.pdf.

To find and extract the file name from the source repository, see this example:

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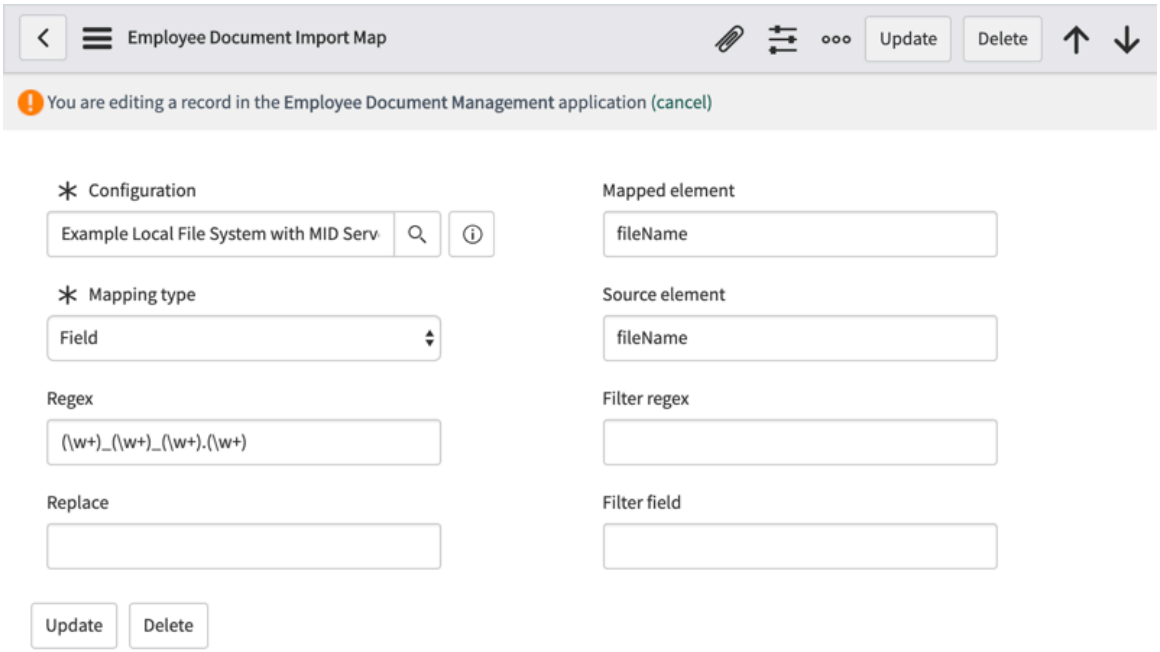


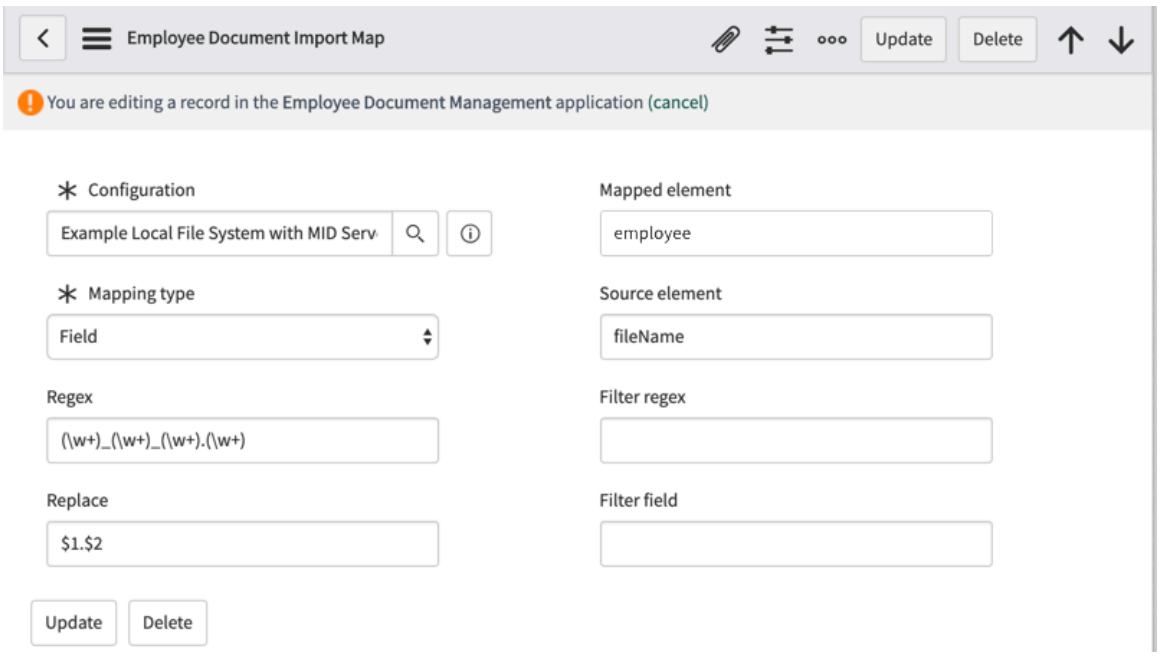
The import map is looking for a source element called fileName.

The import map is going to translate this source element to a mapped element called fileName.

The Regex is looking for the format of the file name first_last_xxx.pdf.

File name to employee name example

From the file name, the employee name is extracted. Employee name is a requirement for Employee Document Management.



The import map is looking for a source element called fileName.

The import map is going to translate this source element to a mapped element called employee.

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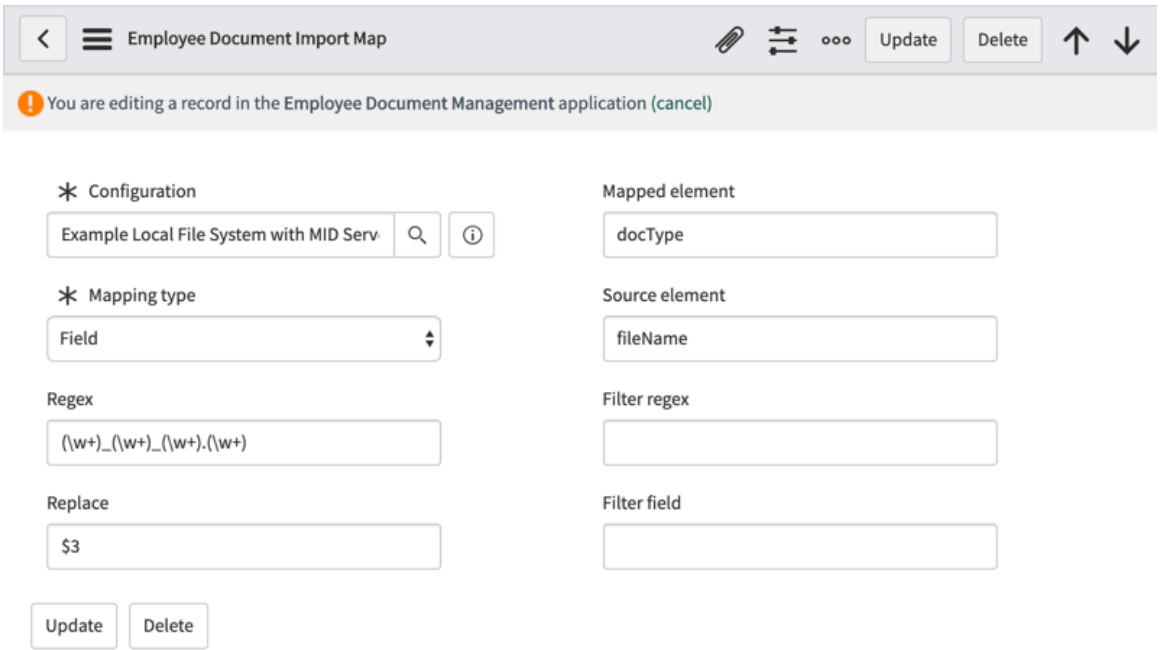
The Regex is looking for the format of the file name to be first_last_tuition.pdf (\w+)_(\w+)_(\w+).(\w+).

It replaces the original file name with first.last ($1.$2)

File name to document type example

From the file name, the document type is extracted. Document type is a requirement for Employee Document Management.



The import map is looking for a source element called fileName.

The import map is going to translate this source element to a mapped element called docType.

The Regex is looking for the format of the file name to be first_last_tuition.pdf (\w+)_(\w+)_(\w+).(\w+).

It creates a docType of tuition ($3).

4. Click **Submit** or **Update**.

Create or edit the verify source step

Use Employee Document Import Jobs to create a Verify source step. Verify is required to validate the connection between your local directory or your third-party, cloud-based document repository and Employee Document Management. The Verify source step also validates that source employee files are there to be processed.

Before you begin

Role required: sn_hr_ef.admin, sn_hr_ef.document_import

About this task

The base system provides a sample Verify source step you can use as a model.

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Procedure

1. Navigate to **All** > **HR Administration** > **Import Configuration**.
2. Click an existing Import Configuration record.
3. From the Employee Document Import Source tab, click an existing Verify source step or **New**.
4. Fill in or edit the form.

Employee Document Import Source — Verify

Field	Description
Configuration	A descriptive name that identifies your employee document bulk upload configuration.
Source step	The import step that makes up the import job. Select Verify. Verify: Ensures the connection between the Employee Document instance and source repository (third-party cloud-based or local) is configured correctly and can communicate.
Import type	The import type that drives the source step. You can select the method that drives the source step. ○ Sub flow: A workflow launched by another workflow to drive the import step. See Workflows used as subflows. ○ Flow action: The Flow Designer action that drives the import step. See Flow Designer. ○ Workflow: An automated way to provide a multi-step process. See Workflow. ○ Script: Use to automate the import step. See Scripts.
Application	The application the import source is used in.
Domain	Automatically populated via domain separation and identifies the specific domain you are configuring employee documentation bulk uploads for.
Sub Flow Action Workflow Script	The subflow, flow action, workflow, or script that launches the source step based on the import type. For example, if you are using Flow Action as your Import type, the Action drop-down appears to select the action you previously created.

5. Click **Submit** or **Update**.
6. Click the **Start verify configuration** related link to start the verify job.
   The **Employee Document Import Jobs** tab appears with the Verify job in the **Queued** state.

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7. Reload the form to see if the import step validated.
   Validated indicates that the credentials are correct, the directory is valid, and shows the number of source employee files found in the directory.

Create or edit the stage directory lookup source step

Use Employee Document Import Jobs to create or edit the Stage Directory source step.

Before you begin

Role required: sn_hr_ef.admin, sn_hr_ef.document_import

About this task

Stage directory is required to locate your source employee documents from your local or third-party, cloud-based document repository. This step also uses the mapping to parse file names and create a record in the staging table for each of the files with the parsed data.

The base system provides a sample Stage - Directory source step you can use as a model.

Procedure

1. Navigate to **All** > **HR Administration** > **Import Configuration**.
2. Click an existing Import Configuration record.
3. From the Employee Document Import Source tab, click an existing Stage - Directory source step or **New**.
4. Fill in or edit the form.

Employee Document Import Source — Stage - Directory

Field	Description
Configuration	A descriptive name that identifies your employee document bulk upload configuration. The name comes from the Employee Document Import Configuration. See Configuring employee document management bulk import with source document repository.
Source step	The import step that makes up the import job. Select Stage - Directory. Stage — Directory: Ensures that the employee documents from the source repository are located and mapped correctly.
Import type	The import type that drives the source step. You can select the method that drives the source step. ○ Sub flow: A workflow launched by another workflow to drive the import step. See Workflows used as subflows. ○ Flow action: The Flow Designer action that drives the import step. See Flow Designer.

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Field	Description
	○ Workflow: An automated way to provide a multi-step process. See Workflow. ○ Script: Use to automate the import step. See Scripts.
Application	The application the import source is used in.
Domain	Automatically populated via domain separation and identifies the specific domain you are configuring employee documentation bulk uploads for.
Sub Flow Action Workflow Script	The subflow, flow action, workflow, or script that launches the source step based on the import type. For example, if you are using Flow Action as your Import type, the Action drop-down appears to select the action you previously created.

5. Click **Submit** or **Update**.

Create or edit the stage file source step

Use Employee Document Import Jobs to create or edit the stage file source step. Stage file is required to stage your source employee documents from your third-party, cloud-based document repository.

Before you begin
Role required: sn_hr_ef.admin, sn_hr_ef.document_import

About this task
The base system provides a sample Stage - File source step you can use as a model.

Procedure
1. Navigate to **All** > **HR Administration** > **Import Configuration**.
2. Click an existing Import Configuration record.
3. From the Employee Document Import Source tab, click an existing Stage - File source step or **New**.
4. Fill in or edit the form.

Employee Document Import Source — Stage - File

Field	Description
Configuration	A descriptive name that identifies your employee document bulk upload configuration. The name comes from the Employee Document Import Configuration. See Configuring employee document management bulk import with source document repository.

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Field	Description
Source step	The import step that makes up the import job. Select Stage - File. Stage — File: Ensures that the employee documents from the source repository are located and mapped correctly.
Import type	The import type that drives the source step. You can select the method that drives the source step. ○ Sub flow: A workflow launched by another workflow to drive the import step. See Workflows used as subflows. ○ Flow action: The Flow Designer action that drives the import step. See Flow Designer. ○ Workflow: An automated way to provide a multi-step process. See Workflow. ○ Script: Use to automate the import step. See Scripts.
Application	The application the import source is used in.
Domain	Automatically populated via domain separation and identifies the specific domain you are configuring employee documentation bulk uploads for.
Sub Flow Action Workflow Script	The subflow, flow action, workflow, or script that launches the source step based on the import type. For example, if you are using Flow Action as your Import type, the Action drop-down appears to select the action you previously created.

5. Click **Submit** or **Update**.
6. Click the **Start staging job** related link.
   The staging job verifies that the source document directory and source files can be staged. The **Employee Document Import Jobs** tab appears with the Stage import step in the **Queued** state.
7. Reload the form to see if the Stage import step completed.
   The **Employee Document Staging** tab appears. You can view all source documents that are in the staging table and make corrections if necessary. See Correcting employee documents in the staging table.
8. Change staged documents that have a state of **Draft** to **Ready**.
   Staged documents must be in **Ready** state for it to be picked up in the **Capture** step. You can change the state by checking all staged documents that have a **Draft** state and selecting **Ready for import** from **Action on selected rows** or opening a specific staged document and selecting **Ready for Import**.

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Create or edit capture source step

Use Employee Document Import Jobs to create or edit the capture source step. Capture is required to import your source employee documents from your local or third-party, cloud-based document repository.

Before you begin

Role required: sn_hr_ef.admin, sn_hr_ef.document_import

About this task

The base system provides a sample Capture source step you can use as a model. The example for the local document repository provides a sample script that can be used.

Procedure

1. Navigate to **All** > **HR Administration** > **Import Configuration**.
2. Click an existing Import Configuration record.
3. From the Employee Document Import Source tab, click an existing Capture source step or **New**.
4. Fill in or edit the form.

Employee Document Import Source — Capture

Field	Description
Configuration	A descriptive name that identifies your employee document bulk upload configuration. The name comes from the Employee Document Import Configuration. See Configuring employee document management bulk import with source document repository.
Source step	The import step that makes up the import job. Select Verify. Capture: Ensures that the employee documents from the source repository are imported to Employee Document Management.
Import type	The import type that drives the source step. You can select the method that drives the source step. ○ Sub flow: A workflow launched by another workflow to drive the import step. See Workflows used as subflows. ○ Flow action: The Flow Designer action that drives the import step. See Flow Designer.

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Field	Description
	○ Workflow: An automated way to provide a multi-step process. See Workflow. ○ Script: Use to automate the import step. See Scripts.
Application	The application the import source is used in.
Domain	Automatically populated via domain separation and identifies the specific domain you are configuring employee documentation bulk uploads for.
Sub Flow Action Workflow Script	The subflow, flow action, workflow, or script that launches the source step based on the import type. For example, if you are using Flow Action as your Import type, the Action drop-down appears to select the action you previously created.

5. Click **Submit** or **Update**.
   Run the Capture job after the Verify configuration and Staging jobs have run successfully.
6. Click the **Start capture job** related link.
   The capture job imports the source documents into Employee Document Management. The **Employee Document Import Jobs** tab appears with the Stage import step in the **Queued** state.
7. Reload the form to see if the Stage import step completed and have a state of **Complete**.

Bulk import map examples

Mapping your source employee documents to required elements in Employee Document Management is crucial for a successful bulk import.

This topic provides examples on how to map your source employee documents to the required elements in Employee Document Management. The values provided are examples designed to guide you through the import map configuration.

Map fields and values directly from existing file names

Using your existing employee document file names is recommended when your source employee documents reside in a local repository.

For example, an employee document can have all the meta data in the file name Abel_Tuter_tuition.pdf to map to Employee Document Management.

Note: When using regular expressions (RegEx) to define the replacement value, use a regular expression test site to ensure correct parsing.

File name example

The example file name is abel_tuter_tuition.pdf.

To find and extract the file name from the source repository, see this example:

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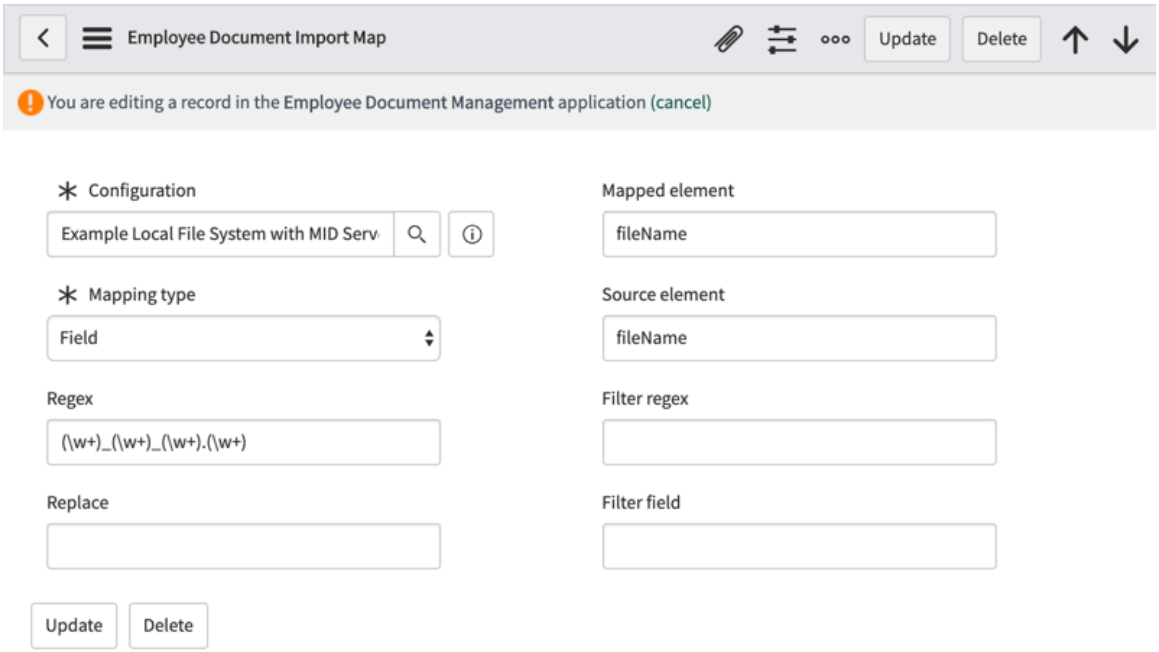


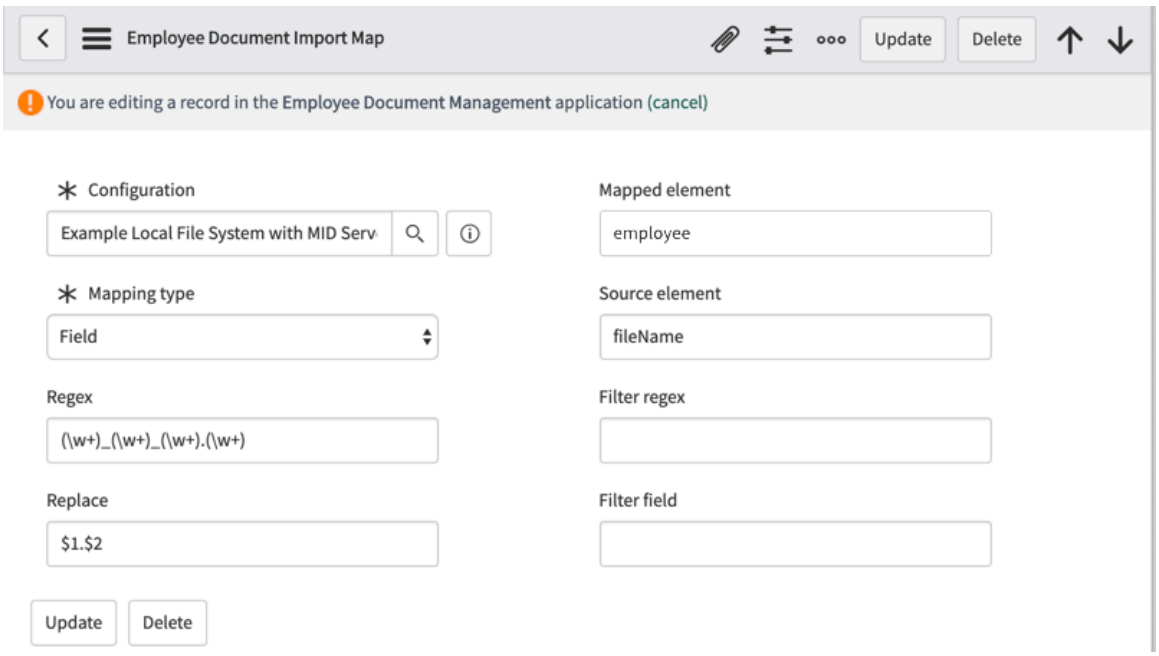
The import map is looking for a source element called fileName.

The import map is going to translate this source element to a mapped element called fileName.

The Regex is looking for the format of the file name first_last_xxx.pdf.

File name to employee name example

From the file name, the employee name is extracted. Employee name is a requirement for Employee Document Management.



The import map is looking for a source element called fileName.

The import map is going to translate this source element to a mapped element called employee.

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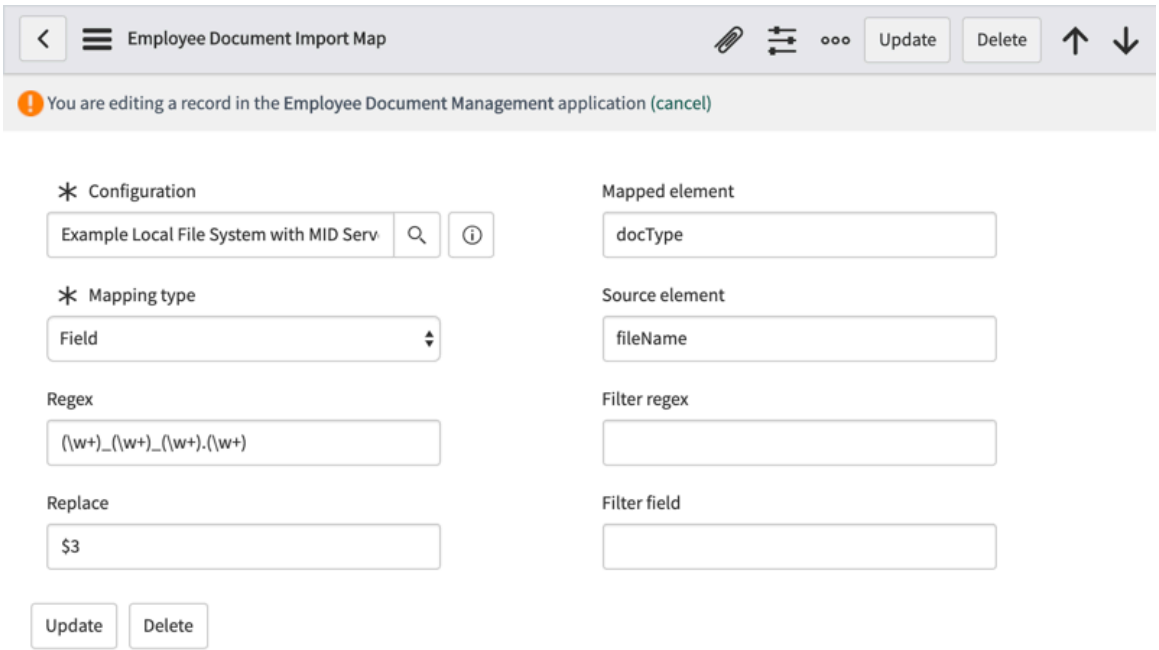
The Regex is looking for the format of the file name to be first_last_tuition.pdf (\w +)_(\w+)_(\w+).(\w+).

It replaces the original file name with first.last ($1.$2)

File name to document type example

From the file name, the document type is extracted. Document type is a requirement for Employee Document Management.



The import map is looking for a source element called fileName.

The import map is going to translate this source element to a mapped element called docType.

The Regex is looking for the format of the file name to be first_last_tuition.pdf (\w +)_(\w+)_(\w+).(\w+).

It creates a docType of tuition ($3).

Note: Having the source employee documents in a central repository, simple directory structure, and consistent file naming convention are highly recommended and reduces errors.

Parse and map fields and values from a JSON output

Using a JSON output is recommended when your source employee documents reside in a third-party, cloud-based repository.

Map record for element item

Field	Description
Mapping type	Field
Mapped element	items

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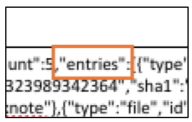
Map record for element item (continued)

Field	Description
	Looks for the items mapping element in an array of items in the folder. This mapping is used after Stage — Directory import source.
Source element	entries Source element in the JSON output and represents the items in a folder. For example, Box uses entries as the source element.



{"total_count":5,"entries":[{"type":"folder","id":"51854612204","sequence_id":"0","etag":"0","name":"Meeting Notes"},{"type":"file","id":"307557775676","file_version":{"type":"file_version","id":"323989342364","sha1":"c31e242051ab80c4c71cc6c1443788323c477fdf"},"sequence_id":"1","etag":"1","sha1":"c31e242051ab80c4c71cc6c1443788323c477fdf","name":"Admin Guide.boxnote"},{"type":"file","id":"308330516313","file_version":{"type":"file_version","id":"324842139513","sha1":"70fa4681b9e09f2ffeb35901f14bd4990f8e307e"},"sequence_id":"1","etag":"1","sha1":"70fa4681b9e09f2ffeb35901f14bd4990f8e307e","name":"Screen Shot 2018-04-30 at 12.14.20 PM.png"},{"type":"file","id":"308332929283","file_version"{"type":"file_version","id":"324844560259","sha1":"711fc4140ef489be6570659f1b99ab09b55a481c"},"sequence_id":"3","etag":"3","sha1":"711fc4140ef489be6570659f1b99ab09b55a481c","name":"sn_hiring_question.xlsx"},{"type":"file","id":"307557774812","file_version":{"type":"file_version","id":"323989341500","sha1":"92c9614354519c993b8b52a2a1da4e2d078dca89"},"sequence_id":"1","etag":"1","sha1":"92c9614354519c993b8b52a2a1da4e2d078dca89","name":"Welcome to Box.pdf"}],"offset":0,"limit":100,"order":[{"by":"type","direction":"ASC"},{"by":"name","direction":"ASC"}]}

Map record for element employee

Field	Description
Mapping type	Field
Mapped element	item Looks for item, an entry in an array of items in the folder. This mapping is used after Stage — Directory import source to run operations against a single item.
Source element	id For each item in the array, find the file ID in the JSON output.
Filter regex	file Combined with the Filter field to exclude subfolders.
Filter field	type Filter output to where the type field is equal to file to exclude subfolders.

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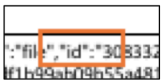

{"type":"file","id":"308332929283","file_version":{"type":"file_version","id":"324844560259","sha1":"711fc4140ef489be6570659f1b99ab09b55a481c"},"sequence_id":"3","etag":"3","sha1":"711fc4140ef489be6570659f1b99ab09b55a481c","name":"sn_hiring_question.xlsx"}

Add map records for element employee (continued)

Field	Description
Mapping type	Field
Regex	(\w+)\s(\w+) String translation to convert fname lname to fname.lname.
Replace	$1.$2 Converts files found in Regex field fname lname to fname.lname.
Mapped element	employee Looks for employee mapping element. Employee is a field in the file item. This mapping is used after Stage — file import source.
Source element	owned_by.name Looks for name in owned_by object. Bypass nested objects with a dot notation.
Filter regex	

{"type":"file","id":"308332929283","file_version":{"type":"file_version","id":"324844560259","sha1":"711fc4140ef489be6570659f1b99ab09b55a481c"},"sequence_id":"3","etag":"3","sha1":"711fc4140ef489be6570659f1b99ab09b55a481c","name":"sn_hiring_question.xlsx","description":"","size":9827,"path_collection":{"total_count":1,"entries":[{"type":"folder","id":"0","sequence_id":null,"etag":null,"name":"All Files"}]},"created_at":"2018-07-30T13:03:33-07:00","modified_at":"2018-07-30T13:03:33-07:00","trashed_at":null,"purged_at":null,"content_created_at":"2018-06-27T11:26:30-07:00","content_modified_at":"2018-06-27T11:26:30-07:00","created_by":{"type":"user","id":"3858237062","name":"Ugur Sencan","login":" developer@example.com"},"modified_by":{"type":"user","id":"3858237062","name":"Ugur Sencan","login":"developer@example.com"},"owned_by":{"type":"user","id":"3858237062","name":"Ugur Sencan","login":" developer@example.com"},"shared_link":{"url":"https://vbqya2sjg6hsw7wjq30s0qp3ltrfzg216","download_url":"https://vbqya2sjg6hsw7wjq30s0qp3ltrfzg216.xlsx","vanity_url":null,"effective_access":"open","effective_permission":"can_download","is_password_enabled":false,"unshared_at":null,"download_count":0,"preview_count":0,"access":"open","permissions":{"can_preview":true,"can_download":true}},"parent":{"type":"folder","id":"0","sequence_id":null,"etag":null,"name":"All Files"},"item_status":"active"}





Add map record for element employee (alternative)

Field	Description
Mapping type	Value Selecting **Value** maps the employee element within an array of information from your source document to a specific value in Employee Document Management.
Replace	david.loo The value you want to replace the source element with in Employee Document Management.

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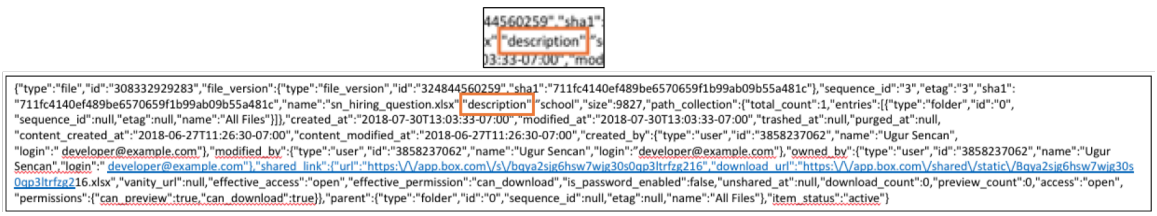
Add map record for element employee (alternative) (continued)

Field	Description
	Employee Document Management requires employee names to be formatted fname.lname.
Mapped element	employee Looks for the **employee** mapping element that is a field in the file item. This mapping is used after Stage — file import source.
Source element	davidl Looks for the source value of davidl.

This example illustrates how to use Value mapping to take an employee name from your source document and map it to the format that Employee Document Management requires.

Add map records for element docType

Field	Description
Mapping type	Field
Mapped element	docType Looks for the docType mapping element embedded in the description field in the file item. This mapping is used after Stage — file import source.
Source element	description Looks for name in description.
Filter regex	



Add map records for element docType (continued)

Field	Description
Mapping type	Value

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Add map records for element docType (continued) (continued)

Field	Description
	Use Value to map a specific value in your third-party, cloud-based repository to a value in Employee Document Management.
Replace	employee verifications Replace verification (source) with employee verifications (Employee Document Management).
Mapped element	docType Looks for the docType mapping element embedded in the description field in the file item. This mapping is used after Stage — file import source.
Source element	verification Look for the name value of verification in the JSON.

Add map records for element docType (continued)

Field	Description
Mapping type	Value Use Value to map a specific value in your third-party, cloud-based repository to a value in Employee Document Management.
Replace	transcripts Replace school (source) with transcripts (Employee Document Management).
Mapped element	docType Looks for the docType mapping element embedded in the description field in the file item. This mapping is used after the Stage — file import source.
Source element	school Looks for the name value school.

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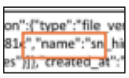
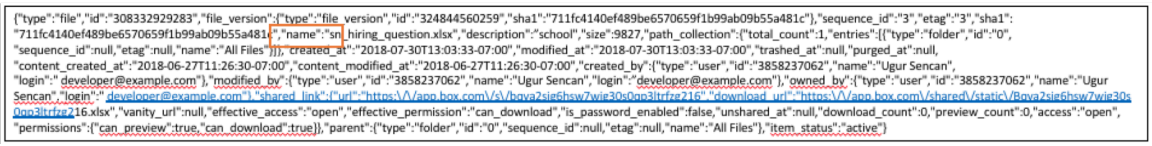
Add map record for element fileName

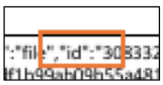
Field	Description
Mapping type	field
Mapped element	fileName Looks for the fileName mapping element embedded in the name field in the file item. This mapping is used after Stage — file import source.
Source element	name Looks for filename in the description in the JSON output.
Filter regex	

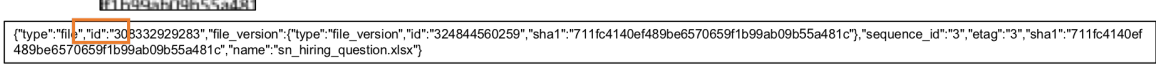




Add map record for element url

Field	Description
Mapping type	field
Mapped element	url Looks for the url mapping element embedded in the id field in the file item. This mapping is used after Stage — file import source.
Source element	Looks for id in JSON output. **Note:** some third-party, cloud-based repositories use the file ID. The capture import source builds a URL from this value.





Bulk import mapping records

An example of Employee Document Import Map.

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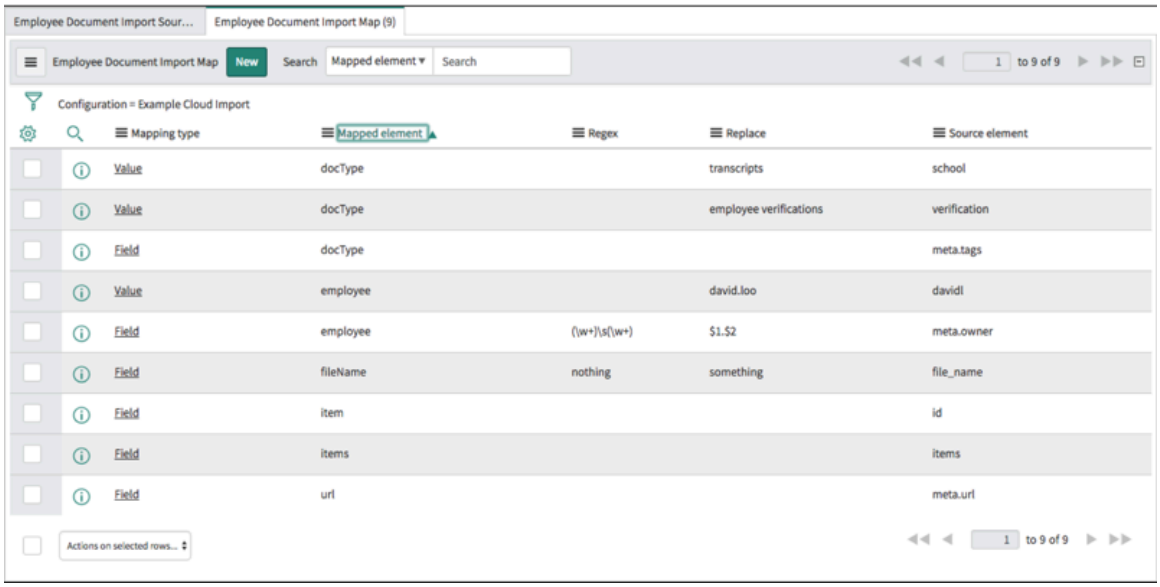

When a connection to your source repository is confirmed and import maps are set up correctly, you can click **Start staging job** from Related Links.

Correcting employee documents in the staging table

Use the Employee Document Staging form to correct staging records prior to importing to HR Service Delivery. Staging records are created after you have mapped your source employee documents and the Start staging job has run.

Before you begin

Role required: sn_hr_ef.admin, sn_hr_ef.document_import

Procedure

1. Navigate to **All** > **HR Administration** > **Bulk Import** > **Document Staging**.
   Or, from the Employee Document Import Configuration form, click the **Start staging job** related link.
   After the Employee Document Staging job runs successfully, you can review and correct any errors.
2. Click an employee name.
3. Click the **Validate** button.
   The Verify Fields pop-up appears.
4. Edit incorrect information.
5. Click **Complete**.
6. Click **Ready for Import**.
   You can also correct fields from the **Employee Document Staging** form.

Employee Document Staging

Fields	Description
Employee	Employee associated with the staged employee document.
Document Type	The document type you want associated with the employee document.

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Fields	Description
	Document types categorize your employee documents and determine access and retention. See Define policies for a document type.
File name	File name of the employee document.
State	The state of the employee document. ○ Ready: Document is ready to be captured and moved to Employee Document Management. ○ Draft: Document ignored when the Capture job is run and not moved to Employee Document Management.

7. Click the **Attachment Content** tab.

Attachment Content

Field	Description
Content source	The type of source document repository your employee documents are being pulled from. ○ URL: The source employee document repository is cloud-based. ○ Local: The source employee document repository is local.
Content	The path in the source repository that the staged document resides.

8. Click the Additional Information tab.

Additional Information

Fields	Description
Job	The name of the Employee Document Staging job. The job takes the document bulk import configuration name.
Configuration	The name of that identifies your employee document bulk import configuration. See Configuring employee document management bulk import with source document repository.
Description	Currently not used.
Domain	Automatically populated via domain separation and identifies the specific domain

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Fields	Description
	you are configuring employee documentation bulk uploads for. For more information on domain separation, see Domain Separation and HR Service Delivery.

9. Click **Validate** to ensure that the employee and document type are correct.
   You can change this information from the pop-up.
10. After making changes, click **Update**.
    The Employee Document Import Configuration form returns. You can continue reviewing and correcting Employee Document Staging records.
11. After reviewing and determining the staging records look correct, click the **Start capture job** related link to start the import process.

Employee Document Management dashboard

Gain insight into macro trends more efficiently on a single dashboard-style page showing you important metrics on employee documents, status of purging and purge settings, and legal holds.

Activating the Performance Analytics - Content Pack - Human Resources Employee Document Management Scoped App [com.sn_hr_employee_files_pa] plugin enables the Performance Analytics reports and dashboard for the Employee Document Management.

For more information on configuring your dashboard, see Dashboards overview.

The Employee Documents Dashboard has two tabs:

- Documents and Purging
- Legal holds

Documents

Provides totals for:

- Total Documents
- Documents Added in Last 30 Days
- Employees without Documents
- Unused Document Types

Also provides totals for:

Purging

Provides totals for:

- Pending Purge Authorization
- Purged Rejected
- Purge Date Not Calculated
- Purge Authorization Approver Group
- Purge Date Passed
- Purge Schedule for Next 6 Months

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Legal holds

Shows number of legal holds for:

- Employees
- Document Types
- Documents
- Documents on Legal hold

Note: You can also group and stack your data by different categories.

View Employee Document Management Dashboard

The Employee Document Management Dashboard provides a quick and easy way to view statistics about the purge and legal hold status of your employee documents.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Administration** > **Employee Documents** > **Dashboard**.
   The **Documents and Purging** tab shows by default.
2. The Click the **Legal Holds** tab to view the number of employees, document types, and documents on legal hold.

Reference - Employee Document Management

More information on other properties of Employee Document Management.

Properties for Employee Document Management application

Activating the Employee Document Management [com.sn_employee_document_management] plugin adds the following properties.

Properties control the behavior of the Employee Document Management application.

For optimal system performance and depending on your internal processes, employee documentation is purged based on the security policy established by your company.

Document management fields and descriptions

Field	Description
sn_hr_ef.enable_document_viewer (Enable "Document Viewer" to preview documents)	Enables document viewer to view documents of type (.docx, .txt, .png, .xls, and so on) directly from Employee Document Management. The default value is **Yes**. **Note:** If **No** is checked, you can still download the document and view it locally.
sn_hr_ef.enable_download_multiple (Enable "Download" UI Action to download multiple employee documents in a zip file.)	Lets you download multiple employee documents from Employee Documents list into a .zip file.

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Document management fields and descriptions (continued)

Field	Description
	The default value is **Yes**.
sn_hr_ef.max_file_size (Maximum file upload size in megabytes:)	The maximum file size of a document you can upload. The default is 30 megabytes. You can change this value, but system performance can be affected.
sn_hr_ef.purge_stride_length (The frequency in days that purge dates will be recalculated for Employee documents.)	Determines the stride value for recalculating the purge dates for employee documents. The stride value determines the range of values that can be assigned to every user [sys_user] record that has associated employee documents. For example, if 30 is entered, the range of values that can be randomly assigned is from 1 through 30. When the Refresh Purge Dates for Employee Documents scheduled job runs, based on the current date, it determines the stride value. Any user record assigned that stride value has their employee documents purge date recalculated. Also, purge dates are recalculated for employee documents that match the following requirements: • Employee document is active. • There are no legal holds or purge holds on the employee document. • The stride value for the user record matches the stride value for the current date. The number you enter determines the stride value range. For example, Entering a 1 indicates that there is no stride range and the purge recalculation is performed for all employee documents daily. Entering a larger number ensures that system performance is optimal since large companies can have large amounts of documents. The default value is **30** and can be modified.
sn_hr_ef.purge_authorization_interval (The number of days before the next month a purge notification is sent (value between 1-30):)	The number of days before the beginning of the month for the purge notification to be sent out.

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Document management fields and descriptions (continued)

Field	Description
	The Purge Notification Daily Job scheduled job uses this value to determine when to send a purge notification or authorization. The default value is **7** and can be changed.
sn_hr_ef.enable_purge_logs (Enable purge logs to log the files deleted during document purge.)	Indicates if you want a purge log to be created for deleted documents. A purge log lists all deleted documents with the fields you specify in the **These fields will be included in the purge logs if enabled** field. The default value is **Yes**. **Note:** The purge log is created after the Purge employee documents scheduled job runs. This job runs daily by default.
sn_hr_ef.purge_log_fields_to_include (These fields will be included in the purge logs if enabled.)	If you checked **Yes** for the **Enable purge logs to log the files deleted during document purge** field, enter the fields you want to appear in the purge logs. Separate the fields with a comma. Purge logs can be downloaded into a .csv file. The default values are: **employee, hr_case**. **Note:** The purge log is created after the Purge employee documents scheduled job runs. This job runs daily by default.

Components installed with Employee Document Management

Several types of components install with the activation of the Employee Document Management [com.sn_employee_document_management] plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Employee Document Management [com.sn_employee_document_management] plugin activates the sn_hr_ef.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Employee Document Management admin user by requiring a minimum number (default is two) of active users with this role.

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Document management roles and descriptions

Document management role details

Role title [name]	Description	Contains roles

EF admin
 	
[sn_hr_ef.admin]
	Has full control over the Employee Document Management application. Can:
	• Access Employee Document Management.
	• Assign Employee Document Management roles.
	• Search and read employee documents.
	• Create and update employee documents.
	• Manage administration of employee documents. Can create, read, and write to the following tables:
	  ○ Retention Period [sn_hr_ef_retention_period]
	  ○ Retention Policy [sn_hr_ef_retention_policy]
	  ○ Security Policy [sn_hr_ef_security_policy]
	  ○ Document Type [sn_hr_ef_document_type]
	• Manage legal holds on profiles and document types.
	Note: Contains the HR basic [sn_hr_core.basic] role that contains the HR profile writer [sn_hr_core.profile_writer] role.
	• Administer the Employee Documents Properties.
	• Configure and administer Employee Document Management Bulk Imports.
		• Employee Document Management Reader [sn_hr_ef.document_reader]
		• Employee Document Management Writer [sn_hr_ef.document_writer]
		• Employee Document Management Legal Hold Writer [sn_hr_ef.legal_hold_writer]
		• Employee Document Management Manager [sn_hr_ef.manager]
		• HR basic [sn_hr_core.basic]
		• sn_hr_ef.document_import

Employee Document Management Reader	Can:	None

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Document management role details (continued)

Role title [name]	Description	Contains roles
[sn_hr_ef.document_reader]	• Access Employee Document Management. • Search and read employee documents. **Note:** Add this role to the Read access tab on the security policy of the employee document. See Add or modify document security policies.	
Employee Document Management Writer [sn_hr_ef.document_writer]	Can: • Access Employee Document Management. • Search and read employee documents. • Create and update employee documents. **Note:** Add this role to the Write access tab on the security policy of the employee document. See Add or modify document security policies.	Employee Document Management Reader [sn_hr_ef.document_reader]
Employee Document Management Legal Hold Writer [sn_hr_ef.legal_hold_writer]	Can: • Access Legal Holds to view employee documents on legal hold. • Manage legal holds on HR profiles. **Note:** Requires the HR profile writer [sn_hr_core.profile_writer] role. HR profile writer can also create and search for employee documents. • Cannot manage legal holds on document types unless combined with the Employee Document Management Manager [sn_hr_ef.manager] role.	None

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Document management role details (continued)

Role title [name]	Description	Contains roles

Employee Document Management Manager
 	
[sn_hr_ef.manager]
	Can:
	• Access Employee Document Management.
	• Search and read employee documents.
	• Create and update employee documents.
	• Manage administration of employee documents. Can create, read, and write to the following tables:
	  ○ Retention Period [sn_hr_ef_retention_period]
	  ○ Retention Policy [sn_hr_ef_retention_policy]
	  ○ Security Policy [sn_hr_ef_security_policy]
	  ○ Document Type [sn_hr_ef_document_type]
	Note: All default security policies with the base system are part of the sn_hr_ef.manager role by default. Provides both read and write capabilities. No roles are automatically part of new security policies.
	• Add or remove legal holds on profiles and document types.
	Note: Requires the HR profile writer [sn_hr_core.profile_writer] role with the Employee File Management Legal Hold Writer [sn_hr_ef.legal_hold_writer] role to place HR profiles on legal hold.
		• Employee Document Management Reader [sn_hr_ef.document_reader]
		• Employee Document Management Writer [sn_hr_ef.document_writer]
		• Employee Document Management Legal Hold Writer [sn_hr_ef.legal_hold_writer]

Document Import [sn_hr_ef.document_import]	Grants access to the Employee Document Management Bulk Import Employee Document Staging [sn_hr_ef_import_staging] table and process flow.	None

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Document management scheduled jobs

Document management scheduled job details

Scheduled job	Description
Clean up inactive employee documents	Deletes uploaded but not submitted employee documents.
EF Bulk Import from Staging - Hourly	Processes up to 100 import staging records in the Ready state. It runs the capture step to upload the attachments and create an employee document. This job picks up 100 records per configuration. This job picks up the oldest configurations first regardless of the number of associated staging records. For example: • Configuration A has only one staging record created on 11/01/2018 at 8:00 AM. • Configuration B has 99 staging records created on 11/01/2018 at 8:05 AM. • Configuration A runs first and Configuration B runs in an hour.
Purge employee documents	This job purges employee documents flagged as eligible for purging.
Purge Notification Daily Job	Determines what documents require notification or authorization to purge based on security policy. This job sends an email with a link to the list of documents to all members of the group assigned.
Refresh Purge Dates for Employee Documents	This job ensures that any employee documents that have a changed retention period since the last run does not purge a document. This scheduled job works with the sn_hr_ef.purge_stride_length property to determine which employee documents for a user [sys_user] record get purge dates recalculated.

Note: The Employee Document Management scheduled jobs run daily by default. To change when a scheduled job runs, see Default schedules.

Document management tables and descriptions

Document management table types

Table	Description
Attachment Tracking [sn_hr_ef_attachment_tracking]	Tracks copied attachments for purging. Also used to for attachments that get copied to an HR case from an HR task.
Document Type [sn_hr_ef_document_type]	Records about employee document categorization, access, retention policy, and legal holds.
Employee Document [sn_hr_ef_employee_document]	Records about an employee document, document type, purge hold, purge date, employee, tags, size, format, creation date, and created by.

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Document management table types (continued)

Table	Description
Employee Document Staging sn_hr_ef_import_staging	Contains information on employee documents from your source repository. This information maps to elements required for import to Employee Document Management.
Legal Hold [sn_hr_ef_legal_hold]	Records about legal hold placed on either a document type or HR profile.
Purge Log [sn_hr_ef_purge_log]	Configurable by the Employee Documents Properties. Determines what fields appear on the purge logs.
Retention Period [sn_hr_ef_retention_period]	Records about retention periods including date offset type, units, and quantity.
Retention Policy [sn_hr_ef_retention_policy]	Records about retention policies including conditions the policy applies to, retention period, and created by.
Security Policy [sn_hr_ef_security_policy]	Records about security policies including COE, purge authorization, groups, roles, and created by.
Document Type Security Policy [sn_hr_ef_m2m_doc_type_sec_policy]	Associates security policies to a document type.

Document Templates

With the ServiceNow® Document Templates application, you can create HTML and PDF document templates to generate standard letters or documents. You can automate and simplify the process of filling, signing, and reviewing a document online.

Enable multiple participants to collaboratively work on a single document

- Configure a document template.
- Create specific tasks for specific participants such as sign, fill, or review.
- Auto initiate tasks based on the order defined for the participants.
- Notify participants about their assigned document tasks.
- Preview the document at any stage during the information input process. Understand at what stage and with which participant is the action pending.

Generate a PDF document

- Configure a document template.
- Preview a document template and generate a PDF document from it.

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Get started

Configure	Use
 Plan and configure your implementation	 Automate and simplify the process of filling, signing, and reviewing a document online
Reference	
 Get details about components like fields, tables, and properties	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Configuring Document Templates

Set up Document Templates to automate and simplify the process of filling, reviewing and signing a document online.

Application activation

You can activate the Document Templates application from ServiceNow Store.

Note: PDF document template and HTML document template are available with the Document Templates application. For Word document Template, Contract Management Pro (paid) or Legal Service Delivery (paid) license is required.

- To configure and use a PDF document template, see Document Templates of type PDF (Advanced forms).
- To configure and use an HTML document template, see Document Templates of type HTML.

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Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Document template categories

Document template categories help you to categorize similar documents together. It makes finding the correct document template easier.

For example, you can have multiple employee verification letters depending on if the employee is full-time, part time, or contingent. You can create a document category and have those document templates stored in that category.

You can create a document category by navigating to **Document Templates** > **Document Template Categories**. After creating a document template category, you can add document templates to that category.

Important: Document categories and document templates appear based on your user criteria.

Document Templates of type HTML

An HTML document template uses variables to pre-fill information from tables into the document. You can create how the document looks by defining the header, footer, images, placement of footer, and the text within the template. Using the HTML document template, you can collect e-signatures from multiple participants and generate a PDF document online.

Before you begin generating documents, configure the templates with your company logo and text. Obtain the following items and information to create or configure HTML templates.

- A page of your company letterhead.
- Copies of your current company employment verification letter and offer letter templates, if available.
- The logo image to use in your header.
- The logo image to use in your footer.

The following flow describes how you can use an HTML document template from configuring the template until signing and generating a PDF document online.

- Configure an HTML document template.
- Create participants for an HTML document template.
- Insert signatures.
- Publish the HTML document template.
- Document tasks generation.

Note: You can also edit the body of the HTML template and generate a PDF copy before initiating document tasks.

Configure an HTML document template

Create or modify the document template with your unique company logo and audience criteria.

Before you begin

Role required: sn_hr_core.admin and Delegated developer

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About this task

https://player.vimeo.com/video/1126976821?h=9ddb4d5756&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Select **New**.
3. Select **HTML Document Template**.
4. On the form, fill in the fields.

HTML Template form

Field	Description
Name	Name of the document template.
Table	Table associated with the type of template. The table determines the available variables that can be used. **Note:** Tables appear based on the application scope that is selected.
Category	Document category in which the template is added.
User criteria	Audience criteria for this document. For example, you can create a letter intended for only Canadian employees. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Body	Text in the template. To insert variables, place your cursor in the desired location and select the variable. Available variables are listed under **Fields**. Document template styles are applied to regular text fields, and not for rich description fields. A rich description field preserves its own HTML formatting and style and is not overridden by the document template formatting and style. Use the formatting tools in the **Body** to apply formatting options, such as bold, italic, underline, font styling. The body is a place holder for HTML text and tokenized variables. **Note:** ○ Jelly and CSS Styling are not supported. ○ You can also use Document template scripts to dynamically change the text in the HTML body.
Start date	Date starting which the HTML document template is valid. **Start date** helps in maintaining multiple versions of same template.

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Field	Description
	Note: Start date must be before the end date.
End date	Date until which the HTML document template is valid. **End date** helps in maintaining multiple versions of same template. By default, if the values in **Start date** and **End date** are empty it will imply that the template will always be valid. If you specify an end date, you must also specify a start date.
Template date format	Format in which you want the date to appear when an agent previews the document, generates the attachment, or initiates document tasks for participants. **Note:** ○ When signing using a ServiceNow application or the AdobeSign application: If no value is selected in **Template date format**, the value specified in the **template_date_format** system property is considered. If both **Template date format** and **template_date_format** system property are empty, the value in the Date format field from the agent's user profile is considered. ○ When signing using a DocuSign application: The date format selected in Signing settings in the DocuSign application is considered over **Template date format** in the configured HTML template in a ServiceNow instance.
Template language	Language in which you want dynamic tokens to be translated when an agent previews the document, generates the attachment, or initiates document tasks for participants. The **Template language** field is also used for full template translation. **Note:** ○ Template language is a mandatory field. The default language is none. ○ Translation feature is available only when language plugins are installed on the instance.
Select variables	List of variables that can be used in the body of the template. Variables pull information from the selected table to customize the template. Offsets are supported for date variables. Offsets extend or subtract days, weeks, or months from a date used in a template. Valid date offset variables are: ○ + (plus) ○ - (minus)

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Field	Description
	○ d (days) ○ w (weeks) ○ m (months) Examples: ○ Offer letter (five days after the stated date): Your offer is valid until ${Date +5d}. ○ Benefits for terminated employee (two weeks from termination date): Your benefits end effective ${subject_person.hr_profile.employment_end_date +2w}. **Note:** Only variables that you have access appear.
Signing type	Option to specify the application that is used for signing the document. For example, ServiceNow Sign, DocuSign or AdobeSign. **Note:** Signing types are available only when the respective integration plugins are installed.
Header	
Header image	Image to be displayed in the header. You can add your company logo using this feature. **Note:** Supported file types are: JPEG, JPEG2000, GIF, PNG, BMP, WMF, TIFF, and JBIG2.
Header image position	Position where you want the header image to appear : left, right, or center.
Header image height	Height of the image in the header. **Important:** ○ The height and width of the image is scaled proportionally based on the value that you specify. ○ Ensure that the height of the image is lesser than the value specified in the **Page size** field, otherwise, the image is cropped.
Footer	
Footer image	Image to be displayed in the footer. **Note:** Supported file types are: JPEG, JPEG2000, GIF, PNG, BMP, WMF, TIFF, and JBIG2.
Footer image height	Height of the image in the footer.

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Field	Description
	Important: ○ The height and width of the image is scaled proportionally based on the value that you specify. ○ Ensure that the height of the image is lesser than the value specified in the **Page size** field, else, the image is cropped.
Footer image position	Position where you want the footer image to appear: left, right, or center.
Footer text	Text to be displayed in the footer. For example, you can add proprietary and confidential statements.
Footer text position	Position where you want the footer image to appear: left, right, or center.
Vertical alignment	Vertical alignment of the footer text with the footer image.
Page	
Page size	Size of the page that can be selected from the list such as Letter, A4, or Legal.
Custom font	Custom font from the PDF Generation Font Families table. **Important:** Make sure that you use the custom font family in the CSS of the HTML body.
Top/Bottom margin	Space from the top of the page until the starting of the HTML content or space from the bottom of the page until the ending of the HTML content.
Left/Right margin	Space from the left of the page until the starting of the HTML content or space from the right of the page until the ending of HTML content.

5. Place the mouse in the desired location in the body of the template and select the **Insert Date** button to insert date variables.
   You can use the button multiple times to add different types of dates based on the variables you choose.
6. Select **Add blocks**.
   a. To add an existing document block to the template, in Search blocks, type in the name of an existing document block, select the document block, and select **Insert**.
   b. To add a new document block to the template, click **Create New Block**. For more information, see Create document blocks in Document Templates.
7. To automatically generate Table of Contents (TOC) and page numbers in the document that is generated from an HTML template, perform the following steps:
   a. In the **Table of Contents** field, select the TOC configuration that you want to apply on the HTML template.
   b. In the **Page number** field, select the page number configuration that you want to apply on the HTML template.

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c. Select **Insert Table of Contents** and insert the Table of Contents macro in the required position in the body of the HTML template.

Note: The Table of Contents macro will not be displayed if the TOC configuration is not selected in the **Table of Contents** field.

8. To translate content in templates using Localization Framework, select **Translate**. For more information, see Use Localization Framework for Document Templates.
9. To save your document and remain on the **HTML Document Template** form, click **Save**.
10. To save and return to the All Document Templates list, select **Submit**.

Create participants for an HTML document template

Define actions and the order of actions for participants. The type of action and order are considered while initiating document tasks.

Before you begin

- Role required: sn_hr_core.admin
- This content applies only to the document templates that are created in the Document Templates application (sn_doc). Document Templates is different from HR Document Templates. For HR Document Templates, refer to .

About this task

https://player.vimeo.com/video/1127368414?h=04530ebca6&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Document Template** > **All Document Templates**.
2. Select the HTML template you want to use.
3. Configure the required template and click **Submit**.
4. In the **Participants** related list, click **New**.
5. On the form, fill in the fields:

Participant form

Field	Description
Name	Display name of the mapped participant.
Action	Type of action performed by the participant: Sign **Note:** In addition, the participant can choose to decline signing the document. The option to decline signing appears only when the **Signing Type** is **ServiceNow**. For more information, see Sign an HTML document.
User	Mapping user field to a participant.

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Field	Description
	Note: ○ When you select a value, the participant is considered to be an internal user. If Participant Name and Participant Email fields (optional for internal user) are filled along with User field, the electronic signature task will be sent to Participant Name and Participant Email, not the Name and Email from the User field. When you do not select a value in the User field, the participant will be considered an external user (Participant who does not have access to ServiceNow system). For such participants, Participant Name, Participant Email are to be specified. ○ The value in the User field is cleared when you save or update the template with the Advanced script field selected.
Participant name	Option to specify the name when the defined participant is an external user. **Note:** ○ When you select a value in User field, the Participant name field will be an optional field. When you do not select a value in User field, the Participant name field will be a mandatory field. ○ The value in the Participant name field is cleared when you save or update the template with the Advanced script field selected. ○ This field is available only when signing type is AdobeSign or DocuSign.
Participant email	Option to specify an email address when the defined participant is an external user. **Note:** ○ When you select a value in the User field, the Participant email field will be an optional field. When you do not select a value in User field, Participant email field will be a mandatory field. ○ The value in the Participant email field is cleared when you save or update the template with the Advanced script field selected. ○ This field is available only when signing type is AdobeSign or DocuSign.
Table	Table (sys_user table or any table extending sys_user table) from which you are choosing to populate the variables.
Document template	Name of the document template.
Document task template	Template selected on the Document Template task table to populate additional details for the document task, such as description and short description for sign tasks. **Note:** If additional details are not defined, the default values of the template are used in the document template task.

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Field	Description
Advanced script	Option to display the Script field.
Script	Script indicating the participant conditions with User ID, Participant name and Participant email. This field is enabled only when the Advanced script field is selected.
Optional	When enabled, a participant will be skipped if the participant name and email is not available. This check is done during runtime only and not while configuring the template.
Signature height	Option to indicate the height of signature.
Signature width	Option to indicate the width of signature.

6. Click **Submit**.

Insert signatures

Insert signatures in an HTML document template by selecting participants from the list.

Before you begin
Role required: sn_hr_core.admin

Procedure

1. Configure an HTML document template.
2. Create participants for an HTML document template.
3. Place the cursor in the desired location in the **Body** field.
4. Select **Insert Signature** to insert signature variable for a participant.
5. In the Add a signature window, select a participant.

   Note: Signing date is not supported.

6. Click **OK**.

Variables supported in HTML document templates

Include customized variables in a document template in addition to the variables that are available in the **Select Variables** field in the HTML document template configuration page.

Supported Variables

The following variables are supported in an HTML document template:

- Date
- Date/Time
- Duration
- Email
- HTML
- IP Address

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- List Collector
- Lookup Multiple Choice
- Lookup Select Box
- Multi Line Text
- Multiple Choice
- Numeric Scale
- Reference
- Select Box
- Single Line Text
- URL
- Wide Single Line Text
- Yes / No
- CheckBox
- Requested For

Unsupported Variables

The following variables are unsupported in an HTML document template:

- Attachment
- Break
- Container End
- Container Split
- Container Start
- Custom
- Custom with Label
- UI Page
- Label
- Rich Text Label
- Masked
- Multi Row Variable Set

Add customized variables in a document template

Customize variables at a record producer level, and call out those variables in the HTML document template that you are configuring.

Before you begin

Role required: admin

Procedure

1. Open a record producer and fill in the required fields.
   Add the variables that you want to use in the **Variables** list.

2. Open an HTML document template that has the same table selected as the record producer.

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Call out the customized variables in the HTML template body by typing in the variable in this format, for example, $ {variables.start_date).

Note: start_date refers to the exact **Name** of the variable in the **Variables** list in the record producer.

1 refers to variables from the table selected in the HTML document template.

2 refers to customized variables from the variable list in the record producer.

Document template scripts

With document template scripts, you can dynamically change the text in the body of the HTML template. Document template scripts allow you to perform simple tasks, such as displaying HR data, and complex ones, such as making advanced database queries.

You can add a `${template_script:script name}` embedded script tag to the body of the HTML template, replacing script name with the name of the script you created. This makes it easy to use the same scripts in multiple document templates. You can create a script by navigating to**Document Templates** > **Document Templates Script**.

Example of how to create and use a document template script in an HTML template

1. The employee_emergency_contacts script populates the emergency contacts list in an Employee Profile document.

```
(function runTemplateScript(target /*GlideRecord for target
 task*/ ) {
 var getHeaderCell = function(label) {
  return '<th style="border: 1px solid #dddddd; text-align:
 left; padding: 8px;">' + label + '</th>';
 };
 var getDataCell = function(value) {
  return '<td style="border: 1px solid #dddddd; text-align:
 left; padding: 8px;">' + value + '</td>';
 };

 var html = '';
 var hrTaskGr = new GlideRecord('sn_hr_core_contact');
 hrTaskGr.addQuery('user', target.getValue('subject_person'));
 hrTaskGr.query();
 while(hrTaskGr.next()) {
  html = html + '<tr>';
  html = html + getDataCell(hrTaskGr.getDisplayValue('name'));
  html = html +
 getDataCell(hrTaskGr.getDisplayValue('mobile_phone'));
  html = html +
 getDataCell(hrTaskGr.getDisplayValue('relation_to_employee'));
  html = html + '</tr>';
 }

 if(!gs.nil(html))
  html = '<h4>Emergency Contact Information</h4><table
 width="500px;"><tr>' + getHeaderCell('Name') +
```

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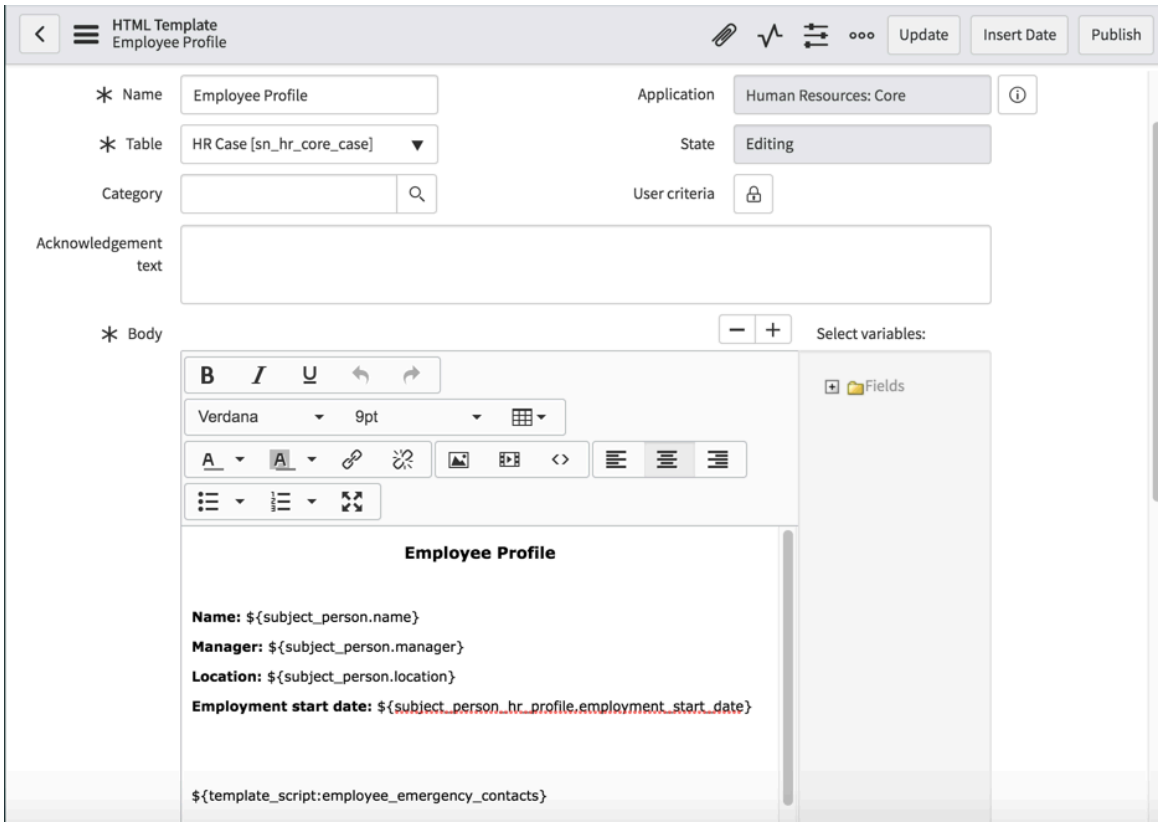
```
 getHeaderCell('Mobile phone') + getHeaderCell('Relationship')
 + html + '</table>';

 return html;
})(target);
```

2. The employee_emergency_contacts script is called in an HTML document template by typing **${template_script:employee_emergency_contacts}** in the body of the Employee Profile HTML document template.



3. The Employee Profile HTML document template is selected on a case and the document template is generated with emergency contacts list as follows:

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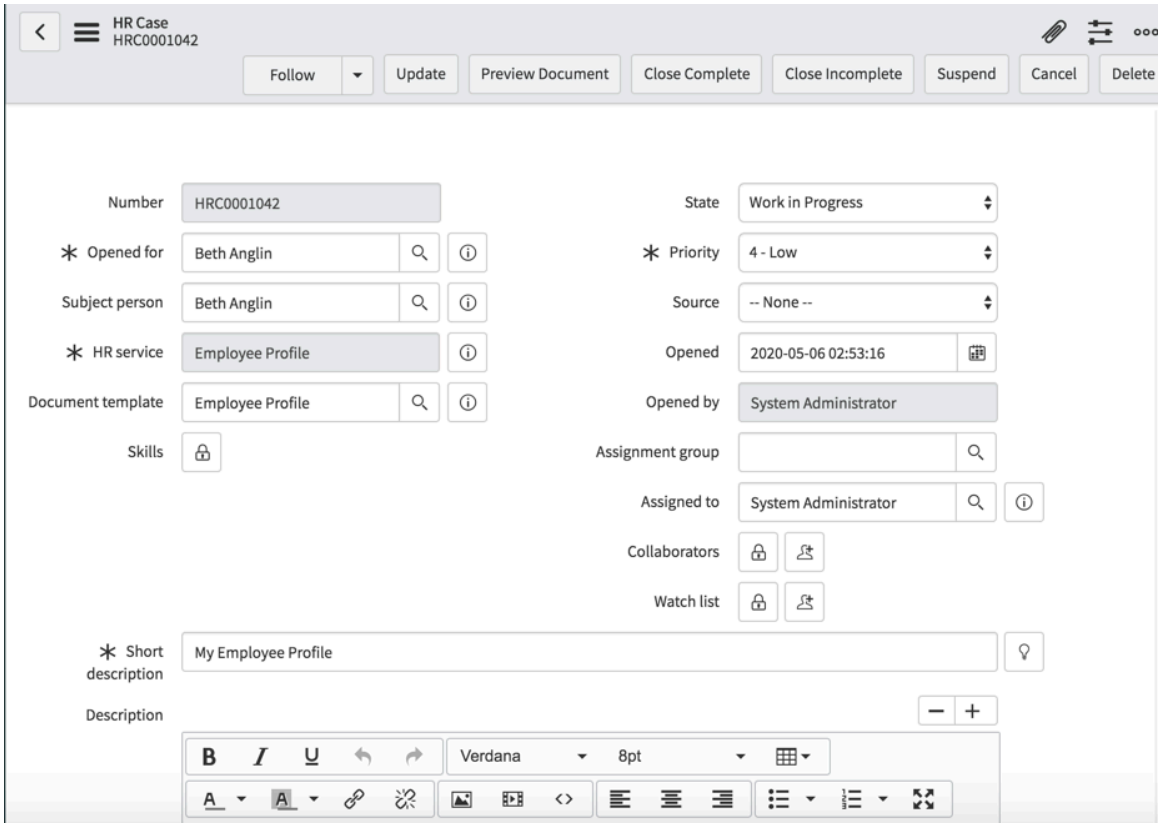

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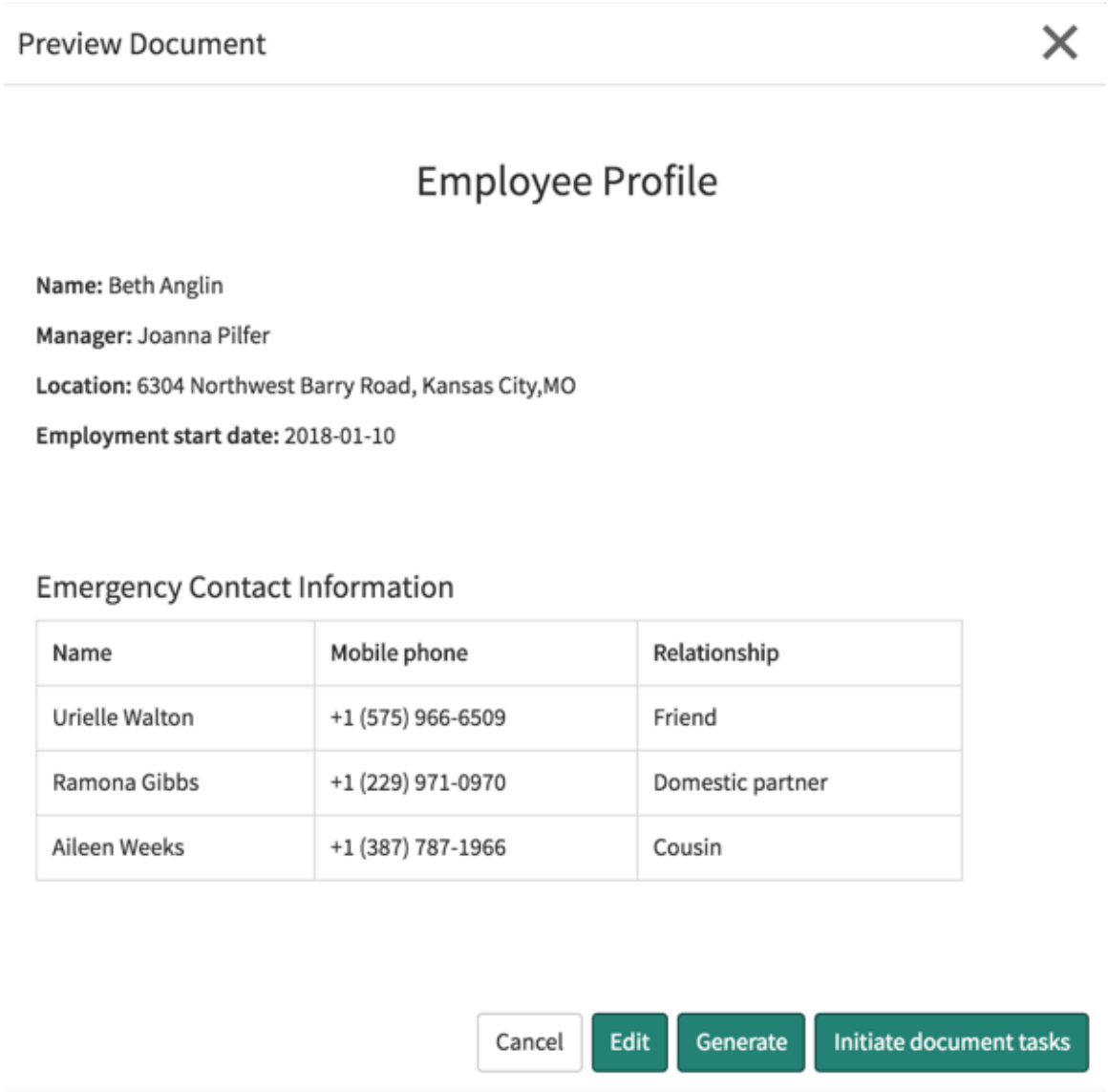

Example of how document template script translates text in an HTML template

Following is an employee_emergency_contacts script that populates the emergency contacts list in an Employee Profile document.

`docTemplate` in this script references to the document template record, which helps in identifying the language and date format that are selected on the document template. `getDisplayValueLang` is an API that helps in changing the language of dynamic tokens to the display language set in the **Template language** field in a document template. `getByFormat` is an API that helps in displaying the date in the format set in the **Template date format** field in a document template.

```
(function runTemplateScript(target /*GlideRecord for target
 task*/, docTemplate /*GlideRecord for doc template*/) {

    //Add your code here to return the dynamic content for
 template
    var getHeaderCell = function(label) {
        return '<th style="border: 1px solid #dddddd;
 text-align: left; padding: 8px;">' + label + '</th>';
```

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```
    };
    var getDataCell = function(value) {
        return '<td style="border: 1px solid #dddddd;
 text-align: left; padding: 8px;">' + value + '</td>';
    };

    var html = '';
    var templateLang = docTemplate.getValue('language');
    var templateDateFormat =
 docTemplate.getValue('template_date_format');
    var hrTaskGr = new GlideRecord('sn_hr_core_contact');
    hrTaskGr.addQuery('user',
 target.getValue('subject_person'));
    hrTaskGr.query();
    while(hrTaskGr.next()) {
        var dob = hrTaskGr.getDisplayValue('date_of_birth');
        var grDOB = new GlideDateTime(dob);
        html = html + '<tr>';
        html = html +
 getDataCell(hrTaskGr.getDisplayValue('name'));
        html = html +
 getDataCell(hrTaskGr.getDisplayValue('mobile_phone'));
        html = html +
 getDataCell(hrTaskGr.getElement('relation_to_employee').getDisp
layValueLang(templateLang));
        html = html +
 getDataCell(hrTaskGr.getElement('priority').getDisplayValueLang
(templateLang));
        html = html +
 getDataCell(grDOB.getLocalDate().getByFormat(templateDateForm
at)
        );
        html = html + '</tr>';
    }

    if(!gs.nil(html))
        html = '<h4>Emergency Contact Information</h4><table
 width="500px;"><tr>' + getHeaderCell('Name') +
 getHeaderCell('Mobile phone') + getHeaderCell('Relationship')
 + getHeaderCell('Priority') + getHeaderCell('Date of birth') +
 html + '</table>';

    return html;

})(target, docTemplate);
```

Following is an example of how dynamic tokens are translated in an HTML doc template.

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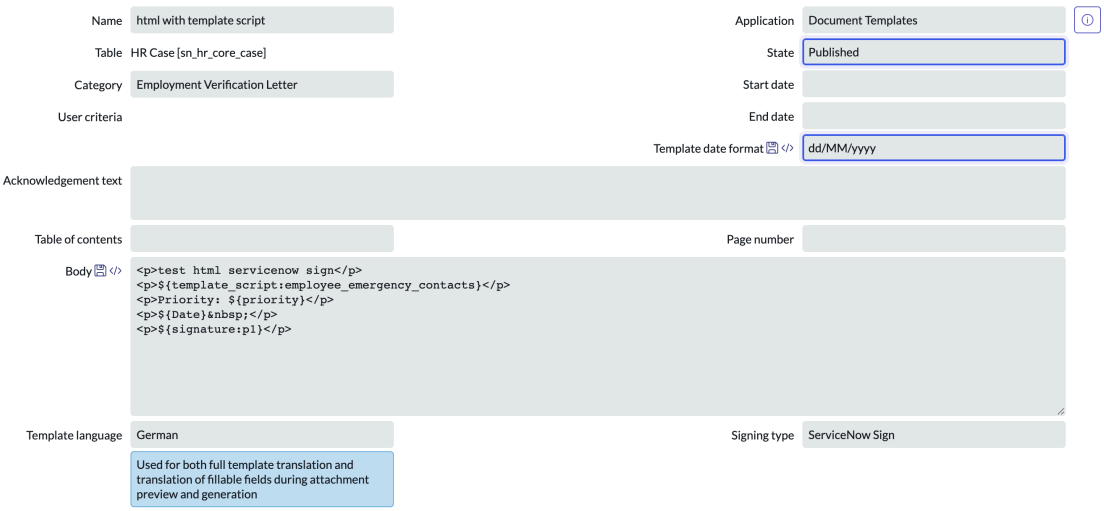
1. While configuring an HTML template, the template language is selected as German and date format is set to dd/MM/yyyy.



2. The HTML document template is referenced in an HR case.
3. When the agent previews the document, generates the attachment, or initiates document tasks for participants, priority and relationship fields are translated into the German language, and dates appear in the dd/MM/yyyy format.

Emergency Contact Information

Name	Mobile phone	Relationship	Priority	Date of birth
Dillon Booth	+1 (930) 242-8957	Nichte	Primär	16/11/1997
Hope Boyle	+1 (596) 999-0916	Neffe	Alternative	05/02/1989
Byron Greer	+1 (841) 172-8171	Neffe	Alternative	04/09/2000

Priority: 4 – Niedrig

12/10/2023

${signature:p1}

Document blocks in Document Templates

Replace blocks of text in a document based on certain rules so that you do not have to create multiple template versions of the same document.

Key features include:

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- Create document blocks that you can use in multiple HTML templates. Each document template block can have multiple block contents. Each block content can be mapped to a condition. The first block content that matches the condition will be considered.

  Assume that there is a clause in a verification letter that is intended for employees of a particular geography or of a particular type. In this case, you can write a condition based on parameters such as employee location or employee type. Then, associate the condition to a content that must appear conditionally in the document that is being generated.

- Translate document templates and document block content by installing Localization Framework and language plugins that you require.

Create document blocks in Document Templates

Create document blocks that you can use in multiple HTML templates.

Before you begin

Role required: sn_doc.admin

Procedure

1. Navigate to **All** > **Document Templates** > **Document Template Blocks**.
2. Click **New**.
3. On the form, fill in the fields:

Document Templates Block form

Field	Description
Name	Suitable name for the document block.
Table	Table to which you want to associate the document block.
Topic detail	Used to categorize template blocks according to the service for which they are applicable. Each topic category can have one or more topic details and each topic detail can have one or more HR services.
Topic category	Used to categorize template blocks according to the service for which they are applicable. Each topic category can have one or more topic details and each topic detail can have one or more HR services.
Active	Option to make the document block available for use.
Description	More information about the document template block.

4. Click **Submit**.

What to do next

1. Add content to the document template block. For more information, see Create block content in Document Templates.
2. View the HTML document templates which contain the document blocks.

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Create block content in Document Templates

Each document template block can have multiple block contents. Each content mapping to a condition.

Before you begin

Role required: sn_doc.admin

Procedure

1. Navigate to **All** > **Document Templates** > **Document Template Blocks**.
2. Select a document template block.
3. In the **Document Templates Block Contents** related list, click **New**.
4. On the form, fill in the fields:

Document Template Block Contents form

Field	Description
Name	Suitable name for the block content.
Block	Name of the document template block to which you want to associate the document block content.
Order	Order in which the conditions are matched. The first block content that matches the condition is considered.
Active	Option to indicate that the block content is available to use.
Applies when	Conditions are applied on the selected table on document template block.
Applies to	User criteria to which the block content is applicable.
Applies to user	User to whom the selected user criteria is applicable. **Note:** If no value is selected in the **Applies when** and **Applies to** fields, then the block content will be applicable for the HTML template irrespective of the user and selected table.
Body	Text that you want to include in the block content.

5. Click **Submit**.

Use Localization Framework for Document Templates

Translate content in Document Templates and document blocks Localization Framework.

Before you begin

- Role required: sn_doc.admin
- Install the Localization Framework Installer plugin (com.glide.localization_framework.installer).
- Configure Localization Framework with the required artifacts. See Artifact Configurations for more information.

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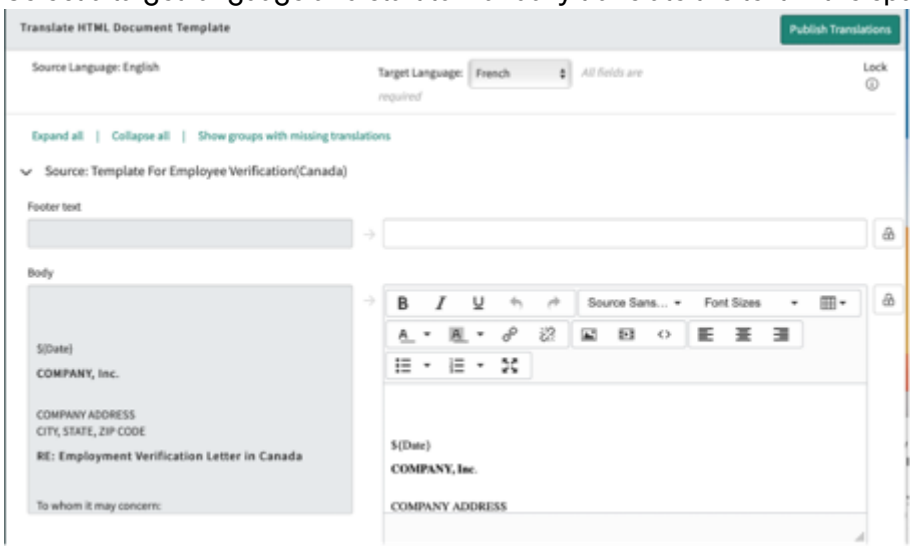
- Activate the required languages and configure them with Localization Framework. For more information, see Activate a language.
- If you want to use machine translators, activate the Dynamic Translation plugin (com.glide.dynamic_translation). Configure the Dynamic Translation framework for the translation service provider. For more information, see Dynamic Translation.

Procedure

1. Select a document template or a document block.
2. Click **Translate**.

   Note: If the Dynamic Translation application is installed, the **Machine Translate** button appears. The configured machine translator converts only the content (in the document template or document block) to the required language, but not the token values.

3. Select a target language and start to manually translate the text in the space given.



4. Click **Publish Translations**.
   A copy of the source template is created and moved to Draft state.

Document Templates of type PDF (Advanced forms)

A PDF document template originates from a fillable PDF or a standard PDF with inline signatures. Using the PDF document template, you can collect details and e-signatures from multiple participants, review, and generate a filled PDF document.

Important:

You can create a PDF document template either:

- uploading a fillable, editable PDF document into the form.
- using a PDF from Managed Documents.

The following flow describes how you can use a PDF document template from configuring the template until filling, signing, reviewing, and generating a PDF document.

- Configure a PDF document template.
- Create participants for a PDF document template.
- Define a PDF field mapping.

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- Mark a signature block.
- Publish the PDF document template.
- Document tasks generation.

Configure a PDF document template

Upload an editable, fillable PDF template and customize the template as per your business needs.

Before you begin

Role required: sn_hr_core.admin and Delegated developer

Note:

- For legally binding e-signatures and digital signatures use the following signing types: DocuSign, AdobeSign, Digital Signature - Smart Cards.
- Update sets do not support large attachments. If your template includes large documents, manually export the PDF template record XML from the source instance and import it into the target instance.

About this task

https://player.vimeo.com/video/1126964489?h=bf2756042f&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Click **New**.
3. Select **PDF Document Template**.
4. On the form, fill in the fields:

PDF Template form

Field	Description
Name	Name of the PDF document template.
Table	Tables appear based on the application scope selected.
Category	Document category in which the template is added.
Application	Scope of the application in which the document template is created.
State	Current state of the document template. ○ **Draft**: Indicates that the document template is not yet published. ○ **Editing**: Indicates that the document template is being edited after it has been published. ○ **Published**: Indicates that the document template can be consumed by services and cases.
Active	Option for enabling the PDF document template for use.

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Field	Description
User criteria	Audience criteria for this document. For example, you can create a letter intended for only Canadian employees. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Signing type	Option to specify the application that is used for signing the document. For example, ServiceNow Sign, DocuSign, AdobeSign, Digital Signature - Smart Cards. **Note:** Signing Types are available only when respective integration plugins are installed.
Document storage destination	Option to specify the location where the signed document is stored. **Note:** This option appears only when **Digital Signature - Smart Cards** is selected as Signing Type.
Owner	Option to specify the owner of the document storage destination. **Note:** This option appears only when **Digital Signature - Smart Cards** is selected as Signing Type.
Attachment type	Option to upload a new document or select a document from ServiceNow Managed Documents.
Document revision	Option to select a document from ServiceNow Managed Documents. **Note:** This field appears when **Select from document revision** is selected in **Attachment type**.
Document	Option to upload the attachment of a fillable PDF for further customization. **Note:** This field appears when **Upload new document** is selected in **Attachment type**.
Start date	Date starting which the PDF document template is valid. **Start date** helps in maintaining multiple versions of same template. **Note:** Start date must be before the end date.
End date	Date until which the PDF document template is valid. **End date** helps in maintaining multiple versions of same template. By default, if values in **Start date** and **End date** are blank it will imply that the template will always be valid.

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Field	Description
	If you specify an end date, you must also specify a start date.
Template date format	Format in which you want the date to appear when an agent previews the document, or generates the attachment, or initiates document tasks for participants. **Note:** ○ When signing using a ServiceNow application or the AdobeSign application: If no value is selected in **Template date format**, the value specified in the **template_date_format** system property is considered. If both **Template date format** and **template_date_format** system property are empty, the value in the Date format field from agent's user profile is considered. ○ When signing using the DocuSign application: The date format selected in Signing settings in the DocuSign application is considered over **Template date format** in the configured PDF template in a ServiceNow instance.
Template language	Language in which dynamic tokens are translated when an agent previews the document, or generates the attachment, or initiates document tasks for participants. **Note:** ○ Template language is a mandatory field. The default language is none. ○ Translation feature is available only when the language plugins are installed on the instance.
Acknowledgment text	Text that prompts the user to select a check box when submitting a filled document.
Source template	Source template from which you created a copy of current template.

5. Click **Submit** or **Save**.

What to do next

- Click the **Parse PDF** related link to automatically parse information on the PDF and store that information in the PDF Mapping table for reuse.
- In the **Participants** related list, create participants.
- In the **PDF Template Mappings** related list, define field mappings.
- Click Mark a signature block.
- Publish the template. Flows using the template might get effected in case you want to edit a published template.

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Define a PDF field mapping

Define editable fields and store signature mappings using the PDF field mappings section.

Before you begin

Role required: sn_hr_core.admin

About this task

Information on the PDF is parsed and stored in the PDF Mapping table. **Parse PDF** will allow you to store the fillable fields and **Mark signatures** will allow you to add signature mappings.

Procedure

1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Select **PDF Document Template**.
3. Configure the PDF template.
4. Click the **Parse PDF** related link.

Note: The link appears only for an editable PDF.

The PDF Mapping related list displays field mappings.

PDF Template Mapping

Field	Description
Field name	Display name that represents the document field.
PDF template	PDF template to which the mapping record belongs.
Document field	Field from the fillable PDF document that is automatically created through the **Parse PDF** related link. **Important:** Editing Document field is not allowed as it might break the document template flow.
Document field type	Type of field you are mapping, such as Signature or Checkbox.
Preview value	Field-mapping value for preview. **Note:** Use this field to test a field value without going through the process of mapping fields or creating a case to test your mappings. What you enter here appears while you preview the document.
Advanced script	Use to configure script fields for complex mapping of a field. For example, to map a Social Security Number from the HR Profile [sn_hr_core_profile] table to a document and format it correctly, a script is used.
Mandatory	Mandatory field to be filled by the assigned participant. **Note:** This field is not applicable for document field of type checkbox.

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Field	Description
Mapping table	Table that the mapped fields come from.
Read only	Option for enabling the editing of the field by the selected participant.
Mapping field	Field that maps information into your document.
Participant	Participant who can edit the field in the document.
Page number	Page number of the PDF document which contains the field. Page number where the field is present.
Format	Format in which values are to be entered by the participant. If the participant does not enter value in the specified format, a validation error appears for the participant.
Active	Option for activating the field mapping.
Use Signing date	Option to record the signature date automatically in the specified field in PDF document. **Note:** This option is applicable to ServiceNow Sign only.
Date offset type	Indicates if the date should be Before, On, or After the specified date. **Note:** This field appears only for a date field when the **Advanced script** option is deselected.
Date offset quantity	Measuring units for the offset such as days, weeks, or months. **Note:** This field appears only for a date field mapping when the **Advanced script** option is deselected. It appears only when the **Before** or **After** values are selected in the **Date offset type** field.
Date offset units	Number of units to offset. **Note:** This field appears only for a date field mapping when the **Advanced script** option is deselected. It appears only when the **Before** or **After** values are selected in the **Date offset type** field.
Select date format	Format for the date field. Values are: ○ User date format: Indicates that the date format is picked from the participant's user preference. ○ Specific format: Indicates the format in which you want the participant to enter the date.
Specific date format	Specific format in which you want the participant to enter the date.
States	Options stored for the non text fields. For example, social status might includes options such as **Married** or **Single**.

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Create participants for a PDF document template

Define actions and the order of actions for participants. The type of action and order are considered while initiating document tasks.

Before you begin

- Role required: sn_hr_core.admin
- You need to define participants only when you want to use the document template flow. If you only want to generate a PDF document, defining participants is not mandatory.
- This content applies only to the document templates that are created in the Document Templates application (sn_doc). Document Templates is different from HR Document Templates. For HR Document Templates, refer to .

About this task

https://player.vimeo.com/video/1127367650?h=91f643e76d&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **Document Template** > **All Document Templates**.
2. Select the template you want to use.
3. Configure the required template and click **Submit**.
4. In the **Participants** related list, click **New**.
5. On the form, fill in the fields:

Participant form

Field	Description
Name	Display name of the mapped participant.
Action	Type of action to be performed by the participant such as **Fill**, **Sign**, or **Review**. **Important:** In case of ServiceNow signing, **Fill** and **Review** actions are available for a PDF template. In case of external signing, **Sign** action is available for PDF document template.
Order	Order in which a task has to be initiated for the participant to complete the action.
User	Mapping user field to a participant.

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Field	Description
	Note: ○ When you select a value, the participant is considered to be an internal user. If Participant Name and Participant Email fields (optional for internal user) are filled along with User field, the electronic signature task will be sent to Participant Name and Participant Email, not the Name and Email from the User field. When you do not select a value in the User field, the participant will be considered an external user (Participant who does not have access to ServiceNow system). For such participants, Participant Name, Participant Email are to be specified. ○ The value in the User field is cleared when you save or update the template with the Advanced script field selected.
Participant name	Option to specify the name when the defined participant is an external user. **Note:** ○ When you select a value in User field, the Participant name field will be an optional field. When you do not select a value in User field, the Participant name field will be a mandatory field. ○ The value in the Participant name field is cleared when you save or update the template with the Advanced script field selected. ○ This field is available only when signing type is AdobeSign or DocuSign.
Participant email	Option to specify an email address when the defined participant is an external user. **Note:** ○ When you select a value in User field, the Participant email field will be an optional field. When you do not select a value in User field, the Participant email field will be a mandatory field. ○ The value in the Participant email field is cleared when you save or update the template with the Advanced script field selected. ○ This field is available only when signing type is AdobeSign or DocuSign.
Table	Table (sys_user table or any table extending sys_user table) from which you are choosing to populate the variables.
Document template	Name of the document template.
Document task template	Template selected on the Document Template task table to populate additional details for the document task, such as description and short description for fill, sign and review tasks. **Note:** If additional details are not defined, the default values of the template are used in the document template task.

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Field	Description
Due date source	Due date for the document task that is created for that participant.
Date offset type	Due date for the document task is picked from the task record. Additionally, you can offset the due date by days, weeks or months.
Advanced script	Option to display the Script field.
Script	Script indicating the participant conditions with User ID, Participant name and Participant email. This field is enabled only when the Advanced script field is selected.
Optional	When enabled, a participant will be skipped if the participant user and participant email is not available. This check is done during runtime only and not while configuring the template.

6. Click **Submit**.

Result
The participant is added to the document template.

Mark a signature block

Specify the area in the PDF document where you want to collect the signatures of participants.

Before you begin
Role required: sn_doc.admin

Important: You can mark signatures only if you have defined participants and mapped users to those participants.

Procedure
1. Navigate to **All** > **Document Template** > **All Document Templates**.
2. Select the PDF document template you want to use.
3. Configure a PDF document template.
4. Create participants for a PDF document template.
5. Click **Mark Signatures**.
6. In the Mark Signature Blocks window:
   a. Click **Add Field** and select the area where you want to collect the signature of a participant.
   b. In the **Name** field, specify a name for the signature mapping record.
   c. In the **Mapping** list, select a user from the mapped participants.
   d. Click **Save**.

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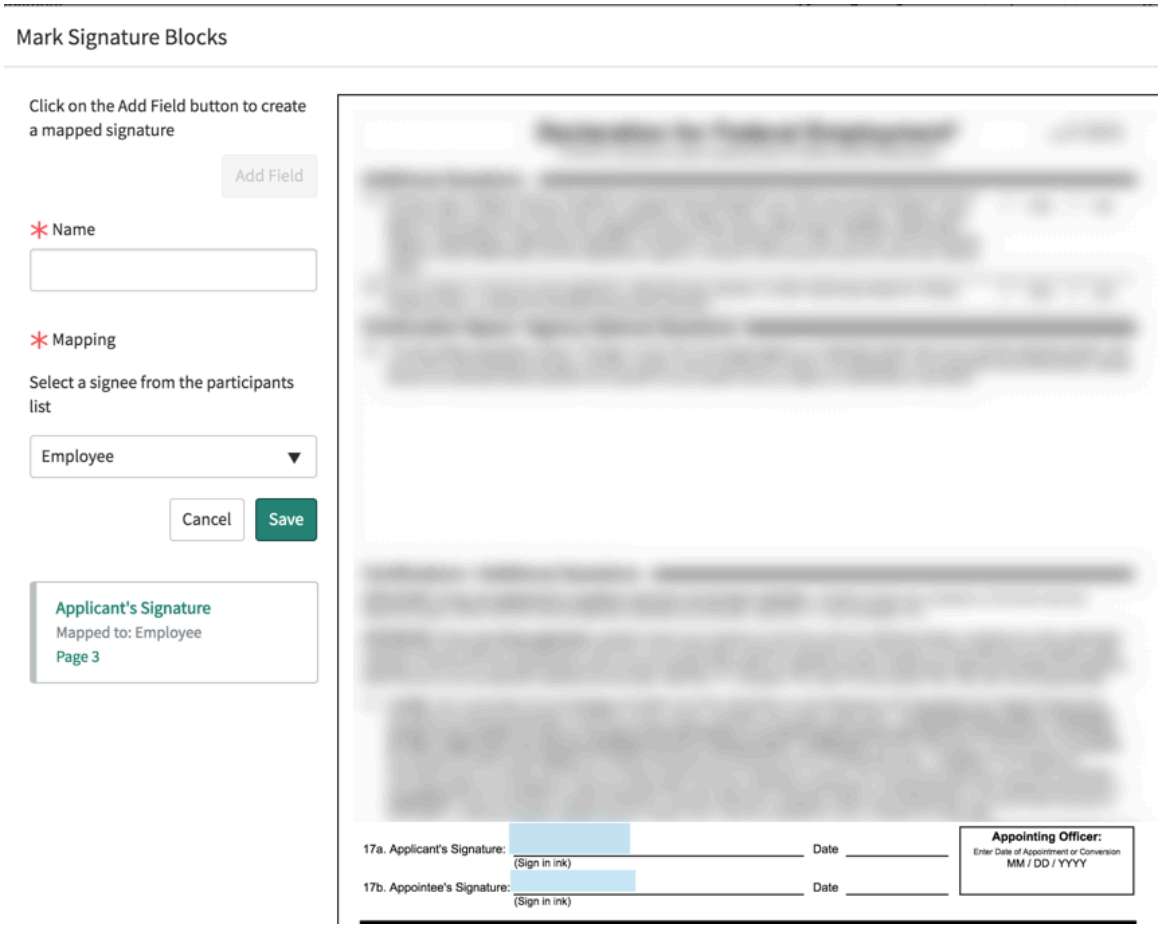

7. Click **Submit**.
   The signature mapping is added to the PDF Template Mappings section.

Document Templates configurations

Use Document Templates configurations to generate table of contents and page numbers on a PDF document that is generated from an HTML template.

> **Note:** Only if the *com.snc.pdfgenerator.html2pdf.api.version* property is set to 2 (default), the Table of Contents and Page number configuration features are available to use. If the *com.snc.pdfgenerator.html2pdf.api.version* property is set to 1, the Table of Contents and Page number configuration features are not available to use.

Create a TOC configuration in Document Templates

Create a TOC configuration to generate Table of Contents in a PDF document that is generated from an HTML document.

Before you begin

Role required: sn_doc.writer

Procedure

1. Navigate to **Document Templates** > **Document Configuration** > **Table of Contents Configurations**.
2. Click **New**.
3. On the form, fill in the fields:

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Table of Contents Configuration form

Field	Description
Name	Name of the Table of Contents configuration.
Title	Table of Contents title that appears in the generated document.
Type	Table of Contents is displayed in a list view in the generated PDF document.
Heading numbering	Format in which you want the page numbers of the headings to be displayed. The values are: ○ None ○ Decimal
Table leader	Gap between the heading and page number. Table leader helps to correlate a section or a heading with its page number. The values are: ○ None ○ Dotted
Clickable	Enable or disable clickable links inside the generated Table of Contents.
Show page numbers	Option to display page numbers on the generated PDF document. **Note:** This option makes the page number configuration field on the document template mandatory.
Application	Application scope in which the TOC configuration is created.
Start numbering after table of contents	Option to begin page numbers after TOC ends. **Note:** ○ This field appears only when the **Show page numbers** field is enabled. ○ This field overrides the **Start numbering from page** field in page number configuration.

4. Click **Submit**.

Create a page number configuration in Document Templates

Create a page number configuration to automatically generate page numbers in a PDF document that is generated from an HTML document.

Before you begin
Role required: sn_doc.writer

Procedure

1. Navigate to **Document Templates** > **Document Configuration** > **Page Number Configurations**.
2. Click **New**.
3. On the form, fill in the fields:

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Page Number Configurations form

Field	Description
Name	Name of page number configuration.
Page number format	Format in which page numbers are displayed on the generated PDF document: **Decimal**
Start numbering from page	Page from which you want the numbering to begin. **Note:** The value in this field is overridden by the **Start numbering after table of contents** in TOC configuration.
Application	Application scope in which the page number configuration is created.
Position	Vertical position of the page number: **Header** or **Footer**
Horizontal alignment	Horizontal alignment of the page number: **Left**, **Center**, or **Right**

4. Click **Submit**.

Using Document Templates

Learn how to use Document Templates.

Using Document Templates: HR Service Delivery

Learn how to use Document Templates along with the HR Service Delivery application.

Note: Only HTML and PDF document templates are supported in HR Service Delivery. Word document templates is not supported in HR Service Delivery.

Activate plugin

As an administrator, activate the Document Templates plugin [com.snc.document_templates].

Generate document tasks for participants

To use the Document Templates application for filling, signing, and approving a document online, perform the following steps:

1. Configure a document template by defining participants, defining tasks for participants, and inserting signatures. For configuring PDF document templates, see Document Templates of type PDF (Advanced forms), and for configuring HTML document templates, see Document Templates of type HTML.
2. Associate the document template to an HR case template.
3. Add the HR case template while you Configure an HR service.
4. Create a case under the configured HR service.
5. Generate document tasks manually or automatically, see Document tasks generation. Participants receive document tasks for filling, signing, and reviewing a document. When the document tasks of all the participants are complete, the final document is added as an attachment to the case.

https://player.vimeo.com/video/1127369374?h=c58fe945bd&badge=0&autopause=0&player_id=0&app_id=58479

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Generate a PDF document

To use the Document Templates application for generating a PDF document, perform the following steps:

1. Create a document template. For configuring PDF document templates, see Document Templates of type PDF (Advanced forms), and for configuring HTML document templates, see Document Templates of type HTML.

   Note: Defining participants and inserting signatures is not required if you want to use Document Templates only for generating documents.

2. Associate the document template to an HR case template.
3. Add the HR case template while you Configure an HR service.
4. Create a case under the configured HR service.
5. Click **Preview document**.
6. If you want to modify the content in the document template, click **Edit**.

   Note: If you make any changes to variables in the HTML document template, you will no longer be able to reset the variables to their original values. You will have to enter the variable values manually.

7. To generate a PDF copy of the document template, click Re**generate**.

Document tasks generation

Document tasks can be generated either automatically or manually. The tasks get generated in the order defined for the participants.

Note: Cancelling an HR case leads to the cancellation of document tasks associated with it. If you do not want the document tasks to be cancelled automatically, navigate to **All** > **System Definition** > **Business Rules** and inactivate the following business rules:

- Initiate Cancel Document Tasks
- Cancel Document Tasks

Automatically

Document tasks are automatically initiated for the participants when you:

- Select the **Automatically Initiate Document tasks** option on the HR service of a case.

  Note: Make sure that the HR template configured in the HR Service has document template associated to it.

- Change the state of the HR case to **Ready**.

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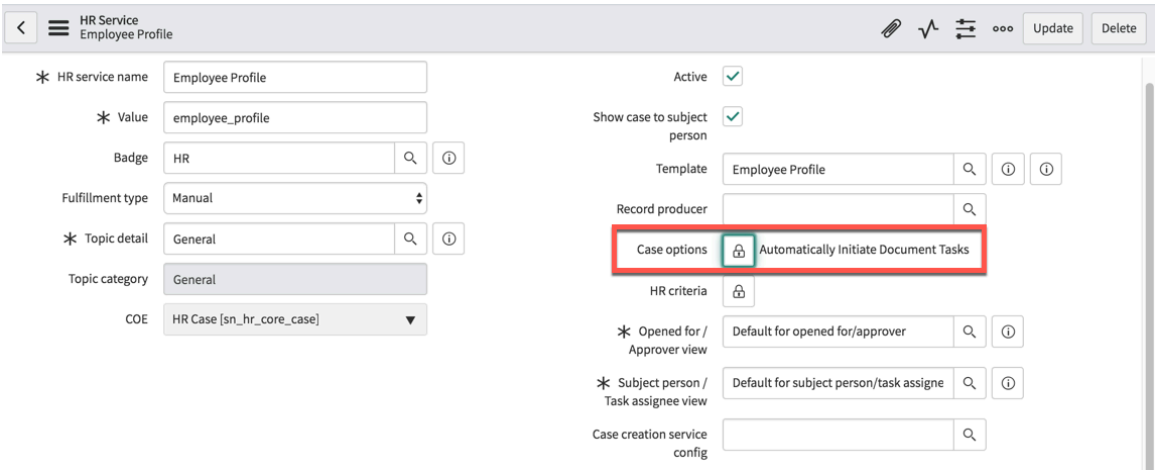
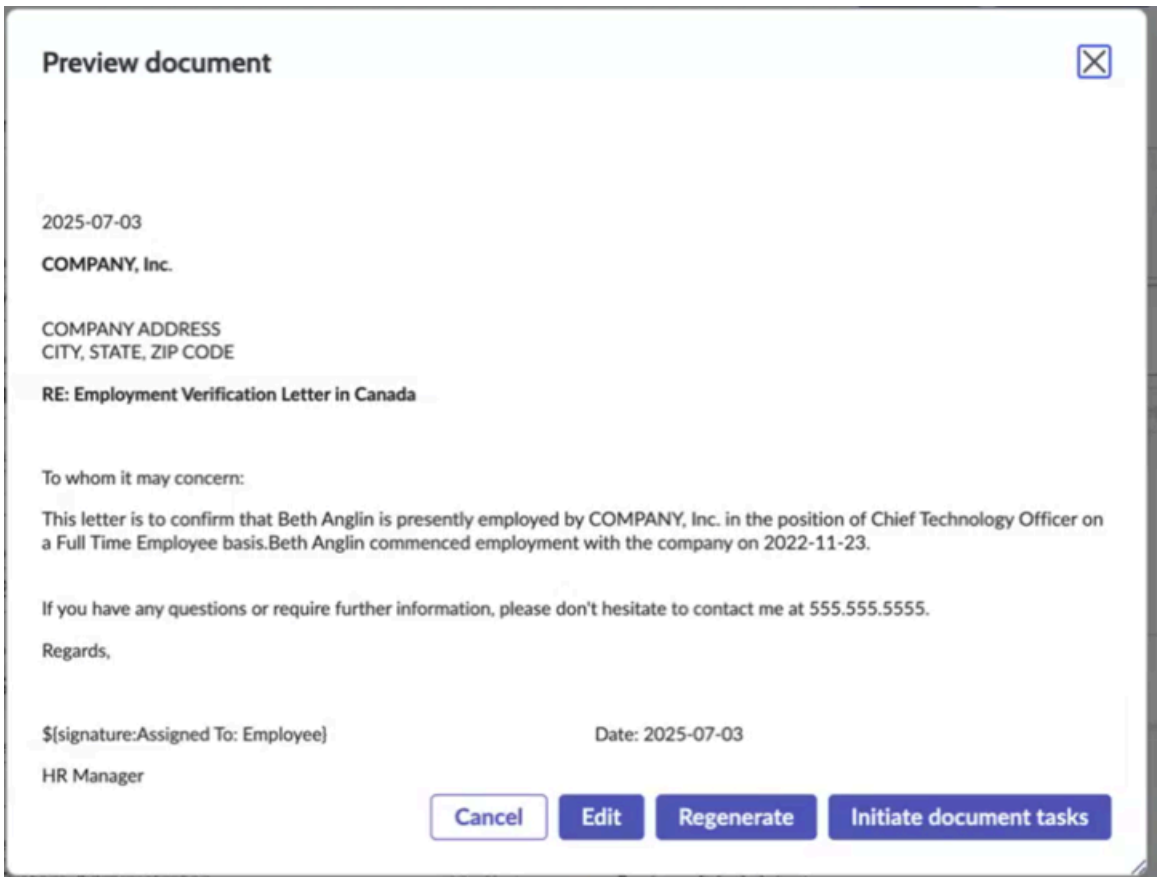


Manually

Document tasks are manually initiated when you click the **Initiate document tasks** button on the **Preview Document** option on the case.

Note: The **Initiate document tasks** option does not appear when the **Automatically Initiate Document tasks** option is already enabled on the HR service of a case.



Note: Initiating document tasks from a Preview model is not available for a word document template.

Using Document Templates: Custom use case

Understand how to use Document Templates outside of HR Service Delivery.

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Before you begin

Role required: admin

Procedure

1. Define a document template for a given table, for example, Incident table.
2. To generate a PDF document from a document template, use the following API:

```
/**
* Description: Method to generate a PDF from a document template.
* @param {GlideRecord} recordId (GlideRecord of task table)
* @param {documentTemplateId} docTemplateId (sysId of document template)
* @param {String} pdfName name of generated pdf (Optional, if not passed then it will be
 taken from template name)
* @return {sysId} (sysId of the attachment)
*/
new
 sn_doc.GenerateDocumentAPI().generateDocumentForTask(recordId,
 documentTemplateId, pdfName)
```

3. If participants are configured for the document template, use the following API to initiate document tasks for participants:

```
/**
* Description: Method to prefill document with mapped values and attach it to record table.
* @param {GlideRecord} taskGr (GlideRecord of task table)
* @param {String} htmlBody html body of document (Optional, if not passed then it will be
 generated from template for html template)
* @param {SysId} docTemplateId (sysId of document template)
* @param {String} generatedPdfName name of generated pdf (Optional, if not passed then it
 will be taken from template name)
* @param {String} documentId (word template attachment sysId) (Only for word templates)
* @return {boolean} true/false
*/
new sn_doc.GenerateDocumentAPI().initiateDocumentTasks(taskGr,
 htmlBody, docTemplateId, generatedPdfName, documentId)
```

4. To view the document tasks that are associated to a record:

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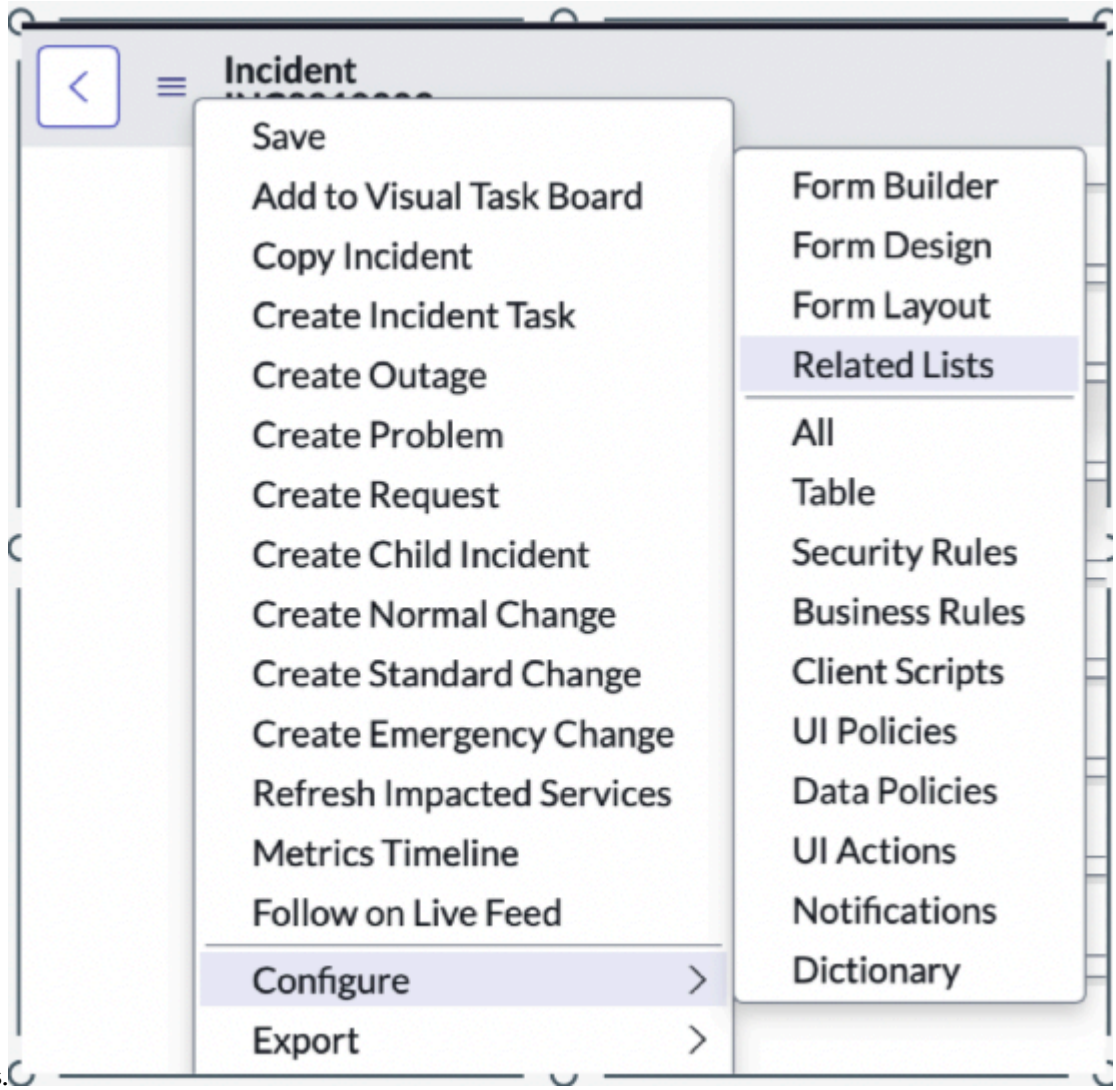
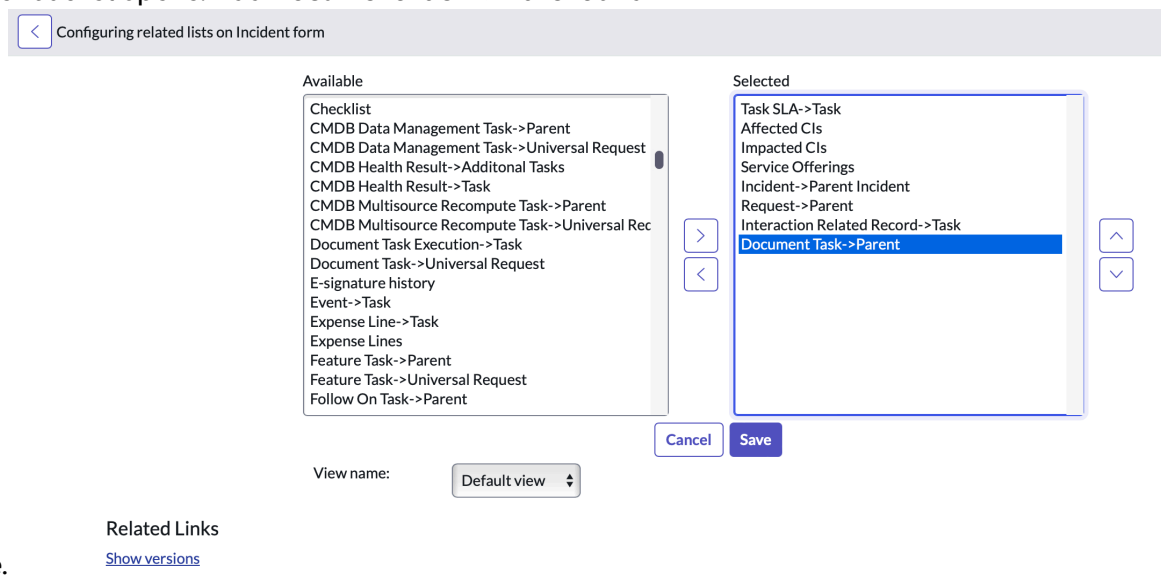
a. Open the record, for example, an incident record.

b. Configure the related lists.



A slushbucket opens. Add **Document Task -> Parent** and **Save**.



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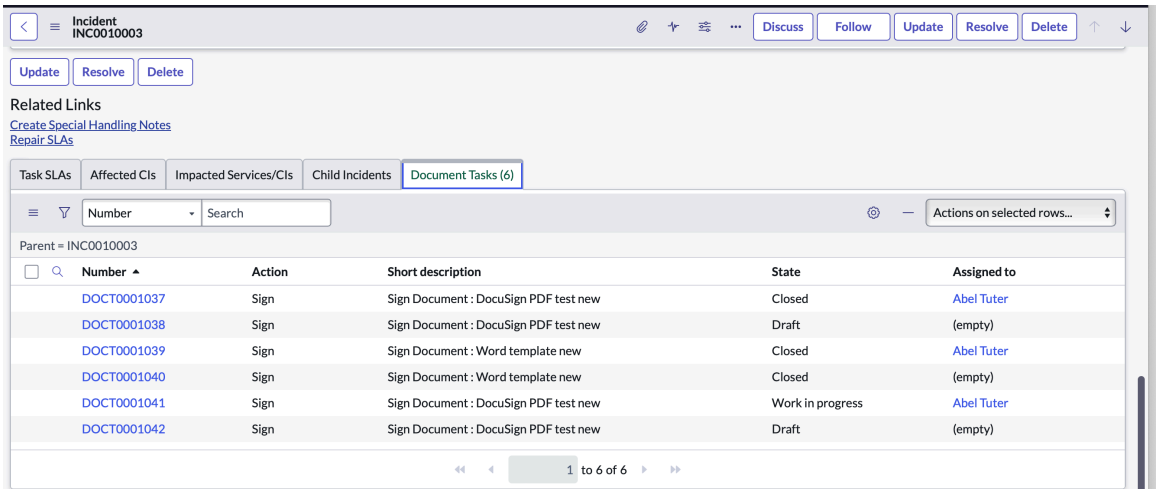
Document tasks associated to the record are displayed in **Document tasks** related list.



Working on a document task

Complete your document tasks from Employee Center.

Before you begin

Role required: none
You must have activated the Employee Center (com.sn_hr_service_portal) plugin.

Procedure

1. Navigate to **All** > **Self-service** > **Employee Service Centre**.

   Important: Alternatively, you can complete your document tasks by navigating to **Self-Service** > **My Document tasks**.

2. Select the To-dos page.
3. Work on any one of these document tasks that is assigned to you.

Fill and sign a PDF document

Complete your document task by filling in the required details and submitting the PDF document.

Before you begin

- Role required: none
- This content applies only to the document templates that are created in the Document Templates application (sn_doc). Document Templates is different from HR Document Templates. For HR Document Templates, refer to .

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center**.
   Alternatively, you can complete your document tasks by navigating to **Self-Service** > **My Document Tasks**.

   Note: PDF signing is also supported on Mobile Browser and NowMobile for the following signing types: ServiceNowSign, AdobeSign, and DocuSign.

2. Select the To-dos page.

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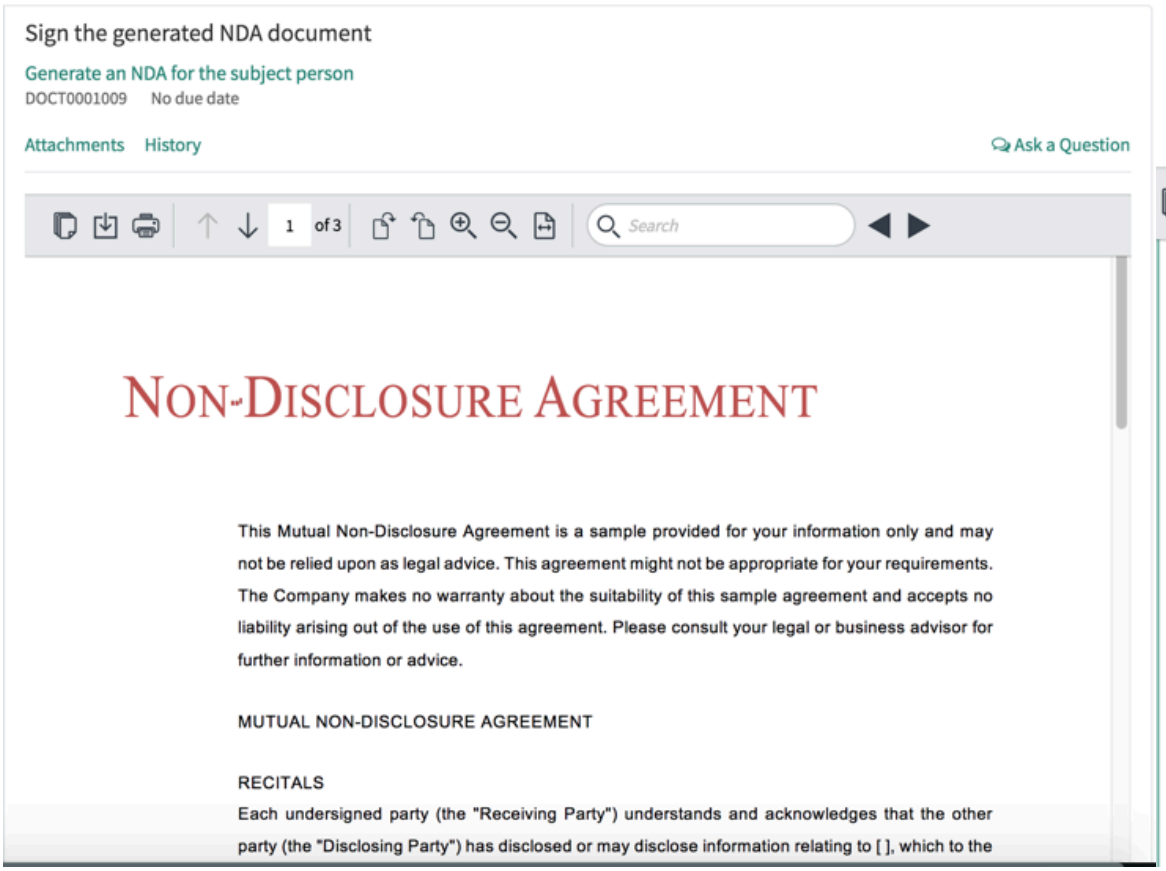
3. Select the document task (filling) that is assigned to you.
4. Fill details in the editable fields.
5. Click the **Please Acknowledge** check box.
   This check box is displayed only if **Acknowledgement text** is added on the template.
6. Add your signature by typing or drawing.
7. If you want to clear the signature and sign again, click **Clear Signature**.
8. To view your signature in the document, click **Generate**.
9. To save your changes in the document, click **Save**.
10. Click **Submit**.
    The task is complete and appears in your Completed To Dos section. You can view and print the document with the submitted details.

Example of a fillable PDF document



Sign an HTML document

Complete your document task by signing and generating a PDF copy of the HTML document.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center**.
   Alternatively, you can complete your document tasks by navigating to **Self-Service** > **My Document Tasks**.
2. Select the document template task (signing) that is assigned to you.

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3. Add your signature by typing or drawing.

   Note: If you do not agree with the content in the document, you can select the **I don't want to sign this document** option. You must enter your reason for declining, followed by **Decline and complete** to complete the task. The option to decline signing appears only when the **Signing Type** is **ServiceNow**.

4. Click **Clear Signature** if you want to clear the signature and sign again.
5. To view your signature in the document, click **Generate**.
6. Click **Submit**.
   The task is complete and appears in your Completed To Dos section. You can view and print the document with the signatures.

Review a PDF document

Complete your document task by reviewing a PDF document. Send your review comments to one or more participants who are working on the document.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center**.
   Alternatively, you can complete your document tasks by navigating to **Self-Service** > **My Document Tasks**.
2. Select the To-dos page.
3. Select the document template task that is assigned to you.
4. Click **Review document**.
5. If you do not have any comments, click **Approve**.
6. If you want to add a note in the document:
   a. In the **Field Note** field, add your comments. If you want to associate the comment to a specific field, select the value from the **Field** list.
   b. Click **Add**. You can edit or delete the note if required. You can also save your changes and review them again at any point in time.
7. Click **Send Notes**.

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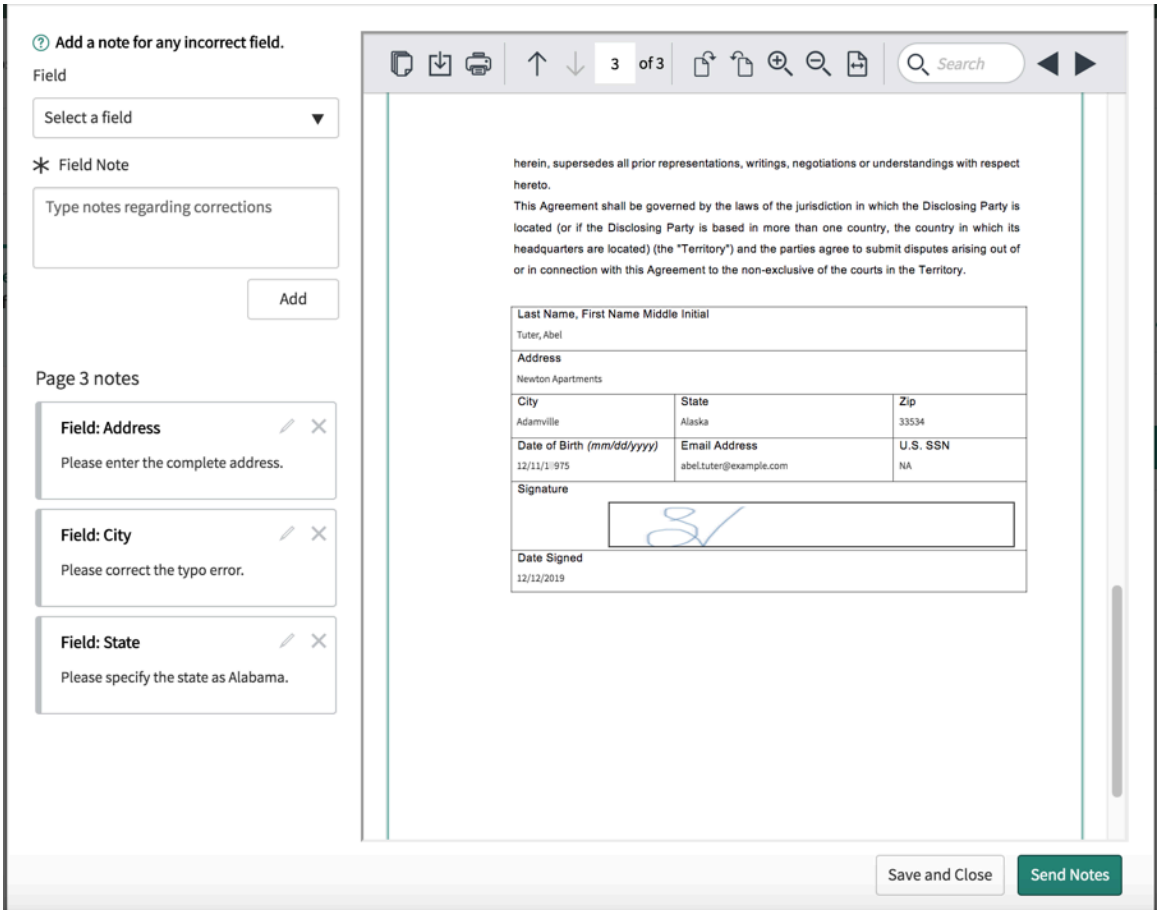

The state of the document task is changed to Complete Rejected. Document tasks are reinitated for all the participants of the template.

Resubmit a PDF document

Complete your document task by incorporating the reviewer's suggestions.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center**.
   Alternatively, you can complete your document tasks by navigating to **Self-Service** > **My Document Tasks**.
2. Select the To-dos page.
3. Select the document task that is assigned to you.
4. If a change note has been associated to a field, clicking**View Page** will navigate you to that field directly.
5. Select the check box to indicate that you have incorporated the change note.
6. Add your signature by typing or drawing.
7. If you want to clear the signature and sign again, click **Clear Signature**
8. To view your signature in the document, click **Generate**.
9. Click **Resubmit**.

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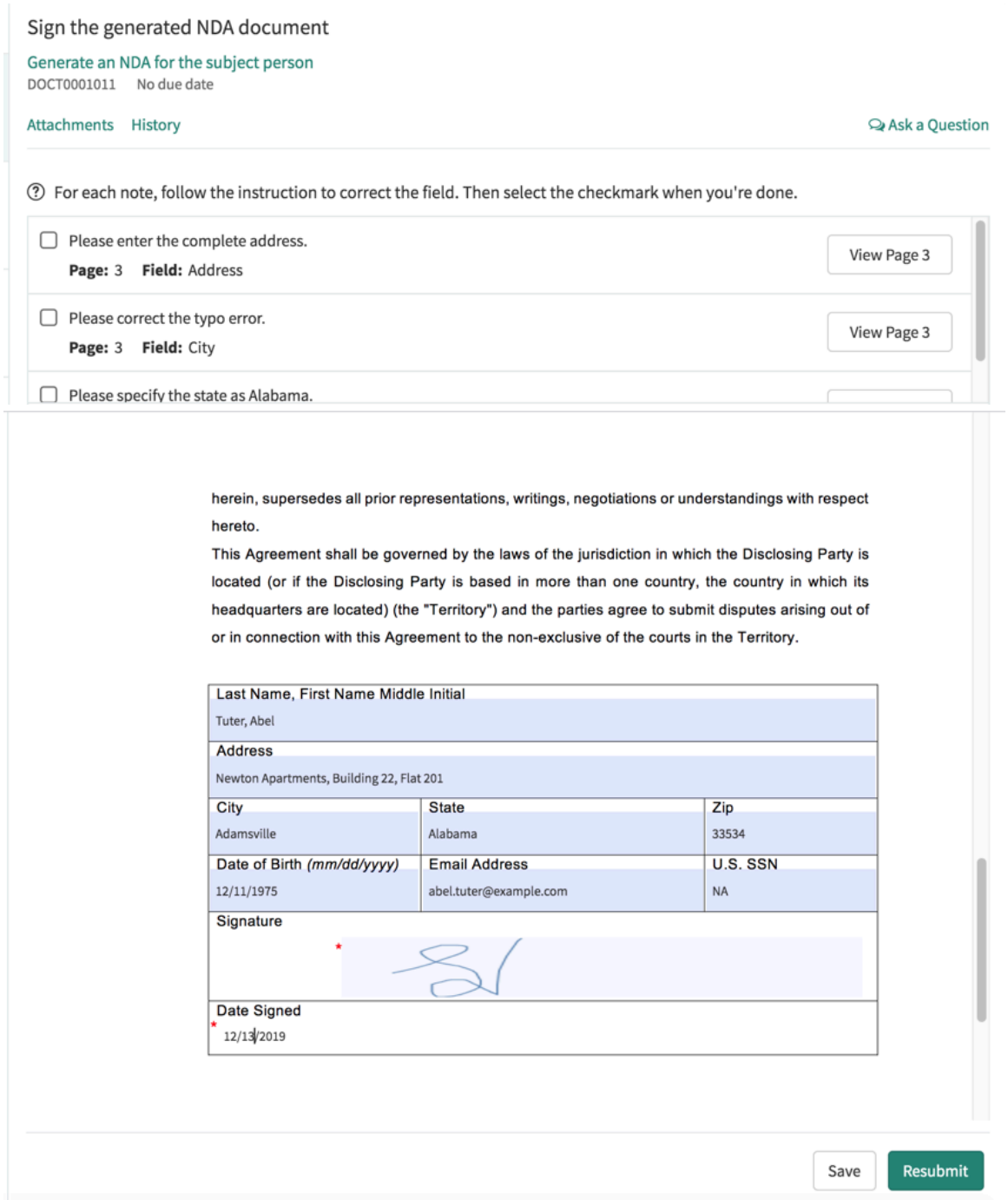

The task is complete and appears in the Completed To Dos section. You can view and print the document with the submitted details.

Using Guided Tours in Document Templates

Use Guided Tours in Document Templates to get instructions on how to create a document template.

Before you begin

Role required: sn_doc.admin or sn_doc.writer

About this task

Guided Tours help train and onboard users within the workspace. Each tour is designed to provide an overview, guide you through a task, or complete a process. If needed, administrators can create more tours. For more information, see Guided Tours.

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When you visit a page that has a guided tour for the first time, a welcome screen appears. You can choose to either begin the tour or skip the tour. The tour can be revisited from the Help Center menu.

Procedure

1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Select **New**.
3. Select one of the following templates:
   - **HTML Document Template**
   - **PDF Document Template**
4. Select the **Show help** icon ().
5. **Optional:** Select the **Pin Help Center menu** icon  to pin the Help Center side panel on the page.
6. Select **Take a Tour**.
7. Take the necessary action and select **Next** to progress through the tour.
   For ending the tour at any point, you can select **End Tour** in the side panel or select the **Close** button in the pop-up window and confirm to end the tour.
8. Select **Done** after the tour is ended.

Reference for Document Templates

Reference topics provide additional information about Document Templates.

Components installed with Document Templates

Several types of components are installed with activation of the Document Templates plugin, including tables and user roles

Demo data is available for this feature.

Roles installed

Document template roles and descriptions

Role title [name]	Description	Contains roles
Document templates reader [sn_doc.reader]	• Provides read-only permission to document templates. • Can only view the Table of Contents and Page number configurations in a configured HTML template.	None
Document templates writer [sn_doc.writer]	• Provides read and write permissions to document templates. • Can add the Table of Contents and Page number configurations to an existing HTML template or a new HTML template.	• sn_doc.reader • doc_toc_config_writer • doc_page_number_config_writer

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Document template roles and descriptions (continued)

Role title [name]	Description	Contains roles
Document templates administrator [sn_doc.admin]	Provides read, write, and delete permissions to document templates.	sn_doc.writer

Tables installed

Document template table descriptions

Table	Description
PDF Template Mapping [sn_doc_pdf_template_mapping]	Table to store the fields mappings of a PDF document template.
HTML Template [sn_doc_html_template]	Table to store HTML document templates.
PDF Template [sn_doc_pdf_template]	Table to store PDF document templates.
Participant [sn_doc_participant]	Table to store the details defined for participants.
Document Task [sn_doc_task]	Table to store document template tasks.
Document Task Note [sn_doc_task_note]	Table to store the details of review notes.
Document Template [sn_doc_template]	Base table for PDF Template and HTML Template tables.
Document Template Category [sn_doc_template_category]	Table to store document template categories.
Document Template Script [sn_doc_template_script]	Table to store document template scripts.
Table of Contents Configurations [doc_toc_config]	Table to store TOC configurations that are used in an HTML template.

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Document template table descriptions (continued)

Table	Description
	Note: This table is available by default with ServiceNow Platform. However, the menu shortcuts to navigate to this table are available with the Document Templates application only.
Page Number configurations [doc_page_number_config]	Table to store page number configurations that are used in an HTML template. **Note:** This table is available by default with ServiceNow Platform. However, the menu shortcuts to navigate to this table are available with the Document Templates application only.

Frequently Asked Questions (FAQs) on Document Templates

Find answers to some common questions on Document Templates.

Refer to this KB0966931.

HR e-signature

Sign electronic documents from any desktop or mobile device with e-signature. E-signature is a scoped application that enables users to sign managed documents, knowledge articles, or HR document templates with their typed or drawn e-signature, their credentials, or as an acknowledgment.

Note: Find answers to some common questions on E-signature. See this KB0966931.

The e-signature [com.snc.esign] plugin activates the sn_esign.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only e-signature admin user by requiring a minimum number (default is two) of active users with this role.

HR e-signature is a **non-embedded signature** capability for managed documents, and knowledge articles, attached to an HR task for fulfilment. It supports three signing types (Acknowledgement, Credential, and Signature) and two document types (Managed Documents and Knowledge Articles).

HR and e-signature roles

By default, the following HR roles contain the following e-signature roles.

Properties for HR Roles and E-signatures

HR Role	E-signature role
HR administrator [sn_hr_core.admin]	E-signature administrator [sn_esign.admin]
HR basic [sn_hr_core.basic]	E-signature manager [sn_esign.config_manager]

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You can use the assignments as-is or change them. To change the default assignments, see Components installed with e-signature for information on how to assign a role to another role, group, or user.

How to use e-signature templates with HR tasks

Users with the HR administrator [sn_hr_core.admin] or basic [sn_hr_core.basic] role can create e-signature templates. Each e-signature template pairs a document type to sign (managed document, knowledge article, or HR document template) with a signature type (signature, credential, or acknowledgment). For example, you could create an e-signature template for a non-disclosure agreement that requires a typed or drawn signature.

For more information, see Configure an e-signature template.

You can then use the e-signature templates in HR tasks or HR task templates to request signatures from users.

Note: On the HR task form, make sure that the HR task type sets to **E-signature**.

- Adding an HR task to an HR case
- Configure an HR task template

Migrating existing HR task templates and open HR tasks to e-signature

Migrate existing HR task templates and open HR tasks to the new HR task type for e-signature with the **Migrate HR e-signature tasks** scheduled job. The scheduled job automatically updates the HR task type and e-signature template based on your existing configurations. It also disables the old HR task types for credential, e-signature, and sign document.

For more information, see Migrate existing HR task templates and open HR tasks to e-signature.

Activation information

E-signature automatically activates when you activate Case and Knowledge Management. If it does not activate, you can manually activate e-signature. For information on what components install with the feature, see Components installed with e-signature.

Related topics

E-signature

Select an HR document template for an e-signature task

If the document type of the e-signature template you are using is an HR document template, then you must select the HR document template that the signatory will sign on the HR case form.

Before you begin

Role required: sn_hr_core.basic or sn_hr_core.case_writer

Depending on the HR service you are using to request the e-signature, you may need to configure the HR case form so that the **PDF template** field appears and an HR document template can be selected.

Procedure

1. Navigate to **HR Case Management**, and create a new or open an existing HR case.
2. On the HR case form, in the **PDF Template** field, select an HR document template.

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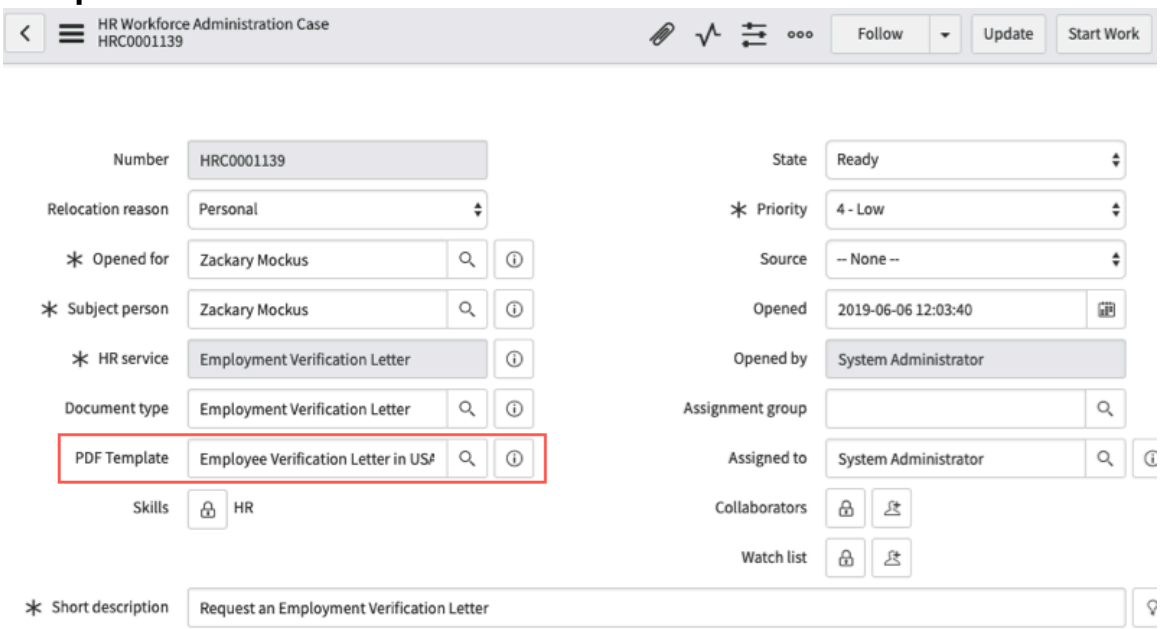
Note: If the **PDF Template** field is not visible, make sure that the HR case form for the HR service you are using is configured to show that field. See Configure the HR case form for an HR service for more information, and also HR case form configuration examples for an e-signature-specific example.

Example



3. Assign the case to a user.
4. Click **Ready to Work**.

What to do next

The user to whom the case is assigned can:

1. Click **Start Work**.
2. Click **Preview Document**.
3. From the Preview Document window, click **Generate** to generate the document for signing. The document to sign is added as an attachment to the HR case form.

Migrate existing HR task templates and open HR tasks to e-signature

Migrate existing HR task templates and open HR tasks to the new HR task type for e-signature with the **Migrate HR e-signature tasks** scheduled job. The scheduled job automatically updates the HR task type and e-signature template based on your existing configurations. It also disables the old HR task types for credential, e-signature, and sign document.

Before you begin

Role required: sn_hr_core.admin

About this task

Important:

Starting with the Australia release, HR task types: Credential, E-signature (e_signature), and Sign Document are now deprecated and no longer supported or available for new activation. E-signature provides the latest experience for this functionality.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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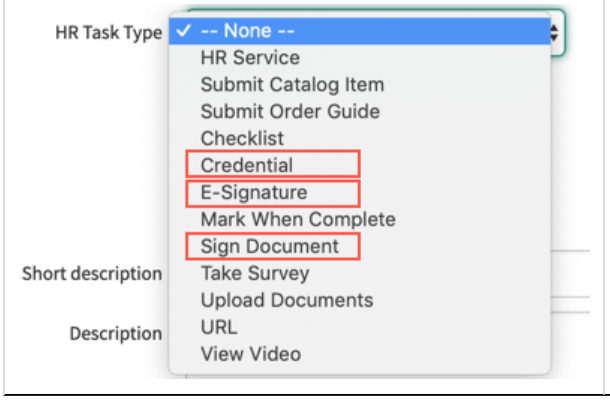
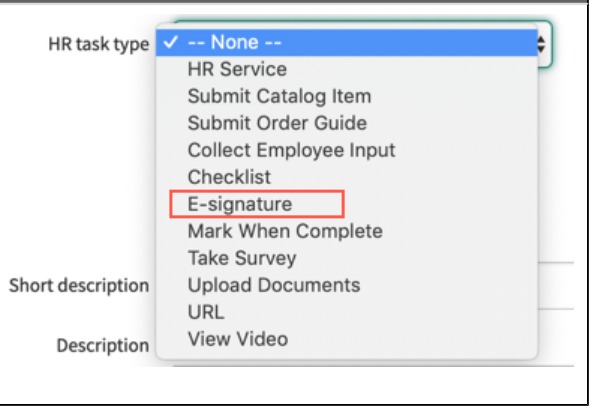
The **Migrate HR e-signature tasks** scheduled job migrates existing HR task templates and open HR tasks from the **Credential**, **E-Signature**, and **Sign Document** HR task types to the new **E-signature** HR task type.

Pre-migration	Post-migration
	

The associated document and signature configurations are also migrated to new or existing e-signature templates. If an e-signature template for the applicable document and signature configuration already exists, then the existing e-signature template is used. Otherwise, a new e-signature template is created.

Pre-migration HR task type	Post-migration e-signature template
Credential	• Document type: Managed document • Signature type: Credential
E-Signature	• Document type: Managed document • Signature type: Signature
Sign Document	• Document type: HR document template • Signature type: Signature

Finally, the HR task types for **Credential**, **E-Signature**, and **Sign Document** are disabled. Only the new HR task type for **E-signature** remains.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Migrate HR E-signature Tasks** scheduled job.
3. Click **Execute Now**.
   Depending on the data you have, the migration may take some time.
   - Existing HR task templates are updated to the e-signature task type and an e-signature template.
   - Open HR tasks are updated to the e-signature task type and an e-signature template.
   - HR task types for **Credential**, **E-Signature**, and **Sign Document** are disabled.

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Migrating from HR Document Templates to Document Templates

Review these guidelines to successfully migrate from HR Document Templates to Document Templates. Document Templates provides the latest experience of HR Document Templates functionality with additional features and capabilities.

Important:

Starting with the Australia release, HR Document Templates is deprecated and no longer supported or available for new activation.

Use Document Templates that provides the latest experience for this functionality. For migration guidelines, see Migrating from HR Document Templates to Document Templates.

For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Review the following details to understand the key offerings and differences between HR Document Templates and Document Templates.

Functionality and Table Comparison: HR Document Templates and Document Templates

Table/ Feature	HR Document Templates	Document Templates
Template	HR Document Template [sn_hr_core_document_template]	Document Template [sn_doc_template]
Document Type/ Category	Document Type [sn_hr_core_document_type]	Category [sn_doc_template_category]
Criteria	HR Criteria [sn_hr_core_criteria]	User Criteria [user_criteria]
PDF template mappings	PDF Template Mapping [sn_hr_core_pdf_template_mapping]	Template Mapping [sn_doc_pdf_template_mapping]
Participants	Participants are not supported. You must directly map user fields in HTML template body or PDF template mappings.	Participants are supported. Participant details are stored in the Participant [sn_doc_participant] table. You must map participants for signing in HTML body and PDF template mappings. For an HTML template, see Create participants for an HTML document template. For a PDF template, see Create participants for a PDF document template.
HTML Template Translation	-	Supported See Use Localization Framework for Document Templates

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Functionality and Table Comparison: HR Document Templates and Document Templates (continued)

Table/ Feature	HR Document Templates	Document Templates
HTML template blocks	-	Supported See Document blocks in Document Templates.
HTML template scripts	-	Supported See Document template scripts.
HTML template TOC	-	Supported See Create a TOC configuration in Document Templates.
User action	Only one action type is supported: Signing	Different action types are supported (Fill, Review and Signing) based on the template type. For an HTML template, see **Action type** in Create participants for an HTML document template. For a PDF template, see **Action type** in Create participants for a PDF document template.
Tasking	Tasking is done through HR tasks.	Tasking is done through document tasks based on configured participants.
Signing type	For HTML, only ServiceNow signing is supported. For PDF, all three signing types are supported: ServiceNow Sign, DocuSign, and AdobeSign.	For both HTML and PDF, all three signing types are supported: ServiceNow Sign, DocuSign, and AdobeSign. **Note:** • Template must be created in ServiceNow. • Only signing is supported in external system. • Templates that are created in DocuSign or AdobeSign are not supported in the Document Templates application.
HR case fields to be used in case template		
Document template	PDF template (pdf_template)	Document template (document_template).
Document type/ category	Document type (document_type)	Document template category (document_template_category)

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Functionality and Table Comparison: HR Document Templates and Document Templates (continued)

Table/ Feature	HR Document Templates	Document Templates
HR service configuration		
Case option	Automatically create draft document	Automatically Initiate Document tasks Automatically initiate document tasks based on participant configuration. See .

Migrate HR Document template (HTML) to Document Template

Follow the steps for migrating HR Document template (HTML) to Document template (HTML).

Before you begin

Role required: admin

Procedure

1. Create a document template category in the Category [sn_doc_template_category] table (if HR Document template has a document type associated with it).
2. Navigate to **Document Template** > **HTML template**.
3. Click **New**.
4. Fill in the form fields, such as Name, Table, Category, Body, Language, similar to HR Document template and save it.

   If there is any signature token (Signature token: ${signature}, ${<-user_field->.signature}) in HTML body, remove it and save the template.
5. If HR document template has HR criteria associated with it, select the corresponding user criteria in the new document template.
6. Find participants based on signature tokens in old HR document template body, and create participant records in the **Participant** related list in the new Document Templates.
   After a participant is created, add the signature token by clicking **Insert signature**. In the legacy HR Document Templates body, signature token is supported in the format ${<-user_field->.signature} while in new Document Templates body, signature token is supported in the format ${signature:<-participant_user_name->}.
7. Publish the template by clicking **Publish**.
8. Update the case template to use the new document template or category.
   See the HR case fields in the Functionality and Table Comparison: HR Document Templates and Document Templates table in Migrating from HR Document Templates to Document Templates.

Migrate HR Document template (PDF) to Document Template

Follow the steps for migrating HR Document template (PDF) to Document Template (PDF).

Before you begin

Role required: admin

If you want to migrate your AdobeSign or DocuSign templates to Document Templates:

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1. Download your organization's AdobeSign or DocuSign PDF templates from AdobeSign or DocuSign accounts, and convert those templates to fillable forms.
2. Manually create corresponding Document Template PDF template records and upload the downloaded PDFs. See the steps mentioned in the following procedure.
3. Update the HR Service and HR Template configurations as required to align with the new PDF Document Templates that have been created.

Procedure

1. Create a document template category in the Category (sn_doc_template_category) table (if HR Document template has a document type associated with it).
2. Navigate to **Document Template** > **PDF template**.
3. Click **New**.
4. Fill in the form fields, such as Name, Table, Category, and Language, similar to that of HR Document Templates.
5. If HR document template has HR criteria associated with it, select the corresponding user criteria in the new document template.
6. Select **Attachment type** as **Select from document revision**, and add **Document revision** used in the HR document template.
7. Select the corresponding signing type and **Save**.
8. Click the **Parse PDF** related link.
   Template mapping records are created. Update the mapping fields.
9. Create a participant record with action type **Sign** for each user who needs to sign the document.

   Note: This step is required only when legacy HR Document Template has PDF Template mapping record with Document field type as **Signature**.

10. Publish the template by clicking **Publish**.
11. Update the case template to use the new document template or category.
    For more information, see the HR case fields in the Functionality and Table Comparison: HR Document Templates and Document Templates table in Migrating from HR Document Templates to Document Templates.

Agent Workspace for HR Case Management

Agent Workspace for HR Case Management (Configurable) is one of two workspaces available for the HR Service Delivery application and uses the Next Experience user interface. It is built on a configurable UI Builder version, which makes it easy to configure and extend according to business needs.

Comparison between HR Service Delivery Core UI, HR Service Delivery Agent Workspace (Classic), and Agent Workspace for HR Case Management (Configurable)

HR agents can work on HR cases using HR Service Delivery Core UI, HR Service Delivery Agent Workspace (Classic), or Agent Workspace for HR Case Management (Configurable). Review the following details to understand the key offerings and differences between these applications:

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- The HR Service Delivery Core UI enables you to create, view, or work on an HR case in a form view.
- The HR Service Delivery Agent Workspace (Classic) gives you the ability to create custom workspaces from the Agent Workspace framework.

Important:

- HR Service Delivery Agent Workspace (Classic) is now deprecated and no longer supported or available for new activation. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
- If you are an existing user of HR Service Delivery Agent Workspace (Classic), you can migrate to the Agent Workspace for HR Case Management (Configurable) for enhanced features and capabilities. See Migration Guidelines.

- The Agent Workspace for HR Case Management (Configurable) is a refactored version of the classic agent workspace experience built on a configurable UI Builder version. This application puts all the tools that you need in one place so that you can interact with employees, respond to inquiries, and resolve issues quickly.

Note: If you're a new customer of HR Service Delivery, activate the Agent Workspace for HR Case Management (Configurable) application from the ServiceNow® Store.

Functionality comparison: HR Service Delivery Core UI, HR Service Delivery Agent Workspace (Classic), and Agent Workspace for HR Case Management (Configurable)

Functionality availability	HR Service Delivery Core UI	HR Service Delivery Agent Workspace (Classic)	Agent Workspace for HR Case Management (Configurable)
Personalize landing, record, list, and case creation pages	✗	✗	✓
Single-pane view	✗	✓	✓
Integrate communication channels	✗	✓	✓
Agent assist	✗	✓	✓
Leverage UI Builder • Edit component properties • Utilize variants and audiences	✗	✗	✓

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Functionality comparison: HR Service Delivery Core UI, HR Service Delivery Agent Workspace (Classic), and Agent Workspace for HR Case Management (Configurable) (continued)

Functionality availability	HR Service Delivery Core UI	HR Service Delivery Agent Workspace (Classic)	Agent Workspace for HR Case Management (Configurable)
• Next Experience UI Branding • Styling Configuration			
Multi-tab view	✗	✓	✓
List view	✓	✓	✓
Record view	✓	✓	✓
Case creation	✓	✓	✓
Bulk case creation	✓	✗	✓
Add checklists for HR cases	✓	✓	✓
Contextual side panel	✗	✓ **Note:** Only a few features are available in the contextual side panel. For a new set of features introduced in the panel, migrate to Agent Workspace for HR Case Management (Configurable).	✓
Create reminders to enable timely communication	✗	✓	✓
Create additional cases while working on an HR case	✗	✓	✓
Send email feature	✗	✓	✓
Create and use interaction records	✓	✓	✓
ML-driven personalizations	✓	✓	✓
Supports employee	✓	✓	✓

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Functionality comparison: HR Service Delivery Core UI, HR Service Delivery Agent Workspace (Classic), and Agent Workspace for HR Case Management (Configurable) (continued)

Functionality availability	HR Service Delivery Core UI	HR Service Delivery Agent Workspace (Classic)	Agent Workspace for HR Case Management (Configurable)
document management			
Agent chat	✗	✓	✓
View Service Level Agreements(SLAs)	✓	✓	✓
Supports Conversational SMS service channel application	✗	✓	✓
Custom My Lists	✗	✓	✓
Document templates	✓	✓	✓
Response templates	✗	✓	✓

Get started

Explore

Learn more about Agent Workspace for HR Case Management.

Configure

Plan and configure your implementation.

Use

Learn how to use HR Agent Workspace.

Reference

Get details about components like fields, tables, and properties.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

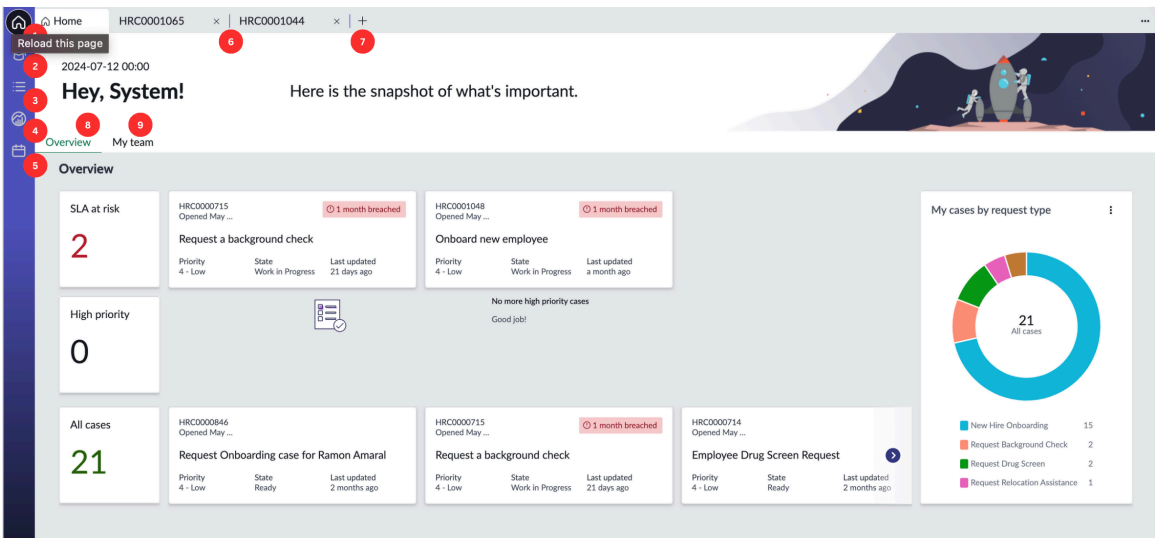
Exploring Agent Workspace for HR Case Management

Use Agent Workspace for HR Case Management to manage your employee HR requests from one place.

Agent Workspace for HR Case Management home page

The Home page is the starting point in exploring Agent Workspace for HR Case Management. On the left hand side you will see a list of icons. You can access these icons from any screen.

The Home page shows high priority cases, cases at risk for violating service level agreements (SLA), and cases with recent changes.



Agent Workspace home page callout descriptions

Number	Agent workspace elements	Description
1	Home icon	The Home page provides you with an overview of your work at a glance. It provides you with information that can help you decide what you should act on first, like HR cases and items that affect your team.
2	Learning icon	Learning helps you explore and manage coursework, view course activity and history, and engage with career

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Agent Workspace home page callout descriptions (continued)

Number	Agent workspace elements	Description
		development content through customizable catalogs from various sources.
3	Lists icon	The lists provide you with a view into all HR cases. You can filter and sort by what is relevant to you. Select to view a list of HR cases, interactions, HR tasks, and more. For more information, see Lists in Agent Workspace for HR Case Management.
4	Analytics Center	The Analytics Center provides an overview of your most important dashboards and data visualizations along with a place for you to ask questions about analytics. For more information, see Platform Analytics overview.
5	Calendar icon	Use the Calendar to see work schedules and assignments, add personal events or shift swap requests or approvals.
6	Tabs	Tabs display lists, HR case numbers, and the Add icon. If you hover on an HR case number, you can quickly see more details related to a case, for example, the description of the case, HR Service and Subject person. When you have multiple tabs open, you can only see the case number on the tab by default. However, you can also configure the information you want to be displayed on the tab. For more information, see Customize tab label in Agent Workspace for HR Case Management.
7	Add icon	Select to instantly create one of the following:

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Agent Workspace home page callout descriptions (continued)

Number	Agent workspace elements	Description
		• **Create HR case**. For more information, see Create a case in Agent Workspace for HR Case Management. • **Create interaction**. An interaction is when an employee contacts an HR agent and you want to ensure the interaction is documented and captured. For more information, see Using interactions in Agent Workspace for HR Case Management.
8	Overview	Displays a graphical representation of the data based on the overall HR cases. Use this dashboard to understand the cases that need priority or the SLA (Service Level Agreement) status, general information and announcements, etc.
9	My team	Displays a graphical representation of the data related to the teams you belong to. Use this tab to understand the cases assigned to the team that need priority or the SLA status.

My team

Information related to the teams your HR agents belong to display in the **My team** section.

The bottom of the landing page provides company information, links, and tools available. This section is part of Content Delivery. For more information, see Portal content.

Use Guided Tours in Agent Workspace for HR Case Management

Use Guided Tours in Agent Workspace for HR Case Management to get instructions on how to perform a task.

Before you begin
Role required: sn_hr_core.writer

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About this task

Guided Tours help train and onboard users within the workspace. Each tour is designed to provide an overview, guide you through a task, or complete a process. If needed, administrators can create more tours. For more information, see Guided Tours.

When you visit a page that has a guided tour for the first time, a welcome screen appears. You can choose to either begin the tour or skip the tour. The tour can be revisited from the Help Center menu.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Navigate to one of the following pages:
   - Home page
   - List page
3. Select the **Show help** icon ().
4. **Optional:** Select the **Pin Help Center menu** icon  to pin the Help Center side panel on the page.
5. Select **Take a Tour**.
6. Take the necessary action and select **Next** to progress through the tour.
   For ending the tour at any point, you can select **End Tour** in the side panel or select the **Close** button in the pop-up window and confirm to end the tour.
7. Select **Done** after the tour is ended.

Setting up Agent Workspace for HR Case Management

Set up Agent Workspace for HR Case Management so that your agents can engage with your employees, answer questions, create cases, and resolve issues.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

- Install the application Agent Workspace for HR Case Management [com.sn_hr_agent_ws].
- Set up these components:
  - Communication channels and routing.
  - Additional components and settings that are specific to HR Service Delivery.
  - Forms in workspace. See Customize fields in a form in Agent Workspace for HR Case Management.
  - Workspace setup. See Configuring Configurable Workspace.

Roles installed

By installing the HR Service Delivery Configurable Workspace [com.sn_hr_agent_ws], you install the following roles:

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Roles for Agent Workspace for HR Case Management

HR role title [name]	Description	Contains workspace roles
HR manager [sn_hr_core.manager]	Grants access to all HR cases, profiles, and secure information. With this role, you can manage Agent Workspace for HR Case Management lists and categories. This role contains the Workspace List Admin, which is an elevated role. For more information on elevated roles, see Elevated privilege roles. The Workspace user [workspace_user] role allows you to access Agent Workspace for HR Case Management and create and access interactions.	Workspace List Admin [workspace_list_admin] Workspace user [workspace_user]
HR case writer [sn_hr_core.case_writer]	Grants access to write all HR cases. With this role, you can access Agent Workspace for HR Case Management and view, create, and work on existing cases. You can also access all areas of Case and Knowledge Management. This role contains the Workspace user role, which allows you to perform interaction agent and interaction queue transfers.	Workspace user [workspace_user] Interaction agent [interaction_agent]
HR agent [sn_hr_core.basic]	Grants access to basic HR agents to Agent Workspace for HR Case Management modules. This role contains the Advanced Work Assignment Agent [awa_agent] role, which allows an HR agent to work customer interactions and manages workload across multiple service channels.	• Advanced Work Assignment Agent [awa_agent] • To see all the roles contained within the HR agent [sn_hr_core.basic] role, see Components installed with Case and Knowledge Management.
Workspace content manager [sn_cd.workspace_content_manager]	Lets you schedule content to workspace. • The uxframework_user role allows you to browse and select from the library of UX component records so they	• UX framework user [uxframework_user] • Content Delivery content manager [sn_cd.content_manager]

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Roles for Agent Workspace for HR Case Management (continued)

HR role title [name]	Description	Contains workspace roles

	can set a component reference field on any accessible table.
	• The sn_cd.content_manager role grants access to Content Publishing.
	  ○ The sn_esign.config_manager role can manage the e-signature configurations.
	  ○ The sn_cd.content_approver role can approve content that is scheduled to appear on the Employee Center.
		○ E-Signature configuration manager [sn_esign.config_manager]
		○ Content Delivery approver [sn_cd.content_approver]

HR Workspace Admin [sn_hr_agent_ws.admin]	Lets you configure all aspects of Agent Workspace for HR Case Management. The workspace_admin role allows you to configure Agent Workspace • The chat_admin role administers the chat tables. • The uxframework_designer role has write access to UX page element records for designing UIs. • The agent_workspace_user role allows you to perform interaction agent and interaction queue transfers. • The sn_agent_recommend.recommendation_admin role manages agent assist recommendation configurations. • The interaction_admin role allows you to administer the Interaction Management system. • The workspace_list_admin role allows you to manage workspace lists and categories. • The ui_action_admin role allows you to manage UI actions.	Workspace administrator [workspace_admin] • Chat admin [chat_admin] • UX framework designer [uxframework_designer] • Agent workspace user [agent_workspace_user] • Agent recommendation admin [sn_agent_recommend.recommendation_admin] • Interaction admin [interaction_admin] • Workspace list admin [workspace_list_admin] • UI action admin [ui_action_admin] • UI Builder admin [ui_builder_admin] • UX framework user [uxframework_user] • Similarity Analyzer [sn_intel_analyzer.similarity_analyzer_admin] • Form admin [form_admin] • Personalize form [personalize_form] • UI notification admin [ui_notification_admin]

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Roles for Agent Workspace for HR Case Management (continued)

HR role title [name]	Description	Contains workspace roles
	• The ui_builder_admin role provides permission to use the UI Builder APIs so you can create, update, read, and delete UX pages. • The uxframework_user role allows you to browse and select from the library of UX component records so they can set a component reference field on any accessible table. • The sn_intel_analyzer.similarity_analyzer_admin role allows you to administer the Similarity Analyzer. The Similarity Analyzer defines patterns and trends that can help you resolve a record. • The form_admin role manages forms, form sections, and section elements. • The personalize_form role allows you to personalize forms. • The ui_notification_admin role allows you to configure notification triggers.	

Agent Workspace for HR Case Management Guided Setup

The Guided Setup enables you to configure Agent Workspace for HR Case Management for your agents so that they can access HR cases, tasks and communications all from one location.

Agent Workspace for HR Case Management Guided Setup provides an introduction to starting your configuration. It also organizes configuration activities into categories. Complete the activities in each of the categories to customize the workspace for your human resources organization. Each category provides information like planning guidance, pre-setup steps, and links to useful information. Each category also provides links to the pages in your instance where you perform the configuration.

To access Agent Workspace for HR Case Management Guided Setup, navigate to **HR Case Management** and select Agent Workspace for HR Case Management Guided Setup. Select the **Get Started** button on the landing page to start the configuration.

In the Agent Workspace for HR Case Management Guided Setup page, you will see a list of different categories. Select the **Get Started** button under each category to start the configuration.

For more information on **Guided Setup**, see Using guided setup.

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Install Agent Workspace for HR Case Management

Install Agent Workspace for HR Case Management (com.sn_hr_agent_ws) from the ServiceNow Store.

Before you begin

Go to the ServiceNow Store and download the Agent Workspace for HR Case Management app.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

Go to **All** > **HR Case Management** > **Agent Workspace for HR Case Management Guided Setup**. Complete the activities in each of the categories to customize the workspace for your organization.

RCA approvals in Agent Workspace for HR Case Management

After you install or upgrade to the latest Agent Workspace for HR Case Management from ServiceNow Store, you might encounter Restricted Caller Access (RCA) approval messages in the HR Agent Workspace.

Before you begin

Role required: admin

Install the Agent Workspace for HR Case Management application. The RCAs that are generated after the installation are in the Requested state and you must manually mark the RCAs as allowed, which can be time-consuming.

To automate the RCA approvals for any record, you can run the HR Agent WS bulk RCAs approval script where the source scope is the Agent Workspace for HR Case Management application. Download the HR Agent WS bulk RCAs approval file from ServiceNow Store.

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Perform the following steps:

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Right-click the header and choose **Import XML**.
3. Click **Choose file** and select the XML file that you downloaded.
4. Search and find the HR Agent WS bulk RCAs approval script record.
5. Click **Run Script** to approve all the requested RCAs.

> **Note:** RCA fix script can approve the RCAs which exist at the time of execution. After running the RCA script (if you install the Document Templates from ServiceNow Store, Human Resources Scoped App: Lifecycle Events, and Human Resources Scoped App: Employee Relations plugins), re-run the RCA script to approve the new RCAs.

UI Builder for Agent Workspace for HR Case Management

Use UI Builder to build pages in Agent Workspace for HR Case Management using Next Experience and custom web components.

For more information about UI Builder, see UI Builder.

Create a landing page variant

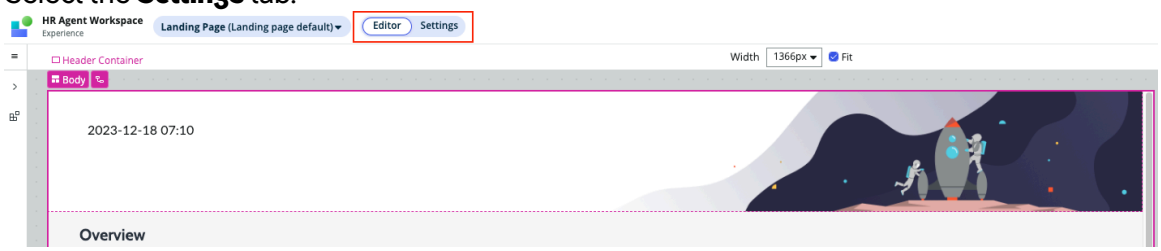
Create a variant of your landing page to build a custom portal experience for your users.

Before you begin

Role required: sn_hr_agent_ws.admin and sn_hr_core.basic

Procedure

1. Navigate to **All** > **HR Case Management** > **UI Builder for Agent Workspace for HR Case Management**.
2. Select **Landing page default**.
3. Select the **Settings** tab.



4. Select **Duplicate**.

   If the **Duplicate** action in the **Actions** column is not selectable and a message about a different application scope is displayed, select the **Edit in original scope** button.

5. Enter the name of your variant.
6. **Optional:** Define who can view your page by selecting **Add an audience** and selecting or defining the audience.
   For more information, see Learn about audiences.
7. Select **Create**.
8. In the **Order** field, set the order of the variant to a lower value than the Landing page default. The order of the variant defines the copy to be used.

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Landing page configuration example

Learn how to configure a landing page through an example configuration process.

Before you begin

Create a variant of your landing page. For more information, see Create a landing page variant.

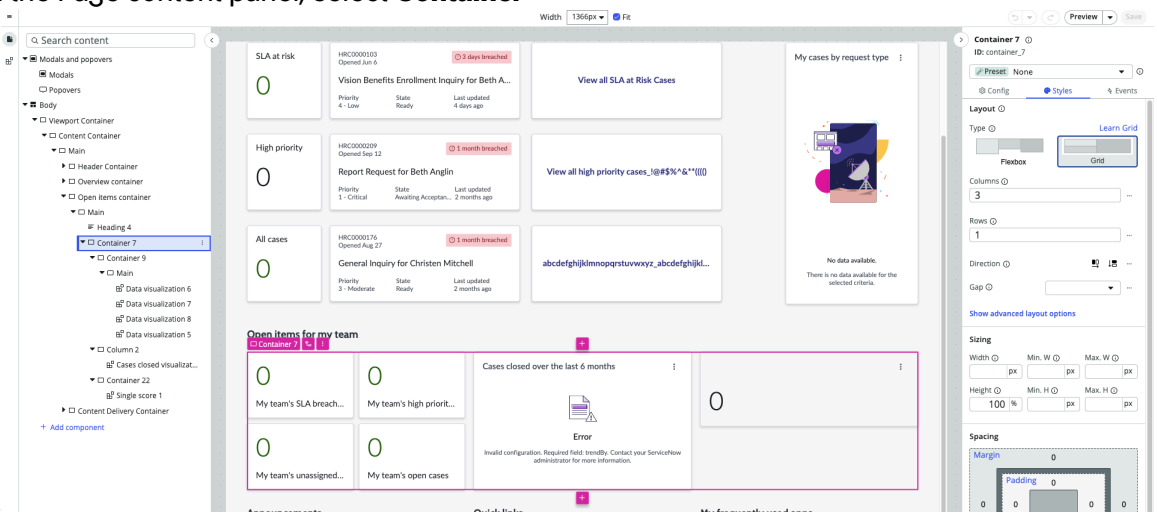
Role required: sn_hr_agent_ws.admin and sn_hr_core.basic

About this task

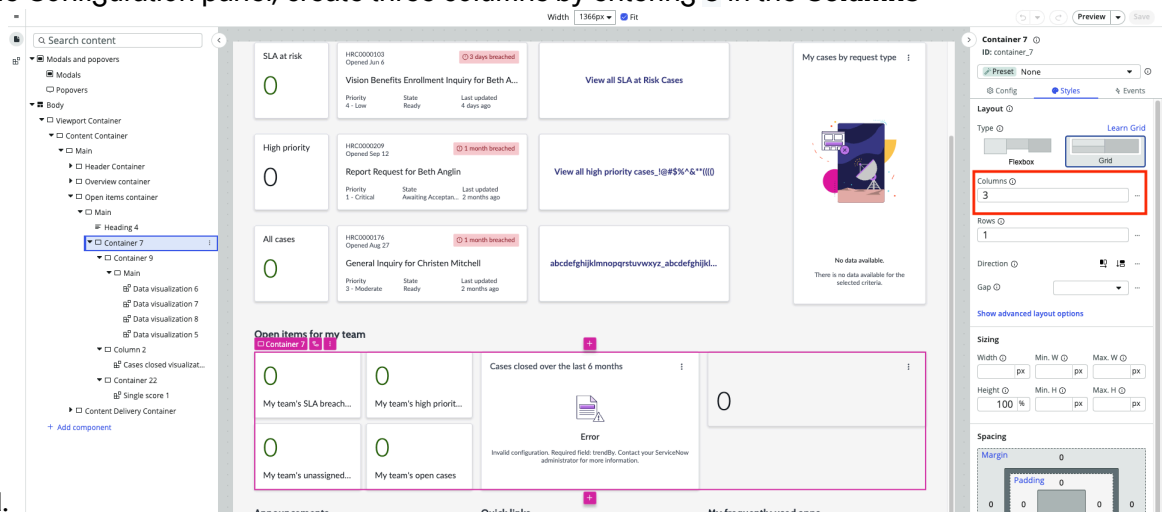
The configuration example shows how you would configure an **HR Cases closed in the last week** report beside the **Cases closed over the last 6 months** report on a landing page.

Procedure

1. Navigate to **All** > **HR Case Management** > **UI Builder for Agent Workspace for HR Case Management**.
2. Select your variant.
3. Select the **Editor** tab if it is not already selected.
4. In the Page content panel, select **Container**



5. In the Configuration panel, create three columns by entering 3 in the **Columns** field.



6. Select the more icon (⋮) beside **Column 2**.
7. Select **Add after**.
8. Select the **Components** tab and select **Container**.

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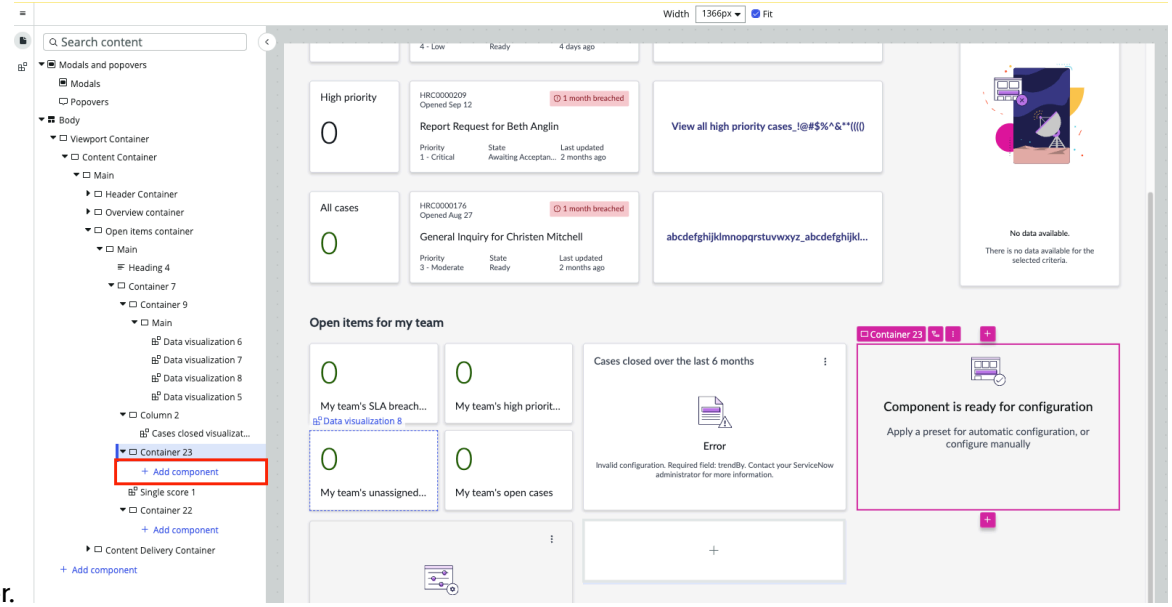
A container is an area of the page where you add information, images, or functionality (your components). You can have several containers on a page, nest containers within containers, and include several components in the containers.

9. Add a component by selecting **+Add component** under the container.

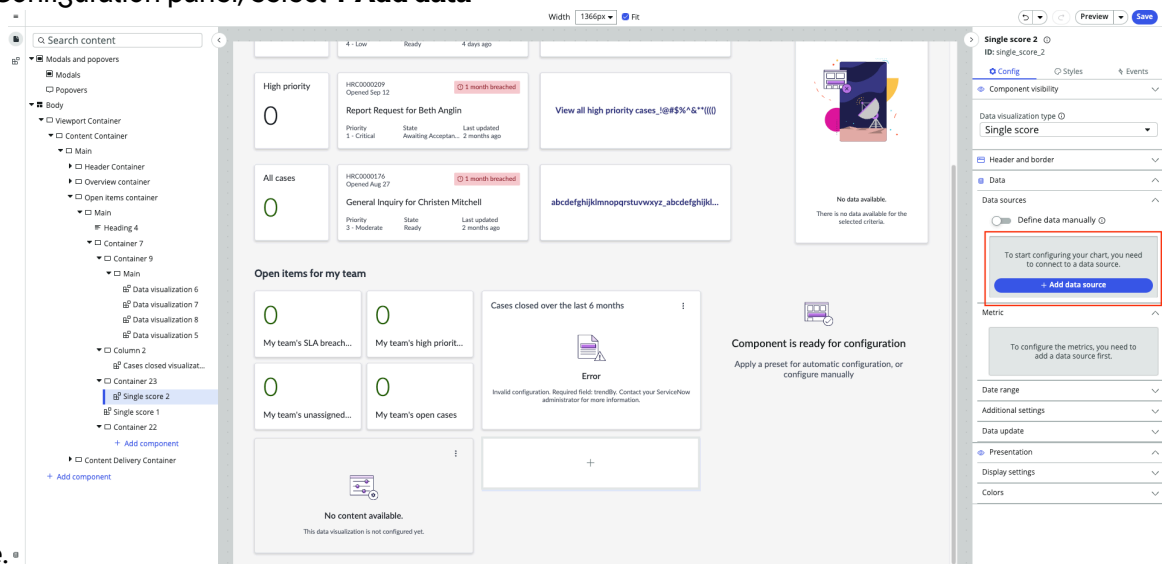


This example uses **Container 23**.

10. Select the **Data visualization** component.

11. Add a data source.

    a. In the Configuration panel, select **+ Add data source**.



    b. In the **Select a source** field, enter `HR Case`.

    c. Select the **sn_hr_core_case** table.

    d. Select **+Add custom conditions**.

    e. Add a condition with the following values:

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- Select field: `Assignment group`
- Select operator: `is (dynamic)`
- Enter value: `One of my groups`

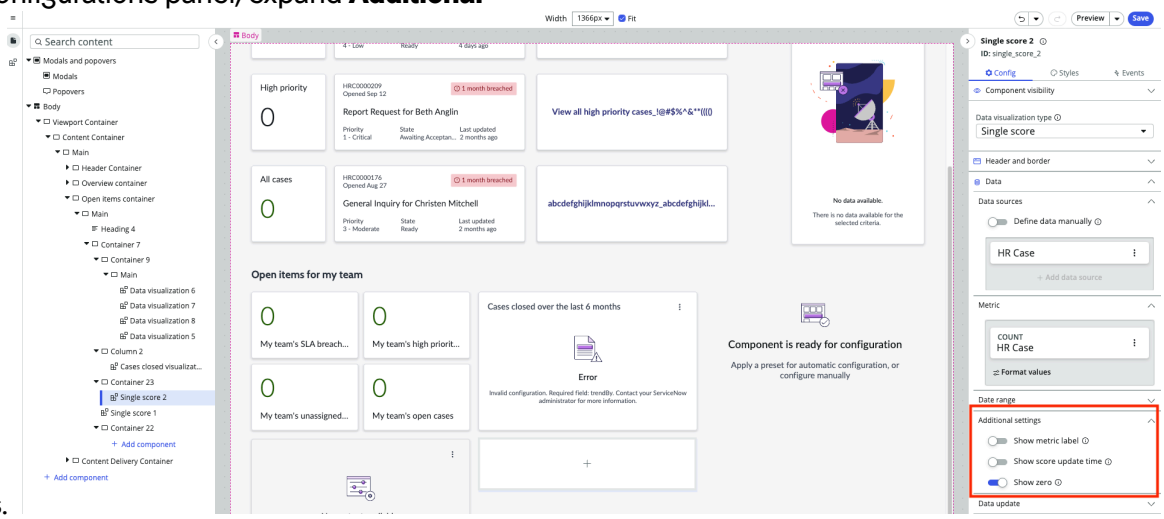
f. Refine the condition by selecting **AND**.
You can create dependent conditions by selecting **AND** or **OR**.

g. Add a condition with the following values:

- Select field: `Closed`
- Select operator: `at or after`
- Enter value: `Last week`

h. Select **Add this source**.

12. In the Configurations panel, expand **Additional settings**.



13. Add additional data to display by enabling **Show metric label** and **Show score update time**.

14. Select **Save**.

15. Make the variant the default landing page by changing the order of the original landing page.

a. Select **Landing page default** from the drop- down list.

b. Select the **Settings** tab.

c. Enter a number greater than 0 in the **Order** field.

d. Select **Save**.

Enable a detailed data display within a report

Enable users to visualize a subset of report data.

Before you begin

Role required: sn_hr_agent_ws.admin and sn_hr_core.basic

Procedure

1. Navigate to **All** > **HR Case Management** > **UI Builder for Agent Workspace for HR Case Management**.
2. Select your variant.

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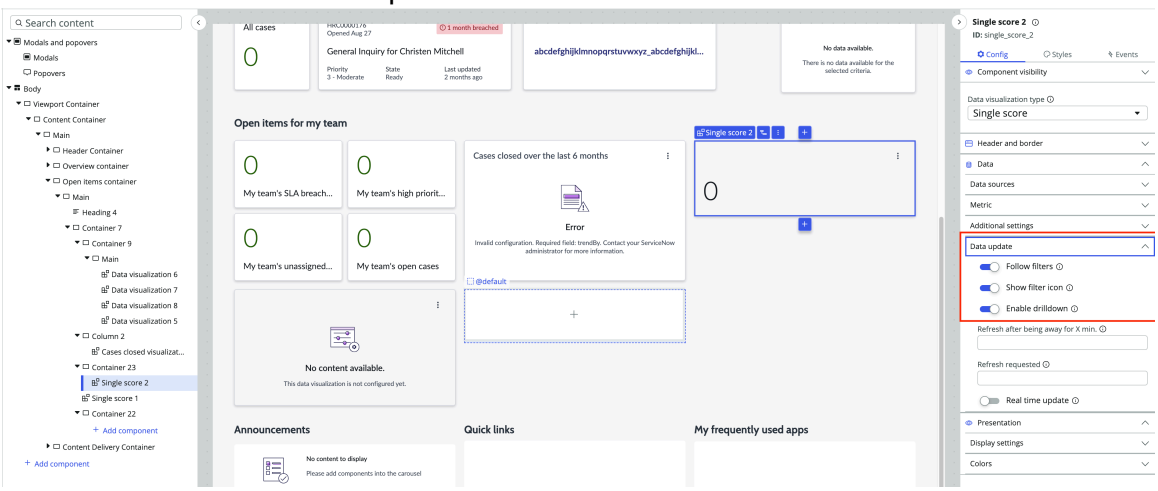
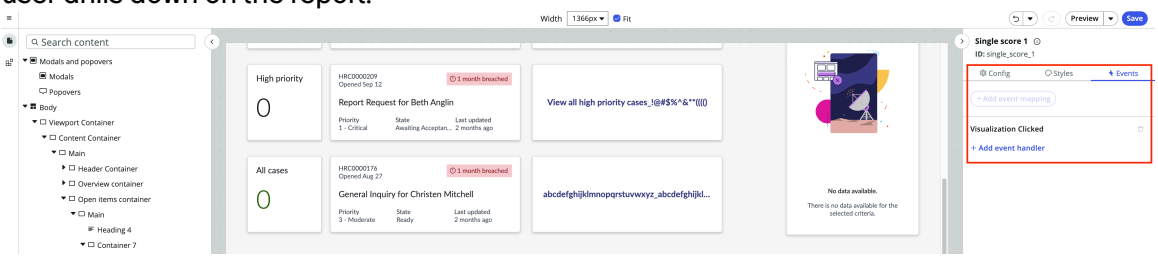
3. Select the container containing your report.
4. In the Configuration panel, select **Data update**.
5. Turn on the **Enable drilldown** option.



6. In the Events panel, select **+Add event handler** to map the data that is displayed when the user drills down on the report.



7. In the **Search item** field, enter `Open cases - simple list page`.
8. Select **Open cases - simple list page**.
9. Select **Add**.
10. Select **Save**.

Configure quick links in Agent Workspace for HR Case Management

Configure quick links to quickly access internal and external resources related to specific departments within your organization.

Before you begin

Employee Center Pro must be installed. For more information, see Install Employee Center Pro.

Role required: sn_hr_agent_ws.admin and sn_hr_core.basic

Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Link Content**.
2. Create the link.
   a. Select **New**.
   b. On the form, fill in the fields.

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Link Content form

Field	Description
Name	Name of the link to content. **Note:** Ensure that you have content created in **Content Publishing** > **Content Library** > **View All**.
Type	The type of content, which for a quick link is **Link**.
URL	The URL link to the content to appear on the service portal.

c. For the **Load link in** field, select **Current page** to load the link in the current portal page.

d. Select **Submit**.

3. Define when and where you want your content to be available.

a. Navigate to **All** > **Content Publishing** > **Schedule Content**.

b. Select **New**.

c. On the form, fill in the fields.

Schedule Content form

Field	Description
Content	The content or information you want to make available as set in the link definition.
Active	Option to enable the form.
Title	Name of the schedule content record.
Audience	Audience for the content.
Content location	Location where the content you're scheduling appears.
Approvers	Users who can approve the content before it's made available.
Component type	Should be set to **Quick links**.
Availability start date	Date the content should first be available to the audience.
Availability end date	Final date the content is valid.

d. Enter or verify the field values in the following table.

Schedule content form

Field	Value
Content	The newly created record

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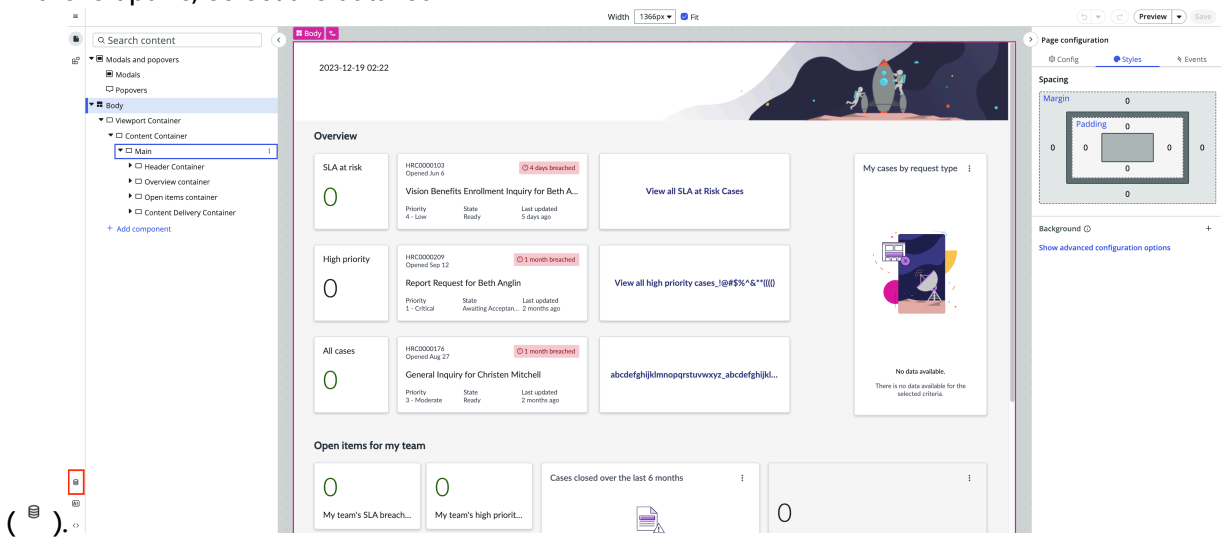
Field	Value
Content location	UIB Workspace
Component type	Quick links

e. Select **Submit**.

4. Map the link created above to the Quick link component in UI Builder.
   a. Navigate to **All** > **HR Case Management** > **UI Builder for Agent Workspace for HR Case Management**.
   b. **Optional:** Select **Landing page default** if you have not configured a landing page variant.
   c. **Optional:** Select your landing page variant.
   d. In the left pane, select the data icon



( ).

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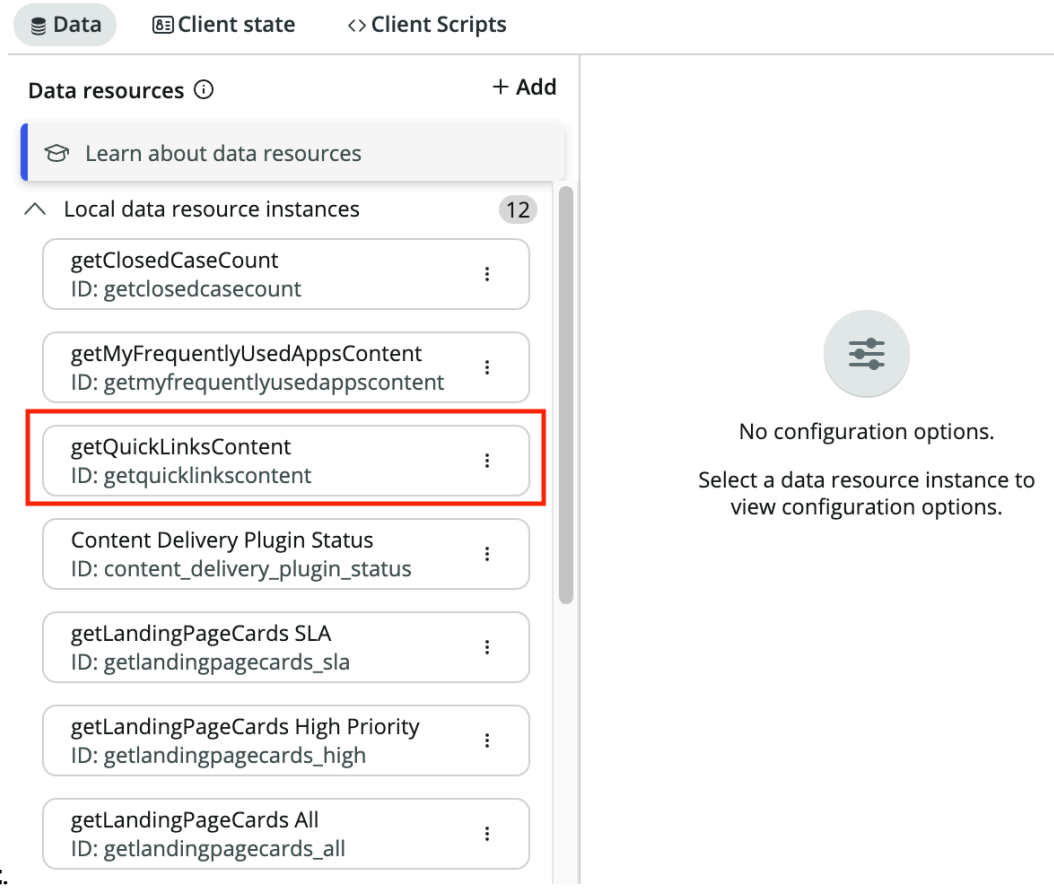
e. Select



getQuickLinksContent.

f. In the **content_id** field, enter the name given to the Content group.

g. Select **Save**.

Reorder the navigation pane modules in HR Agent Workspace

Quickly access the navigation pane modules in HR Agent Workspace. For example, Home, List, Inbox, and so on.

Before you begin

Role required: admin or ui_builder_admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. From the **Experiences** list, select **HR Agent Workspace**.
3. Select **Open in UI Builder**.
4. On the HR Agent Workspace Experience page, navigate to the Side navigation section.
   This section displays all modules in the left navigation pane in Agent Workspace for HR Case Management.
5. Drag the modules in the required order.

Page configurations

Use Page configurations in Agent Workspace for HR Case Management to provide a customized experience for your users.

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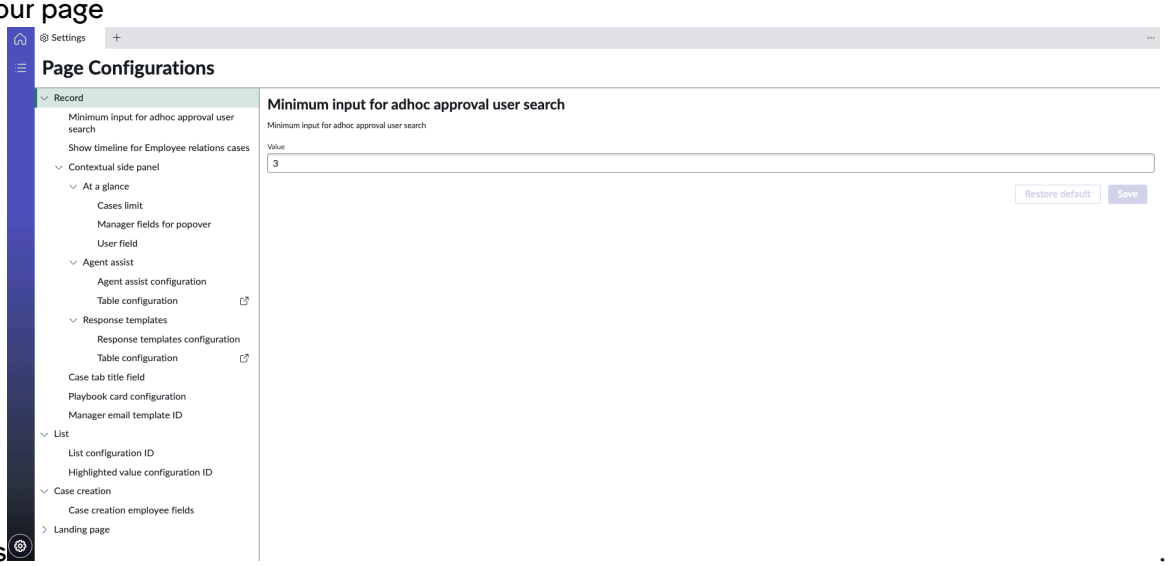
Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the settings icon ( ).
3. Personalize your page configurations



For a description of the fields, see Page Configurations reference.

Using Agent Workspace for HR Case Management

As an HR agent, use the Agent Workspace for HR Case Management to interact with employees, respond to inquiries, and resolve issues.

Note: The COEs available to you may differ depending on the HR package you have.

- The categorization of HR catalog items are employee-facing only, and have no relation to the categorization of HR services under the HR Centers of Excellence (COEs) data model.
- If you are creating a new HR service and plan to make it available for employee self-service, see HR catalog item configuration. Creating a new HR catalog item automatically creates a corresponding HR service, and you can avoid creating duplicate services.
- If you have an existing HR service that you want to make available for employee self-service, do not create an HR catalog item. (Creating a HR catalog item automatically creates a corresponding HR service.) Instead, see Configure a record producer for an HR service to add the existing service as an HR catalog item in the HR service catalog.
- The Agent Workspace for HR Case Management is highly configurable for HR agents. It supports the same functionality in the Classic HR Service Delivery Agent Workspace.

You can start work in the Agent Workspace for HR Case Management from one of these areas:

- Landing page
- List queue
- Agent inbox
- Chat
- Phone
- Global search

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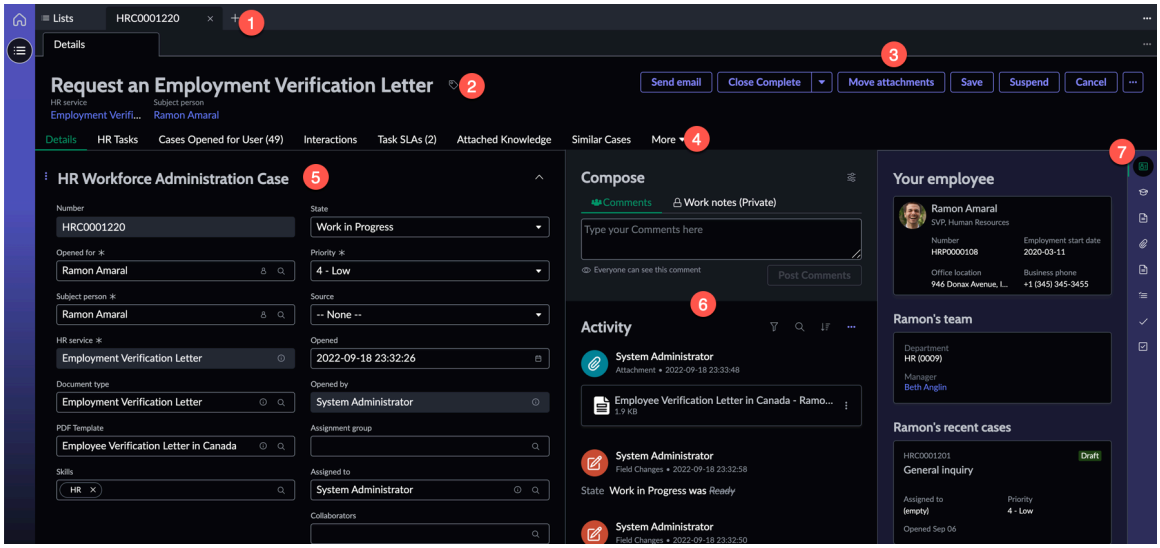
For additional information on working within Agent Workspace, see Using workspace.

HR case form enables you to manage multiple cases, view information that is related to a case, and use knowledge articles or similar cases to manage the case.



Agent Workspace case form callout descriptions

Number	Agent Workspace feature	Description
1	Tabs	Use tabs to display the records that are associated with an HR case, like case details and tasks. You can select a tab and jump to the information. Child tabs appear below the top tabs and display case details, HR profile information, and tasks. **Note:** Any reference that you select under a parent tab opens as a child tab.
2	Form header	Displays brief details of an HR case like HR service, priority, state, and assigned-to agent.
3	UI actions	Action button that enables you to save changes you made, change the status, cancel, or other relevant actions for a case. **Note:** The buttons that appear are similar to the native platform UI. The button types that appear depends on the type and status of the HR case.

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Agent Workspace case form callout descriptions (continued)

Number	Agent Workspace feature	Description
4	Related items	Use the Related Items menu to see information about the details, tasks, and other information that is associated with a case. Also shows details of the records from other tables that have a relationship with the HR case. This menu provides a quick and easy way to look up information about a case and subject person. **Note:** The type of HR case determines the tabs that appear in this menu. When a case appears under Playbook, these tabs change. For more information, see Exploring HR Service Delivery Playbook.
5	Case details	Information about the case: • Subject person • HR service requested • Priority assigned • Assignment group • Assigned agent • Description • Comments and Work notes
6	Activity stream	Comments, work notes, and current and past states of the case.
7	Contextual side panel	Manage and work on the case using various task-oriented icons. The icons appearing on the Contextual side panel depend on the type of case that you are working on. For more information, see .

HR profile icons

Icons that enable you to get quick access to information about the opened for and subject person.

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- : Select the **Open HR Profile** icon to access detailed information related to the person in the HR case. You will see details like HR profile, employee information, contact information, cases opened for the person etc. The same information is briefly displayed in the At-a-glance side panel.
- : Select the **Search for Record** icon to access a list of all related records within your company. The list is displayed relevant to the field on which you are searching. You can filter or sort in the list to refine your search results.
- : Select the Open deep link icon to access information outside of the application to help fulfill the case. For information about configuring deep links, see Link generator for HR Service Delivery.

Note: For information on how to set up custom actions on record fields, see Set up custom actions on record fields in Workspace.

Lists in Agent Workspace for HR Case Management

Lists are an easy way of accessing cases under various categories. For example, you can quickly get a list of HR cases in lifecycle events or cases related to payroll.

The default **Lists** show HR cases categorized into the following:

HR case lists

Type of lists	Description
All HR Cases	The following categories of HR cases are displayed: • **Assigned to me**: List of cases assigned to you. • **Collaborations**: List of cases with active collaborations. • **Open**: List of all open cases. • **Open - unassigned**: List of all unassigned open cases. • **Closed**: List of all closed cases. • **Recently updated**: List of cases updated by an agent or employee other than the Assigned to agent. • **Case SLAs**: Service level agreement details of HR cases.
Manual	A simple fulfillment type with no associated configurations. For example, for a medical benefits inquiry, the HR agent would fulfill the employee's request by answering the employee's question.
Service Activity	Service activities fulfill the HR service. In the **Service Activities** section at the bottom of

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HR case lists (continued)

Type of lists	Description
	the HR Service form, add one or more service activities to fulfill the HR service. **Note:** Service activities can be approvals, tasks, or child HR services. See Configure a service activity for an HR service for more information.
Lifecycle Events	HR cases fulfilled by lifecycle events. For more information, see Lifecycle event cases in Agent Workspace for HR Case Management.
Other	Hr cases in the following categories: • HRIT cases • Payroll cases • Talent management cases • Total rewards cases • Workforce administration cases • Employee relations cases
HR Tasks	All Hr tasks in Open, Closed, Assigned to me or Open - unassigned categories. For more information, see Create a task for a case using Agent Workspace for HR Case Management.
HR Profile	Various types of HR profiles.
Employee Documents	Documents belonging to employees.
Knowledge	Knowledge articles used and published by the HR team.
Reminders	Reminders created by the HR agents. For more information, see Create a reminder in Agent Workspace for HR Case Management.
Delegation	Cases delegated to you or that you have delegated to other HR agents. The Delegation list appears only when you have activated the Granular Delegation (com.glide.granular_service_delegation) plugin.

You can create your own lists to show specific cases that are relevant to you in the **My Lists** tab. Having a custom **My Lists** helps you work faster and efficiently. For more information, see Create My Lists. For general information on using lists, see .

Create My Lists

Use **My Lists** to create a custom list of HR cases that you can readily access and start working on.

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Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Click the **Lists** icon ().
3. Click **My Lists**.
4. Click **Add new list**.
5. Click **Start from existing** or **Create your own**.
   Clicking **Start from existing** provides existing HR case lists you can select to create a custom **My Lists**. Clicking **Create your own** provides you with a list of all tables you can create a list from.
6. Select how you want to create your **My List** and fill in the fields.

Start from existing

Field	Description
List	Select the HR case categories that you want to base your **My Lists** on.
List Name	Fills in based on what you select from **List**. You can change the name by typing over what displays.
Select columns	The columns are pre-display for you. Click the**X** to delete columns you don't want to appear.
Add filters	Add filters to further define what cases appear in your **My Lists**. **Note:** Criteria pre-fills based on what you selected in the **List**. You can edit, add, or delete the defaults.

Create your own

Field	Description
List name	The name that identifies your **My Lists**. Enter a name for your list.
Select Source	The table that your **My Lists** is based on. Enter letters or the name of the table to start a search, then select q table.
Select columns	The columns you want to appear in your **My Lists**.

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Field	Description
	A list of columns appears based on the table you selected. Click the**X** to delete columns you don't want to appear.
Add filters	Add filters to further define what cases appear in your **My Lists**. **Note:** Criteria pre-fills based on what you selected in the **List**. You can edit, add, or delete the defaults.

7. Click **Create**.

Result
A new list is created for you. Change the order of your lists using the **Reorder** button. For more information, see . You can also use this keyboard shortcut **Ctrl + Shift + Left/Right Arrow** to reorder tabs on lists.

Note: Some users (especially non-admins) may not have access/visibility to the lists in the workspaces. For information on troubleshooting, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1325208.

Create a case in Agent Workspace for HR Case Management

Create a new HR case in Agent Workspace for HR Case Management.

Before you begin
Role required: sn_hr_core.case_writer

Procedure
1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. To create an HR case, select the **Add** icon (plus sign).
3. In the search field, enter a name, partial name, or case number.

   Searching for an employee helps to verify that you are creating a case for the correct person.

   Note:
   - You can search for or create cases for inactive users in Agent Workspace for HR Case Management.
   - If your company uses **Employee Relations**, you can select the **Skip verification** link to create an ER case without identifying an Opened for person. For more information on Employee Relations, see Create an Employee Relations case in Core UI.

4. Select **Next**.
5. On the form, fill in the fields.
   For more information, see Create a new case form.
6. Select **Create case**.

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If the case being created has the same subject person, HR service, and if the case is created within three days (configurable from HR Administration/Properties), a warning appears that a similar case might already exist. You can choose to **Create new case** or **Cancel**.

Note: For information on the sn_hr_core.duplicate_hr_case_time_out property, see HR properties.

Enhance search criteria

Narrow the search criteria by specifying the column against which you want users to be searched. When an HR agent searches for a user while creating a case, provide more accurate search results.

Before you begin
Role required: admin

Procedure

1. Navigate to **HR Administration** > **Case Creation Configuration**.
2. Enable the **Force partial search** option.
3. In priority table name, select a table.
4. In priority column, select a column on which you want to apply the search first.
   For example, assume you have select last name in priority column. When an HR agent searches for an employee, search is first performed on the last name and then on the other columns.

Create a task for a case using Agent Workspace for HR Case Management

Choose a task type when creating a task within a case. When assigning the task to an employee on Employee Center, you can also request how the employee acknowledges completion of that task.

Before you begin
Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management** and select a case you want to add a task to.
2. From the Child tabs above the Case details section, select the **HR Tasks** tab.
3. Select **New**.
4. Select an **HR task type**.

   The different task types you can select are:

HR task types

Task type	Description
HR Service:	An HR service fulfills the HR task. In the **HR Service** field, select an HR service.

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Task type	Description
	Note: **Bulk Parent Case** only appears as a selection when creating a parent case for child bulk cases. Refer to Create a bulk case request.
Submit Catalog Item:	A catalog item fulfills the HR task. In the **Catalog Item** field, select a catalog item.
Submit Order Guide:	An order guide fulfills the HR task. In the **Order Guide** field, select an order guide.
Collect Employee Input:	Collects information from employees. In the **Employee form** field, select the employee form that the user fills out or verifies. **Note:** Employee forms are questionnaires built using the survey designer to collect information from employees. See Collect employee input for more information.
Checklist:	In the **Checklist Items** field, provide the checklist items. Checklists are instructions or steps on how to complete the task. **Note:** For more information, see Using checklists in HR Service Delivery Agent Workspace.
Credential:	Indicates that you want the user to acknowledge reading a document by logging in with their login credentials. The **Acknowledgment text** and **Acknowledgment document** fields appear. Using these fields shows a check box and text above the login credentials. In the Acknowledgment document field, select a document you want the user to read. **Note:** This option is only available for existing customers that have not yet migrated to e-signature. For more information, see Migrate existing HR task templates and open HR tasks to e-signature.
E-signature:	User electronically signs a document. In the **E-signature template** field, select the e-signature template to use.

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Task type	Description
	Note: ○ E-signature is a scoped application that enables you to sign managed documents, knowledge articles, or HR document templates. You can type or draw your signature, credentials, or acknowledgment. For more information, see HR e-signature. ○ If HR document template has a document type of e-signature template, select the HR document template that the signatory signs on the HR case form. For more information, see Select an HR document template for an e-signature task.
Mark When Complete:	Notify the user a **Completed** button appears on the HR Service Portal. Use the **Short description** to provide details about this task. **Note:** **Mark When Complete** changes the state of the task to **Closed Complete**.
Sign Document:	Requests the user to sign a document. An example is sending an education agreement for signature on a tuition reimbursement. The **Acknowledgment text** field appears. Using this field shows a check box and text above the signature. **Note:** ○ This option is only available for existing customers that have not yet migrated to e-signature. For more information see Migrate existing HR task templates and open HR tasks to e-signature. ○ After the user signs the document, the document generates with the signature and attaches to the task. The task closes and the document is attached to the case.
Schedule a meeting	Enables you to create a meeting invite for an employee while you are working on an HR case. For example, you can schedule a meeting with a new hire as part of the onboarding process.

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Task type	Description
	○ You can view the available slots of an employee and schedule a meeting. The employee will receive a meeting invite on Microsoft Outlook. ○ You can also send the meeting invite to external attendees. **Note:** For the meeting invite and scheduling capability, you must install the ServiceNow Microsoft Outlook spoke.
Take Survey:	In the **Survey** field, select a survey that the user is assigned to take.
Upload Documents:	Requests the person assigned to the task to upload documents. Examples are receipts, course registration, or transcripts for tuition reimbursement. Use the **Short description** field to provide instructions. **Note:** The task must be in **Ready** or **Work in Progress**.
URL:	The **URL** field appears. Enter a URL link that the user acknowledges when accessed.
View Video:	The **URL** field appears. Requests the person assigned to the task to view a video.

Note: For information on all the fields, see Adding an HR task to an HR case.

5. Select **Save**.

   You can also add a task by selecting **Add Task** from the ··· from **Details**.

Using checklists in HR Service Delivery Agent Workspace

Creating and using checklists on an HR case or task helps you resolve issues faster, more efficiently, and with fewer errors.

The Checklists appears as a tab in the contextual side panel.

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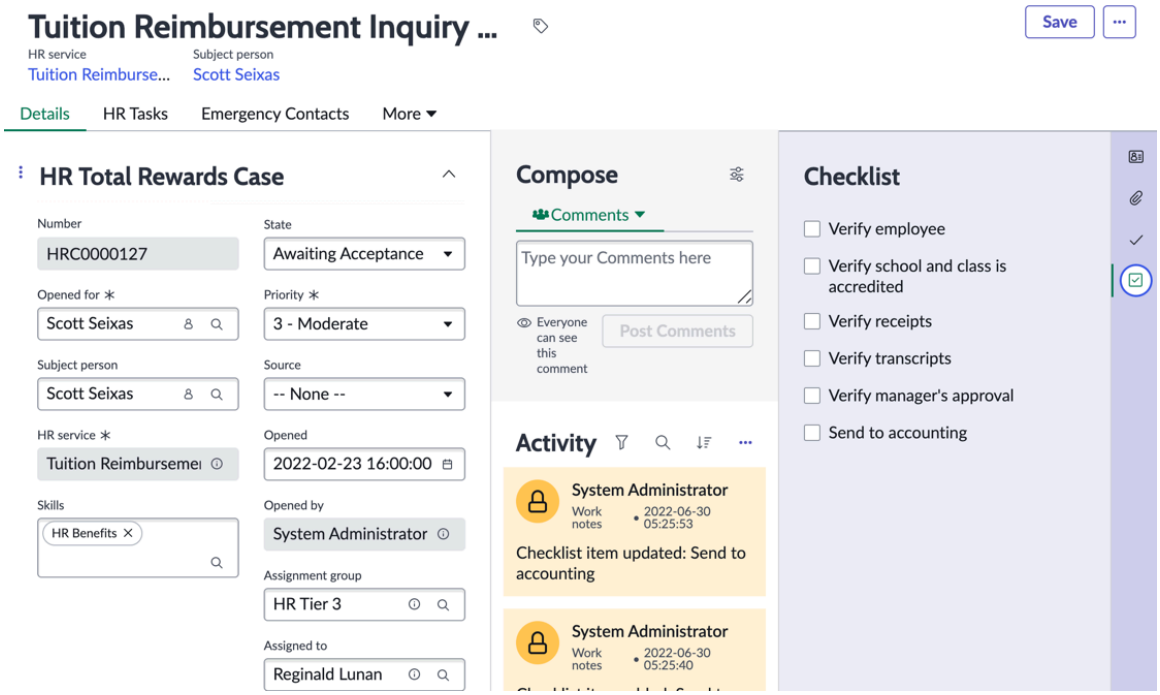
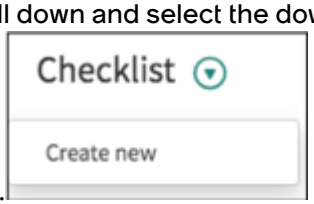


When the configuration for an HR service or HR task template has checklists, they automatically appear. Having a checklist for an HR service or HR task template ensures consistency when resolving issues. For information on configuring checklists, see Configure an HR service and Configure an HR task template.

Creating a checklist directly into an HR case

To create a one-time checklist directly into an HR case, create the case in HR Service Delivery Agent Workspace.

- Go to the platform HR Case Management and open the case you created.
- Scroll down and select the down arrow and select **Create New**.



- Enter instructions.

Creating a checklist directly into an HR Task

Create an HR task with **Checklist** for the **HR Task Type**. See .

Go to the legacy HR Case Management and open the task you created.

From the **Fulfillment Instructions** tab, create your checklist.

Note: These types of checklists are a one-time use and only appears for the specific case or task.

Agent Workspace for HR Case Management contextual side panel

The contextual side panel in Agent Workspace for HR Case Management provides information designed to help you work an HR case and interact with your employees.

The contextual side panel provides a column of icons that provides you with information. Use the information when you interact with your employees or to complete the case.

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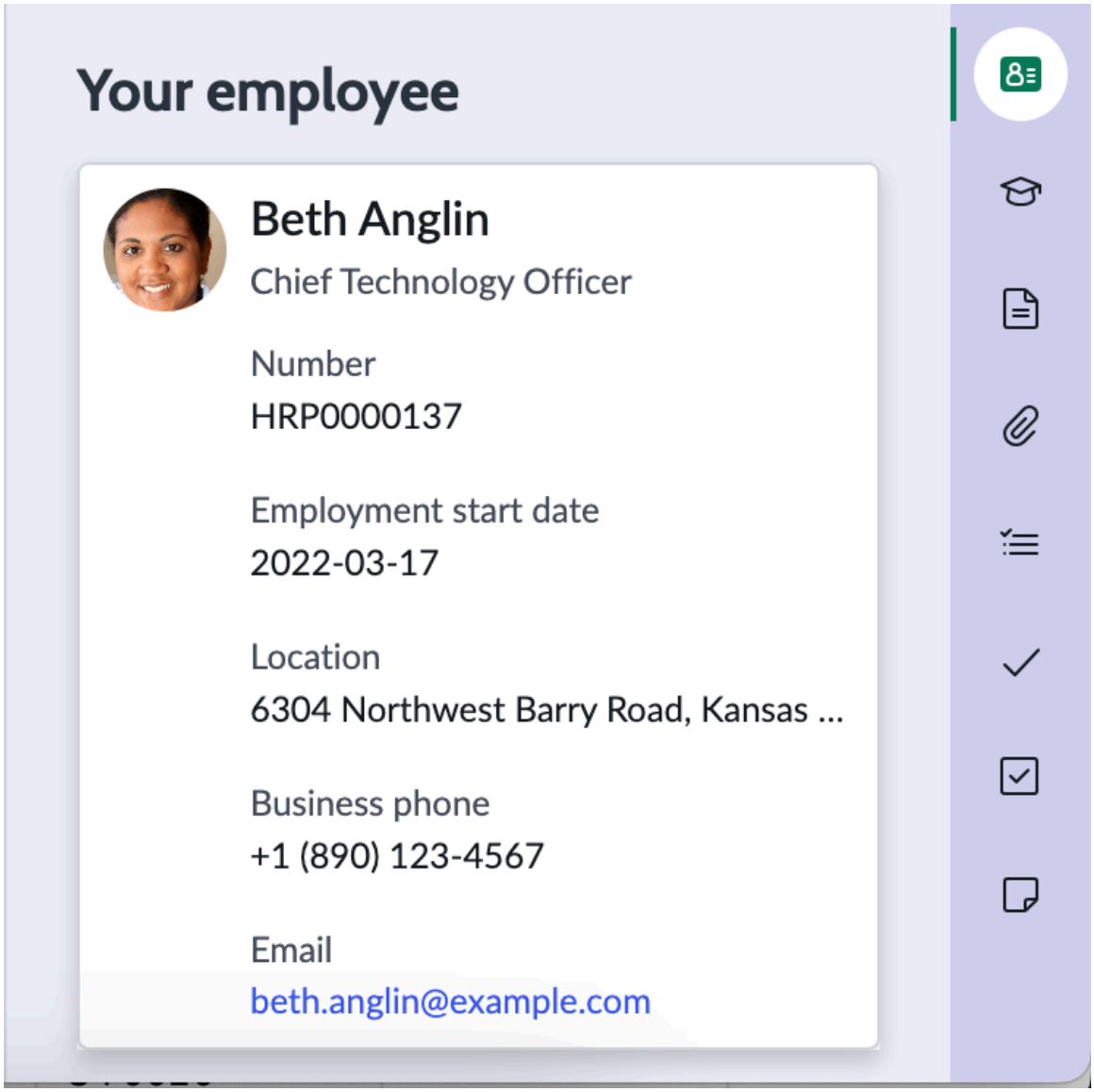

The icons that appear depend on the type of HR case you are looking at.

Agent Workspace contextual side panel icon descriptions

Icon	Description
	At a Glance: Provides key HR profile details for fast recall. Having this information readily available helps agents understand who they are trying to help when communicating with an employee.
	Agent Assist: Provides relevant knowledge articles about the case. You can also provide comments (visible to employee) or work notes (not visible to employee) or view all activities related to the case. **Note:** Agent Assist is also available for HR interactions.
	Employee Documents: Lists documents related to the case you are on. Select the document and you can download it or rename it.

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Agent Workspace contextual side panel icon descriptions (continued)

Icon	Description
	Note: The Contextual side panel requires the Employee Document Management [com.sn_employee_document_management] plugin to display the employee documents. For more information, see Employee Document Management.
	Attachments: Documents relevant or related to the HR case are displayed as attachments. These documents can be moved to Employee Document Management (EDM) for archival and historical purposes. For example, receipts for tuition reimbursement are attachments to an HR case. After you move attachments to Employee Document Management, they will be employee documents. See . • To add attachments to a case, click **Select File**. • To download all attachments at one time, select and select **Download all**. • To download only a specific attachment, select a specific attachment, select , and select **Download**. • To delete all attachments at one time, select and select **Delete all**. • To delete only a specific attachment, select a specific attachment, select , and select **Delete**. **Note:** A small green dot indicates there are attachments .
	Templates: Displays reusable templates that you can use to auto-fill certain fields of a case. Select the required template so that the template values are auto-populated on the case.
	Response Templates: Displays reusable messages that you can use when responding to an employee that has a question about their case. Copy the text from the response template you want to use and paste the text into the Comments or Work notes section of the HR case. An HR service configures response templates and are a fast, consistent, and efficient way to respond to common questions related to HR cases. For more information, see Response templates for HR Service Delivery.
	Fulfillment Instructions: Provides you with focused and targeted information on how to complete an HR case faster and more efficiently. Can include specific instructions, KB articles, or a checklist of what to do on the case.

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Agent Workspace contextual side panel icon descriptions (continued)

Icon	Description
	For more information, see HR fulfillment instructions.
	Checklist: Provides you with a list of things that need to be checked or done. Checklist helps you in resolving an issue efficiently and in a quicker way. For more information, see Using checklists in HR Service Delivery Agent Workspace.
	Use personal notes to add information that is not finalized and must not be tracked within the case history. For more information, see Add personal notes

Using At a Glance in Agent Workspace for HR Case Management

Use the **At a Glance** feature from the contextual side panel to quickly view HR profile information for the **Opened for person** on an HR case enabling HR agents to better assist and resolve employee requests.

The At a Glance panel displays key HR profile details about the employee, such as the employee's job title, employment start date, office location, contact information, and organizational details. Agents can quickly access this information so that they have a better understanding of the employees they are trying to help.

HR profile

What appears under **Your Employee** section depends on what you configure on the HR profile. You can open any HR profile and edit the fields you want to be displayed by adding or removing them. The fields you selected appear for all HR profiles, but fields with data are only displayed in the **Your Employee** section. For more information, see Configure the At a Glance panel.

Note: If the subject person on an HR case does not have an HR profile record, the At a Glance icon does not appear in the contextual side panel.

If you change the subject person, the profile information of that person will also be immediately updated in the **Your Employee** section, enabling you to verify the right person even before saving the change.

For more information, see HR profile editable field configuration.

Configure the At a Glance panel

Customize which employee information appears in the At a Glance panel by adding or removing fields from the Employee Details and Contacts sections.

Before you begin

Role required: sn_hr_core.admin

About this task

The At a Glance panel provides HR agents with quick access to essential employee information without opening the full profile. This panel appears in the HR Agent Workspace and displays key details from the Employee Details and Contacts sections.

You can customize which fields appear in the panel to match your organization's workflow needs.

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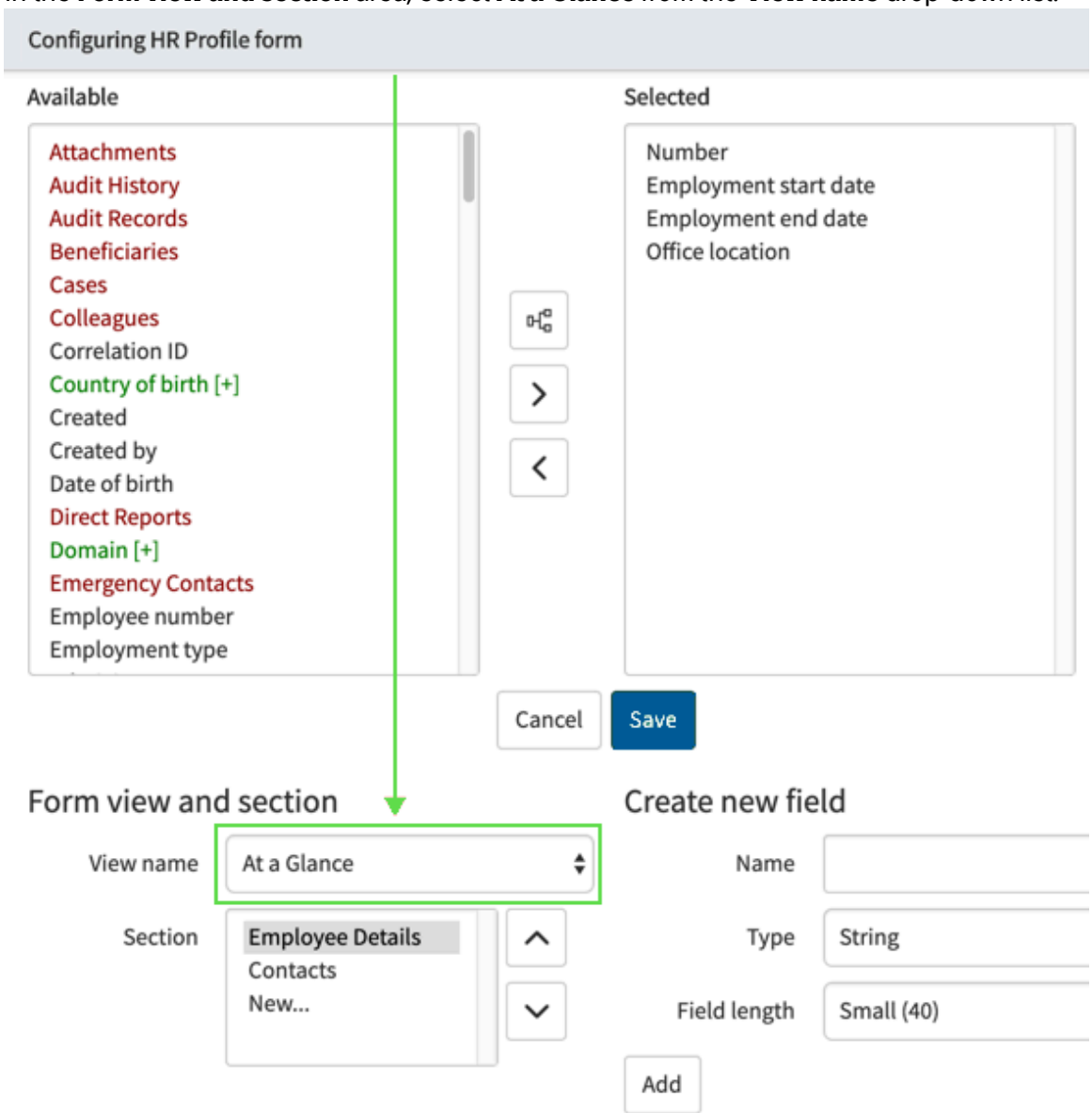
Note: The At a Glance panel replaces the Customer 360 ribbon component in newer releases.

Procedure

1. Navigate to **All** > **HR Profile** > **HR Profiles**.
2. Open any HR profile record to access the form configuration.
   You can use any profile record since the configuration applies to all profiles using the same form view.
3. Access the form configuration by right-clicking the form header and selecting **Configure** > **Form Layout**.
4. In the **Form view and section** area, select **At a Glance** from the **View name** drop-down list.



   The form layout displays the current At a Glance configuration with available sections.
5. Configure the Employee Details section by selecting or clearing the check boxes for fields you want to include or exclude.
   Common Employee Details fields include name, employee ID, department, manager, and job title. Select only the fields that agents need for quick reference.
6. Configure the Contacts section by selecting or clearing the check boxes for contact fields you want to include or exclude.

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Contact fields typically include phone numbers, email addresses, and emergency contact information. Consider which contact methods agents use most frequently.

7. Select **Save** to apply your configuration changes.
   Your configuration changes are saved and applied.

Result

The customized At a Glance panel now displays your selected fields when agents view employee profiles. Fields without data for a specific employee do not appear in that employee's panel, keeping the display clean and relevant.

Using checklists in Agent Workspace for HR Case Management

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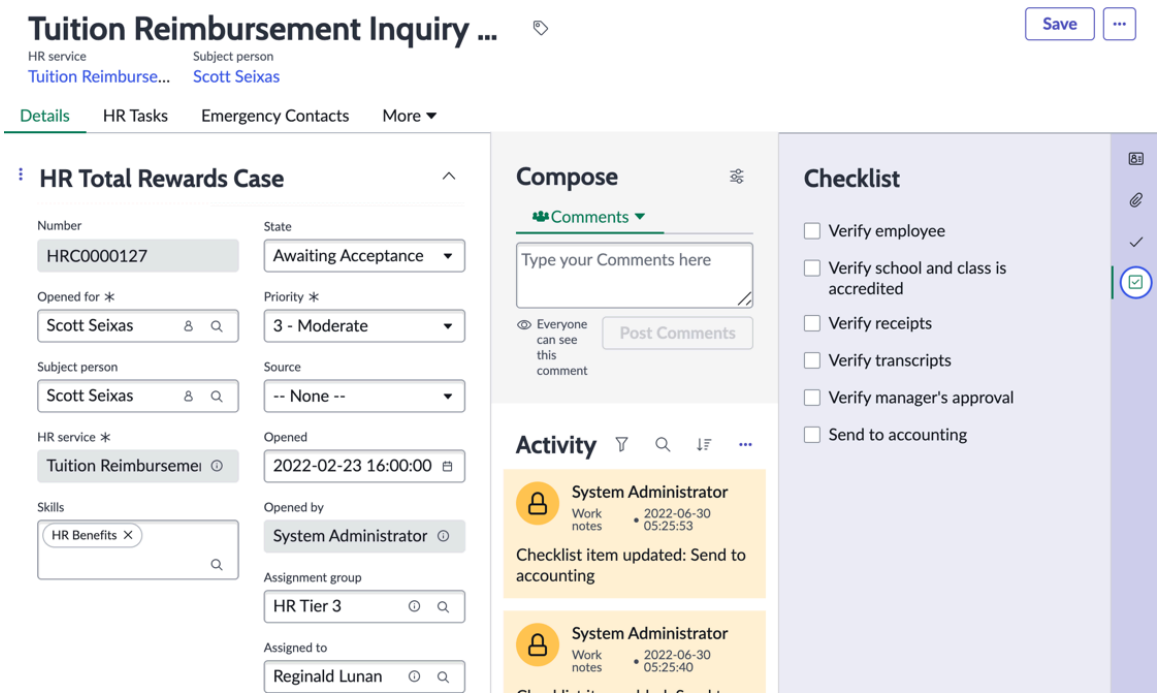
The Checklists appears as a tab in the contextual side panel.



When the configuration for an HR service or HR task template has checklists, they automatically appear. Having a checklist for an HR service or HR task template ensures consistency when resolving issues. For information on configuring checklists, see Configure an HR service and Configure an HR task template.

Creating a checklist directly into an HR case

To create a checklist directly into an HR case, select **Checklists**.

1. Click **Add item**.
   a. In **Checkbox text**, add instructions.
   b. Select **Add link** to add link text and link.
   c. Select **Apply** and **Save**.
2. To rename a checklist item, select **Edit**. Make the required changes and select **Save**.
3. To reorder a checklist item, select **Edit**.

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a. Select **Reorder item** .

b. Drag and place the item at the required position.

c. Select **Save**.

4. To delete a checklist item, select **Remove item** .

Creating a checklist directly into an HR Task

Create an HR task with **Checklist** for the **HR Task Type**. See .

Go to the legacy HR Case Management and open the task you created.

From the **Fulfillment Instructions** tab, create your checklist.

Note: These types of checklists are a one-time use and only appears for the specific case or task.

Response templates in Agent Workspace for HR Case Management

Response templates provide you with information on resolving an HR case or HR task or how to help an employee making an inquiry.

Response templates help you to be efficient and consistent when working on similar HR cases.

Response templates provide reusable messages. Copy and paste these messages into an email, chat, comments, work notes, or use as talking points when on the phone.

Response template channels

Response template channels segregate your response templates into media categories. You may want responses to have slightly different text in a chat response compared to an email response. Or, you don't want a specific template to appear for chat. The base system provides the following channels:

- Chat
- Email
- Form

Note: Form provides text you can use in the comments or work notes on an HR case.

For more information on setting up a response template channel, see Create a response template channel.

For more information on setting up response templates, see Response templates for HR Service Delivery.

Using a Response template in an HR case or HR task record

Use response templates as reusable messages that you can copy and paste into the comments or work notes for an HR case or task.

Before you begin
Role required: sn_hr_core.case_writer

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Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. Select an HR case or task.

Item	Steps
HR case	**a.** Select **All HR cases** > **Assigned to me**. **b.** Select the HR case.
HR task	**a.** Select **HR tasks** > **Assigned to me**. **b.** Select the HR task.

4. From the contextual side panel, select the Response templates icon ( ).
5. Select the View response templates icon ( ) to display templates based on the language preference of the selected user.
   For example, only response templates in the French language are displayed to the **assigned to** user because French has been selected in the **Language** field in the user profile of **assigned to**.
6. Select the response template.
7. Select the **Copy to clipboard** button and paste the text in the **Comments/Worknotes** area.
8. Select **Post Comments**.
   The reused message is visible under the **Comments/Worknotes** section to the subject person.

Using a Response template in chat

Use response templates as reusable messages that you can copy and paste into a chat.

Before you begin

Role required: sn_hr_core.case_writer

The Advanced Work Assignment for HRSD (com.sn_hr_awa) plugin must be activated to use response templates in chat. For more information, see Response templates for HR Service Delivery.

Note: Currently, chat is only available for Interactions in Agent Workspace for HR Case Management.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Ensure your **Inbox** status is set to **Available**.
3. When a chat routes to you, select Accept.
4. An interaction record automatically creates and you can start chatting with the employee.
   To display response templates, enter /r in the chat area and a list of response templates appear.
5. Select the response template and the text appears in the chat window.
6. Select the Send button to transmit the message.

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Using a Response template in an email

Use response templates as reusable messages that you can copy and paste into an email.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. From the **Details** tab of an HR case, select the **More Actions** button then select **Compose Email**.
2. From the New Email Draft tab, click the Response Templates icon ( ).
3. Open the response template, copy, and paste the text into the body of the email.
   The **To** field is automatically populated with the email address of the Subject person. However, you can change the email address to send the email to a different person.
4. Click **Send Email**.

Add personal notes

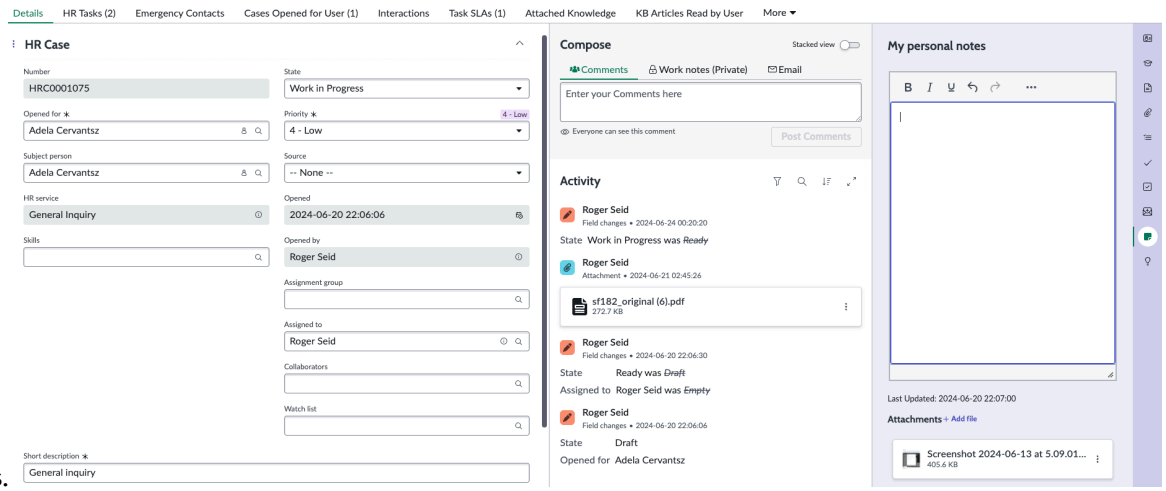
Personal notes allow agents to record information that remains private and is not visible to other agents working on that case.

Before you begin

Role required: sn_hr_core.case_writer

About this task

Unlike working notes, which are accessible to all agents assigned to a case, personal notes provide a secure way to document sensitive information that shouldn't be shared with the broader team. For example, when managing Employee Relations cases, agents can use personal notes to document confidential details.



Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. Select an HR case.
4. In the Contextual Side Panel, select the **Personal Notes** icon( ).
   The case must be in ready, work in progress, or awaiting acceptance state.

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5. Enter your notes.
6. **Optional:** Select **+Add file** to add an attachment.

Use recommended actions

Provides real-time, actionable guidance, and relevant resources that help HR agents speed up case resolution.

Before you begin

Role required: sn_hr_core.admin or sn_hr_core.case_writer

About this task

Note: If there are any existing guided decisions, add those decisions within the HR case context in Recommended Actions for HRSD.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the Lists icon ().
3. Select an HR case.
4. In Contextual Side Panel, select the Recommendations icon ( ).
5. Review similar cases, relevant KB articles, and suggested actions in the context of the current case.

Option	Description
Similar cases	Use the View case option to review the full de tails of the case.
KB search	Use the following options as needed: Attach and add link in comment, Read article, Attach and add link in email, Add link in worknote, and Copy link.
Suggested actions	Use the Create an HR approval option to add an approval to the case as needed.

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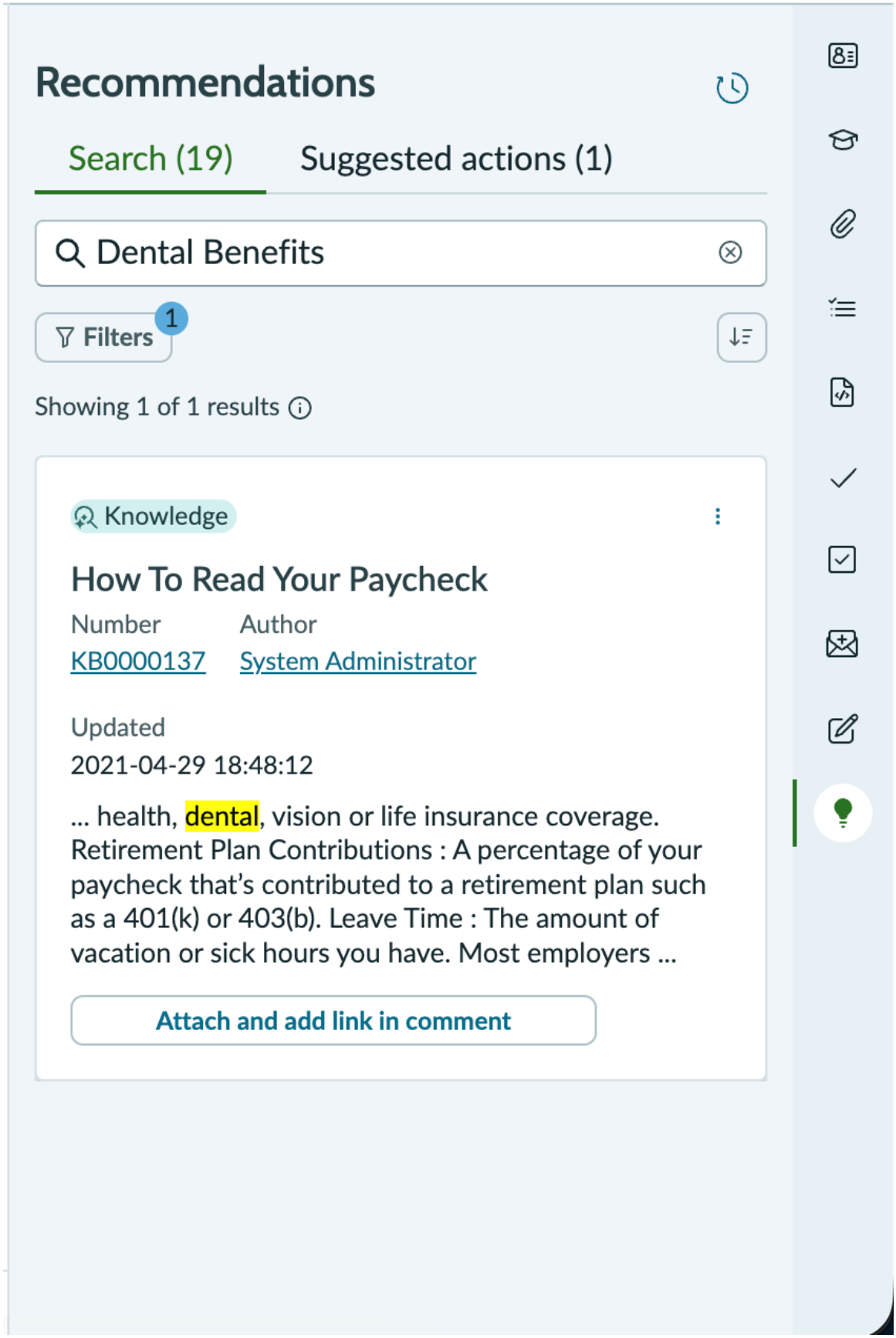

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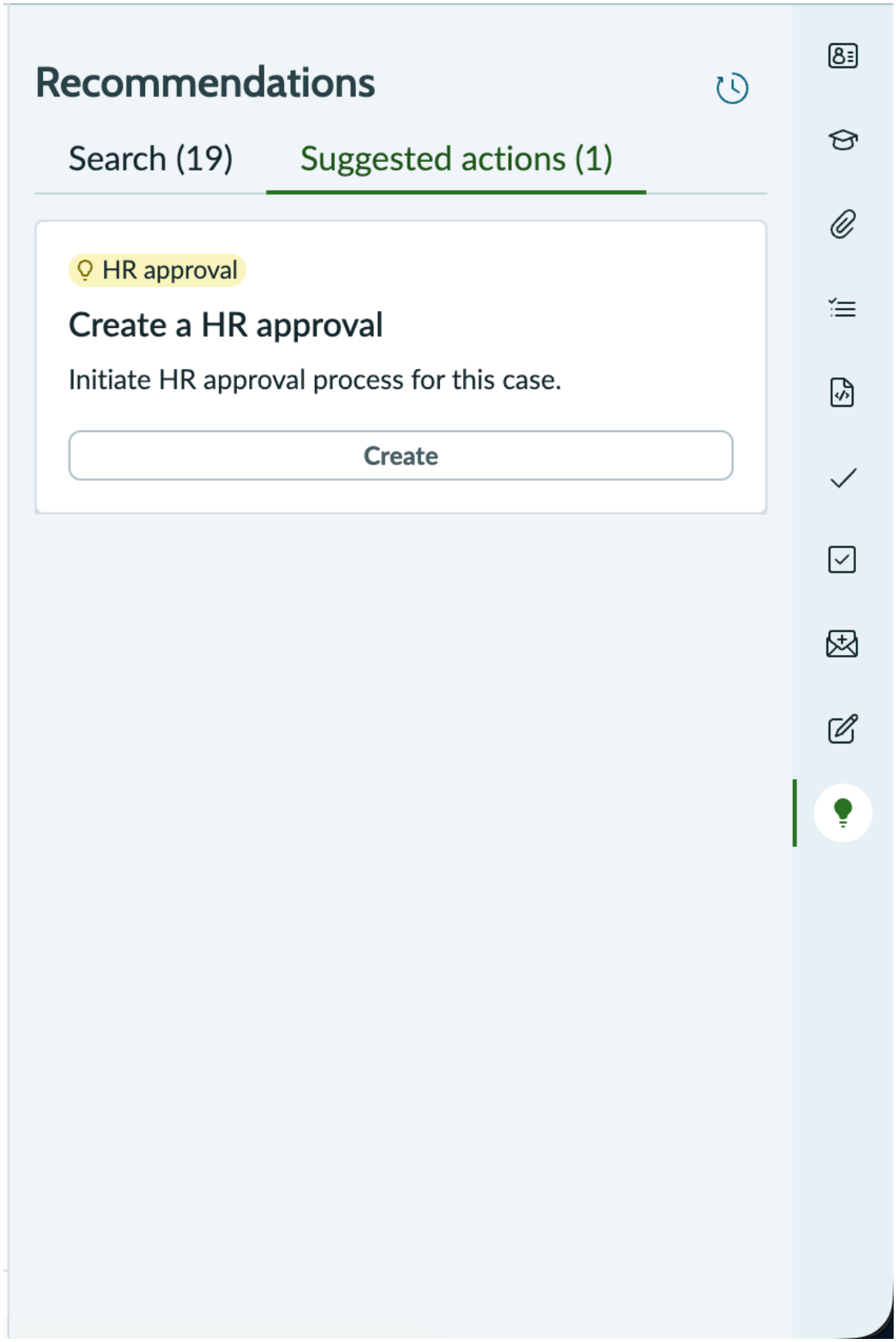

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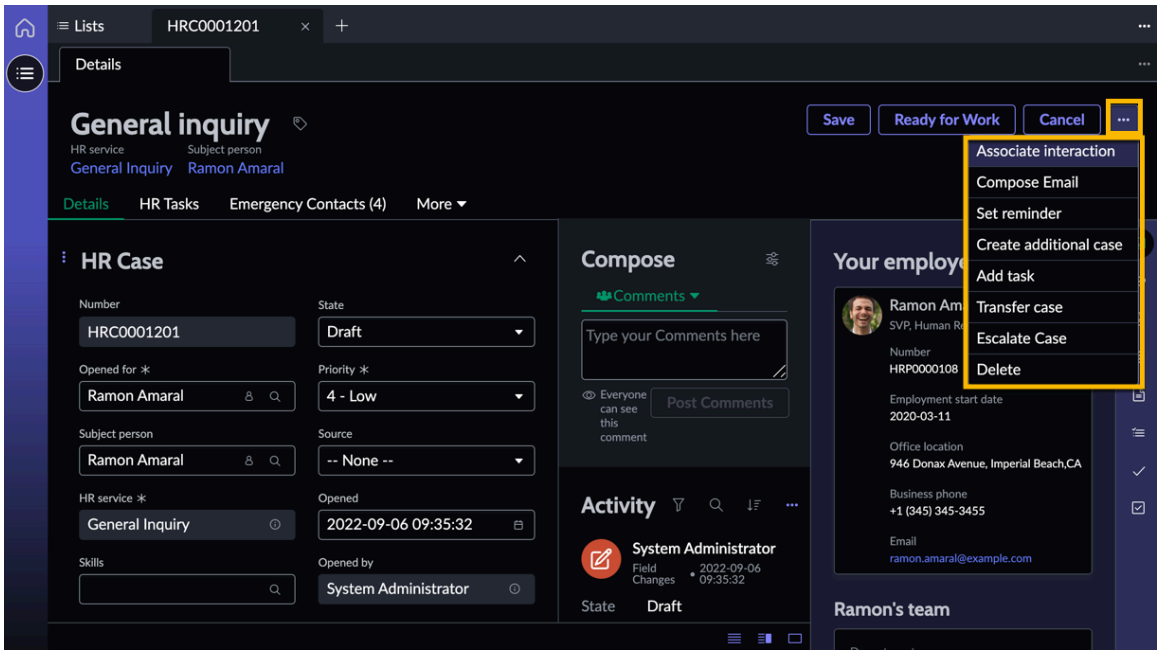
Using the More icon in Agent Workspace for HR Case Management

You can use the ... more icon from Agent Workspace for HR Case Management to perform many duties related to working on an HR case.

More icon is displayed at the top right corner of the Details tab when working on a case.



From here, you can:

- Associate interaction: Associate the displayed case with an interaction. For more information, see .
- Compose Email: Send an email from an HR case. The **New Email Draft** tab opens to compose and send the email. The **To** field is automatically updated with the Subject person's email ID. Agent can retain the email or add a new email. For more information, see Sending an email in Agent Workspace for HR Case Management.
- Set reminder: Create a reminder to ensure followup by a specific date. For more information, see Create a reminder in Agent Workspace for HR Case Management.
- Create additional case: Create another HR case without leaving the case you are viewing or working on. For more information, see Creating a case from an HR case.
- Add task: Add an HR task to the case. For more information, see Create a task for a case using Agent Workspace for HR Case Management.
- Transfer case: Reclassify a case for another HR service. For more information, see Transfer a case in Agent Workspace for HR Case Management.
- Escalate case: Assign important cases to another tier or agent with more expertise. For more information, see Escalating a case in Agent Workspace for HR Case Management.
- Delete: Delete the case you are working on.

Create a reminder in Agent Workspace for HR Case Management

You can create reminders from an HR case or task to receive an intimation which will allow you to follow up by a specific date. Reminders enable timely communication and make sure that the actions are taken.

Before you begin

Role required: sn_hr_core.case_writer

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Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Find the case you for which you want to add a reminder.
   For more information on finding an HR case, see Using Agent Workspace for HR Case Management.
3. Select the ••• more icon.
4. Select **Set reminder**.
5. Fill in the fields.

Create New Reminder

Field	Description
Short description	Text that describes the reminder.
Date time	The date and time on which you want to receive the reminder.
Task	The task or case associated with the reminder. Automatically appears based on the case or task you have displayed when creating the reminder.
User	The name of the logged in user that created the reminder.
Reminder	Status of the reminder.

6. Click **Save**.
   You can view your reminders from the HR case list, by scrolling down and selecting **Reminders**.

Note:

- When alert is activated, a number appears inside the Notifications icon () and the notifications message scrolls across the screen to remind you.
- Reminder notifications appear only to the user who has set the reminders.

Creating a case from an HR case

Create additional cases directly from the HR case you are working on in the Agent Workspace for HR Case Management.

Before you begin

Role required: sn_hr_core.case_writer

A convenient and time saving feature of Agent Workspace for HR Case Management is having everything you need as an HR agent in one place.

To create a case, you don't have to leave a case you are working on and try to find it later. Create another HR case from:

- an HR case you are viewing.
- an HR profile that displays on the case you are viewing.

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Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select a case from which you want to create additional case.
3. Click the  icon at the top right hand corner of the Details tab.
4. Select **Create Additional Case**.
5. In the new tab, search by name or case number to verify the employee requesting this case.
6. Click **Next**.
7. Enter the details like COE, HR Service and Opened for.
8. Click **Create case**.

Transfer a case in Agent Workspace for HR Case Management

Many cases are created as a General Inquiry case. After researching the employee's needs, you can transfer an existing case to a different HR service.

Before you begin

Role required: sn_hr_core.case_writer
For information on configuring HR case transfer or classification properties, see Transfer an HR case.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Find the case you want to transfer.
   For more information on finding an HR case, see Using Agent Workspace for HR Case Management.
3. Select the more icon.
4. Select **Transfer case**.
5. Select one of the two options from **Transfer type**.
   - **Transfer with existing case number**: The HR case number does not change, links are redirected to the new case, and work notes is transferred to the new case.
   - **Transfer to a new case number**: The HR case number changes, links are not redirected, and work notes is not transferred. Both HR case numbers appear on the HR case for reference. The original case state is changed to **Closed Complete** and is canceled.
6. Select an appropriate COE.
7. From **New HR Service**, select the HR service you want to assign to your case.
8. Click **OK**.

When you transfer an HR case from one HR service to another, some field values are not transferred to the new case. The current case and its child tasks are closed.

Note: Priority is transferred from the original case and does not override the HR template for the new HR case.

The subject person receives a notification email with the closed case and transferred case information. Replies to the email appear in the Comments section of the HR case. If the subject person replies to the email associated with the closed case, the reply appears in the comments for both the closed and transferred cases.

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Note: If the sn_hr_core.restrict_guest_email system property is False, text from an email appears in the Work notes field when the employee is responding from a personal email account. False is the default property.

See Email setup.

Copy a case in Agent Workspace for HR Case Management

Create a copy of a case to auto-populate the case values without having to fill in the fields manually.

Before you begin
Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select a case from which you want to create a copy.
3. Select the ··· icon at the top right-hand corner of the **Details** tab.
4. Select **Copy case**.
   - A copy of the case is created in **Draft** state.The activity stream displays information about the previous case from which this case is created.
   - By default, opened_for, subject_person, hr_service, skills, priority, assignment_group, assigned_to, and short_description, are copied to the new case. You can configure the fields that you want to copy to the new case in the Copy case attributes setting in Page configurations.

Escalating a case in Agent Workspace for HR Case Management

Escalate an HR case when you are unable to resolve an issue and must amplify the importance of a case.

Before you begin
Role required: sn_hr_core.case_writer

The matching rules you have implemented will determine the group and agent the case is escalated to. For more information, see Assignment and matching rules in HR and Configure escalation rules for HR cases.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Find the case you want to transfer.
   For more information on finding an HR case, see Using Agent Workspace for HR Case Management.
3. Select the ··· more icon.
4. Select **Escalate Case**.
5. In the Work notes, enter a reason for escalating the case.
6. Click **OK**.
   The form refreshes and is now assigned to the next tier assignment group.

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Secure documents

Add an extra layer of security on documents that are linked to a case. Grant access to documents with sensitive or private data to groups, users, user criteria or roles.

Before you begin

Role required: sn_hr_core.case_writer

Note: Ensure that the Document Management [com.snc.platform_document_management] plugin is installed.

Procedure

1. Navigate to **All** > **Agent Workspace for HR Case Management**.
2. From Lists, select an HR case.
3. Navigate to **More** > **Documents**.
4. Select the required document.
5. Review the following tabs to perform the necessary actions.

Document tab descriptions

Tab	Steps
Details	Change the access settings from **By referenced** records to **Sharing Permissions**. **Note:** This is a mandatory step.
Role Permissions	To grant access to a document based on a role: **a.** Click **New**. The Role Permissions modal opens. **b.** In the **Permission** list, select **Reader** or **Writer**. **c.** In the **User Role** field, select a value. **d.** Click **Save**.
User Criteria Permissions	To grant access to a document based on user criteria: **a.** Click **New**. The User Criteria Permissions modal opens. **b.** In the **Permission** list, select **Reader** or **Writer**. **c.** In the **User Criteria** field, select a value. **d.** Click **Save**.
User Permissions	To grant access to a document based on user permissions: **a.** Click **More**. **b.** Select **User Permissions**. **c.** Click **New**. The User Permissions modal opens. **d.** In the **Permission** list, select **Reader** or **Writer**. **e.** In the **User** field, select a value. **f.** Click **Save**.
Group Permissions	To grant access to a document based on group permissions:

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Tab	Steps
	a. Click **More**. **b.** Select **Group Permissions**. **c.** Click **New**. The Group Permissions modal opens. **d.** In the **Permission** list, select **Reader** or **Writer**. **e.** In the **User Group** field, select a value. **f.** Click **Save**.

Report a knowledge gap from a case in Agent Workspace for HR Case Management

Report a knowledge gap for a case to get a documented resolution for common HR cases.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. Select an HR case.
4. Select the More icon and select **Report knowledge gap** from the drop-down list.
5. In the Knowledge feedback task form, enter a description in the **Description** field.
6. Select **Save**.
7. **Optional:** Request notifications of updates to an existing knowledge base article by selecting a knowledge base article from the **Outcome** field.
8. Select **Save**.

Result
A knowledge gap is created and is listed in the **Knowledge Feedback Tasks** related list on the case record page.

View assigned knowledge tasks in Agent Workspace for HR Case Management

View your assigned knowledge tasks in Agent Workspace for HR Case Management when a knowledge gap is reported in a case.

Before you begin
Role required: sn_hr_core.kb_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. Select **My tasks - feedback** under **Knowledge**.
4. Select the knowledge task that you want to work on.

Add adhoc approvers to an HR case in the Agent Workspace for HR Case Management

Provide your agents with the flexibility to add adhoc approvers to a case that is part of an HR service.

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Before you begin

For example, in certain scenarios where in an employee's requests falls outside the bounds of the standard process or the agent needs to take an additional approval, an HR agent might need to request an adhoc approval before proceeding with its fulfillment.

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **Workspace** > **HR Agent Workspace**.
2. Open the case that is assigned to you.
3. Click **More actions** and select **Add an approval**.

Note:

- Administrator must have configured the **Agent Can Add An Approval** option on the HR service to which the HR case is associated.
- This option appears only to the **Assigned to** user when the case is in the **Ready** or **Work in progress** state.

4. Fill in the required fields in the **Add an approval** window.

Form fields for adding an approval

Field	Description
Approver users	Users who must approve the request.
Wait for	Conditions that you want to set for the approval flow. ○ **Anyone to approve**: If any one of the approvers approves the request, the approval flow will be complete. ○ **Everyone to approve**: Only if all the approvers approve the request, the approval flow will be complete. ○ **First response from anyone**: The first response of any one approver is taken into consideration. For example, if one of the approvers first rejects the request, the flow will be rejected; if one of the approvers first approves the request, the flow will be approved.
On rejection	Conditions that you want to set when an approver rejects a request, for example, allow resubmission of approvals, or mark it as close incomplete.
Reason	Reason for initiating the approval flow.
Additional Comments	Any other information that you want to share with the approvers.

5. Click **Submit**.

Templates in Agent Workspace for HR Case Management

Create consistent recurring documents by developing templates using Document Templates and use them in a generic workflow in Agent Workspace for HR Case Management.

Use templates for communication letters to employees like verification letters or offer letters. Associating templates with an HR case and moving it to an appropriate working status, like

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Work in progress, retrieves the data from the case and integrates it with the template. For more information on how to configure and use a document template, see Document Templates.

Agents can use templates to generate document tasks and get signoffs from the stakeholders. After all the participants sign the template, the signed document is generated. For more information, see .

Note: Install the Document Templates plugin to use this feature.

Create and sign document tasks in Agent Workspace for HR Case Management

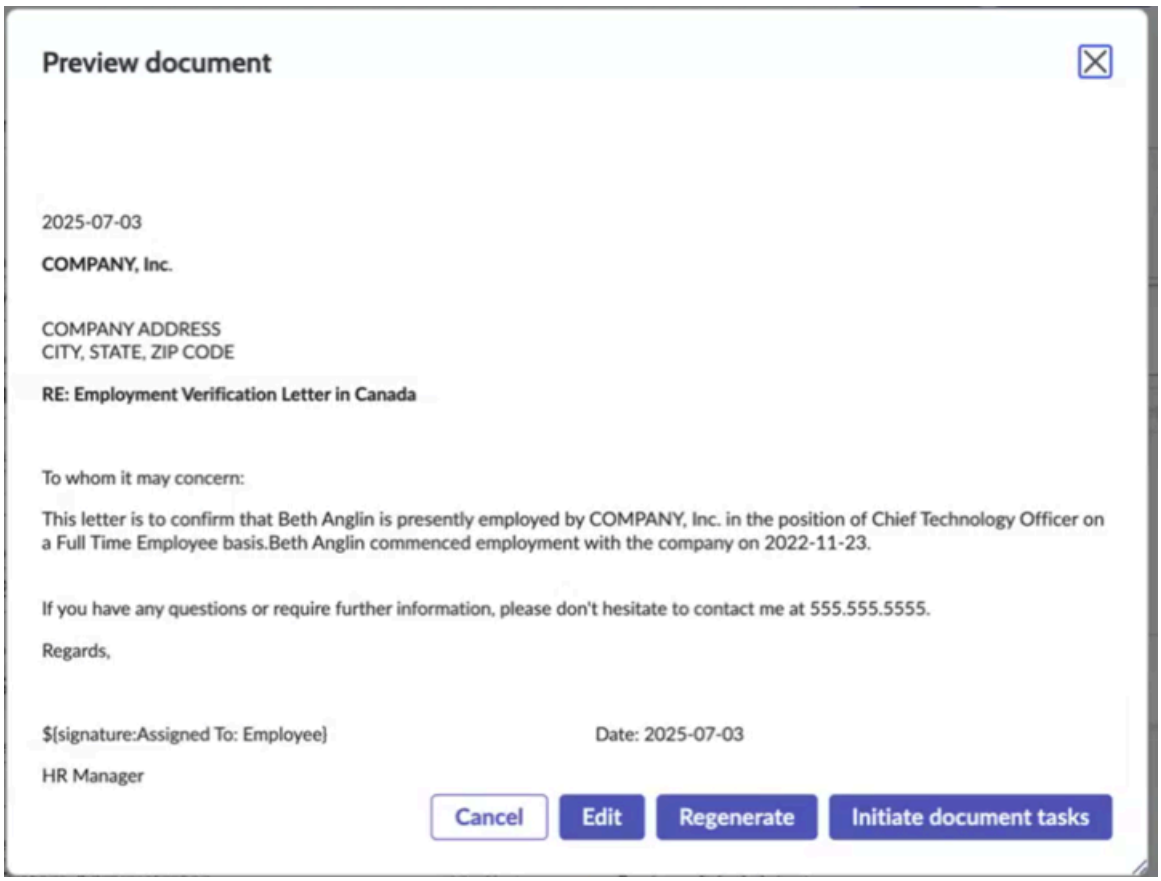
Create document tasks directly in the Agent Workspace for HR Case Management using document templates and sign them off from Agent Workspace.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select an HR case for the document task.
   In the **HR service** field, make sure that an HR service that has document template is selected.
   For more information, see Create a case in Agent Workspace for HR Case Management.
3. Click the **Start Work** button.
4. Select the **Preview document** option.
   The document is displayed with options to cancel, edit, generate, or initiate document tasks.
5. Select the **Initiate document task** button.



For more information, see Document tasks generation in Document Templates.

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Document tasks that are part of the selected HR case are generated and listed in the **Document tasks** tab. The participants will receive document tasks as configured in the template

6. Select a document task that is assigned to you.
7. Select **Sign Document** or **Fill Document** as displayed.

   Note: The **Fill Document** button appears only for PDF document templates.

8. In the dialog box that appears, sign the document (HTML template) or fill the required fields and sign the document (as configured in PDF template).

   Note: If the **Signing type** in the template is Adobe Acrobat Sign or Docusign, on clicking **Sign Document**, you will be redirected to the respective application page for signing the document.

9. Click **Sign** to complete the signing process.
   The status of the document task is automatically set to **Closed**.

Result

After all the documents associated with the case are closed, the document is generated and listed under **Attachments**.

Edit an HTML document

Support rendering values of variables, scripts, and blocks in edit mode in Preview Document. View the content of variables, scripts, or blocks rather than only viewing the variable or block names.

Before you begin

Role required: sn_hr_core.case_writer

Note: This feature is available only when the document is generated from a template in the Document Template plugin.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Click **Lists**.
3. Open an HR case that is assigned to you.
4. Click **Preview Document**.
5. In the Preview Document window:
   a. Click **Edit**. Except for signature tokens, all other variables, scripts and blocks are rendered with their values.
   b. Add text, any valid tokens, or signature tokens.

      Note: Invalid tokens will be removed while saving.

   c. Click **Save**.
   The document is saved and sent as an attachment in document tasks that are created for participants.

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Generate a summary report

Create and save as many templates as needed by using the ServiceNow Document Templates application. Create a summary report by selecting a document template for the report. Export the case details, in a PDF format, for documenting and sharing purposes.

Before you begin

Role required: sn_hr_core.case_writer

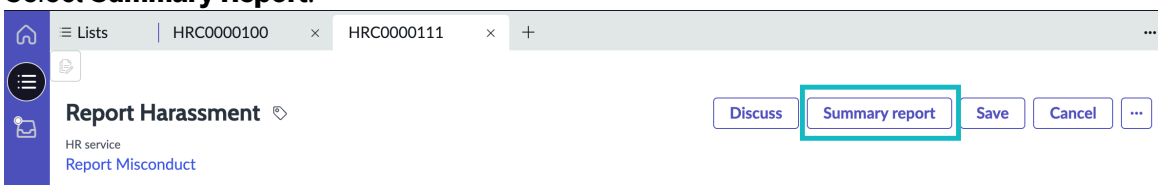
Ensure the following plugins are installed:

- Document Templates [sn_doc]
- Employee Relations [com.sn_hr_employee_relations]

You must be assigned to the case.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for Case Management**.
2. Create an HR case within the Employee Relations COE by selecting the **Add** icon (plus sign). For detailed instructions, see Create a case in Agent Workspace for HR Case Management. An employee relations case is created.
3. Select **Summary Report**.



4. In the Summary Report window, select a predefined document template format in which the case details are captured.
   For details on how to create and use document templates, see Document Templates.
5. Select **Generate**.
   Summary report is generated with case details, including work notes, and added as an attachment to the case.

Sending an email in Agent Workspace for HR Case Management

Send any communication related to HR cases with attached documents using the Send email feature. Minimise typing errors by auto-populating the email address of the subject person (of the case) in the email.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select a case for which you want to send an email.

   Note: If you want to directly send the document in a case as an email, click the **Send Email** button on the case tab.

3. Click the ··· icon at the top right hand corner of the tab.

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- For the **Verification of Employment service** HR service, fill in the **Document template category**, **Document template**, **Subject person** fields.
- For the **Employee Verification Letter** HR service, fill in the **Document type**, **PDF template**, **Subject person** fields.

Click **Preview document**. In the window, click **Generate**. A document is generated and added as an attachment to the case.

4. Select **Compose Email**.
   The New Email Draft opens in another tab.
   The **To** field will be automatically filled with the subject person's email id. However, you can change the recipient of the email.
5. The **Subject** field in the email will be updated with the case title.
6. Compose your email in the space provided.
   You can use Response template for the content on the email.
7. Click **Send Email**.
   An email with the generated document is sent to the intended recipient.

   Click **Save as draft**, if you are not ready to send the email yet.

Send an email notification after reassignment

After you reassign an agent to an HR case, you can send an email to notify the agent.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select a case for which you want to send an email.
3. Select  next to the **Assigned to** field.
4. Select an agent.
5. Click the Open record icon () next to the agent's name.
   The agent's details are opened in a new tab.
6. In the Email field, click the Email icon().
7. Add a **Subject** line and compose the mail in the space provided.
8. Click **Send**.

Using interactions in Agent Workspace for HR Case Management

Use interaction records to create an HR case or reference employee information to decide to create a case or request from different types of employee communications.

An interaction is a request for assistance made through chat, phone, or in person. You can route interactions by skill, group, or directly to an HR agent.

You can also create an interaction for simple requests where you decide you might not want to create an HR case or associated tasks.

Interaction records are automatically created when you are using agent chat.

Note: Agent Assist is available for interactions.

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For more information on interactions, see Interaction records in Agent Workspace.

Create interactions in Agent Workspace for HR Case Management

Create interaction records from the configurable Agent Workspace for HR Case Management form.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. To create an interaction, select the **Add** icon (plus sign), and select **Create Interaction**.
3. Type a name or case number to verify the employee in this interaction, and select **Next**
4. In the details section, enter information about the interaction.

Interaction details fields

Field	Description
Type	The type of communication that initiated the creation of the interaction: ○ None ○ Chat ○ Messaging ○ Phone
Opened for	The employee who the interaction is about.
Short description	A short description about the interaction.
Assigned to	The HR agent responsible for the interaction.
Work notes	Information related to the interaction that can help other HR agents. Work notes are not visible to the Opened for person.

5. Select **Create interaction**.

What to do next

Agents use an interaction to help complete and create tasks and cases.

Interaction record tabs

Tab	Description
Related Tasks	Any tasks or cases opened from the interaction, for example, a new incident or new case.
User's Tasks	Incidents related to the interaction.
User's Interactions	Logs all interactions tied to the employee the interaction is opened for.

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Interaction record tabs (continued)

Tab	Description
Cases opened for "Opened for"	Shows all HR cases related to the Opened for person.

Button

Button	Description
Create HR case	Creates an HR case from the interaction and copies discussions and documents of the interaction to the HR case. The documents of the interaction are displayed in the **Attachments** section of the case record.

Lifecycle event cases in Agent Workspace for HR Case Management

Manage lifecycle event cases using Agent Workspace for HR Case Management.

A lifecycle event case is an HR case fulfilled by a lifecycle event. For example, the HR service for New Hire Onboarding fulfills the lifecycle event for New Hire Onboarding.

Note: This section assumes you have Enterprise Onboarding and Transitions activated. For more information, see Understanding Lifecyle events for enterprise.

You can see all lifecycle event cases in List Lists under the **Lifecycle Events** section.

Create a lifecycle event case using Agent Workspace for HR Case Management

There are multiple ways to create a Lifecycle Event case.

Before you begin

Role required: sn_hr_le.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. From the Lifecycle Events Cases list, select the **New** button.
   Alternatively, click the Add New icon and select **HR Case**.
3. Enter an employee name or case number.
4. Verify that the employee is the correct person for the case.
5. Enter **New Hire Onboarding** in the **HR service** field.
6. Select **Create Case**.
7. Select **Ready for Work**.
   The **State** changes to **Ready**. In the Details section, the **Assignment group** and **Assigned to** fields populate based on your case assignment rules or HR case template. For more information, see Assignment and matching rules in HR and HR templates.

Using the activity stream in Agent Workspace for HR Case Management

Use the activity stream section of Agent Workspace for HR Case Management to document work notes (private) or comments, respond to email, or view the state of the HR case.

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Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. In the Compose section, select **Comments** (visible to subject person) or **Work notes** (not visible to subject person).
3. Type your inputs in the space provided.
4. Click **Post Comments**.

> **Note:** There is also a **Comments/Worknotes** section at the bottom, left side of the form. This section is turned off by default, but can be used to enter text by clicking the accordion icon ( ). After entering text, click **Save**.

Machine learning solutions in Agent Workspace for HR Case Management

Use machine learning solutions to auto determine the correct HR service and assignment group for cases in Agent Workspace for HR Case Management.

Auto determination of HR service in Agent Workspace for HR Case Management

Auto determine the correct HR service for a case in Agent Workspace for HR Case Management. Enable an HR agent to transfer the case to the appropriate HR service rather than having to spend significant time manually triaging cases to appropriate HR services.

> **Important:** This feature is available with the HR Professional and HR Enterprise packages when you activate the Agent Workspace for HR Case Management and Predictive Intelligence applications. If you do not want to use this feature, disable the *sn_hr_core.case_auto_categorization* system property.

After you create the case, the HR Case Classification solution definition auto determines the HR service based on the short description of the case. The appropriate HR service for the case is displayed in a banner.

> **Important:** The banner is not displayed if:
>
> - you have logged the case under the correct HR service
> - you have manually transferred or auto-transferred the case
> - case is not in the ready or draft state

Auto training the predictive model

The HR Case Classification solution definition is configured and the predictive model is auto trained only when all the following conditions are met.

- The Human Resources Scoped App: Workspace (com.sn_hr_agent_workspace) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- There are 10000 records of HR case study matching the filters defined in the solution definition.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

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Note: Auto training does not happen if any one of the preceding conditions is not met. In such a case, Manually train the HR predictive model. Navigate to the **HR AI configuration** module, open the HR Case Classification record, and map the manually configured solution definition.

Auto determination of assignment group in Agent Workspace for HR Case Management

Auto determine the assignment group for a case in Agent Workspace for HR Case Management. Enable an HR agent to transfer the case to the correct assignment group rather than having to spend significant time manually identifying groups for the HR cases.

Important: This feature is available with the HR Professional and HR Enterprise packages when you activate Agent Workspace for HR Case Management and Predictive Intelligence applications. If you do not want to use this feature, disable the *sn_hr_core.case_auto_assignment* system property.

After a case is created, the Auto Assignment Group for HR Cases solution definition auto determines the assignment group from the Short description, Description, Opened for Title, Opened for Location Name, HR service of the case. The appropriate assignment group for the case is displayed in a banner.

Important: The banner is not displayed if:

- You have manually assigned the case to an assignment group.
- The assignment group is not identified for the case.
- The case is not in the ready or draft state.

Auto training the predictive model

By default the Auto Assignment Group for HR Cases solution definition is configured and the predictive model is auto trained when all the following conditions are met:

- The Human Resources Scoped App: Workspace (com.sn_hr_agent_workspace) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- There are 10000 records of HR case study matching the filters defined in the solution definition.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

Note: Auto training does not happen if any one of the preceding conditions is not met. In such a case, Manually train the HR predictive model. Navigate to the **HR AI configuration** module, open the Case Assignment group record, and map the manually configured solution definition.

Display similar closed cases in Agent Workspace for HR Case Management

Help an HR agent resolve the current case by displaying similar closed cases.

Important: This feature is available with the HR Professional and HR Enterprise packages when you activate Agent Workspace for HR Case Management and Predictive Intelligence applications.

Similar Closed HR Cases

When the Similar Closed HR Cases (ml_sn_sn_hr_core_global_similar_closed_hr_cases) is configured and the predictive model is trained:

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- Similar closed cases are displayed in **Similar Closed HR Cases** in the Related Search Results section. If there are three or more similar closed HR cases whose COE matches that of the current case, then the case with the highest confidence is displayed as a recommended HR case.
- If there is no recommended HR Case, then the knowledge article that is attached to more than three similar closed cases is displayed as a recommended article. The recommended article can be attached to the current HR case.

Auto training the predictive model

The Similar Closed HR Cases (ml_sn_sn_hr_core_global_similar_closed_hr_cases) is configured and the predictive model is auto trained when all the following conditions are met:

- The Agent Workspace for HR Case Management plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- The *glide.platform_ml.auto_training.enabled* system property is either set to true or absent.

Working with approvers for a case in Agent Workspace for HR Case Management

HR cases can be set up to require approvals before it can progress to completion.

The HR service configures actions related to approvals. For more information on HR service configuration, see Configure an HR service.

When a case requires an approver, the request for approval appears in the approver's Employee Center or portal under To-dos.

In Agent Workspace for HR Case Management, the child tab **Approvers** lists all requested approvers.

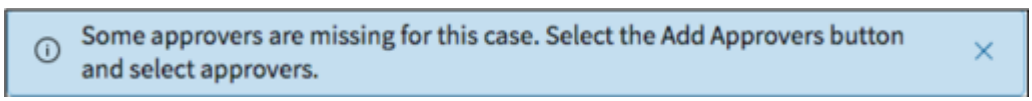
Multiple approvers

HR services can also have multiple approvers. When configuring an HR service, an optional configuration allows you to select approvers from the fields on the HR case. For example, manager of the Subject person can be selected as an approver. Using fields from a case provides maximum flexibility when assigning an approver. . For example:

When an approver is assigned from the case, it is possible that the approver may not be found. Following are a few circumstances under which the approver may be missing:

- the subject person manager is the approver.
- the Subject person's HR profile does not contain a manager.
- the Subject person's manager recently left the company.

When an approver is missing, the following message appears:



Add or substitute an approver in a case

Using Agent Workspace for HR Case Management you can add an approver or substitute missing approvers for cases that require approval.

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Before you begin
Role required: sn_hr_core.case_writer

Procedure
1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Locate and open an HR case that requires approvers.
3. Select **Add Approvers** from the list of UI actions (tabs at the top of the form).
4. Select replacement approvers or add new ones.
5. Select **OK**.
6. Select **Save**.

Add adhoc approvers to an HR case

Provide your agents with the flexibility to add adhoc approvers to a case that is part of an HR service.

Before you begin
For example, in certain scenarios where in an employee's requests falls outside the bounds of the standard process or the agent needs to take an additional approval, an HR agent might need to request an adhoc approval before proceeding with its fulfillment.

Role required: sn_hr_core.case_writer

Procedure
1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Open the case that is assigned to you.
3. Click **More actions** and select **Add an approval**.

Note:
- Administrator must have configured the **Agent Can Add An Approval** option on the HR service to which the HR case is associated.
- This option appears only to the **Assigned to** user, when the case is in **Ready** or **Work in progress** state.

4. Fill in the required fields in the **Add an approval** form.

Add an approval form

Field	Description
Approver users	Users who must approve the request.
Wait for	Conditions that you want to set for the approval flow. ○ **Anyone to approve**: If any one of the approvers approves the request, the approval flow will be complete. ○ **Everyone to approve**: Only if all the approvers approve the request, the approval flow will be complete.

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Field	Description
	○ **First response from anyone**: The first response of any one approver is taken into consideration. For example, if one of the approvers first rejects the request, the flow will be rejected; if one of the approvers first approves the request, the flow will be approved.
On rejection	Conditions that you want to set when an approver rejects a request.
Reason	Reason for initiating the approval flow.
Additional Comments	Any other information that you want to share with the approvers.

5. Click **Submit**.

View approval history in Agent Workspace for HR Case Management

Review the approval history in the activity stream. Get a better understanding of when the approval request was created, who were the approvers, and when was the request rejected or approved.

Before you begin

- Role required: sn_hr_core.case_writer
- Ensure that the following plugins are installed: Human Resources Scoped App:Core, Human Resources Scoped App:Lifecycle Events, Human Resources Scoped App:Lifecycle Events for Enterprise, HRSD Configurable Workspace, and Human Resources Scoped app Workspace.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Open a case that is in Ready state.
3. Activity stream contains the approval history, for example, when was the approval request created, who were the approvers, and when was the request rejected or approved.

Note:

- Approval history appears in activity stream only when the **glide.workflow.user_approval_history** property in **sys_properties.list** is set to true.
- If this property is set to true in HR Service Delivery workspace, it will be also to be true for all other installations within ServiceNow AI Platform.

Customize tab label in Agent Workspace for HR Case Management

Change the tab title for the HR Cases, in Agent Workspace for HR Case Management, based on any of the case field values enabling you to see more details on the tab when multiple tabs are open.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select HR Agent Workspace.

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3. Under the UX Page Properties tab, select **caseTabTitleField** property.

   The field value to be displayed on the tab title can be configured here.

4. In the **Value** field, provide the key value pair.

   The key being the table name, and the value being the field value. For example, "sn_hr_core_case": "opened_for". The value field has to be a valid JSON.

   Tab titles can also contain multiple fields. The key value remains the table name, but the value can be a list of strings. For example: "sn_hr_core_case": ["opened_for", "number"].

5. Click **Update**.

Customize related lists in Agent Workspace for HR Case Management

Customize which related lists are visible to users in Agent Workspace for HR Case Management.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases** > **All**.
2. Select the case that you want to customize related lists for.
3. Select the additional actions icon .
4. Navigate to **Configure** > **Related lists**.
5. Select the related lists and the desired order.
6. In **View name**, select **Workspace UIB**.
7. Select **Save**.

Customize Activity stream in Agent Workspace for HR Case Management

Customize the Activity stream to reduce agent effort in understanding the case context.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases**.
2. Select a case to customize Activity stream for.
3. Select the activity stream icon .
4. Select the filter activity icon .
5. Select the required activities and the desired order.
6. Select **Save**.

Customize fields in a form in Agent Workspace for HR Case Management

Add and arrange fields within a form layout to match form requirements using Form builder in Agent Workspace for HR Case Management.

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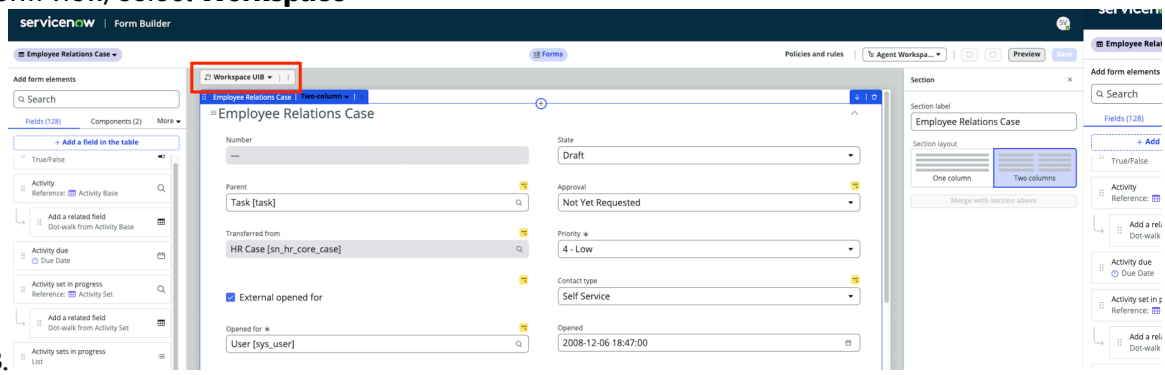
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **HR Case Management** > **All HR Cases** > **All**.
2. Select the case that you want to customize form fields for.
3. Select the additional actions icon .
4. Navigate to **Configure** > **Form Builder**.
5. In form view, select **Workspace UIB**.



6. Customize the fields by performing one of the following actions.

Option	Action
Add an existing field to a form	**a.** Select a field from the **Fields** list. **b.** In the form editor, drag the selected field to the desired location and move them around as necessary. **c.** Select **Save**.
Add a new field to a form	**a.** Select **+Add a field in the table**. **b.** In the **Column Label** field, enter a label. **c.** In the **Column name** field, enter the internal name for the field. **d.** Select the type of field from the **Type** list. To set additional properties for the field that you are creating, click **Advanced settings**. **e.** To add the new field to the table, click **Add**. A confirmation dialog displays. You can click **Done** to close it or click **Add another one** to add more fields to the table. **f.** In the form editor, drag the new field you just created to the desired location and move them around as necessary. **g.** Select **Save**.

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Option	Action
Delete a field in the form	**a.** In the form editor, select a field from the **Fields** list. **b.** Select the x icon beside the field. **c.** Select **Save**.

Highlight fields in Agent Workspace for HR Case Management

Highlight fields in the workspace to call an agent's attention to them.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workspace Experience** > **Administration** > **Highlighted Values**.
2. Select **New**.
3. On the form, fill in the fields.

Highlighted Value form

Field	Description
Table	Name of the table that contains the fields you want to highlight.
Field	Name of the field you want to highlight if the triggering conditions are met.
Application	Scope of applications this highlighting pertains to.
Workspace	The workspace this highlighting applies to. Select **Agent Workspace**

4. Right-click the header and select **Save**.
5. In **Highlighted Value Conditions**, select **New**.
6. On the form, fill in the fields.
   For a description of field values, see Highlighted value condition form.
7. Select **Submit**.

Employee Document Management for Agent Workspace for HR Case Management

Employee Document Management provides storage space, a filing system, the ability to easily retrieve documents, defining who can view sensitive documents, and when to purge documents.

For more information about Employee Document Management, see Employee Document Management.

Create or upload employee documents using Agent Workspace for HR Case Management

Create or upload employee documents to an HR case using the Agent Workspace for HR Case Management.

Before you begin

Role required: sn_hr_ef.document_writer

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Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Click the **Lists** icon ().
3. Click **Employee documents**.
4. Click **All**.
5. Click **New**.
   Alternatively, you can also create an employee document from **HR Profiles**. Select a HR Profile and from the more actions menu, click **New document**.
6. On the form, fill in the fields.

Employee Document form

Field	Description
Employee Document	Employee document to upload. Click **Browse** to upload an employee document. By default, the maximum size of a document allowed is 30 MB. The default can be changed from the**Maximum file upload size in megabytes** field in Employee Document Properties. For more information, see Properties for Employee Document Management application. After selecting a document, the read-only fields show the file size, file format, created on, and created by. The viewer within the UI only supports viewing .pdf documents. Other types of documents can be downloaded and then viewed. For optimal search results, do not use dashes (-) in the name of the document. Using full words separated by spaces or underbars provides better search results. Check **Yes** in the **Enable Document Viewer to preview pdf documents** in the Employee Documents property to view .pdf documents. **Note:** FedRAMP, on-premise customers, mobile devices, customers using edge encryption, or encryption support does not support viewing documents.
Description	Description of the employee document.
Employee	Name of the employee the document is associated with.

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Field	Description
Document type	Document type associated with the employee document. Document types provide categorization, security, and retention policies.
HR case	HR case number the employee document is associated with when moved from an HR case.
Purge hold	Purge hold status of a document. ○ Pending purge authorization: Awaiting authorization for document purging. ○ Purge Approved: Document has authorization to schedule purging. ○ Purged Rejected: Document did not receive purge authorization. **Important:** Document type's security policy determines purge authorization. The following roles have permission to change purge authorization: ▪ EF admin [sn_hr_ef.admin] ▪ Employee File Management Manager [sn_hr_ef.manager]

7. Click **Save** to create the employee document record.
   The **Audit Trail** tab appears.

   Provides view of all actions for an employee document from creation or uploaded to the time it is purged.

Move employee documents in Agent Workspace for HR Case Management

Move employee documents from a case in Agent Workspace for HR Case Management to employee document repository. The employee document repository provides a central repository for quick and easy identification of documents using different sorting features.

Before you begin

Role required: sn_hr_ef.document_writer, sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select a case that has employee documents attached.

   Note: From the list view, there is no way to identify HR cases with employee documents attached. To locate an HR case, you need the HR case number or the Opened for person.

3. Click **Move Attachments**.
4. In the Move Attachments to Employee documents window:

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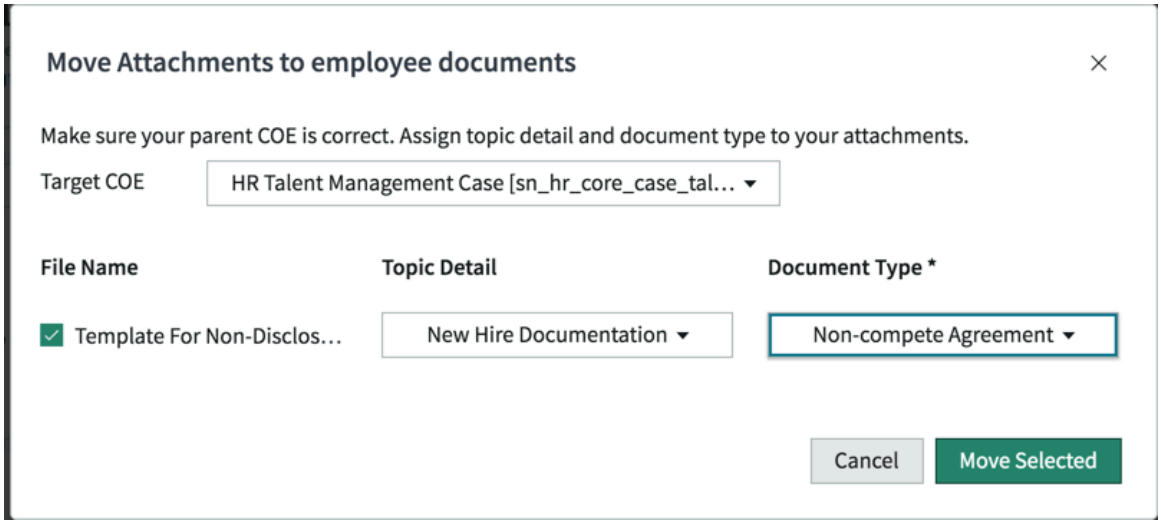
a. Select the check box next to the documents you want to move.

b. Select the **Document Type** for each document. The document type determines categorization, who can access it, and the retention policy. Create a document type if none appears for the associated topic detail. Creating a document type ensures correct categorization.

c. Click **Move Selected**.

Note: The **Target COE** and **Topic Detail** fields can be modified only if the document has been added under the wrong type of HR case.



Result

- The employee documents move from the HR case to the employee document repository.
- To view a list of all employee documents in the list column, select **Employee Documents**.
- The moved attachments appears in the contextual side panel under the employee documents icon within the case.

E-signature in Agent Workspace for HR Case Management

When working on an HR case or HR task, you can use e-signature to sign documents that require signatures.

When an employee creates a case requesting an employment verification letter, you can:

- Preview the document - Ensures you sign the correct document. This step is useful if you have multiple employment verification letters.
- Use e-signature to sign it - You have multiple methods to sign. Choose to type your name or use your mouse to draw your signature. For more information, see .

  You can optionally require a user to check an acknowledgment box before the signature is accepted.

- Generate the document - Combine the document template with your signature and create an attachment to the case. If you use Employee Document Management, you can move the attachment to your document repository for storage.

Note: For more information, see Configure an e-signature template.

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Sign and generate a document in Agent Workspace for HR Case Management

Electronically sign a document.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Locate and open an HR case.
   Ensure that the state of the case is **Work in Progress**.
3. Select the **Sign Document** button.
4. Preview the document.
   Ensure it is the correct document for the case.
5. Select **Type signature** to type in your signature, or select **Draw signature** to draw your signature using your mouse.
6. Select Generate to attach your signature to the document.
   The generated document is displayed under the Attachments in the contextual side panel. If your company uses Employee Document Management (EDM), you can move the document to the EDM repository. For more information on EDM, see .

Using the deep link feature in Agent Workspace for HR Case Management

Deep links are a way to access information from outside of Agent Workspace for HR Case Management.

Use deep links to access information or applications that are not readily available within Agent Workspace for HR Case Management. For example, use deep links to access a third-party application that you use frequently.

For more information on configuring deep links, see Link generator for HR Service Delivery.

Using chat in Agent Workspace for HR Case Management

Agent chat for Agent Workspace for HR Case Management enables you to ask questions and receive information through live or virtual agent chat.

Activation

Ensure you have activated the Agent Chat [com.glide.interaction.awa] plugin prior to using this feature. For more information on setting up chat, see Agent Workspace chat.

HR groups

Ensure that your HR agents are part of an HR group or subgroup. Having subgroups helps to ensure HR agents with the correct skills and knowledge pair up when an employee initiates a chat.

For example, an employee initiates a chat requesting information about your company's benefits. Having a benefits subgroup with agents that specialize in your company's benefits ensures the employee's chat is directed to the correct agents.

For more information about HR groups, see Manage HR Groups.

Interaction records

Agent chat automatically creates interaction records. When an employee initiates a chat with an HR agent, an Interaction case is automatically created.

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Quick actions

Using quick actions, you can:

- Create an HR case.
- Show applicable response templates.
- Transfer chat to another agent.
- Transfer chat to another queue.

Virtual agent

Automating chat can enhance the employee experience by addressing queries immediately. At any time during a virtual chat, the employee can request to interact with a live HR agent.

For more information on virtual agent, see Virtual Agent for HR Service Delivery.

Working from the agent inbox in Agent Workspace for HR Case Management

Use the agent inbox to manage your incoming work, such as chats, HR cases, and interactions.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the  inbox icon.
3. From **Status**, select **Available**.
4. When a chat comes through the chat queue, select **Accept**.
5. From the active chat panel, you can start chatting.
6. Select the  quick action icon, or enter a back slash (/) in the chat area.
7. Select a quick action to quickly create an HR case, show related response templates, transfer chat to another agent, or transfer the chat to another queue.

Viewing SLAs for HR Service Delivery Agent Workspace

Service Level Agreements (SLAs) can be viewed for cases or tasks and provide progress information.

HR Agent Workspace SLAs

View SLAs for HR cases from the Agent Workspace home page:

View SLAs for HR tasks from the Related Items menu.

HR Playbook SLAs

View SLAs for HR Playbook from the case card.

Note: For more information on SLAs, see Service Level Management.

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SMS conversations in HR Service Delivery Agent Workspace

Using the Conversational SMS service channel app, available on the ServiceNow Store, HR agents can provide support for long-running SMS conversations via HR Service Delivery Agent Workspace. Requesters can initiate HR support conversations through SMS.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

SMS support conversations

SMS support conversations can run long. For this reason, HR Service Delivery workspace agents need the ability to track ongoing conversations on the HR SMS service channel. HR Service Delivery workspace agents can initiate or continue SMS conversations and also accept SMS work items from the HR Service Delivery Agent Workspace Inbox.

For SMS support conversations, in the Workspace Chat panel, when the interaction type is **Messaging**, an interaction sub-type of **SMS** is indicated as **Active SMS**.

For complete details about SMS support conversations, associated service channels, requestor initiated, and agent initiated SMS conversations, refer to Conversational SMS service channel.

SMS support conversations for HR Service Delivery agents

HR agents can access new SMS messaging interactions, as well as access ongoing SMS messaging conversations. Agents can switch from an in-progress messaging interaction, such as a chat, to a new SMS messaging interaction.

Advanced Work Assignment HR agents and managers can end an SMS messaging conversation. HR agents with the awa_agent role can end an active SMS messaging conversation assigned to them using the **End conversation** action button. Users with the awa_manager role can end the conversation even when it is not assigned to them on the interaction. When an agent ends the conversation, a confirmation to close the interaction appears.

HR AWA agents and managers can switch from an in-progress messaging interaction to a new messaging conversation. Switching to a new messaging interaction does not close the original messaging interaction, but enables agents to carry on multiple messaging conversations. AWA agents can access ongoing messaging conversations when the HR AWA agents and managers have access to ongoing messaging conversations and are notified when there is a new message on any long running assigned interactions. When an ongoing messaging conversation has a new message that needs attention, an icon is displayed after the Inbox icon in HR Service Delivery Workspace. A new tab carries a counter badge that indicates the number of messaging conversations that have unread messages. AWA agents and managers can view cards for messaging conversations.

HR AWA agents and managers can view a list of all **In Progress** or **On Hold Messaging Work Items** assigned to other agents. The list indicates the service channel, interaction number, and last updated date. Agents can click the list item to open it in a Workspace tab. Agents can open a messaging interaction in a sub tab and, if the interaction is active, view the chat panel on the interaction record. Agents can type messages in the chat panel to have an SMS conversation with an employee.

Quick actions for agents

Access existing chat-based quick actions for SMS messaging. For details, refer to Agent Chat.

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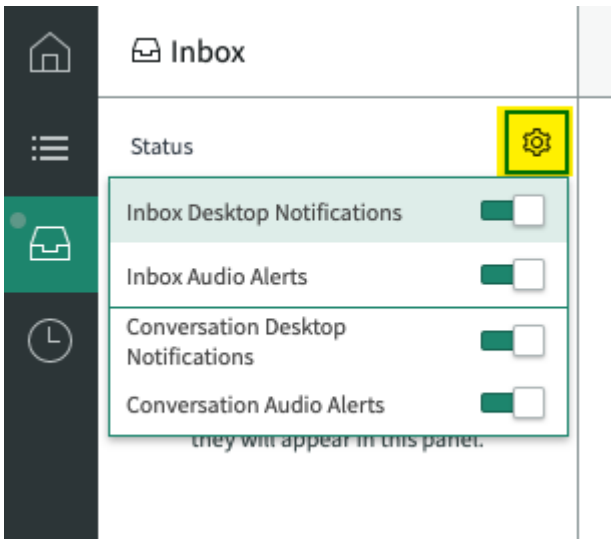
Conversation desktop notifications

HR agents can set preferences to receive conversation desktop notifications, audio alerts, and Google Chrome browser toasts. Audio alerts and desktop notifications occur when agents opt in to receiving **Conversation Audio Alerts** and **Conversation Desktop Notifications** via the HR Service Delivery Agent Workspace Inbox settings.

Once opted in, agents hear an audio alert when a new message occurs on a conversation that is currently open in a workspace tab, but not in focus. Audio alerts also notify when a long running conversation is assigned to an agent, but is not currently open in a workspace tab. Agents decide if they want to enable these alerts and notifications.

Use the edit menu in the HR Service Delivery Agent Workspace Inbox to enable alerts and notifications.



Agents can receive Google Chrome browser toasts when the following criteria is met:

- The agent has opted in to receive **Conversation Desktop Notifications**.
- The agent is using Google Chrome browser.
- The Workspace browser tab is not in focus.
- A new message on an existing conversation, assigned to the agent, is in one of the following places:
  - A currently open Workspace tab.
  - Not in a currently open Workspace tab, but in a long running conversation in an ongoing section of Workspace.

Employee initiated SMS conversations

Employees can initiate HR support conversations through SMS. Agents can expect the system to automatically associate the sender phone number to the channel user profile. If an SMS message is received for a non-existing channel user profile, a new channel user profile is automatically created by the system. The system queries the **Mobile phone** field on employee HR profile for a match. When a match is found, the system associates the employee with the newly created channel user profile. If more than one match is found no association is made on the channel user profile. If no match is found no association is made on channel user profile.

When an employee adds a phone number to an SMS messaging interaction or updates a phone number on the interaction, the Number field on the interaction updates from null to the

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employee's name. The HR profile for that employee is associated to the phone number. Only one active channel user profile can exist for a given phone number at any time.

Set up HR Service Delivery Conversational SMS service channel

Configure the Conversational SMS service channel store app for HR Service Delivery.

Before you begin

Role required: admin

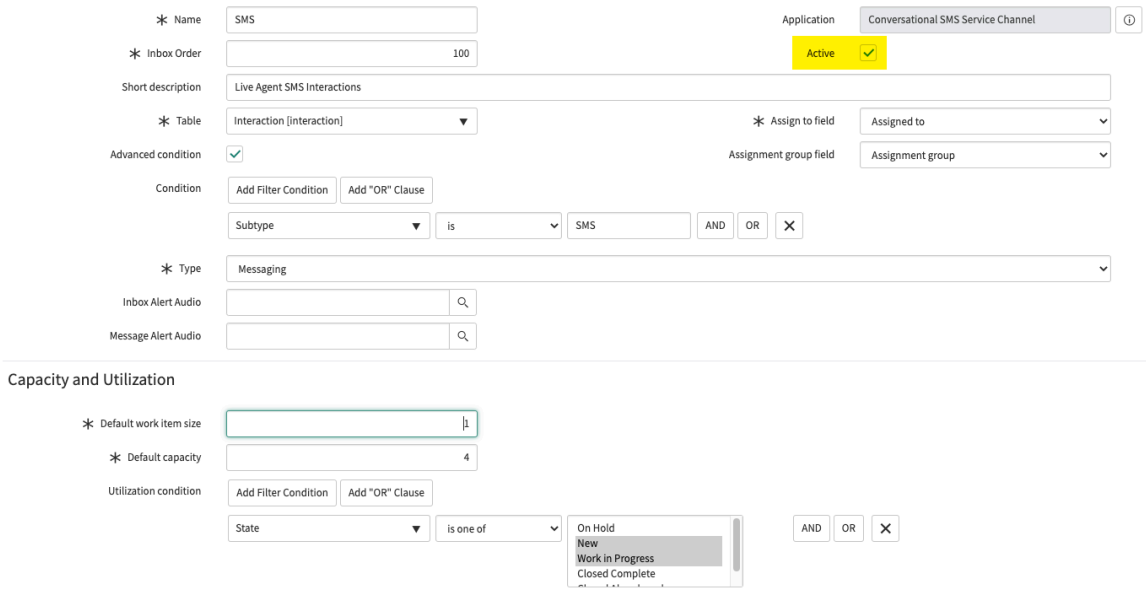
About this task

The HR Service Delivery base system includes the **HR SMS** service channel queue with the default **HR SMS Support Group** assignment group. The **Agent assignment rule** is capacity based by default. For HR Service Delivery, configure the SMS service channel for the HR SMS queue.

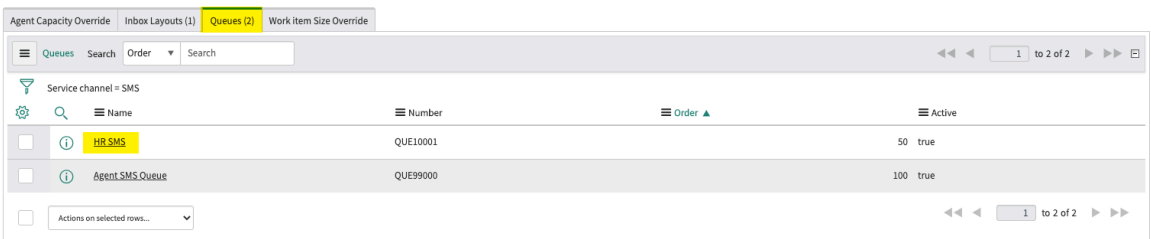
Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Service Channels**.
2. Click the **SMS** service channel.
3. On the Service Channel SMS form, select the **Active** check box to activate the service channel.

   Note: By default, most of the form is populated for you. **Capacity and Utilization** fields are set to 1 for **Default work item size** and 4 for **Default capacity**. You can change these, and any form values, if desired.



4. Click the Queues related list to view and configure the HR SMS queue.



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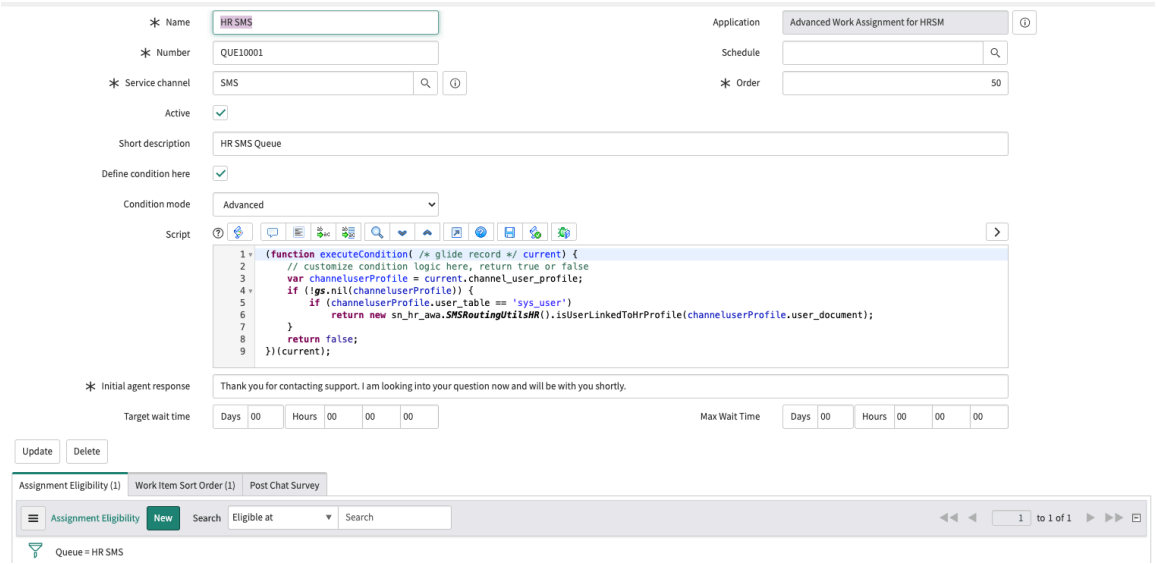
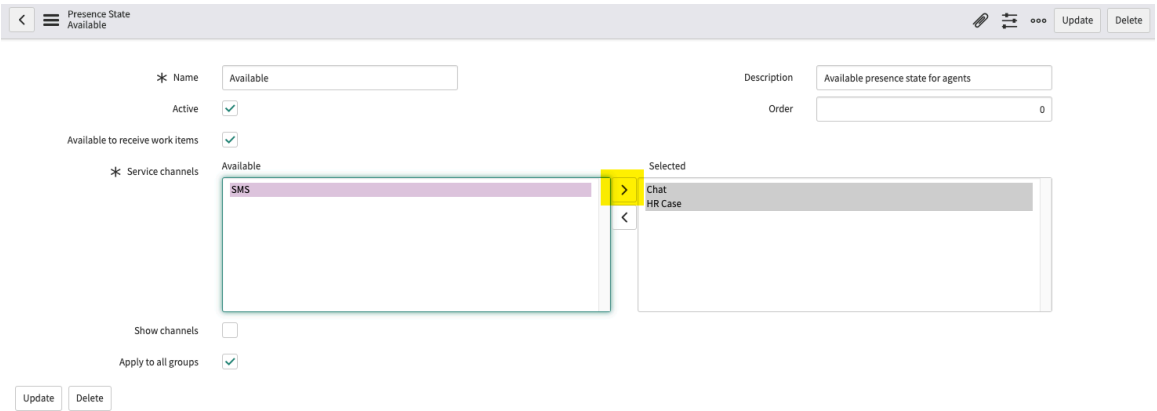
5. View the default configurations on the Queue HR SMS form, ensuring the **Active** check box is checked.
6. Modify values as you desire.



7. Click on any of the related lists to view or modify default configured values.

> **Note:** Notice that the Assignment Eligibility related list defaults to the **HR SMS Support Group**. Manually add users to this group to route assignments. Refer to Add a user to a group to learn how to add users to this group.

8. Click **Update** to save any changes you made.
9. Update the Advanced Work Assignment Presence States by navigating to **Advanced Work Assignment** > **Settings** > **Presence States**.
10. Click **Available** in the Presence States list.
11. In the Presence State Available form, select **SMS** in the **Service channels Available** column and move it to the **Selected** column using the right-pointing arrow.



12. Click **Update**.

> **Note:** For complete information regarding Conversational SMS service channels and setup guidance, refer to Conversational SMS service channel.

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Compose an SMS message from a chat in HR Service Delivery Agent Workspace

Create and send an outbound SMS message to a recipient directly from a chat interaction. Access interactions assigned to you to follow up via SMS message when you need more details from the employee.

Before you begin

Role required: sn_hr_core.case_writer

About this task

An interaction is a request for assistance made through chat, phone, or in person. Interaction records are automatically created when you are using agent chat.
The **Compose SMS** option is only enabled for active chat interactions. For more information about interactions in HR Service Delivery, refer to .

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select the  HR case list icon and navigate to **Interactions** > **Assigned to me**.
3. Select an active chat interaction for which you would like to respond to the recipient via an SMS message.
4. In the chat interaction modal, click the  more options icon and select **Compose SMS** to initiate an SMS conversation with the recipient.
   The **Send via SMS** modal launches with **Send from** and **Send to** fields.
5. Use the drop-down **Send to** field to select the SMS recipient.
   You can choose an automatically populated phone number or choose **Other** to enter the phone number manually in the **Other number** field. Automatically populated phone numbers display based on the following criteria:

   The **Opened for** field is populated on the interaction with phone number.

   The phone numbers as specified on the HR Profile record. The label for each phone number on the **Send via SMS** modal will match the label for the **Phone number** field on HR Profile record.

   If a manually added phone number is not associated with an existing active channel user profile record, the record is created automatically when you send the SMS message.

   Note: When an interaction is created with phone number p1, not associated with an existing HR Profile, a channel user profile is be created as a Guest. When the user updates an HR Profile, HRP1, with a phone number p1, the user is treated as HRP1.

6. Compose the SMS message, add an attachment if necessary, and send to the employee.
   You can also select the  quick action icon, or enter a back slash (/) in the chat area, to use quick actions for SMS messaging. See Agent Chat for more information.
   You will receive a confirmation when the SMS message is sent. Click the confirmation to view the interaction details,if desired.

   Note: For complete details regarding initiating SMS conversations in Agent Workspace, refer to Agent initiated SMS conversation. For details about using Agent Workspace with HR Service Delivery, refer to .

View a special handling note in HR Service Delivery Agent Workspace

When configured, special handling notes appear for HR cases that require special attention.

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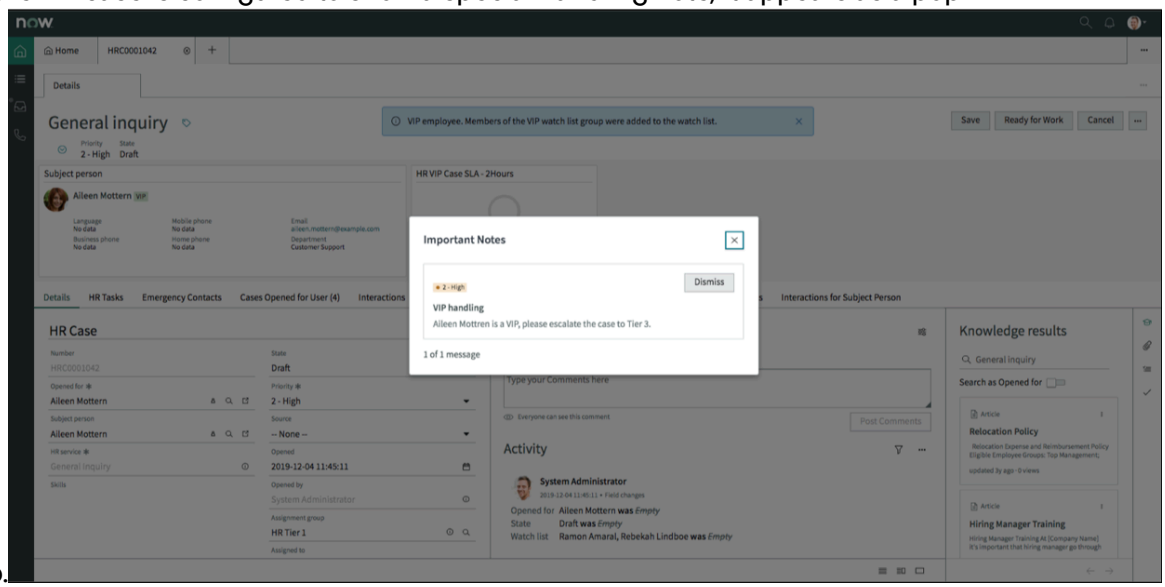
Before you begin
Role required: sn_hr_core.case_writer

Procedure
1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Locate and display an HR case.
   If the HR case is configured to show a special handling note, it appears as a pop-up.


3. Read the note and select **Dismiss**.

Create a bulk case request using Agent Workspace for HR Case Management

Create bulk case requests through Agent Workspace for HR Case Management to create the same type of HR case for multiple employees without having to create the same case multiple times.

Before you begin
Role required: sn_hr_core_admin

Procedure
1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. Navigate to **Bulk cases** > **Bulk case requests**.
4. Select **New**.
5. On the form, fill in the fields.
   For more information, see Bulk case request form.
6. Select **Save**.

   The **Details**, **User segment groups** and **Cases created** tabs are displayed.
7. Create a user segment group.
   For more information, see Specify a user segment group for a bulk case request in Agent Workspace for HR Case Management.

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Note: You can also configure fields that you want to view in the User segment group form by configuring fields in the Case Creation Configuration form. Navigate to **All** > **HR Administration** > **Case Creation Configuration**.

8. **Optional:** View details of your bulk case request by selecting the **Details** tab when your segment status changes to **Processed**.
9. Create cases for all users with a status of Included who meet the filter criteria by selecting *Create cases*.

Note: After selecting the **Create cases** button, all users with a status of **Included** are rechecked against the filter criteria used. Cases aren't created for users that no longer match the filter criteria. Cases are also not created for users that match the criteria after the user segment was created.

10. **Optional:** Select the **Cases created** tab to view a list of cases created.

Specify a user segment group for a bulk case request in Agent Workspace for HR Case Management

Create a user segment group to specify in a bulk case request the users for whom a case will be created. You can specify values for a group of users or specify multiple segments with different values for different groups of users.

Before you begin

Role required: sn_hr_core_admin

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ().
3. Select **Bulk case requests**.
4. Select the bulk case request.
5. Select **Create segment group**.
6. On the form, fill in the fields.

Create user segment group: details table

Field	Description
Label	Label that describes the user segment group.
Opened for	Employee to be assigned as the Opened for person on each case. For example, for an onboarding bulk case request, you would select the hiring manager.
Work notes	Further details about the user segment.

7. Select **Next**.
8. Indicate how you will indicate which users the bulk case request will create cases for in the **Filter by** field.

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Data source	Description
File	Upload a file with user names or email ad dresses. **a.** Select the file type in the **Template file type** or, for a pre-formatted Excel spread sheet, select **Download template**. ▪ **User name template** - A file containing user names. ▪ **Email template** - A file containing email addresses. **b.** Find and select the file you're uploading by selecting **+Add File**. **c.** Select **Upload**. **d.** Select **Process file**.
HR criteria	Criteria based on conditions defined by the HR Profile [sn_hr_core_profile] or User [sys_ user] tables.
User criteria	Criteria based on role, department, group, lo cation, or company.
HR profile	Condition based on the HR profile [sn_hr_ core_profile] table.
Users	Conditions based on the User [sys_user] ta ble.

9. Select **Create segment group**.
   The **Bulk Case Request** form is displayed with the user segment group you created.

   Note: You can still review and edit your user segment group. For more information, see Review users in a user segment group.

Review users in a user segment group

After creating a user group segment, review and edit users before you create cases.

Before you begin

Role required: sn_hr_core_admin

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Select the **Lists** icon ( ).
3. Select the **Bulk case requests** tab.
4. Select the bulk case request.
5. Select the **User segments group** tab.
6. Select the user segment group.
7. Select the **User segments** tab.
8. Review the list of users that meet the criteria.

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The case creation statuses are:

- Included: The user matches the filter criteria and a case will be created for the user.
- Excluded: The user does not match the criteria and a case will not be created.
- Duplicate: The user is listed multiple times.

Review result	Action
Some user statuses need to be modified	**a.** In the **Status** column for the user whose sta tus you want to change, select the Status value. **b.** Select the new status. **c.** Select **Save**.

HR Walk-up

The HR Walk-up feature offers a convenient and efficient way for users to seek immediate assistance and support for their HR-related issues. With designated walk-up centers, users can seek in-person or remote assistance, report issues, and receive guidance from HR agents.

Note: The HR Walk-up feature is available when the Walk-up Experience (com.snc.walkup) and Employee Center Pro (sn_ex_sp_pro) plugins are installed.

Walk-up Experience

Walk-up Experience enhances user satisfaction and productivity by providing immediate and personalized support for IT-related needs.

Every employee or a guest can check in and get support at an established walk-up service center.

Employee Center Pro Kiosk

Employee Center Pro Kiosk enables all deskless workers with simplified access to information and services for self-serve and improved productivity.

- Access information and use services.
- Provide self-service options such as raising and tracking requests.

HR Walk-up lists

HR Walk-up lists consist of the following categories:

HR Walk Up list categories

Name	Description
Walk-up locations	HR agents can view a list of the walk-up queues they are assigned to support. Locations queues reveal all the information an HR agent must know to operate the queue efficiently. Select a location from the list to see the details, such as interactions, appointments, and reasons for visits.

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HR Walk Up list categories (continued)

Name	Description
Location kiosks	Location kiosks offer immediate assistance to the requesters by supporting them with technical issues, questions, or requests. The requesters can receive on-the-spot guidance or resolution for their HR-related problems.
Your assigned walk-ups	Interactions you assign to yourself when you accept an active interaction or that are assigned to you. HR agents assign interactions to themselves when they accept a queued interaction. Managers can assign interactions to specific HR agents.
Open-unassigned walk-ups	All open but unassigned interactions associated with your specific walk-up queue location. The interaction is Queued until an agent accepts it or is assigned the record.
Closed walk-ups	All Closed Complete and Closed Abandoned interactions assigned to a specific walk-up location queue. HR agents can abandon an interaction when a requester leaves the queue before receiving support.
Appointments	Walk-up appointment record that is created when a requester raised an appointment request from Employee Center.

Use HR walk-up

Use HR walk-up to support HR requests raised by deskless workers.

Before you begin

- Role required: sn_hr_core.case_writer
- Verify that the Walk-up Experience (com.snc.walkup) and Employee Center Pro (sn_ex_sp_pro) plugins are installed.
- Employee must raise a walk-up appointment request. See Plan your walk-up experience visit with Employee Center for more information. Based on the service and location, the appointment is assigned to an HR agent.

Procedure

1. Open HR Agent Workspace.
2. From Lists, navigate to HR Walk-ups.
3. From the HR walk-up appointments, select a walk-up appointment record.
   A read-only view of the walk-up appointment is displayed. From Attachments, you can download the outlook invite to your outlook calendar.
4. Select **Open interaction**.
   Interaction record enables you to communicate with the requester. You can further create a case from the interaction based on your use case.

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5. To start working on the interaction, select **Accept**.
6. To put the interaction on hold while you get additional information on the request, select **Put on Hold**.
7. To cancel the interaction or appointment when a requester leaves the queue before receiving support, select **Abandon**.

> **Note:** Both the interaction and HR walk-up records are automatically closed when the requester cancels the request from Employee Center.

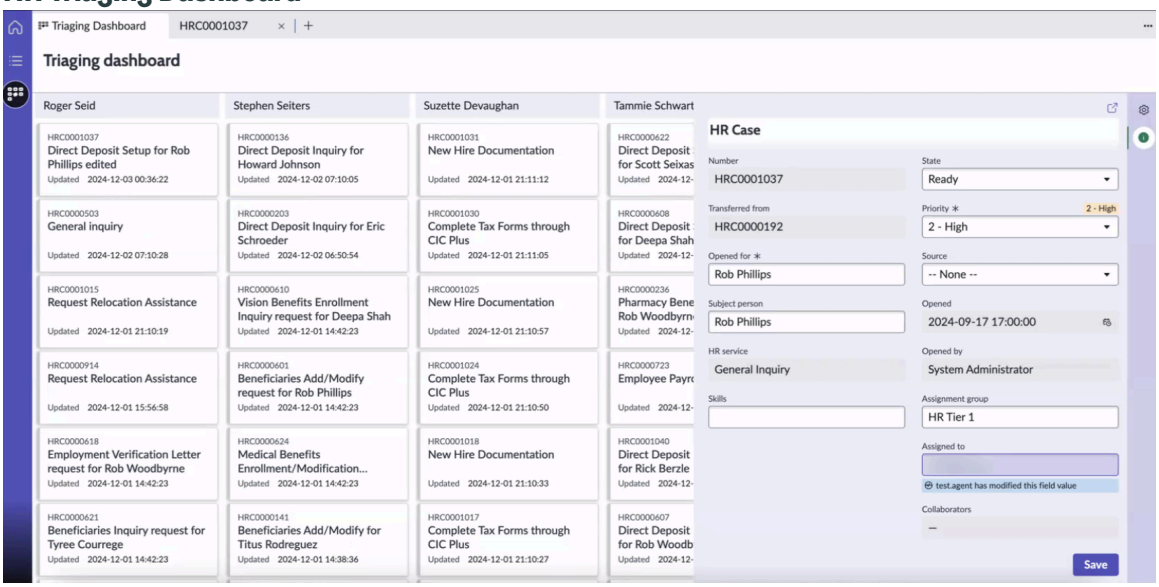
HR Triaging Dashboard

The HR Triaging Dashboard enables you to review your teams' case assignments in a layout where cases are displayed as cards. This layout enables easy movement of case cards between lanes, enabling you to review and reassign cases by auto-updating HR service, or user, or priority.

Key features

- Ability to configure lane (priority, or assignment group, or HR service) by which you want to view your teams' HR cases.
- Ability to configure case fields and the order by which you want case fields to appear on the case card.
- Auto-update priority, assignment, or HR service of an HR case by moving a case card from one lane to another.

HR Triaging Dashboard



Configure the HR Triaging Dashboard

Configure the settings in the Triaging Dashboard so that you can view your team's case assignments categorized by HR service, or priority, or assignment group.

Before you begin

Role required: sn_hr_core.case_writer

> **Note:** Ensure that Kanban Components [sn_knbn_comp] and Kanban board component [sn_visual_board] are installed.

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Procedure

1. Open HR Agent Workspace.
2. Select the Triaging Dashboard icon .
3. Select the Settings icon .
4. In the Settings section, perform the following steps:
   - Select a COE (Centers of Excellence) to view only the HR cases specific to that COE. HR Centers of Excellence categorize cases based on unique function or discipline such as payroll or employee relations.
   - Specify filter criteria to select fields that you want to view on the HR case card. Use the **Filter** criteria, or select the fields manually by expanding the **Fields to show on case card**.
   - Choose a lane by selecting a value from the **Vertical lane** list: HR service, or priority or HR assignment group.
     a. Select **HR Service** in the **Vertical lane** list.
     b. Select the HR services that you want to view as vertical lanes in the HR Triaging dashboard.
     c. Select the required value in the **Transfer method** field.

Transfer method field values

Field value	Description
Always ask	The transfer case window appears when you move a case card to another lane.
Transfer with existing case number	When you move a case card to another lane, the case is assigned to the new HR service with the existing case number.
Transfer with new case number.	When you move a case card to another lane, the case is assigned to the new HR service with a new case number.

     d. Select **Apply**.
     or
     a. Select **Assignment group** in the **Vertical lane** list.
     b. Select users.
     c. Select **Apply**.
     or
     a. Select **Priority** in the **Vertical lane** list.
     b. Select **Apply**.

What to do next

1. View HR cases based on configured settings.
2. Drag and move a card to the respective lane.

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a. **HR service** as lane heading: When you drag a case from one lane to another, case transfer is done based on the value selected in the **Transfer method** field.

b. **Priority** as lane heading: When you drag a case from the one lane to another, the priority of case is updated to the respective lane value.

c. **Assignment group** as lane heading: When you drag a case from the one lane to another, the case is assigned to the respective lane user.

Integration with Contact Center as a Service (CCaaS)

Implement prebuilt, certified integrations with Contact Center as a Service (CCaaS) providers using the ServiceNow® voice reference architecture.

About this task

The Interaction Controls Component (ICC) feature enables CCaaS providers to display native voice and callback integrations so HR agents can manage customer calls directly from HR Agent Workspace.

HR agents are provided a brief wrap-up period at the end of customer conversations to complete their work before moving on to assist other customers. Review the HR interaction wrap up for more details.

The voice controls and callback controls display under the following conditions:

- When the interaction is a phone call, voice controls display. When the interaction is a phone call that is associated with a callback task, the callback controls the display.
- The **Enable interaction controls** field is enabled on the OpenFrame Configuration record that allows the admin to configure the Agent Workspace to display voice interaction components.
- The agent is a member of the user group specified on the OpenFrame Configuration record. If no user group is specified, all agents can access the HR voice interaction record page.
- Ensure that the certified third-party App Store plugin is installed. For Example:
  - Unified Experience from Genesys
  - Unified Experience from Genesys - Core

> **Note:** Integration with Contact Center as a Service (CCaaS) is currently available only with Genesys application.

Before you begin

Ensure that the Interaction Controls Component (ICC) plugin (com.app_interaction_control) is installed to use the ICC voice features for CCaaS.

Role required: admin

Procedure

1. Navigate to **All** > **OpenFrame** > **Configurations**.
2. Create a new configuration record for the specific CCaaS provider.
   Some CCaaS providers can include OpenFrame configurations for their plugin.
3. Turn on the interaction controls for OpenFrame by selecting the Enable interaction controls check box.
   The Enable interaction controls field is enabled on the OpenFrame Configuration record that enables the admin to configure the HR Agent Workspace to display voice interaction components.
4. From the **User Group** column, select a group and move it to the selected column.

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This is the group of users to whom the OpenFrame configuration applies.

5. Unlock the URL field.
6. In the URL field, enter a third-party URL.
   CaaS providers have specific configuration requirements for their plugins. Refer to the relevant contact center documentation for setup instructions.
7. Select **Update**.

What to do next

Refer to Plugin requirements for dependencies and address all prerequisite requirements to access the ICC features.

Plugin requirements

For the Interaction Controls Component (ICC) call features to work, you must have a combination of plugins that can be downloaded from the ServiceNow® Store and CCaaS providers.

The CCaaS providers must integrate with the ServiceNow platform. Additionally, they must submit their plugin for certification, to be made available for use from the ServiceNow® Store.

The following plugins are required to deploy the call control integration with the contact center platform:

- Interaction Controls Component (ICC) (sn_int_control)

  The following plugin and app dependencies are installed as part of the ICC plugin:

  Plugin dependency:

  - Glide Conversation Server (com.glide.cs)
  - Glide Conversation Server Custom Adapter (com.glide.cs.custom.adapter)
  - Appointment Booking (com.snc.appointment_booking) is required for callback integrations.
  - Openframe (com.sn_openframe)

  App dependency:

  - External Agent Management Util Pack (sn_external_agent)
  - Contact Center Integration Core (sn_ct_ctr_it_core)
  - Omnichannel Callback (sn_omni_callback)
  - OpenFrame (sn_openframe)
- Advanced Work Assignment

  The External Routing Support plugin is required for callback integration with contact centers.
- Agent Workspace, as well as any workspace that works with Agent Chat, Email Interaction, or Messages.
- Products with Contact Center Integration Core Plugin
  - Application Spoke Selector
  - External Agent Management Util Pack

  Note: Address the Contact Center Integration Core plugin dependencies prior to downloading the plugin.

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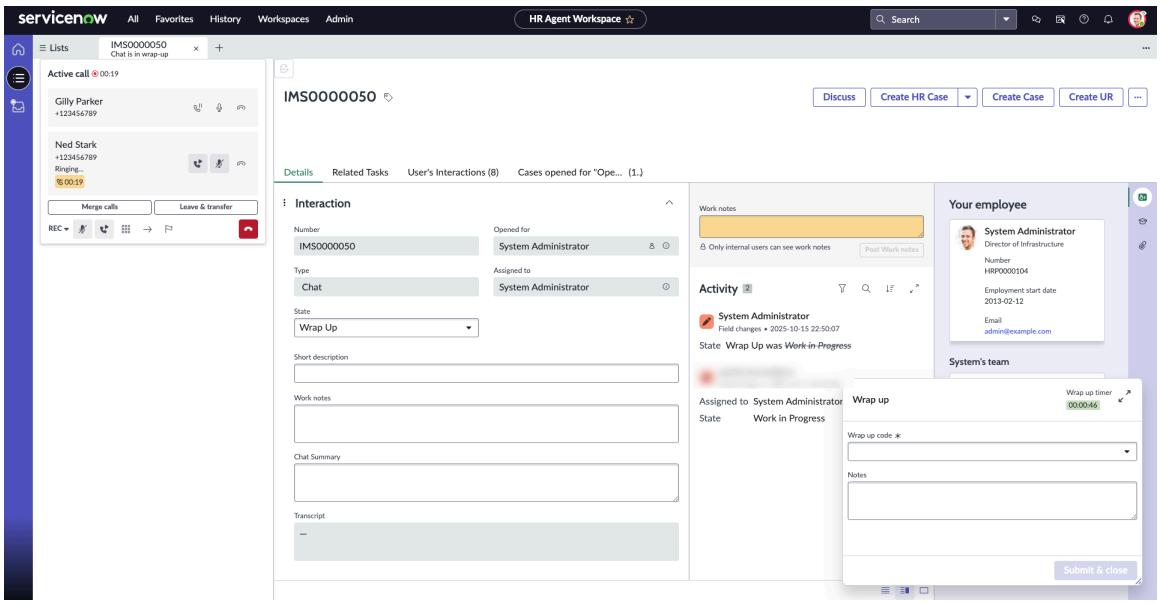
HR interaction wrap up

Interaction wrap up provides HR agents with a brief wrap-up period at the end of customer conversations. HR agents can use this time to complete their work before moving on to assist other customers.

Interaction wrap up feature is available for interaction type: **Phone**. When enabled, an interaction record moves from the Work In Progress to the Wrap Up state at the end of a customer conversation. This brief, configurable period enables agents to complete tasks such as posting work notes and updating record information before moving on to other work items. While in the Wrap Up state, an agent's capacity is not reduced until the state of the interaction moves to Closed Complete.

Note: You can view the wrap up record within the Wrap up sub-list inside the Interaction list.



Configuring interaction wrap up

Users with the system administrator role can create an interaction wrap up configuration for the desired communication channel. Creating a configuration automatically enables the feature and the Wrap Up state for interactions that match the configuration settings.

The interaction wrap up configuration includes the following information:

- The selected communication channel.
- Additional conditions that apply to the interaction records included in the configuration.
- Whether wrap up is automatically ended by the system and, if automatically ended the duration of the wrap up period.
- Whether a countdown timer that displays the wrap up duration is shown to agents in CSM Configurable Workspace.

For more information, see Create an interaction wrap-up configuration.

Starting and ending a wrap up

The wrap up period begins when either the agent or the customer ends a conversation. Ending the wrap up period can be performed manually by the agent or automatically by the system.

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For more information, see Interaction wrap up.

Advanced Knowledge Editor

The Knowledge Center article editor has editing tools that help in formatting knowledge article content such as text, images, and media.

> **Note:** To enable the advanced Knowledge Center article editor layout, navigate to **Knowledge Center Workspace** > **Home** > **Knowledge Management Properties** > **Knowledge Center Properties** and turn on the **Enable new ECE editor system wide** toggle switch.

The toolbar within the article editor contains an array of icons that enable you to edit and format the text content of your knowledge article. You can use the editor to also add images, links, audio, and video to the knowledge article. You can also use Now Assist to create or enhance knowledge article content from within the Knowledge Center article editor.

For more information on the Knowledge Center article editor, see Knowledge Center article editor.

You can use the Article Optimization tool to scan your knowledge articles and get instant, actionable feedback. For more information, see Knowledge Center Article Optimization.

Agent Workspace for HR Case Management reference

Reference topics provide additional information about Agent Workspace for HR Case Management components and forms.

Create a new case form

The Create a new case form allows you to create a new case in Agent Workspace for HR Case Management.

Create a new case form

Field	Description
COE	Select the **Center of Excellence** associated with the HR case you are creating. Selecting a COE filters the choices for HR service. For more information, see HR Centers of Excellence data model. **Note:** You can also select an HR service first and the associated COE automatically populates.
HR Service	The HR service based on the COE selected or what you select based on communication with the employee request. What HR services are available to an employee filter by: • COE selected. • HR criteria for the **Subject person** based on the HR service configuration.

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Create a new case form (continued)

Field	Description
	Limit services filter on the **Case Creation Configuration** form. If the HR service field is empty, ensure that you did not remove the Opened for field.
HR service description	Description of the HR service selected in the **HR Service** field. For more information on configuring the HR service description, see Configure an HR service.
Opened for	The employee who the case is created for. This person can be different than the subject person. For example, it could be the subject person's manager.
Subject person	The recipient/beneficiary of the HR service fulfilled through the HR Case. **Note:** Advanced reference qualifiers on a reference field is not supported in the case creation configuration page. When the limit user search filter is applied to the employee search, it will not be applied to **Opened for** and **Subject person**.
Work notes	Information related to the case that can help other HR agents. Work notes are not visible to the Opened for person.

Page Configurations reference

A description of the page configuration settings in Agent Workspace for HR Case Management.

Configuration settings

Property	Description
Record	
Minimum input for adhoc approval user search	Minimum number of alphanumeric values required to initiate a search in the **Add an approval** pop-up.
Timeline for ER cases	Option to configure the display of case timeline on record page. ER (Employee Relations) agents use case timelines to track ER cases. To preview your configured setting before applying it on the case, select **Preview**.
Case tab title field	Tab title displayed for each HR case.

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Configuration settings (continued)

Property	Description
	Note: If the **Case tab title field** isn't specified, the sn_hr_core_case property is applied for all associated extensions. To preview your configured setting before applying it on the case, click **Preview**.
Playbook card configuration	Toggle to determine the playbook card configuration table depending on versions installed. To preview your configured setting before applying it on the case, select **Preview**.
Manager email template ID	Sys_id of the email template displayed, when the manager's email ID is selected from the manager name's pop over in the **At a Glance** sidebar.
Copy case attributes	Option to edit attributes that are auto- populated when copying a case.
Contextual side panel	
Sidebar tabs visibility	List of tables associated with the sidebar tabs in Contextual Side Panel. To hide a sidebar tab from the Contextual Side Panel, remove its corresponding table entry from JSON file.
At a glance	
Cases limit	Maximum number of recent cases displayed in the **At a Glance** panel. To preview your configured setting before applying it on the case form, select **Preview**.
Manager fields for pop over	Fields displayed in the pop over when the manager's name is selected from the **At a Glance** sidebar. To preview your configured setting before applying it on the case form, click **Preview**.
User field	Field-value pairs that determine what user is displayed in the **At a Glance** panel. To preview your configured setting before applying it on the case form, select **Preview**.
Update employee info	Option to navigate to configure settings in HR profile form. This option contains information related to the employee in the **At a Glance** panel. To preview your configured setting before applying it on the case form, select **Preview**.
Agent assist	
Agent assist configuration	List of table names and sys_id of the associated agent assist configuration record.

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Configuration settings (continued)

Property	Description
	Note: A sys_id is a unique 32-character GUID (Globally Unique ID), that identifies each record in an instance. For more information, see Unique record identifier (sys_id). To preview your configured setting before applying it on the case form, select **Preview**.
Table configuration	Option to configure agent assist related search results in the Table Configurations form.
Response templates	
Response templates configuration	List of table names and sys_id of the associated response template configuration record. To preview your configured setting before applying it on the case form, select **Preview**.
Table configuration	Option to configure response templates settings in the Table Configurations form.
Fulfillment instructions	
Fulfillment instructions configuration	Option to navigate to the HR Fulfillment Instructions form to configure the Fulfillment instructions section on HR case.
Email Client Templates	
Email Client Templates configuration	Option to navigate to the Email Client Templates form to configure the Email Templates section on an HR case.
List	
List configuration ID	The sys_id of the list configuration [sys_ux_list_menu_config] record in the UX List Menu Configuration table.
Highlighted value configuration ID	Sys_id of the highlighted value configuration [sys_ux_highlighted_value_config] record in the UX Highlighter Value Configuration table.
Case creation	
Case creation employee fields	Employee fields displayed on the case creation page.
Landing page	
HR case card configurations	
High priority HR cases	Filter to determine which high priority cases are displayed in the landing page. You can also set text to be displayed when a user views records or when a list is empty.

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Configuration settings (continued)

Property	Description
Recently updated HR cases	Filter to determine which recently updated HR cases are displayed in the landing page. You can also set text to be displayed when a user views records or when a list is empty.
HR cases SLA at risk	Filter to determine what high priority cases are displayed in the landing page. You can also set text to be displayed when a user views records or when a list is empty.
Announcements	Option to navigate to the Schedule Content page to configure the Announcements section in landing page.
Quick links	Option to navigate to the Schedule Content page to configure the Quick links section in landing page.
My frequently used apps	Option to navigate to the Schedule Content page to configure the My frequently used apps section in landing page.

Highlighted value condition form

Use the Highlighted value condition form to create conditions to highlight a field.

Highlighted value condition form

Field	Description
Conditions	Conditions that trigger a field to be highlighted.
Color	Color of the highlighted field.
Application	Scope of applications this highlighting pertains to.
Order	The order in which to evaluate the conditions. When you have multiple conditions for highlighting the same field, they are evaluated in order from lowest to highest.
Hide Label	Toggle to hide label name.
Label	Name for the highlighted field that shows up when the condition is met.
Show Icon	Toggle to display the leading bullet when a field is highlighted. Example - 
Value Override	Text that replaces the field values from the table. If you don't supply a Value Override, Workspace highlights the field value from the table. If you supply a value, Workspace replaces the field value with your text and highlights that. Example - 

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Bulk case request form

The bulk case request form provides information to create a bulk case request to enable the creation of the same type of HR cases.

Bulk Case Request form

Field	Description
Number	Automatically generated bulk case request number.
Name	Name describing the bulk case request.
HR service	HR service associated with the bulk case request.
Status	Status of the bulk case request. The bulk case request statuses are: • Draft - The default status. • Ready - A user segment group has been created for the bulk case request. • In progress - The request is in the bulk case request creation process.
Create parent case	Option to create a parent case that is associated with the bulk cases.
Opened by	Name of the user creating the bulk case request.
Selected user count	Number of users selected for the bulk case request. The value of this field is taken from the user selection field while creating a user group segment.
Requested time	Date and time your bulk case request was submitted to create cases. The value of this field is auto-populated upon creation of the user segment group.

HR Service Delivery Playbook

Currently, HR Service Delivery Playbook offers you a single pane to view and work all tasks and steps required for resolving a lifecycle event case.

Important:

- HR Service Delivery Agent Workspace (Classic) is now deprecated and no longer supported or available for new activation. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
- If you are an existing user of HR Service Delivery Agent Workspace (Classic), you can migrate to the Agent Workspace for HR Case Management (Configurable) for enhanced features and capabilities. See Migration Guidelines.

Note: Only lifecycle event cases are supported at this time.

Having all case information in a single pane allows you to quickly and easily decide what your top priorities are. Having top priorities allows you to:

- View all in-progress steps across different departments so you don't waste time searching and opening different forms.
- View all completed actions.
- Easily and quickly see what you should do next.

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Lifecycle event cases

Because there can be multiple activity sets in a lifecycle event case that also contain multiple activities, being able to view all aspects is crucial to an HR agent.

Using an accordion button, you can expand or collapse activity sets to view the activities within.

Within an activity set, you can view all tasks, state, owners, and have the ability to take action.

Note: For more information about lifecycle events, see Lifecyle events for enterprise.

Exploring HR Service Delivery Playbook

Use HR Service Delivery Agent Workspace to manage lifecycle event cases.

HR Agent Workspace case form with Playbook

When Playbook is activated with HR Service Delivery Agent Workspace, the **Playbook** tab appears in the Related Items menu.

Playbook Header

The Playbook Header shows the title of an activity set.

Note: For more information on lifecycle event structure, see Configure a lifecycle event.

Stage panel

Along the left side of the Playbook form, you will see the stage panel that shows the lifecycle event and each activity set. Below each activity set shows a the number of activities completed and a status circle. A check inside the circle indicates a completed activity set.

A check mark inside the Playbook Header indicates that the activity set is complete.

You can quickly see how many activities there are for an activity set and how many are completed.

In the example, the activity set Start onboarding has a total of nine activities with one completed (1 of 9).

Activity stream

Click on an activity set in the stage panel to view all activities within the activity set.

HR card

You can drill into an activity from the activity stream by clicking on an activity to view details about case or task.

The HR case opens in a separate widow and tab.

HR card details

Click the activity and the **Assigned to**, **HR service**, **Opened for**, **Subject person**, **State**, and attachments appear.

At the top, right of an HR Playbook card are a series of icons.

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The first icon on the left provides the state of the HR case or task. Hovering over shows details of the SLA.

Click the **Add note or comment** () icon to add comments or notes related to the activity.

To view comments or notes, click the **See activity** button.

Click the Open task () icon to view the details of the HR case or task. A new tab with the HR case or tab opens.

Click the Minimize task () icon to close the details of the HR case or task.

The other areas of Playbook are covered in .

Setting up HR Service Delivery Playbook

Set up HR Service Delivery Playbook so that your agents can easily manage, track, and lifecycle event cases.

Activation

To activate Playbook for HR, you must go to the ServiceNow Store to make it available on your instance.

Activate the following plugins:

Playbook Experience Core [com.glide.playbook_experience.config].

The next two (2) applications are obtained from the store:

- Playbook Experience [sn_playbook_exp]
- Playbook Experience Components [now_playbook_exp]

For more information, see Install a ServiceNow Store application .

HR cards

The Playbook tab under HR Service Delivery Agent Workspace has HR cards.

HR cards represent each activity in the activity set which could represent various records such as HR tasks, HR cases, requests, incidents, approvals, and more.

Below is an example of an HR card showing an HR task record.

- The Verify Work Authorization card has an HR task type = Mark When Complete condition.
- Each activity shows an HR task, case, request, and others. The activities look at the HR Playbook Card Configuration table to match the lowest order record.
- The HR Playbook Card Configuration can have filters to determine what values to render.
- Use HR Playbook Card Configuration to configure cards.
- For more information, see Configure HR Service Delivery playbook card.

As an HR administrator, use this to configure how each playbook looks in HR Service Delivery Playbook for different types of records (HR case, task, and others). Different record types have different relevant information to show.

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The base system provides 19 records.

Note: For more information on playbook configuration, see Set up a playbook.

Configure HR Service Delivery playbook card

Use Playbook Card Configuration to view and manage what appears for each card in an activity set.

Before you begin

Role required: sn_hr_ws.admin
Each activity attempts to show a record (HR task, HR case, request, and so on) and goes through the card configuration and attempts to match to the lowest ordered record in the table. For example, the 'Verify Work Authorization' is a 'mark when complete' card that the base system provides.

The properties from the card configuration record are filled in from the record (HR task, HR case, request, and so on).

Note: For Classic HR Service Delivery Agent Workspace and Agent Workspace for HR Case Management, there are two separate default card configurations and activity overrides. The property *sn_hr_agent_ws.use_uib_playbook_card_config* (default value = false) decides which card configuration is to be used for HR Service Delivery Playbook when you have each Agent Workspace installed. By default, the Classic card configuration will be selected in the card configuration.

Procedure

1. Navigate to **All** > **HR Administration** > **Playbook Card Configuration**.
2. Fill in the fields on the form.

HR Playbook Card Configuration form

Field	Description
Name	The name that identifies the HR Playbook Card Configuration.
Table	The record type of the configuration. Determines what card appears for each activity within an activity set (lane). Also determines what properties the card uses.
Condition	The conditions that determine if the type values render to an HR Playbook card. **Note:** When defining conditions like case sensitivity or null values, see APIGlideFilter - Scoped, Global.
Activity type	The activity type from a lifecycle event activity. Activity types can be approvals, employee activities, fulfiller activities, notifications, and more.

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Field	Description
	Note: For more information, see Configure the supporting components for a lifecycle event.
Active	Indicates if the record is active and available for use.
Order	The order in which the activity attempts to match this record. The lowest values are evaluated first.

The Type Values section determines what appears on each card.

Type Values

Field	Description
Associated table	Not applicable at this time.
Footer	Information you want to appear in the footer of an HR Playbook card. Enter text or click the pill picker icon to display references you can select from to automate the placement of information.
Associated record	Not applicable at this time.
Icon	Displays an icon that appears in the upper, left-side of the card. Click the Lookup using list icon to select the icon you want to appear.
Description	Select the pill picker icon to display a description on the card. **Note:** This is not a free-form field, you must select from the available
Attachments read only	Check to indicate existing attachments can only be read. **Note:** This is a read only field and not for adding attachments to the activity. See the **Attachment source** field.
Title	The title of the card. You can enter free-form text or select from the list after clicking the pill picker icon.
Form fields	Displays a vertical column of fields that render below the row of record fields.

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Field	Description
	Note: The fields are editable when at least one button on the card says **Form fields required**. You can enter comma separated text or select fields by clicking the pill picker icon  . The fields you select appear as a column on the left-side of the card.
Show SLA	Check to indicate you want the SLA icon to appear at the top, right-side of the card. The icon shows the state of the SLA.
Tagline	Enter or select information that appears at the top of the card above the title.
Attachment source	Use to allow uploading of attachments. Selecting associated_record allows the user to upload an attachment from the card.
Record fields	Fields you want to appear across the upper section of the card. Enter comma separated list of fields you want to appear on the card or click the xx icon to select references.
Show Checklist	Check to display the checklist from the activity. Users can check off tasks the same way they do on the case form.
Assigned to	Identifies the **Assigned to** agent. You can enter free-form text or select from the references after clicking the pill picker icon  . The name appears next to the title.
Form View	Works with the **Form fields** and allows you to define an entire section you want to appear on the card.

3. Click **Submit** or **Update**.

HR Playbook Experience

Use Playbook Experiences to select the playbook your company uses.

The base HR Service Delivery Playbook contains a pre-configured playbook experience.

A Playbook experience is tied to Playbook Configurations and Playbook Activity Overrides.

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Playbook Configuration

- Decide if you want the activity state icon on the card.
- Determine what fields to use in the Playbook filter.
- Determine the maximum number of form fields allowed on a card before a model is used.
- Define the conditions to display on the card for the SLA time icon.

Playbook Experiences

Controls the playbook user experience.

- Sets up display and activity filters.
- Provides SLA integration.
- Provides access control.

Activity Overrides

The base system uses activity overrides to show the list card for requests and the default record card for collapsing and expanding tasks. Activity overrides are also for expanding cards assigned to the user, overdue, SLA breached, and so on that agents see by default.

Activity overrides control the logic and conditions for cards that are expanded and cards that are collapsed.

Enables you to override three (3) defaults for each card (from the **What to override** tab):

- The type of card used (default card, list card, create record card, knowledge card, and so on).
- Expand state (should this card open by default when playbook loads).
- Roles Required (should you limit this card to specific roles).

Activity Actions

Defines playbook actions like add using forms, conditions, and scripts, and what buttons appear on a card. You can configure these buttons:

- Location, where the buttons appear.
- Button type and color.
- How the button is implemented (server script, client action, or a UI component modal).

Activity actions also work with displaying buttons and icons that can:

- Render a component (Add Approvers or Close Complete).
- Update the record (change its state).

To make changes to the default configurations, see Update playbook experience configurations.

Configure HR Playbook Experiences

Use Playbook Experiences to modify the default playbook experience configurations.

Before you begin

Role required: sn_hr_ws.admin

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Note: To make changes, clone the HR Playbook Experience record first.

Procedure

1. Navigate to **All** > **Playbook Experience** > **Playbook Experiences**.
2. Select **HR Playbook**.
3. Select the **Playbook Configurations** tab and select **true**.
   For information on the form fields, see Update playbook experience configurations.
4. Select the **Playbook Activity Overrides** tab and an activity override.
   For information on the form fields, see Set up playbook activity overrides.
5. After editing or creating, click **Update** or **Submit**.

Configure HR Playbook activity overrides

Create optional activity overrides for the default behavior of activities in your HR playbook.

Before you begin

Role required: sn_hr_ws.admin

Note: Activity overrides are affected by the system property *sn_hr_agent_ws.use_uib_playbook_card_config*.

If this system property is true, Agent Workspace for HR Case Management Playbook Card Configurations are used, and it's activity overrides will apply. If this system property is false, which is the default value, Classic HR Service Delivery Agent Workspace Playbook Card Configurations are used, and it's activity overrides will apply.

You can also access Playbook Activity Overrides from Playbook Experiences. See Configure HR Playbook Experiences.

Procedure

1. Navigate to **All** > **Playbook Experience** > **Activity Overrides**.
2. Select an activity override or **New**.
   For information on the form fields, see Set up playbook activity overrides.
3. After editing or creating, click **Update** or **Submit**.

Configure HR Playbook activity actions

Use playbook actions to enable users to complete (add buttons and lists) and skip activities.

Before you begin

Role required: sn_hr_ws.admin

Procedure

1. Navigate to **All** > **Playbook Experience** > **Activity Actions**.
2. Enter or edit the form fields.
   For information on the form fields, see Customize Playbook actions.
3. After editing or creating, click **Update** or **Submit**.

Using HR Service Delivery Playbook

Currently, HR Service Delivery Playbook is only available for use with lifecycle event HR cases.

Playbook shows as a tab on the HR Agent Workspace form after displaying an LE case.

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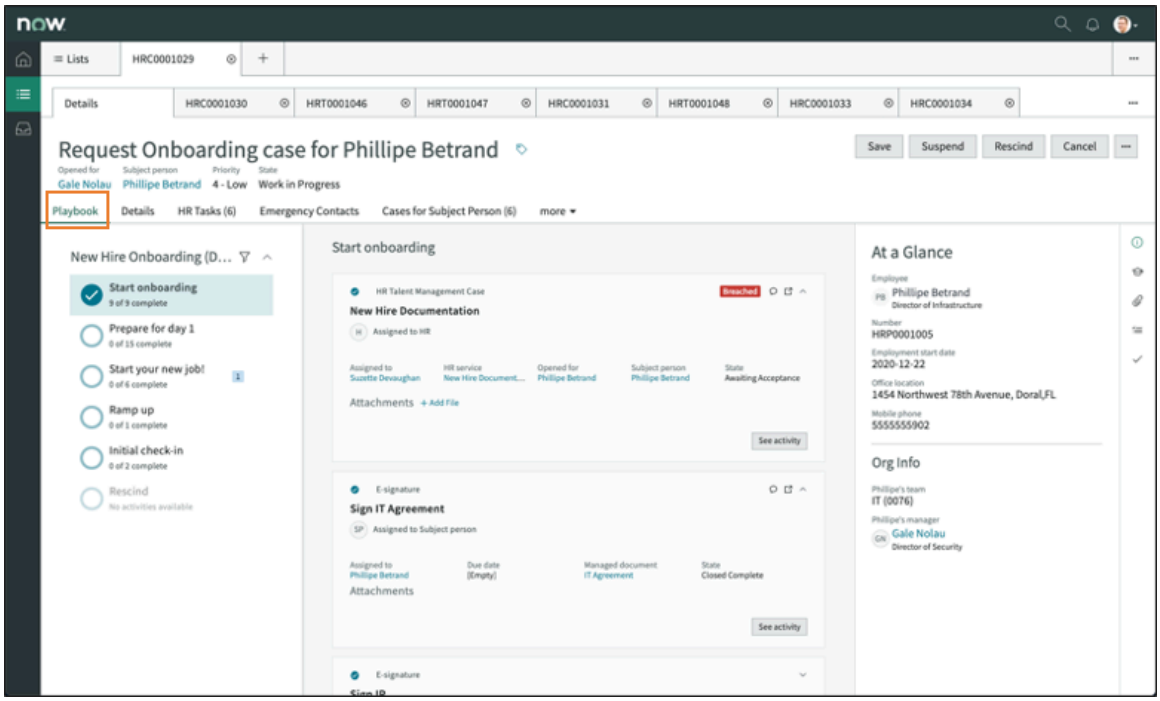
Note: The Playbook tab only appears after the HR case has moved to **Ready** or **Work in Progress**. This triggers the lifecycle event and data appears for all launched activities.



Selecting the Playbook tab allows you to view and work all lifecycle event activities and their child tasks in a single pane.

Note: Tasks that are created ad-hoc and not part of the workflow do not appear in the tab, but may be accessible in regular related lists.

Lifecycle event

The title of the lifecycle event is at the top below the **Playbook** tab in the stage panel.

Activity sets

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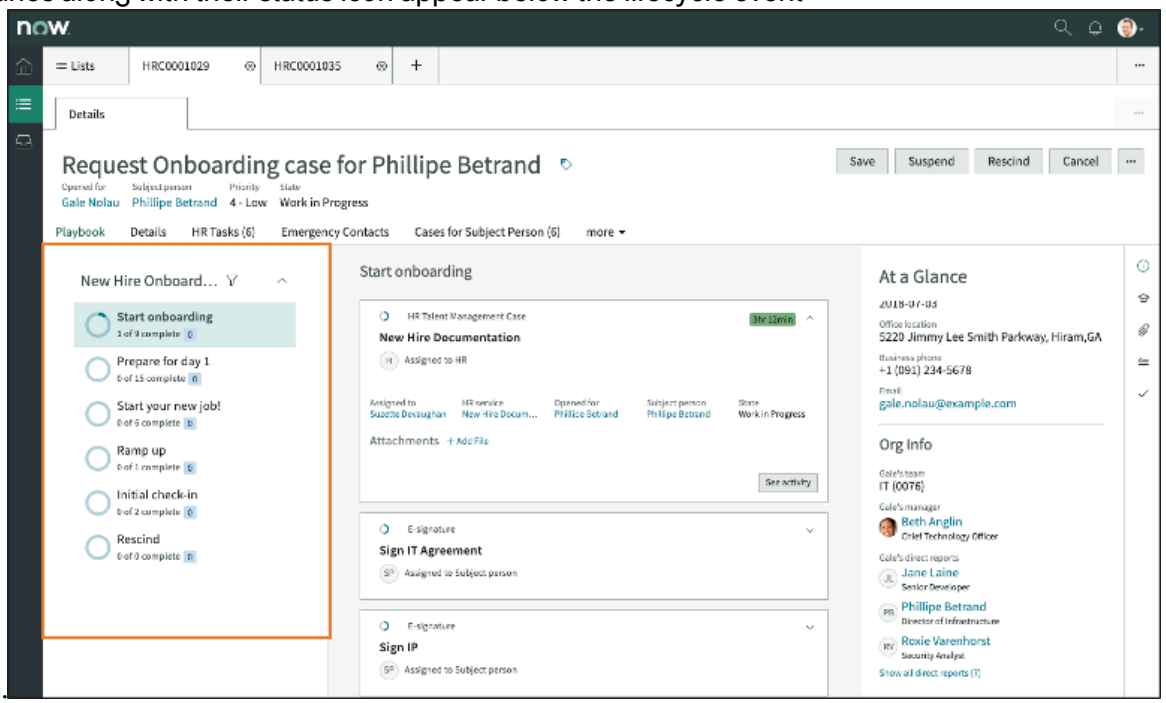
The list of lanes along with their status icon appear below the lifecycle event description.

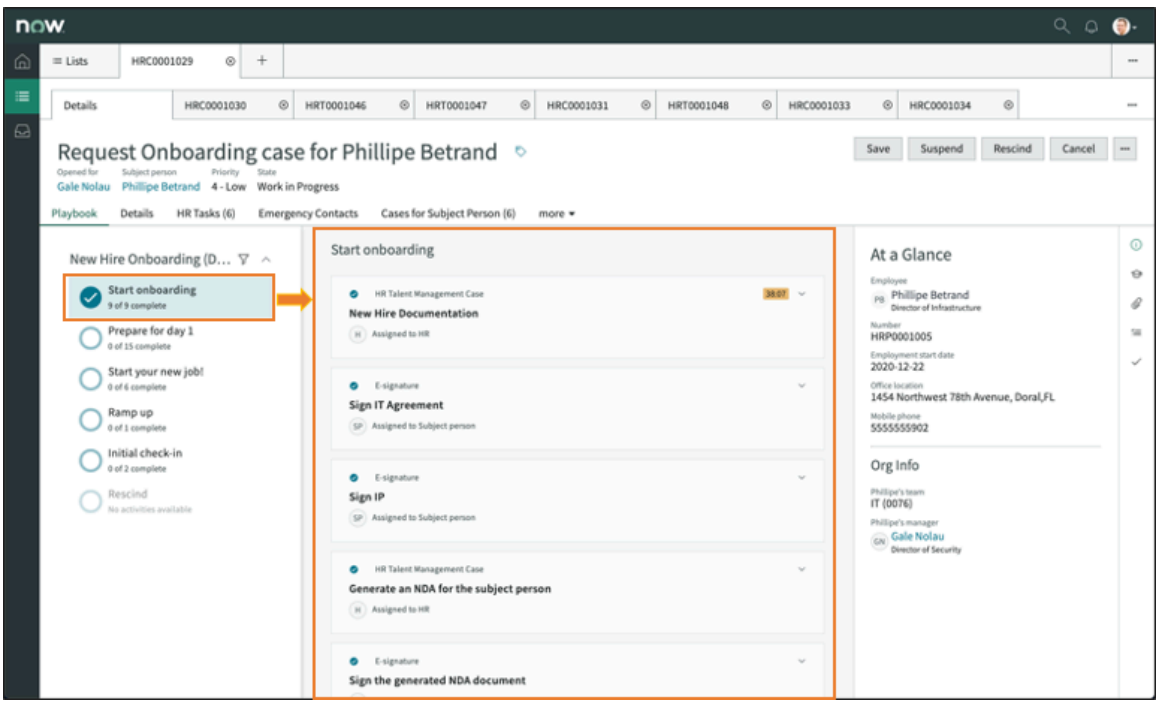


Under the New Hire Onboarding (Demo) lifecycle event are five (5) activity sets:

- Start onboarding
- Prepare for day 1
- Start your new job!
- Ramp up
- Initial check-in

Activities

Click on an activity set to view the associated activities.



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HR Playbook add a note or comment

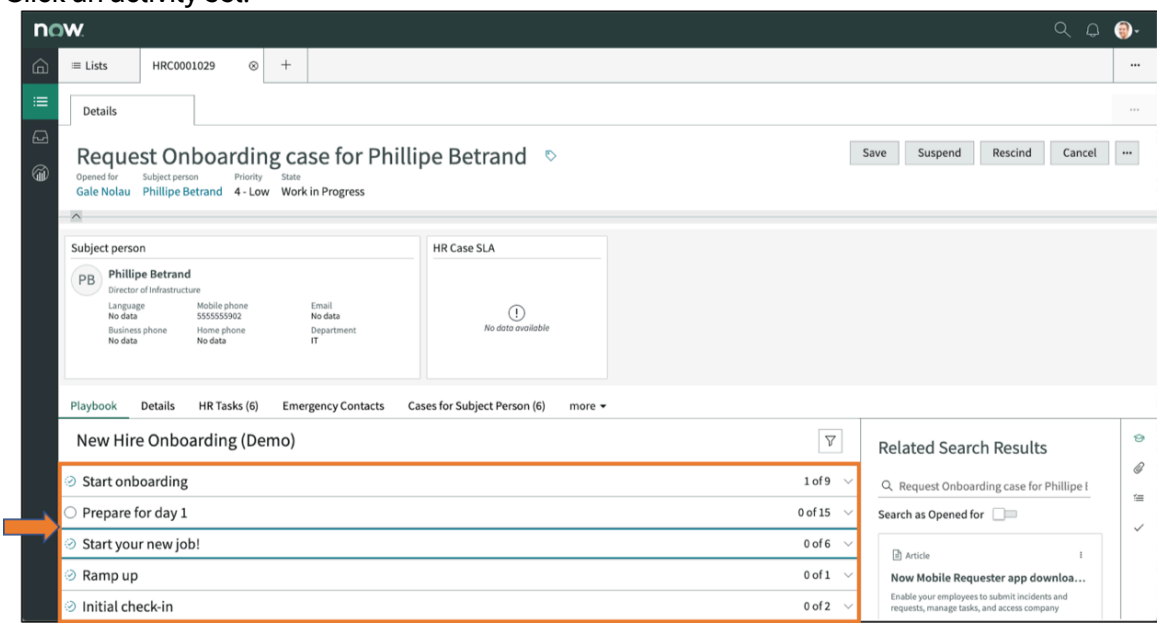
You can add a work note or comment to an HR lifecycle event case from Playbook.

Before you begin

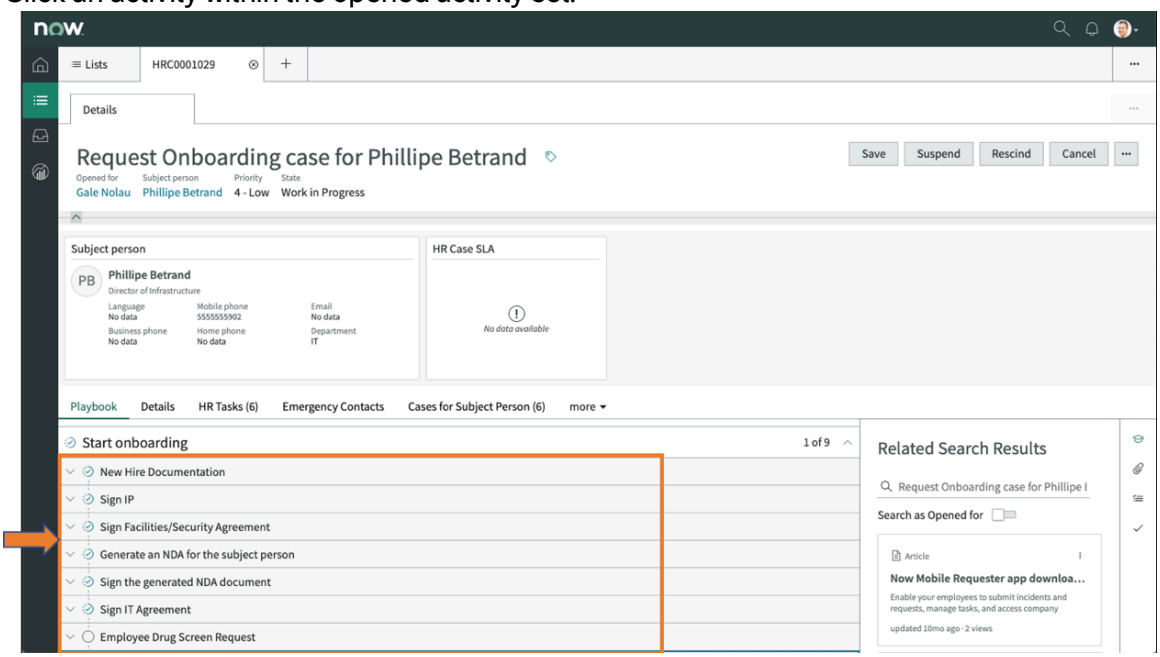
Role required: sn_hr_le.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select a lifecycle event case.
3. Click an activity set.



4. Click an activity within the opened activity set.



5. Click the **Add note or comment** icon .

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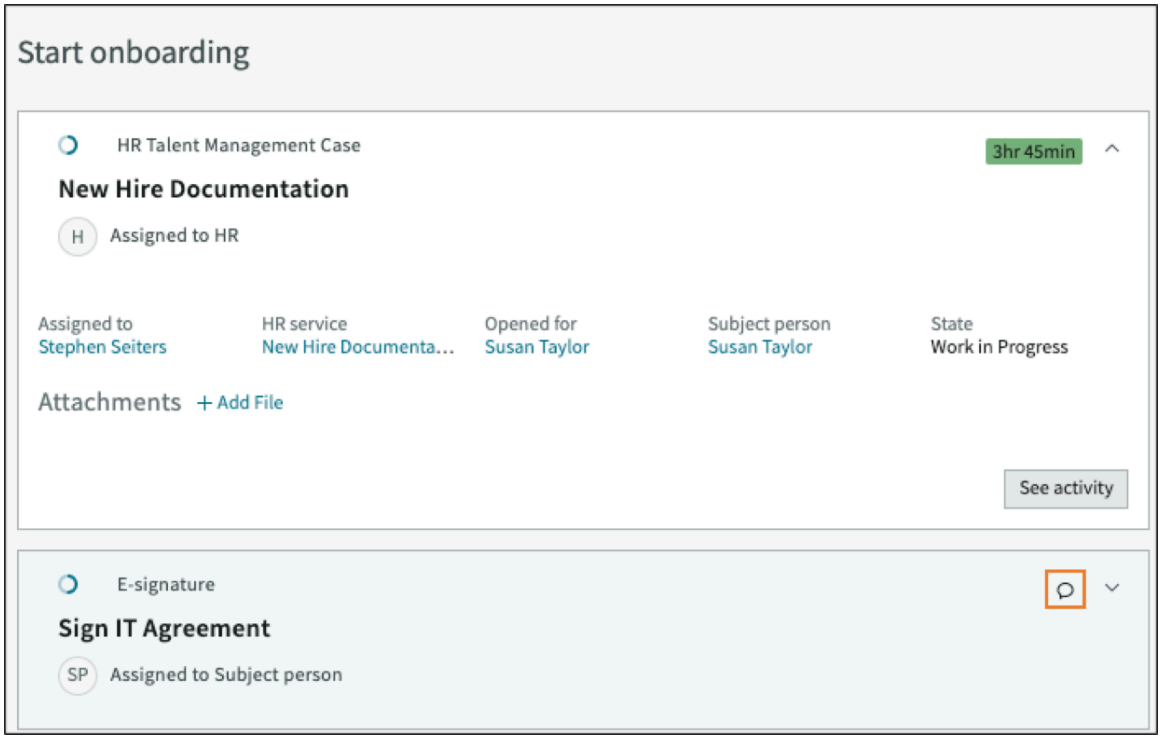
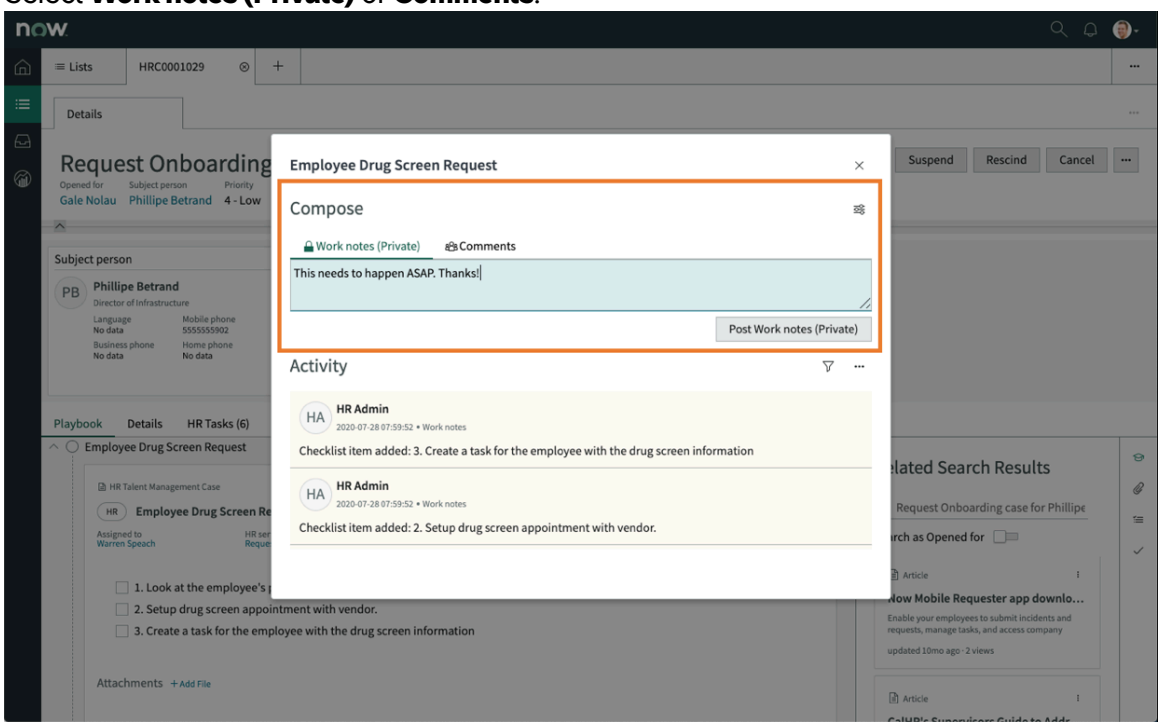


6. Select **Work notes (Private)** or **Comments**.



7. Enter text and click **Post Work notes (Private)** or **Post Comments**.
8. Click the **Filter by** icon to filter by activities.

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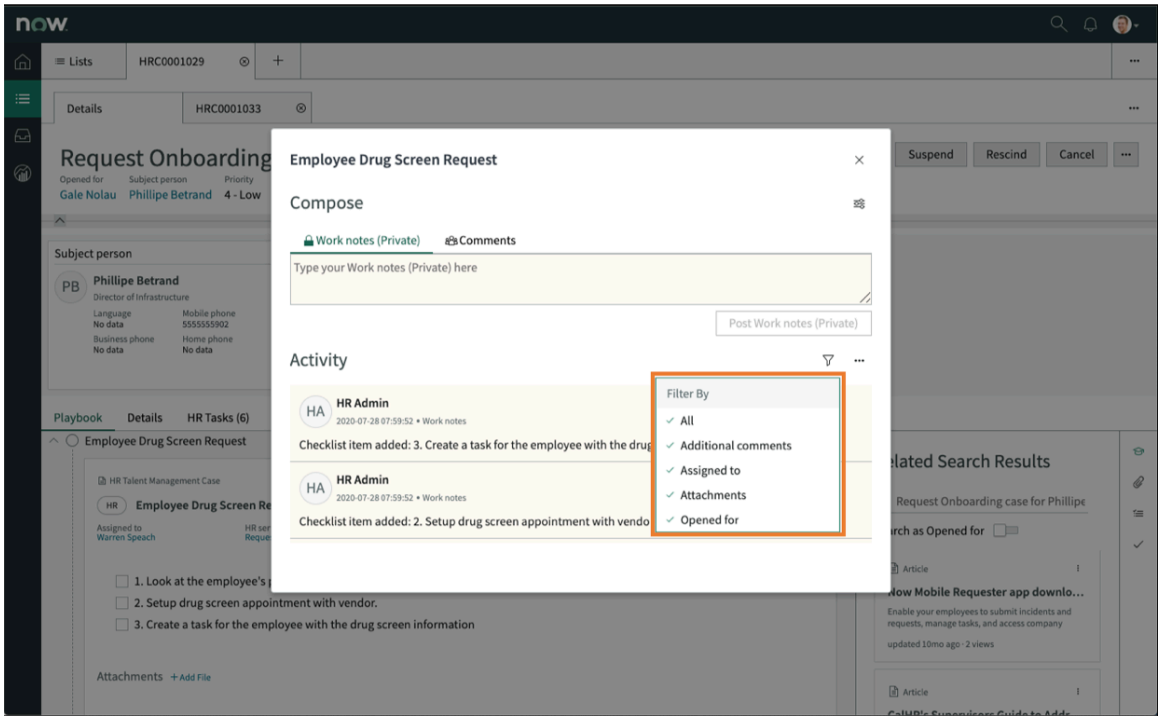
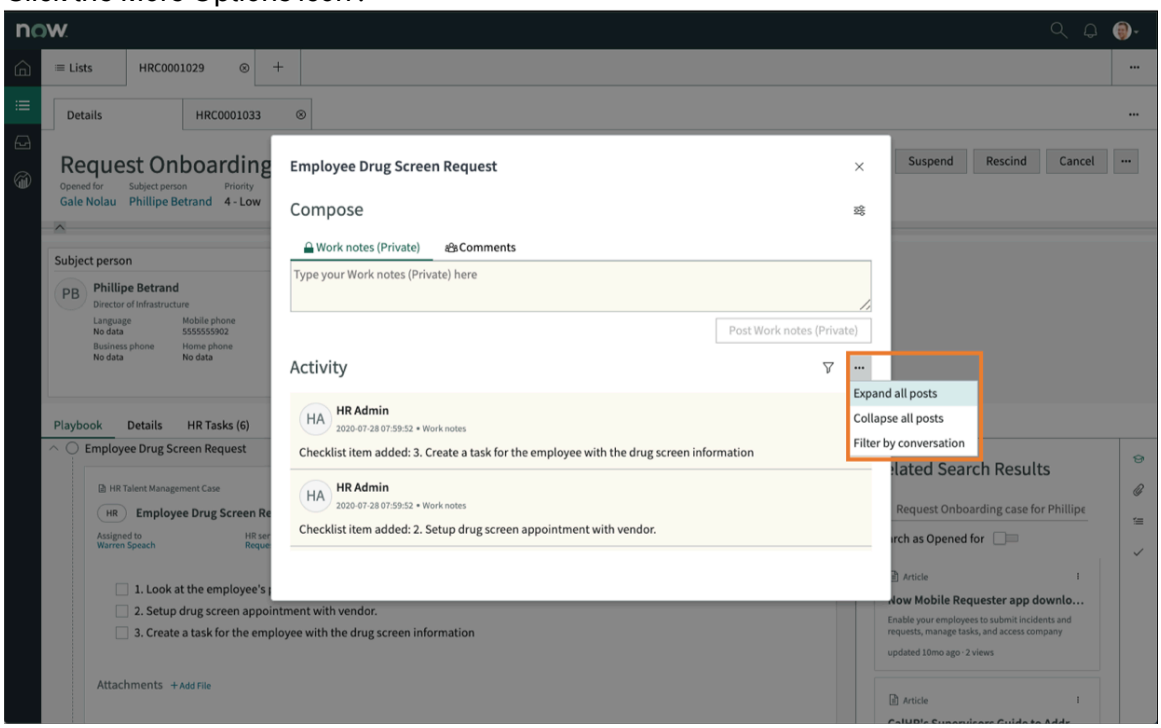


9. Check the filters you want to show activities under.
10. Click the More Options icon .



11. Select the filters you want to use to show activities by.

HR Playbook open a case or a task

You can open a sub-case or task on an HR lifecycle event case from Playbook.

Before you begin

Role required: sn_hr_le.case_writer

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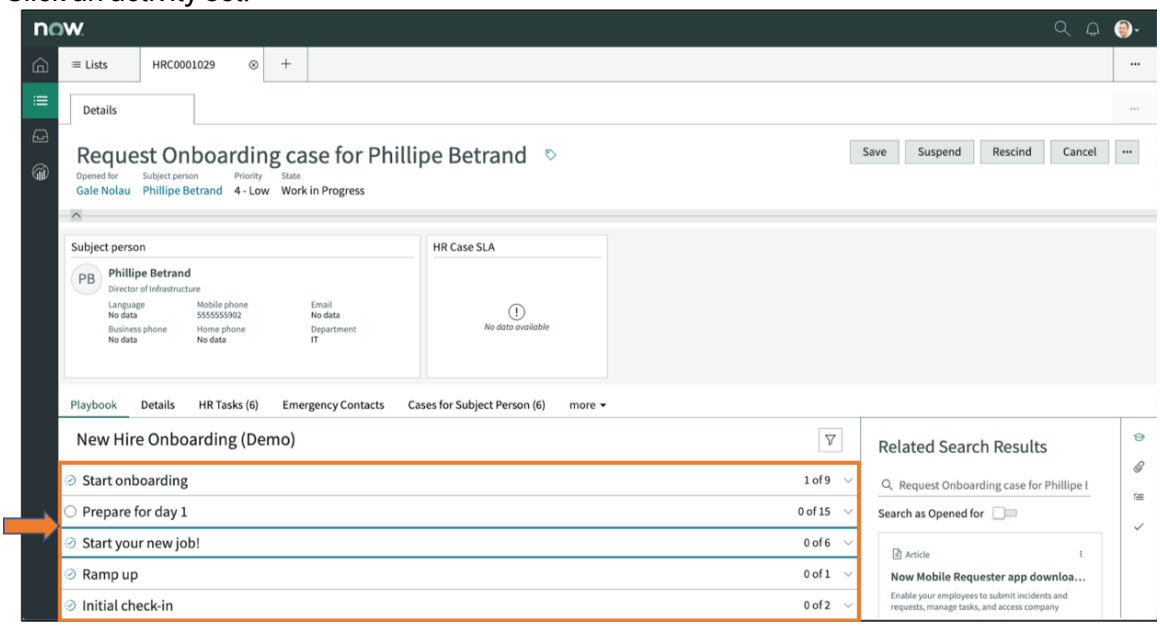
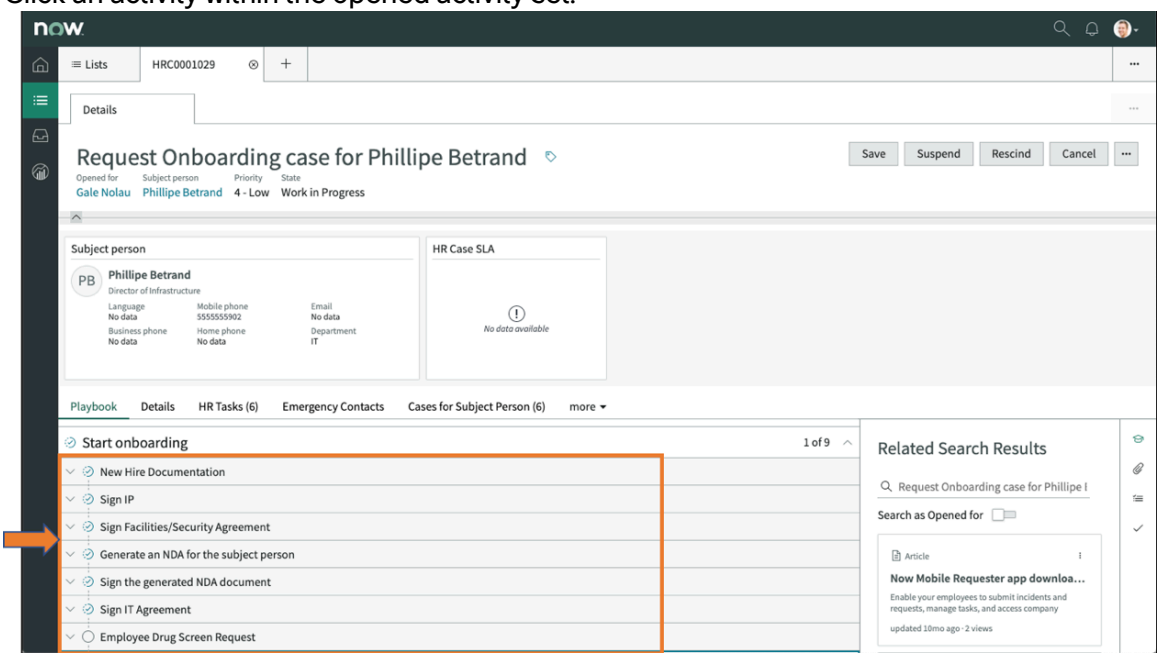
Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select a lifecycle event case.
3. Click an activity set.



4. Click an activity within the opened activity set.



5. Click the **Open task** icon  .

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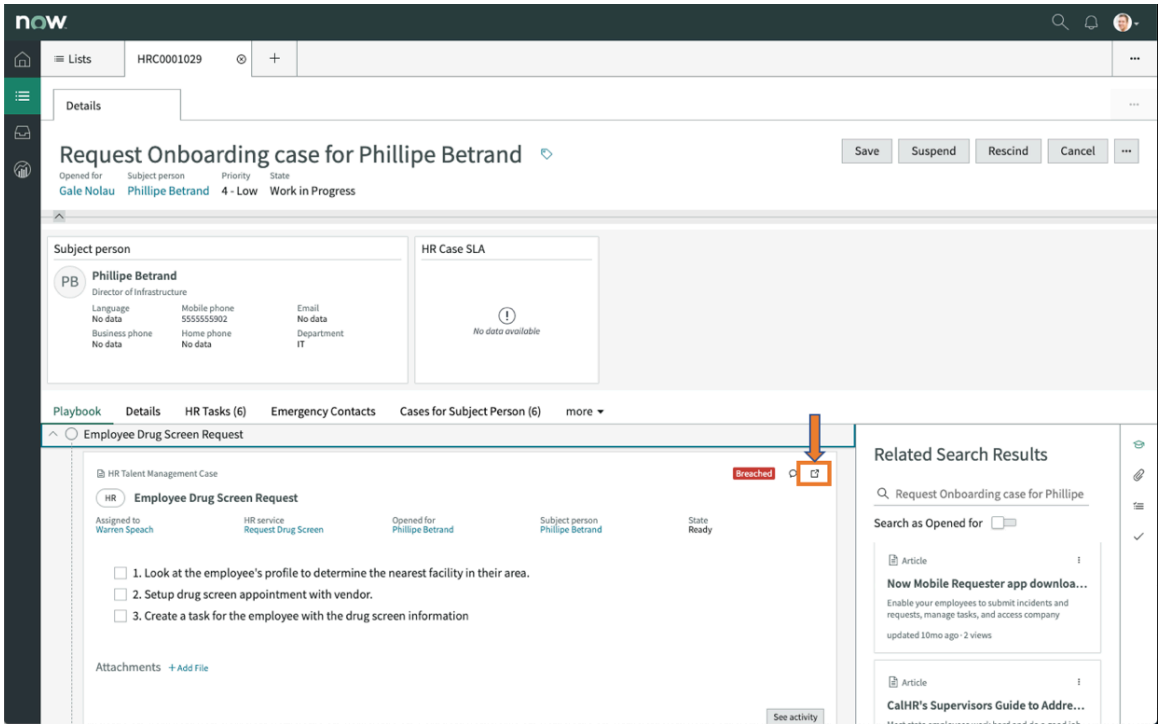
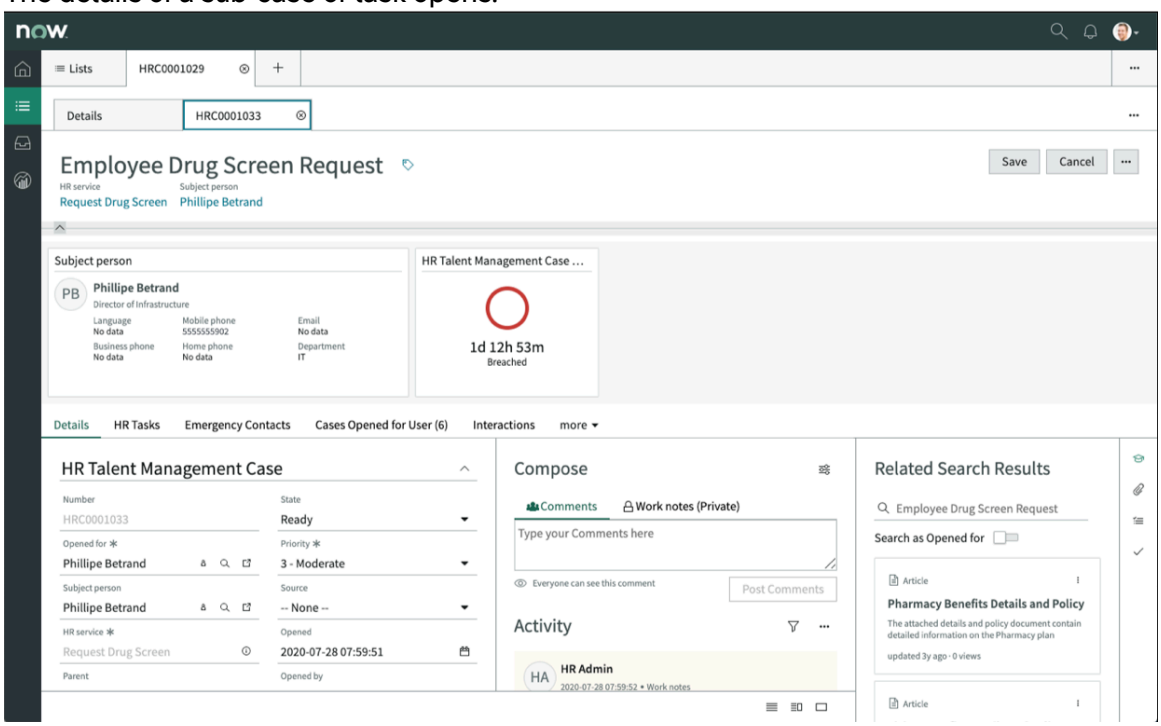


6. The details of a sub-case or task opens.



7. You can make edits and click **Save**.
8. To return to Playbook, click the **Details** tab.

HR Playbook see activity

You can view the activity stream in a modal from HR Playbook.

Before you begin

Role required: sn_hr_le.case_writer

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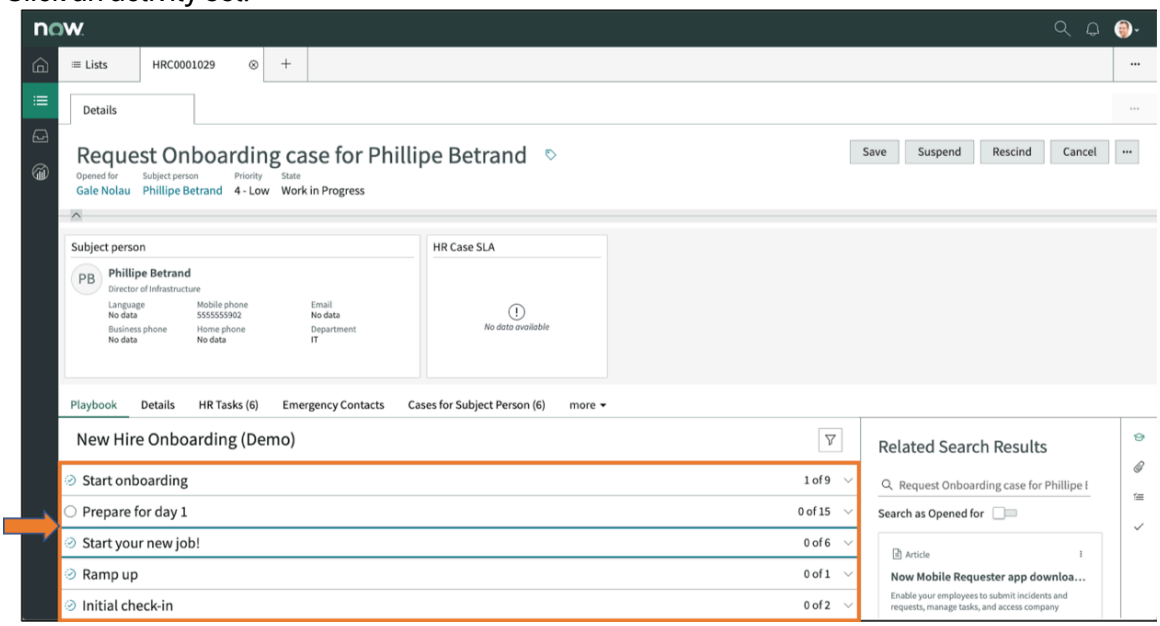
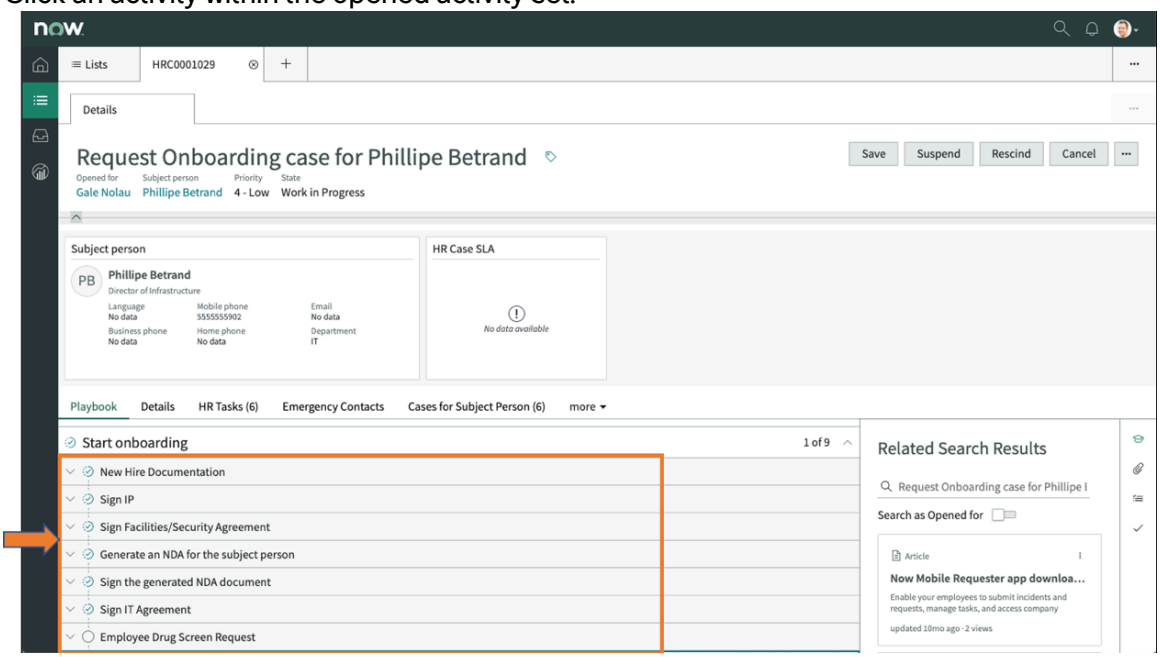
Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select a lifecycle event case.
3. Click an activity set.



4. Click an activity within the opened activity set.



5. Click the **See activity** button.

> **Note:** Only agents with access to the case card and not assigned to the case can see this button. The Assigned to agent does not see this button.

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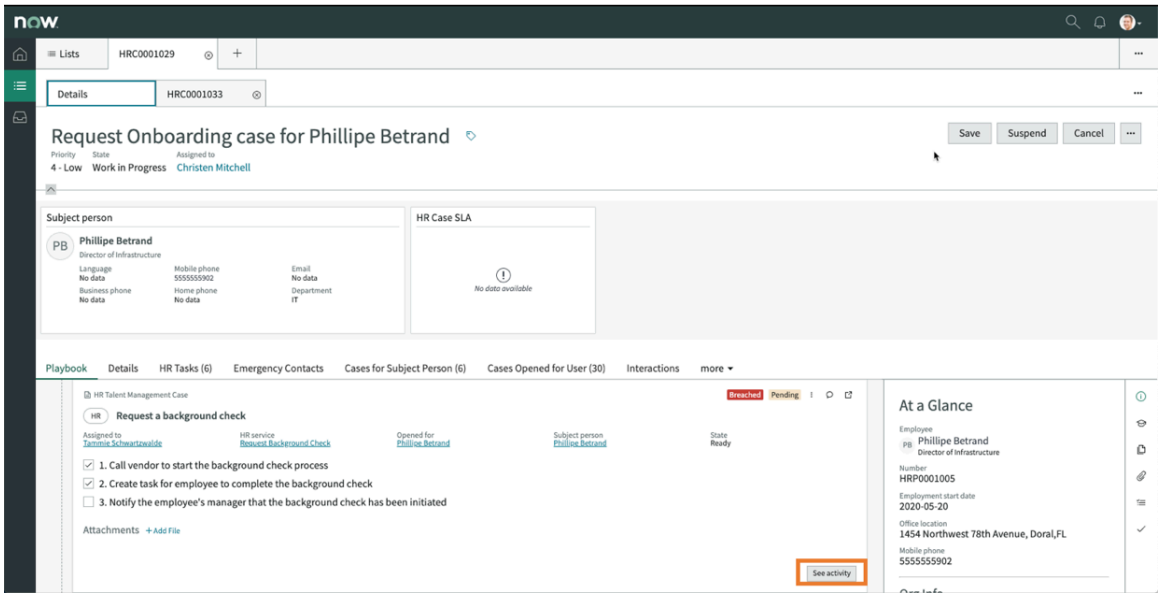
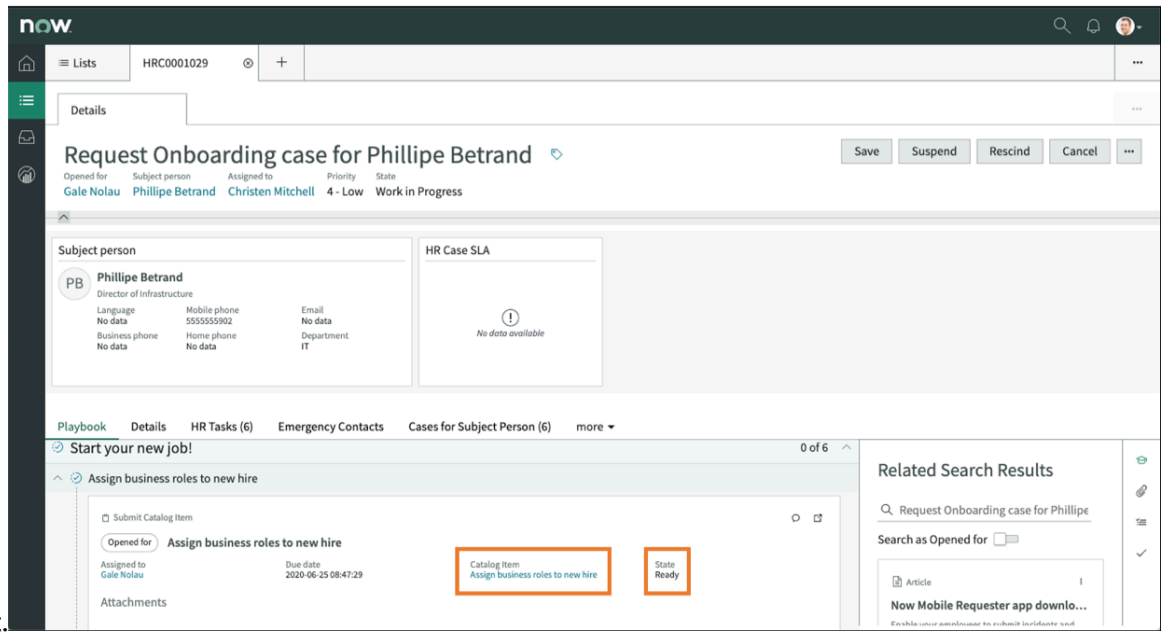


Activities can have links to training, videos, or catalog items. The state of the activity also appears to the right.



Note: Clicking the Catalog Item link opens the general catalog page.

HR Playbook add attachment

Depending on the activity, you can add attachments from Playbook.

Before you begin

Role required: sn_hr_le.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select a lifecycle event case.
3. Click an activity set.

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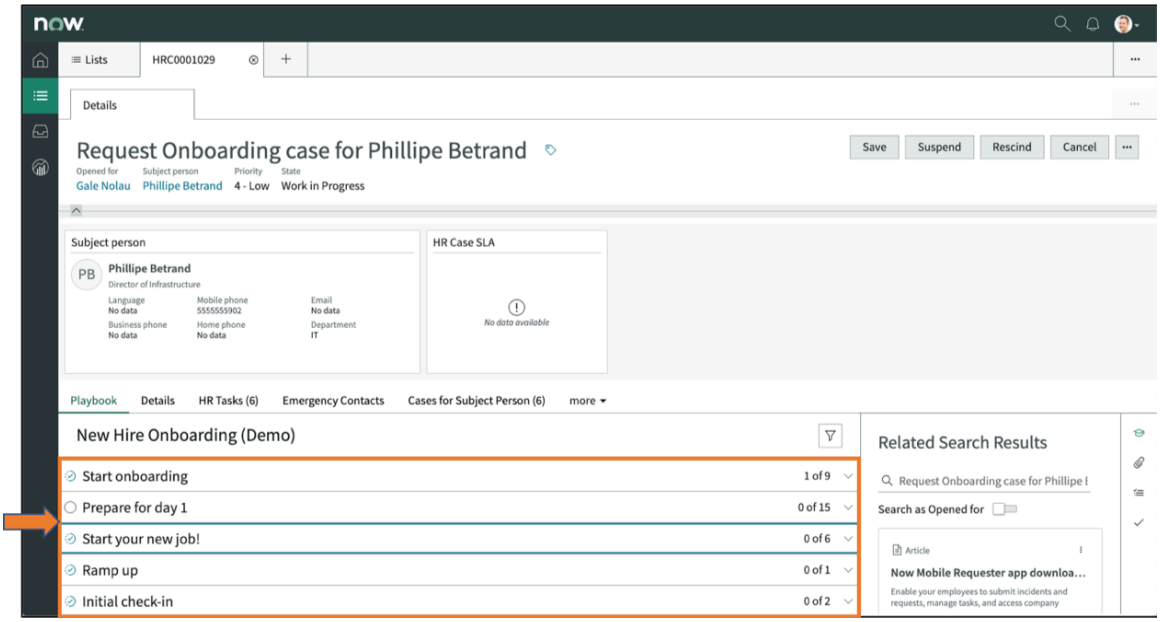
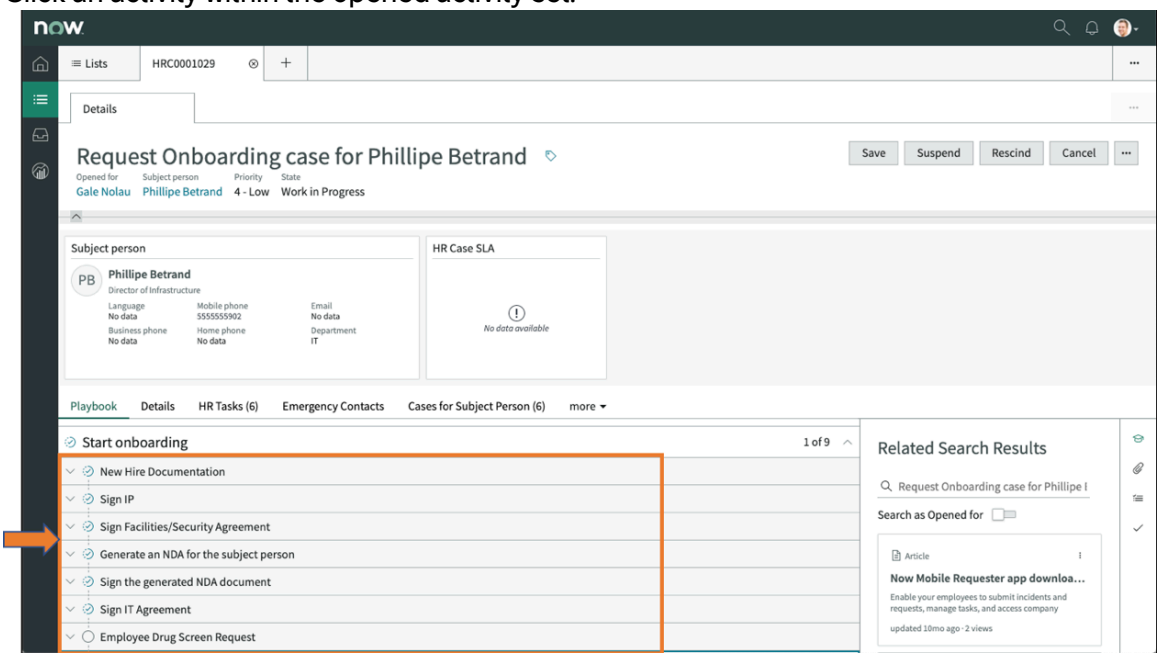


4. Click an activity within the opened activity set.



5. Click **+Add File**.
6. Select the file you want to up load and click **Open**.

HR Playbook rescind an activity

You can cancel and revert work done in a lifecycle event case using the rescind process.

Before you begin

Role required: sn_hr_le.case_writer
For more information, see Configure the rescind process for a lifecycle event.

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select a lifecycle event case.
3. Click **Rescind**.

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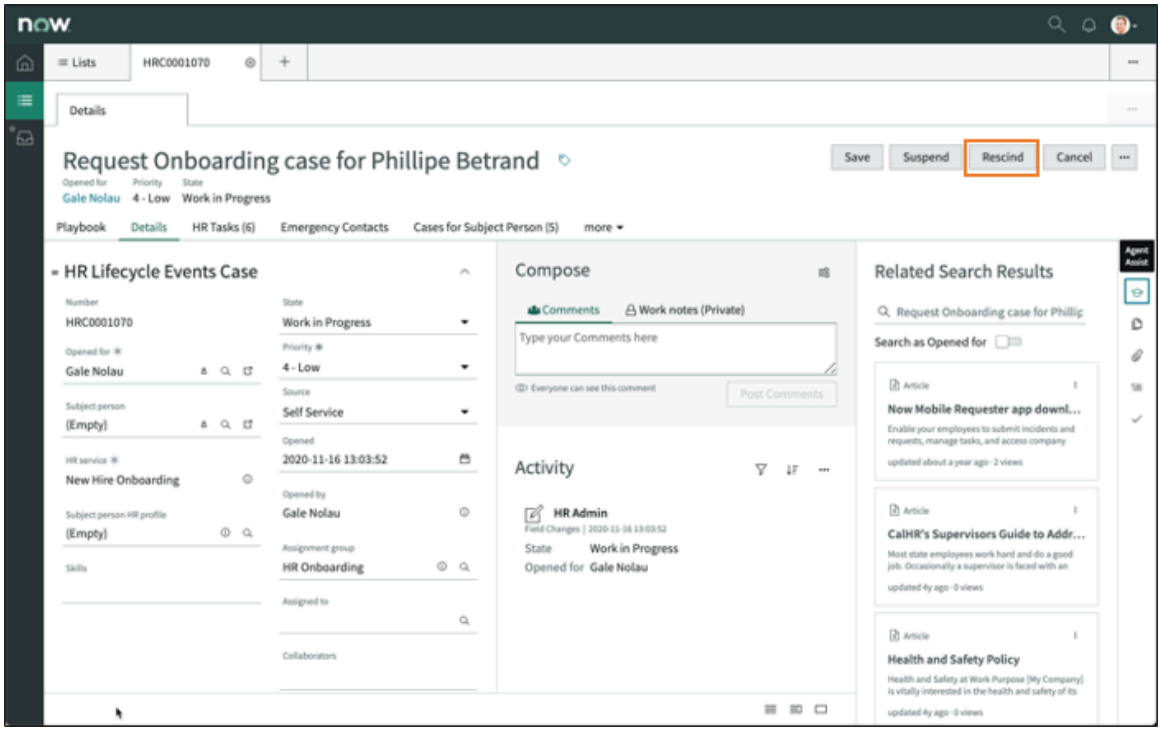


4. Enter a reason for rescinding the case.

   Note: You cannot undo a rescind, so proceed with caution.

5. Click **OK**.
   The rescind activities appear and future activity sets are cancelled.

View email sent to opened for or subject person

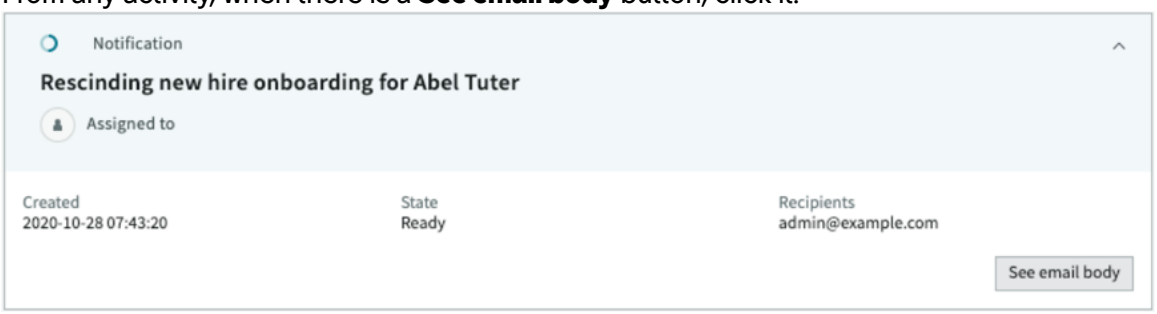
As an HR agent, you can view emails to the opened for or subject person on a lifecycle event case.

Before you begin

Role required: sn_hr_le.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Select a lifecycle event case.
3. Select an activity set.
4. From any activity, when there is a **See email body** button, click it.



5. Click the **X** at the top, right corner of the email to close it.

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HR Service Delivery Agent Workspace integration with Universal Request

With the integration of HR Service Delivery Agent Workspace and Universal Request applications, you can provide a consistent user experience for employees while creating service requests.

Important:

- HR Service Delivery Agent Workspace (Classic) is now deprecated and no longer supported or available for new activation. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.
- If you are an existing user of HR Service Delivery Agent Workspace (Classic), you can migrate to the Agent Workspace for HR Case Management (Configurable) for enhanced features and capabilities. See Migration Guidelines.

Overview

A universal request gets created when an employee clicks the **Request help** option in Employee Center. A universal request routing agent analyses the issue (as HR department related) and creates an HR case from that universal request. After the case gets resolved by an HR agent, the state of the HR case changes to **Awaiting Acceptance**. Automatically, the state of the universal request changes to **Awaiting response**. Finally, after the employee accepts the resolution, the universal request gets closed and in turn, the HR case gets closed.

At any point in time, the HR agent can route the HR case back to the universal request queue with or without resolution.

All the important details, such users who are working on the issue, inter-department transfers, and work notes, are recorded in the universal request ticket providing complete visibility to the employee who has raised the request.

Activating the necessary plugins

After you have activated the Human Resources Scoped App: Workspace (com.sn_hr_agent_workspace) and Universal Request (com.snc.universal_request) plugins, you will notice that:

- The Universal Request form has the UI action to create an HR case.
- The **Universal Request** field appears on the HR case form only when an HR case is associated with a universal request record.
- The **Transfer** button appears on the HR case form to let an HR agent route an HR case back to the universal request, another department, or service.

Create an HR case from Universal Request in HR Service Delivery Agent Workspace

Create an HR case from a universal request record to restore service to a customer as soon as possible. After creating the HR case record, you can investigate potential solutions.

Before you begin

Role required: routing_agent and sn_hr_core.case_writer

Procedure

1. Navigate to **All** > **HR Case Management** > **HR Agent Workspace**.
2. Navigate to **Universal Requests** > **All**.
3. Open the universal request record from which you want to create an HR case.

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4. Click **Create HR case**.
5. Fill in the required fields on the HR case form.

> **Note:** The **Employee Information** field values are automatically copied from the universal request to the HR case.

Create a new case form

Field	Description
COE	The Center of Excellence
HR service	The HR service type
Opened for	The person the ticket is opened for
Subject person	The subject person
Work notes	Other notes if any

6. Click **Submit**.
   The HR case number appears in the **Primary Ticket** field on the universal request form, and the ticket is listed in the **Associated Tickets** related list. Also the universal request number from which the HR case is created appears in the **Universal Request** field on the HR case form.

Work on an HR case of Universal Request in HR Service Delivery Agent Workspace

Provide resolution to an HR case that is initiated from a Universal Request.

Before you begin
Role required: routing_agent and sn_hr_core.case_writer

About this task
The state changes described in the procedure can be configured to suit your requirements. For more information, see Universal Request state mapping

Procedure

1. Open the HR case that is created from a Universal Request.
2. Click **Start Work**.
   The state of the case changes to **Work in Progress**.
3. Click **Closed Complete** when the resolution is provided.
   The state of the HR case is changed to **Awaiting acceptance** and the state of the universal request is automatically changed to **Awaiting response**. On the Employee Center:
   - If the user accepts the resolution, the state of the universal request is changed to **Closed**. The state of the HR case is automatically changed to **Closed Complete**.
   - If the user rejects the resolution, the state of the universal request is changed to **In progress**. The state of the HR case is automatically changed to **Work in progress.**

> **Important:** If for some reason the HR agent clicks **Closed Incomplete** without routing the HR case back to universal request, then the behavior is as follows:
>
> - If the **Needs Additional Review** check box is selected on the universal request, the universal request will be in the **In progress** state, and the HR case will be in the **Close Incomplete** state.
> - If the **Needs Additional Review** check box is deselected on the universal request, the universal request gets closed based on the state mapping.

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Transfer an HR case to Universal Request HR Service Delivery Agent Workspace

Transfer an HR case back to the Universal Request queue, or to another department with or without resolution.

Before you begin

Role required: routing_agent and sn_hr_core.case_writer

About this task

Configure the *sn_uni_req.transfer_type* property in the Universal Request properties page to determine how to handle the primary ticket transfers. For more information, see Universal Request properties.

Procedure

1. Open the HR case that you want to transfer.
2. Click **Transfer**.

   Note: The **Transfer** option is displayed only if you are a part of the assignment group or if the case is assigned to you.

3. In the transfer dialog box, provide the following details.

   Note: Based on your transfer type configuration, the given fields are displayed. For more information, see Universal Request Properties.

   - **Action**: Select if the case should be transferred to another department or back to Universal Request
   - **Department**: Select the department from the list.
   - **Service**: Select the specific service of the chosen department.
   - **Transfer reason**: Select the reason from the list.
   - **Transfer notes**: A brief description for routing the primary ticket that you want to pass to the UR Routing agent.
   - **Copy additional comments and attachments**: Deselect if you do not want to transfer the ticket with additional comments and attachments. By default, all attachments and comments are transferred.

     Note: Work notes are not copied while transferring.

4. Click **Transfer**.

Result

- On the HR case form, you can view the transfer reason and transfer notes.
- The state of the HR case is changed to **Closed Incomplete** and the transfer reason and transfer notes are copied to the universal request.
- The state of the universal request remains **In progress**.

Note: The state changes mentioned can be configured. See Transfer configuration for more information.

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Recommended Actions for HRSD

The Recommended Actions for HRSD provides real-time, actionable guidance and relevant resources that help HR agents speed up case resolution.

Get started

Explore	Configure	Use
		
Learn how Recommended Actions for HRSD can help an HR agent	Set up and configure Recommended Actions for HRSD to meet your specific needs.	Use Recommended Actions for HRSD to help HR agents speed up case resolution.

Exploring Recommended Actions for HRSD

The Recommended Actions for HRSD provides real-time, actionable guidance, and relevant resources that help HR agents speed up case resolution.

Recommended Actions for HRSD overview

HR Agents can access Recommended Actions in HR Agent Workspace by selecting the Recommendations icon ( ) in the contextual side panel of an HR case. The following details are displayed:

- Relevant KB articles and similar cases in the context of the current case.
- Suggestion to add an approval to the case whenever needed.

For more details, see Use recommended actions.

Recommended Actions for HRSD workflow

The workflow for Recommended Actions for HRSD includes the HR Case Context. Use the context to find and use the recommendations in Agent Workspace for HR Case Management.

Configuring Recommended Actions for HRSD

Configure recommended actions to create a context, rule, and recommendations with action types such as guidance.

Configuration overview

1. Install Recommended Actions for HRSD

   Download the Install Recommended Actions for HRSD application from ServiceNow® Store.

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2. Configuring the HR case context

   Configure recommended actions to create a context, rule, and recommendations with action types such as guidance.

Install Recommended Actions for HRSD

You can install the Recommended Actions for HRSD application (com.sn_hr_ra) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Recommended Actions for HRSD application (com.sn_hr_ra) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configuring the HR case context

Configure recommended actions to create a context, rule, and recommendations with action types such as guidance.

Contexts in Recommended Actions for HRSD

A context enables agents to see recommendations for a specific type of record when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.#For more information, see Contexts in Recommended Actions .

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The Recommended Actions for HRSD application ships the HR Case Context. Add rules, recommendations, guidance to this context based on your business requirements. To access HR Case Context, navigate to **All** > **Recommended actions** > **Contexts**

Guidance-based recommendations

The following guidance-based recommendations are provided by default for similar cases, and KB articles.

To create guidance, see Create a guidance in Recommended Actions.

Rules in Recommended Actions for HRSD

A rule is a set of conditions that applies to a context. A rule shows recommendations to agents with certain roles for records that meet certain conditions. For more information, see Rules in Recommended Actions.

The Recommended Actions for HRSD application ships the **HR Case Approval** rule by default.

Search Application Configuration

The HR system includes the **[AIS] Recommended Actions for HR Search Config** by default. This application supports the AI search for various records in Agent Workspace for HR Case Management, including cases, and KBs.

Alumni Center

The Alumni Center is your dedicated hub to stay connected with the organization after your tenure.

Benefits of an Alumni Center

The Alumni Center portal provides the following benefits to the alumni and organization:

Alumni

- Alumni can conveniently retrieve payroll information, tax documents, and employment verification letters without manual requests or delays. This self-service capability saves time and ensures secure access to sensitive data.
- The portal provides tailored job recommendations based on alumni profiles, previous roles, and preferences. Alumni can also track application status and set up notifications for new opportunities.
- Alumni can update personal contact details, manage preferences, and control visibility settings (public/private) for their profile, ensuring accurate and secure records.
- The portal offers access to company news, announcements, and knowledge resources, helping alumni remain updated on organizational developments and industry insights.

Organization

- Maintain relationships with former employees, making it easier to rehire skilled talent when needed.
- Reduce recruitment costs and shortens onboarding time, as returning employees are already familiar with company processes.

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- Enhance organization's brand and networking by offering a structured alumni experience, and creating a positive impression even after employees leave.
- Access to a broader and pre-qualified talent pool through job listings and personalized recommendations offered in the alumni portal.

Content analytics

The Alumni Center provides a separate content analytics tracking profile. For more information, see Create a Content Analytics tracking profile.

Employee to alumni transition

A personal email is required to transition from an employee to an alumnus.

You can perform this transition for individuals or in bulk. To access the Alumni Center, users must have one of the following roles:

- [sn_asc.admin]
- [sn_asc.manager]

Note:

- You can add the alumni roles (sn_asc.admin) and (sn_asc.manager) to any user. For more information, see Assign a role to a user.
- To be able to login and access all the alumni features, you must be a user in the Alumni table (sn_asc_user) and not in the User table (sys_user).

Verify that alumni aren't included in your UU licensing counts

When an employee transitions to an alumnus, and you're using Unrestricted User (UU) licensing, you'll want to avoid inflating user counts when providing services to your alumni. Verify that the following parameters are updated in the [sys_user] table.

- If you have HRSD Enterprise, with HR or unrestricted users, and you use Alumni Center, you must make users inactive in the [sys_user] table as part of the offboarding process. Once the record is inactivated, it won't be counted in the UU count.

  Note: The Alumni Center offboarding workflow creates a new alumni record in the Alumni Users [sn_asc_user] table that provides alumni access to the Alumni Center services and resources when the User [sys_user] profile is inactive.

- If you have HRSD Professional, with HR or unrestricted users, and are providing alumni services outside of Alumni Center, to help avoid former employees from being included in the UU count, you must create a custom alumni table. The custom alumni table extends the [sys_user] table. When an employee leaves the organization, you can change the user class of the employee in the [sys_user] table from **User** to the sys class name that corresponds to the custom alumni table.

  Note: Creating a custom alumni table to service alumni outside of Alumni Center is considered a custom implementation. Refer to Create a table for more information.

For additional information, see the DEF1000205 | HR User [KB1125071] article in the Now Support Knowledge Base.

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Get started

Explore	Configure	Use
		
Detailed information on Alumni Center	Configure the application to get started	Know how you can use Alumni Center

Additional resources

- Learn more about what's new and changed, see the .
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring the Alumni Center

Use the Alumni Center to discover resources that keep you connected, update your profile, access HR services, stay informed with company news, and browse job listings.

The Alumni home page serves as a central hub for former employees to update their details, manage preferences, and access personalized job recommendations. It also offers quick links to alumni services, news, resources, and tasks, helping you stay connected and engaged.

Note: To be able to login and access all the alumni features, you must be a user in the Alumni table (sn_asc_user) and not in the User table (sys_user).

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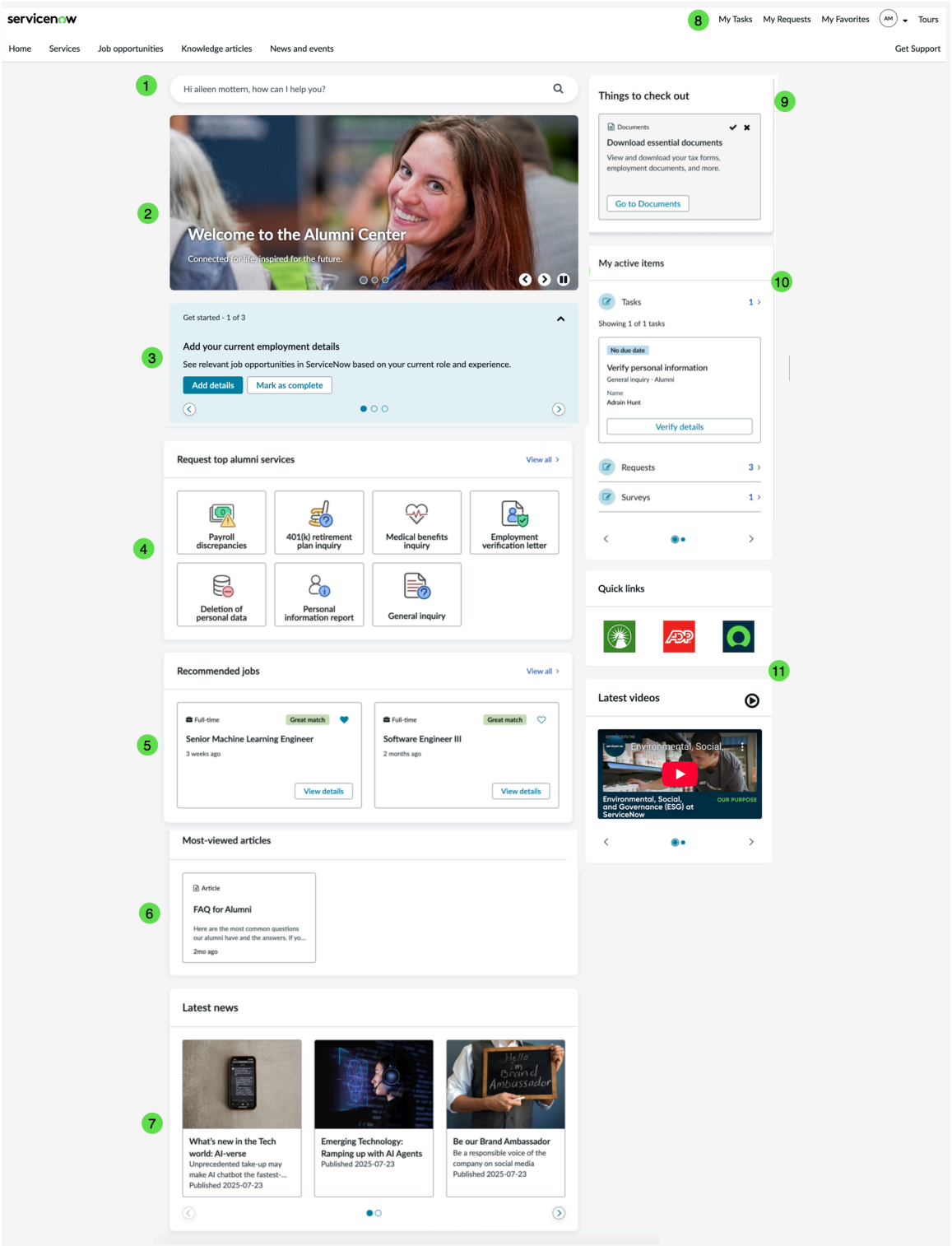

Alumni Home Page widgets

Number	Widget description
1	Search bar with AI search.
2	Welcome banner.
3	Get started widget to add your details like,

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Alumni Home Page widgets (continued)

Number	Widget description
	• Your profile and other employment details. • Set up email notification preferences. • Set up preferences for tailored job recommendations. **Note:** After you enter the details and select **Mark as complete** this widget will no longer be displayed.
4	Top services available for you. The alumni services are: • Employment Verification Letter • General inquiry • Payroll Discrepancy • Retirement Benefits • Medical Benefits inquiry • Get Personal Data • Data Deletion • Assets Return
5	Recommended job opportunities for you. For more information on job opportunities, see Alumni job opportunities.
6	Most viewed KB articles.
7	Latest news updates.
8	Access to My Tasks, My Requests, and My Favorites.
9	Proactive prompt for a new document added to the alumni Profile. **Note:** If there are no new documents, this prompt widget is not displayed.
10	Your active items.
11	Quick links and latest videos.

The Alumni home page uses some of the widgets from **Content Delivery**. For more information, see Content Publishing.

For more information about the service portal, see Service Portal.

For more information on the Employee Center, see Employee Center.

Alumni profile

Update your personal details and maintain your employment history in your Alumni profile.

Role required: sn_asc.alumni

The **Profile** option under your name contains various widgets to manage your data like, legacy and latest employment details, personal details, documents, and preferences.

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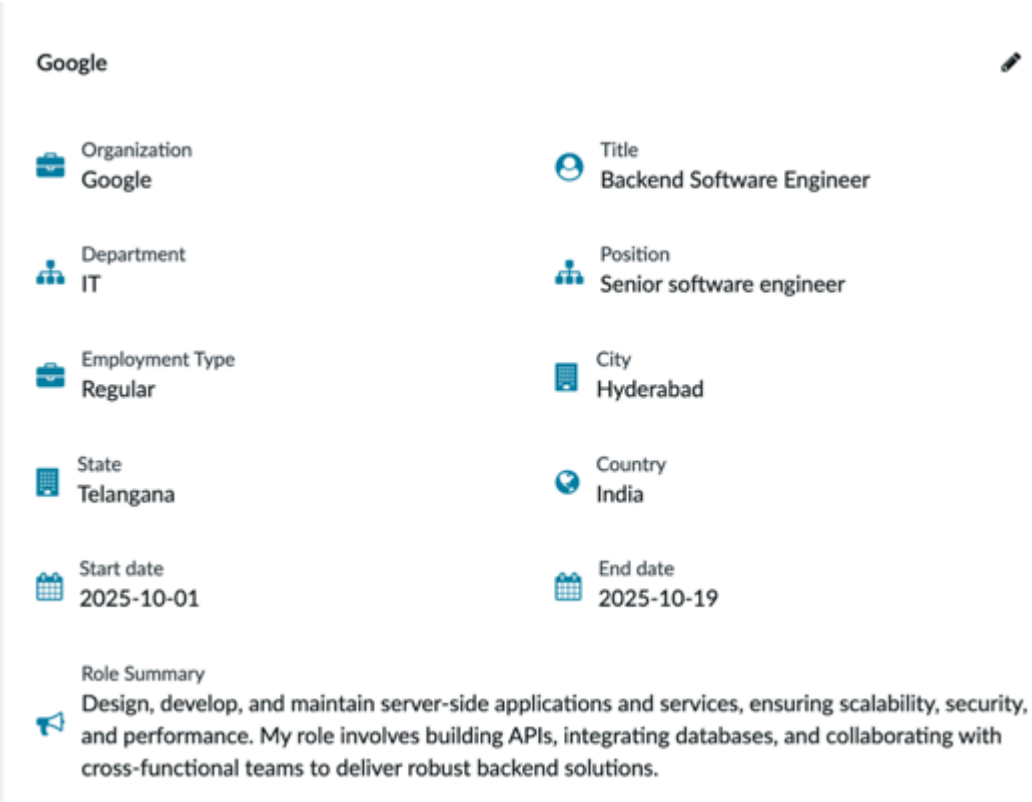
Other employment details

Your latest employment details for all the companies you've worked with.



For more information, see Add other employment details.

Past employment details

Your legacy employment details in the organization appear here automatically from your ex-HR profile. If any details are missing, create a service request to update them.

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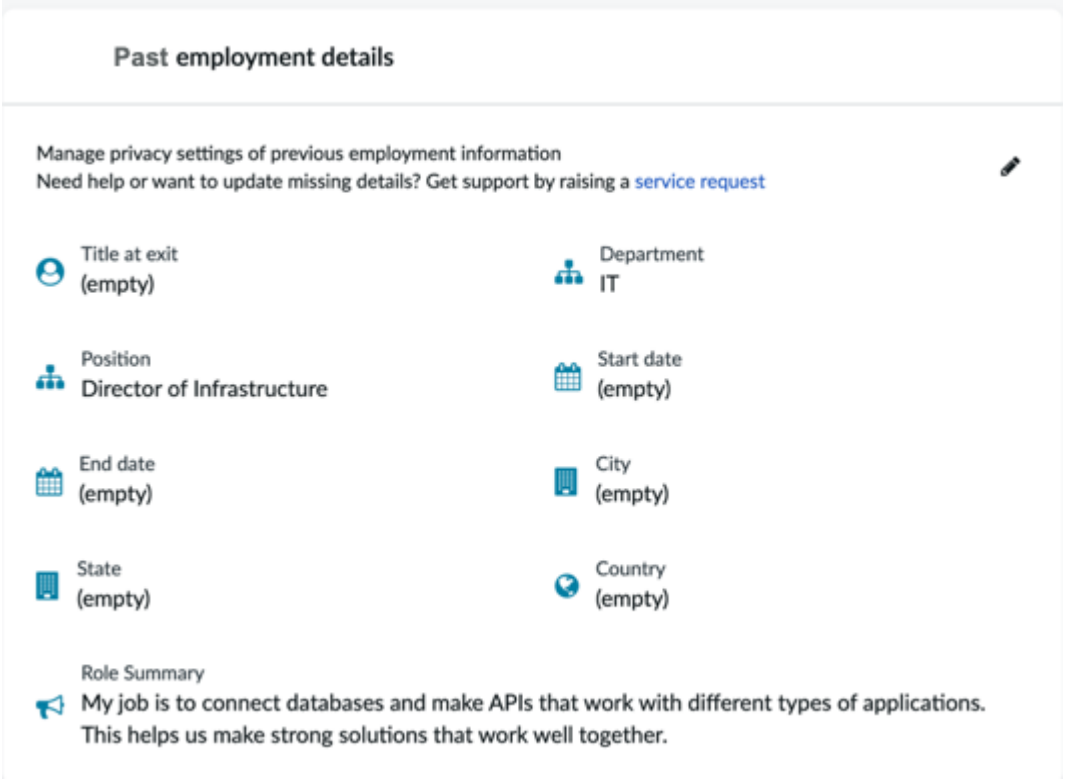

Note: If this section doesn't show your details, your HR profile has been purged. Select the **Request profile update** button to create a service request. Provide your employment details, and an agent creates a new HR profile and update it.

Personal details

Your personal details are retrieved and displayed here automatically from your ex-HR profile. You can edit all your personal details, except for your personal email ID.

Note: In cases your alumni account is created through the automated offboarding process, the relevant details are automatically retrieved from the HR profile.

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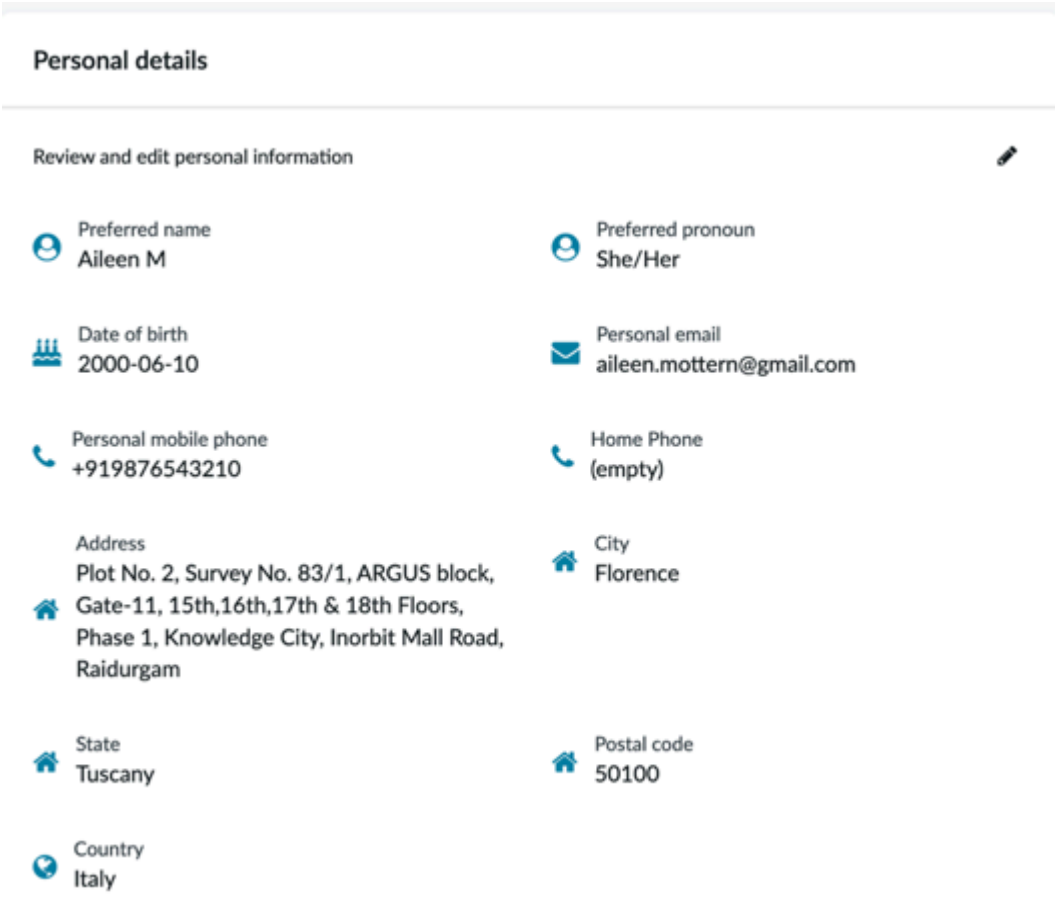
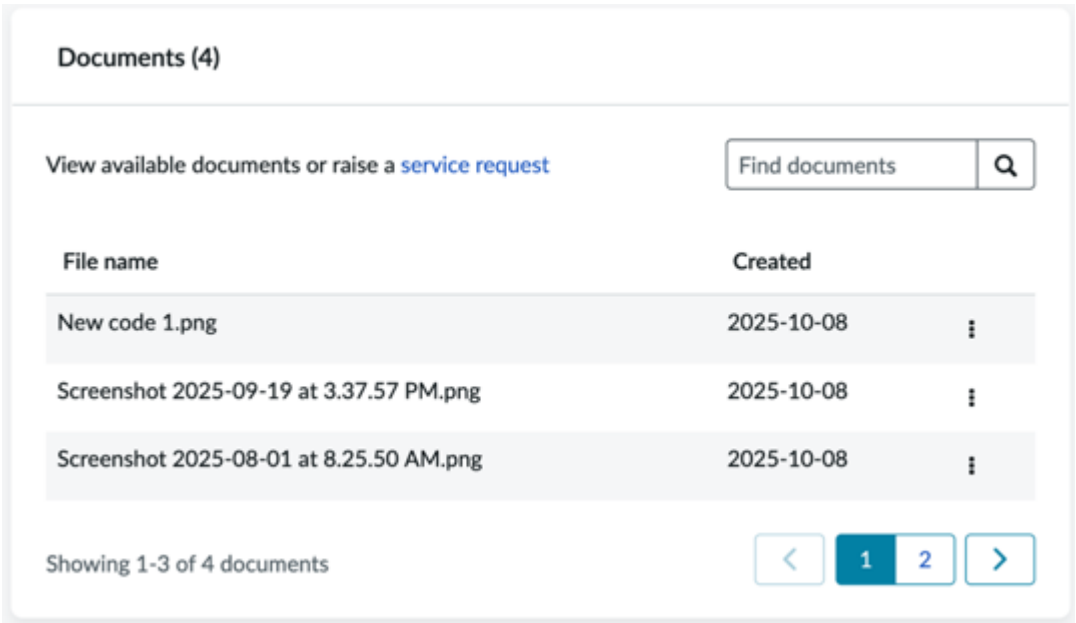


For more information, see Edit personal details.

Documents

Access your documents shared through the service requests directly from your profile.



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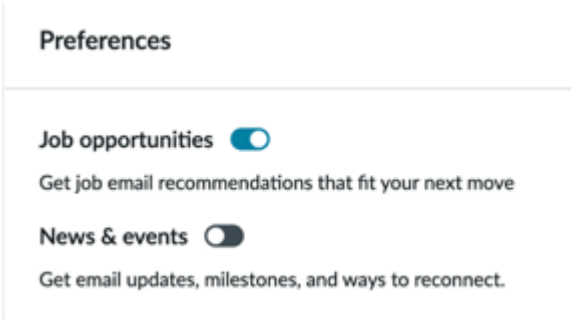
Preferences

Enable or disable email notifications for recommended job opportunities, news, and event updates.



Alumni job opportunities

Discover job opportunities tailored to your skills and interests, and explore roles that align with your experience.

Role required: sn_asc.alumni

Job opportunities are displayed based on your preferences and current role, using scoring from your legacy and current employment details. The Job Opportunities tab shows external roles sourced from the Job Posting table [sn_ta_hiring_core_job_posting] in Hiring Core.

Note: Organizations can import external job data into the Hiring Core plugin to display these roles as job opportunities for alumni.

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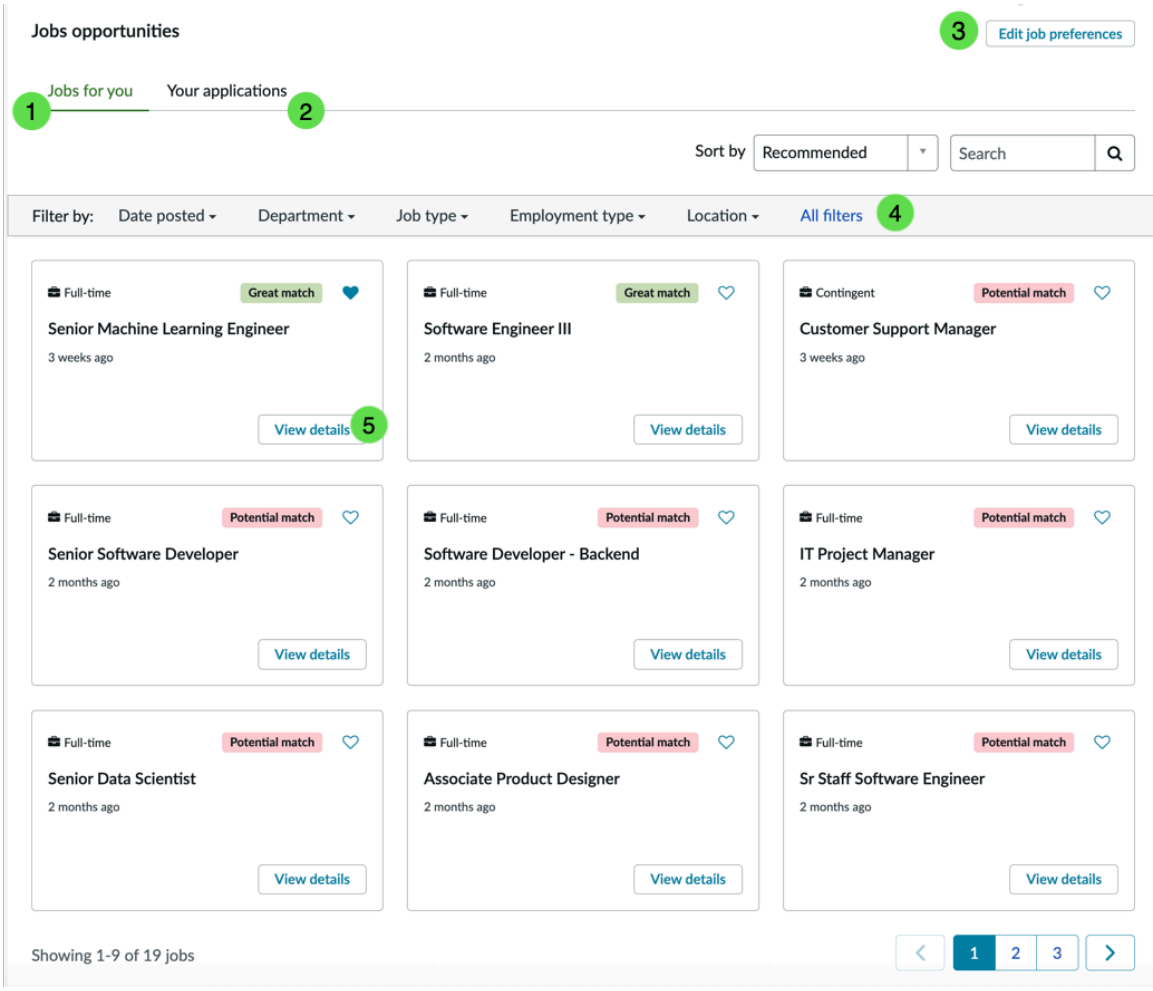

Job opportunities page

Number	Element description
1	View the job opportunities. Jobs displayed here are matched using an algorithm that calculates scores based on your job preferences and latest employment details. Depending on the scores, the jobs are assigned tags as follows: • Great match: 80 -100 score • Good match: 60–80 score • Potential match: 40–60 score **Note:** • In case both job preferences and alumni latest employment details are not available, the job recommendation algorithm falls back on the legacy employment details, which may not be relevant now. • To receive suitable job recommendations, it is imperative that you select your job preferences, and also enter your employment details.

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Job opportunities page (continued)

Number	Element description
2	Track your job application status. **Note:** Your application is processed in the linked Applicant Tracking System (ATS). The information displayed here is fetched from ATS for your convenience.
3	Your job preferences that help in generating job recommendations. For more information, see Alumni job preferences. **Note:** Admin can configure this form according to the organization requirements. For more information, see Configure alumni job preferences.
4	Filters to search for relevant jobs. You can filter on location, job type, employment type, date posted, and department.
5	View job details like description and applicant criteria. Select **Apply**, which will take you to ATS to further process your application.

Setting up your Alumni Center

Set up your Alumni Center so you can communicate with your former employees or non-employees.

The following plugins must be activated prior to activating the Alumni Center (sn_asc) plugin:

- Human Resources Scoped App: Core (com.sn_hr_core)
- Employee Center (sn_ex_sp)

For more information on requesting activation of a plugin, see Request a plugin.

To set up Alumni Center, you must request activation for the following: Explicit Roles (com.glide.explicit_roles). The Alumni Center uses this plugin to help segregate external users from internal users.

Note: The Explicit Roles (com.glide.explicit_roles) plugin must be activated before activating the Alumni Center (sn_asc). For information on installing a ServiceNow Store application, see Install a ServiceNow Store application.

Roles installed

By activating the Alumni Center [sn_asc] plugin, the following roles install and are required to configure your Alumni Center:

Roles installed with Alumni Center

Alumni Center role	Description	Contains roles
Alumni Center admin [sn_asc.admin]	Lets you configure all aspects of Alumni Center.	• Role delegator [role_delegator] • Skill user [skill_user]

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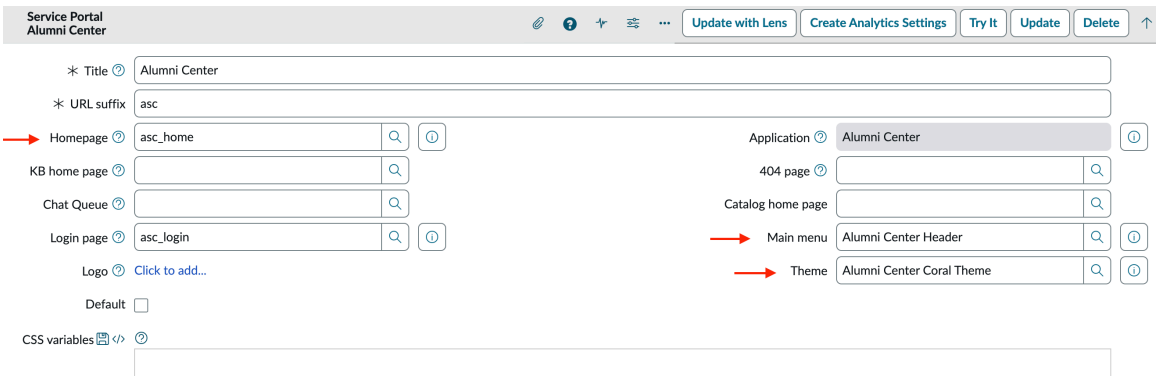
Roles installed with Alumni Center (continued)

Alumni Center role	Description	Contains roles
		• Alumni Center manager [sn_asc.manager] • Live feed administrator [live_feed_admin] • Chat administrator [chat_admin} • Service Portal administrator [sp_admin] • Service Catalog administrator [catalog_admin]
Alumni Center Alumni [sn_asc.alumni]	Lets you access Alumni Center as an alumnus.	External Alumni Center user [snc_external]
Alumni Manager [sn_asc.manager]	Lets you manage Alumni Center, which includes alumni records and some of the import process.	Content Delivery manager [sn_cd.content_manager]

Alumni Center – Service Portal configuration update

After upgrading the latest platform version or the Alumni Center Store App version, manually update the following three fields in the Alumni Center – Service Portal record to preserve your customizations. These values do not update automatically.

- Home page: asc_home
- Main menu: Alumni Center Header
- Theme: Alumni Center Coral Theme



Supported task types

The base system supports the following task types:

- Collect Employee Input
- Checklist
- E-signature (HR core only)

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- Mark when complete
- Take survey
- Upload documents
- URL
- View video

Adding content

The Alumni Center uses the same widgets as the HR Service Delivery Employee Center. For more information, see Employee Center widget instance options.

Use Content Publishing to add and display content to your Alumni Center. For more information, see Content Publishing.

To add content as part of a campaign, use **Content Automation**. For more information, see Working on Campaigns.

Load data

To add alumni users in bulk, use **System Import Sets**. For more information, see Import sets key concepts.

At a minimum, the file you upload must have a header and the personal email for each alumnus.

Note: Use the Imported Alumni [sn_asc_user_imp] table when importing users.

Transform and edit

After loading your file:

- Transform your import set so that it moves to staging.
- Go to **Staged Alumni** to view what was loaded from your file.
- You can edit the loaded users, ensure unique user IDs, or approve if they look valid.
- From the list view of Staged Alumni, click **Import All Approved** to start the Import Approved Staged to Alumni scheduled job.

Configure alumni creation

As an admin, use the various configurable methods to enable seamless employee-to-alumni transition.

Before you begin

Role required: sn_asc.admin

- Review personal details - Enable offboarding employees to review and update their personal details to promote seamless communication.
- Automated onboarding – Configuration to create alumni records automatically for employees who meet the specified criteria during the employee offboarding. For example, employees who are not in the active status and who's employment end date was five days ago.
- Admin import – Configuration to bulk upload alumni records through data imports.
- Alumni Self-registration – Configuration to auto-approve or manually approve the alumni profiles created using self-registration on the alumni portal.

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Procedure

1. Navigate to **All** > **Alumni Service Center** > **Administration** > **Configuration**.
2. In the Personal Details Review tab, select the **Add Filter Condition** to configure a trigger condition, which creates a task for employees during their offboarding stage.
   This HR task enables employees leaving the organization to verify and update their personal information, which includes personal email, phone number, and shipping address. These details are essential for post-employment communication. Employees can verify their details in two ways:
   - Verify Personal Details activity – offboarding Journey lifecycle event
   - Verify Personal Details task – In Employee Center To-dos.
3. In the Automatic creation tab, select the **Add Filter Condition** to configure specific conditions on creating the alumni record automatically.

   a. In the Default state field, select Approve or Approval needed.
   The alumni records are automatically created in the staging table. Selecting Approved creates an alumni staging record with Approved status, and selecting Approval needed creates an alumni staging record that require manual approval.

   Note: A scheduled job (Import Approved Staged to Alumni) generates alumni records for the staging entries in the Approved status.

4. In the Admin import tab, select the relevant properties to configure the alumni record status when the data is imported via an Excel sheet.

Admin Import Properties form

Property	Description
Default state (sn_asc.import.default.state)	The default status for the staged alumni records when created by an import set and default transform map. The default state is Approved.
Alumni suffix (sn_asc.import.alumni.suffix)	Suffix added to the end of the user names for alumni records. Having a suffix distinguishes between your current work force and alumni. **Note:** The default suffix provided is .alum. You can also customize the suffix to match your requirements.
Username max tries (sn_asc.import.user_name.max.tries)	The number of times the application attempts to add a digit to an alumni user ID to create a unique ID. For example, when you have multiple people with the same name, the system adds a unique number at the end of each user name. This property determines how many times the system adds a unique number to similar user IDs.

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Property	Description
	Note: The default value is 50. If zero (0) is entered, only the suffix is used to distinguish between users with the same name.

5. In the Self-registration tab, select the default approval status to create alumni users without manual intervention when users self-register on the alumni portal.
   - Default state - Use this status when the self-registered user details don't match with the details in the HR profile. Selecting Approved creates an alumni staging record in Approved status.
   - Default state(Alumni verified) - Use this status when the self-registered user details match with the details in the HR profile. Selecting Approved creates an alumni staging record with Approved status.
   - Default fields to match on - Use the configurable JSON script where you can add fields in the 'must' (all the fields must be matched) and 'any' (any one of the fields must be matched) categories to map the alumni user internally.

     For example,

```
{
  "must": [
    {
      "sourceField": "first_name",
      "targetTable": "sys_user",
      "targetField": "first_name"
    },
    {
      "sourceField": "last_name",
      "targetTable": "sys_user",
      "targetField": "last_name"
    }
  ],
  "any": [
    {
      "sourceField": "u_employee_number",
      "targetTable": "sys_user",
      "targetField": "employee_number"
    },
    {
      "sourceField": "email",
      "targetTable": "sn_hr_core_profile",
      "targetField": "personal_email"
    }
  ]
}
```

   Note: A scheduled job (Import Approved Staged to Alumni) automatically generates alumni records for these approved entries.

6. Select **Update**.

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Properties for Alumni Center

Use properties to control the behavior of the Alumni Center.

Before you begin
Role required: sn_asc.admin

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Select the properties to edit:

Alumni properties

Property name	Description
sn_asc.top_alumni_services	HR services that are to be displayed in the **Request top alumni services** widget in the Alumni Center home page.
sn_asc.self_registration.personal.email.domains	List of domain names that are allowed for personal email when an alumni is self-registering.
sn_asc.alumni_import_exclusion_fields	List of alumni user (sn_asc_user) field names, that will be excluded from copying during the process of alumni user creation.

3. Edit the properties according to your requirements.
4. Select **Save**.

Add an import set of alumni for Alumni Center

Use **System Import Sets** to upload your file of alumni.

Before you begin
Role required: import_set_loader

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Existing table** from **Import set table**.
3. Select the **Imported Alumni [sn_asc_user-imp]** table from **Import set table**.
4. Check **File** from the **Source of the import** field.
5. Click **Choose File**.
6. Find the file that contains your list of alumni and select it.
7. Click **Open**.
8. Click **Submit**.
9. Click **Run Transform**.
10. Click **Transform**.
11. To view the import set, click the import (ISET) set number link.
    To view a list of staged alumni, see Edit staged users for Alumni Center

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Edit staged users for Alumni Center

Use **Staged Alumni** to ensure the import set upload and transform process ran correctly. It also ensures that your uploaded alumni are configured with the correct user ID.

Before you begin

Role required: sn_asc.admin

Procedure

1. Navigate to **All** > **Alumni Service Center** > **Administration** > **Staged Alumni**.
2. Review the list of staged alumni.
3. Look for and correct duplicate names and duplicate user IDs.
4. Click the number associated with a user to edit it.
5. Enter or edit the fields on the form for the user.

Staged alumni form

Field	Description
Number	The automatically assigned staging number of the user.
State	The status of the user. ○ Approval Needed ○ Approved ○ Alumni Created ○ Duplicate ○ Invalid ○ Denied
Personal email	The personal email of the user. How your company contacts the user.
Internal user	The user record found in the User [sys_user] table for the alumnus.
Internal profile	The HR profile of the user.
Alumni	The name of the user found in the Alumni [sn_asc_user] table.
First name	First name of the user.
Last name	Last name of the user.
Date format	Date format to override the system date format.
Time zone	The time zone the user resides in.
Proposed user ID	The user ID created after you fill in the fields and click **Generate Proposed User ID**. The user ID creates based on the personal email address provided with a suffix from the

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Field	Description
	properties. For more information on the suffix, see Properties for Alumni Center.

6. Select **Save**.
7. Select **Generate Proposed User ID**.
8. Select **Update**.
9. After making edits, ensure that valid users are in the **Approved** state.
10. Return to the **Staged Alumni** list view.
11. Select **Import** or from the **Staged Alumni** list, select **Import All Approved** at the bottom.
12. Select **Import All**.
    For more information about the default state for staged alumni, see Properties for Alumni Center.
    The Import Approved Staged to Alumni scheduled job runs.

Configure alumni job preferences

Set the questions that the alumni can choose to receive tailored job recommendations.

Before you begin

Role required: sn_asc.admin

Procedure

1. Navigate to **All** > **Tables** > **Alumni job preference configs**.
2. Select **New**.
3. In the form, fill in the following details.

Job preferences form

Field	Description
Name	Name for the preference.
Active	Make the preference active or in active.
Application	The application where this preference question is displayed. Alumni center in this case.
Domain	The scope of this preference. For example, global.
Display type	The selection type for the preference options. For example, single select or multi select.
Display question	The question that is displayed to the alumni for this preference.
Order	The order in which this question is displayed to the alumni. For example, 1 displays the question as first.
Weight	The weightage for this question. Based on this weightage the jobs are scored and displayed to the alumni. For example,

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Field	Description
	entering 100 for this question has more weight compared to 80 for another question. Any number you enter here is normalized internally.
Field	The options for the preference question are extracted from this field. This field refers to the field values in the Job postings (sn_ta_hiring_core_job_posting) table.

4. Select **Save**.

System notifications for Alumni Center

The Alumni Center uses system notifications to alert alumni with an email providing their user ID and a separate email with a password.

When an alumnus logs in for the first time, they are prompted to change the password provided.

The base system provides the following email notifications:

- Invite Alumni Email - Username
- Invite Alumni Email - Temp Password

You can customize the message to suite your company's requirements.

For more information, refer to Email and SMS notifications.

Configure email and password resets for the Alumni Center

Use **Notifications**, to configure the emails that send the user ID and password reset for your alumni.

Before you begin

Role required: sn_asc.admin

Procedure

1. **System Notification** > **Email** > **Notifications**.
2. Click **Invite Alumni Email - Username** and edit the **Message HTML** to reflect your company's message on providing an alumnus with a user ID.
3. Click **Preview Notification** to preview your message.
4. Click **Update**.
5. Click **Invite Alumni email - Temp Password** and edit the **Message HTML** to reflect your company's message on providing a temporary password to your alumni.
6. Click **Preview Notification** to preview your message.
7. Click **Update**.

Using your Alumni Center

Company alumni or former employees use the Alumni Center to obtain information or maintain communication with your former company.

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Register on the Alumni Center website

As an external user, sign up using a personal email address and other details to self-register as alumni.

Before you begin

Role required: sn_asc.alumni

Procedure

1. Navigate to Alumni Center website.
2. Select **Register as alumni** on the login page.
3. Fill in the fields on the alumni self-registration form.

Alumni self-registration form

Fields	Description
First name	Your first name.
Last name	Your last name.
Personal email address	Your personal email address. **Note:** The First name, Last name, and Personal email address fields are required. The email address that you provide here is verified with the existing personal email addresses in your HR profile to create the alumni record.
Employee number	Your employee number in your previous organization.
Employment start year	Beginning year of your employment.
Employment end year	Terminating year of your employment.
Date of birth	Your date of birth.
Country code	The country code for your mobile number.
Mobile number	Your mobile phone number.
Street	Your street name.
City	Your city name.
State / Province	Your state or province.
Zip / Postal code	Your postal or zip code.
Country	Your country.

4. Select the check box to agree to the privacy policies and terms and conditions.
5. Select **Sign Up**.

Result

A mail is sent to your personal email, which contains a verification link. After you select the link, a staging record is created for you so that the admin can verify your details and move the record to Approved or Rejected status.

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- If approved, the user ID and password are communicated to you via the personal email address provided.
- If rejected, you receive an email to fill in the required details by selecting to register again, and the verification process is repeated.

Alumni job preferences

Set your preferences for tailored job opportunities. Jobs that best match your profile are recommended based on these preferences.

Before you begin

Role required: sn_asc.alumni

Procedure

1. Navigate to *Alumni Center* > **Job opportunities**.
2. Select **Edit job preferences**.
3. In the form, choose your job preferences.

Job preferences form

Question	Options
Which type of job do you prefer?	Your preferred job type. For example, Hybrid, In office, and Remote.
Which job levels are you interested in?	Your preferred job levels. Job levels are specific to your organization. For example, IC1, IC2, IC3, IC4, M1, and M2.
How much travel are you comfortable with?	Slide the bar to your preferred percentage, which is the amount of time that you are willing to travel for this job.
Which work locations do you prefer?	Your preferred work location.
Employee type	Your preferred employment type. For example, Contractor, Full-time employee, Part-time employee, and so on

Note:

- If you don't select any option for a question, that question won't be considered for score calculation.
- Alumni preferences are configured by your organizations administrator. You can see different preferences depending on how your organization configures the preferences. For more information, see Configure alumni job preferences.

4. Select **Save**.

Add other employment details

Update the alumni profile with additional employment details to ensure an accurate career history and provide tailored job opportunities.

Before you begin

Role required: sn_asc.alumni

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Procedure

1. Navigate to **All** > *Alumni Center* > **Profile**.

   Note: Select your name to see the profile option.

2. Select Other employment details.
3. Enter your experience details by filling in the fields.

Other employment details form

Fields	Description
Organization	Your company name.
Title	Your title in this company.
Department	Your department in this company.
Position	The position you have held in this company.
Employment type	Your employment type whether full-time, part-time, or a contractor.
City	Your city name.
State	The state you belong.
Country	Your country.
Start date	Your employment start date in this company.
End date	Your employment end date in this company.
Role summary	Write a brief description of your role in this company.

Use the Public or Private option for each field to control whether other alumni can view these details.

4. Select **Save**.
5. **Optional:** Select **Preview profile** to see how your profile looks to other alumni.

What to do next

- Use + icon to add additional employment details.
- Use to edit the existing employment details.
- Use the **Delete** button to delete an existing employment information.

Edit personal details

Review your personal details and edit them if necessary.

Before you begin

Role required: sn_asc.alumni

Procedure

1. Navigate to **All** > *Alumni Center* > **Profile**.
2. Select Personal details.

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3. Edit your personal details in these fields.

Personal details form

Fields	Description
Preferred name	Your name.
Preferred pronoun	The pronoun you prefer.
Date of birth	Your date of birth.
Personal mobile phone	Your personal mobile number.
Home phone	Home phone number, if you have any.
Address	Your residential address.
City	The city you reside in.
State	The state you belong.
Postal code	Your postal code.
Country	Your country.

Use the Public or Private option for each field to control whether other alumni can view these details.

4. Select **Save**.

Manager Hub

The ServiceNow® Manager Hub increases managers self-service and proactive engagement with their team by providing insights and recommended actions for what's most urgent and important to drive team success. It enables managers to grow as leaders through curated and personalised resources.

Managers have a complex job that is to focus on achieving business outcomes, and also help their employees develop and grow. Manager Hub helps reduce managers time, energy, and actions and help them focus on things that will keep their team supported and engaged.

Following are a few key features of Manager Hub:

Engage with your team

Approve team requests and act immediately on any tasks that need your attention.

Have a better engagement with your team by staying informed on the upcoming team events, such as employee birthdays, work anniversaries, or reminders on new hire joining dates.

View the time zones of employees across the globe. Be more conscious about the time the meetings are scheduled or when certain requests are sent out to the team.

Focus on your team needs

Effectively manage a globally disbursed team with a mixture of direct reports, as well as managers that have their own direct reports. Have an insight into data of all workers including employees, interns, and contingent workers and the various transitions that they may have.

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Create and publish customized plans for key employee transitions, such as career growth, internal mobility, promotions, using the Journey Accelerator templates. Automate the new hire onboarding process using Journey Designer.

Understand where employees stand in the process of their journeys. Identify if any cross-functional team requests are blocking productivity of your employees.

Get your team insights

View historical trends and statistics about your team and organization. Get insight-based suggestions on improving processes with tips and tools, or upcoming deadlines, or supporting employee journeys better.

Find data visualizations about your team, their service requests, journeys, and learnings.

Grow as a people leader

Enhance your skills and grow as a people leader through materials and resources provided in Manager Library.

Use resources on career development, leader enablement, hiring and transitions, employee performance evaluation, upcoming managerial events, knowledge base articles and managerial tools that help you work efficiently.

Customize your user experience

A Manager Hub administrator can configure fields, customize display text and icons suiting the requirements of managers of your organization. For more information, see Configure Manager Hub.

A predefined set of configurations are also available to use after you have activated Manager Hub from ServiceNow Store.

Get started

Explore	Configure	Use
 Detailed information on Manager Hub	 Configure the application to get started	 Support your team and find resources to grow as leaders
Integrate	**Reference**	
 Extend Manager Hub capabilities by integrating with other applications	 Get details about user roles, tables,	

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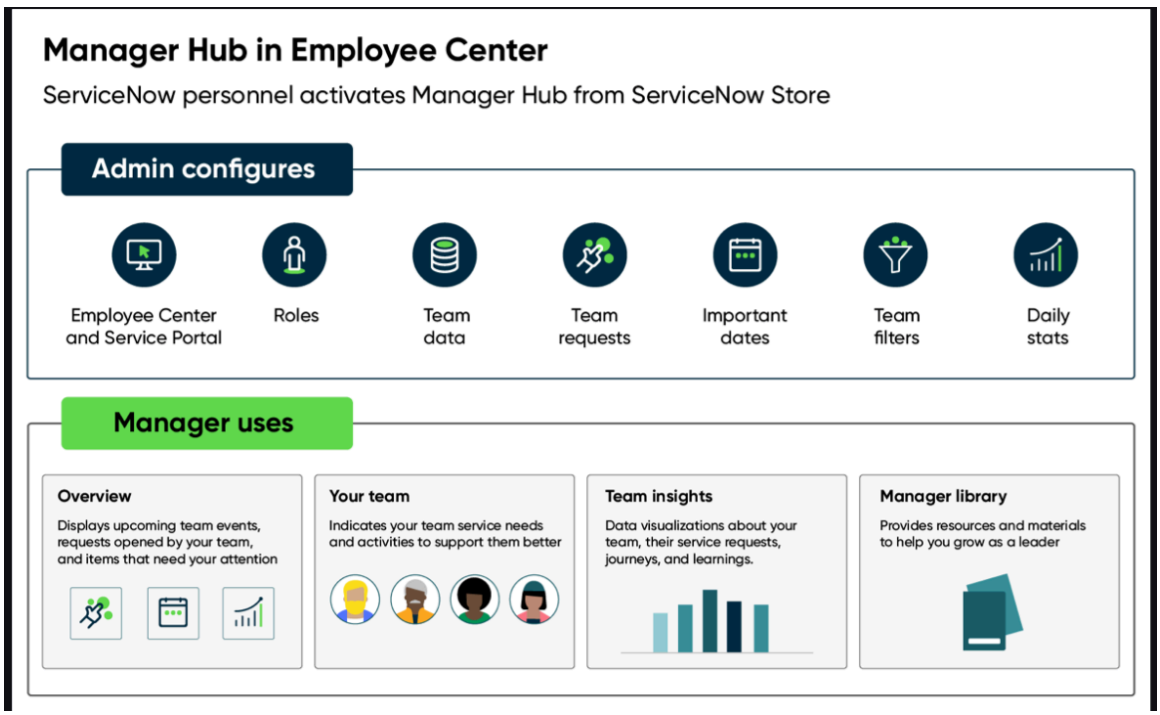
Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Manager Hub

Learn how to set up and start using Manager Hub.



1. Activating application

Activate Manager Hub from ServiceNow Store.

Note: Manager Hub is available with the Employee Center Pro application. Some of the features of Manager Hub work only when the HR Service Delivery and Employee Journey Management applications are activated.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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2. Configuring data

Configure roles, team data, team requests, important dates, team column data, team filters, daily stats, and Employee Center and other Service Portals. Display curated and personalized data to managers in Manager Hub.

To learn more about this, see Configure Manager Hub and Reference for Manager Hub.

3. Using Manager Hub in Employee Center

Have a better engagement with your team — Act on items that need immediate attention, keep yourself up-to-date on upcoming team events and employee transitions, and expand your leadership skills.

To learn more about this, see Use Manager Hub.

Configure Manager Hub

Configure Manager Hub by setting up data suitable to the needs of people managers in your organization.

RCA approvals for Manager Hub

After you install Manager Hub, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request.

Before you begin

- Role required: admin
- The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming.

  To automate the RCA approvals for any record, you can run the **MH bulk RCAs approval** script where the source scope is Manager Hub. Download the MH bulk RCAs approval file from the **Supporting Links and Docs** section in ServiceNow Store. This file is a standalone script to reduce the manual effort involved. After you download the script file, perform the following steps:

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Right-click the header and choose **Import XML**.
3. Click **Choose file** and select the XML file that you downloaded.
4. Search and find the **MH bulk RCAs approval** script record.
5. Click **Run Script** to allow all the requested RCAs.

> **Note:** The fix script can approve the RCAs that exist at the time of execution. After running the RCA script, if you install new plugins, such as Human Resources Scoped App [com.sn_hr_core], Human Resources: Integrations [sb_hr_integration], Journey Accelerator [sn_ja], Journey Designer [sn_jny], and Document Template [sn_doc], rerun the RCA script to approve the new RCAs.

Activate a scheduled job

Activate and run the Add Manager Hub user role scheduled job to assign the Manager Hub user role to new people managers. When the scheduled job runs, it considers delta changes and assigns the Manager Hub user role to new managers only.

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Before you begin

- Role required: admin
- An administrator must review the criteria before assigning the Manager Hub user role to managers. Default criteria: The manager field of sys_user table is considered for assigning the Manager Hub user role.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. Open the Add Manager Hub user role scheduled job.
3. Set up the time and schedule at which you want to run the scheduled job.
4. Enable the **Active** check box.
5. Click **Update**.

Configure important dates

Configure important dates, such as employee leaves, employee birthdays, or anniversaries, that you want to display on the **Upcoming team events** widget in Manager Hub.

Before you begin

Role required: sn_mh.admin

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **Important Dates Configuration**.
2. Click **New**.
3. On the form, fill in the fields:

Important Dates Configuration form

Field	Description
Table	Table on which you want to apply filter conditions.
Condition	Conditions that you want to apply on the selected table.
Active	Option to activate or deactivate important dates configuration record.
User field	Field of the table on which the manager filter is applied to fetch the reporting employee details such as name or email.
Display details	
Is annual recurring event	Enable the check box if the event occurs every year, for example, birthdays or anniversaries. **Note:** For an annual recurring event, the offset date range must be less than 365 days.
Date offset unit	Number of days, weeks, or months that defines your offset units. For example, week, day, or month.
Date offset	Do you want your offset to be before the start date field that you have selected, for example, 1.

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Field	Description
before quantity	
Date offset after quantity	Do you want your offset to be after the start date field that you have specified, for example, 1.
Start date field	Indicates the start date from which you want to pull important dates. For example: Assume that the important dates configuration record is being created to display birthdays of team members. Data offset unit is **Week** and Date offset before quantity and Date offset after quantity is **1**. All the birthdays before and after a week of start date are pulled and displayed on the Important dates widget in Manager Hub in Employee Center.
End date field	Indicates the end date until which you want to pull important dates.
Display data source	Display source for grouping based on the field selected. For example, PTOs can be grouped by PTO type.
Order	Order in which the important dates configuration records are to be displayed on Manager Hub in Employee Center. The important dates configuration record with the lowest order number appears first, and the important dates configuration record with the highest order number appears last on the user interface.
Action type	Type of action displayed against the important date record on Manager Hub in Employee Center, such as URL or Email.
URL	URL to be displayed against the important date record on Manager Hub in Employee Center.
Action icon	Display icon to be displayed against the important date record on Manager Hub in Employee Center.
Action tooltip	Text that appears when you point to the action icon against the important date record on Manager Hub in Employee Center.
Single record display label	Text that must appear only if a single important date configuration record is displayed on Manager Hub in Employee Center. For example: ${employee_name}'s anniversary. **Note:** Use tokens in display labels to show dynamic variables to end users. Available tokens: ${employee_name}, ${display_data}
Multiple record display label	Text that must appear when multiple important date configuration records are displayed in Manager Hub in Employee Center. For example: ${count} employee's have anniversary. **Note:** Use tokens in display labels to show dynamic variables to end users. Available tokens: ${display_data}, ${count}

4. Click **Submit**.

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Configure team requests

Configure the type of team requests that you want to display on the **Requests opened by your team** widget in Manager Hub.

Before you begin

Role required: sn_mh.admin

This allows managers to be informed of any support requests their team has, that they may want to be aware of, even if no specific approval or task has been assigned to them.

In addition to the sn_mh.manager_hub_user role, the logged in manager must also have the required ACLs or roles to view certain team requests. For example, if there are any open requests related to HR cases, then the logged in manager must also have the sn_hr_core.case_reader role to view those requests.

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **Team Requests Configurations**.
2. Click **New**.
3. On the form, fill in the fields:

Team Requests Configuration form

Field	Description
Table	Name of the table on which the conditions are applied. For example: Requested item
Request type	Field of the table on which the conditions are applied. For example: cat_item This field can be used to group the requests and display ${request_type} in singular and multiple records labels.
Request status	State of the request.
User field	User to whom the request is placed. For example: Requested for
Active	Option to activate or deactivate the team request configuration record.
Display Details	
Action type	Type of action displayed against the team request on, such as URL or Email.
URL	URL to be displayed against the team request.
Action icon	Display icon to be displayed against the team request.
Order	Order in which the team request configuration records are to be displayed. The team request configuration record with the lowest order number appears first, and the team request configuration record with the highest order number appears last on the user interface.
Single record display label	Text that must appear when a single request. For example: ${employee_name} requested for ${request_type}

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Field	Description
	Note: Use tokens in display labels to show dynamic variables to end users. Available tokens: ${employee_name}, ${request_type}
Multiple record display label	Text that must appear when multiple requests are displayed. For example: ${count} employee's requested for ${request_type} **Note:** Use tokens in display labels to show dynamic variables to end users. Available tokens: ${request_type}, ${count}

4. Click **Submit**.

Configure team data

Configure team data that you want to display on employee cards and modal in the Team members tab in Your team menu. Team data configurations are required to support column configurations and filter configurations.

Before you begin

Role required: sn_mh.admin

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **Team Data Configuration**.
2. Click **New**.
3. On the form, fill in the fields:

Team Data Configuration form

Field	Description
Name	Name of the team data configuration record. For example, team data configuration record is being created for **Leave**.
Table	Table on which you want to apply filter conditions. For example, table can be **Leave of absence**.
User field	Field of the table on which you want to apply conditions. For example, user field can be employee.
Conditions	Conditions applied on the selected table to display the required values. For example, conditions are being applied on **Leave of absence** table to pull the required details. Later, employee sys_IDs are pulled.
Use alternate label	Option to display a text when records match or do not match the team data configuration. For example: ○ **Use alternate label** to display leaves. ○ **Use alternate label** to display the number of incidents raised by any employee.
Alternate label	Value displayed when one or more records match the set conditions. For example:

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Field	Description
	○ **Alternate label** can be: On leave ○ **Alternate label** can be: ${count} incidents found
No data alternate label	Value displayed when no records match the set conditions. For example, **No data alternate label** can be: No incidents found
Advanced	Option to add a script to retrieve the preferred records. This option allows you to configure display values from multiple data-sources, control the values, and provide a hyperlink for the display values.

4. Click **Submit**.

Configure team column data

Configure column titles that you want to display on the Team members tab in Your team menu. For example, configure a column title to denote the current status of an employee such as new hire, or on leave.

Before you begin

Role required: sn_mh.admin

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **Team Column Configuration**.
2. Click **New**.
3. On the form, fill in the fields:

Team Column Configuration form

Field	Description
Column title	Name of the team column configuration record. For example, Location.
Order	Order in which the column must appear on the Team members tab in Your team menu.
Active	Option to activate or deactivate the team column configuration.

4. Click **Submit**.

What to do next

Associate the record to a team column data configuration.

1. In the Team Column Data Configuration related list, click **New**.
2. On the form, fill in the fields.

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Team Column Data Configuration form

Field	Description
Team column configuration	Name of the Team Column Configuration record. For example, Location.
Team data configuration	Team data configuration with which you want to associate the Team column configuration record. For example, User.
Table	Table that is associated with the team data configuration. This field gets auto-populated by selecting the Team data configuration. For example, sys_user
Column display fields	Fields of the table that you want to display on the Team members tab in Your team menu in Employee Center For example, you want to display time zone, city, state, and country fields (of employees) from the sys_user table on the Location column on the Team members tab in Your team menu in Employee Center
Order	Order in which you want to display the column display fields on the Team members tab in Your team menu in Employee Center. The column display field with the lowest order number appears first, and the column display field with the highest order number appears last on the user interface. **Note:** On the compact cards (list or grid view) there is a limit of what gets displayed, but on the employee modal all the data gets displayed. In addition, if no data is available for an employee for one of the team data records, the next one that is available in order gets displayed.

3. Click **Submit**

Configure team filters

Configure team filters that you want to display on the Team members tab in Your team menu. For example, a team filter can be Employee Type, which in turn contains other filters such as position and location type.

Before you begin

Role required: sn_mh.admin

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **Team Filter Configuration**.
2. Click **New**.
3. On the form, fill in the fields:

Team Filter Groups form

Field	Description
Filter title	Unique title for the filter group record. For example, Employee type.
Order	Order in which you want the group filter to appear on the Team members tab in Your team menu.

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Field	Description
Group all filters	Option to group filter. For example, you can group filters such as position and location type under one filter called Employee type.
Active	Option to activate or deactivate the filter group record. When you deactivate a filter group record, the record does not appear on the user interface.

4. Click **Submit**.

What to do next

Associate the filter to a team data configuration. Filter group is a UI shell, where you can configure display values and order related things. The data that is displayed in the filter group is fetched from a team data configuration.

1. In the **Team Filter Group Data** related list, click **New**.
2. On the form, fill in the fields.

Team Filter Group Data form

Field	Description
Label	Unique name of the filter group.
Team filter group	Name of the team filter group, for example, Employee Type.
Team data configuration	Contains configurations applied on table and fields of the table and so on. For example, for Employee Type the team data configuration is HR profile and Employee profile.
Table	Table associated with the team data configuration. It is selected by default after you have selected the team data configuration.
Column	Column to appear on the Your team tab.
Order	Order in which you want the filter to show up on the Team members tab in Your team menu.
Show select all option	Option to display **Select all in {}** in the filter on the Team members tab in Your team menu. Assume that there are 10 cities in a filter and if you want to provide an option to the user to select all the cities with a single link, then enable **Show select all option**.
Hide if all have same value	Option to hide the same filter values on the Team members tab in Your team menu. Assume that the **Hide if all have same value** option is selected and the **Show empty filter option** option is deselected; all the employees are residing in the same city, for example, London. In this case, the London filter will not appear on the Team members tab in Your team menu.
Show empty filter option	Option to display **No data** as a filter value so that managers can filter their employee list by users who do not have any data available.

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Field	Description
	Assume that the **Hide if all have same value** and **Show empty filter option** options are selected; all the employees are residing in the same city, for example, London. In this case, both London and No data values appear on the Location filter on the Team members tab in Your team menu. **Note:** **Show empty filter option** should not be selected if you only want managers to filter by data values that are available for their employees. For example, if this option is not selected and most employees are residing in London, but some do not have a location set in their user record then the manager will only have the option London to select from.

3. Click **Submit**.

Set up View as Direct Reports

Set up View as Direct reports to help managers guide their team members by viewing articles as seen by their direct reports on the Manager Hub.

Before you begin
Role required: admin

Note:

- Change the *glide.knowman.enable_view_as_user* default value to **True** for the View as feature to work. The default value for this system property is **False**.
- Update the portal system ID for *ec_portal_viewas_association* system property, in case you have a customized portal. Unless the default portal ID is changed to your customized ID, the feature does not work.
- The feature works with Tokyo and later family releases.

About this task
View as Direct report feature is useful for managers who have direct reports. Often, managers do not have access to certain location-specific or designation-specific Knowledge Base articles. Therefore, to help their respective team members, the managers can view the Knowledge Base articles as their respective direct reports.

Use the following procedure to customize the View as experience for your employees with direct reports.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the **Your team** drop-down list, select **Team members**.
3. To change the page view to **Primary** or **Secondary** depending on your preference, right-click on the page and select the **Instance options**.
4. **Optional:** To get a search engine experience, select **Primary** and select **Save**.

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Primary view option on View articles as page



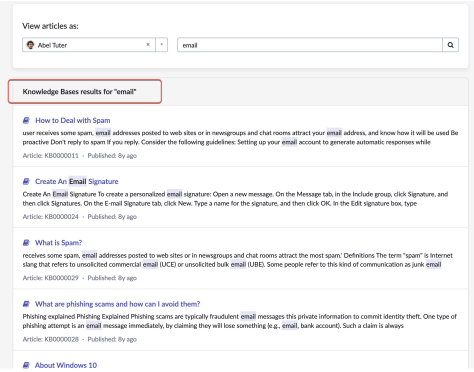
5. **Optional:** To get a compact user experience, select **Secondary** and select **Save**.

Secondary View option on View articles as page



6. **Optional:** Manage the number of Knowledge Base articles visible as a search result or add **Pagination** through the Search results **Instance options**.
The default result is 15 articles.

Search results for View as feature



Result

Set up the View as page experience, add pagination, and tweak the number of articles displayed as a search result to provide optimal user experience for a manager searching for Knowledge articles using the feature.

Configure daily stats

Configure daily stats records that you want to display on the Manager Hub. Daily stats can be information related to employee PTO, employee location, and so on.

Before you begin

Role required: sn_mh.admin

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **Team Daily Stats**.
2. Click **New**.

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3. On the form, fill in the fields:

Team Daily Stat form

Field	Description
Name	Name of the daily stat configuration record.
Display label	Display name of the daily stat record in the Manager Hub and Team members tabs in Your team menu.
Active	Option to activate or deactivate the daily stat configuration record.
Order	Order in which you want the daily stat record to appear in the Manager Hub and Team members tabs in Your team menu. The daily stat configuration record with the lowest order number appears first, and the daily stat configuration record with the highest order number appears last on the user interface.

4. Click **Submit**.

What to do next

1. In the **Filter sources** related list, click **New**.
2. On the form, fill in the fields.

Filter Sources form

Field	Description
Filter source	Filter configuration record that you want to associate the daily stat filter with.
Active	Option to activate or deactivate a filter group record.
All	Option to select all the filter values in the source at one time. For example, City is filter source. It contains cities such as Chicago, Hyderabad, Madison, and New York. If you want to select all the cities at time, select **All**. If you want to select only few cities, select **Options**.
Options	Option to select only specific filters values in the source.

3. Click **Submit**.

Configure to do mappings

Create additional conditions or mappings to display managerial tasks and requests.

Before you begin

Role required: sn_mh.admin

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Note:

- Prior to this Utah release, you could create additional conditions for to-do mappings using the To-dos Configuration form in Employee Center. Starting with the Utah release, you can create additional conditions for to-do mappings using the To-dos mapping module in Manager Hub.
- If you are upgrading to Utah release, additional conditions that were created for to-do mappings in the To-dos Configuration form in Employee Center must be created again in the To-dos mapping module in Manager Hub.

Procedure

1. Navigate to **All** > **Manager Hub** > **Administration** > **To-dos mappings**.
2. Click **New**.
3. On the form, fill in the fields:

To-dos mapping form

Field	Description
To-do filter condition	To-do filter condition on which additional conditions are applied. For more information on to-do filter condition, see Create or modify a to-dos filter.
Table	Read-only field that is picked from the To-dos configuration table. For example, HR Task [sn_hr_core_task].
Map parent	Option to enable the selection of reportee fields from the To-dos configuration table or its parent table.
Parent mapping reference field	Option to select a reference field from the parent table. **Note:** This option appears only when the **Map parent** field is enabled.
Parent Reportee fields	Option to select reportee fields from the parent table. For example, select reportee fields from the HR Case [sn_hr_core_case] table. **Note:** This option appears only when the **Map parent** field is enabled.
Reportee fields	Option to select reportee fields from the To-dos configuration table. For example, select reportee fields from the HR Task [sn_hr_core_task].
Active	Option to activate the use of additional filter conditions.
Order	Order in which additional filter conditions are applied.

4. Click **Submit**.

Configure widgets

Configure the widgets in the Manager Hub and Team Insights pages as per your business requirements.

Before you begin

Role required: sn_mh.admin, sp_admin

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Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Navigate to **Manager Hub** > **Team Insights**.
3. **CTRL+Right-click** on any widget and select **Page in Designer**.
   The Service Portal Designer page opens.
   a. In the Manager Hub prompts widget, click the **Edit** icon:
      - In **Title**, provide a suitable title to the widget.
      - In **Suggestion Categories**, specify the categories on which you want to apply the settings.
      - In **Presentation**, **Suggestion per row**, specify the number of prompts that you want to display in a row in the widget.
      - Click **Save**.
   b. In the About the team or Employee Journeys, click the **Edit** icon:
      - In **Section Title**, provide a suitable title to the widget.
      - In **Reports**, select the reports that you want to display in the widget. Specify the order in which you want the reports to appear in the widget.
      - In **PA widgets**, select the PA reports that you want to display in the widget.

        Note: For advanced chart configurations, use sysIDs from the Report and PA widgets tables.

      - In **Suggestion Categories**, specify the categories on which you want to apply the settings.
      - In **Chart Layout**, specify the number of charts in a row. The default value is two charts per row.
      - In **Chart height**, indicate the height of the chart.
      - In **Advanced**, add a script to customize and display content in the widget.
      - Click **Save**.

Use Manager Hub

Support your team and find resources to grow as leaders using the Manager Hub application.

Before you begin

- Role required: sn_mh.manager_hub_user
- Activate Manager Hub from ServiceNow Store. Manager Hub is available with the Employee Center Pro application. Some of the features of Manager Hub work only when the HR Service Delivery and Employee Journey Management applications are activated.
- Configure Manager Hub.

Procedure

1. Get your team brief.
2. Know your team members.
3. Get team insights.
4. Utilize Manager Library.
5. View and Edit Employees Growth Plans

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Get your team brief

Summarizes the most important information and actions for you to focus on. Displays items that need your attention, upcoming team events, and requests opened by your team members.

Before you begin

Role required: sn_mh.manager_hub_user

Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Navigate to **Your team** > **Manager Hub**.
3. View the time zones of employees across the globe.
   Be more conscious about the time the meetings are scheduled or requests are sent out to the team.
4. In the **Your Management tasks** widget, view the total number of tasks that require your approval.
   Selecting **All tasks** will navigate you to the To-dos page in Employee Center. Complete the required actions.
5. In the **Upcoming team events** widget, view the upcoming events such as employee birthdays, employee anniversaries, or new hire joining.
   Selecting the **Email** icon opens a mail-to link with work emails of intended reports in To field (default email client) with a blank subject line.
6. In the **Requests opened by your team** widget, view all the requests opened by your team members.
   Pay a closer attention to requests that are time sensitive and requires collaboration across the enterprise.

   Note: In addition to the sn_mh.manager_hub_user role, the logged in manager must also have the required ACLs or roles to view certain team requests. For example, if there are any open requests related to HR cases, then the logged in manager must also have the sn_hr_core.case_reader role to view those requests.

7. In the **Suggestion for you and your team** widget, act on items that require your attention.
   This widget appears only if prompts are generated for you. For more information, see Proactive Prompts for managers.
8. Review your team daily stats such as number of employees on leave, number of employees in onboarding, and so on.
   For more details, select **All team members**. You will be navigated to the **Team members** tab.

Proactive Prompts for managers

Recommend actions to managers based on collected data and best practices, help managers understand team insights, and guide them with next steps. Enable managers to act on potential issues proactively.

Before you begin

Role required: sn_mh.manager_hub_user

Ensure to activate Proactive Prompts application from ServiceNow Store.

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Procedure

1. Navigate to **All** > **Employee Center** > **Your team** > **Manager Hub**.
2. In the Suggestions for you and your team widget, work on your actionable items:

Insight-based suggestions

Suggestion	Description
Support your new Hire	Displays employees who are new hires. Support them better. ○ To mark the suggestion as complete, select ✔. ○ To dismiss the suggestion, select ✖. ○ To send an email to the new hires from your outlook, select **Email Employee**.
Encourage work-life balance	Displays employees who haven't taken a time off. Encourage work-life balance for your employees. ○ To mark the suggestion as complete, select ✔. ○ To dismiss the suggestion, select ✖. ○ To send an email to the employees from your outlook, select **Send Reminder**. ○ To open a KB article that has details on encouraging work-life balance, select **Learn why its important**.
Support your employees with learning	Displays employees who haven't taken up their assigned learnings. Check if they need time to focus on. ○ To mark the suggestion as complete, select ✔. ○ To dismiss the suggestion, select ✖. ○ To send an email to the employees from your outlook, select **Ask if they need help**.
Help your employee grow their career	Displays employees who haven't had a job change in a while. ○ To mark the suggestion as complete, select ✔. ○ To dismiss the suggestion, select ✖. ○ To learn about career conversations, select **Learn about career conversations**.

3. To set your preferences on the display of prompts:

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a. Select the Menu icon in the **Suggestions for you and your team** widget.

b. Select **Manage Preferences**.

c. Turn off the prompts that you do not want to view on the widget.
Your preferences will be saved and the prompts that have been turned off do not appear in the widget the next time you login to the Manager Hub page. You can change your preferences at any given time.

Generate team summary

Generate a summary from your team's data to quickly review activities, progress, and next steps.

Before you begin

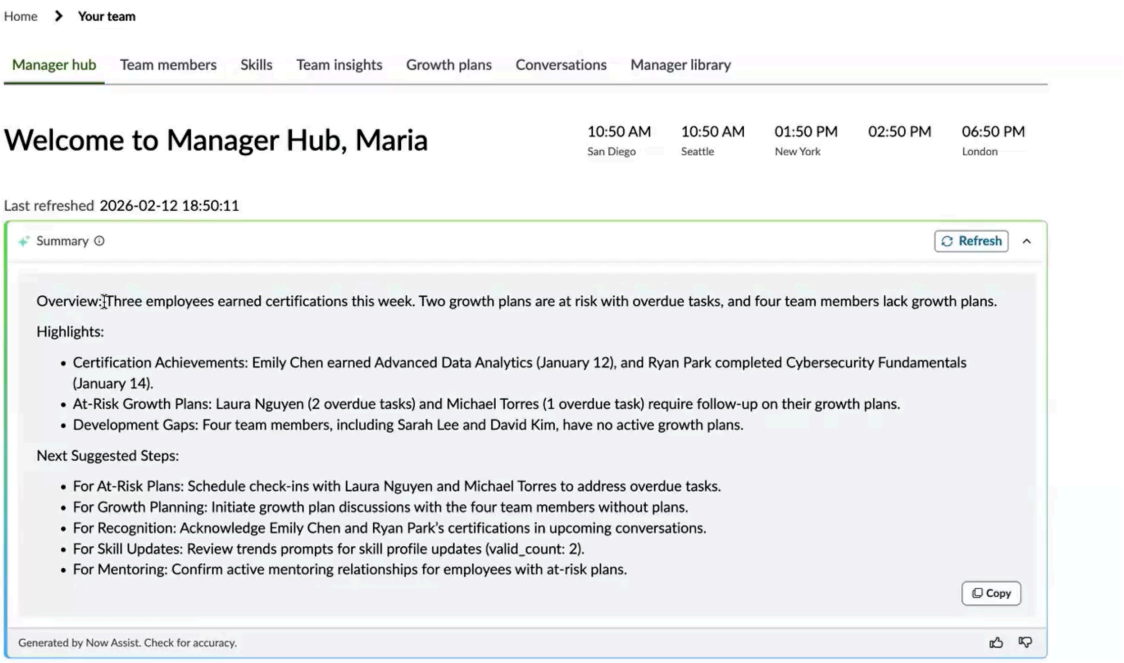
Ensure you have the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).

Configure the manager insights skill. For more information, see Configure manager insights for Now Assist for HRSD.

Role required: sn_mh.manager_hub_user

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center portal opens.
2. From the **Your team** drop-down list, select **Manager Hub**.
3. Select **Generate** on the **Generate summary for new updates** banner.
   A summary of your team's activities are



displayed.

Know your team members

Effectively manage a globally disbursed team. Understand your team's needs and activities to support them better.

Before you begin

Role required: sn_mh.manager_hub_user

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center portal opens.
2. From the **Your team** drop-down list, select **Team members**.
3. **Optional:** Select the **Direct team** tab to view details of employees reporting to you.
4. **Optional:** Select the **Indirect team** tab to view details of employees that are not part of your direct reporting line.
5. View details of your employees.
   - Focus on what the team is doing across multiple activities such as journeys, and growth and development (if Talent Development is installed).
   - Use the **Sort by** filter to filter data by employee name, type, location, or attention needed. If Talent Development is installed, filters can be applied on the outcome type of growth plans and on the learnings that the team members are currently pursuing.
   - Search for a specific employee by entering at least two characters in the **Search** field.
   - Select the Card view icon ( ) to view employee details in a card view.
   - Select the List view icon ( ) to view employee details in a list view.
6. Provide assistance to your skip level reporting employees when the direct reporting manager is unavailable, for example, on leave.
   To view details of your skip level employees along with your direct reporting employees, select the Settings icon ( ) in the **Direct team** tab, then enable the **Show skip level reports** option.

   You cannot view skip level reports of employees that are not part of your direct reporting line.
7. Select **View org chart** in the **Direct team** tab to view reporting structure of your employees.
8. Select an employee's name on the employee card to view the employee details modal.
   For more information, see View employee details.
9. Select the View menu icon ( ) on an employee card or employee modal, to schedule conversations, assign learning, and so on.
   For more information, see Use the View menu icon in Manager Hub.

Note: The actions on the employee card are configurable. For more information, refer to Action Framework in Employee Center

Set up View as Direct Reports

Set up View as Direct reports to help managers guide their team members by viewing articles as seen by their direct reports on the Manager Hub.

Before you begin

Role required: admin

Note:

- Change the *glide.knowman.enable_view_as_user* default value to **True** for the View as feature to work. The default value for this system property is **False**.
- Update the portal system ID for *ec_portal_viewas_association* system property, in case you have a customized portal. Unless the default portal ID is changed to your customized ID, the feature does not work.
- The feature works with Tokyo and later family releases.

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About this task

View as Direct report feature is useful for managers who have direct reports. Often, managers do not have access to certain location-specific or designation-specific Knowledge Base articles. Therefore, to help their respective team members, the managers can view the Knowledge Base articles as their respective direct reports.

Use the following procedure to customize the View as experience for your employees with direct reports.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the **Your team** drop-down list, select **Team members**.
3. To change the page view to **Primary** or **Secondary** depending on your preference, right-click on the page and select the **Instance options**.
4. **Optional:** To get a search engine experience, select **Primary** and select **Save**.

Primary view option on View articles as page



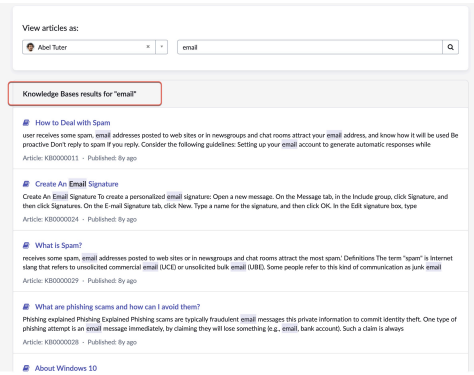
5. **Optional:** To get a compact user experience, select **Secondary** and select **Save**.

Secondary View option on View articles as page



6. **Optional:** Manage the number of Knowledge Base articles visible as a search result or add **Pagination** through the Search results **Instance options**.
   The default result is 15 articles.

Search results for View as feature



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Result
Set up the View as page experience, add pagination, and tweak the number of articles displayed as a search result to provide optimal user experience for a manager searching for Knowledge articles using the feature.

View employee details

Use the employee modal for a quick overview of your employee's details.

Before you begin
Role required: sn_mh.manager_hub_user

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center portal opens.
2. From the **Your team** drop-down list, select **Team members**.
3. Select an employee from the employee list.
4. View the details on the card.

Employee details modal

Field	Description
Location	Local time and location where your employee is assigned to report.
Status	Status of your employee.
Contact	Contact information of your employee.
Reports	Number of direct and indirect reportees reporting to your employee.
In progress	Shared learnings, conversations and growth plans of your employee that are currently in progress.
Upcoming events	List of scheduled events.
Requests	List of requests that have been submitted for review or action. This includes current state of each request such as Approved, in progress or awaiting.
Things that might need your attention	List of learnings, growth plans and journeys that require immediate attention.
Open tasks	List of tasks and requests in the Open state.

Get team insights

Find data visualizations about your team, their service requests, journeys, and learnings.

Before you begin
Role required: sn_mh.manager_hub_user

Procedure
1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.

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2. Navigate to **Your team** > **Team Insights**.
3. In the **About the team** widget, view the skip level reports and direct reports of: Employees leaves (Used and Unused PTO), employees tenure in the organization, and the time spent by employees in their current roles.
4. In the **Service and support** widget, view reports on type and number of requests raised by your team (IT requests, HR requests except life cycle requests), time taken to resolve the requests, requests open at an organization level, and requests that have been assigned to you and by you.
5. In the **Employee journeys** widget, view skip level reports and direct reports of: Current status of your employee journeys (risk or draft or in progress) and journeys started this year.
   Get a breakdown of journeys by its type: Career growth or Onboarding.

   Note: This widget appears only when you install the Journey Designer application.

6. In the **Understanding employee journeys** widget, click **Start a journey**.
   Using a template, you can tailor specific experience for your team members to help them with transitions, growth, personal, and career events.

   Note: This widget appears only when you install the Journey Designer application.

Know your team's skills

Understand the current skills and the targeted skills of the team so that you're empowered to develop the right skill-set in the team for today's and tomorrow's business requirements. Help your employees utilize different tools of Talent Development such as learning, growth plans, mentoring to build new skills or bridge existing skill gaps.

Before you begin

- Role required: sn_mh.manager_hub_user
- Ensure that the Skills Foundation application is installed.
- Skills or job role implementation is mandatory. This is driven by a system property. If this is set to false, the Skills tab does not appear in Manager Hub.

Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Open **Your team** > **Skills**.
3. In the Skills Summary section, view all skills, top strengths, and areas of growth of your team.
   For more information, see Skills summary of your team.
4. In the Skills distribution section, view skills possessed by your team, across all proficiency levels, by job functions.
   Get a deep-dive understanding of skills from the Skills distribution page. For more information, see View the skill distribution of your team.
5. From the Skills Expectations section, view score percentages of an employee based on an employee's validated skills and proficiencies, compared to their role-based skill requirements.
   For more information, see View employee cards in Skills Expectations section.
6. In the Skills being learned section, view employees who are pursuing a specific skill.

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For more information about a skill being learned, select ⋮ and select **View skill details**. To view all the skill learning cards, select **View all**.

Note: For the Skills being learned section to surface data, you must install Learning and Talent Development applications and associate them with skills.

Skills summary of your team

Do a deeper analysis of skills of your team. Understand your team's top strengths and areas of growth.

The following details are displayed in the Skills Summary section on the Skills page:

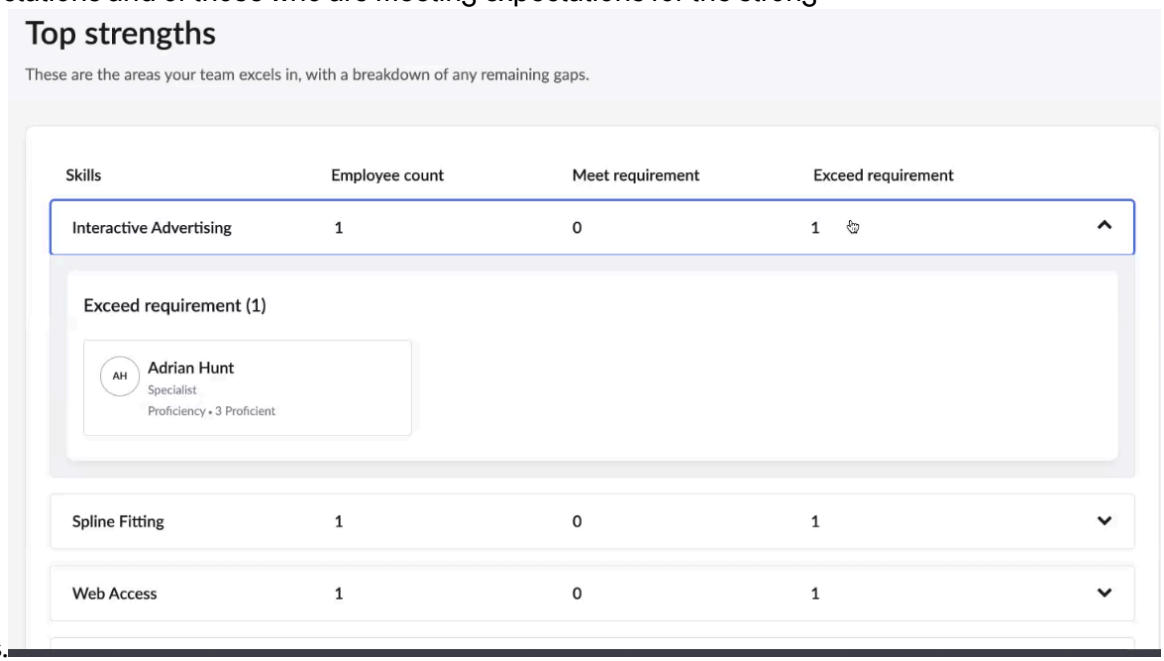
All skills

Helps you understand the total number of skills in your team along with the split of total required skills for the team members and the total additional skills of the team members.

Top Strengths

Highlights the strong skills in your team and provides the details of the team members who posses those strong skills.

Selecting the **View all** option provides granular details such as the proficiency levels of the individuals for the strong skills.



Areas for growth

Helps you to understand the skills in the team that need attention along with the details of team members who might need upskilling.

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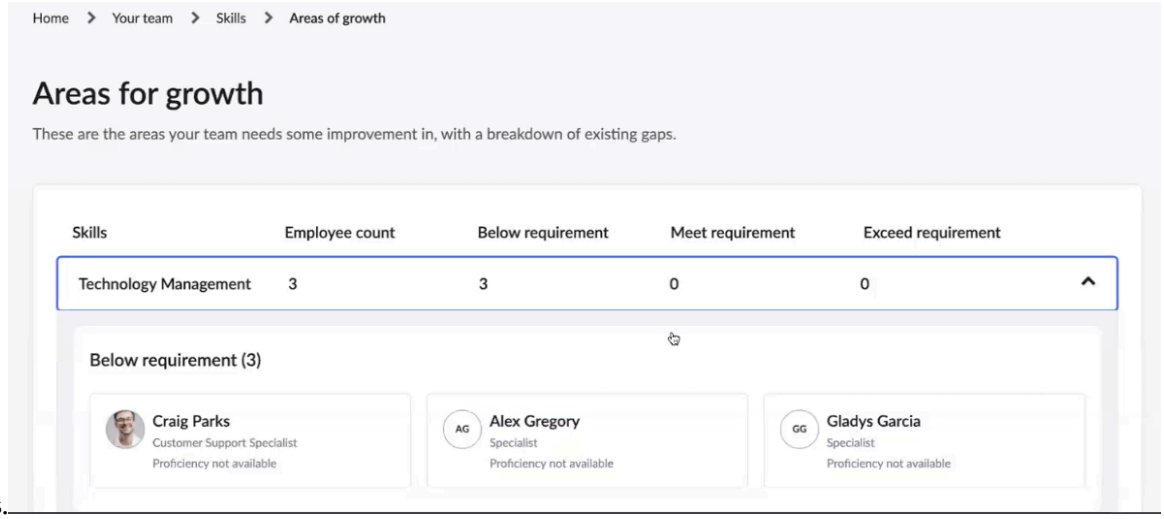
Selecting the **View all** option provides granular details such as the proficiency levels of the individuals for these skills.



Note: Employees must add proficiency levels to their skills. This data helps to compute top strengths and areas of growth.

View the skill distribution of your team

Get a deep-dive understanding of the skills on your team. Get an overview of different skills that the team members possess along with the count of people across each skill in the team.

Before you begin

Role required: sn_mh.manager_hub_user

Note: Employees must add proficiency levels to their skills. This data helps you to view details of skill distribution.

Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Open **Your team** > **Skills**.
3. In the Skills distribution section, select **View all**.
   The Skills distribution page opens.
4. If you have team members reporting from different job functions, you can filter the skill distribution for each job function from the View list.
5. In the **Skill view** tab, you can perform the following actions:

Skill view tab features

Name of the card	Steps
Employee card	On an employee card, select ⋮. Select any of the following options: ○ **Validate skills**: Validate employee skills page appears: **a.** Review the current skill proficiencies of the employee, select any skills you want to validate. **b.** Select **Validate selected skills**.

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Name of the card	Steps
	Note: Employee credentials from Credly are also displayed in the activity stream. ○ **View skills**: Skill details page appears. For more information, see Skill details of an employee. ○ **View profile**: The employee profile page appears with details such as reporting structure, coworkers, designation of employee.
Skill card	On a skill card, select ⋮, then select **View skill details**. A modal opens providing more details about the skill.

6. In the **Employee view** tab, you can perform the following actions:

Employee view tab features

Name of the card	Steps
Employee card	On an employee card, select ⋮. Select any of the following options: ○ **View skill details**: Skill details page provides granular details of employee skills, proficiency levels, and gaps. For more information, see Skill details of an employee. ○ **Validate for employees**: Validate skills page appears: **a.** Select the employees that you like to validate this skill for, and review their proficiency rankings. **b.** Select **Validate selected employees**.
Skill card	On a skill card, select ⋮, then select **View skill details**. A modal opens providing more details about the skill.

View employee cards in Skills Expectations section

View the score percentages of an employee based on an employee's validated skills and proficiencies, compared to their role-based skill requirements.

Before you begin

Role required: sn_mh.manager_hub_user

Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Open **Your team** > **Skills**.
3. In the Skills Expectations section, select ⋮ on an employee card and select any of the following options:

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View menu options

Option	Steps
Validate skills	**a.** Review the current skill proficiencies of an employee, and then select any skills you want to validate. **b.** Select **Validate selected skills**. **Note:** For Score analysis, you must validate the skills.
View skills	Skill details page provides granular details of employee skills, proficiency levels, and gaps. For more information, see Skill details of an employee.
View profile	The employee profile page appears with details such as reporting structure, coworkers, designation of employee.

4. In the Skills Expectations section, select **Score analysis** on an employee card to view the score percentage of the employee's validated skills.

   a. **Optional:** Hover over the tool tip in the flyout to see criteria for skill proficiency levels.

   b. Select **Assign learning** in the **Validated** skills section to view progress bars of skills that meet and don't meet expected proficient levels.

   c. Select the Skill pill icon ( ) on a skill to perform one of the following:

   - **View skill details**: View a detailed description of the skill.
   - **Assign learning**: Assign a learning course to an employee. For more information, see Assign learning form.

5. To view all the employee cards, select **View all**.
6. If you have team members reporting from different job functions, you can filter the skill distribution by job function.

Skill details of an employee

Get a deeper understanding of skill details of an employee, proficiency levels, and gaps.

On an employee card, when you select and select the **View skills** option, the Skill details page appears. In this page, you can:

- View the skills possessed by an employee and proficiency levels of each skill.
- Filter skills by validated versus unvalidated skills.
- Sort skills by name or skill gap (High to Low) or (Low to High).
- Assign a learning course to the employee when the proficiency level of a skill is low. Select and select **Assign learning**. Only the courses related to that skill are displayed for selection.
- Select a skill to view the skill activities fly-out. The skill activities fly-out allows you to review activities such as courses, aspirations and growth plans that contribute to skill proficiency.

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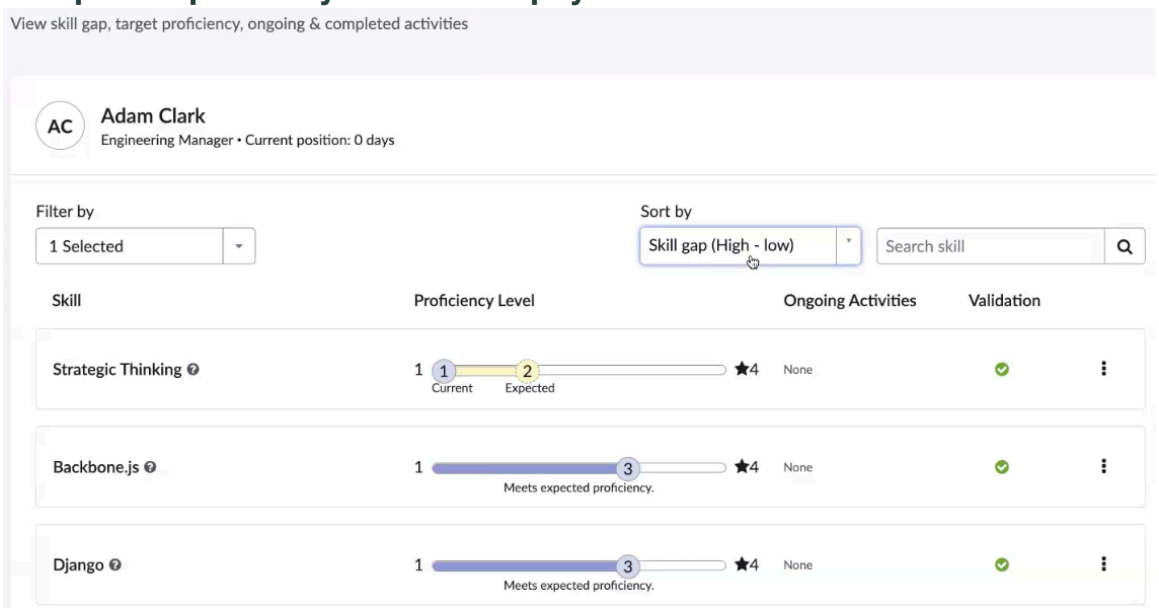
Example: Skill proficiency levels of an employee



Utilize Manager Library

Discover curated and personalised leadership resources for multiple departments and systems. Get tools and resources to efficiently manage your team and self.

Before you begin

Role required: sn_mh.manager_hub_user

About this task

Personalised and seasonally-based content from target communications and campaigns, knowledge or catalog items (ServiceNow), share point sites, or other third party applications can also be added to Manager Library. The necessary configurations can be done by a user with the sn_mh.admin role.

Procedure

1. Navigate to **All** > **Employee Center**.
   The Employee Center portal opens.
2. Navigate to **Your team** > **Manager Library**.
3. Find information on corporate initiatives to focus on for the quarter, such as annual goals and feedback.
4. Use resources on career development, leader enablement, hiring and transitions, managerial events, employee performance evaluation, or other managerial tools to help you work efficiently.
5. Click the quick links that navigate you through ServiceNow applications that are integrated with Manager Hub.
   For more information, refer to Integrate Manager Hub.

Use the Employee Summary Virtual Agent topic in Manager Hub

Activate and use the Employee Summary Virtual Agent topic to access employee contribution summaries, view consolidated profiles, and track employee progress.

Before you begin

To access and use the Employee Summary reports topic, the following plugins must me activated:

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- Now Assist for HR Service Delivery (HRSD) (sn_hr_gen_ai)

The following plugins are optional:

- Employee Connections (sn_ecn)
- Career Conversations (sn_egd_act)
- Learning (sn_lep)
- Learning Core (sn_lc)
- Manager Hub (sn_mh)
- Employee Goals (sn_egd_goals)

Role required: admin

Procedure

1. Turn on the **Employee information summarization** skill.
   a. Navigate to **All** > **Now Assist Admin** > **Skills**.
   b. On the navigation panel, select **Employee**, then select **HRSD**.
   c. On the **Employee information summarization** card, select **Turn on**.
2. Publish the **Employee Summary** Virtual Agent topic.
   For more information, see Publish a Virtual Agent topic.
3. View the Employee Summary reports topic.
   For more information, see View employee summary reports.

Integrate Manager Hub

Extend Manager Hub capabilities by integrating with other applications.

Integration with Journey Accelerator

Use the Journey Accelerator templates to create and publish customized plans for key employee transitions. Create and access the journey plans from Manager Hub in Employee Center.

For this integration to work, you must install Manager Hub, Journey Accelerator, and Employee Center Pro applications.

Integration with Journey Designer

Facilitate daily activities among various cross-functional processes and departments, and automate processes such as new hire onboarding.

For this integration to work, you must install Manager Hub, Journey Designer, and Employee Center Pro applications.

Integration with Enterprise Employee Experience Pack

Administer and coordinate your employees return to the workplace in a manner that promotes your company's safety requirements. Click the Manage return to office link in the Manager Library tab in Employee Center.

For this integration to work, you must install Manager Hub, Enterprise Employee Experience Pack, and Employee Center Pro applications.

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Integration with Employee Relations COE

Report any misconduct or sensitive issues through the Employee Relations application, which provides a tighter security to protect employee privacy. Click the Report misconduct employee quick link in the Manager Library tab in Employee Center.

For this integration to work, you must install Manager Hub, Employee Relations, and Employee Center Pro applications.

Integration with Human Resources Scoped App

Contact an HR personnel by clicking the Ask HR quick link in the Manager Library tab in Employee Center.

For this integration to work, you must install Manager Hub, Human Resources Scoped App application, and Employee Center Pro plugins.

Integration with Content Experiences

Find useful articles and resources that help to expand your skills as a people leader. Use the Manager Library tab in Manager Hub in Employee Center.

Personalised and seasonally-based content from target communications and campaigns, knowledge or catalog items (ServiceNow), share point sites, or other third party applications can also be added in Manager Library.

Manager Library is available with Content Experiences application.

Integration with Employee Center Core

Complete your tasks and approve any team requests from the Overview tab in Manager Hub in Employee Center.

Team tasks and requests appear only when the Employee Center Core application is installed.

Integration with Proactive Prompts

Provide prompts in the Team Insights page in Manager Hub. Encourage managers or employees to take actions quickly.

For this integration to work, you must install Manager Hub, Proactive Prompts and Employee Center Pro applications.

Reference for Manager Hub

Reference topics provide additional information about user roles, tables, and default configurations in Manager Hub.

Components installed with Manager Hub

Several types of components are installed with activation of the Manager Hub [sn_mh] plugin, including tables, user roles, and scheduled jobs.

Demo data is available for this feature.

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Roles installed

Roles in Manager Hub

Role title [name]	Description	Contains roles
Manager Hub Admin [sn_mh.admin]	Grants write access to Manager Hub contents. A Manager Hub administrator can: • Activate and run the Add Manager Hub user role scheduled job to assign the Manager Hub user role to new people managers. • Manually assign the Manager Hub user role to new people managers. • Configure team data, team request, important dates records, team column data, team filters, and daily stats records to display data on Manager Hub.	• sn_mh.manager_hub_user • sn_mh.content_manager
Manager Hub Content Manager [sn_mh.content_manager]	Grants read access to Manager Hub contents. A Manager Hub Content Manager can view team data, team requests, important dates, team column data, team filters, and daily stats configuration records.	
Manager Hub User [sn_mh.manager_hub_user]	Can view information about their reporting employees in Manager Hub.	Knowledge view role

Tables installed

Tables installed with Manager Hub

Table	Description
Important Dates Configuration [sn_mh_important_dates_config]	Stores configuration records of important dates.
Team Column Configuration [sn_mh_team_column_config]	Stores configuration records of team columns.
Team Daily Stat [sn_mh_team_daily_stat]	Stores configuration records of team daily stats.
Team Data Configuration	Stores configuration records of team data.

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Tables installed with Manager Hub (continued)

Table	Description
[sn_mh_team_data_config]	
Team Column Data Configuration [sn_mh_team_data_m2m_column]	Stores mappings of columns and team data.
Team Filter Group Data [sn_mh_team_data_m2m_filter_group]	Stores configuration records of team filter group data.
Team Filter Group [sn_mh_team_filter_group]	Stores configuration records of team filter groups.
Filter sources [sn_mh_team_m2m_filter_sources]	Stores configuration records of filter sources.
Team Requests Configuration [sn_mh_team_requests_config]	Stores configuration records of team requests.

Campaign configurations for Manager Hub

Default campaign configurations are available to use after you have activated Manager Hub Campaigns display predefined content on Manager Hub.

The Manager Library campaign is published by default. It displays a banner with the following content on the Manager Library tab in Your team menu.

Manager Library campaign

Campaign content	Description
Employee voice	View information on Employee Voice Survey (EVS). Review the EVS results of your team and focus on areas that have received lesser score.
Annual goals	Use the guide or a tool that helps to set your annual goals.
Coaching and feedback	Learn best practices on giving feedback and honing your coaching style.

Note: The Manager Hub example campaign is also available to use. You must publish the campaign to display a banner on the Manager Hub page in Your team menu.

For more details on these campaigns, navigate to **All** > **Content Experiences** > **Configurations** > **Campaign Content**.

Default configurations for important dates

Predefined set of important dates configurations are available to use once you have activated Manager Hub from ServiceNow Store.

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Important dates configurations

Name	Description
Employee birthday	Configuration to display employees birthdays.
Employee anniversary	Configuration to display employees anniversaries.
Employee time off	Configuration to display employees time offs.
Employee leave of absence	Configuration to display employees long leaves, such as parental leaves.
Employee joining date	Configuration to display employees joining dates.
Employee leaving date	Configuration to display employees leaving dates.

For more details, navigate to **All** > **Manager Hub** > **Administration** > **Important Dates Configuration**.

Default configurations for team requests

Predefined set of team request configurations are available to use after you have activated Manager Hub from ServiceNow Store.

OOB team requests configurations

Request type	Description
cat_item	Configuration to display items (of type hardware and software) that are requested by an employee.
hr_service	Configuration to display cases (except for employee relations cases) opened by an employee.

For more details, navigate to **All** > **Manager Hub** > **Administration** > **Team Requests Configurations**.

Default configurations for team data

Predefined set of team data configurations are available to use once you have activated Manager Hub from ServiceNow Store.

The following team data configurations support column configurations and filter configurations: Journey, Email, Employee Journeys, Employee Profile, HR Profile, Journeys, Leave, Leaving soon, New hire, PTO, Upcoming leave, User, and Work phone.

For more details, navigate to **All** > **Manager Hub** > **Administration** > **Team Data Configuration**.

Default configurations for team column data

Predefined set of team data configurations are available to use after you have activated Manager Hub from ServiceNow Store.

Team column configurations

Name	Description
Status	Configuration to display the status of an employee on the Team members tab in Your team menu in Employee Center. For example, the status of an employee can be a new hire or leaving the organization.

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Team column configurations (continued)

Name	Description
Location	Configuration to display employee location details based on time zone, city, state, or country.
Active Journey	Configuration to display active employee journeys, such as onboarding, or career growth.
Contact	Configuration to display employee contact details, such as email and work phone.

For more details, navigate to **All** > **Manager Hub** > **Administration** > **Team Column Configuration**.

Default configurations for filter groups

Predefined set of filter group configurations are available to use after you have activated Manager Hub from ServiceNow Store.

Team filter groups configurations

Name	Description
Journey	Configuration to group career growth and onboarding employee journeys under Journey filter in the Team members tab in Your team menu.
Employee type	Configuration to group employee type, position, and location type under the Employee type filter group in the Team members tab in Your team menu.
Location	Configuration to group cities under the Location filter group in the Team members tab in Your team menu.
Status	Configuration to display employee PTO, leave, or new hire under the status filter group.

For more details, navigate to **All** > **Manager Hub** > **Administration** > **Team Filter Configuration**.

Default configurations for daily stats

Predefined set of daily stat configurations are available to use once you have activated Manager Hub from ServiceNow Store.

Team daily stats configurations

Name	Description
On journeys	Configuration to display the total number of active employee journeys.
Onboarding	Configuration to display the total number of employees who are onboarding.
On PTO	Configuration to display the total number of employees who are on PTO .
On leave	Configuration to display the total number of employees who are on long leaves, such as parental leaves.

For more details, navigate to **All** > **Manager Hub** > **Administration** > **Team Daily Stats**.

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Default configurations for To do's

Default set of To do's configurations are available to use after you have activated Employee Center Core. These configurations display managerial tasks and requests in Manager Hub.

To dos filters is a module within Employee Center. For more details on how to configure the filters, see Create or modify a to-dos filter

To-do's filter

Name	Description
Approvals	Filters to display requests that require approval of a manager.
My team tasks	Filter to display team tasks to a manager.

The following filter conditions are also available: HR approvals, HR tasks, HR tasks for UR, Journey accelerator to-dos, Journey accelerator to-dos- Adhoc, Request approvals, Universal task, and UR approvals.

For more information on the filters, navigate to **Employee Center** > **Administration** > **To-dos configuration** > **To-dos filters**.

For more information on the filter conditions, navigate to **Employee Center** > **Administration** > **To-dos configuration** > **To-dos config filter conditions**.

Default proactive prompts for Manager Hub

Default signal configurations, signal categories, and an action URL are available to use on activating Manager Hub and Proactive Prompts.

To learn how to use Proactive Prompts, refer to the Proactive Prompts documentation.

Signal configurations

For detailed information on how to configure signals in Proactive Prompts, see Configuring Proactive Prompts.

Default signal configurations

Field	Description
Assigned learning lack of engagement	Default signal configuration to display the **Support employees with learning** widget in the Manager Hub page. This configuration is available only when the Learning Core application is installed. A schedule job runs every two weeks and identifies users based on the following criteria. These users are displayed to the manager in the **Support employees with learning** widget. • learning course or path has been assigned by the manager • assignment date is one month or more in the past • learning course in not in Work in progress or completed state
Time since job change	Default signal configuration to display the **Help your employee grow their career** widget in the Manager Hub page. This configuration is available only when Human Resources Scoped App: Core plugin is installed.

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Default signal configurations (continued)

Field	Description
	A scheduled job runs every six months and identifies users based on this criterion: 36 months or more since the start date of current job role.
Employee hasn't taken PTO	Default signal configuration to display the **Encourage work-life balance** widget in the Manager Hub page. This configuration is available only when Human Resources Scoped App: Core plugin is installed. A scheduled job runs every three months and identifies users using one of the following criteria: • time-off balance is 50% or more of the total available and is October 1 or later in the current calendar year • last date when the time off was taken was 6 months or more in the past and time off balance is more than zero
New hire above average requests	Default signal configuration to display the **Support your new hire** widget in the Manager Hub page. This configuration is available only when the Human Resources Scoped App: Core plugin is installed. A scheduled job runs every 14 days to identify users based on the following criteria: • employee start date is 30 days or less in the past • employee has opened six or more requests in the past 14 days • requests are either HR case (except life cycle event case), or catalog item is software or hardware request, or a single request of high priority • requests are not closed complete

Signal categories

Signal categories are the logical groups to divide signals. Signal categories enable you to pull category-specific prompts on the prompt widget.

Career, Employee service, New hire, Team insights, and Well-being are the default signal categories that are available for Manager Hub. For more information on these signal categories, see Configure signal categories in Proactive Prompts.

Signal actions

Signal actions enable end users who receive the prompt to act on them. **Open a URL** is the default signal action that is available for Manager Hub.

For more information on signal actions, see Configure signal actions for Proactive Prompts.

Use the View menu icon in Manager Hub

Use the View menu icon ( ) to view org menu, interact with an employee or assign a learning course.

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View menu actions

Action	Description
View org chart	View reporting structure of an employee.
Schedule conversation	Schedule a conversation with an employee. If you have the Microsoft Outlook integration for Manager Hub, the Schedule a conversation form opens. For more information, see Schedule a conversation form. If you don't have the Microsoft Outlook integration for Manager Hub, the Create a conversation form opens. For more information, see Create a conversation form.
View profile	View the profile of an employee.
Send email	Send an email to an employee. This action opens a link with the work email of your employee in the To field (default email client), and an empty subject line.
Call	Call an employee.
Assign learning	Assign a learning course to an employee. For more information, see Assign learning form. **Note:** You can only assign learning for direct reports.
View articles as employee	View articles visible to an employee. **Note:** You can only view articles visible to your direct reports.

Assign learning form

Use the Assign learning form to assign a learning course to an employee.

Assign Learning form

Field	Description
Assign this learning to	Employee to whom you want to assign the learning course.
Assigned material	Learning course that you want to assign to employee.
Assignment description	Additional information about the learning course.
This task is optional	Option to indicate that the learning assignment is optional.
Due by	Date by which you want the employee to complete the course.

Create a conversation form

Use the Create a conversation form to schedule a conversation with an employee when the Microsoft Outlook integration isn't enabled for Manager Hub.

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Create a conversation form

Field	Description
Organizer	Name of the manager scheduling the conversation.
Have this conversation with	Name of the employee with whom you want to converse.
Conversation title	Name of the conversation. You can update this value.
Date	Date of the conversation. The format is <YYYY-MM-DD>. You can use the Show Calendar for Date icon to select a date.
Reoccurs	The frequency at which the conversation occurs.
Send invite	Select **Send invite** to schedule the conversation. The scheduled conversation appears in a new tab. You can update talking points, action items, or any other notes required for the conversation.
Cancel	Close this conversation.

Schedule a conversation form

Use the Schedule a conversation form to schedule a conversation with an employee when the Microsoft Outlook integration is enabled for Manager Hub.

Schedule a conversation form

Field	Description
Organizer	Name of the manager scheduling the conversation.
Have this conversation with	Name of the employee with whom you want to converse.
Conversation title	Name of the conversation. You can update this value.
Date	Date of the conversation. The format is <YYYY-MM-DD>. You can use the Show Calendar for Date icon to select a date.
Reoccurs	The frequency at which the conversation occurs.
Select an available date and time	Visual representation of your and your employee's calendar to schedule meetings based on available time slots.
Additional details	Give the recipient more information about the scheduled conversation by including additional details.
Send invite	Select **Send invite** to schedule the conversation.

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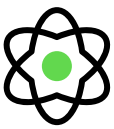
Schedule a conversation form (continued)

Field	Description
	The scheduled conversation appears in a new tab. You can update talking points, action items, or any other notes required for the conversation.
Cancel	Close this conversation.

Leader Hub

Leader Hub empowers organizational leaders to understand the strengths of their teams, identify gaps in skills, and facilitate changes that are simultaneously conducive to their workforce and the achievement of desired business outcomes.

Get started

Explore  Learn how leaders and supporters use Leader Hub.	Install and configure  Install the Leader Hub app from the ServiceNow Store. As an administrator, you can configure application features based on the specifications set by your organization.	Integrate  Extend the capabilities of the Leader Hub app by integrating with applications in the Talent Development suite.
Using  View and analyze data about your organization's talent to drive performance and foster growth.	Reference  Get details about components like fields, tables, and properties.	

Troubleshoot and get help

- Ask questions and explore other resources for Leader Hub in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Leader Hub

The Leader Hub app provides organizational and HR leaders with visibility into their organization's talent so they can comprehensively understand the landscape of their workforce. This application helps leaders gauge their team's strengths and deficiencies to confirm their employees have the appropriate skills and expertise to succeed in the present and future.

Leader Hub overview

Leader Hub gives organizational leaders the tools to grasp their teams' capabilities, recognize skill gaps, and implement changes that support their workforce while advancing key business objectives.

Leader Hub users

Users

User	Description
Organizational or HR leaders	Organizational and HR leaders use Leader Hub to analyze data associated with their organization's talent. Equipped with this data, they can make informed decisions that shape the culture, productivity, and overall success of their organization.
Organizational supporter	Organizational supporters entrusted with tasks and responsibilities use Leader Hub to view their designated leader's organization. With access to Leader Hub, they can provide support in the capacity required for the organization to succeed.

Leader Hub benefits

Leader Hub benefits

Benefit	Feature	Users
Get quick access to a comprehensive overview of your organization's talent. This encapsulated data includes metrics for skill competency across different teams, identifying significant skill gaps, and employee engagement with the growth tools provided in the Talent Development suite of applications.	At a glance	Organizational or HR leaders
Gain visibility into the skills and talent composition of each team that exists within	Org talent	Organizational or HR leaders

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Leader Hub benefits (continued)

Benefit	Feature	Users
your organization. View talent data at any level of granularity, through an organizational chart that illustrates the reporting relationships across the different teams in your organization.		
Obtain a holistic view of the skill composition associated with your organization. View skills relevant to your organization and metrics that you can use to identify critical skill gaps. This data can be used to hold managers responsible for developing talent within their teams.	Org skills	Organizational or HR leaders
Give organizational supporters to whom the leader has delegated responsibilities access to Leader Hub. Supporters can view their designated leader's organization and provide support accordingly.	Orgs you support	Organizational supporter

What to explore next

To learn more about configuring and using Leader Hub, see:

- Installing and configuring Leader Hub
- Using Leader Hub
- Leader Hub reference

At a glance page

The At a glance page provides your organizational and HR leaders with instant access to a comprehensive overview of their organization's talent. This page offers a glance at data that measures employee engagement and skill proficiency, along with a glimpse of the teams that comprise your organization.

The At a glance page is the home page for Leader Hub and it gives leaders quick and easy access to the following information about the teams in their organization:

- Skill scores
- Significant skill gaps
- Employee engagement with the growth tools available in the Talent Development suite of applications.

To access the At a glance page, navigate to the Employee Center and select **At a glance** from the Leader hub drop-down list.

At a glance widgets

At a glance page widgets

Widget	Description
Insight-based suggestions	Widget contains proactive prompts to enable proactive engagement from leaders by

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At a glance page widgets (continued)

Widget	Description
	bringing actionable insights as prompts into their flow of work. By default, one signal is configured to prompt leaders to review significant skill gaps.
Org talent	Provides a glance at the data that appears on the Org talent page. Widget contains a short list of cards that provide data about the talent associated with an employee's team. A link to view all teams on the Org talent page is provided for quick access to the entire talent composition data set.
Skill growth area	Provides a glance at the data that appears on the Org skills page. Widget contains the top five skills with the largest skill gaps. A link to view all skills on the Org skills page is provided for quick access to the entire skill composition data set.
Growth engagement	Widget contains north-star and drill-down metrics that measure employee engagement with the growth tools provided in the Talent Development suite of applications.

Org talent page

The Org talent page provides your organizational leaders with a centralized location to view the talents of each team that exists within their organization.

Leaders can view talent data at any level of granularity through an interactive organizational chart. This organizational chart illustrates the structure of the leader's organization and the reporting relationships across the different teams in their organization.

The organizational chart displays a card for each employee in the leader's organization. To improve the traversing experience, the cards for each employee appear in an organizational hierarchy. The employee cards in the organizational chart appear in the following order from top to bottom:

1. Organizational leader
2. Employees who lead a team within the leader's organization
3. Employees who are individual contributors

Leader's can use the organizational chart or the **Search for employees in your org** field to find and select employees who work for their organization.

To access the Org talent page, navigate to the Employee Center and select **Org talent** from the Leader hub drop-down list.

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Org talent widgets

Org talent page widgets

Widget	Description
Search for employees in your org	Widget is a search bar that appears above the organizational chart. Search results appear after you enter three or more characters. Search results include the following information about the employee: • Name • Job title • Department

Team details page

The Team details page provides your organizational leaders with visibility into the skills and talent composition of a team that exists within the leader's organization.

The Team details page is embedded into the Org talent page. To access the Team details page, perform the following steps after you navigate to the Employee Center and select **Org talent** from the Leader hub drop-down list:

1. Select a card for an employee who leads a team within the leader's organization.
2. Select the **View team details** button on the card for the employee that you selected.

Team details widgets

Team details page widgets

Widget	Description
Growth engagement	Widget contains metrics that measure employee engagement with the growth tools provided in the Talent Development suite of applications.
Team skill score	Widget displays a skill score associated with a team in the leader's organization. This score measures the number of people, in a specific team, who have achieved the proficiency levels necessary for each skill required by the roles in that team. A score of 100 means that the requirements are met. This widget also reflects a list of skills on which the team must improve the most.
Employee work arrangement	Widget reflects a distribution of team members by work arrangements (for example, on-site, remote, hybrid).
Range of years spent at the company	Widget reflects a distribution of team members by tenure at the company. Administrators can

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Team details page widgets (continued)

Widget	Description
	configure the following components for the data that appears in this widget: • Up to six segments • The time range for each segment **Tip:** For more information about the configuration process, see Configure time range data in tenure widgets. The following time ranges are provided by default: • >6 years • 2–6 years • 1–2 years • <1 year A scheduled job that runs weekly uses the date in the **Employment start date** field in the Employee Profile record to calculate the tenure data that appears in this widget.
Time spent in current positions	Widget reflects a distribution of team members by tenure in their current position. Administrators can configure the following components for the data that appears in this widget: • Up to six segments • The time range for each segment **Tip:** For more information about the configuration process, see Configure time range data in tenure widgets. The following time ranges are provided by default: • >6 years • 2–6 years • 1–2 years • <1 year A scheduled job that runs weekly uses the date in the **Start date** field in the Employee Job Profile record to calculate the tenure data that appears in this widget.
Range of employee experience	Widget reflects a distribution of team members by experience levels. The bar chart displays

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Team details page widgets (continued)

Widget	Description
	the number of employees in a specific team, at each experience level, including the team manager. The horizontal axis represents the experience level and the vertical axis represents the number of employees at each experience level. Leader Hub uses the Job level field in the Job profile record from the Employee Job Profiles [sn_employee_position] table to retrieve the data that appears in this widget.

Installing and configuring Leader Hub

Install the Leader Hub application to give organizational leaders and their supporters access to resources that help them guide, influence, and motivate teams within their organization. Administrators can configure components of the application to meet the specifications of your organization.

Installation and configuration overview

Install the Leader Hub application

Install the Leader Hub application to equip your organizational and HR leaders with the necessary tools to cultivate growth, develop talent, and make critical decisions that guide their organization toward long-term prosperity. The Leader Hub app gives leaders access to data about their organization's talent from the Employee Center.

Before you begin

The Leader Hub app has a dependency on UI share library[sn_ui_lib].

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure metrics for employee engagement

Use the Leader Hub Metric Configurations table to configure metrics for employee engagement with certain applications in the Talent Development suite. The configurable options are applicable to the metrics that appear in the Growth engagement widget and the employee cards on the Org talent page.

Before you begin

Role required: admin [sn_egd_lh.admin]

Procedure

1. Navigate to **All** > **Leader Hub** > **Leader Hub Metric Configuration**.
2. Select a record in the list to revise an existing configuration or select **New** to create a configuration.
3. Specify the name of the application for which you're creating metrics in the **Name** field.

   Tip: Refer to the options in the **Metric** field to determine the application for which you want to create metrics.

4. Make your employee engagement metric available to leaders by selecting the check box associated with the **Active** field.
5. Indicate the sequential order in which your employee engagement metric appears by entering a numeric value in the **Order** field.

   Tip: The employee engagement metric you configure for the application you specify in the **Metric** field appears in the Growth engagement widget in the following order: from lowest **Order** field value to highest.

6. Add an image for the employee engagement metric that you create by selecting the **Lookup using list** icon in the **Icon** field.
7. Select an application from the drop-down list associated with the **Metric** field that matches the application you specified in the **Name** field.
8. Select an option from the drop-down list associated with the **Metric Calculation Base** field to specify the base for the metric calculation.

Option	Description
Employees Count	Metrics for employee engagement are calculated based on the number of employees using the application you specify in the **Metric** field.
Managers Count	Metrics for employee engagement are calculated based on the number of managers using the application you specify in the **Metric** field.

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Option	Description
ICs Count	Metrics for employee engagement are calcu lated based on the number of individual con tributors using the application you specify in the **Metric** field.

9. Enter a description in the **Description** field to describe the metric you're configuring for the application you specified in the **Metric** field.

Application	Description
Aspirations	of <personnel> have active aspirations
Growth Plans	of <personnel> have active growth plans
Conversations	of <personnel> have had conversations
Learning	of <personnel> have completed courses
Mentoring	of <personnel> are involved in mentorships

   Tip: `<personnel>` represents the role that you specified in the **Metric Calculation Base** field (i.e., employee, manager, or individual contributor). The description you enter appears underneath the percentage that is calculated for the employee engagement metric you create. Using the description provided for the Aspirations app, the Growth engagement widget displays the following message: `<percentage>` of `<personnel>` have active aspirations.

10. Enter alternate text in the **Tooltip** field to provide further details about the employee engagement metric you're configuring.

    Tip: Use the tooltip to display text about the calculation for the metric you're configuring. For example, if you're configuring metrics for the Aspirations app, and metrics are calculated based on the number of employees with a minimum of one aspiration that is in progress, enter `Employees with at least one-in-progress aspiration` in the **Tooltip** field. This text appears when you hover your cursor over the icon appended at the end of the description.

11. Enter `now/leader-hub-analytics/<UIB page>` in the **Analytics URL** field.

    Tip: <UIB page> represents the name of the user interface builder (UIB) page. The name of the application for which you're configuring metrics is the UIB page name by default. For example, if you're configuring metrics for the Aspirations app and you're using the default UIB page, enter `now/leader-hub-analytics/aspirations`.

12. Select the check box associated with the **Enable on Talent Visibility** field to make your employee engagement metric visible on the Org talent page when you view a card that contains information about an employee.
13. Use the **Domain** field to specify the domain in which your metric configuration data is available.

Result

The employee engagement metric that you configured appears in the Growth engagement widget. The Growth engagement widget appears on the At a glance page.

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Configure time range data in tenure widgets

Use the Leader Hub Team Composition Configuration table to configure the time range data that appears in the following widgets: Range of years spent at the company and Time spent in current positions. These widgets appear on the Team details page.

Before you begin
Role required: admin [sn_egd_lh.admin]

About this task
Administrators can configure the following components for the data that appears in the previously mentioned widgets:

- Up to six segments for each widget
- The time range for each segment

Procedure

1. Navigate to the **All** menu, and enter `sn_egd_lh_team_composition_config.list` in the navigation filter.
   The Leader Hub Team Composition Configurations [sn_egd_lh_team_composition_config] table appears.
2. Select a record in the list to revise an existing configuration or select **New** to create a configuration.
3. Select an option from the drop-down list associated with the **Tenure type** field to specify whether the segment is applicable to tenure in the position or the company.

   Tip: The option you select in this field determines the widget in which the segment appears. Select **Company** to create a segment that appears in the Range of years spent at the company widget. Conversely, select **Position** to create a segment that appears in the Time spent in current positions widget.

4. Select a time unit from the drop-down list associated with the **Start unit** field to define whether the start of the time range is in months or years.
5. Select a time unit from the drop-down list associated with the **End unit** field to define whether the end of the time range is in months or years.
6. Enter the number of months or years at which the time range starts in the **Range start** field.
7. Enter the number of months or years at which the time range ends in the **Range end** field.
8. Indicate the sequential order in which your segment appears inside the widget by entering a numeric value in the **Display order** field.

   Tip: The segment you configure appears in the widget in the following order: from lowest **Display order** field value, to highest.

9. Make your time range segment visible to leaders by selecting the check box associated with the **Active** field.
10. Select **Submit**.

Result
The segment that you configured appears in one of the following widgets after the *`LH get team composition tenure counts`* scheduled job runs:

- Range of years spent at the company
- Time spent in current positions

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What to do next

1. Repeat the steps in this task to create additional segments in the previously mentioned widgets.
2. Verify that the *LH get team composition tenure counts* scheduled job runs weekly to update the data in the previously mentioned widgets. The calculated values that are generated by this scheduled job are also stored in the Leader Aggregate Values [sn_egd_lh_aggregate_values] table.

Assign a leader or supporter role to a user record

Provide organizational leaders and supporters with access to Leader Hub by assigning the required roles to their user record.

Before you begin

You must create an active employee definition to generate employee profiles. For more information about this process, refer to Create an active employee definition.

You must enable the new employee details and design. For more information, see Opt in to the employee profile.

You must provide employees of your organization with a license to enable access to Leader Hub. For more information about employee licensing, refer to License Talent Development Core users.

Define eligible users to show up in the org chart. For more information, see Organization chart in Employee Center Pro. Select **Employee Profile** in the **Table** field.

Role required: admin [sn_egd_lh.admin]

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
   The Users [sys_user] table appears.
2. Select a record in the list associated with an employee who is an organizational leader or supporter.
   The form for a user record appears.
3. On the **Roles** tab, select **Edit**.
4. Enter `sn_egd` in the **Collection** field.
   A list of roles beginning with "sn_egd" appears.
5. Double-click the role that corresponds to the employee's occupation in your organization.

Role	Occupation
sn_egd_lh.leader	Organizational leader
sn_egd_lh.supporter	Organizational supporter

   The role appears in the Roles List.
6. Select **Save**.

Result

Organizational leaders and supporters have the required role assigned to their user record to access Leader Hub. Use the navigation path that corresponds to the employee's role to view a list of employees with the leader or supporter role assigned to their user record:

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Choice table

Role	Path
Organizational leader	**All** > **Leader Hub** > **Leaders**
Organizational supporter	**All** > **Leader Hub** > **Supporters**

Create support relationships

Use the Org Support Relationships table to create a relationship between an organizational leader and an organizational supporter. After the relationship is established, supporters can use Leader Hub to view their designated leader's organization and provide support accordingly.

Before you begin

An organizational leader can receive support from multiple organizational supporters, and an organizational supporter can support multiple organizational leaders. You must create a separate record for each organizational relationship.

Role required: admin [sn_egd_lh.admin]

Procedure

1. Navigate to **All** > **Leader Hub** > **Org Support Relationships**.
   The Org Support Relationships table appears.
2. Select **New**.
3. Enter the name of an organizational leader in the **Leader** field.
4. Enter the name of an organizational supporter in the **Supporter** field.
5. Select **Submit**.

Result

The organizational supporter that you specified in the **Supporter** field can view the organization associated with the leader you specified in the **Leader** field when they access Leader Hub.

Quick start tests for Leader Hub

Validate that Leader Hub still works after you make any configuration change such as applying an upgrade or developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Danger: By default, the system property that is used to run automated tests is disabled to prevent you from accidentally running these tests on a production system. To avoid data corruption or an outage, run tests only on development, test, and other non-production instances. See Enable or disable executing Automated Test Framework tests.

All test suites and tests should pass on a default implementation. To validate a custom implementation, copy the automated tests and configure them for your customizations.

Quick start tests are disabled and read-only test templates. By default, they only produce a pass result when you run them with the default demo data that is provided with the application or feature plugin.

To make quick start tests produce a pass result when you run them with your instance-specific data, copy and configure them to use your instance data.

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

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The Agile Development 2.0 (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests (com.snc.sdlc.agile.2.0.atf) plugins must be enabled.

Note: When running, demo data is required.

Leader Hub

Leader Hub quick start tests require activating the Leader Hub plugin (sn_egd_lh) and loading demo data.

Leader Hub quick start tests

Test	Description	Release version

[Leader hub] - Validate LH flows	• Verifies that the following widgets are present on the At a glance page for user Maria Davies:
	  ○ Org talent
	  ○ Skill growth area
	  ○ Growth engagement
	• Verifies the employee card for the leader who has accessed Leader Hub appears at the top of the organizational chart on the Org talent page.
	• Verifies that selecting the **View team details** button on a card for an employee navigates the leader to the Team details page.
	• Verifies that the Skills widget is present on the Org Skills page.
	Note: Requires demo data.
		Xanadu

To learn more about Leader Hub, see Leader Hub.

Related topics

Quick start tests

Run quick start tests for Leader Hub

Run quick start tests to verify the Leader Hub app still works after each upgrade and deployment of new applications or integrations. If you customized Leader Hub, you must configure the quick start tests to ensure they're compatible with your customizations.

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **Automated Test Framework** > **Tests**.
2. Search and select the quick start tests you want to run.
   For information on available quick start tests, see Quick start tests for Leader Hub.
3. Click **Run Test**.
   The Test Steps tab provides each step of the quick start test.
   After the tests run, the Step Results tab shows the status of each test step. Screen shots also appear at the top of the form as attachments.

What to do next

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

Using Leader Hub

Use the Leader Hub app to access pertinent data about the talent in your organization so you can enhance employee engagement, adapt to changing circumstances, and make data-driven decisions that steer your organization toward success.

View north-star and drill-down metrics

View the north-star and drill-down metrics that appear in the Growth engagement widget. Use this data to gauge the level of employee engagement with the growth tools provided in the Talent Development suite of applications.

Before you begin

Role required: organizational leader [sn_egd_lh.leader]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Leader hub drop-down list, select **At a glance**.
3. In the Growth engagement widget, select a north-star metric associated with an application in the Talent Development suite that you want to view and analyze.

   Tip: The north-star metrics display a percentage that is calculated for employee engagement with certain applications in the Talent Development suite. The north-star metrics are the first row of metrics that appear in the Growth engagement widget.

   The drill-down metrics for the application you selected appears.
4. View the data in the drill-down metrics to obtain more information about employee engagement with the application you selected.

   Tip: The drill-down metrics are graphs that display further details about the corresponding north-star metric. The drill-down metrics appear underneath the north-star metrics.

View team details

Gain visibility into the skills and talent composition of each team in your organization. Use this data to determine the strengths and deficiencies of each team so you can drive changes that steer your employees toward success.

Before you begin

Role required: organizational leader [sn_egd_lh.leader]

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Leader Hub drop-down list, select **Org talent**.
   The Org talent page appears.
3. Use the organizational chart or the **Search for employees in your org** field to select an employee who leads a team in your organization.

   Tip: The card for each employee reflects whether they have individuals who report to them. You can determine whether an employee leads a team by viewing the number of directs and total reports they have in their employee card.

4. Select **View team details** on the card for the employee that you selected.
   The Team details page appears.
5. View the data on the Team details page to gauge your team's growth and development.

   Tip: The Team details page reflects the following information for the team that you selected:

   - Team skill score
   - Skills that require the most improvement
   - Employee engagement with the growth tools provided in the Talent Development

Use the View menu icon in Leader Hub

Use the View menu icon ( ) to view the career profile of an employee, schedule or create a conversation, or send emails.

Before you begin

Role required: organizational leader [sn_egd_lh.leader]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Leader hub drop-down list, select **Org talent**.
   The Org talent page appears.
3. Use the organizational chart or the **Search for employees in your org** field to select an employee in your organization.

   Tip: The card for each employee reflects whether they have individuals who report to them. You can determine whether an employee leads a team by viewing the number of direct and total reports they have in their employee card.

4. Select the View menu icon ( ) to perform one of the following steps.

Action	Description
View career profile	View a comprehensive career profile of an em ployee.
Create a conversation	Create a conversation with an employee. This option is only visible if the Microsoft Out look integration isn't enabled for Leader hub.

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Action	Description
	For more information, see Create a conversation form.
Schedule conversation	Schedule a conversation with an employee. This option is only visible if the Microsoft Outlook integration is enabled for Leader hub. For more information, see Schedule a conversation form.
Send email	Send an email to an employee. This action opens a link with the work email of your employee in the To field (default email client), and an empty subject line.

View skill details

View skills relevant to your organization and metrics that you can use to identify critical skill gaps. This data can be used to hold managers responsible for developing talent within their teams.

Before you begin

Role required: organizational leader [sn_egd_lh.leader]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Leader Hub drop-down list, select **Org skills**.
   The Org skills page appears.By default, skills are listed from lowest to highest skill score. Use the **Search** bar, and the **View** and **Sort by** filters to sort skills based on the criteria you choose from. Hover over the tool tip for a description of the column.
3. Select a skill that you want to review.
4. View the data on the Skill details page to obtain more information about the skill you selected.

   Tip: The Skill details page reflects the following information about the skill that you selected:

   - Skill description
   - Skill type
   - Trend in the company (rise or decline)
   - Roles that require the skill
   - Skill score
   - Skill compliance ratio
   - Skill relevancy to the organization
   - Average proficiency level
   - Teams with the lowest and highest skill score
   - Top experts (individuals with the highest proficiency level)

5. **Optional:** Select **Schedule conversation** to schedule a conversation with the team lead for teams that needs attention or have the highest score.

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Note: This option is only visible if the Microsoft Outlook integration is enabled for Leader hub. For more information, see Schedule a conversation form.

6. **Optional:** Select **Create a conversation** to create a conversation with the team lead for teams that needs attention or have the highest score.

Note: This option is only visible if the Microsoft Outlook integration is not enabled for Leader hub. For more information, see Create a conversation form.

View organizations you support

View your designated leader's organization so you can provide support in the capacity required for the organization to succeed. Supporters to whom the leader has delegated tasks and responsibilities can access Leader Hub to provide support accordingly.

Before you begin

Role required: organizational supporter [sn_egd_lh.supporter]

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the mega menu, select **Orgs you support**.
   The Orgs you support page appears.
3. In the Orgs you support widget, select the leader for whom you are providing support.
4. Select the **Org talent** tab.
5. Use the organizational chart or the **Search for employees in your org** field to select an employee who you must contact on behalf of your leader.
6. Select the **View menu** icon on the card for the employee that you selected.
7. Select **Send email** to send a message to the employee who you have been requested to contact.

Use the Employee Summary Virtual Agent topic in Leader Hub

Activate and use the Employee Summary Virtual Agent topic to access employee contribution summaries, view consolidated profiles, and track employee progress.

Before you begin

To access and use the Employee Summary reports topic, the following plugin must me activated:

- Now Assist for HR Service Delivery (HRSD) (sn_hr_gen_ai)

The following plugins are optional:

- Employee Connections (sn_ecn)
- Career Conversations (sn_egd_act)
- Learning (sn_lep)
- Learning Core (sn_lc)
- Manager Hub (sn_mh)
- Employee Goals (sn_egd_goals)

Role required: admin

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Procedure

1. Turn on the **Employee information summarization** skill.
   a. Navigate to **All** > **Now Assist Admin** > **Skills**.
   b. On the navigation panel, select **Employee**, then select **HRSD**.
   c. On the **Employee information summarization** card, select **Turn on**.
2. Publish the **Employee Summary** Virtual Agent topic.
   For more information, see Publish a Virtual Agent topic.
3. View the Employee Summary reports topic.
   For more information, see View employee summary reports.

Integrations for Leader Hub

Extend the Leader Hub application's capabilities by integrating with the Talent Development suite of applications to acquire pertinent data about the talent in your organization.

Leader Hub integrates with certain applications in the Talent Development suite to generate metrics for employee engagement. Organizational leaders use the data that Leader Hub generates to effectively drive performance, foster growth, and harness the potential of their teams. Leaders can view and analyze the data associated with their organization's talent from the Employee Center.

Leader Hub provides an integration with the following applications:

Talent Development Core

Talent Development Core (sn_egd_core) includes the Skills Foundation plugin (sn_skills_int), which must be enabled to use Leader Hub. Talent Development Core also provides the following modules, which are growth tools used in the metrics that Leader Hub generates for measuring employee engagement:

- Aspirations
- Growth plans

Skills Foundation

Leader Hub uses the skill data from Skills Foundation in the metrics that it produces for skill competency scores and critical skill gaps.

Career Conversations

When you optionally install the Career Conversations plugin (sn_egd_act), Leader Hub generates metrics for employee engagement with the Career Conversations app, such as the percentage of managers in your organization who had conversations with their employees in the past 30 days.

Mentoring

When you optionally install the Employee Connections plugin (sn_ecn), Leader Hub generates metrics for employee engagement with the Mentoring app, such as the percentage of employees in your organization currently engaged in mentorship.

Learning

When you optionally install the Learning plugin (sn_lep), Leader Hub generates metrics for employee engagement with the Learning app, such as the percentage of employees in your organization who have completed courses in the past 30 days.

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Leader Hub reference

Reference topics provide additional information about the lists and forms that you use to configure and administer Leader Hub.

Leader Hub Metric Configurations table

The form associated with a record in the Leader Hub Metric Configurations table enables you to configure metrics for employee engagement with certain applications in the Talent Development suite. The configurable options are applicable to the metrics that appear in the Growth engagement widget and the employee cards that appear on the Org talent page.

The form that appears when you create a record in the Leader Hub Metric Configurations table contains the following fields:

Leader Hub Metric Configuration form

Field	Description
Name	The name of the application for which you're creating metrics. This field value should match the value you select in the **Metric** field.
Analytics URL	The URL for the user interface builder (UIB) page that contains the graphs for the application you select in the **Metric** field.
Metric Calculation Base	The base for the metric calculation for the application you select in the **Metric** field. Options are as follows: • Select **Employee Count** to have metrics calculated based on the number of employees using the application you specify in the **Metric** field. • Select **Managers Count** to have metrics calculated based on the number of managers using the application you specify in the **Metric** field. • Select **ICs Count** to have metrics calculated based on the number of individual contributors using the application you specify in the **Metric** field.
Tooltip	Alternate text to provide further details about the employee engagement metric you're configuring.
Icon	Image for the employee engagement metric that you create. This image is associated with the application that you select in the **Metric** field.
Application	Field value is set to **Leader Hub** by default.
Domain	The domain in which your metric configuration data is available.

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Leader Hub Metric Configuration form (continued)

Field	Description
Description	A description to describe the metric you're configuring for the application you selected in the **Metric** field.
Active	Option to indicate whether the employee engagement metric is available to leaders when they access Leader Hub.
Enable on Talent Visibility	Option to indicate whether the employee engagement metric is visible on the Org talent page when you view a card that contains information about an employee. Administrators can select this option for up to three employee engagement metrics that they configure. The system generates the following error message when you exceed the maximum number of metrics permitted to have this option: `You can only choose up to three metrics to display on talent visibility card.`
Metric	An application in the Talent Development suite for which you want to configure metrics. Options are as follows: • **Aspirations** • **Conversations** • **Growth Plans** • **Learning** • **Mentoring**
Order	The sequential order in which your employee engagement metric appears in the Growth engagement widget.

Org Support Relationships table

The form associated with a record in the Org Support Relationships table enables you to create a relationship between an organizational leader and an organizational supporter. After the relationship is established, supporters can use Leader Hub to view their designated leader's organization and provide support accordingly.

The form that appears when you create a record in the Org Support Relationships table contains the following fields:

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Org Support Relationship form

Field	Description
Leader	Select an organizational leader from the list of users in your organization.
Supporter	Select an organizational supporter from the list of users in your organization.

Create a conversation form

Use the Create a conversation form to schedule a conversation with an employee when the Microsoft Outlook integration isn't enabled for Leader Hub.

Create a conversation form

Field	Description
Organizer	Name of the manager scheduling the conversation.
Have this conversation with	Name of the employee with whom you want to converse.
Conversation title	Name of the conversation. You can update this value.
Date	Date of the conversation. The format is <YYYY-MM-DD>. You can use the Show Calendar for Date icon to select a date.
Reoccurs	The frequency at which the conversation occurs.
Send invite	Select **Send invite** to schedule the conversation. The scheduled conversation appears in a new tab. You can update talking points, action items, or any other notes required for the conversation.
Cancel	Close this conversation.

Schedule a conversation form

Use the Schedule a conversation form to schedule a conversation with an employee when the Microsoft Outlook integration is enabled for Leader Hub.

Schedule a conversation form

Field	Description
Organizer	Name of the manager scheduling the conversation.
Have this conversation with	Name of the employee with whom you want to converse.
Conversation title	Name of the conversation.

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Schedule a conversation form (continued)

Field	Description
	You can update this value
Date	Date of the conversation. The format is <YYYY-MM-DD>. You can use the Show Calendar for Date icon to select a date.
Reoccurs	The frequency at which the conversation occurs.
Select an available date and time	Visual representation of your and your employee's calendar to schedule meetings based on available time slots.
Additional details	Give recipients more information about the scheduled conversation by including additional details.
Send invite	Select **Send invite** to schedule the conversation. The scheduled conversation appears in a new tab. You can update talking points, action items, or any other notes required for the conversation.
Cancel	Close this conversation.

Federal plugin

The ServiceNow, Inc. Federal plugin provides additional data elements for public sector customers that align with the Human Capital Information Model (HCIM). The HCIM is a set of data standards for Federal human capital management developed by the Human Resources Line of Business (HRLOB) at the Office of Personnel Management (OPM).

This plugin is intended for the use of extending the tables such as HR Profile, Location, Position with additional fields and tables relevant to the Federal, State, and Local public sectors.

Key benefits

The following are some key benefits of the Federal plugin:

- Promotes interoperability by providing data structures that makes data flow seamlessly to and from agencies, or shared service providers.
- Provides additional data elements that are commonly used in services agencies provide to the government employees they service.
- Augments the delivered HR Service Delivery and ServiceNow AI Platform tables.

  For example, the default Locations table (cmn_locations) can be configured to include reference fields from the Duty Station table (sn_fedtables_duty_station), or the Duty Location can be added as a field to the HR Profile to display the GeoLoc of the employee’s duty station.

- Offers prebuilt capability that allows for easier configuration of services and workflows and minimizes customization needs.

Important: The tables installed with the Federal plugin are standalone. There are no dependencies between the HR Service Delivery tables and the Federal plugin tables, until the Federal plugin tables are included in the work stream.

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Get started

Set up Federal plugin	Using Federal plugin	Federal plugin reference
		
Configure the plugin to get started	Use the plugin to promote interoperability between agencies or shared service providers.	Get details about tables in the plugin

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Set up Federal plugin

Set up the Federal plugin.

Activate Federal plugin

You can activate the Additional tables for Federal Agencies plugin [com.snc.fedtables] if you have the admin role.

Before you begin

Role required: admin

About this task

Tables are installed with the plugin. For more information, see Federal plugin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Additional tables for Federal Agencies plugin [com.snc.fedtables] using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

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Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

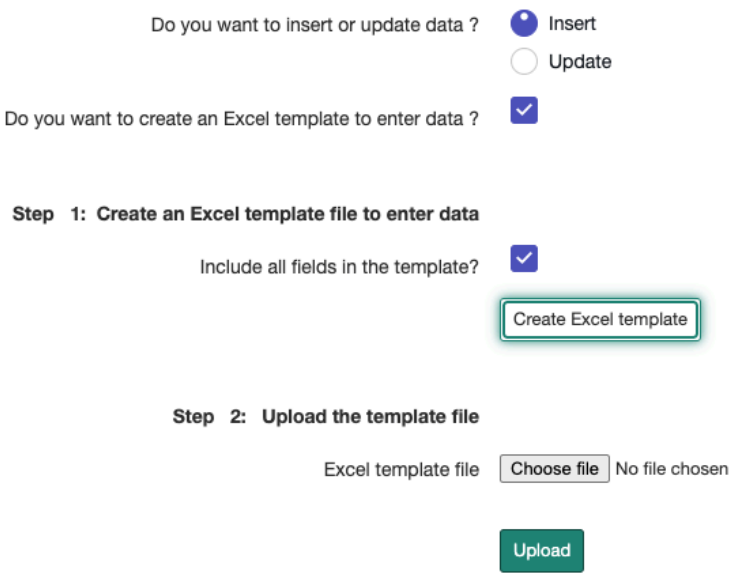
Import an excel template for Federal plugin

Some data elements included in the Federal plugin allow for an import of the reference data.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. In the **Name** column, filter the tables by **sn_fedtables**.
3. Select the Federal table in which you want to import the data.
4. Open **Show List** in **Related links**.
5. Right-click on the column heading for the data element you want to add reference data to.
6. Select **Import** from the menu.



7. Select **Insert** or **Update** as the import type.
8. Select **Choose file** to select the Microsoft Excel spreadsheet.
9. Select **Upload** to upload the Microsoft Excel spreadsheet.
10. In the Upload Progress page, select **Preview Imported Data** to verify the imported data.
11. If the template passes validation and the imported preview matches your expectations, select **Complete Import** to import data into the staging table.

Note: If the template fails validation, verify records in the template and repeat the process again.

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Using Federal plugin

With the Federal plugin, promote interoperability between agencies or shared services and augment the delivered HR Service Delivery and ServiceNow AI Platform tables.

Before you begin

Role required: admin

- Activate Federal plugin.
- Import an excel template for Federal plugin.
- Review this KB article.

Note: If you cannot access the KB article, search for Federal Data table plugin in ServiceNow Community.

Important: The Federal plugin:

- contains data elements that extend from the HR Profile table and therefore is only available with the HR Service Delivery solution. If you download the plugin without HR Service Delivery, you will notice empty tables and not have the ability to use the tables.
- is only available for customers on the Washington DC release and later.
- does not include business rules, client scripts or additional roles.

Procedure

Configure an HR service.

Federal plugin reference

Reference topics provide additional information about tables in Federal plugin.

Components installed with Federal plugin

Several types of components are installed with activation of the Federal (Additional tables for Federal Agencies) plugin, including tables.

Tables installed with Federal plugin

List of tables and details installed with Federal

Table	Business Name	HCBRM function
sn_fedtables_agency	Agency/ subelement	ALL
sn_fedtables_grade_level_class_rank_or_pay_band	Grade Level Class Rank Or Pay Band	ALL
sn_fedtables_legal_authority	Legal Authority	ALL
sn_fedtables_nature_of_action	Nature Of Action	ALL
sn_fedtables_pay_plan	Pay Plan	ALL
sn_fedtables_personnel_office_identifier	Personnel Office Identifier	ALL

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_record_action	Record Action	ALL
sn_fedtables_remarks	Remarks	ALL
sn_fedtables_citizenship_country_code	Citizenship Country Code	-
sn_fedtables_continued_service_agreement_required_indicator	Continued Service Agreement Required Indicator	-
sn_fedtables_reading_proficiency	Reading Proficiency	-
sn_fedtables_special_population_code	Special Population Code	-
sn_fedtables_writing_proficiency	Writing Proficiency	-
sn_fedtables_agency_personnel_action_data	Agency Personnel Action Data 1	All
sn_fedtables_agency_subelement_name	Agency Subelement Name	All
sn_fedtables_country_state_city_code	Region Code	All
sn_fedtables_country_state_city_code	City Code	All
sn_fedtables_country_state_city_code	State Code	All
sn_fedtables_country_state_city_code	County Code	All
sn_fedtables_fiscal_year_begin_end_dates	Fiscal Year Begin Date	All
sn_fedtables_fiscal_year_begin_end_dates	Fiscal Year End Date	All
sn_fedtables_fiscal_year_begin_end_dates	Fiscal Year Code	All
sn_fedtables_nature_action_legal_authority_desc	Nature of Action Legal Authority 1 Description	All
sn_fedtables_nature_action_legal_authority_desc	Nature of Action Legal Authority 2 Description	All
sn_fedtables_nature_action_legal_authority_desc	Nature of Action Agency Extension Code	All

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_nature_of_action_legal_authority_code2	Nature of Action Legal Authority 2 Code	All
sn_fedtables_organization_code	Agency Division	All
sn_fedtables_organization_code	Organization Name	All
sn_fedtables_organization_code	Organization Code	All
sn_fedtables_organization_code	Organization Code Line 1	All
sn_fedtables_organization_code	Organization Code Line 2	All
sn_fedtables_organization_code	Organization Code Line 3	All
sn_fedtables_organization_code	Organization Code Line 4	All
sn_fedtables_organization_code	Organization Code Line 5	All
sn_fedtables_organization_code	Organization Code Line 6	All
sn_fedtables_organization_code	Organization Code Line 7	All
sn_fedtables_organization_code	Organization Code Line 8	All
sn_fedtables_agency_personnel_action_data	Agency Personnel Action Data 1	
sn_fedtables_agency_personnel_action_data	Agency Personnel Action Data 2	All
sn_fedtables_agency_personnel_action_data	Agency Personnel Action Data 3	All
sn_fedtables_agency_personnel_action_data	Agency Personnel Action Data 4	All
sn_fedtables_agency_personnel_action_data	Agency Personnel Action Data 5	All
sn_fedtables_tenure	Tenure	A1-2 Workf Planning

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		A2-6 New H In-Process and Onboardin
sn_fedtables_computer_position	Computer Position	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_cybersecurity_category	Cybersecurity Category/ specialty Area	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_functional_classification	Functional Classification	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_occupation	Occupation	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_occupational_category	Occupational Category	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_position_sensitivity_and_risk	Position Sensitivity And Risk	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_supervisory_status	Supervisory Status	A1-3 Positio Classificati and Positio Manageme
sn_fedtables_position_occupied	Position Occupied	A1-3 Positio Classificati and Positio Manageme A2-6 New H In-Process and Onboardin A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_flsa_category	FLSA Category	A1-3 Positi Classificati and Positi Manageme A5-1 Compensa Manageme
sn_fedtables_language_identification	Language Identification	A2-3 Candidate Assessmer and Select
sn_fedtables_listening_proficiency	Listening Proficiency	A2-3 Candidate Assessmer and Select
sn_fedtables_speaking_proficiency	Speaking Proficiency	A2-3 Candidate Assessmer and Select
sn_fedtables_us_citizenship	US Citizenship	A2-3 Candidate Assessmer and Select
sn_fedtables_instructional_program	Instructional Program	A2-3 Candidate Assessmer and Select A2-6 New H In-Process and Onboardin
sn_fedtables_education_level	Education Level	A2-3 Candidate Assessmer and Select A2-6 New H In-Process and Onboardin A3-3 Learn Administra

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_veterans_preference	Veterans Preference	A2-3 Candidate Assessmer and Select A2-6 New H In-Process and Onboardin A6-2 Retirement Planning a Processing
sn_fedtables_security_clearance_level	Security Clearance Level	A2-4 Appli Screening, Reciprocity and Investigati Request A2-6 New H In-Process and Onboardin
sn_fedtables_current_appointment_authority	Current Appointment Authority	A2-6 New H In-Process and Onboardin
sn_fedtables_ethnicity_and_race_identification	Ethnicity And Race Identification	A2-6 New H In-Process and Onboardin
sn_fedtables_race_or_national_origin	Race Or National Origin	A2-6 New H In-Process and Onboardin
sn_fedtables_veterans_status	Veterans Status (Active Military Service)	A2-6 New H In-Process and Onboardin
sn_fedtables_service_obligation_type_code	Service Obligation Type Code	A2-6 New H In-Process and Onboardin

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		A3-3 Learn Administra
sn_fedtables_type_of_appointment	Type Of Appointment	A2-6 New H In-Process and Onboardin A3-3 Learn Administra
sn_fedtables_annuitant_indicator	Annuitant Indicator	A2-6 New H In-Process and Onboardin A5-1 Compensa Manageme A5-3 Bene Manageme A6-2 Retirement Planning a Processing
sn_fedtables_sex	Sex	A2-6 New H In-Process and Onboardin A5-3 Bene Manageme
sn_fedtables_disability	Disability	A2-6 New H In-Process and Onboardin A5-3 Bene Manageme A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_training_accreditation_indicator	Training Accreditation Indicator	A3-3 Learn Administra
sn_fedtables_training_credit_designation_type_code	Training Credit Designation Type Code	A3-3 Learn Administra
sn_fedtables_training_credit_type_code	Training Credit Type Code	A3-3 Learn Administra
sn_fedtables_training_delivery_type_code	Training Delivery Type Code	A3-3 Learn Administra
sn_fedtables_training_purpose_type_code	Training Purpose Type Code	A3-3 Learn Administra
sn_fedtables_training_source_type_code	Training Source Type Code	A3-3 Learn Administra
sn_fedtables_training_type_code	Training Type Code	A3-3 Learn Administra
sn_fedtables_training_type_sub_code	Training Type Sub Code	A3-3 Learn Administra
sn_fedtables_rating_of_record_pattern	Rating Of Record (Pattern)	A4-1 Emplo Performan Manageme A2-6 New H In-Process and Onboardin A6-2 Retirement Planning a Processing
sn_fedtables_rating_of_record_level	Rating Of Record (Level)	A4-1 Emplo Performan Manageme A4-3 Performan Appraisal System Certificatio for SES and SL/ST

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_special_pay_table_identifier	Special Pay Table Identifier	A5-1 Compensa Manageme
sn_fedtables_duty_station	Duty Station	A5-1 Compensa Manageme A1-3 Positi Classificati and Positi Manageme A2-6 New H In-Process and Onboardin A5-3 Bene Manageme
sn_fedtables_pay_rate_determinant	Pay Rate Determinant	A5-1 Compensa Manageme A2-6 New H In-Process and Onboardin
sn_fedtables_pay_basis	Pay Basis	A5-1 Compensa Manageme A2-6 New H In-Process and Onboardin A6-2 Retirement Planning a Processing
sn_fedtables_pay_status	Pay Status	A5-1 Compensa Manageme A2-6 New H In-Process

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		and Onboardin A6-2 Retirement Planning a Processing
sn_fedtables_work_schedule	Work Schedule	A5-2 Work Schedule and Leave Manageme A2-6 New H In-Process and Onboardin A6-1 Separation Counseling A6-2 Retirement Planning a Processing
sn_fedtables_alternate_work_schedule_code	Alternate Work Schedule Code	A5-2 Work Schedule and Leave Manageme A5-1 Compensa Manageme
sn_fedtables_benefits_continuation_fed_emp_group_life_insurance_fegli_flag	Benefits Continuation Federal Employees Group Life Insurance Fegli Indicator	A5-3 Bene Manageme
sn_fedtables_benefits_continuation_fed_emp_health_benefits_fehb_flag	Benefits Continuation Federal Employee Health Benefits Fehb Indicator	A5-3 Bene Manageme
sn_fedtables_benefits_continuation_retirement_indicator	Benefits Continuation	A5-3 Bene Manageme

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Retirement Indicator	
sn_fedtables_benefits_payment_type_code	Benefits Continuation Termination Insufficient Pay Payment Type Code	A5-3 Bene Manageme
sn_fedtables_designation_of_fegli_beneficiaries_indicator	Designation Of Fegli Beneficiaries Indicator	A5-3 Bene Manageme
sn_fedtables_federal_employees_group_life_insurance	Federal Employees Group Life Insurance	A5-3 Bene Manageme
sn_fedtables_federal_employees_group_life_insurance_fegli_life_change_code	Federal Employees Group Life Insurance Fegli Life Change Code	A5-3 Bene Manageme
sn_fedtables_federal_employees_health_benefits_plan	Federal Employees Health Benefits Plan	A5-3 Bene Manageme
sn_fedtables_court_orders_for_fegli_purposes_indicator	Court Orders For Fegli Purposes Indicator	A5-3 Bene Manageme A6-2 Retirement Planning a Processing
sn_fedtables_eligibility_to_participate_in_telework_indicator	Eligibility To Participate In Telework Indicator	A5-4 Work- Life Wellne Employee Assistance Programmi
sn_fedtables_retirement_plan	Retirement Plan	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_previous_coverage_indicator	Retirement Previous Coverage Indicator	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_fers_coverage	Fers Coverage	A6-2 Retirement Planning a Processing A2-6 New H In-Process and Onboardin A5-3 Bene Manageme
sn_fedtables_applicant_screening_reciprocity_investigation_request	Active Military Service Uniformed Service Code	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Employee Initial Appointment Period Start Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Employment Eligibility Additional Information Text	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Employment Suitability Federal Debt Delinquency Indicator	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Male Born after December 31, 1959 Indicator	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Military Discharge Type Code	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Military Service Branch Type Code	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Military Service End Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Military Service Start Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Most Recent Investigation Completed Type Code	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_applicant_screening_reciprocity_investigation_request	Most Recent Investigation Completion Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Other Name Type Code	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Other Name Used End Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Other Name Used Start Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Other Security Investigation Description Text	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Pending Investigation Agency Conducting Name	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Pending Investigation Initiated Date	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Pending Investigation Type Code	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Relatives Working for the Same Agency or Government Organization Indicator	A2-Talent Acquisition
sn_fedtables_applicant_screening_reciprocity_investigation_request	Selective Service Registration Indicator	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Assessment Competency Type Code	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Completed Indicator	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Eligibility End Date	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Eligibility Start Date	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_candidate_assessment_selection	Application Follow-up Required Indicator	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Is Expired Indicator	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Last Submitted Date Timestamp	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Last Updated Date Timestamp	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Original Submission Date Timestamp	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Process Veterans Preference Code	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Received Date Timestamp	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Record Status Code	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Record Status Description Text	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Application Status Text	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Assessment Competency Definition Text	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Assessment Competency Identifier	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Assessment Competency Is Rated Indicator	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Assessment Competency Name	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_candidate_assessment_selection	Assessment Competency Title Text	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Assessment Package Template Competency Identifier	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Citizenship Immigration Status Code	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Dual Citizenship Code	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Dual Citizenship Indicator	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Education Degree or Certificate Attained Date	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Education Level Earned Calendar Year	A2-Talent Acquisition
sn_fedtables_candidate_assessment_selection	Person Reviewed Application Name	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Alien Number Type Code	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Alien Registration Number (A-Number)	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Alien Registration Number Expiration Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Appointment NTE Days Limitation Number	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Career Tenure End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Career Tenure Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Creditable Military Service Days for Annual Leave Accrual Number	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_new_hire_inprocessing_onboarding	Creditable Military Service for Annual Leave End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Creditable Military Service for Annual Leave Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Creditable Non-Federal Service Days for Annual Leave Accrual Number	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Creditable Non-Federal Service for Annual Leave End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Creditable Non-Federal Service for Annual Leave Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employee Career Tenure Authority Code	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employee Initial Appointment Probation Period Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employee on Agency Rolls Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employee Training Service Obligation Expiration Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employee Training Service Obligation Explanation Text	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employment Eligibility Document Number	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Employment Eligibility	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Document Title Text	
sn_fedtables_new_hire_inprocessing_onboarding	Employment Eligibility Preparer or Translator Certification Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Identity Employment Document Expiration Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Identity Employment Document Issuing Authority Text	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Identity Employment Document Title Text	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Ineligible for Leave Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Managerial Appointment Probationary Period End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Managerial Appointment Probationary Period Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Managerial Position Probationary Period Exempt Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Managerial Position Probationary Period Not Completed Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Military Service Active Duty Start Date	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_new_hire_inprocessing_onboarding	Military Service Serial Number	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Service Year End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Service Year Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	SES Appointment Probationary Period End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	SES Appointment Probationary Period Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	SES Position Probationary Period Exempt Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	SES Position Probationary Period Not Completed Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	SSP Appointment NTE Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Supervisory Appointment Probationary Period End Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Supervisory Appointment Probationary Period Start Date	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Supervisory Position Probationary Period Exempt Indicator	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Supervisory Position Probationary Period Not Completed Indicator	A2-Talent Acquisition

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_new_hire_inprocessing_onboarding	Uniform Service Reserve Component Code	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Uniform Service Reserve Status Code	A2-Talent Acquisition
sn_fedtables_new_hire_inprocessing_onboarding	Voluntary Separation Incentive Payment (VSIP) Indicator	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Applicant Assigned Identifier	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Applicant Profile Identifier	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Application Control Number	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Application Number	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Time-to-Hire Number	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Current Accession Rate	A2-Talent Acquisition
sn_fedtables_talent_acquisition_management	Application Start Date Timestamp	A2-Talent Acquisition
sn_fedtables_personnel_action	Agency Use Code Description Text	A2-Talent Acquisition
sn_fedtables_personnel_action	Personnel Action Request Number	A2-Talent Acquisition
sn_fedtables_personnel_action	Personnel Action Request Text	A2-Talent Acquisition
sn_fedtables_td_planning	Detail NTE Date	A3-1 Talent Developme Planning
sn_fedtables_td_planning	Sabbatical NTE Date	A3-1 Talent Developme Planning
sn_fedtables_td_planning	Temporary Promotion NTE Date	A3-1 Talent Developme Planning

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_learning_administration	Training Course Title Text	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Start Date	A3-3 Learn Administra
sn_fedtables_learning_administration	Training End Date	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Credit Units Number	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Duty Hours Number	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Non-Duty Hours Number	A3-3 Learn Administra
sn_fedtables_learning_administration	Vendor Name	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Course Number	A3-3 Learn Administra
sn_fedtables_learning_administration	Skill Training Objective Text	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Tuition and Fees Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Books and Materials Cost Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Total Direct Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Travel Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Per Diem Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Total Indirect Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Non-Government Contribution Training Total Amount	A3-3 Learn Administra
sn_fedtables_learning_administration	Purchase Order/ Requisition Number	A3-3 Learn Administra
sn_fedtables_learning_administration	Vendor Website URL Text	A3-3 Learn Administra

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_learning_administration	Vendor Point-of-Contact (POC) Name	A3-3 Learn Administra
sn_fedtables_learning_administration	Student/ Membership Identifier	A3-3 Learn Administra
sn_fedtables_learning_administration	Agency Use Only (Training) Text	A3-3 Learn Administra
sn_fedtables_learning_administration	Training Billing Instructions Text	A3-3 Learn Administra
sn_fedtables_emp_performance_mgt	Performance Rating of Record Pattern Code	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Plan Indicator	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Element Type Code	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance General Measures Code	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Employee Refused to Sign Indicator	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Progress Review Indicator	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Cycle Begin Date	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Cycle End Date	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Plan Begin Date	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Plan End Date	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Element Label Text	A4-1 Emplo Performan Manageme

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_emp_performance_mgt	Performance Element Weights/ Priority Points Number	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Standard/Goal Text	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Standard Accomplishments Text	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Appraisal Completion Indicator	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Summary Rating of Record Code	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Recommended Rating of Record Code	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Supervisor Performance Review Date	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Employee Performance Review Date	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Derivation Total Score Number	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Improvement Plan (PIP)/ Opportunity Period Indicator	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Element Rating Level Number	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Reason Employee Refused to Sign Text	A4-1 Emplo Performan Manageme

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_emp_performance_mgt	Performance Progress Review Documentation Text	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Rating of Record Summary Documentation Text	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Element Strategic Plan Alignment Text	A4-1 Emplo Performan Manageme
sn_fedtables_emp_performance_mgt	Performance Appraisal Period Extended Indicator	A4-1 Emplo Performan Manageme
sn_fedtables_recognition_management	Award Distribution Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Suggestion/ Invention Benefit Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Action Taken Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Suggestion/ invention Non-Measurable Benefits Scale Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Time Off Award Leave Hours Number	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Pay Amount	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Employee Quality Step Increase Date	A4-2 Recognitio Manageme

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_recognition_management	SSP Award Distribution Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	SSP Award Code	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Justification Text	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Case Number	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Achievement Begin Date	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Achievement End Date	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Suggestion/ Invention Begin Date	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Suggestion/ Invention End Date	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Award Percent	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Tangible/ Intangible Award Indicator	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Suggestion/ Invention Current State Narrative Text	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Suggestion/ Invention Recommendation Narrative Text	A4-2 Recognitio Manageme
sn_fedtables_recognition_management	Tangible First Year Savings Amount	A4-2 Recognitio Manageme

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_recognition_management	Group Award - Recipients Total Number	A4-2 Recognitio Manageme
sn_fedtables_perf_appraisal_sys_cert_ses_sl_st	Performance Element Government-wide SL-ST Type Code	A4-3 Performan Appraisal System Certificatio for SES an SL/ST
sn_fedtables_perf_appraisal_sys_cert_ses_sl_st	Performance Higher Level Review Request Indicator	A4-3 Performan Appraisal System Certificatio for SES an SL/ST
sn_fedtables_perf_appraisal_sys_cert_ses_sl_st	Performance Higher Level Review Completed Indicator	A4-3 Performan Appraisal System Certificatio for SES an SL/ST
sn_fedtables_perf_appraisal_sys_cert_ses_sl_st	Performance Element Score Number	A4-3 Performan Appraisal System Certificatio for SES an SL/ST
sn_fedtables_perf_appraisal_sys_cert_ses_sl_st	Performance Standard/Goal Government-wide Text	A4-3 Performan Appraisal System Certificatio for SES an SL/ST
sn_fedtables_perf_appraisal_sys_cert_ses_sl_st	Performance Element Competencies Government-wide SL-ST Code	A4-3 Performan Appraisal System Certificatio for SES an SL/ST
sn_fedtables_separation_counseling	Indian Tribal Organization	A6-1 Separation Counselin

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Assignment Indicator	
sn_fedtables_separation_counseling	FEHB Benefits End Date	A6-1 Separation Counseling
sn_fedtables_separation_counseling	Employee Separated Indicator	A6-1 Separation Counseling
sn_fedtables_separation_counseling	FEHB Health Insurance Benefits Termination Indicator	A6-1 Separation Counseling
sn_fedtables_separation_counseling	FEHB Health Insurance Benefits Enrollee Death Date	A6-1 Separation Counseling
sn_fedtables_separation_counseling	FEHB Health Insurance Benefits Transfer in Indicator	A6-1 Separation Counseling
sn_fedtables_separation_counseling	DoD Buyout Payment Terms Text	A6-1 Separation Counseling
sn_fedtables_separation_counseling	OWCP Benefits Death Indicator	A6-1 Separation Counseling
sn_fedtables_separation_counseling	Supervisor Aware of Alternative Reasons for Resignation or Retirement Indicator	A6-1 Separation Counseling
sn_fedtables_separation_counseling	Reason for Resignation, Retirement, Failure to Relocate or to Accept Reassignment Text	A6-1 Separation Counseling
sn_fedtables_separation_counseling	Employee Separated Date	A6-1 Separation Counseling

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_separation_counseling	FEHB Insurance Benefits End Date	A6-1 Separation Counseling
sn_fedtables_separation_counseling	Separation Rate	A6-1 Separation Counseling
sn_fedtables_separation_counseling	Current Attrition Rate	A6-1 Separation Counseling
sn_fedtables_retirement_planning_processing	Retirement Plan Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Service Computation Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Continuation Health Care Insurance Benefits Coverage Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FERS Retirement Coverage Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Lost Days Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Disability Pay Stop Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement System Refunded Service End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement System Refunded Service Days Number	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Effective Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Election Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Election Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Employee Annuity Eligibility Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Employee Annuity Increase Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Interest Computation Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Interest Period Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Interest Rate	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Payment Amount	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Payment Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Payment Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Principal Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Total Due Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Special Population Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Contact Information Fax Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Work Schedule Time Reporting Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Record Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Date Deductions Began Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement FERCCA Code	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	FERS Coverage Election Effective Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Uncommon Tour of Duty Frozen Sick Leave Expiration Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Manual Submission Reason Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Claim Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Total Retirement Creditable Basic Pay Rate	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Creditable Adjusted Basic Pay Rate	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Additional Retirement Creditable Basic Pay Rate	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Additional Retirement Creditable Basic Pay Rate Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Firefighter Annualized Basic Pay Rate Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	USPS International Organization Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	USPS International Organization End Date	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	Military Service Active Duty End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	National Guard Military Service Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	National Guard Military Service Provision Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Total Earnings Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Payment Status Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Principal Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Interest Accrual Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit USERRA Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Total Paid Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Paid in Full Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Retirement Plan Code	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	Military Service Deposit Remaining Balance Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Last Payment Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Cumulative Military Service Deposit Total Paid Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Electronic Retirement Record Certified Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Direct Deposit Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Voluntary Early Retirement Authority Code Citation Text	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Statutory Provision Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Election Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Disability Retirement Application Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Disability Retirement Duty Status Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Reserve Technician Disability Indicator	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	Military Service Deposit Survivor Payment Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Designated Beneficiary Transmission Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Government Claim Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEGLI Option A Life Insurance Benefits Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Life Threatening Priority Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Retirement or Transfer to Fleet Reserve Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Retirement or Transfer to Fleet Reserve Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement System Paying Civilian Annuity Text	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retired Pay Received or Applied for Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Total Amount	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	FEGLI Basic Life Insurance Benefits Retirement Eligibility Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Retainer Pay Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Retainer Pay Waived Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service Begin Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service Work Schedule Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service Component Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service Credit Election Law Citation Text	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service Portability Election Law Citation Text	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEHB Health Insurance Benefits Retirement Eligibility Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEHB Health Insurance	A6-2 Retirement

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Benefits OPM Change Indicator	Planning a Processing
sn_fedtables_retirement_planning_processing	OPM Form 1510 Submission Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Agency Special Service Certification Letter Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Agency Annuity Estimate Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Deposit Counseling Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service Earnings Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service Earnings End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service Intermittent Start Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service Intermittent End Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Non-Deduction Service Deposit	A6-2 Retirement

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Payment Status Code	Planning a Processing
sn_fedtables_retirement_planning_processing	Military Membership Lost Medical Reason Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	CSRS Retirement Component Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	NAF Service Total Hours Worked Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Application Format Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	DD214 Submission Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEHB Health Insurance Benefits Previous Coverage Documentation Submission Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Dual Position Appointment Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement System Name	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Federal Income Tax Withholding Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Living Former Spouse Court Order Retirement Annuity Code	A6-2 Retirement Planning a Processing

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_retirement_planning_processing	Living Former Spouse Court Order Retirement OPM Verification Request Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FERS Retirement Coverage Election Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Cumulative Military Service Deposit Owed Amount	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Retirement Rank Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	CSRS Frozen Service Creditable Days Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEGLI Basic Life Insurance Benefits Retirement Deduction Level Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Service Application Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Application Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Credit Payment Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Period Pay Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Civil Service Retirement	A6-2 Retirement

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Coverage Indicator	Planning a Processing
sn_fedtables_retirement_planning_processing	FERS Effective Election Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEGLI Basic Life Insurance Benefits Retirement Election Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEGLI Option B Life Insurance Benefits Retirement Full Reduction Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEGLI Option C Life Insurance Benefits Retirement Election Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Mandatory Retirement NTE Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Special Retirement Service Computation Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Disability Retirement Notification Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Appointment Excluded from CSRS indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Appointment Excluded from FERS indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FICA Coverage 1 Indicator	A6-2 Retirement

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		Planning a Processing
sn_fedtables_retirement_planning_processing	FICA Coverage 2 Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Frozen Sick Leave Hours Balance Number	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FEGLI Option B Life Insurance Benefits Retirement Election Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Disability Retirement Application Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Marriage Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Marriage Performed by Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Annuity Election Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Divorce Date	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Survivor Annuity Percentage	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Annuity Election Percentage Total	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Application Submitted	A6-2 Retirement

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
	Previously Indicator	Planning a Processing
sn_fedtables_retirement_planning_processing	Military Service Post 1956 Deposit Paid Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Disability Pay Combat/War Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Other Birth Dates Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	CSRS Offset Eligibility Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Retirement Pay Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Certification of Service Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Federal Income Tax Withholding from Annuity Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Federal Income Tax Withholding Rate Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Federal Retirement Application Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Military Pay for Reserve Service Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Foreign Address Indicator	A6-2 Retirement

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		Planning a Processing
sn_fedtables_retirement_planning_processing	Employee/ Spouse Same Address Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	FERS/Uniformed Service Employee Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Eligibility Rate	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Retirement Eligibility Indicator	A6-2 Retirement Planning a Processing
sn_fedtables_retirement_planning_processing	Service Deposit/ Credit Type Code	A6-2 Retirement Planning a Processing
sn_fedtables_emp_acountability_conduct_performance	Performance Improvement Plan (PIP) Success Indicator	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Employee Within Grade Increase Denial Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Suspension NTE Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Notice of Performance Improvement Plan (PIP) Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Notice of Proposed Action Date	A7-1 Emplo Accountab for Conduc

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		and Performanc
sn_fedtables_emp_acountability_conduct_performance	Notice of Decision Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Notice of Right to Appeal Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Performance Improvement Plan (PIP) Start Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Performance Improvement Plan (PIP) End Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Performance Improvement Plan (PIP) Extension Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_emp_acountability_conduct_performance	Performance Improvement Plan (PIP) Completion Date	A7-1 Emplo Accountab for Conduc and Performanc
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Basis of Alleged Discrimination Code	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Hearing Requested Indicator	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Dismissed Indicator	A7-2 Administra Grievances

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Withdrawn Indicator	A7-2 Administra Grievances and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaints in Fiscal Year Number	A7-2 Administra Grievances and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Complainants in Fiscal Year Number	A7-2 Administra Grievances and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Case Number	A7-2 Administra Grievances and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Dismissal Date	A7-2 Administra Grievances and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Withdrawal Date	A7-2 Administra Grievances and Third-Party Proceeding
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Investigation Start Date	A7-2 Administra Grievances and Third-Party Proceeding

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Investigation End Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Final Action Start Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Final Action End Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Hearing Requested Investigation Start Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Hearing Requested Investigation End Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Hearing Requested Final Action Start Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Hearing Requested Final Action End Date	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint No Hearing Requested Investigation Start Date	A7-2 Administra Grievances and Third-

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint No Hearing Requested Investigation End Date	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint No Hearing Requested Final Action Start Date	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint No Hearing Requested Final Action End Date	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Finding by Issue Type Code	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Issue of Alleged Discrimination Code	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint No Hearing Requested Findings Number	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Hearing Requested Findings Number	A7-2 Administra Grievances and Third-Party Proceedings
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Finding by Basis Type Code	A7-2 Administra Grievances

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List of tables and details installed with Federal (continued)

Table	Business Name	HCBRM function
		and Third-Party Proceedin
sn_fedtables_admin_grievances_third_party_proceedings	EEO Complaint Status Code	A7-2 Administra Grievances and Third-Party Proceedin
sn_fedtables_labor_relations	Labor Organization Name	A8-1 Labor Manageme Relations Administra
sn_fedtables_labor_relations	Labor Organization Dues Cancellation Reason Code	A8-1 Labor Manageme Relations Administra
sn_fedtables_labor_relations	Labor Organization Dues Cancellation Effective Date	A8-1 Labor Manageme Relations Administra
sn_fedtables_labor_relations	Labor Organization Local/Branch/ Lodge Number or Name	A8-1 Labor Manageme Relations Administra
sn_fedtables_labor_relations	Position Bargaining Unit Status Code	A8-1 Labor Manageme Relations Administra
sn_fedtables_emp_recordkeeping	OPF Location Code	A9-5 Emplo Records Recordkee
sn_fedtables_emp_recordkeeping	OPF Sent to NPRC Date	A9-5 Emplo Records Recordkee
sn_fedtables_reference_data	Reference Data	Single tabl to house al Domain Va

Learning Core

The ServiceNow Learning Core application enables you to build a learning content repository by integrating with third-party Learning Management Systems, such as Cornerstone OnDemand,

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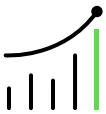
Udemy, PluralSight, Sumtotal and Saba learning systems. It allows you to configure learning catalogs that contain course items from both external learning systems and internal learning systems.

Learning Core provides the base set of tables, content, learning bases, roles, and access configuration that are used in the Learning Posts application and other coaching applications. Learning Core can be activated only as a dependent plugin.

Learning Core integrates with Cornerstone OnDemand, Pluralsight, Udemy, Sumtotal, and Saba learning systems. Activate only the learning system that you to plan use. For more information, see Integrate Learning Core with third-party learning management systems.

Get started

Explore  Learn about how Learning Core works.	Configure  Plan and configure your implementation.	Integrate  Integrating with third-party learning management systems.
Use  Create, curate, and manage learning content	Analytics and Reporting Solutions  Consolidate reports in each repository, course catalogs, and learning tasks.	Reference  More information on other components installed with Learning Core.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

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Exploring Learning Core

The ServiceNow® Learning Core application enables you to build a learning content repository by integrating with third-party Learning Management Systems, such as Cornerstone OnDemand, Udemy, PluralSight, Sumtotal and Saba learning systems. It allows you to configure learning catalogs that contain course items from both external learning systems and internal learning systems.

Learning Core provides the base set of tables, content, learning bases, roles, and access configuration that are used in the Learning Posts application and other coaching applications. Learning Core can be activated only as a dependent plugin.

By default, Learning Core integrates with Cornerstone OnDemand, Pluralsight, Udemy, Sumtotal, and Saba learning systems. Activate only the learning system that you to plan use. For more information, see Integrating Learning Core with third-party learning management systems.

Key features

Enablement of Predictive Intelligence Workbench displays recommended learning courses to users in Employee Center.

Learning Core Home page

Learning Core home page provides a consolidated view of the learning catalogs and learning management systems that have been configured in the Learning Core application.

Learning Catalogs

Click a tile to view the complete details of a specific catalog such as course items that it contains, managers to whom the catalog is viewable, users to whom the catalog is assigned.

Learning Sources

Click a source link to open the learning system source record in Enterprise Service Management Integrations Framework.

Catalogs

Catalog allows you to drive access control.

There are 2 levels of Access control:

- Catalog level
- Course level

Using the **Related Lists** for **Catalog**, you can define users who can read, cannot read, can contribute, cannot contribute to the course and catalog.

Collections

Collections are groupings of courses that are orchestrated within ServiceNow.

Configuring Learning Core

Set up and configure Learning Core with a learning management system to build a learning content repository.

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Administration tasks in Learning Core

Complete the administrative tasks in Learning Core with the Learning admin [learning_admin] role.

Before you begin

Role required: learning_admin

Procedure

1. Create source records for learning management systems that are integrating with Learning Core.
   For more information, see Create a source for a learning system.

   Important: Once you set up the Learning Core application, the source record for Cornerstone OnDemand, Pluralsight, Udemy, Sumtotal , and Saba applications are automatically created in the Source module in Enterprise Service Management Integrations Framework. These source records contain a predefined set of properties and integration services that help in pulling learning courses from Cornerstone On Demand, Pluralsight, Udemy, Sumtotal , and Saba applications into your ServiceNow instance.

2. Configure properties for various settings used in Learning Core.
   For more information, see Configure properties for Learning Core.
3. View the consolidated report on courses in each source, the number of catalogs associated with each of the source, and the status of learning tasks by source.
   For more information, see Reporting Solutions for Learning Core.

Create a source for a learning system

Create a source record for the third-party learning system that you want to integrate with your ServiceNow instance.

Before you begin

- Role required: learning_admin
- Learning Core integrates with Cornerstone OnDemand, Pluralsight, Udemy, Sumtotal , and Saba learning systems by default. Activate only the learning system that you to plan use.
  For more information, see Integrating Learning Core with third-party learning management systems.

Procedure

1. Navigate to **Integrations Framework** > **Source**.
2. Click **New**.
3. In the **Name** field, enter the name of the integration source, for example, Pluralsight.
4. Right-click the form header and click **Save**.
5. In the Integration Services related list, click **New**.
6. On the form, fill in the fields:

Integration service form

Field	Description
Name	Name of the integration service, for example, Pluralsight.

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Field	Description
Import set tables	List of intermediate tables which store records from the third-party system. **Note:** This field is enabled only when a scheduled pull service is selected in the **Service type** field.
Flow	Flow that interacts with the third-party system to pull the required data.
Active	Option to indicate that the integration service is available for use.
Application	Application which contains the integration service record.
Source	Name of the third-party system with which you want to integrate your application.
Order	Order in which you want to run transformation scripts.
Service type	Option to indicate the type of service **Scheduled pull** or **Ondemand Push**.
Retry policy	Configuration set to push a record when the previous push fails. **Note:** This field appears only when Ondemand Push service is selected in the **Service type** field.

7. Click **Update**.

Configure properties for Learning Core

Configure properties for various settings used in Learning Core.

Before you begin

Role required: learning_admin

Procedure

1. Navigate to **Learning** > **Administration** > **Properties**.
2. Configure the name of the portal that must open when the learning task is clicked in an email.
3. Navigate to **System Properties** and set the following property values:

Learning Core properties

Property	Description
com.glide.transform.json.max-partial-length	Transforms JSON objects to internal objects and sets the word limit for records fetched through an API call. ○ **Type:** integer ○ **Default value:** 16384 ○ **Recommended value:**1638400

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Property	Description
	Note: You must add this system property to set the desired value. When you synchronize third-party learning content with your ServiceNow instance, if the word count of the content being pulled into your instance exceeds the value set for this property, the synchronization will fail.
com.snc.process_flow.reporting.serialized.val_size_limit	Specify the number of bytes allowed for runtime values in each step in the flow execution details. To prevent truncation, set the value to an integer equal to or less than zero. ○ **Type:** integer ○ **Default value:** 16384 ○ **Recommended value:**1638400 **Note:** When you synchronize third-party learning content with your ServiceNow instance, if the word count of the content being pulled into your instance exceeds the value set for this property, the synchronization will fail.

Note: These properties set a word limit for records that are fetched through an API call. API call fails when the word limit goes beyond the **1638400** limit.

Configure a learning system

Configure the learning system so that the schedule flow pulls learning content from the third-party system into a ServiceNow instance.

Before you begin

Role required: learning_admin

Procedure

1. Navigate to **Learning** > **Administration** > **Learning System Configuration**.
2. Select the required learning source and set the **Active** field to true.

Learning System Configuration

Field	Description
Learning source	Record of the learning management system in Enterprise Service Management Integrations Framework.
Active	Option to indicate that the source is available for use.

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Field	Description
Learning system	External learning management system to which the record is associated.
Reassign completed course	Option to reassign the completed course.
Support assign course	Option to indicate whether a particular external system allows a course assignment API.
Sync course activity days	Option to specify the number of days that is considered for synchronizing course progress between the external learning management system and a ServiceNow application.
Logo	Option to include a logo of the source.

3. Click **Update**.

Integrating Learning Core with third-party learning management systems

Connect your ServiceNow instance with third-party learning systems to pull learning content into a single repository.

Before you begin

Role required: learning_admin

Activating the Learning Core (sn_lc) plugin automatically enables the following plugins:

- Enterprise Service Management Integrations Framework

The following plugins are not active by default, and you must install them to use them with Learning Core.

Procedure

1. Integrate your ServiceNow instance with the third-party learning source account that you plan to use.

To integrate with this third-party learning source	Do this
Pluralsight Skills account	Use an API key to authenticate the Service Now requests. Follow the steps in Set up the to perform the integration.
Cornerstone OnDemand application	Register an OAuth application in Cornerstone OnDemand application and authenticate re quests from ServiceNow instance. Follow the steps in to perform the integration.
Udemy application	Integrate your Udemy application with your ServiceNow instance. For more information, see

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To integrate with this third-party learning source	Do this
	Note: You must manually configure fields such as logos and course reas signments in the learning system config uration table.
Sumtotal application	Integrate your Sumtotal application with your ServiceNow instance. For more information, see
Saba application	Integrate your Saba application with your Ser viceNow instance. For more information, see
Workday Learning	Integrate your Workday Learning application with your ServiceNow instance. For more infor mation, see
SuccessFactors Learning	Integrate your SuccessFactors Learning ap plication with your ServiceNow instance. For more information, see Set up SuccessFactors

The records from the third-party content are pulled into your ServiceNow instance using an API call. To successfully run this API call, you must configure the *com.glide.transform.json.max-partial-length* and *com.snc.process_flow.reporting.serialized.val_size_limit* properties. For more information on these system properties, see Configure properties for Learning Core .

2. Activate the required schedule flow to synchronize third-party learning content into your ServiceNow instance.
   For more information, see Activate Learning Core flows.
3. Configure the learning system with which you want to integrate your ServiceNow instance.
   For more information, see Configure a learning system.

   Note: Once you set up the Learning Core application, the source record for Cornerstone OnDemand, Pluralsight, and Udemy applications are automatically created in the Source module in Enterprise Service Management Integrations Framework. These source records contain a predefined set of properties and integration services. For more information, see Sources for Learning Core.

4. Refresh the entire third-party content or synchronize new and updated service content into your ServiceNow instance.
   - To refresh the entire content, set the *full_pull* property to **true**.

     Note: When the schedule flow is run for the first time, it always is a full pull irrespective of the value set in the property.

   - To synchronize new and updated service content, set the *full_pull* property to **false**.

   a. Open any integration source for which you want to pull content.

   b. Click **Run Job** to manually synchronize data.
   The integration framework pulls the corresponding third-party learning courses into the Learning External Content [sn_lc_external_content] table on your ServiceNow instance.

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When synchronizing new and updated services, the content is populated as described in the table below.

Third-party content providers and corresponding services

Third-party content	New and Updated Services synchronized
Udemy	○ Courses ○ User activity
Cornerstone	○ Users ○ Courses ○ User activity ○ Course assign service
Pluralsight	○ Courses ○ Course progress such as percentage
Sumtotal	○ Users ○ Courses ○ User activity ○ Assign course in Sumtotal
Saba	○ Course assign service ○ Pull Courses from Saba ○ Sync Saba Users ○ Pull Saba User Course Activity
Workday Learning	○ Users ○ Courses ○ User activity ○ Assign course in Workday Learning
SuccessFactors Learning spoke	○ Retrieve learning information ○ User data ○ Course data ○ Sync user activity

What to do next

To integrate Learning Core with a new third-party learning system, follow the instructions in Create a source for a learning system.

Sources for Learning Core

Once you set up the Learning Core application, the source record for Cornerstone On Demand, Pluralsight, Udemy, Sumtotal, and Saba applications are automatically created in the Source module in Enterprise Service Management Integrations Framework. The source records in the

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Enterprise Service Management Integrations Framework application contain a predefined set of properties and integration services.

Integration source record: Cornerstone Ondemand

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Cornerstone.
Properties	Set of properties that are predefined for the Cornerstone OnDemand application. • **page_size**: Number of records that are pulled through an API call from the Cornerstone OnDemand application. • **full_pull**: When set to **True**, all the active users and learning courses from the Cornerstone OnDemand system are pulled into the ServiceNow application. When set to **False**, modified users, modified transcripts, and updated courses are pulled from the Cornerstone OnDemand system into the ServiceNow instance. • **url_prefix**: Deep link prefix to pull learning objects from Cornerstone OnDemand system during run time. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.
Integration Services	Services that interact with the Cornerstone OnDemand application to pull or push learning courses. • **Course assign service**: Assigns a course to an employee in the Cornerstone Ondemand application. • **Sync users**: Maps users in the Cornerstone OnDemand system to users in the ServiceNow system using email Ids. **Note:** If you want to use user_id or user_name field for mapping users, then override**getCornerstoneUser method** in the sn_lc.UserMappingUtil script. • **Courses**: Pulls learning courses from the Cornerstone OnDemand application into the ServiceNow application. • **User activity**: Pulls details of user activity on learning courses from the Cornerstone OnDemand application into the ServiceNow application.

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Integration source record: Pluralsight

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Pluralsight.
Properties	Set of properties that are predefined for the Pluralsight system. • **page_size**: Number of records that are pulled through an API call from Pluralsight. • **full_pull**: When set to **True**, all the learning courses are pulled from Pluralsight into the ServiceNow instance. When set to **False**, updated learning courses progress is pulled from Pluralsight into the ServiceNow instance. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.
Integration Services	Services that interact with the Plural sight application to pull learning courses into the ServiceNow application. • **Courses**: Pulls learning courses from the Pluralsight application into the ServiceNow application. • **Course progress**: Pulls the progress of learning courses from the Pluralsight application into the ServiceNow application.

Integration source record: Udemy

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Udemy
Properties	Set of properties that are predefined for the Udemy application. • **page_size**: Number of records that are pulled through an API call from Udemy into the ServiceNow application. • **full_pull**: When set to **True**, all the learning courses are pulled from Udemy into the ServiceNow application. When set to **False**, updated learning courses and learning courses progress are pulled from Udemy into the ServiceNow application. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.

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Integration source record: Udemy (continued)

Field	Description
Integration Services	Services that interact with the Udemy application to pull learning courses into the ServiceNow application. • Pull Courses: Pulls learning courses from the Udemy application into the ServiceNow application. • Pull user activity: Pulls details of user activity on learning courses from the Udemy application into the ServiceNow application.

Integration source record Sumtotal

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Sumtotal
Properties	Set of properties that are predefined for the Sumtotal application. • **full_pull**: When set to **True**, all the learning courses are pulled from Sumtotal into the ServiceNow application. When set to **False**, updated learning courses and learning courses progress are pulled from Sumtotal into the ServiceNow application. • **url_prefix**: Deep link prefix to pull learning objects from Sumtotal during run time.
Integration Services	Services interact with the Sumtotal application to pull or push learning courses. • **Assign course in Sumtotal**: Assigns a course to an employee in the Sumtotal application. • **Pull Courses**: Pulls learning courses from the Sumtotal application into the ServiceNow application. • **Sync users**: Maps users in the Sumtotal system to users in the ServiceNow system using user IDs. • **User activity**: Pulls details of user activity on learning courses from the Sumtotal application into the ServiceNow application.

Integration source record: Saba

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Saba
Properties	Set of properties that are predefined for the Saba application.

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Integration source record: Saba (continued)

Field	Description
	• **full_pull**: When set to **True**, all the learning courses are pulled from Saba into the ServiceNow application. When set to **False**, updated users, learning courses, and learning course progress are pulled from the Saba system into the ServiceNow application. • page_size: Number of records that are pulled per page.
Integration Services	Services that interact with the Saba application to pull or push learning courses. • **Course assign service**: Assigns a course to an employee in the Saba application. • **Pull Courses from Saba**: Pulls learning courses from the Saba application into the ServiceNow application. • **Sync Saba Users**: Maps users in the Saba system to users in the ServiceNow application based on email IDs. • **Pull Saba User Course Activity**: Pulls details of user activity on learning courses from the Saba application into the ServiceNow application.

Activate Learning Core flows

Activate the flows that run on a schedule basis to pull learning course items from the Cornerstone OnDemand, Udemy, Pluralsight, Sumtotal , and Saba applications into the ServiceNow application.

Before you begin

Role required: admin

Procedure

1. Navigate to **Process Automation** > **Flow Designer** > **Designer**.
2. In the **Flows** section, activate the flows that you need.
   To change the frequency and time at which you want to run the flow, click **Trigger**.

Flows for Learning Core

Flow	Description
Trigger Cornerstone Learning Sync	By default, runs on a scheduled basis to pull course items from Cornerstone Ondemand into a ServiceNow application. **Important:** The flow does not run if you do not activate the Cornerstone Ondemand record in Learning System Configuration.
Trigger Pluralsight Learning Sync	By default, runs on a scheduled basis to pull course items from Pluralsight into a ServiceNow application. **Important:** The flow does not run if you do not activate the Pluralsight record in Learning System Configuration.

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Flow	Description
Trigger Udemy Learning Sync	By default, runs on a scheduled basis to pull course items from Udemy into a ServiceNow application. **Important:** The flow does not run if you do not activate the Udemy record in Learning System Configuration.
Trigger Sumtotal Learning Sync	By default, runs on a scheduled basis to pull course items from Sumtotal into a ServiceNow application. **Important:** The flow does not run if you do not activate the Sumtotal record in Learning System Configuration.
Trigger Saba Learning Sync	By default, runs on a scheduled basis to pull course items from the Saba system into a ServiceNow application. **Important:** The flow does not run if you do not activate the Saba record in Learning System Configuration.

Managing course and catalog content

Create, curate, and manage learning content in Learning Core.

Create a course catalog

Create a course catalog to maintain courses under one category and drive access control.

Before you begin

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Procedure

1. Navigate to **Learning** > **Administration** > **Course Catalog**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Course catalog form.
4. Click **Submit**.

Related topics

Create courses to add to a course catalog

Define user access to course catalog

Create courses to add to a course catalog

After creating a course catalog, create new course items to add to the course catalog and categorize them accordingly.

Before you begin

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Create a course catalog, for more information see, Create a course catalog.

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Procedure

1. Navigate to **Learning** > **Administration** > **Course Catalog**.
2. Open the course catalog that you want to add courses to.
3. On the **Learning Course Items** tab, click **New**.
4. Select the type of course item that you want to create:
   - To create internal learning content, see Create internal learning content.
   - To create a content collection, see Create a content collection.
5. Click **Submit**.

Define user access to course catalog

After creating a course catalog, define user access criteria at the course catalog level.

Before you begin

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Create a course catalog. For more information, see Create a course catalog.

Procedure

1. Navigate to **Learning** > **Administration** > **Course Catalog**.
2. Open the course catalog that you want to define user access for.
3. On the Can Read tab, click **Edit**.
4. Add users who should have access to the course catalog.
5. On the Cannot Read tab, click **Edit**.
6. Add users who should not have access to the course catalog.

   Note: If a user is present in both Can Read and Cannot Read related lists, the Cannot Read takes precedence and the user is restricted from read access to that course catalog.

7. On the Can Contribute tab, click **Edit**.
8. Add users who can contribute to the course catalog.
9. On the Cannot Contribute tab, click **Edit**.
10. Add users who cannot contribute to the course catalog.

Create a content collection

Create a content collection in Learning Core to dynamically group learning content that includes multiple internal and external courses.

Before you begin

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Every collection has to be a part of a course catalog. Create a course catalog before you can create a collection. For more information, see Create a course catalog.

Procedure

1. Navigate to **Learning** > **Content** > **Collections**.
2. Click **New**.

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3. On the form, fill in the fields.
   For a description of the field values, see Collection form.
4. Click **Submit**.

Related topics

Collection form

Add course items to collection

Add learning course sections

Add course items to collection

After you create a collection, add course items as groupings of courses that are orchestrated within ServiceNow®.

Before you begin

Role required: sn_lc.learning_admin, sn_lc.learning_course_catalog_admin

Create a content collection. For more information, see Create a content collection.

Procedure

1. Navigate to **Learning** > **Content** > **Collection**.
2. Select the collection that you want to add course items to.
3. On the Course Collection Items tab, click **Add**.
4. On the form, fill in the fields:

Collection course item

Field	Description
Collection	Associated course collection.
Course	Course item to be added to the selected collection.
Order	Order that defines the start of a new section. All learning courses that have order greater than this defined order will be displayed under this section.
Mandatory	If it is mandatory for the course item to be added to the collection.

Define user access to course within a collection

Define user access to the collection to define who has read access to the collections.

Before you begin

Role required: admin

Create a collection. For more information, see Create a content collection.

Procedure

1. Navigate to **Learning** > **Content** > **Collection**.
2. Open the collection that you want to define user access for.
3. On the Can Read tab, click **Edit**.

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4. Add users who should have access to the course catalog.
5. On the Cannot Read tab, click **Edit**.
6. Add users who should not have access to the course catalog.

> **Note:** If a user is present in both Can Read and Cannot Read related lists, the Cannot Read takes precedence and the user is restricted from read access to that course catalog.

Add learning course sections

Add learning course sections to collections.

Before you begin

Role required: sn_lc.learning_admin

Create a collection. For more information, see Create a content collection.

Procedure

1. Navigate to **Learning** > **Content** > **Collection**.
2. Open the collection that you want to add learning course sections to.
3. On the Learning Course Sections tab, click **New**.
4. On the form, fill in the fields:

Learning course sections

Field	Description
Title	Name of the learning course section.
Course item	Associated course item.
Order	Order of the learning course item within the collection.
Short description	Description of the learning course item.

5. Click **Submit**.

Create internal learning content

Create internal learning courses so that employees can learn new content and enhance their skills set.

Before you begin

Role required: sn_lc.catalog_manager

Procedure

1. Navigate to **Learning** > **Content** > **Learning Content**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Learning internal content form.
4. Click **Submit**.

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What to do next
Associate skills to learning content.

Related topics
Learning internal content form

View external learning content

View details of all the courses items that are pulled from external sources into the ServiceNow application.

Before you begin
Role required: sb_lc.learning_admin

Procedure
1. Navigate to **Learning** > **Content** > **External Content**.
2. On the form, view the fields:
   For a description of the field values, see Learning External Contents form

Create a learning library

Create a learning library that includes learning content from internal and external content repositories.

Before you begin
Role required: sn_lc.catalog_manager, sn_lc.catalog_group_manager

Procedure
1. Navigate to **Learning** > **Content** > **Learning Libraries**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Learning library form.
4. Click **Submit**.

Related topics
Learning library form

Add course items to learning library

Add users to learning library

Add course items to learning library

To add course items to the catalog.

Before you begin
Role required: admin

Create a learning library. For more information, see Create a learning library

Procedure
1. Navigate to **Learning** > **Content** > **Learning Library**.
2. Select the learning library that you want to add course items to.

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3. On the Content tab, click **Add**.
4. On the Select content window, select courses and click **Add selected**.

Add users to learning library

You can add applicable users to a learning library.

Before you begin

Role required: admin

Create a learning library. For more information, see Create a learning library

Procedure

1. Navigate to **Learning** > **Content** > **Learning Library**.
2. Select the learning library that you want to add course items to.
3. On the Applicable Users tab, click **Edit**.
4. On the Edit Members window, select courses and click **Save**.

Create a learning task

Assign a learning task to an employee that can be completed from the To-dos page in Employee Center.

Before you begin

Role required: sn_lc.task_creator

Procedure

1. Navigate to **Learning** > **Tasks** > **Learning Tasks**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Learning task form.
4. Click **Submit**.

Related topics

Learning task form

Reporting Solutions for Learning Core

Learning Experience Dashboard provides a consolidated report on courses in each repository, catalogs with courses, and learning tasks status.

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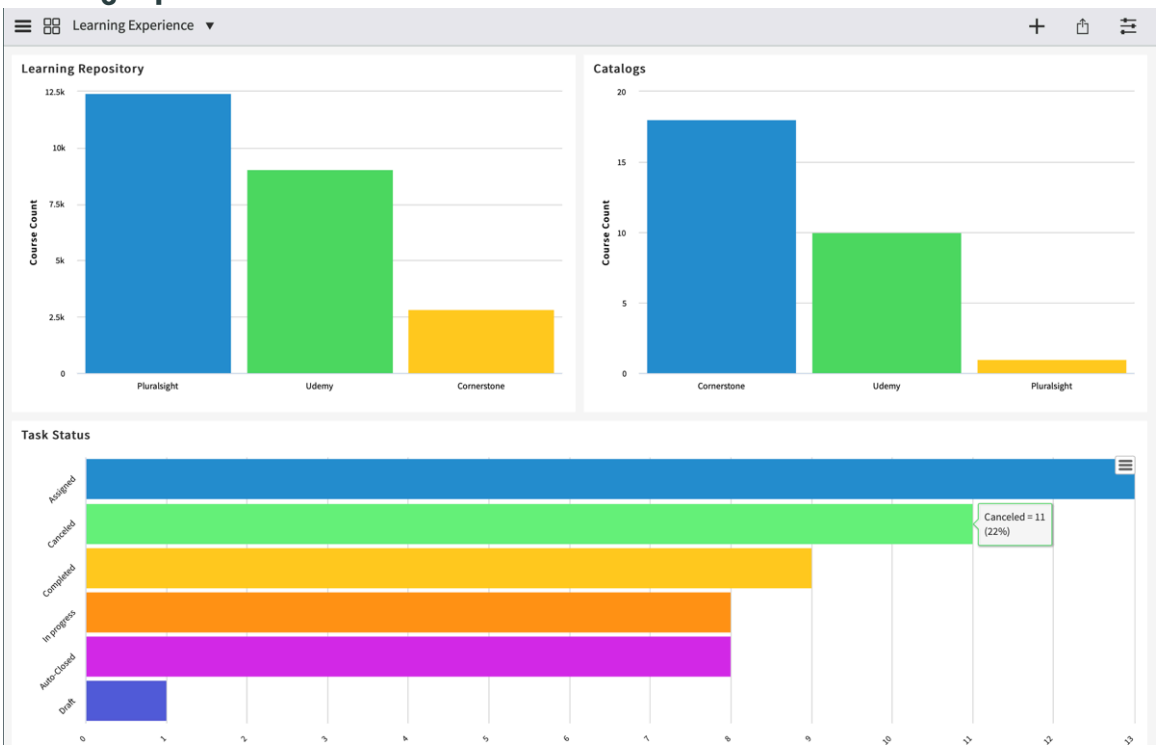
Learning Experience Dashboard



Learning Repository widget

Displays the number of courses associated with each of the source. Source indicates the third-party learning management system that has integrated with the ServiceNow application.

Catalogs

Displays the number of catalogs associated with each of the source. Indicates how many number of courses from a particular source (third-party learning management system) are added to catalogs.

Task Status

Displays the status of all the learning tasks within each source.

Learning Core Reference

Reference topics provide additional information about Learning Core.

Components installed with Learning Core

Several types of components are installed with activation of the Learning Core [sn_lc] plugin, including user roles, and tables.

Roles

Role title [name]	Description	Contains roles
Learning admin [sn_lc.learning_admin]	Grants administrative rights to create, read, update, and delete (CRUD) catalog, learning content, learning course	• sn_lc.catalog_manager • sn_hr.integr_fw.admin

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Roles (continued)

Role title [name]	Description	Contains roles
	catalogs, roles, and configure learning source.	
Learning course catalog admin [sn_lc.learning_course_catalog_admin]	Posesses admin rights to manage learning course catalogs.	[sn_lc.learning_course_catalog_admin]
Learning content writer [sn_lc.content_writer]	Grants read or write access for learning courses.	sn_lc.content_creator
Learning task creator [sn_lc.task_creator]	Grants read or write access for learning tasks.	[sn_lc.task_creator]
Learning catalog manager [sn_lc.catalog_manager]	Grants administrative rights to create, read, or update learning libraries.	• sn_lc.task_creator • sn_lc.content_writer
Learning catalog group manager [sn_lc.catalog_group_manager]	Grants administrative rights to create, read, or update learning libraries based on groups.	• sn_lc.task_creator • sn_lc.content_writer

Tables

Table	Description
Learning External Content [sn_lc_external_content]	Stores details of external course items that are pulled from third-party systems.
Learning User Course Activity [sn_lc_user_course_activity]	Stores details of learning course activities such as user to whom the course is assigned, status, due date, and name of the learning course.
Collection [sn_lc_collection]	Stores details of the collections of internal and external learning content.
Learning Course Catalog [sn_lc_course_catalog]	Stores details of the course catalogs that maintain courses under one category and drive access control
Learning Content [sn_lc_content]	Stores details of internal learning content such as knowledge articles and videos that are created in the ServiceNow application.
Learning Course Item [sn_lc_course_item]	Stores details of learning course items, such as the source to which the learning course belongs.
Learning Task [sn_lc_learning_task]	Stores details of learning tasks, such as a user to whom the learning task assigned, and due date by when the learning task must be completed.
Learning System Configuration [sn_lc_learning_system_configuration]	Stores configuration parameters of sources, third-party learning management systems.

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Course catalog form

Use the course catalog form to create a new learning course catalog.

Course catalog form

Field	Description
Title	Name of the catalog.
Active	Option to indicate that the catalog is available for use.
Owner	The owner of the course catalog.
Description	Description of the catalog.
Publish flow	Flow for publishing the course. Use **Insta publish flow** for immediate publishing of course catalogs.
Retire flow	Flow for publishing the course. Use **Insta retire flow** for immediate retirement of course catalogs.
Management	
Admins	Suitable administrator role for the course catalog.
Content properties	
Extension duration (days)	Number of days until which any course within the catalog can be extended.
Pending retirement duration (days)	Number of days remaining for the course to retire.

Learning library form

Use the learning library form to create a learning library.

Learning Library form

Field	Description
Title	Name of the catalog.
Active	Option to indicate that the catalog is available for use.
Applicable to groups	Option to enable the assignment of course to groups. **Note:** This field is applicable only to WFO/Coaching application.
Description	Description of the catalog.
Restrict Type	Employees that the catalog is available to.
Manager Access Restrict To	Employees that the catalog is visible to or employees who can curate the items in the catalog. **Note:** This field appears only when **User criteria** is selected in the **Restrict Type** field.

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Learning task form

Assign a learning task to an employee that can be completed from the To-dos page in Employee Center.

Learning task form

Field	Description
Number	Unique identifier of the learning task.
Assigned to	User to whom you want to assign the learning task.
Learning Library	Name of the learning library that is assigned via the learning task.
Course Item	Name of the course item that is assigned via the learning task.
Optional	Option to make the learning task non-mandatory.
State	Current state of the task.
Due date	Date by which the assignee must complete the learning task.
Opened by	Name of the user who has created the learning task.
Short description	Additional details of the learning task.

Life-cycle stages of a content collection in Learning Core

The State transition of a collection guides you through the stages of its life cycle.

Collection life-cycle stages

Life-cycle stage status	Description
Draft	Default value for a new collection.
In Review	Collection that is pending review.
Scheduled for Publish	Collection that is scheduled for publish.
Published	Collection that is published.
Pending Retirement	Collection that is pending for retirement.
Retired	Collection that is retired.

Learning internal content form

Use the Learning internal content form to create internal Learning courses so that employees can learn new content and enhance their skills set.

Learning Internal Content form

Field	Description
Internal source	Type of Learning content that is created. • **Knowledge article** • **URL** • **Free form** • **Quiz**

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Learning Internal Content form (continued)

Field	Description
Knowledge Article	Knowledge article to be included in theLearning content. This field is available only when **Knowledge article** is selected from the **Internal source** field.
URL Domain	Link to be included in internal Learning content. • **Youtube** • **Vimeo** • **Other** This field is available only when **URL** is selected from the **Internal source** field.
URL	URL for the selected domain. This field is available only when **URL** is selected from the **Internal source** field.
Title	Title of the Learning content.
Course catalog	Course catalog associated with the internalLearning course.
Level	Level of complexity of the Learning content.
State	Current state of the internal Learning course.
Author	Name of the user who created the Learning content.
Days to expire	Number of days before the content expires.
Active	Option to indicate that content is available for use.
Estimated duration	Total duration of the course content in days and hours. For example, for a video, it's the duration of the video. For a Knowledge article, the duration is estimated based on the length of the article.
Image	Image associated with the internal Learning course.
Details	
Short description	Brief description of the internal content.
Description	Full description of the internal content.
Objective	End goal of the internal content being created.
Audience	
Non discoverable	Determines if the course is discoverable by the audience. If a course is non-discoverable, it can’t be assigned and doesn't appear in the search results on the portal.
Metrics	

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Learning Internal Content form (continued)

Field	Description
Average rating	Rating given to the content.
Release Lifecycle	
Published	Published date of the internal content.
Planned publish date	Date when the internal content is due for publishing.
Valid until	Date until when the internal content is valid.

Learning External Contents form

Description of the field values in the Learning External Content form.

Learning External Contents form

Field	Description
Title	Title of the content that is pulled from third-party learning system.
Description	Description of the course item that is pulled from external learning system.
URL	URL to open the course item in external system.
Type	Type of service (OnDemand Push or Scheduled Pull) that interacts with external learning system.
Updated	Date and time when the course item was last updated.
External source	Name of the external learning system from which the course item is pulled.
Correlation ID	Unique identifier for the course item that is generated from external system.
Active	Option that indicates that the course item is active and available to use.
Mobile deeplink	Deeplink that is generated from external system. Deeplink allows you to navigate to a course from a native application.
Estimated duration	Total time that is taken to complete the course item.

Collection form

Use the Collection form to create a content collection in Learning Core to dynamically group learning content that includes multiple internal and external courses.

Collection form

Field	Description
Title	Name of the collection.
Course catalog	Course catalog associated with the collection.
Level	The difficulty level of content in the collection.

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Collection form (continued)

Field	Description
	• **Beginner** • **Intermediate** • **Advanced**
Course type	The type of content in the collection. • **Collection** • **Path**
State	Current state of the collection.
Active	Option to enable the collection. When the checkbox is selected, the collection can be accessed by users.
Image	Image associated with the collection.
Estimated duration	Estimated duration of collection in days, hours, minutes, and seconds.
Details	
Short description	Brief description about the collection.
Description	Detailed description about the collection
Approval	Approval status of the collection.
Audience	
Non discoverable	Visibility of the collection. When the checkbox is selected, the collection will not appear in search results on the Learning portal. Every collection is discoverable by default.
Metrics	
Average rating	Average rating of content in the collection.
Release Lifecycle	
Published	Published date of the collection.
Planned publish date	Scheduled publish date of the collection.
Valid until	Retirement date of the collection.

Workforce Optimization for HR Overview

Workforce Optimization for HR simplifies the daily routine of HR Agent Managers to develop high-performing teams by optimizing schedules and work assignments, respond to ad hoc changes in real time, manage time-off requests and providing the skills they need to succeed—all in one workspace.

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Workforce Optimization for HR

Manage and maintain the productivity of your workforce from a single application using Workforce Optimization for HR. With this application, you can efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

The application is available on configurable workspaces. Administrators can configure and customize the workspace using the application capabilities to complete the service objectives efficiently.

Workforce Optimization for HR WFO enables you to do these tasks:

- Gain real-time visibility into work items, escalations, and KPIs by each channel so you can manage for optimal performance.
- Manage normal work shifts and on-call shifts from one, centralized experience. Track shift coverage, swaps, and time off requests.
- Forecast agent demand with precision modeling demand scenarios to analyze impact to agent schedules, and update forecast to properly staff for demand surges.
- Empower agents with the skills they need to succeed using internal and external learning management platforms.

Workforce Optimization for HR key features

Automating employee coaching and training

Assess your team's performance and set coaching plans to improve their skills.

Integrated application data

Drive workforce optimization effectively by managing schedules, shifts, and queues for your teams. You can assess skills, automate agent recommendations based on those skills, and provide mentoring opportunities for employees.

Scheduling

Manage the scheduling for your organization from a central location. You can create shift plans, schedule plans, assign agents to shifts, and publish the schedules. Manage teams' approvals, swap agents' shifts, and forecast agent staffing scenarios.

Team performance

You can organize each of your teams into assignment groups. You can define a set of key Performance Indicators (KPIs) to analyze the performance of all groups within that team. From a central location, you can drill into the metrics for a group, an agent, or an incident within that team.

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Get started

Explore  Learn about how managers use Workforce Optimization for HR.	 Configure Plan and configure your implementation.	Use  Schedule, coach and train your agents.
Reference  Learn about the components and roles installed with Workforce Optimization for HR.		

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Workforce Optimization for HR

Use Workforce Optimization for HR to optimize your workforce and manage your teams efficiently.

Manage and monitor the real-time work being done by your agents across different channels and queues. Coach your teams so that they gain the skills that let you address the demands from your customers. Efficiently schedule your teams to provide better coverage with integrated channel management.

As a manager, you can monitor the demand for agents and skills in your organization to resolve issues. Assess agent skills, identify areas where they need improvement and provide training to enhance their skills set. Track your teams performance, and manage the schedule of all agents in your assignment group—all from a unified location.

As an agent, you can manage your own schedule, access the schedule of your peers and request time off or shift swaps.

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Manager workspace landing page

The landing page provides a real-time overview of the current workload and the team performance. View the following metrics using advance score cards, combo cards, and line charts having multiple data sets such as:

- KPIs: Today's cases, This week's case volume by status, Open cases by service, Last updated open cases by age (No of days)
- Closed cases - SLA met vs. SLA breached: Open case by backlog (line graph of closed cases), Open case by age (graph of 10-15 days, 15-30 days, more than 30 days)
- Approvals: You can see the list of approvals of time offs.

Scheduling

Access your teams' calendar to know which agents are scheduled for coverage and which agents have taken time off.

Using Scheduling, you can also:

- Assign agents to shifts.
- Define break time.
- Preview and publish team schedule.
- Approve agent time-off or shift-swap requests.
- Create on-call shifts and assign primary, secondary rotation groups to handle escalation scenarios.

For more information, see Scheduling in Workforce Optimization for HR.

Schedule Adherence

Access your teams' calendar to know which agents adhered to their planned schedules and make timely decisions to increase your team's performance by setting expected adherence targets.

Using Schedule Adherence, you can also:

- Configure and tweak the schedule adherence and conformance formulas and properties so that you can customize them for your organization.
- Access the schedule of all of your teams from one location and gain insights on whether your team is complying with published schedules.
- Analyze the historical time attendance of your team members.
- View planned versus actual historical data for your team and individual agents.

Teams

Monitor performance trends for your teams using KPI groups. Create a set of KPIs and apply them to all groups within a team and assess team performance from one location.

Using Teams, you can also:

- Identify all the teams you manage as well as the ones you have visibility into.
- Analyze the KPIs that are crucial for your team.
- Drill into agents within each team and monitor their performance.

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- Access each agent's profile to view details such as their manager, peers, and assignment groups.
- Drill down into each agent's skills or recommend them for coaching.

For more information, see Teams in Workforce Optimization for HR.

Coaching and Skills Assessment

Enhance the quality of work done by your agents using Coaching. Assess agent skills and recommend the ones that they require to resolve issues. Identify coaching opportunities based on the recommendation and train the agents to acquire those skills.

Using Coaching, you can also:

- Automate the scoring, grading, and assessment of agent skills.
- Use coaching opportunities to create assessments.
- Track training assigned to agents based on their assessments.
- Analyze the skill gap and recommend training.
- Managers can assign courses to agents from third-party learning management systems (LMS), such as Udemy, Pluralsight, and Cornerstone OnDemand.

For more information, see Coaching in Workforce Optimization for HR

Workforce Optimization for HR Manager Workspace Landing Page

The Manager Workspace landing page displays metrics of the on-going work and helps managers to take informed decisions.

The Workforce Optimization for HR Landing Page offers single-pane glass view into the key metrics and the KPIs.

- KPIs

  Today's cases

  Displays the number of cases that were resolved by agents on first contact by the customer.

  This week's case volume by status

  Displays the number of cases that have been in the same state for 30 days.

  P1 cases

  Displays the number of cases that have been re-opened by the customers after they were resolved.

  SLA breached cases

  Displays the number of open cases that are escalated by the customer or internally.

  Unassigned cases

  Displays the number of unassigned cases.

  SLA at risk cases

  Displays the number of cases with their SLAs at risk.

  Each score card also displays a graph that you can click to further analyse the cases.

- Work Items

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Open cases by service

Displays the total number of open cases. The combo card also displays the break-up of the open cases according to the current status: **New**, **Open**, and **Awaiting Info**.

Last updated open cases by age (no. of days)

Displays the graph of open cases that were created in the last 10-15 days, 15-30 days, and more than 30 days.

- Agents

Closed cases - SLA met vs. SLA breached

Displays the number of agents in the team and the break-up of agents according to current status: **Available**, **Offline**, **Break**, and **Away**.

Approvals

Displays the number of time-off requests by the agents that are pending manager's approval.

Shift swap requests

Displays the number of requests by the agents to swap shifts that are pending manager's approval.

Team performance

Displays a graph of the open cases and unassigned cases in the last 12 months.

Reassigned cases

Displays the number of requests that have been reassigned.

You can click the line charts to further view the list of cases.

- Critical open cases: Displays the list of open critical cases that were updated least recently. Click **View all** to view all the critical cases.

Get an overview of the Manager Workspace landing page and also learn on how to configure it using UI Builder as per your business needs.

Configuring Workforce Optimization for HR

Enable Workforce Optimization for HR and configure settings to use Scheduling, Teams, and Coaching applications.

Activate Workforce Optimization for HR

Workforce Optimization for HR solution is highly modular, offering a wide range of capabilities such as Scheduling, Coaching, and Teams applications in Manager Workspace. Configurable Workspace (sn_hr_wfo_workspa) plugin activates all other dependent plugins to enable users to access Scheduling, Coaching, and Teams applications in Workforce Optimization for HR.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.
   You can search for the plugin by its nae or ID/ If you cannot find a plugin, you might have to request it from ServiceNow personnel.

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3. Select **Install**, and then in the Activate Plugin dialog box, select **Activate**.

> **Note:** When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears:`Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>`

RCA approvals in Workforce Optimization for HR

After you install or upgrade to the latest Workforce Optimization for HR from ServiceNow Store, you might encounter Restricted Caller Access (RCA) approval messages.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Right-click the header and choose **Import XML**.
3. Click **Choose file** and select the XML file that you downloaded.
4. Search and find the HR Agent WS bulk RCAs approval script record.
5. Click **Run Script** to approve all the requested RCAs.

> **Note:** RCA fix script can approve the RCAs which exist at the time of execution. After running the RCA script (if you install the Document Templates from ServiceNow Store, Human Resources Scoped App: Lifecycle Events, and Human Resources Scoped App: Employee Relations plugins), re-run the RCA script to approve the new RCAs.

Workforce Optimization for HR Domain Separation

Domain separation is supported for Workforce Optimization for HR. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview

The goal of Workforce Optimization for Customer Service is to simplify the daily routine of HR Agent Managers to develop high-performing teams by optimizing schedules and work

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assignments, respond to ad hoc changes in real time, manage time-off requests and providing the skills they need to succeed—all in one workspace .

How domain separation works in Workforce Optimization for HR

Domain separation is supported.

Related topics

Domain separation for service providers

Setting up Scheduling for Workforce Optimization for HR

Manage events the team calendar. Create schedule plans, shift plans, event categories, and event types.

Configure event categories

Add event categories and create or update field configurations for events in the Manager workspace.

Before you begin

Role required: sn_hr_wfo.admin

The following event category configurations are available by default:

- Actual Work
- Break
- Meeting
- On-Call
- On-Call Time Off
- Time Off
- Training
- Work

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Scheduling** > **Event Categories**.
2. In the **Event Categories** list, click **New**.
3. In the **Name** field, enter a name for the event category.
4. If you want to exclude this event category for agent coverage calculation, enable the **Exclude from coverage** check box.
5. In the **Event field configuration** dialog box, edit the following configuration as necessary:

Note: You can remove any property that does not apply to a type of event.

```
{
            "create": {                 //Creates an event type
 form
                "attendees": {          //Adds the Attendees
 field
                "mandatory": true,      //Sets this field as
 mandatory
                "readOnly": false,      //Sets this field as
 read-only
```

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```
                "allowAllUsers": false //Allows you to only add
users managed by the logged-in user; to add any user, set this
value to true
                },
                "startDate": {
                "mandatory": true,
                "readOnly": false
                },
                "endDate": {
                "mandatory": true,
                "readOnly": false
                },
                "additionalSelectors": [    //Add custom fields
to the form
                {
                    "fieldLabel": "Select Shift", //Name of the
field that displays on the form
                    "table":
"sn_shift_planning_shift_plan", //Name of the table referenced
by the field
                    "field": "name", //Any field from the
selected table whose display values must be shown in the
custom field
                    "value": "",
                    "mandatory": true,
                    "additionalQueryString": ""
                }
                ]
            },
            "edit": {                   //Edit an event type
form
                "attendees": {
                "mandatory": true,
                "readOnly": false,
                "allowAllUsers": false
                },
                "startDate": {
                "mandatory": true,
                "readOnly": false
                },
                "endDate": {
                "mandatory": true,
                "readOnly": false
                },
                "additionalSelectors": [
                {
                    "fieldLabel": "Select Shift",
                    "table": "sn_shift_planning_shift_plan",
                    "field": "name",
                    "value": "",
                    "mandatory": true,
                    "additionalQueryString": ""
                }
                ]
```

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```
                }
            }
```

6. Click **Submit**.

Create event types

Create multiple events and add them to the team calendar.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Scheduling** > **Event Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

Event configuration form

Field	Description
Name	Name for the event type.
Category	Type of event, for example, meeting, break, or time off.
Priority Order	Priority of the event type that you want to exclude from the coverage. The higher the number means the higher the priority.
Color	Color that identifies this type of event in the team calendar.

4. Click **Submit**.

Configure schedule adherence properties

Configure schedule adherence properties to calculate the adherence to improve the operational efficiency of your organization.

Before you begin

Role required: sn_hr_wfo.admin

About this task

The threshold settings for adherence and conformance indicate how many minutes early or late an agent can clock in or clock out to a scheduled work shift without being considered as non-adherent.

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Schedule Adherence** > **Settings**
2. On the form, fill in the fields:

Schedule Adherence properties form

Field	Description
Enable Schedule Adherence	Calculation and information about the agents' adherence to the schedules.

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Field	Description
Threshold for early checkin for planned shift (in Minutes)	Time set early check in. This time is the acceptable time for an agent to start the work shift before the actual shift time. The default value is 60 minutes. For example, if an agent's planned work shift is 8 a.m. to 5 p.m., and the agent clocks in at 7 a.m., the threshold time allows flexibility and the agent is not considered as a non-adherent agent.
Threshold for adherence % of Time Worked Summary	Percentage set for a threshold in adherence. The agents who do not qualify to be above the defined threshold value (70%) are considered non-adherent agents.
Lower threshold conformance % of Time Worked Summary	Lower threshold percentage set for flexibility in conformance. The agents who do not qualify for the defined lower and upper conformance threshold values (80-120) are considered as non-conformant agents. The default value is 80%.
Upper threshold for conformance % of Time Worked Summary	Upper threshold percentage set for flexibility in conformance. The agents who do not qualify for the defined lower and upper conformance threshold values (80-120) are considered as non-conformant agents. The default value is 120%.
Default threshold time for clock-out event generation (in Minutes)	Default threshold time to generate an automatic clock-out event if an agent fails to clock out. The default value is 60 minutes. For example, if an agent's planned work shift is 8 a.m. to 5 p.m. and the agent fails to clock out at 5 p.m., the system waits for 60 minutes as the threshold time and generates an automatic clock-out event.

3. Click **Save**.

Modify schedule adherence and conformance formulas by using extension points

Configure and tweak the schedule adherence and conformance formulas using scripted extension points to customize them for your organization.

Before you begin

Role required: sn_hr_wfo.admin

About this task

Use the `sn_shift_planning.ScheduleAdherenceExtPt` extension point and create an implementation to configure the formulas. You can create multiple implementations. However, the implementation with the lowest order number is executed.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_shift_planning.ScheduleAdherenceExtPt`.
3. On the form banner, click the link **here** to edit the record.
4. To create your extension point script, click **Create Implementation** in the related links.
5. Modify the formulas for calculating the schedule adherence and conformance in the `getAdherencePercentage` and `getConformancePercentage` methods.

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```
var ScheduleAdherenceExtPt = Class.create();
ScheduleAdherenceExtPt.prototype = {
    initialize: function() {
    },

    getAdherencePercentage: function(plannedTime, timeNotWorked, availableNonPlannedTime, totalTimeWorked){
        var adherencePercentage;
        return adherencePercentage;
    },

    getConformancePercentage: function(plannedTime, timeNotWorked, availableNonPlannedTime, totalTimeWorked){
        var conformancePercentage;
        return conformancePercentage;
    },

    type: 'ScheduleAdherenceExtPt'
};
```

6. Click **Update**.

Result

The schedule adherence and conformance calculations are based on the formulas in the implementation.

Event type extension points in Workforce Optimization for HR

Use extension points to call scripts for event categories such as meeting, time off, or work time.

To see a list of extension points that you can use for Workforce Optimization for HR, navigate to **System Extension Points** > **Scripted Extension Points**. In the Extension Points list, open the *sn_shift_planning.EventManager* extension point.

Use scripted extension points to integrate customizations without altering the core components in the application code. When customizing a base application, you implement the scripted extension points by creating the custom script includes and registering them against the scripted extension points.

Extension points for event types

Extension points	Description
sn_shift_planning.EventManager	Implement this extension point to customize the logic for the event categories that you create.

You can use extension points to create events such as meeting, training, and time-off requests. For example extension point implementations, see the following extension instances in the Implementations related list:

Extension instances

Category	Extension Script
Meeting	*AgentScheduleMeetingEventManager*
Break	*AgentScheduleBreakEventManager*
Training	*AgentScheduleTrainingEventManager*
Time off	*AgentScheduleTimeOffEventManager*
Work	*AgentScheduleWorkEventManager*
On call	*AgentScheduleOnCallEventManager*

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Extension instances (continued)

Category	Extension Script
On Call Time Off	`AgentScheduleOnCallTimeOffEventManager`
Actual Work	`AgentScheduleActualWorkEventManager`

Setting up Teams in Workforce Optimization for HR

Organize your teams into assignment groups and create reports for those groups to can gain visibility into the team's performance.

As an administrator, you can configure KPIs as well as child KPIs. The child KPIs appear when you drill-down into top level KPIs. For example, Closed Cases KPI has P1 Cases, P2 Cases as child KPIs.

Create KPI Groups to monitor performance

Create key performance indicator (KPI) groups with the KPIs that matter most to your teams. When you associate your KPI groups with assignment groups, you can monitor your team's performance.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Create a KPI group.
   a. Navigate to **Workforce Optimization for HR** > **Team Performance** > **KPI Groups**.
   b. Click **New**.
   c. In the **Name** field, enter a name for the KPI group.
   d. In the **Type** menu, select **Teams**.
   e. Right-click the form header and click **Save**.

   You can add up to five KPIs to a KPI group.

2. Add KPIs to a KPI group.
   a. In the **KPIs** related list, click **New**.
   b. In the **KPI** field, select the KPI to apply for this group.
   c. Click **Submit**.
3. Add KPI assignment groups to the KPI group.

   Note:
   - You can associate a KPI assignment group only to one KPI type.
   - You can add additional managers to each assignment group.
   - You can associate a user with a KPI group as the primary assignment group for that user.

   a. In the **Assignment Groups** tab, click **Edit**.
   b. Move the desired assignment groups from the Collection to the Assignment Groups list.
   c. Click **Save**.

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Add managers to a KPI assignment group

Add managers to a KPI assignment group.

Before you begin
Role required: sn_hr_wfo.admin

About this task
You can associate a user with a primary assignment group by selecting the group in the user

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Team Performance** > **Additional Managers**.
2. Click **New**.
3. In the **Assignment Group** field, select an assignment group.
4. In the **Manager** field, select a manager you want to add for this assignment group.
5. Click **Submit**.

Setting up Coaching in Workforce Optimization for HR

Manage agent skills and assess the quality of completed tasks. Use predictive intelligence to recommend skills for agents. Train your agents with internal and external learning content.

Configure an indicator to display in the Coaching Overview tab in Workforce Optimization for HR

Add a system property to display the desired indicator in the Coaching Overview tab in the Coaching application.

Before you begin

Important: This feature is available with the Workforce Optimization for HR from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for HR.

Set the map application scope to **Coaching**. For information on how to set the scope, see Set map application scope.

Role required: sn_hr_wfo.admin

About this task
Replace the existing indicator with any Performance Analytics indicator that has the Assigned to and Assignment group breakdowns to display in the Coaching Overview tab in the Coaching application.

Procedure

1. In the application navigator, enter `sys_properties.list`.
2. Click **New**.
3. Enter the following field values.

Configure an indicator form

Field	Value
Name	sn_coaching.coaching_overview_default_quality_indicator

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Field	Value
Application	Coaching
Type	string
Value	{"title": "<name>", "sys_id": "<sys id>"} where <name> is the name of the indicator that you want to display in the Coaching Overview tab and <sys id> is the unique record identifier Example: ○ Name: % of P1 incidents resolved on first call. ○ Sys ID: 0423e59387401010ca99e12397cb0bbb {"title": "% of P1 incidents resolved on first call", "sys_id": "0423e59387401010ca99e12397cb0bbb"}
Read roles	sn_coaching.coach

4. Click **Submit**.
   The configured indicator replaces the existing indicator in the Overview tab in the Coaching application in Workforce Optimization for HR.

Setting up skill prediction in Workforce Optimization for HR

Collect skill data based on skills agents have used for case resolution. Use supervised learning to recommend these skills for agents to resolve similar open case. You can also find patterns in how skills are used for case resolution and use unsupervised learning to recommend skills for agents.

Before you begin

Set up skills. For more information, see Skills Management.

Predictive Intelligence must be set up and configured on your instance to train the models. For more information, see Predictive Intelligence.

Activate the Skill Recommendation application plugin (com.snc.sre) to use predictive intelligence for recommending skills.

Role required: sn_hr_wfo.admin

Procedure

1. Configure the skill prediction property.
2. Run the solution definition models such as *`Recommend similar skills for cases`* or *`Recommend skills from similar cases`* to train the supervised and unsupervised solutions.
   For more information on training a solution, refer to Create and train a similarity solution.
3. Run the *`Start skill prediction`* scheduled job everyday to start predicting skills for cases or agents.
   This scheduled job is inactive by default. When you activate it, the job runs daily at 1:00 AM on all cases resolved the previous day. The job then adds the skills to the User Predicted Skill [sn_sre_user_predicted_skill] table and Task Predicted Skill [sn_sre_task_predicted_skill] table.

   Note: Recommended skills will start appearing once the number of records in [sn_sre_task_predicted_skill] table exceeds the value defined in the [sn_sre.user_predicted_skill_threshold] .

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Use extension points for skill prediction in Workforce Optimization for HR

Use scripted extension points to customize skill prediction for tasks.

Before you begin

The Skill Recommendation extension point is included with the Skill Recommendation (com.snc.sre) plugin.
Role required: sn_hr_wfo.admin

About this task

You can create multiple implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed.

Procedure

1. Navigate to **All** > **System Extension Points** > **Client Extension Points**.
2. From the Extension Points list, select **Skill Recommendation** (sn_sre.SkillPredictionAPI).
3. Do one of the following:
   - To create a new skill recommendation implementation, click **Create Implementation**.
   - To modify an existing implementation, from the **Implementations** related list, select a class.
4. Modify the script as required.
5. Click **Update**.

Configure a list menu to display in the Learning tab in Workforce Optimization for HR

Add list or list categories to modify the list menu for Coaching with Learning in the Coaching application in Workforce Optimization for HR.

Before you begin

Important: This feature is available with the Workforce Optimization for HR Configurable Workspace from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for HR.

Set the map application scope to **Coaching With Learning**. For information on how to set the scope, see Set map application scope.

Role required: sn_hr_wfo.admin

Procedure

1. In the application navigator, enter `sys_ux_list_menu_config.list`.
2. Click **Learning list** record.
3. Under UX list category, click **New**.
4. On the form, fill in the fields:

List category form

Field	Value
Title	Enter the name of the list category.
Description	Enter a short description about the list category.
Order	Enter a value to set the position of the list category in the current list.

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Field	Value
Active	Select the check box to make the list category visible.

5. Click **Submit**.
6. Under UX Lists, click **New** to create lists under that list category.
7. Enter the following field values.

UX list category form

Field	Value
Title	Enter the name of the list.
Table	Select the table for the data that you want to display in the list.
Configuration	Select **Learning List**.
Columns	Select the columns that you want to display for the table.

8. Click **Submit**.
9. Click **Update**.

Setting up Demand Forecast in Workforce Optimization for HR

Configure the data you want to collect, modify forecast parameters and calibrate manual adjustments using Demand Forecast.

Configure data collection for Demand Forecast

Define the data you want to collect for cases, interactions, or any table to forecast the number of agents that you require for your staffing needs.

Before you begin

You must have the MetricBase plugin [com.snc.clotho] enabled to use Demand Forecast in Workforce Optimization for HR. For more information, see Requesting the MetricBase product.

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Demand Forecast**.
2. Define the data you want to collect for forecasting agents to resolve cases.
   a. Click **Data Collection Definitions**.

      See the Components installed with Workforce Optimization for HR for the list of configurations that are available by default.

   b. Click **New**.
   c. On the form, fill in the fields:

Forecast Configuration form

Field	Description
Name	Name for the collection forecast configuration.

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Field	Description
Table	Table that is used for collecting data.
Type	Data Collection Definition type is set to **Collection** by default and collects data using a scheduled job.
Date Field	Data that you can add to forecast for the future.
Conditions	Conditions that you can set so that you can capture the data that you need.

d. Click **Submit**.

e. Create an index for the table you have created using the date field and the conditions you have added to the table. For information on creating a table index, see Create a table index.

Add parameters to be defined in the formula

Add parameters to be defined in the formula to calculate agent count per hour in a day.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Demand Forecast** > **Formula Parameters**.
2. In the **Name** field, enter a name for the parameter.
3. Do one of the following:
   - If you need to add a value to be calculated for the formula, in the **Value** field, enter a value.
   - If you want to use the performance analytics score card API or a custom API, select **Advanced**, and add a script.

   The Average Case Work Time and Average Chat Work Time forecast parameters provided by default are examples of how you can use scripts to add the parameters. For a list of parameters provided by default, see Components installed with Workforce Optimization for HR.
4. Click **Submit**.

Configure resource conversion formula

Configure the resource conversion formula.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Demand Forecast** > **Resource conversion formula**.
2. Click **New**.
3. On the form, fill in the fields.

Forecast Configuration form

Field	Instructions
Name	Name for the resource forecast configuration.
Type	Type is set to **Resource Conversion Formula**.

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Field	Instructions
Formula	Formula to calculate the forecasted number of agents that you need. In the Related Links section, do the following: ○ Click **Browse Forecast Configuration**, select the forecast configuration to add to the formula and click **Add**. ○ Click the Browse Forecast Parameter, select the forecast parameter to add to the formula and click **Add**. **Note:** **FC** refers to Forecast Configuration and **FP** refers to Forecast Parameter.

4. Click **Submit**.

Group forecast configuration

Associate an assignment group with a Resource Conversion Formula. You can assign a forecast configuration to multiple assignment groups, but an assignment group can have only one forecast configuration.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Demand Forecast** > **Group Forecast Configuration**.
2. Click **New** and fill in the fields on the group forecast configuration form.
   - In the **Assignment Group** field, browse and select the group to which you want to associate a forecast configuration.
   - In the **Forecast Configuration** field, browse and select a **Resource Conversion Formula**.

Modify forecast parameters to visualize forecast data

Configure and tweak forecast parameters to see how the forecast behaves when you vary the period length, periods to forecast, or algorithm. You can view the modified forecast on the time-series visualization.

Before you begin
Role required: sn_hr_wfo.admin, sn_hr_wfo.manager

The user with these roles must also be a manager of the assignment group that is associated with the resource conversion formula.

About this task
You can define the start and end dates for which you want to visualize the forecast data. The start date for a forecast configuration is based on the number of historical days you want to consider for data visualization. This is set using the *sn_agent_forecast.number_of_historical_days_in_timeseries_chart*.

The published forecast is reflected on the team calendar only when the **Forecast resources for future** job is executed.

The default start date is set to 3 days ago starting from the day before the current day. The end date is calculated based on the period length and the periods to forecast represented in days.

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For example, if the period length is 1 day and the periods to forecast is 30, then the end date is 30 days including the current day. Forecast can be generated for a maximum period of 90 days.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule () icon.
3. Click **Forecasts**.
4. Select the forecast model for which you want to view the time-series data.
   You can visualize each of the forecast parameters that were created for the forecast model.
5. Click the gear ()icon.
6. Click the plus (+) sign.
7. Configure the forecast parameter.
   a. From the **Period length unit** list, select the unit for the length of the period to forecast.
   b. In the **Period length** field, enter the duration of the period to forecast.
   c. In the **Periods to forecast** field, enter the number of seasons, which is the period length, for which you want to forecast.
   d. In the **Algorithm** field, select an algorithm you want to use to calculate the forecast.
   e. Click **Update**.
   The forecast is created in **Draft** state. The forecast is calculated and displays in the forecast model. You can analyze the forecast with the new forecast parameters before you publish it.
8. To preview a forecast before publishing it, click **Preview**.
   The forecast is calculated using the algorithm and parameters configured in the forecast parameter. When you create a manual adjustment to predict future resources, Demand Forecast overlays the adjustment in the time-series chart.

When you	Then the forecast
Unpublish a published forecast	Become inactive.
Preview an inactive forecast para meter	Displays for the date range for which the forecast para meter was active.
Preview an active forecast	Displays the time-series data for the future time-period.

9. Publish the forecast parameters.
   - To publish a newly created forecast parameter, click **Save** and then click **Publish**.
   - To publish an active forecast parameter, click **Publish**.

   Note: You can only have one forecast in **Published** state, which is used to calculate the resources.

   When the forecast parameter is published:
   - The state of the record changes to **Published**.
   - The **Forecast resources for future** job runs daily and uses the published forecast parameters to calculate the agent forecast. The calculation uses the resource conversion

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formula to calculate the forecast data from the current point forward. You can view the updated resources in the team calendar.

- Any other forecast parameters that were created would be unpublished and inactive.

Create a manual adjustment for a forecast

Adjust forecasts manually to fine-tune them for greater accuracy. Create the adjustment for a specified time period and analyze how it impacts your forecast.

Before you begin

Role required: sn_hr_wfo.admin

The user with these roles must also be a manager of the assignment group that is associated with the resource conversion formula.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule () icon.
3. Click **Forecasts**.
4. Select the forecast model for which you want to make a manual adjustment.
5. Click the Manual Adjustments () icon.
6. Make a manual adjustment.
   a. Click the plus (+) sign.
   b. On the form, fill in the fields:

Manual adjustment for forecast

Field Name	Description
Name	Name for the manual adjustment.
Start Date Time	Date and time when the manual adjustment for the forecast must start.
End Date Time	Date and time when the manual adjustment for the forecast must end.
Adjustment Unit	Unit for the manual adjustment. Available units: ▪ Percentage—adjustment value percentage. For example, if the forecast data shows case count and if the adjustment value is 15, the manual adjustment shows a 15% increase in case count than the forecast data. ▪ Number—adjustment value count. For example, if the forecast data shows case count and if the adjustment value is 15, the manual adjustment shows 15 more cases than the forecast data.
Adjustment Value	The numeric value for which you want to adjust the forecast. The value is applied to each group in the Groups [sys_user_groups] table. The manual adjustment visualization on the time-series chart displays the data for your groups. For example, let's assume that the value is 15 and the unit is number. If you have two groups for a forecast model and both have 2 agents each before you do the

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Field Name	Description
	manual overlay, when you enter the value as 15, it is applied to each of the two groups and the total value displays as 34. This is calculated as follows: ▪ Two agents for group A + the adjustment value 15 = 17 ▪ Two agents for group B + the adjustment value 15 = 17 The total is 34. If you have two groups for a forecast model and both have a volume (for example: Cases/ Chats) of 2 before you do the manual overlay, when you enter the value as 15, it is applied to each of the two groups and the total value displays as 34. This is calculated as follows: ▪ Two cases/chats for group A + the adjustment value 15 = 17 ▪ Two cases/chats for group B + the adjustment value 15 = 17 The total is 34.

c. Click **Save**.
The manual adjustment is created in **Draft** state. The manual adjustment is calculated and displays as a green line in the forecast model. You can analyze or update the forecast with this manual adjustment before you publish it.

7. Publish the manual adjustment.

a. Click the saved manual adjustment that you want to use for forecasting resources.

b. Click **Publish**. The state changes to **Ready to Publish**.
When the **Forecast resources for future** job is run, it calculates the forecast, checks for manual adjustments, applies those values if any, and moves it to the **Published** state.

Note:

- When you unpublish a forecast, it moves to **Draft** state. You can delete a forecast that is in **Draft** state.
- If you want to end a manual adjustment after it has started and before its end date, you can click **End Now**.

The forecast will no longer be used in the resource conversion formula.

When the manual adjustment is published:

- The state of the record changes to **Published**.
- The adjusted values will be used in the resource conversion formula and the demand forecast displayed on the calendar.
- Any other manual adjustment configurations that were created would be unpublished and moved to **Draft** state.

Using Workforce Optimization for HR

Enhance the quality and efficiency of your teams using smart scheduling, team structure, and real-time refreshing single scores. Monitor chat conversations and help agents on cases. Assess the quality of tasks completed, recommend skills for agents, and train them to address skill gaps.

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Workforce Optimization for HR Manager workspace

Monitor your teams' work and organizational performance using Workforce Optimization for HR. Stay on top of the status of cases your teams are working on at a given time.

Landing page

End user and roles

End user and roles

End user and goal	Required role
As a workspace manager, you can: • Analyze the cases your team is currently working on or cases that have not yet been assigned. • Monitor cases with SLAs that have been breached, escalated, or the ones not been open since 30 days. • Track team's work, chats, and work assignments to analyze the performance of your whole organization.	sn_hr_wfo.manager

Monitor your agent's work when you start your day, view reports that need your attention, and navigate to the cases on which you want to take action. Analyze the performance of a specific team for a desired time period by selecting the team from the Teams list and also the desired date range.

Today's cases

Total number of open cases that are waiting to be worked on by agents. The total count is divided into **New**, **Open** and **Awaiting info** cases.

This week's case volume by status

Total count of cases and interaction that are in queue for the week.

Open cases by service

Graph of open and unassigned cases and graph of open cases since 10-15 days, 15-30 days, more than 30 days

Open cases by service

Title	Type	Description
Today's cases	Single score	Total number of open cases that are waiting to be worked on by agents. The total count is divided into **New**, **Open** and **Awaiting info** cases.

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Open cases by service (continued)

Title	Type	Description
This week's case volume by status	Single score	Total count of cases and interaction that are in queue to be assigned to agents.
P1 cases	Single score	Number of P1 cases.
SLA breached cases	Single score	All the agents that you manage. The total count is divided into **Available**, **Break**, **Away** and **Offline** agents.
Time-off Requests	Single score	Requests made by agents to take time-off from work.
Unassigned cases	Single score	
SLA at risk cases		
Open cases by service	Single score	Requests made by agents to swap shifts with other agents.
Closed cases	Line and Stacked bar chart	Graph of open and unassigned cases and graph of open cases since 10-15 days, 15-30 days, more than 30 days
Team performance	List	List of all open critical cases that were updated least recently.

Teams in Workforce Optimization for HR

Use Teams to track and analyze performance trends for your teams from a single location. You can monitor the trends for each agent within your team and compare your agents or team members with one another.

With Teams, you can do the following:

- Identify skill gaps so that you can recommend which skills are needed to coach your agents.
- Organize your teams into assignment groups. You can add a set of key performance indicators (KPIs) to help you measure team performance consistently across the groups.
- Compare KPIs between multiple teams belonging to the same KPI group.
- View the KPIs between the selected date range.
- Drill down into a Team level KPI to view the split of KPIs across all individual team members.
- View the KPI trend to analyze the future forecasts for each of the KPIs, if the date range has the latest values.
- Targets can be set on the KPIs through the team performance page at the global or individual level. When such targets are set, the trendline reflects the targets.
- Drill down to the individual agent level to view a 360 degree view of the current work, historical KPIs, presence history, channel capacity utilization, skills, and upcoming time-offs.

Analyze performance trends

Analyze trends to monitor your team's performance and adherence within a KPI group.

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Before you begin
Role required: sn_hr_wfo.admin, sn_hr_wfo.manager

About this task
Analyze the data by drilling down into the data for a team, a specific team member, an indicator, or a case.

Procedure
1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon.
3. Select a date range to view your teams' performance for that time period.
   You can set the default date range using the *sn_team_perf.default_date_range*.
4. Analyze team performance.
   a. Select a team.
   b. In the **Performance** tab, track and analyze the overall indicator performance for all members in the team.
   c. Drill down into the data for this team:

Analyze team performance

To	Do this
Analyze indicator performance	▪ To analyze the indicator performance for the team, click an indicator value for the team in the header row. ▪ To analyze indicator performance for a team member, click an indicator value for the team member.
Track cases	Click the **Tasks** tab and analyze all cases related to the team. ▪ To view the cases details, select a case. ▪ To view the a team member's details, select a team member.

You can also review cases, details of assignment groups, additional managers, and information relevant to the team.

Scheduling in Workforce Optimization for HR
Use Scheduling to manage your workforce resources efficiently by planning and managing schedules, staffing, and shifts across your teams all from one location. You can also integrate with on-call scheduling and create shifts and schedule for on-call rotations.

With Scheduling, you can do the following:

- Add meetings, training, time-off requests, or ad hoc work shifts by using the team calendar.
- Filter agents in the team calendar based on their location, region, assignment groups, or any field in the agent's record.
- Create shift and schedule plans for agents.
- Approve or reject agents' time-off and shift-swap requests.
- Track and manage the team's schedule on the team calendar by viewing the planned shifts versus the actual clock-in and clock-out times for the selected day or week.

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- Analyze whether your team members are following the schedules. If you see a potential issue, you can easily alert your team so that they can take immediate action.
- Use historical adherence reports to analyze and recommend coaching opportunities for your agents.

To delve into more information behind your key performance indicators, filters and sidebars, see Exploring indicators with KPI Details

Create a shift plan

Schedule shifts for your team to make sure you cover all work assignments and breaks. You can also specify the days of the week that you want to override scheduled shifts.

Before you begin

Role required: sn_hr_wfo.admin

About this task

In the **Shifts** tab, the shifts are grouped by active and inactive shifts. The contextual side panel displays the active and the inactive shifts in the order that they are displayed in the **Shifts** tab.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click the **Shifts** tab.
4. Click the plus (+) icon.
   - To create a work shift, see Create a work shift.
   - To create an On-call shift, see Create an on-call shift.

Create a work shift

Create a work shift.

Before you begin

Role required: sn_hr_wfo.admin

Create a shift plan. Create a shift plan

Procedure

1. Click **Work shift**.
2. In the **Name** field, enter a name for the shift.
3. Select the time window for the shift.
   a. In the **Time Zone** field, select the time zone of the users that you want to allocate to the shift.

      Note: To add a shift for agents working in their local time zones, select the **Use agent time zone** option. The system uses the time zone that is specified in the agent's user record.

   b. In the **Start Time** field, enter the time of day when you want to start the shift.
   c. In the **End Time** field, enter the time of day when you want to end the shift.

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4. Select the days of the week for which you want to add this shift.
5. Click **Save**.

Add schedule breaks to a shift

After creating a work shift, you can add schedule breaks to the shift.

Before you begin

Role required: admin

Before adding schedule breaks to a shift, make sure to create a shift plan and a work shift. See, Create a shift plan. Create a work shift, Create a work shift.

Procedure

1. Select the shift that you created.
2. Click **Add break**.
3. In the **Name** field, enter a name for the break.
4. Set a duration for the break.
   - In the **Duration** field, enter the length of time for the break.
   - In the **Earliest Start time** field, enter the earliest time to start the break.
   - In the **Latest End time** field, enter the latest time to end the break.

     For example, you can set the earliest start time as 11:00, the latest end time as 15:00, and the duration of the break as one hour. If you add four agents to the work shift, the Scheduling application automatically staggers the break duration for each agent. Stagger breaks to ensure that four of your agents can cover the entire shift span.
5. Click **Save**.

Create an on-call shift

Create on-call shift.

Before you begin

Role required: sn_hr_wfo.admin

Create a shift plan. Create a shift plan

Procedure

1. Click **On-call shift**.
2. In the **Name** field, enter a name for the shift.
3. From the **Group** field, select a group that you want to assign for the shift.
4. Select the time window for the shift.
   a. In the **Start Time** field, enter the time of day when you want to start the shift.
   b. In the **End Time** field, enter the time of day when you want to end the shift.
   c. From the **Time Zone** menu, select the time zone of the users that you want to allocate to the shift.
5. Select the days of the week for which you want to add this shift.
6. Click **Save**.

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Create on-call rotation

After creating on-call shift, create on-call rotation to be able to rotate the shift among employees.

Before you begin
Role required: admin

Before create the on-call rotation, create an on-call shift. See, Create an on-call shift.

Procedure

1. Select the shift that you created.
2. Click **Create rotation**.
3. From the **Agents** field, select the names of the agents you would like to be part of the shift. When you click the field, the name of all agents that belong to the group that the on-call shift is being created for is displayed.
4. From the **Rotate interval** field, select if you want the rotation to be daily or weekly.
5. Click **Save**.

   Note: The **Escalation Type** field is auto-populated with **Rotate through rosters** field value if multiple rosters have been created for the rotation. If not, it is populated with **Rotate through members** field value.

6. Click **Publish** to make the shift active and publish it on the schedule.

Create a schedule plan

Manage your team's schedule by creating a schedule plan that covers a span of time and includes your team's work shifts. You can also assign agents to shifts based on their skills and availability. This way, you can make sure that you are using your resources in the best way possible for your organization.

Before you begin
Role required: sn_hr_wfo.admin

About this task
You can set the number of days to cache agent schedules using the *sn_shift_planning.number_of_days_to_cache*. The **Total coverage/demand** row displays the number of agents covering each shift in a day. The day view displays the demand for the number of agents forecast for every hour in a day. For example, 4/5 shows that you have four agents scheduled for an hourly time slot, 11 AM to 12 PM and the agent demand forecast for that hour is 5.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule () icon.
3. Create a schedule plan.
   a. Click the **Team Calendar** tab.

      Note: You can analyze the staff alignment for a day or for the week.

   b. In the contextual side panel, click the show schedules icon  to display the schedules.

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c. In the Schedules panel, click + icon.

d. In the **Name** field, enter a name for the schedule plan.

e. From the **Start Date** field, select a date to start the schedule plan and click **OK**.

f. From the **End Date** field, select a date to end the schedule plan and click **OK**.

g. Select the required assignment group. f you want to assign the schedule to the groups you manage, select **Groups I manage**. If you want to specify groups, select **Specify groups** and browse for groups.

h. Click **Save schedule**.
You can view the schedule of all agents in the assignment group that you directly or additionally manage.

4. Add a work shift to the schedule plan.

> **Note:** To add more shifts to an existing schedule plan, select the schedule plan and then add the work shift.

a. In the contextual side panel, click **Add Shift**.

b. In the **Shift** field, select the work shift that you want to add to the schedule plan.

5. Add agents to the work shift.

a. In the **Agents** field, search for agents and add one or more agents to add to the shift.

b. Click **Save**.

> **Note:** It may take a few minutes for the screen to refresh.

Publish a schedule plan for visibility into team coverage

Generate a preview of your schedule plan and publish it so that your agents can see their shifts and schedules ahead of time. You can unpublish a schedule to make changes and then publish it again.

Before you begin
Role required: sn_hr_wfo.admin

About this task
You can make a copy of a schedule and update it to create a new schedule. Updates could include modifying the schedule start and end dates as well as adding or removing shifts or agents.
When you make a copy of the schedule, the following updates are automatically made to the schedule copy:

- The start date is set to the current date and the end date to 30 days from the current date.
- The schedule state changes to **Draft**. You can make the necessary changes to the shift and click **Save**.
- The schedule only displays agents in the assignment group of the current logged in user.

You can also unpublish a schedule make updates, and then publish it again.

- If the start date is the either the current date or had occurred in the past, the schedule state remains as **Published** and the end date changes to tomorrow.
- If the start date is in the future, the scheduler changes the schedule state and agent schedules to **Draft**.

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ().
3. Generate a schedule preview.
   a. Click the **Team Calendar** tab.
   b. Click the Show Schedules () icon to display in the contextual side panel.
   The team calendar refreshes and generates the preview when you save a work shift.
4. Publish a schedule.
   a. Select a schedule and edit the schedule if necessary.
   b. Edit the schedule if necessary and click **Save**.
   c. Click **Publish**.

   Note: You can click **Delete** in **Draft** state and delete the schedule if you no longer need it.

Result

All the schedules that are in **Draft** state move to **Published** state. You can view the published schedule in the team calendar.

Track and manage team schedule

Create, update, or monitor your teams' schedule from one location. You can approve or reject requests for swapping shifts or time off for agents within your assignment group.

Before you begin

Role required: sn_hr_wfo.admin

About this task

Using the calendar, you can do the following:

- View all of your agents by assignment group.
- Get insights into team compliance with published schedules.
- View agent's work schedule that is actual shift time vs clock-in and clock-out times.
- Filter the team calendar based on the **Assignment Group**, **Location**, **Skills**, **Shift Plan**, and **Events** for a customized view.
- Modify agent's shift, clock-in, and clock-out timings, if required.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule () icon.
3. Modify an agent's shift timings.
   The schedule that includes this shift must be in **Preview** or **Published** state.
   a. In the **Team Calendar** tab, navigate and point to the shift for the agent that you want to modify the schedule for.
   b. In the shift pop-up window, click the Edit () icon.
   c. Modify the agent's shift time as desired.

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Note: If the existing shift has a break, you can add more breaks to the shift.

d. Click **Save**.

The following snapshot helps you to view the time worked summary for the selected agent.

4. Approve or reject an agent's time off or shift-swap with another agent.

Note: You must approve a request two days before the time-off or shift-swap start date. If not, the approval is auto-rejected. An administrator can change this default setting. For more information, see **Setting the due date for time-off and shift-swap request approvals** in Overlapping time-off requests by an agent are rejected.

a. Click **Approvals**. You can view all agent requests in your queue and the details for each request.

b. Select a request that you want to approve or reject and do one of the following:

- To approve a request, click **Approve**.
- To reject a request, click **Reject**.

If you approve the request, the schedule gets updated in the team calendar based on the approvals.

Monitor schedule adherence

Use schedule adherence to evaluate whether or not your agents are adhering to their assigned schedules. You can look for areas where low-value activity can be eliminated or reduced and further analyze staffing levels throughout the day.

Before you begin

Role required: sn_hr_wfo.admin

About this task

- Adherence is a metric to analyze how closely agents follow their schedule in completing the work assignments. Conformance measures the work completed, regardless of when it was completed.
- A high adherence rate indicates that agents are sticking to their schedules and offering customer service when expected. Low adherence suggests changing the processes or decisions to manage the team efficiently. The numbers are highlighted in red for non-adherent agents.
- Schedule adherence and conformance calculations are based on the formulas, agents' actual and planned work timings. The following are the default formulas that are used to calculate adherence and conformance for agents. However, your administrator can change the formulas, as required. The following components and formulas are used to calculate adherence and conformance:
  - The *shift_planning_clock-in* and *shift_planning_clock-out* scripts generate the agents' clock-in and clock-out events from the login and logout sessions. The business rule *Agent Time Work Event Trigger* generates clock-in and clock-out events whenever there is a change in agent's presence state.
  - **Schedule Adherence**= (Minutes worked in shift/Scheduled shift time in minutes + Overtime)
  - **Conformance**= (Minutes worked in shift + Overtime)/Scheduled shift time in minutes
- The ideal adherence percentage by default is above 70, and conformance is between 80–120. However, your administrator can change the threshold values. The agents who do not qualify to the defined threshold values are considered as non-adherent and are highlighted in red.

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. Monitor the schedule adherence of your agents.

Schedule adherence

To	Do this
View schedule adherence at organization or team level	**a.** Click the **Schedule Adherence** tab. The bar chart appears with the schedule adherence percentage and conformance percentage of your teams. **b.** Click the bar to view the graph and drill down further to view the analytics of your team members.
Analyze planned vs actual scheduling for your team members	**a.** Click the **Team Calendar** tab. **b.** Select the date. **c.** Click the bar representing the agent's actual time worked of an agent to view the **Time Worked** summary. **Note:** The clock-in and clock-out timings are the actual work timings of your agents. The events are generated based on the agent's login, logout actions, and presence state. If an agent forgets to clock-out, the system automatically generates the clock-out event after 60 min, by default. However, your administrator can change it using *`Default threshold time for clock-out event generation (in Minutes)`*. Example: A clock-in event gets generated when an agent logs in or changes the presence status to **Available**. Similarly, a clock-out event gets generated when an agent logs out of the system or changes the presence status to either **Offline** or **Break**. If an agent fails to clock-out even after 60 min of the shift end time, the system automatically generates the clock-out event.

Analyze adherence and conformance

View the time worked summary of your team members to determine if your teams are adhering to the planned schedules. You can also use historical adherence, which is a reporting view of real-time adherence, to see how well your agents have followed their schedules in the past.

Before you begin

s
Role required: sn_shift_planning.admin

About this task

Adherence and conformance calculations are based on the defined configuration and your agents' actual and planned work schedules.

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Note: Your administrator can disable schedule adherence or change the configuration for adherence and conformance. For more information, see Configure schedule adherence properties.

Procedure

1. Navigate to **All** > **Workspaces** > **Manager Workspace**.
2. Drill down to view the time attendance and time worked summary of your agents.

View time attendance and time worked

To	Do this
Analyze time worked summary of your team	**a.** Click the Lists ( ) icon. **b.** Under Schedule Adherence, click **Time Worked Summary**. **Note:** The **Available Non Planned** time captures the time the agent was available and clocked in outside of the agent's scheduled work events. For example, if an agent is scheduled to attend a training from 13:00 to 14:00, but forgets to clock out that attendance, then that time is considered as the clocked-in time. Therefore, the training time from 13:00 to 14:00 will be captured as the available non-planned time.
View your agents' time attendance	**a.** Click the Lists ( ) icon. **b.** Under Schedule Adherence, click **Time Attendance**.

Example:
To understand the computations of the fields in a time worked summary, let's consider Fatima Alonzo's work day:

- Shift time begins at 8 a.m. and goes to 5 p.m. = 8 hours
- Planned time = 8 hours = 480 minutes
- Clocks in 8 a.m. and clocks out at 12 p.m. for a break. Back from the break, clocks in at 12:30 p.m. and clocks out at 5:05 p.m.
- Minutes worked in shift = 480 - 30 = 450 minutes
- Schedule adherence= (minutes worked in shift/scheduled shift time in minutes + overtime) = 450/(480+65) = 82.57%
- Conformance= (minutes worked in shift + overtime)/scheduled shift time in minutes = (450 + 65) / 480 = 107.29 percent.

Note: Fatima Alonzo is adherent because the schedule adherence and conformance are within the threshold. To see which agents are non-adherent, look for the numbers that are highlighted in red.

Analyze staff alignment using Demand Forecast in Workforce Optimization for HR

Use Demand Forecast to plan the number of staff members that you require so that you have enough agents to do the job.

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Before you begin
Role required: sn_agent_forecast.user

About this task
Using Demand Forecast, you can:

- Monitor agent or team shift coverage for any day or week.
- Analyze if you are overstaffed, understaffed, perfectly staffed, or not aligned well with your staffing needs.
- Adjust the staff alignment depending on the coverage you need and the schedule of your teams.
- Analyze staff alignment as you are creating a schedule.
- You can analyze the agent coverage you have and the actual demand for the number of agents based on assignment groups and work shifts in a day.

Procedure
1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click the **Team Calendar** tab.
4. Analyze staff alignment for each shift.
5. You can click the filter icon and select the assignment groups and shift plans for which you want to view the staff alignment.

To analyze staff alignment	Do the following
For each day	Select **Day** from the list. The **Total resources needed** row displays the demand for the number of agents for that day at the selected intervals of 15,30, and 60-minute. For example, at 15-minute intervals, a number 16 between 0700 and 0715 means that the agent demand forecast is 16. The time slots are color-coded as below to show the cover age of agents in a particular interval: **Color code legend** **Highlight color for each day for a group** / **Description** Green / The number of agents you have scheduled for that interval and demand for that interval are an exact match—your staffing needs are perfectly aligned. Yellow / The number of agents you have scheduled are more than the demand you have for that interval.

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<table>
<tr><th>To analyze staff alignment</th><th>Do the following</th></tr>
<tr><td></td><td>
<table>
<tr><th>Highlight color for each day for a group</th><th>Description</th></tr>
<tr><td>Red</td><td>The number of agents you have scheduled are less than the demand you have for that interval.</td></tr>
<tr><td>Grey</td><td>The demand for the number of agents and the number of agents scheduled is zero for that interval.</td></tr>
</table>
</td></tr>
<tr><td>For a given week</td><td>
a. Select Week from the list.

The Total coverage/demand row has indicators for the staff alignment.

Indicators
<table>
<tr><th>If the row displays</th><th>Then</th></tr>
<tr><td>An arrow points downward</td><td>The predicted forecast is lower than the number of agents you need for that day</td></tr>
<tr><td>An arrow points upward</td><td>The predicated forecast is higher than the number of agents you need for that day</td></tr>
<tr><td>A check mark</td><td>The perfect alignment of the predicted forecast and the required number of agents.</td></tr>
</table>
b. Click any of the indications displayed in the Total cover age/demand row to analyze further details on the fore cast.

You can also view the coverage and demand for every hour for each group.
</td></tr>
</table>

Add events to a team calendar

Create a meeting, training, time-off request, or an adhoc work event from the team calendar.

Before you begin
Role required: sn_hr_wfo.admin

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Procedure

1. Navigate to **All** > **Workspaces** > **Manager Workspace**.
2. Click the Schedule () icon.
3. Click the **Team Calendar** tab.
4. Click **+New**.
5. Create an event.

To	Do this
Create a meeting, training, or time-off request.	**a.** Do one of the following: ▪ To schedule a meeting, select **Meeting**. ▪ To create a training event, select, **Training**. ▪ To create a time-off request, select **Time-off**. **b.** Fill in the event form. **i.** In the **Title** field, enter a name for the meeting. **ii.** Add the required names for the event: ▪ For a meeting, in the **Attendees** field, enter the names of the meeting attendees. ▪ For a training, enter the names of the agents who want to be trained in the **Trainees** field. ▪ For a time-off request, enter the names of the agents in the **Agents** field. In the **Attendees** field, start typing the name of each of the attendees for the meeting and se lect the name. **iii.** In the **Start date** field, click the calendar icon and select the date you want to start the meet ing and click **OK**. **iv.** In the **End date** field, click the calendar icon and select the date you want to end the meet ing and click **OK**. **v.** If the meeting spans for the whole day, click the **All Day** slider. **vi.** In the **Description** field, enter a description for the meeting.
Create a work shift	**a.** Click **Work**. **b.** In the **Attendees** field, start typing the name of each of the attendees for the meeting and select the name. **c.** In the **Start date** field, click the calendar icon and select the date you want to start the meeting and click **OK**.

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To	Do this
	d. In the **End date** field, click the calendar icon and select the date you want to end the meeting and click **OK**. **e.** Click the **Select Shift** field and select a shift.

6. Click **Save**.

Swap your agents' shifts in Workforce Optimization for HR

Swap an agent's shift in your assignment group with another agent who can work on that shift and skip the approval process.

Before you begin
Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. In the **Team Calendar** tab, navigate and point to the shift for the agent that you want to swap with another agent.
4. In the shift pop-up window, click the Shift Swap icon (↑↓).
5. In the **Requested Shift** section, click the **Agent** field and select the agent who can work on that shift.
6. Click **Submit**.
   The team calendar displays the updated schedule.

Coaching in Workforce Optimization for HR

Use Coaching in Workforce Optimization for HR to assess your team's abilities to efficiently resolve cases by reviewing their work at critical moments.

With Coaching, you can do the following:

- Recommend training for your agents to address skill gaps.
- Use the coaching opportunities that are available to coach your agents. You can also create a coaching opportunity using the Coaching application specific to your agent needs.
- Use assessments and surveys to apply consistent, measurable scores across teams.
- Use Predictive Intelligence to recommend skills for your agents and provide training to address those skill gaps.

Skills Overview in Workforce Optimization for HR

Use Skills Overview to analyze skill data such as how many skills are assigned to users and tasks. You can also see how many experts you have for a particular skill and the overall skill coverage by your teams.

Access Skills Overview from the Teams application:

1. Go to **Workspaces** > **Manager Workspace**.
2. Click the teams icon.

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3. Select a team.
4. Click the **Skills** tab.
5. Select a skill.

You can access the Skills Overview page when you click on a skill in a user profile page in any Workforce Optimization for HR application.

Use cases

Use cases

User	Landing page use
Skill Admin [skill_admin]	• Analyze all experts available for each skill. • Drill down into the skill hierarchy. • Number of skills assigned to users and tasks. • The mean time taken to resolve incidents for that skill. • Visualize how many users you have at different skill levels.

Indicators

MTTR of incidents of skill - Mean time taken to resolve incidents with this skill.

Breakdowns

The indicator is broken down by Skill.

Components

Components

Component Name	Type	Description
Skill Overview Container [sn-manager-skill-overview-container]	Visualization components	Contains the following components: • Reports • Mean Time to Resolution (MTTR) indicator • Skill Coverage pie chart • Content tree • Skill Experts components
Skill Tree Connected [sn-manager-skill-tree-connected]	Tree	Displays the skill hierarchy. If the selected skill does not have a skill hierarchy then the component will not display on the Skill Overview page.
Skill Experts [sn-manager-skill-experts-connected]	List	Displays all users who are at the expert level for the skill.

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Components (continued)

Component Name	Type	Description
Skill Coverage [now-uxf-visualization-connected]	Pie-chart	Displays the percentage as well as the number of users with different levels of expertise for the skill.

Reports

Important: The Pending Users and Assigned Tasks reports display when you enable the Coaching with Learning application from the ServiceNow® Store. To enable this application, see Activate Workforce Optimization for HR.

Reports

Title	Type	Source table	Description
Assigned Users	Single score	User Skill [sys_user_has_skill]	The number of users who have the selected skill assigned to them.
Assigned Tasks	Single score	Task Skill [task_m2m_skill]	The number of tasks for which this skill has been assigned.
Pending Users	Single score	Pending Users [sn_lc_learning_task]	The numbers of users who are yet to be assigned the selected skill from the learning task.
Course Items	Single score	Learning Course Item [sn_lc_course_item]	The number of internal and external courses that have the skill associated with the course item.

Learning in Workforce Optimization for HR

Use Coaching with Learning to train your agents with internal and external learning content. Organize similar content into learning libraries. Assign learning tasks to your agents and track completion. Create learning paths that include a collection of courses on a specific topic associated with a set of skills.

Create a course catalog in Workforce Optimization for HR

Create course catalogs and set user criteria to define user access to the course items and learning paths associated with it.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Coaching icon.
3. Select the **Learning** tab.

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4. Go to **Learning course catalogs** > **All course catalogs**.
5. Select **New**.
6. Create a course catalog.
   For more information, see Create a course catalog.

Create a learning library in Workforce Optimization for HR

Create a learning library to organize related content into categories.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Manager Workspace**.
2. Select the coaching icon.
3. Select the **Learning** tab.
4. Select **Learning Libraries** and select **My learning libraries**.
5. Create a learning library.
   a. Select **New**.
   b. In the **Title** field, enter a unique name for the learning library.
   c. In the **Description** field, enter a description for the learning library.
   d. Select **Save**.

   Note: The learning library is visible to all groups that you directly or additionally manage.

6. Add learning courses to learning libraries.
   a. Select the **Content** tab.
   b. Select **Add**.
   c. In the **Add Learning Courses** pop-up window, select all course items you want to add to the learning library.
   d. Select **Add**. The course items are added to the learning library.

   Note: To remove any course item you have added, select the course item and Select **Remove**.

7. Add a group to a learning library.
   a. Select the **Applicable Groups** tab.
   b. Select **New**.
   c. In the **Group** field, select a group that you want to associate with the learning library.
   d. Select **Save**.

Create internal learning in Workforce Optimization for HR

Add internal courses so that agents can learn new content and enhance their skill set.

Before you begin

Role required: sn_hr_wfo.admin

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Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Manager Workspace**.
2. Select the coaching icon.
3. Select **Learning Courses** and select **Internal Courses**.
   You can search courses based on keywords using the **Search courses** field or narrow down the display of the courses based on skills using the **Filter courses by skill** field.
4. Create an internal learning course.
   a. Select **New**. The **Learning Internal Content** screen appears.
   b. Fill in the following fields.

Learning internal content form

Name	Description
Title	Name of the course.
Internal source	Select the type of content for the course. Here are the available types of courses: ▪ URL—Youtube, Vimeo, or any link for a video ▪ Knowledge article ▪ Free form
Days to complete	The number of days required to complete the course. Default value is set to 5.
Course catalog	The catalog associated with the course.
Knowledge article	If the internal source is a knowledge article, select the article.
URL Domain	If the internal source is URL, select the domain for the URL. Here are the available URL domain types: ▪ Youtube ▪ Vimeo ▪ Other
URL	If the internal source is URL, enter the URL for the selected domain.
Estimated duration	Length of time when the course has to be completed. For example, for a video, it is the duration of the video. For a KB article, the duration is estimated based on the length of the article.

5. Click **Save**.
6. Add a skill to the internal content.
   a. Select the **Associated skills** tab.
   b. Select **New**.
   c. In the **Skill** field, select a skill you want to associate with the internal content.
   d. In the **Skill level** field, select a skill level for the selected skill.
   e. Select **Save**.

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7. Add a learning task to the internal content.
   a. Select the **Learning Tasks** tab.
   b. Select **New**.
   c. In the **Assigned to** field, choose a trainee to whom you want to assign the learning task.
   d. In the **Course item** field, select the course item to associate with the learning task.
   e. In the **Due date** field, select the calendar icon and select the date and time when you want to trainee to complete the learning task.
   f. Click **Save**.

Access external courses on Workforce Optimization for HR

Add courses from external sources such as Udemy, Pluralsight, or Cornerstone to enable your users to gain skills from external content.

Before you begin
Role required: sn_hr_wfo.admin

Procedure
1. Navigate to **All** > **Workforce Optimization for HR** > **Manager Workspace**.
2. Click the coaching icon.
3. Click the **Learning** tab.
4. Go to **Learning Courses** > **External Courses**.
   You can search courses based on keywords using the **Search courses** field or narrow down the display of the courses based on skills using the **Filter courses by skill** field.
5. Select a course.
6. Click **Go to course**.
   You can review and learn the external course.

Assign a course item to agents

Assign a course item to one or more agents and add a due date for them to complete the course.

Before you begin
Role required: sn_hr_wfo.admin

About this task
You can analyze the course items that were most taken by your team members. You can also see which courses were created in the last five days.

Note: You can close the status of a course item for any of your team members that you directly or additionally manage by selecting **Mark as complete** for that course item.

Procedure
1. Navigate to **All** > **Workforce Optimization for HR** > **Manager Workspace**.
2. Select the coaching icon ().
3. Select the **Learning** tab.
4. Select **Learning Courses** > **All Courses**.

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- You can search courses based on keywords using the **Search courses** field or narrow down the display of the courses based on skills using the **Filter courses by skill** field.
- In the course item cards, you can view details of each course, including skills associated with the course. If a course has more than one skill, you can select the count next to a skill and view all skills. To remove a skill, select a skill and select **Remove**.
- You can close the status of a course item for any of your team members that you directly or additionally manage and by selecting **Mark as complete** for that course item.

5. Select the assign icon for the course item you want to assign to agents.
6. In the **Assign learning course** screen, assign the learning course to groups or team members.

To	Do this
Assign the course to all groups that you directly and additionally manage	Select **To my groups**.
Assign the course to specific groups or team members	**a.** Select **To specific groups or team members**. **b.** In the **Group assignment** field, select one or more groups to which the agents you want to assign this course to belong. **c.** In the **Team member assignment** field, select one or more team members to which you want to assign the course.

   a. If the agents have to complete the course item within a given date, select the **Mandatory** check box.

   b. In the **Due date** field, select the date by which they need to complete it.

   c. Select **Assign**.

Note:

- The course that is most taken by your agents is identified with the **Most taken** highlight.
- The course that has been created less than five days before the current date is identified with the **New** highlight.

Create a learning path in Workforce Optimization for HR

Create a learning path, add relevant skills and course items, and publish the path. When your agents complete the path, any skills associated with the path are automatically added to the agent's profile.

Before you begin

Role required: sn_hr_wfo.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Coaching icon.
3. Select the **Learning** tab.

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4. Navigate to **Learning Paths** > **All learning paths**.
   - You can search a path based on keywords using the **Search** field or narrow down the display of the paths based on skills using the **Filter by skill** field.
   - You can select a learning path to view the details. You can analyze the path objective, the skills associated with the course items, the total number courses in the path, and the duration to complete them.
   - You can select the link that displays the skills and view all skills associated with the learning path. The list of skills will display if there are more than 5 skills associated with the learning path.
5. Select **Create new path**.
   The **New learning path** screen displays.
6. On the form, fill in the fields:

Learning path form

Field	Description
Path name	Unique name for the learning path.
Course catalog	Catalog to which you want to associate the learning path
Objective	Objective of the learning path.
Short description	Brief description of the learning path.
Description	In-depth description of the learning path.

7. Click **Next**
   The learning path that is created is in **Draft** state. You can choose to complete it later.
8. Add or remove course items.
   - You can search courses based on keywords using the **Search** field or narrow down the display of the courses based on skills using the **Filter by skill** field.
   - You can select a course and preview the details.

   a. Enable or disable the check box for the course items that you want to add or remove from the learning path.

   b. Select **Add items**.
   The **Review** screen appears.
9. Review the learning path.
   The skills associated with the selected courses are automatically populated in the **Course skills** field.

   a. Review and edit any required details.
   You can also add additional skills to the learning path.

   b. **Optional:** To remove items that you no longer want to associate with the learning path, select the item and then select **Remove selected items**.

   c. Click **Next**.

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- The screen displays the agent view of the learning path.
- The **Curriculum** section displays the course items in the order that you have selected in the **Review** screen.
- If you do not want to publish the learning path, you can select **Save** and come back to it later.

10. Click **Submit** to publish the learning path.
    The learning path is published based on the Publish flow.

Assign a learning path to agents

Assign a learning path to one or more agents and add a due date for them to complete the path.

Before you begin

Role required: sn_hr_wfo.admin

About this task

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Manager Workspace**.
2. Select the coaching icon ().
3. Select the **Learning** tab.
4. Select **Learning paths** > **All learning paths**.
   - You can search paths based on keywords using the **Search** field or narrow down the display of the paths based on skills using the **Filter by skill** field.
   - Each path displays a highlight that shows whether it is in draft or published state. You can select a path that is **Draft** state and complete it. You can select a path that is in **Published** state and view the path details.
5. Select the Assign icon for the path you want to assign to agents.
   The Assign icon is only available when the path is in **Published** state.
6. In the **Assign learning path** window, assign the learning path to groups or team members.

To	Do this
Assign the path to all groups that you directly and additionally manage	Select **To my groups**.
Assign the path to specific groups or team members	**a.** Select **To specific groups or team members**. **b.** In the **Group assignment** field, select one or more groups to which the agents you want to assign this path to belong. **c.** In the **Team member assignment** field, select one or more team members to which you want to assign the path.

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a. If the agents have to complete the path within a given date, select the **Mandatory** check box.

b. In the **Due date** field, select the date by which they need to complete the path.

c. Click **Assign**.

You can see the progress your agents have made as they work on a path.

Create a learning task

Create learning tasks for agents to keep track of their learning activities.

Before you begin

Role required: sn_hr_wfo.admin

About this task

Set learning task completion due dates to include or exclude weekends using the *exclude_weekends_on_learning_task_due_date* system property.

Procedure

1. Navigate to **All** > **Workforce Optimization for HR** > **Manager Workspace**.
2. Click the coaching icon.
3. Click the **Learning** tab.
4. Click **Learning Tasks** and select **All Tasks**.
5. Create a learning task.

   a. Click **New**.

   b. On the form, fill in the fields:

   Learning task form

Name	Description
Assigned to	Name of the agent to whom you want to assign the learning task.
Learning library	The learning library that contains the course item for the learning task.
Course item	The course that needs to be completed by the agent.
Due date	Date when the agent must complete the course. Default is 5 days after the creation of the learning task. This value is calculated from the **Days to Complete** field for the course item. For learning tasks that are assigned or in progress, the due date field is highlighted as follows: ▪ Green—if the task is due after the current day. ▪ Yellow—if the task is due on the current day. ▪ Red—if the task was due before the current day.

6. Click **Save**.

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Workforce Optimization for HR reference

Workforce Optimization for HR reference includes information about the roles, system properties, and tables installed.

Components installed with Workforce Optimization for HR

Several types of components are installed with activation of Workforce Optimization for HR application, including user roles, key performance indicators (kpis), scheduled jobs, properties, and tables.

Workforce Optimization for HR

Roles

Role title [name]	Description	Contains roles
Workforce Optimization User [sn_hr-wfo.user]	Typically uses Workforce Optmization for HR.	sn_hr-wfo.user
Workforce Optimization Admin [sn_hr_wfo.admin]	Grants administrative rights to create, read, update, and delete (CRUD) additional managers.	sn_hr_wfo.admin
Workforce Optimization HR Manager [sn_hr_wfo.manager]	Grants rights to create, read, or update, coaching, scheduling, teams, or channel management applications.	sn_hr_wfo.manager

Properties

Properties	Description
sn_hr_wfo.hr_group_types	System property that ensures the right HR related lists are rendered on the records in team performance module. The logged in user should belong to a group of the group types (sysId) specified in this property.

Filter Configuration

Module Name	Module Tables/Database View
Manager Workspace	Stores filter configurations for all applications such as, Schedule, and Coaching. [sn_mgr_workspace_filter_configuration]
Schedule	• User [sys_user] • User Skill [sys_user_has_skill] • Agent Schedule [sys_shift_planning_agent_schedule]

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Filter Configuration (continued)

Module Name	Module Tables/Database View
	• Schedule Event [sn_shift_planning_event] • Manager Groups database view [sn_wfo_manager_group]
Coaching	• Skill [cmn_skill] • Skill Category M2M [cmn_skill_m2m_category] • Group Member [sys_user_grmember]

Manager Workspace

Roles

Role title [name]	Description	Contains roles
Manager Workspace User [sn_mgr_workspace.user]	Grants read access to home and list modules.	workspace_user
Manager Workspace Manager [sn_mgr_workspace.manager]	Grants read access to primary group, additional managers, and the approval button.	• sn_mgr_workspace.user • sn_wfo.user
Manager Workspace Admin [sn_mgr_workspace.admin]	Grants administrative rights to create, read, update, and delete (CRUD) all applications and settings in Manager Workspace.	• sn_mgr_workspace.manager • workspace_admin • ui_builder_admin

Properties

Properties	Description
cnm_skills.ws_max_users_swap_skill_matrix	The maximum limit for the number of users that allows you to swap axes in the skill matrix. • **Type:**Integer • **Default value:**50

Performance Analytics Indicators

Indicator Name	Description
No. of cases resolved	Number cases resolved the first time it was handled.
No. of cases not updated in last 30 days	Number of cases that are not updated since 30 days.
No. of resolved cases reopened	Number of cases reopened because issues were not addressed properly.

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Performance Analytics Indicators (continued)

Indicator Name	Description
No. of escalated open cases	Number of cases that are not worked on and are escalated.

Scheduled jobs

Scheduled job	Description
Daily Data Collection	Runs the job daily and collects data for all teams indicators.
Historic Data Collection	Runs the job and collects historic data for all teams indicators.
Weekly Data Collection	Runs the job weekly and collects data for all indicators in Manager Workspace.

Scheduling

Roles

Role title [name]	Description	Contains roles
Shift Planning User [sn_shift_planning.user]	Grants read access for scheduling including the ability to view schedules and shifts.	
Shift Planning Agent [sn_shift_planning.agent]	Grants agents access to their calendar and request shift swap or time-off.	sn_shift_planning.user
Shift Planning Admin [sn_shift_planning.admin]	Grants administrative access to create, read, update, and delete (CRUD) schedules and work shifts.	• sn_shift_planning.approver • sn_shift_planning.user • sn_shift_planning.agent

Tables

Table	Description
sn_shift_planning_time_worked_summary	Stores the time worked summary of an agent.
sn_shift_planning_agent_time_work	Stores the agent's time worked, such as clock-in and clock-out timings. If an agent logs in early or logs out late, then the shift start and shift end times are stored in place of clock-in and clock-out timings.
sn_shift_planning_agent_time_attendance	Stores the clock-in and clock-out timings of agents. Data is retrieved when an agent logs in, logs out or changes the presence state.

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Properties

Property	Description
sn_shift_planning.number_of_days_to_cache	Number of days to cache agent schedules. • **Type:** Integer • **Default value:** 5
sn_shift_planning.enable_schedule_adherence	Calculates and displays schedule adherence information for your agents. • **Type:** Boolean • **Default value:**True
sn_shift_planning.early_clockin_threshold	Threshold settings indicate how many minutes early or late an agent can clock-in or clock-out to the scheduled time without being considered non-adherent. This is the acceptable duration of time flexibility for an agent to start work before the scheduled start time. • **Type:** Integer • **Default value:**60 min
sn_shift_planning.adherence_threshold	Set the percentage for a threshold in adherence. The agents who do not qualify to be above the defined threshold value (70%) are considered non-adherent agents. • **Type:** Integer • **Default value:**70%
sn_shift_planning.conformance_lower_threshold	Set the lower threshold percentage for flexibility in conformance. The agents who do not qualify for the defined lower and upper conformance threshold values (80-120) are considered non-conformance agents. • **Type:** Integer • **Default value:**80%
sn_shift_planning.conformance_upper_threshold	Set the upper threshold percentage for flexibility in conformance. The agents who do not qualify for the defined lower and upper conformance threshold values (80-120) are considered non-conformance agents. • **Type:** Integer • **Default value:**120%
sn_shift_planning.auto_clockout_threshold	Threshold time for the system to wait and generate automatic clock-out events when agents forgets to

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Properties (continued)

Property	Description
	clock-out. For example, if an agent's planned work shift is 8 AM to 5 PM and fails to clock out at 5 PM, the system waits for 60 min as threshold time and generates an automatic clock-out event. • **Type:** Integer • **Default value:**60 min

Scheduled Jobs

Name	Description
Shift Planning - Delete All Agent Schedules Cache	Deletes cache from the sn_shift_planning_agent_availability table. • Runs automatically everyday at 2:30 am • Run this job on-demand when you import data.
Clock-out event generation (For scenarios where clock-out event does not get triggered)	Generates clock-out events every 4 hours if agents haven't clocked-out. **Note:** Consider an agent's work shift timings are from 8 AM to 5 PM and *sn_shift_planning.auto_clockout_threshold* property value is set to 60 minutes. The agent clocks-in and fails to clock out, the scheduled job waits till 6 PM(5 PM+60 minutes) and if there is no clock out till 6 PM, the system generates a clock-out event with agent's shift end time.
Populate Agent Time Worked Summary	Runs daily to calculate the time worked, adherence and conformance based on agent's planned and actual work shift timings of the previous day. The values are stored in [sn_shift_planning_time_worked_summary] table.
Update Wrapper End Time for Actual Work Events	Runs daily to make sure the actual work wrapper end-time is equal to last clock-out time.
[Schedule Adherence] Daily Data Collection	Runs the job daily and collects data for all teams indicators.
[Schedule Adherence] Historic Data Collection	Runs the job and collects historic data for all teams indicators.
[Schedule Adherence] Weekly Data Collection	Runs the job weekly and collects data for all indicators in Manager Workspace.

Setting the due date for time-off and shift-swap request approvals: Administrators can configure the due date logic for the Time Off Request and Shift Swap Request approval flows. The approval due date is set as the number of days before the request start date. The default is

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set to two days which means if the approval is not approved two days before the request start date, it will be auto-rejected. For information on configuring flows, refer to Build your first flow in Flow Designer.

Demand Forecast

Forecast configurations

Name	Description
Cases Assigned	Collects data for cases.
Chat Interactions Created	Collects data for chat interactions.

The **WFO Forecast** time series metric retention policy is available by default for all forecast configurations. By default, this retention policy stores data at a 15min interval for the past three years for all zboot customers.

Resource conversion formula

Name	Formula to create this resource forecast configuration
Resources for Sales Support	`([FC:Chat Interactions Created] * [FP:Average Chat Work Time - Sales Support]`
Resources for Service Support	`([FC:Cases Assigned]*[FP:Average Case Work Time - Service Support]) + ([FC:Chat Interactions Created]*[FP:Average Chat Work Time -Service Support])`
Resources for Tech Support	`([FC:Cases Assigned]*[FP:Average Case Work Time - Tech support])+([FC:Chat Interactions Created]*[FP:Average Chat Work Time -Tech Support])`

Forecast Parameters

Name	Description
Service Support: Average Case Work Time	Average time a service support agent worked on a case. Time is measured in hours. The default value is 0.5.
Service Support: Average Chat Work Time	Average chat duration a service support agent had for each interaction. Time is measured in hours. The default value is 0.25.
Tech Support: Average Case Work Time	Average time a tech support agent worked on a case. Time is measured in hours. The default value is 1.
Tech Support: Average Chat Work Time	Average chat duration a tech support agent had for each interaction. Time is measured in hours. The default value is 0.5.
Sales Support: Average Chat Work Time	Average chat duration a sales support agent had for each interaction. Time is measured in hours. The default value is 0.5.

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If you create forecast parameters for a forecast configuration, the values set in the configuration are used instead of the default forecast parameters listed in the forecast properties section. For information on configuring forecast parameters, see Modify forecast parameters to visualize forecast data.

Forecast Properties

Name	Description
sn_agent_forecast.forecast_interval	The smallest interval (in minutes) at which historical data is collected and forecasts are generated. Valid values are 15 and 60.
sn_agent_forecast.number_of_historical_days_in_timeseries_chart	The number of historical days that will be plotted in time series chart in Manager Workspace.

Roles for Demand Forecast

Role title [name]	Description	Contains roles
Forecast admin [sn_agent_forecast.admin]	Grants administrative rights to create, read, update, and delete (CRUD) forecast configuration tables.	• sn_agent_forecast.users • clotho_admin
Forecast user [sn_agent_forecast.user]	Grants read access to forecast configuration tables.	

Tables for Demand Forecast

Table	Description
Forecast Configuration [sn_agent_forecast_configuration]	Define data collection definition and resource conversion formula configurations.
Forecast Parameter [sn_agent_forecast_parameter]	Define forecast parameters required for the formula.
Forecast Configuration group [sn_agent_forecast_configuration_m2m_sys_user_group]	Associate resource conversion formula with assignment groups.

By default, forecast configurations are available for the following groups:

- Sales Support
- Service Support
- Tech Support

Schedule jobs for Demand Forecast

Name	Description
Collect daily data for demand forecast data collection definitions	Runs daily at 2 am. For any table defined in the Data Collection Definition configuration, it counts the number

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Schedule jobs for Demand Forecast (continued)

Name	Description
	of records from the previous day for each hour for every group and stores it in the MetricBase.
Forecast resources for future	Runs daily at 3 am. Calculates the forecast resources for the future based on the collected data and stores the data in the Agent Forecast metric in MetricBase.
Create cases and chats for previous day	Daily job that creates demo cases and chats for previous day.
Delete case demo data	Deletes cases older than 90 days. Not enabled by default.
Delete interaction demo data	Deletes chats older than 90 days. Not enabled by default.

On Demand jobs for Demand Forecast

Collect historical data for demand forecast data collection definitions	Runs on demand. Collects historical data daily for every hour for the past three years for automated forecast configuration.
Generate forecasting demo data	Runs on demand. Collects data for data collection definitions for past 90 days. Runs Forecast resources for future jobs to generate volume forecasts and staffing plan for next 30 days. Activates Create cases and chats for previous day job to create cases and chats.

Teams

Roles

Role title [name]	Description	Contains roles
Teams User [sn_team_perf.team_performance_user]	Grants access to read KPI data.	• sn_wfo.user • pa_analyst
Teams Admin [sn_team_perf.team_performance_admin]	Grants access to create and configure KPIs, KPI groups, and assignment groups in the Teams module.	• sn_wfo.admin • sn_team_perf.team_performance_user

Properties

Property	Description
sn_team_perf.kpi_group.max_parent_kpis	The maximum number of parent indicators that you can add to one KPI group.

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Properties (continued)

Property	Description
	• **Type:**Integer • **Default value:**5
sn_team_perf.kpi_group.max_supporting_kpis	The maximum number of supporting KPIs you can define for a parent KPI. • **Type:**Integer • **Default value:**10
sn_team_perf.ws.max_assignment_groups	The maximum number of assignment groups prioritized by order number to display on the Teams application in Manager Workspace. • **Type:**Integer • **Default value:**15
sn_team_perf.default_date_range	The default date range set in the date range picker. • **Type:**Integer • **Default value:**30

Coaching

Roles

Role title [name]	Description	Contains roles
Coaching Admin [sn_coaching.admin]	Grants administrative rights to create, read, update, and delete (CRUD) coaching opportunities, assessments, training, and skills.	• sn_coaching.coach • sn_lc.learning_admin
Coaching Coach [sn_coaching.coach]	Grants administrative rights to create, read, or update coaching opportunities, assessments, training, and skills.	• sn_coaching.trainee • pa_viewer • sn_lc.catalog_manager
Coaching Trainee [sn_coaching.trainee]	Grants access to add training, assessments, and skill records.	• skill_user • pa_viewer • survey_reader

Important: This feature is available with the Workforce Optimization for HR from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

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Business rule

Business rule	Table	Description
Calculate coaching survey score	Assessment Instance [asmt_assessement_instance]	Sets the feedback rating based on the survey score.

Coaching opportunities

Coaching Opportunity Name	Description	Table
Coaching Opportunity for SLA Breach	Coaching opportunity for the agents who worked on the critical and high priority cases that breached SLA.	Task SLA [task_sla]
Coaching Opportunity for low CSAT	Coaching Opportunity for the agents who worked on cases that has a customer satisfaction score less than 4.	Case Report [sn_customerservice_case_report]
Coaching Opportunity for skills award verification	Coaching Opportunity for verification of skills awarded to agents.	Case [sn_customerservice_case]
Knowledge Management Process: Coaching on quality of knowledge articles	Coaching Opportunity for the agents who need to improve the quality of a knowledge article by reviewing the assessment.	Case [sn_customerservice_case]
Coaching Opportunity for high TTR	Coaching Opportunity for the agents who worked on a case that had time to resolution more than 3 days.	Case Report [sn_customerservice_case_report]
Interaction: Coaching Opportunity for Handling Time	Coaching Opportunity for the agents who worked had handle time more than 10 mins on an interaction.	Interaction [interaction]

Note: You can customise the coaching opportunities for low CSAT, high TTR, SLA breach, and handling time based on your business needs.

Important: This feature is available with the Workforce Optimization for HR from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Coaching Surveys

Name	Description
Chat Quality Survey	Survey associated with the Chat Interaction coaching opportunity. The coach assess the agent using this survey after the agent completes a chat interaction.

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Coaching Surveys (continued)

Name	Description
Case Quality Survey	Survey associated with the Case Interaction coaching opportunity. The coach assess the agent using this survey after the agent completes a case interaction.

Properties

Property	Description
sn_coaching.learning_default_duration	Number of days to read the knowledge article or complete training. The admin (sn_wfo.admin) sets the number of days for the trainee to complete reading the article or complete the training. The number of days is converted to the due date for the trainee to complete the training. It is calculated from the current date taking the trainee's time zone into consideration. • **Type:**Integer • **Default value:**5
sn_coaching.exclude_weekends_on_training_due_date	Excludes weekends when the due date is set for trainees to complete training. • **Type:**true | false • **Default value:**true

Coaching with Learning

Important: This feature is available with the Workforce Optimization for HR from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Roles

Role title [name]	Description	Contains Roles
Learning admin [sn_lc.learning_admin]	Grants administrative rights to create, read, update, and delete (CRUD) catalog, learning content, roles, and configure learning source.	• sn_lc.catalog_manager • sn_hr.integr_fw.admin
Learning catalog manager [sn_lc.catalog_manager]	Grants administrative rights to create, read, or update learning catalogs.	• sn_lc.task_creator • sn_lc.content_writer

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Roles (continued)

Role title [name]	Description	Contains Roles
Learning catalog group manager [sn_lc.catalog_group_manager]	Grants administrative rights to create, read, or update learning catalogs based on groups.	• sn_lc.task_creator • sn_lc.content_writer
Learning content creator [sn_lc.content_creator]	Grants administrative rights to create, read, or update internal courses.	sn_lc.content_reader
Learning content writer [sn_lc.content_writer]	Grants read or write access for learning courses.	sn_lc.content_creator
Learning content reader [sn_lc.content_reader]	Grants read access for learning courses.	sn_lc.content_reader
Learning content advisor [sn_lc.learning_advisor]	Can assign learning tasks.	sn_lc.learning_advisor
Learning task creator [sn_lc.task_creator]	Grants read or write access for learning tasks.	sn_lc.task_creator

Tables

Table	Description
Learning External Content [sn_lc_external_content]	Stores details of external course items that are pulled from third-party systems.
Learning User Course Activity [sn_lc_user_course_activity]	Stores details of learning course activities such as user to whom the course is assigned, status, due date, and name of the learning course.
Learning Content [sn_lc_content]	Stores details of internal learning content such as knowledge articles, videos that are created in ServiceNow.
Learning Course Item [sn_lc_course_item]	Stores details of learning course items, such as the source to which the learning course belongs.
Learning Catalog [sn_lc_catalog]	Stores details of learning catalog items with its course items.
Learning Task [sn_lc_learning_task]	Stores details of learning tasks, such as user to whom the learning task assigned, and due date by when the learning task must be completed.
Learning System Configuration [sn_lc_learning_system_configuration]	Stores configuration parameters of sources (third-party learning management systems).

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Properties

Property	Description
glide.ui.sn_coaching_assessment_activity.fields	Edit coaching assessment activities. • **Type:** string • **Default value:** assigned_to,cmdb_ci,state,impact,priority,opened_by,work_notes,comments,*Attachme
sn_coaching.recommended_learning_deprecated	Coaching Recommended Trainings is being deprecated and replaced with the Learning Tasks and course items from Coaching with Learning. • **Type:** string • **Default value:** true
sn_coach.lrn.exclude_weekends_on_learning_task_due_date	Enable property to exclude weekends while setting the due date for learning tasks. • **Type:** true|false • **Default value:** true
sn_coach_lrn.learning_list_array_properties	Data array properties for the now-list-menu component on the Learning Tasks tab, coaching module. • **Type:** string • **Default value:** script for data array
com.glide.transform.json.max partial-length	Transforms JSON objects to internal objects and sets the word limit for records fetched through an API call. • **Type:** integer • **Default value:** 16384 **Note:** You must Add this system property to set the desired value.
com.snc.process_flow.rsp.ctrl.serialized_value_limit	Specify the number of bytes allowed for runtime values in each step in the flow execution details. To prevent truncation, set the value to an integer equal to or less than zero. • **Type:** integer • **Default value:** 16384

Important: This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

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Skill Recommendation

Roles

Role title [name]	Description	Contains roles
Skill Recommendation User [sn_sre.user]	Grants rights to view skill recommendation tables.	wfo.user
Skill Recommendation Admin [sn_sre.admin]	Grants administrative rights to edit the properties for skill recommendation.	• wfo.admin • sn_sre.user

Navigate to **Skill Recommendation** > **Configuration** to configure these properties.

Properties

Property	Description
Enable skill recommendation. sn_sre.enable_skill_recommendation	Enable this property to start recommending skills for agents. • **Type:**true | false • **Default value:**true
Maximum number of skills to predict based on supervised learning. sn_sre.max_supervised_skills	Using supervised learning, the maximum number of skills to predict for each incident ordered by confidence of prediction. • **Type:**Integer • **Default value:**3
Maximum number of skills to predict based on supervised learning. sn_sre.max_unsupervised_skills	Using unsupervised learning, the maximum number of skills to predict for each incident ordered by confidence of prediction. • **Type:**Integer • **Default value:**3
Number of times Predictive Intelligence must predict the same skill for an agent before recommending it for the agent. sn_sre.user_predicted_skill_threshold	The number of times Predictive Intelligence must predict the same skill for an agent before recommending the skill for the agent. • **Type:**Integer • **Default value:**20
Similarity solution definition to recommend skills from similar cases. sn_customerservice.unsupervised_solution_definition_for_cases	Name of the Predictive Intelligence solution definition used for predicting skills to resolve cases using unsupervised learning. If you have created your own solution definition, you can replace the default one with the one you have created.

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Properties (continued)

Property	Description
	• **Type:**String • **Default value:**ml_sn_sn_customerservice_global_recommend_similar_
Similarity solution definition to recommend skills for cases. sn_customerservice.supervised_solution_definition_for_cases	Name of the Predictive Intelligence solution definition used for predicting skills to resolve cases using supervised learning. If you have created your own solution definition, you can replace the default one with the one you have created. • **Type:**String • **Default value:**ml_sn_sn_customerservice_global_recommend_skills_fr

Scheduled job

Scheduled job	Description
Start skill prediction	Runs the job every day at 1 AM on all incidents that were closed the previous day. Recommends the skills used to close the incidents to resolve similar open incidents.

Tables

Table	Description
User Predicted Skill [sn_sre_user_predicted_skill]	• Stores how many times a skill has been predicted for the user. • Skills not recommended in the last 60 days are automatically deleted from this table.
Task Predicted Skill [sn_sre_task_predicted_skill]	• Stores the skills predicted to resolve each type of incident. • Records created over 60 days ago are automatically deleted from this table.

Admin Workspace for Service Providers overview

HR Admin Service Provider is a consolidated view of customers service usage and consumption, which gives service provider admins the opportunity to make data driven decisions.

SP admins can perform the following functions:

- View different aspects of the service consumption such as the number of services consumed per customer and the ticket volume per service.
- View customer details including the number of services and HR users.

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- Access quick links related to daily work tasks such as domain and customer creations, and user management.
- Access quick links for specific domain on the customer details page.

Note: SP Admin (sn_sp_admin_ws.admin) can access workspace and see a consolidated view of the demand and consumption of services offered to customers. This enables data driven decision making and access to portfolio level links.

Admin Workspace for Service Providers gives SP admins a centralized workspace to see a consolidated view of the demands and consumption of services offered to customers using KPIs.

Page overview details

Page	Description
Landing Page	Shows an overview of services, customer cases, customer details, breached SLAs, trends over time and includes customer data, KPIs and portfolio level useful links.
Client Details Page	Shows an overview of cases er service, breached SLAs, trends over time,. and includes client (domain) specific KPIs, contact details and useful links.

Note: If HR service list doesn't show on the client details page , you might need to add read ACL on sn_hr_core_service table for SP admin.

Feature and application details

Feature	Description
Lexicon Taxonomy Name	Admin Workspace for Service Providers (SPs)
Release Vehicle	Store
PRB Management Group	Dev-App-HR
Does it support mobile interface	No
Plugin or scoped app	Scoped app
License requirement	Yes
On-Prem support	Yes
Link to troubleshooting	NA
Link to FAQ	NA
Domain seperation	Yes

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Note: To see the KPIs, trends across all domains in the workspace dashboard for SP admin need to be in global domain.

Troubleshooting details

Item	Description
Application (UI) Issues	If application (UI) issues occur, you can start by checking the builder for SP admin workspace and 2 controllers in the MSP Dashboard and the MSP Client Page.
Data Frequency Changes	Some data visualization components such as KPIs, trends, and indicator scorecards are collecting current month data and some aren't, which might cause some data to change. **Note:** It's recommended that you run indicator jobs at the start of the month and collect data for previous months only, not for the current month.

Existing table details

Table	Description
Domain (domain)	Has all the data about the domain, which is to pull domains and customer data.
Company (core_company)	Has all the data about the company and might have multiple companies associated with it. This pulls all points of contact in domain data.
HR Service (sn_hr_core_service)	Has all the service data and shows services about domains on the client details page.

Note: There is a plugin dependency on Domain Support - Domain Extensions Installer

SP Admin role details

Role	Description
SP Admin (sn_sp_admin_ws.admin)	SP Admins are scoped adminitrators for the application and can access workspace, dashboards, KPIs, indicators and portfolio level useful links.

ACL details

ACLs	Description
Experience (4 ACLs)	• 2 ACLs for read/write for UX page access • 2 ACLs for read/write for UX route access.

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ACL details (continued)

ACLs	Description
SP Admin Read (4 ACLs)	• 1 ACL for sn_hr_core_service • 1 ACL for report_view • 1 ACL for sn_hr_core_case table • 1 ACL for sp_admin role.
Pa Tag Read (2 ACLs)	• 1 ACL for pa_tag and pa_m2m_indicator_tags table • 1 ACL for pa_indicators_breakdowns m2m table.
Execute (1 ACL)	1 ACL for data broker sn_sp_admin_ws.MSPUtil

Note: ACLs are enforced access levels and only SP admins can access the application, workspace, and modules.

UIB Controller details

Page	Description
Service Provider	Primary controller that encapsulates all business logic for MSP dashboard features such as create or update KPI, data and links, which need to be shown on the MSP dashboard.
Service Provider Client	Controller that encapsulates all business logic for MSP dashboard client details page features such as create or update KPI, data and links, which need to be shown on the client details page.

Use Guided Tours in Admin Workspace for Service Providers

Use Guided Tours in Admin Workspace for Service providers to get an overview of the workspace.

Before you begin

Role required: sn_sp_admin_ws.admin

About this task

Guided Tours help train and onboard users within the workspace. Each tour is designed to provide an overview, guide you through a task, or complete a process. If needed, administrators can create more tours. For more information, see Guided Tours.

When you visit a page that has a guided tour for the first time, a welcome screen appears. You can choose to either begin the tour or skip the tour. The tour can be revisited from the Help Center menu.

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Procedure

1. Navigate to **All** > **SP Admin Workspace**.
2. Select the **Show help** icon ( ).
3. **Optional:** Select the **Pin Help Center menu** icon to pin the Help Center side panel on the page.
4. Select **Take a Tour**.
5. Take the necessary action and select **Next** to progress through the tour.
   For ending the tour at any point, you can select **End Tour** in the side panel or select the **Close** button in the pop-up window and confirm to end the tour.
6. Select **Done** after the tour is ended.

HR Success Dashboard indicators

HR Success Dashboard indicators provides service and performance insights to the HR leadership team and process owners. You can measure the performance of the HR implementation using the different KPIs.

Success Dashboard is available for HR Service Delivery and IT Service Management via the following applications:

- HR Success Dashboard indicators
- ITSM Success Dashboard indicators

  For more information on the ITSM dashboard, see ITSM Success Dashboard indicators.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Get started

Explore	Configure
Learn about HR Success Dashboard indicators concepts and features.	Configure environment, tools, and user access.

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Use



Learn how you can use HR Success Dashboard indicators.

Reference



Get details about ITSM Success Dashboard the HR Success Dashboard indicators components such as roles and dependent applications.

Troubleshoot and get help

Contact Customer Service and Support

Explore the HR Success Dashboard indicators

Get an overview of the HR Success Dashboard indicators to understand the different components on the dashboard and how can you use the dashboard for your organization.

The HR team can analyze and understand the key metrics such as, call deflections and self-service to measure the success of the HR implementation. The leadership team can view the following insights:

- The number of times users are able to solve their problems on their own.
- The number of times users are able to submit their requests and issues without the help of tier 1 agents.
- The channels (Knowledge Base articles, Virtual Agent conversations, Catalog submissions) that are contributing to self-solve and call deflection.
- The number of times Predictive Intelligence successfully predicted an HR ticket field that has a downstream impact on the resolution time.
- The formulae and definitions of the data.
- The data trend for month-on-month, quarter-on-quarter, or year-on-year.

Also, process owners can view the records that contribute to these insights, do a deep dive analysis, and drive improvement plans.

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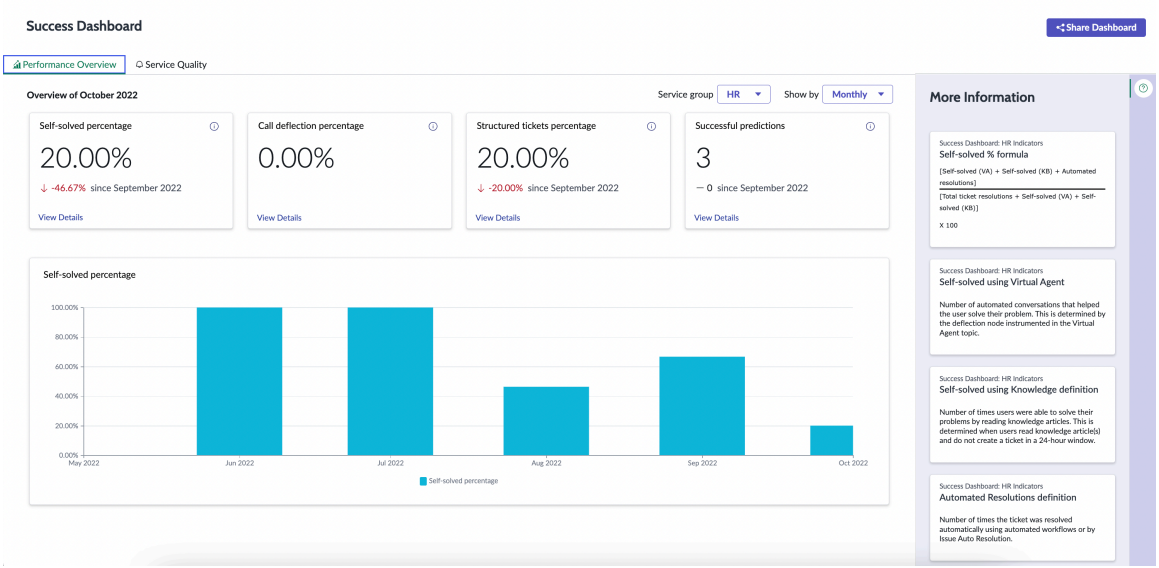
HR Success Dashboard Overview



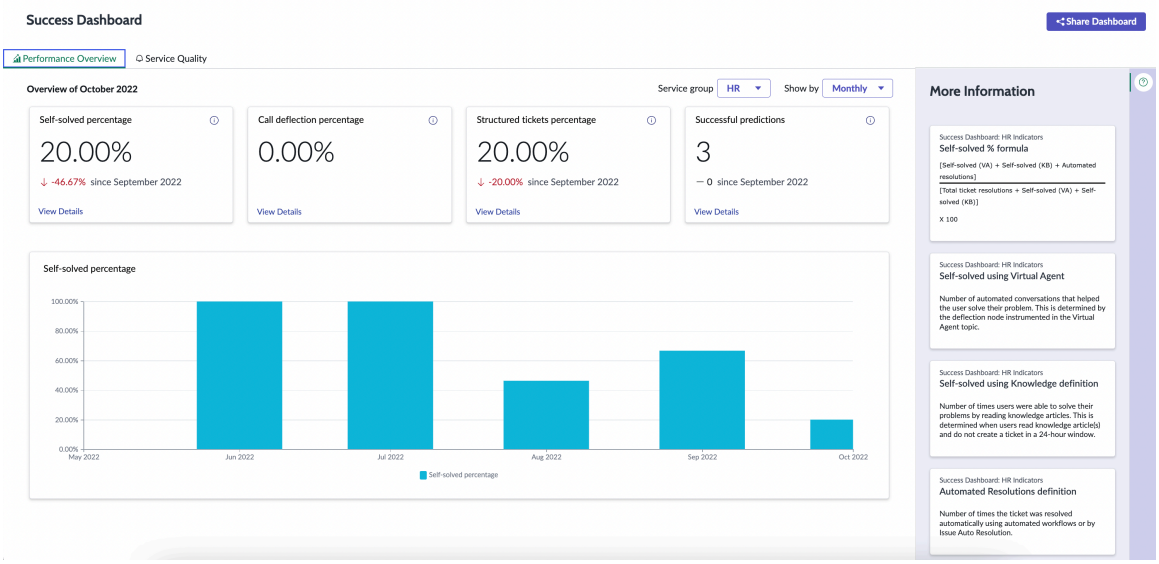
HR Success Dashboard indicators components

Analyze the performance and self-solve data visually and drive business outcomes with the help of the dashboard components.

Performance Overview in HR Success Dashboard indicators

Measure the Key Performance Indicators (KPIs) like Self-solved percentage, Call deflection percentage, Structured tickets percentage, and Successful predictions in the Performance Overview tab. For more information, see HR Success Dashboard indicators KPI definitions and formulae.

HR Success Dashboard indicators Overview



Service Quality in HR Success Dashboard indicators

Measure the Key Performance Indicators (KPIs) like Customer satisfaction score, Mean time to resolve, % Breached SLA, and % First assignment resolution in the Service Quality tab. For more information, see HR Success Dashboard indicators KPI definitions and formulae

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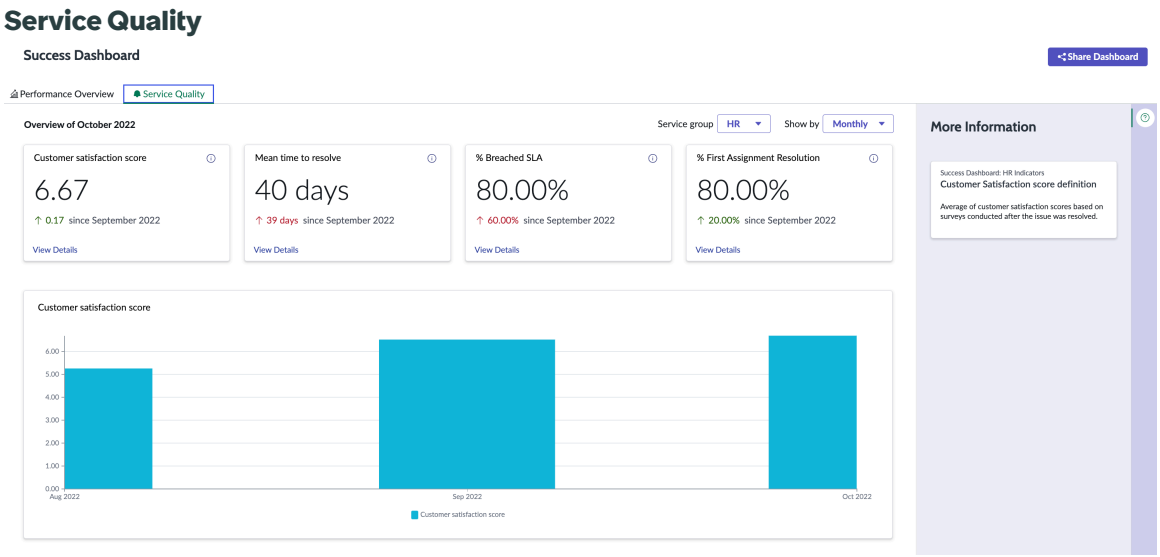


Scorecards in HR Success Dashboard indicators

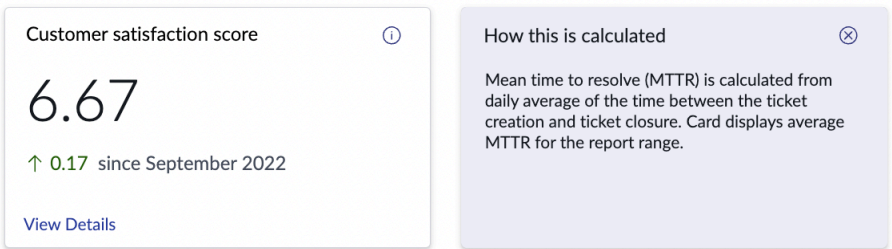
View the aggregation of the daily values for KPIs in the selected period on the scorecards.

- **Current period score**: View the aggregated score for the current time period. Select one of the following options:
  - **Monthly:** View the data aggregated monthly. For counts, this data is the monthly sum of the daily values. For percentages, this data is the monthly average of the daily percentages.
  - **Quarterly:** View the data aggregated quarterly. For counts, this data is the quarterly sum of the daily values. For percentages, this data is the quarterly average of the daily percentages.
  - **Yearly:** View the data aggregated yearly. For counts, this data is the yearly sum of the daily values. For percentages, this data is the yearly average of the daily percentages.
- **Comparison with previous period**: View the percentage change compared to the previous period aggregation. Data is displayed in a month-over-month, quarter-over-quarter, and year-over-year comparison based on the availability of the data.

Info icons in the HR Success Dashboard indicators

View the short description of the indicator and understand how the indicator value is calculated.

Info Icons and cards



Trends in HR Success Dashboard indicators

Select and view the trend of the metric scorecard aggregated scores:

- Call deflection trend
- Structured tickets trend

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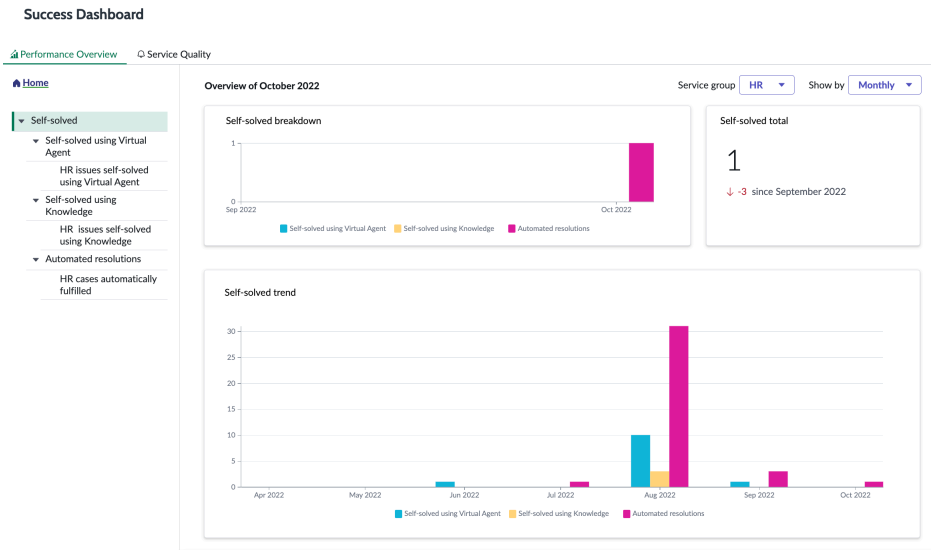
View details in the HR Success Dashboard indicators

See the constituent drill-down views and their contextual descriptions for KPIs. The detailed information can be viewed by selecting **View details**.

- View the primary indicators.

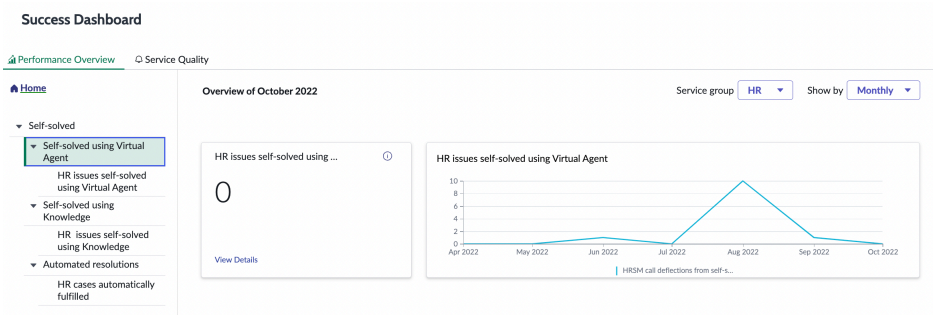
Primary indicators



You can replace or add new indicators to suit your implementation in addition to the base system indicators. For more details, see HR Success Dashboard indicators KPI definitions and formulae.

- View the contributing indicators.

Secondary indicators



You can view a graph of the contributing indicators scores over time along with the KPI value.

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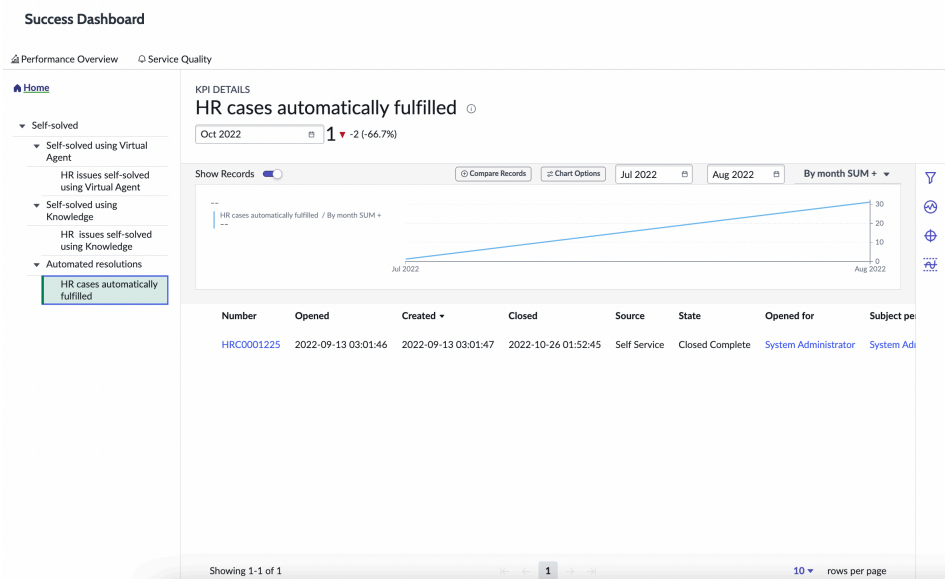
- View the record-level breakdown

Third level breakdown indicators

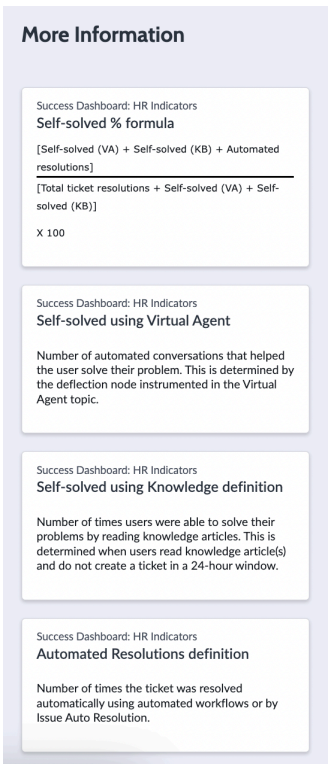


This level drill-down helps you view the record-level details of the indicator when you have the `sn_sd.success_dashboard_details_read` user permissions. See KPI details for more information.

More Information panel in HR Success Dashboard indicators

View the contextual formula, definitions, or any other information about the metric or KPI selected.

More info card



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Configure HR Success Dashboard indicators

Set up the HR Success Dashboard so that IT leadership teams and process owners can start using the dashboard.

Get started with HR Success Dashboard indicators

1. Get the HRSM Pro license for ServiceNow HR Service Delivery applications.
2. Install the HR Success Dashboard indicators application (com.snc.success_dashboard_hrsm).
3. Configure the Knowledge Base for HR Service Delivery.
4. Configure the Virtual Agent topics with VA deflection nodes.
5. Set fulfillment automation level for the HR catalog item.
6. Configure the Key Performance Indicators (KPI)s in the HR Success Dashboard indicators.
7. Run the `UpdateFormulasSD` script to recalculate formulae.
8. Activate Performance Analytics jobs.

Install the HR Success Dashboard indicators

Install the HR Success Dashboard indicators application to get performance and service insights for your organization. The application installs related ServiceNow® Store applications and plugins in case those are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Install the following plugins before installing the HR Success Dashboard indicators application.
  - Performance Analytics - Content Pack for HR
  - Performance Analytics - Premium
  - Self-service Analytics Core
- HR HR Success Dashboard has a dependency on the Success Dashboard Core application. This must be purchased separately.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the HR Success Dashboard indicators application (sn_sd_hrsm) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Configure the Knowledge Base articles

Include the HR only Knowledge Base articles while determining the **Self-solved using Knowledge** KPI in the HR Success Dashboard indicators.

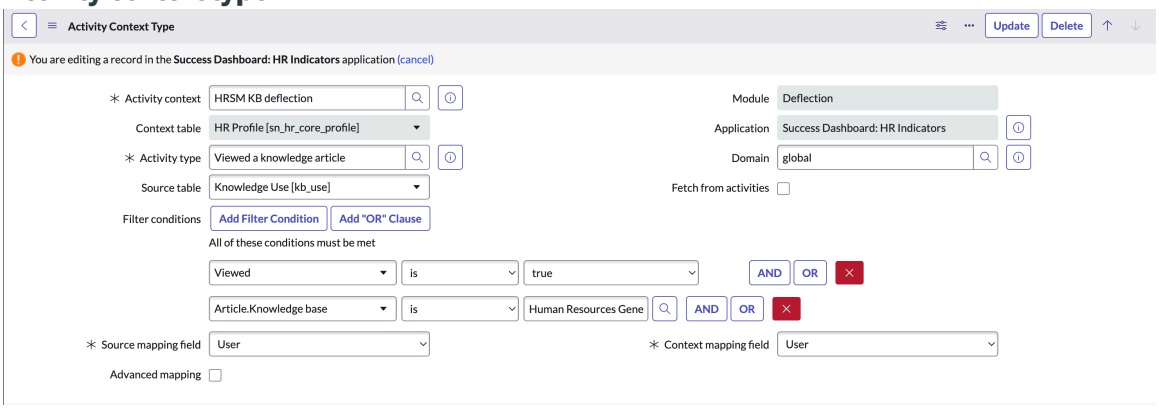
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Self-Service Analytics** > **Activity Context**.
2. Select **HRSM KB deflection** from the list.
3. In the **Activity Context Types** tab, select the Preview icon corresponding to Viewed a knowledge article activity type.
4. Select **Open record**.
5. In the Activity Context Type form, change the filter condition to include the relevant knowledge bases.

Activity context type



6. Select **Update**.

Configure the Virtual Agent topics

Configure the Virtual Agent (VA) topics for HR Success Dashboard indicators to display data correctly in case you have topics other than the base system topics.

Before you begin

Role required: admin

About this task

Map the topics with deflection patterns of the **HR VA Default** deflection tracker. Deflection tracker helps analyse the performance of a conversation and how helpful Virtual Agent topics are for users.

Procedure

1. Navigate to **All > Virtual Agent > Designer**.
2. Select the HR topic for which you want to add the deflection tracker.

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3. Enable the flow chart view by disabling the **Table View** toggle switch.
4. Drag and drop the **Deflection** node from the **Utilities** section to the place in the flowchart where you want to add the deflection pattern.
5. Enter the following details in the Deflection Properties pane on the right.

Deflection input parameters

Field	Value
Deflection Configuration	HR VA Default
Deflection Pattern	**HR VA-Self-Resolving:** When the node in the topic indicates that Virtual Agent is able to resolve the user problem completely without creating an IT ticket (incident or request) and consequently contributing to the Self-solved KPIs.
Activity Table	Table where the deflection activity occurs. This table is associated with the primary activity table. For more information, see Create deflection configurations and patterns.
Activity Ids	List of comma-separated activity system IDs.

6. Select **Save**.

What to do next

Set up the fulfillment automation level of the HR catalog items, see Set fulfillment automation level of catalog item.

You may also configure the dashboard indicators KPIs, add contributing indicators, or update the More information card, as required.

1. For more information on configuring the Success Dashboard indicators KPIs, see Configure Success Dashboard indicators KPIs.
2. For more information on adding contributing indicators, see Add contributing indicators.
3. For more information on updating the More information card, see Update more information cards.

Related topics

Tracking deflections using deflection topic blocks

Create deflection configurations and patterns

Run Update formula script for HR Success Dashboard indicators

Run the update formula script to recalculate all the formulae in the HR Success Dashboard indicators, in case there is outdated data in the dashboard.

Before you begin

Role required: admin

Note: This action is only required for custom changes.

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Procedure

1. Navigate to **All** > **Scheduled Script Executions**.
2. Open the `UpdateFormulasSD` list from the list.
3. Select **Execute Now**.

Activate Performance Analytics jobs

Activate the Performance Analytics (PA) jobs for the HR Success Dashboard indicators to collect daily and historical data.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Performance Analytics > Data Collector > Jobs**.
2. To run the daily jobs:
   a. Filter the list of jobs to select the following:
   [SD HRSM] Daily Data Collection
   b. Activate the scheduled jobs by selecting the **Active** check box corresponding to the job.
3. To run the scheduled jobs for historical data collection:
   a. Filter the list of jobs to select the following:
   [SD HRSM] Historical Data Collection
   b. Select **Execute Now** to see the past 60 days data in the dashboard.

Measure the performance of the HR implementation

Use the HR Success Dashboard indicators to measure the performance of your HR implementation using different KPIs.

For more information on how to share the Dashboard with your leadership, see Share the Success Dashboard indicators.

For more information on how to view the benchmark KPIs of the Success Dashboard indicators, see Success Dashboard indicators benchmark.

Monitor the KPIs of the HR implementation

View and monitor the HR Success Dashboard indicators to measure the performance of your HR implementation using different KPIs.

Access the aggregated KPI data in the HR Success Dashboard indicators. By navigating to **All>** > **Success Dashboard** > **Success Dashboard** if you have the sn_sd.success_dashboard_admin, sn_sd.success_dashboard_read, or sn_sd.success_dashboard_details_read role.

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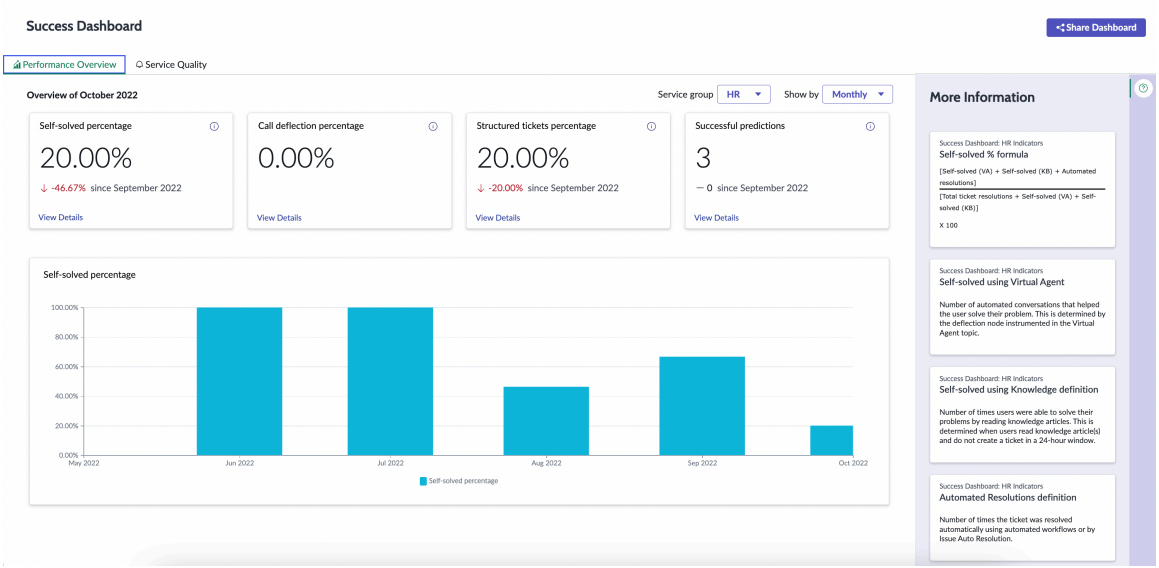
HR Success Dashboard indicators



You can monitor the data in **Monthly**, **Quarterly**, or **Yearly** time aggregations.

- **Monthly**: Shows the data aggregated monthly. For counts, this data is the monthly sum of the daily values. For percentages, this data is the monthly average of the daily percentages.
- **Quarterly**: Shows the data aggregated quarterly. For counts, this data is the quarterly sum of the daily values. For percentages, this data is the quarterly average of the daily percentages.
- **Yearly**: Shows the data aggregated yearly. For counts, this data is the yearly sum of the daily values. For percentages, this data is the yearly average of the daily percentages.

Once the time aggregation is set, all the score-cards show the data for that period.

For more information on the dashboard components, see HR Success Dashboard indicators components.

For more information on the KPI definitions and formulas, see HR Success Dashboard indicators KPI definitions and formulas.

HR Success Dashboard indicators reference

See additional information about components installed with the HR Success Dashboard indicators.

For more information on the roles and responsibilities required to perform different tasks, see User roles and responsibilities.

Note:

The roles are universal for both ITSM and HR, that is all Service groups of the Success Dashboard indicators.

For more information on how to determine the dashboard configuration to use the KPI and formulae, see HR Success Dashboard indicators KPI definitions and formulas.

HR Success Dashboard indicators KPI definitions and formulas

Enable HR Success Dashboard indicators to use the Key Performance Indicators (KPIs) and formulas.

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Performance Overview

HR Success Dashboard indicators uses the following KPIs and definitions:

- **Self-solved:** Calculated from the daily average number of times your users achieved a resolution without intervention from Tier 1 Agents in the report range. Includes numbers from Self-solved using Virtual Agent, Self-solved using Knowledge and Automated resolutions (For example, HR tickets auto-resolution via Virtual Agent). See the formula:

```
[Self-solved using Virtual Agent + Self-solved using Knowledge
 + Automated resolutions] / [Total ticket resolutions +
 Self-solved (VA) + Self-solved (KB)] x 100
```

  - **Self-solved using Virtual Agent:** Number of automated conversations that helped the user solve their problem. In the base system. This is determined by the instrumented deflection node in the VA topic.
    - **HR issues self-solved using Virtual Agent:** Number of times users solved their issues or requests in a Virtual Agent conversation. This is recorded in the deflection metrics table by the **HR VA Self-Resolving** deflection pattern instrumented in the conversation.
    - **Note:** To use a different method to determine this KPI, see Configure Success Dashboard indicators KPIs.
  - **Self-solved using Knowledge:** Number of times users are able to solve their problems by reading Knowledge articles. This is determined when users read Knowledge articles and do not create a ticket in a 24-hour window.
    - **HR issues self-solved using Knowledge:** Number of times users solved their issues or requests on their own by reading Knowledge Base articles. This is determined when the user opened provided article(s) and did not create a case in a 24-hour window. This is recorded in the deflection metrics table with the **HR case deflection using Knowledge** deflection pattern.
    - **Note:** To use a different method to determine this KPI, see Configure Success Dashboard indicators KPIs.
  - **Automated Resolutions definition:** Number of times the ticket is resolved automatically using automated workflows or by Issue Auto Resolution.
    - The Isuue Auto Resolution value is determined by the deflection node configured in the Issue Auto Resolution Virtual Agent topic.
    - The Request Fulfilled Automatically value is the number of requested items that are fulfilled using automated workflows. When the catalog item uses an automated workflow, the **Fulfillment automation level** field of the catalog item must be set to **Fully-automated** for it to be included in this metric.
      - **HR cases automatically fulfilled:** HR cases that are fulfilled using automated workflows. When the catalog item uses an automated workflow, the fulfillment automation level field of the record producer level item must be set to Fully automated. Once such an item is submitted, the automation level gets recorded.
    - **Note:** To use a different method to determine this KPI or add more sources (for example, automated catalog workflows), see Configure Success Dashboard indicators KPIs.
  - **Total ticket resolutions:** The number of HR issues resolved.

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- **Call deflection:** Calculated from the number of times per day requesters performed the actions, Ticket submissions using Service Catalog, Ticket submissions using Virtual Agent, Self-solved using Virtual Agent and Self-solved using Knowledge without Tier 1 agent intervention. See the formula:

```
[Catalog ticket submissions + VA ticket submissions +
 Self-solved (VA) + Self-solved (KB)]/ [Total tickets submitted
 + Self-solved (VA) + Self-solved (KB)] x 100
```

  - **Catalog ticket submissions:** HR cases submitted using the Service Catalog in the Service Portal or the Now Mobile app.
    - **HR Cases submitted using Service Catalog:** Number of HR case submissions from the Service Portal or Now Mobile app, as recorded in the HR case table with source as Self Service.
    - **Note:** If you use a different method to determine this KPI or add more sources (for example, automated catalog workflows), see Configure Success Dashboard indicators KPIs.
  - **VA ticket submissions:** Number of times the ticket was submitted using the Virtual Agent. This is determined by the deflection node instrumented in the Virtual Agent topic.
    - **HR Cases submitted using VA:** Number of HR case submissions from Service Portal or Now Mobile app, as recorded in the HR case table with the source as Virtual Agent.
    - **Note:** If you use a different method to determine this KPI or add more sources (for example, automated catalog workflows), see Configure Success Dashboard indicators KPIs.
  - **Self-solved deflections:** Number of issues or requests users solved on their own using the Virtual Agent and the Knowledge Base articles.

```
[Self-solved using Virtual Agent + Self-solved using
 Knowledge Articles]
```

    - **HR issues self-solved using Virtual Agent:** Number of times users solved their issue or requests in a Virtual Agent conversation. This is recorded in the deflection metrics table by the HR **VA Self-Resolving** deflection pattern instrumented in the conversation.
    - **HR issues self-solved using knowledge:** Number of times users solved their issues or requests on their own by reading Knowledge Base articles. This is determined when the user opened provided articles and did not create a case in a 24-hour window. This is recorded in the deflection metrics table with the **HR case deflection using Knowledge** deflection pattern.
    - **Note:** If you use a different method to determine this KPI or add more sources (for example, automated catalog workflows), see Configure Success Dashboard indicators KPIs.

- **Structured tickets completed:** Total number of HR cases completed successfully in the report range.

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- **Structured HR Cases Closed:** Number of HR cases with a state of **Closed complete** where the associated HR Service has any Fulfilment Type other than **Manual**.

- **Note:** If you use a different method to determine this KPI, see Configure Success Dashboard indicators KPIs.

- **Successful predictions:** Successful predictions works by Predictive Intelligence solutions, counted when the prediction made by the solution is the same as the final value. In the base system, this value is determined when the system uses classification to predict and the final value in the case table is the same as the predicted value.
  - **Successful predictions:** Total successful predictions by Predictive Intelligence and the Natural Language Understanding (NLU) solutions.
  - **Successful NLU predictions:** Successful prediction of the number of times the NLU prediction model accurately understood the intent of the user's conversation or auto-selected a topic.
    - **Successful HR case predictions:** Number of times successful predictions have been made by the Predictive Intelligence solutions. It is counted when the prediction made by the solution is the same as the final value of the field in the HR case table.

    - **Note:** If you use a different method to determine this KPI, see Configure Success Dashboard indicators KPIs.

Service Quality

- **Customer satisfaction score:** It is the average of the customer satisfaction scores based on the surveys conducted after the issue was resolved.

  HR Average CSAT: HR case normalized satisfaction score or the HR Service Delivery Survey instances.

- **Mean time to resolve:** It is the average of the time between the ticket creation and the ticket closure.

  HR Case MTTR: The sum duration of the closed HR cases or the number of closed HR cases.

- **% Breached SLA:** It is the percentage of the issues that were resolved after the Service Level Agreement (SLA)s was breached.

  HR cases Breached SLA%:

```
(Number of Closed HR cases with Breached SLAs / Number of
 Closed HR cases) * 100
```

- **% Tickets resolved without reassignment:** It is the percentage of tickets that are resolved without reassigning the ticket to a different user.

  % HR cases closed without reassignment: It shows the HR cases that were closed and has reassignment count as zero.

Proactive Prompts

Proactive Prompts enable contextual and proactive engagement for managers and employees by bringing actionable insights as prompts into their flow of work.

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Drive engagement

Drive proactive experiences to enable positive habit formation for managers and employees through continuous micro-actions from messaging channels. For example, Proactive Prompts encourages managers to adopt Journeys and other ServiceNow features.

Boost productivity

Define and empower managers to receive timely bite-sized insights and drive positive actions. Enable employees to stay on task by meeting them in their workflow, for example, by posting insights and actions on the Manager Hub portal. Create reminders in Employee Journey Management to enable employees to stay on task by prompting them in their flow of work.

Accessibility

Engage managers and employees through prompts displayed on the most reachable channels like Microsoft Teams. Motivate employees by sending bite-sized prompts in their natural workspaces, thus meeting them in their flow of work.

Get started

Explore  Detailed information on Proactive Prompts	Configure  Configure the application to get started
Use  Know how you can use Proactive Prompts	Reference  Get details about tokens, data sources, actions and channels in Proactive Prompts

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

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Exploring Proactive Prompts

Learn how to use the Proactive Prompts application in your organization, configuring the signal for prompts, generating the prompts, and displaying them with actions on the selected channels.

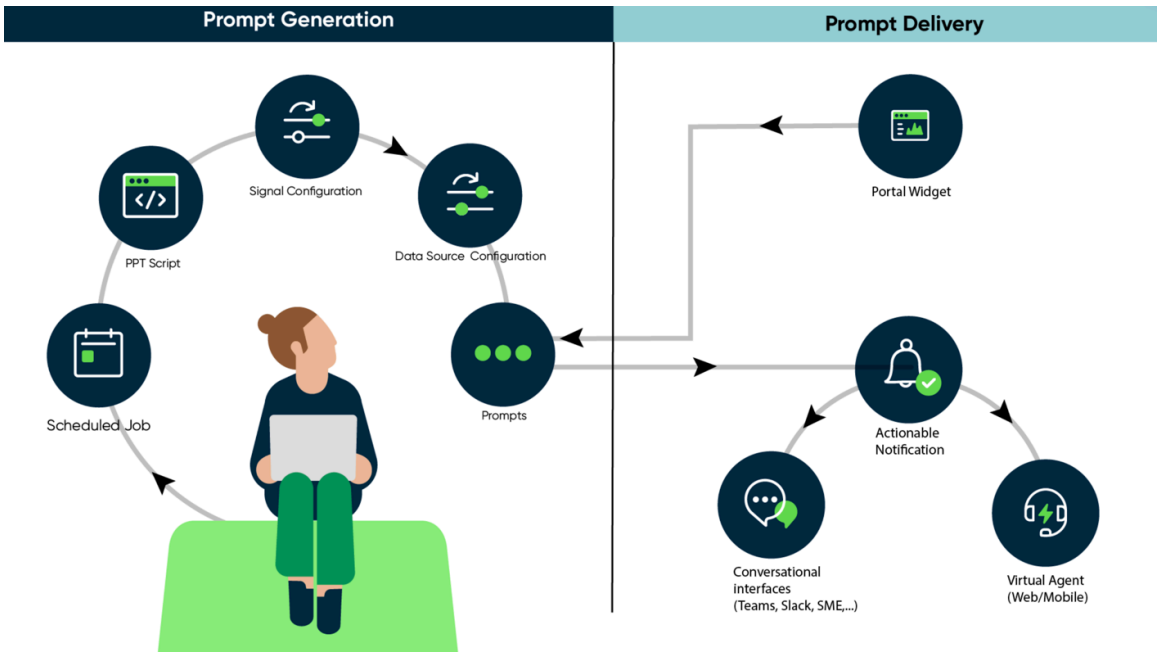
Proactive Prompts workflow

A scheduled job triggers the Proactive Prompts script that evaluates the signal configuration. Signal configuration contains two parts:

- Signal details such as to whom to send the prompt, on which channels, what actions are made available, and templates for the prompt message displayed to the user.
- Signal data source that contains data tables and conditions.

Prompts are then generated and sent to configured platforms like Service Portal, Microsoft Teams, Slack, or Virtual Agent.

The following image illustrates this Proactive Prompts workflow.



Channels in Proactive Prompts

Channels are the medium through which prompts are displayed to the end user in their flow of work.

The following table describes the channels available in Proactive Prompts.

Channels used in Proactive Prompts

Channels	Description
Portal widget	Prompts are displayed through a widget on the Employee Portal.

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Channels used in Proactive Prompts (continued)

Channels	Description
	Note: To see the prompts on the portal, the Prompt widget must be added to the portal page. For information on configuring portal pages, see Create and edit a page using the Service Portal Designer. For information on adding widgets to a page, see Service Portal widgets.
Virtual Agent	Prompts can also be delivered to different Conversational Interface (CI) channels through Virtual Agent, for example, Microsoft Teams or Slack.

Note: For more information, see Configure delivery channels in Proactive Prompts.

Configuring data

Configure signals, data sources, channels, categories, actions, and schedules to display prompts to managers and employees in their flow of work. For more information, see Configuring Proactive Prompts.

Proactive Prompts in Manager Hub

Generate and display micro insights to managers using Manager Hub through Proactive Prompts. The insights contain reminders about the team's service requests, journeys, and learnings, accompanied by relevant actions to communicate the information to the employees. For more information, see Proactive Prompts for managers.

Install Proactive Prompts

You can install the Proactive Prompts application (com.sn_pp) if you have the admin role.

Before you begin

Role required: sn_pp.admin

Note: You must install Glide Virtual Agent (com.glide.cs.chatbot) plugin before installing the Proactive Prompts plugin to start using the application.

Dependent plugins and apps for Proactive Prompts:

- Employee Center Pro (com.snc.employee_center_pro) - for portal actions and widgets.
- Microsoft Integrations – Core (com.snc.ms_teams) - to use Start chat action.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Proactive Prompts application (com.sn_pp) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.

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3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configuring Proactive Prompts

If you have the admin role, you can install the Proactive Prompts application and configure it to display relevant prompts to the managers and employees in your organization. With these instructions, you can enable workflow efficiency and quicker turnaround.

A signal is the configuration for prompts about when to send them, what to send, whom to send them to, where to send them, and related actions to generate and deliver them. You can define whom to send the signal to, how often, and on what channels. The Proactive Prompts application supports all conversational interface (CI) channels apart from the portal.

Note: You must install and activate both the Proactive Prompts and the Now Assist for HRSD application should be installed and to use the capability and prompts from the base system. The two new signals that are available for use are the Approvals pending prompt, and the High leave balance prompt.

Configuring Proactive Prompts is a multi-step process:

- Creating a signal. A signal determines when to send the prompt, what to send, whom to send it to, where to send it, and related actions to generate and deliver the prompts.
- Creating a data source for the signal. The signal data source brings in the most relevant information for managers or employees.
- Configuring channels. Choose where to display the prompts that would be the most benefit to your users.
- Configure actions. You determine the actions to generate and deliver the prompts.
- Configuring schedules. You choose the frequency that you want the data source to process the data and to generate the prompts in the selected channels.

Create a signal in Proactive Prompts

Configure signals to determine what prompts to send, whom to send them to, where and when to send them, and to generate them to send to your user.

Before you begin

Note: You must install and activate both the Proactive Prompts application and Now Assist for HRSD application so that you can use the capability and prompts from the base system. The two signals that are available for use are the Approvals pending prompt, and the High leave balance prompt.

Role required: sn_pp.admin

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Procedure

1. Navigate to **All** > **Proactive Prompts** > **Signal Configurations**.
2. Select **New**.
3. In the **Name** field, enter a name for the signal configuration.
4. In the **Description** field, enter a brief description about the signal.
5. Activate the signal by selecting the **Active** option.
6. In the **Schedule** field, select a schedule that determines the frequency of sending the prompt to the user.
   For more information on schedules, see Configure signal schedules in Proactive Prompts.
7. In the **Priority** field, select the priority to determine the display order of the prompts on the prompt widget.
   The available values are High, Low, or Medium.
8. In the **Order** field, select the order that is related to the signal.
9. In the **Category tags** field, select the category for the signal, which is used to pull the specific prompts on the prompt widget.
   For more information, see Configure signal categories in Proactive Prompts.
10. In the **Channels and actions** field, select the channel where you want the prompts to be displayed and the actions that you want to associate with the channel.
    For more information, see Configure delivery channels in Proactive Prompts.
11. In the **Receiving user** field, select the user that you want to receive the prompt, either the manager or an employee.

    Note:

    - The employee value is taken from the **User** field of the data source that is specified in the **Datasource** field.
    - The manager of an employee is derived from the **Manager** field in the User [sys_user] table.

12. On the **Signal Source** tab, select the data source method to retrieve the data in the **Datasource** field.
    For more information, see Types of data sources in Proactive Prompts.
13. On the **Prompt template** tab, fill in the fields.

    The content in the template is displayed as the content of the prompt to your user.

Prompt template fields

Field	Description
Prompt header	Header for the prompt or create a header. For information on adding a new header, see Add a new prompt header to identify the prompt. The header is an icon and a label that is displayed on the prompt to identify the type of prompt on the Employee Portal. For example, you could have headers for Skills, Learning, Roles, and so on.

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Field	Description
	Note: If no header is selected, then the header that's marked as default is added to the prompt and displayed.
Title	Title of the message when the prompt is displayed to the user.
Single record display	Template for the message to be displayed to the user when the prompt is generated for a single record.
Multiple record display	Template for the message to display to users when the prompt is generated for multiple records. For more information, see Tokens in Proactive Prompts.
URL	URL that the user can access in the **View details** option on the Employee Portal or **Take action** option for Virtual Agent. For more information, see Actions and action groups in Proactive Prompts.

You've created a template that is delivered as a message in the prompt to the user.

14. Select **Submit**.
    You've configured a signal that delivers the prompt message to the user in the frequency that you scheduled.

Add a new prompt header to identify the prompt

Add intuitive headers to the prompts displayed on the Employee Portal to enable users to identify the type of prompt easily.

Before you begin
Role required: sn_pp.admin

About this task
The predefined default header is Suggestion.

Procedure
1. Navigate to **All** > **Proactive Prompts** > **Administration** > **Signal Configurations**.
2. Select **New**.
3. In the **Name** field, enter a name for the signal configuration.
4. In the **Schedule** field, determine the frequency to send the prompt to the user.
5. Select the **Prompt Template** tab.
6. Select the Lookup using list icon ( ) next to the **Prompt header** field.
7. On the Prompt Header Configurations page, select **New**.
8. In the **Label** field, enter a name to describe the header.

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9. Select **Active** to activate the new header.
10. **Optional:** Add an icon to accompany the header.

    a. In the **Icon** field, select the **Click to add** link.

    b. Select **Choose file** to select an image from your local drive.
    The supported file types are .jpg, .png, .bmp, .gif, .jpeg, .ico, and .svg.

    c. Select **OK**.

11. **Optional:** Select the **Is default** field to mark the header as the default header.
    This header will be selected if no value is provided in the **Prompt header** field.

    If a default header has already been selected, an error message is displayed. You must clear that selection before being able to set this header as the default.

    Note:

    If you don't see the **Is default** field, you can add it to the layout.

12. Select **Submit**.
13. **Optional:** Add more headers by repeating steps 4 through 10.

Result
The newest header added is selected in the **Prompt header** field.

Create a data source for a signal in Proactive Prompts

Specify where and how to get the data you want to use to send insights to users.

Before you begin
Role required: sn_pp.admin

Procedure

1. Navigate to **All** > **Proactive Prompts** > **Signal Data Sources**.
2. Select **New**.
3. On the Signal data source form, fill in the fields.
   For a description of the field values, see Signal data source form.
4. Select **Submit**.

Configure delivery channels in Proactive Prompts

Configure a channel to display the prompts to end users in their workflow.

Before you begin
Role required: sn_pp.admin

Procedure

1. Navigate to **All** > **Proactive Prompts** > **Signal Channel Configurations**.
2. Select **New**.
3. On the form, fill in the fields:

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Signal channel configuration form

Fields	Description
Name	Name of the Signal channel configuration.
Application	The scope in which the application is created.
Portal	Option to select Employee Portal as the channel to display the prompts.
Portal action group	The action group applicable to the prompts displayed on the portal. Action groups include some frequently used actions for quick access to the end user. For more information, see Action groups.
Virtual agent	Option to select Virtual Agent as the channel to display the prompts.
Virtual agent actions	The Virtual Agent actions (both NLU and LLM type) from the Signal action [sn_pp_signal_action] table that can be performed by the end user. For more information, see Configure signal actions for Proactive Prompts. **Note:** A maximum of three NLU based Virtual Agent actions and three LLM based Virtual Agent actions can only be selected for each channel configuration record.

4. Click **Submit**.

Configure signal categories in Proactive Prompts

Create and configure categories to enable efficient search of prompts grouped under the same categories.

Before you begin
Role required: sn_pp.admin

About this task
Signal categories are the logical groups used to label and divide the signals. Categories also enable you to pull category-specific prompts on the prompt widget.

Procedure

1. Navigate to **All** > **Proactive Prompts** > **Signal categories**.
2. Select **New**.
3. On the form, fill in the fields:

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Signal categories form

Fields	Description
Name	Name of the signal category.
Description	A brief description of the signal category.
Active	Option to activate the signal category record.

4. Select **Submit**.

Configure signal actions for Proactive Prompts

Set signal actions to enable end users who receive a prompt through Virtual Agent to act on it.

Before you begin

Note: Signal actions are used for Virtual Agent. Employee Portal uses the action group for actions.

Role required: sn_pp.admin

Procedure

1. Navigate to **All** > **Proactive Prompts** > **Signal Actions**.
2. Select **New**.
3. On the form, fill in the fields:

Signal actions form

Fields	Description
Name	Name of the signal action.
Model type	Choose whether you want to use the regular NLU based Virtual Agent topics or LLM based Virtual Agent topics in the VA topic field. Your options are: ○ NLU/Keyword ○ LLM
VA topic	The relevant Virtual Agent topic for the signal action. For more information on creating a Virtual Agent topic, see Create a Virtual Agent topic. For information on publishing the topics, see Publish a Virtual Agent topic.
Active	Option to activate the signal action record.

4. Select **Submit**.

Configure signal schedules in Proactive Prompts

Schedule that determines when to run the signal configuration to generate prompts that notify the user to act on.

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Before you begin

The signal schedule is the triggering action in the prompt's workflow that evaluates the configuration and generates prompts that are then delivered to users.

Role required: sn_pp.admin

Procedure

1. Navigate to **All** > **Proactive Prompts** > **Signal Schedules**.
2. Select **New**.
3. On the form, fill in the fields:

Signal schedule form

Field	Description
Name	Name of the signal schedule job.
Active	Option to activate the signal schedule job.
Conditional	Option to run the scheduled job based on certain conditions in the associated script.
Condition	Conditional script that determines whether a scheduled job must run. The last expression of the script should evaluate to a Boolean (true or false) value. **Note:** This field is displayed only when the **Conditional** option is selected.
Run	Type of schedule to execute the job on. The available options are: ○ Daily ○ Weekly ○ Monthly ○ Periodically ○ Once ○ On demand ○ Business Calendar: Entry Start ○ Business Calendar: Entry End
Time zone	Time zone of the signal schedule job. The Use System Time Zone option causes the job to run in the time zone of the instance running the job. If no time zone is selected, the job runs in the time zone of the user who entered the time.
Time	The time when the schedule must be executed in 24-hour clock format.

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Field	Description
	Note: This field is available only when the **Run** field value is Daily, Weekly, or Monthly.

4. Select **Submit**.

Add and configure the prompt widget

Add and configure the prompt widget to access Proactive Prompts on a portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > *Service Portal* > **Pages**.
2. Search and select a page to add the prompt widget.
   You can also create a new page and then add the widget. For more information, see Create and edit a page using the Service Portal Designer and Service Portal widgets.
3. Select the **Open in Designer** related link.
   The Service Portal Designer is displayed.
4. In the Widgets tab, search for prompts and drag the prompts widget on to the Edit area.
5. Select the ( ) edit icon on the top-right corner of the widget.
6. Edit the form.

Prompt container fields

Field	Description
Prompt categories	Categories to pull and add category-specific prompts on the prompt widget. For information on signal categories, see Configure signal categories in Proactive Prompts.
Persona	Persona to filter and display the prompts on the widget. The options are, Manager, or Employee.
Title	Title to be displayed on the widget.
Show Menu	Displays the Manage Preferences menu on the widget that enables you to turn on or off the display of the prompts individually.
Max prompt count	The maximum number of prompts displayed on the widget.
Prompts per row	The number of prompts displayed at a time on the widget. The next set of prompts can be accessed with a slider on the widget.

7. Select **Save**.

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Using Proactive Prompts

You can use Proactive Prompts application to send informative and actionable insights to managers and employees by keeping them informed and encouraging them to act immediately.

After a successful signal configuration in Proactive Prompts, prompts are generated according to the schedule in the configuration.

To see the list of prompts, navigate to **All** > **Proactive Prompts** > **Prompts**. The following details are displayed for each prompt: Receiver name, Signal name, Status, Prompt template, Tokens, and Created date. For more details, like the related **Action table** and **Action taken** fields, select the View content details icon ( ).

Note: Prompts are deleted automatically after 180 days of creation using the Auto Flush feature.

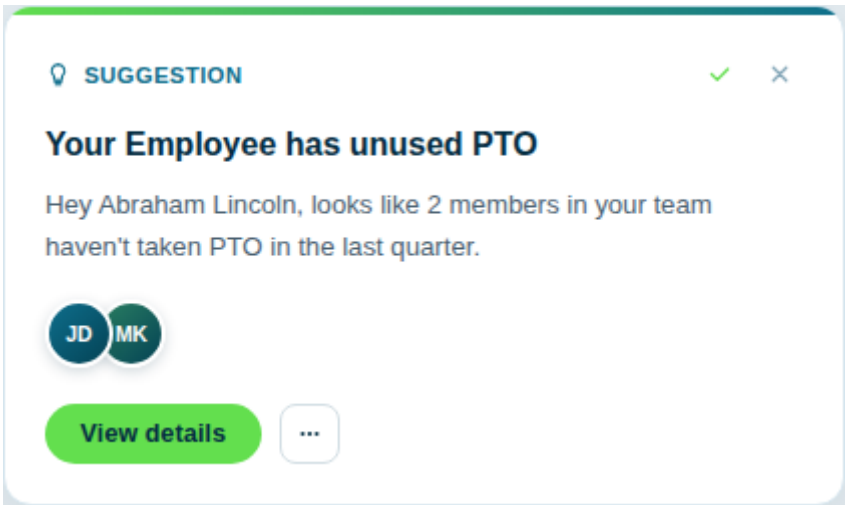
Prompts in delivery channels

Prompts are delivered to end users through various channels like Employee Portal, Virtual Agent, or Microsoft Teams.

Notifications of prompts and the prompt appearance are different in different channels.

- Prompt widget - On any portal, prompts are displayed through a widget. The Prompt widget is available by default but must be added to the portal. For more information, see Add and configure the prompt widget.

  The following image shows an example of a prompt widget on the Employee Portal. The **View details** button provides more details of the prompt. The details displayed depend on the type of Datasource, the Receiving user and the template (Single or Multiple record display) selected. For more information, see Create a signal in Proactive Prompts. For more information on actions on the widget, see Actions and action groups in Proactive Prompts.



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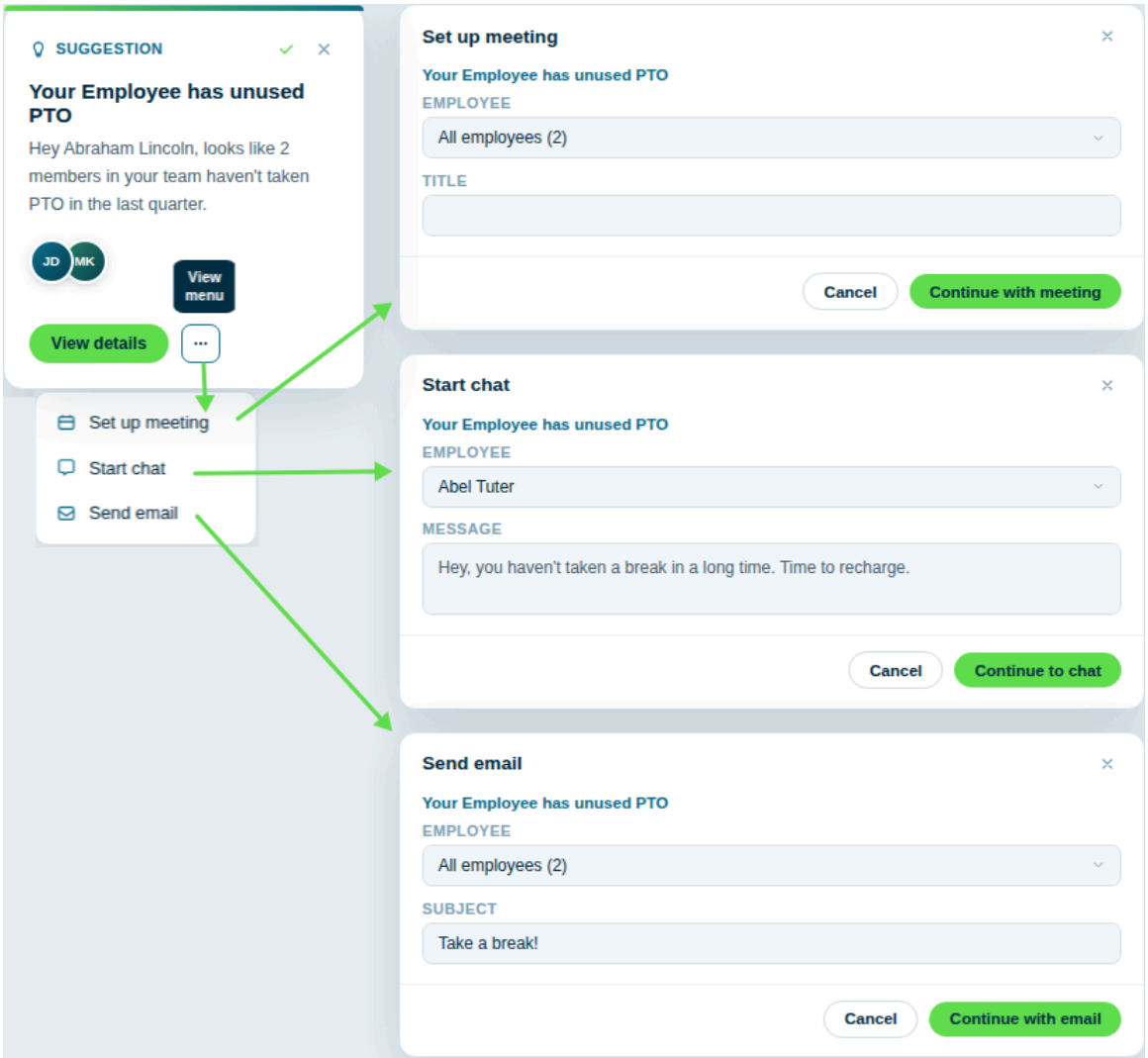

Note: The generated prompts are delivered to the widget only when the user opens the portal.

- Virtual Agent - A notification is displayed on the Virtual Agent chat icon to indicate that there's a prompt message. Selecting the **Open chat window** button starts the chat displaying the prompt message and options to take further actions.

  The following image shows an example of a prompt notification in Virtual Agent.

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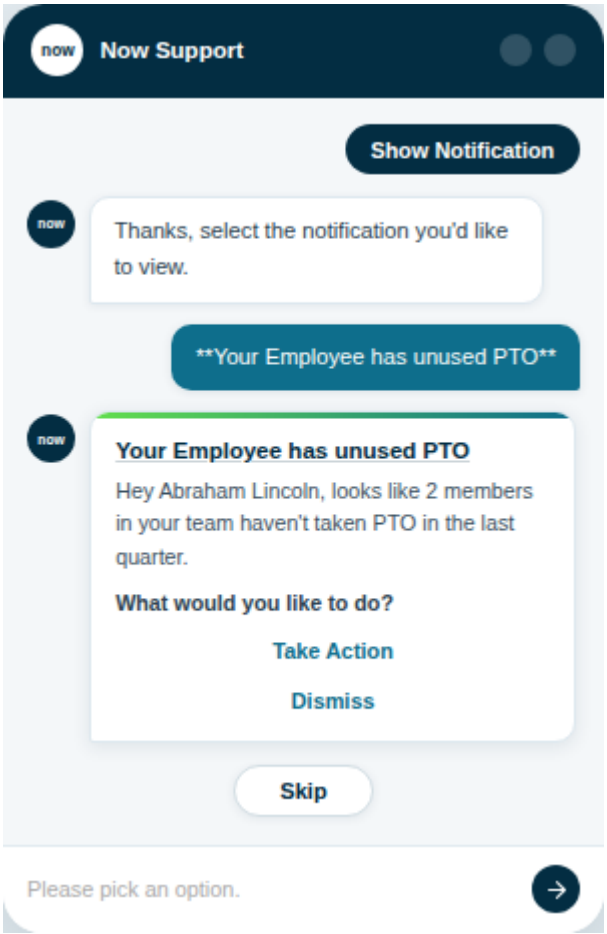

- Microsoft Teams - Similar to the Virtual Agent chat, a notification is displayed in the chat pane. Selecting the Now Virtual Agent contact initiates the chat.

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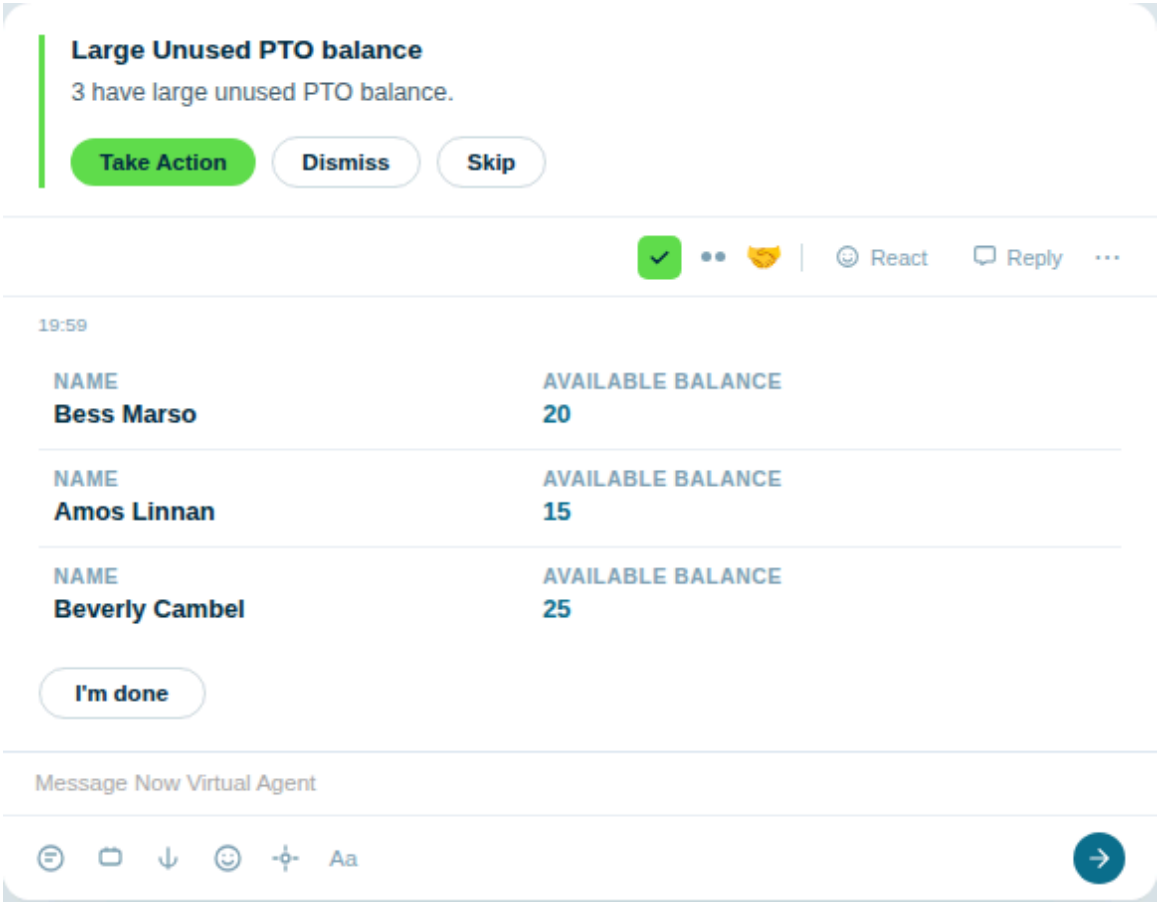
The following image shows an example of a prompt notification in Microsoft Teams.



Now Assist with Proactive Prompts

Your employees and managers can use conversational actions to see their pending HR tasks and how much remaining time off they have by using the Now Assist with the Proactive Prompts integration.

The Proactive Prompts with the Now Assist integration uses large language models (Now LLM Service) to create a natural-language conversational experience that can improve the success of your prompts.

Note: Proactive Prompts support Now LLM Service actions for a more intelligent and flexible conversational experience.

A signal is the configuration for instructions about when to send them, what to send, whom to send them to, where to send them, and related actions to generate and deliver them. You can define whom to send the signal to, how often, and on what channels. The following two signal configurations are available so that your employees and managers can experience the Now LLM Service capabilities in Proactive Prompts:

- Approvals pending: Displays a prompt to the employee on their pending HR tasks for approval. The corresponding action for this signal configuration is **Show Approvals**.
- High PTO balance: Displays a prompt to the employee if more than 80 percent of their leaves are remaining. The corresponding action for this signal configuration is **Request PTO**.

The **Show Approvals** and **Request PTO** actions aren't available by default to add to the signal configuration as they're inactive. Follow these steps to activate these actions:

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- Create and publish the Now LLM Service topics. For information on creating a Virtual Agent topic, see Create a Virtual Agent topic. For information on publishing a Virtual Agent topic, see Publish a Virtual Agent topic
- Create signal actions forProactive Prompts. For information about configuring signal actions for Proactive Prompts, see Configure signal actions for Proactive Prompts.
- Select the actions in the signal channel configuration. For information on configuring the delivery channels in Proactive Prompts, see Configure delivery channels in Proactive Prompts.

> **Note:** You can select both NLU and Now LLM Service actions in the **Virtual agent actions** field.

A single signal configuration caters to both NLU and Now LLM Service prompts and actions. The prompt is delivered to the portals depending on their Virtual Agent configuration. For example, if the portal has Now Assist configured, Now LLM Service prompts and actions are delivered. If the portal has NLU configured, NLU prompts and actions are delivered from the same signal configuration. For more information on the signal configuration, see Create a signal in Proactive Prompts.

Opting out of a prompt in Employee Portal

Choose not to receive a specific prompt by opting out of the signal displayed in Employee Portal.

Before you begin

Role required: none

- Make sure that Manager Hub and Talent Development installed to access these tabs in the Employee Portal.
- To access the prompts on any other portal page in the Employee Portal, the Prompt widget must be added. For information on configuring portal pages, see Create and edit a page using the Service Portal Designer. For information on adding widgets to a page, see Service Portal widgets.

Procedure

1. Navigate to **All** > **Employee Center**.
2. In Employee Center, navigate to the appropriate hub depending on whether you are a manager or employee.
   - If you are a manager, navigate to **Your team** > **Manager Hub**.
   - If you are an employee, navigate to **Your career** > **Career Hub**.
3. On the prompt widget, display a list of all signals by selecting the Manage preferences icon ( ).

   > **Note:** All signals for which there is a prompt in the prompts table are listed regardless of their status.

4. Select **Off** for the signal that you want to opt out of.

   > **Note:** If you decide you want to receive the prompt again, you would select **On**.

5. Select **Update**.

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Result
You will not receive prompts from the selected signal. The opted-out prompts are moved to the Dismiss state.

Opting out of a prompt in Virtual Agent

Choose not to receive a specific prompt by opting out of the signal displayed in Virtual Agent.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Employee Center**.
2. Select the chat icon () to start the Virtual Agent.
3. Type `Show notifications`.
   All your notifications are displayed.
4. Select the signal that you want to opt out of.
5. Select the **Dismiss** option to withdraw from the signal.
6. In the next set of actions, select **Opt-out** to unsubscribe from the signal.

   Note: The **Not relevant to me** action dismisses the current prompt and not the entire signal.

7. Select **Yes** to confirm your choice.

Result
You will not receive prompts from the selected signal. The opted-out prompts are moved to the Dismiss state.

Proactive Prompts dashboard

Use the Proactive Prompts dashboard to view the usage analytics and key metrics of the prompts that are generated to provide actionable insights in the flow of work.

To access the dashboard, navigate to **All** > **Proactive Prompts** > **Administration** > **Usage Analytics Dashboard**.

End users and roles

Dashboard Viewer (sn_pp.dashboard_viewer) can view the dashboard with various prompt metrics for the selected time period.

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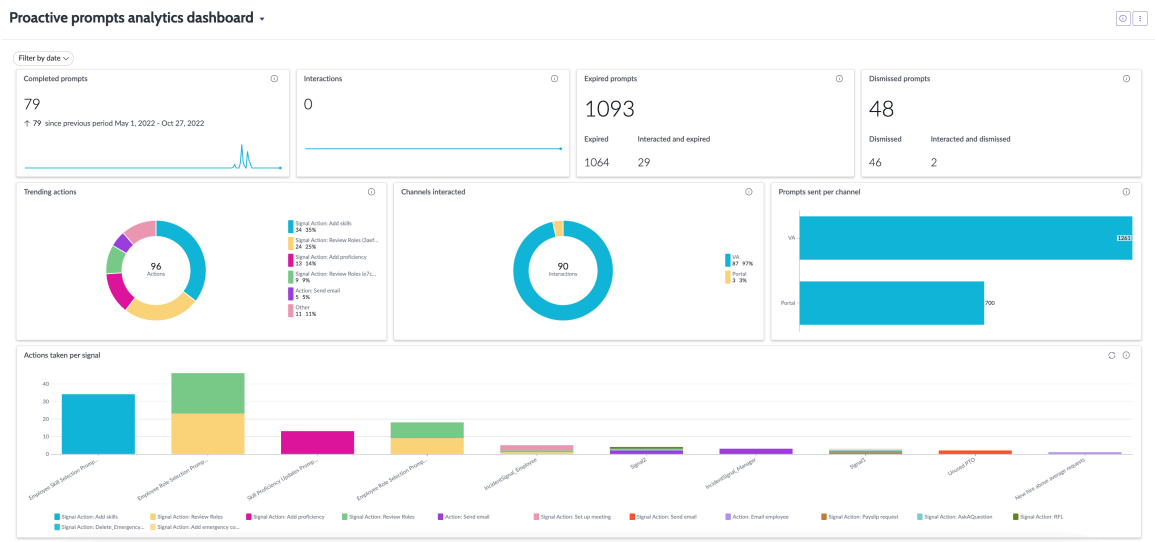

Reports and indicators

Widgets in the dashboard

Title	Type	Description
Completed prompts	Single score	Number of prompts marked as Complete by Proactive Prompts users.
Interactions	Single score	Number of interactions (action clicks) performed as a result of prompts.
Expired prompts	Single score	Number of prompts that expired after the time-out period. The number is further divided into Expired prompts, which expired with no interaction from the user, and Interacted and Expired prompts, which involved a user interaction at some point but later expired.
Dismissed prompts	Single score	Number of prompts viewed and dismissed by the users. The number is further divided into Dismissed prompts, which were not interacted with, and Interacted and Dismissed prompts, which involved a user interaction but that later were dismissed.
Trending actions	Donut	Actions preferred by users who interact with prompts.
Channels interacted	Donut	Channels in which users are interacting with prompts.

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Widgets in the dashboard (continued)

Title	Type	Description
Prompts sent per channel	Horizontal bar	Number of prompts generated for each channel.
Actions taken per signal	Stacked column	Various actions taken by the users based on a signal prompt.

To see a detailed view and in-depth analysis of the widget click it.

Use the **Filter by date** option to select a time period and view the analytics in the given time period.

Reference for Proactive Prompts

Reference topics provide additional information about user roles, tables, and default configurations in Proactive Prompts.

Components installed with Proactive Prompts

Several types of components install with the activation of the Proactive Prompts application, including user roles and tables.

Proactive Prompts roles

Roles in Proactive Prompts

Role name	Operations	Contains roles
sn_pp.admin	Can create and manage all Proactive Prompts configurations and features. CRUD (create, read, update and delete) access to all the tables.	• sn_pp.reader • sn_pp.writer
sn_pp.reader	Read access on the Prompt [sn_pp_prompt], Prompt users [sn_pp_prompt_users], and Prompt details [sn_pp_prompt_details] tables.	
sn_pp.writer	Can view, modify, or create prompts. Write access on the Prompt [sn_pp_prompt], Prompt users [sn_pp_prompt_users], and Prompt details [sn_pp_prompt_details] tables.	sn_pp.reader

You can assign these roles to the appropriate roles, groups, or users in your application.

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- To assign a role to another role, see Add a role to an existing role.
- To assign a role to a group, see Assign a role to a group.
- To assign a role to a user, see Assign a role to a user.

Tables installed

Tables in Proactive Prompts

Table	Description
Signal configuration [sn_pp_signal_config]	Stores signal configuration data like receiving user, frequency of sending prompts, title, prompt template, category, priority, channels, and actions.
Auto signal [sn_pp_auto_signal]	Stores the schedules for the signal to run.
Signal channel configuration [sn_pp_signal_channel_config]	Stores the channels configuration for a signal, such as the channels on which this signal prompt should be sent to and the actions for each channel.
Signal actions [sn_pp_signal_action]	Stores the Virtual Agent actions that the user can take on receiving the prompt.
Signal data source [sn_pp_signal_data_source]	Stores the source table definition and data extraction logic either from simple conditions or with aggregations or advanced scripting or Performance Analytics Indicator. Also includes threshold to evaluate the data against.
Signal user configuration [sn_pp_signal_user_config]	Stores additional criteria applied to users eligible for prompt.
Signal category [sn_pp_signal_category]	Stores the signal category used to identify the prompt type.
Signal executions [sn_pp_signal_executions]	Stores the executions details for every prompt.
Prompts [sn_pp_prompt]	Stores all the prompts generated by a signal.
Prompt details [sn_pp_prompt_details]	Stores the employee information qualified for the prompt or signal when the receiving user is the manager.
Prompt users [sn_pp_prompt_users]	Stores the record level information qualified for the prompt when the **Collect records** field is selected.

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Tokens in Proactive Prompts

Token placeholders indicate the data that will be replaced during runtime.

When creating a signal, the message displayed to the user is written in the Single record display and Multiple record display fields. Use tokens in these messages to indicate data that will be replaced dynamically during runtime. For example, the message "Hey ${receiving_user}, looks like ${user_count} members in your team haven't taken PTO in the last quarter" will be displayed as "Hey Abel Tuter, looks like 2 members in your team haven't taken PTO in the last quarter".

Types of Tokens

- receiving_user: Name of the recipient of the prompt.
- user_name: Name of the employee.

  Note: If the recipient is the manager and only one employee under that manager qualifies for the signal, use the employee's name directly with this token.

- user_count: Count of employees under the manager that qualify for the signal.
- item_count: Count of records belonging to the employee that qualified the signal.
- item: If only one record belongs to the employee that qualifies the signal, the value in the Display field of the data source is stored in this token.
- score: The score used in the threshold evaluation.

Note: * indicates that tokens can only be used when the **Collect records** field is selected.

Tokens for prompt templates

Data source type	Persona	Tokens (Single record)	Tokens (Multiple records)
Simple	Manager	None	receiving_user, user_count
Aggregate as count	Manager	receiving_user,item_count, user_name	receiving_user, user_count
Aggregate as none	Manager	receiving_user,item_count, user_name	receiving_user, user_count
Script	Manager	receiving_user,item_count*, user_name	receiving_user, user_count
Performance Analytics Indicator	Manager	receiving_user,score, item_count*,user_name	receiving_user, user_count
Simple	Employee		
Aggregate as count	Employee	receiving_user,score, item*	receiving_user, item_count
Aggregate as none	Employee	receiving_user, score, item*	receiving_user, item_count
Script	Employee	receiving_user, score, item*	receiving_user, item_count*

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Tokens for prompt templates (continued)

Data source type	Persona	Tokens (Single record)	Tokens (Multiple records)
Performance Analytics Indicator	Employee	receiving_user, score, item*	receiving_user, item_count*

Types of data sources in Proactive Prompts

Data sources are the different type of data retrieving methods from data tables in Proactive Prompts.

Data sources used in Proactive Prompts

Data source type	Description
Simple	Retrieves data from a single data table. For example, this type of table can be used to prompt the manager about employee not changing the current role, or prompt the employee about high unused PTO balance. **Note:** Use the Simple type of data source when you're sure that the data source output returns one record per user selected from the **User** field. Otherwise, the framework considers only the first record and skips the remaining records. For multiple records, choose the Aggregated data source.
Aggregate	Allows use of aggregate functions on the data source, for example, Count. For example, this type of table can be used to prompt the managers about large number of requests from new hires, or prompt the employee about the number of overdue tasks. **Note:** • If the Aggregate value is none, the admin should select a score field from the table to be used in the Threshold evaluation. • The aggregation (Count) is grouped by the **User** field.
Script	For complex conditions, use this data source to write code and retrieve data. For example, this type of table can be used to prompt the manager about large number of comments on a case.

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Data sources used in Proactive Prompts (continued)

Data source type	Description
	The script should return a comma-separated list of objects with the following key-value pairs: • user: sys_id of the sys_user record. • score: Numerical score string if Collect records is checked. • record: sys_id of the corresponding record in the sourceTable. • sourceTable: The table from which the scores are obtained. • displayValue: Name shown in the View details. • displayLabel: Label name that represents the displayValue.
Performance Analytics Indicator	Uses the data collected by the Performance Analytics job for the selected indicator and breakdown. For example, this type of table can be used to prompt the manager about number of open incidents. **Note:** The Performance Analytics job must be run to process the data. For more information, see Activate Performance Analytics jobs.

Actions and action groups in Proactive Prompts

Actions provide the user the ability to act on the prompt.

The types of actions available differ based on the channel. Unless otherwise noted, the actions in the following table are available for Employee Portal and Virtual Agent.

Actions in Proactive Prompts

Action	Description
View details	Enables the user to see more details about the prompt, including any URL provided in the signal configuration. Users can also access links directly to the items/tasks/records based on the URL configured in the Script data source. For more information see, Create a signal in Proactive Prompts.

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Actions in Proactive Prompts (continued)

Action	Description
	Note: • The display of links to items/tasks/ records only works with the Script data source. • The details displayed are influenced by the selection in the Collect records field. • This action is available only for the Employee Portal. In Virtual Agent, the details are displayed by default.
Send email	The user can send an email directly from the prompt. This action takes the user directly to the compose window depending on the default mail client configured in your organization. Users can choose to send the email to one user or all users at the same time. **Note:** Only active users with their email configured in the User [sys_user] table can be selected to send the email.
Set up meeting	The user can schedule a meeting via the default mail client like Outlook or Gmail based on your organization's configuration. **Note:** • This action has a configurable action parameter *`mailClient`* of type string. By default, the mail client is Outlook. You can change it to Gmail. • Only active users with their email configured in the User [sys_user] table can be selected to set up a meeting. • This parameter is applicable only for Employee Portal actions.
Start chat	The user can talk to the stake holder one-on-one via Microsoft Teams.

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Actions in Proactive Prompts (continued)

Action	Description
	Note: • The Start chat action requires the com.snc.ms_teams plugin to have been installed. • Only active users with their email configured in the User [sys_user] table can be selected to start a chat.

Note: The configurable action parameter **selectindividual** under Actions in the Employee Center Action framework determines whether you can select all employees or one individual employee for the Send email, Set up meeting, and Start chat actions. The default value is false. This parameter is applicable only for actions in Employee Portal.

Action groups

Action groups are a collection of frequently used actions in a framework for quick access. Action groups are used only in Employee Portal. For Proactive Prompts, the action groups available are:

- Chat action group
- Email action group

For more information, see Action group.

Signal data source form

Form to create a data source for the signal.

Signal data source fields

Fields	Description
Name	Name of the signal data source.
Description	Brief description of the signal data source.
Type	The type of data source that you want to create. The available values are: • Simple • Aggregated • Scripted • Indicator (Performance Analytics Indicator) • Subflow For more information, see Types of data sources in Proactive Prompts.
Script	The script to retrieve the data source. Follow the example script provided in the field for successful execution of the script.

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Signal data source fields (continued)

Fields	Description
	Note: This field is available only when the Scripted option is selected in the **Type** field.
Subflow	Any published subflow created using Workflow Studio as the data source.
Indicator	The type of performance measurement for the Indicator data source type. **Note:** Only automated indicators that are published on the Analytics hub are supported.
Breakdown	The field to group or filter indicator scores by a qualitative attribute such as Priority, Category, or Assignment Group. **Note:** Only breakdowns whose breakdown source field is available in the User [sys_user] table can be selected.
Table	The table used as the source to obtain the data.
Condition	Criteria that must be met to retrieve the data from the table. For example, the condition **[Available balance][Greater than][10]** would retrieve an unused PTO balance of more than 10 days.
User field	The field from the data table used to group the data source records.
Applies to	The user configuration to filter the data in the **User** field.
Can be evaluated for a single user	Enables the source to be supported for a single user execution. By selecting this option, the prompt is generated for the current logged-in user at run time. **Note:** For Script and Subflow data source types, an additional parameter is added to handle the user.
Can be evaluated for a given date	Enables the source to be executed for the selected date. By selecting this option, the prompt is generated on the selected date.

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Signal data source fields (continued)

Fields	Description
	Note: For Script and Subflow data source types, an additional parameter is added to handle the date.
Collect records	Option to get record details when delivering the prompt message. **Note:** • If Indicator is selected as the data source type, then the **Collect records** option must also be set to true on the selected indicator record. • Selecting this option stores the display field value in the Prompt details [sn_pp_prompt_details] table. • Selecting this option influences the View details action. • If the **Include zero records** field is selected, the **Collect records** option cannot be used.
Display field	A field from the source table that is displayed in the View details action and in the prompt message to represent a record from the table. For example, in the HR Case [sn_hr_core_case] table, an HR case can be represented with a case number, a short description, or any other field in the table. **Note:** • This field is displayed only when the **Collect records** field is selected. • The item token contains the value of this field.
Threshold Condition	
Aggregate	Aggregate type. This field is available only when the selected data source is Aggregate.
Condition	Condition for the threshold value. The available values are: • Less than • Less than or is • Is

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Signal data source fields (continued)

Fields	Description
	• Greater than or is • Greater than
Value	A value for the condition provided in the **Condition** field. For example, to find the count of more than five overdue tasks, the **Value** number would be 5, and the full condition would be **[Overdue tasks][Greater than][5]**.
Score field	The field used for score evaluation. **Note:** This field is available only when the selected data source type is Aggregated and the **Aggregate** field value is None. Only the fields that have numerical values can be selected.
Use percentile	Option to use relative comparison instead of static comparison against a fixed number.
Percentile value	Percentile value for the threshold condition. This field appears only when the **Use percentile** field is selected. The available values are: • Lower outliers • 25 percentile • Median • 75 percentile • Higher outliers
Include zero records	Option to include users without any records in the table. For example, select this option to send a prompt to the employees who have no PTO balance. **Note:** You can narrow down the users with zero records by selecting a user configuration in the **Applies to** field. For example, you can send prompts to employees in the HR department with no records in the selected table.

Signal configuration form

Form to create a signal in Proactive Prompts.

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Signal configuration fields

Fields	Description
Name	Name of the signal configuration.
Description	Brief description of the signal configuration.
Active	Option to activate the signal configuration.
Schedule	Determines how frequently to send the prompt to the user. For more information, see Configure signal schedules in Proactive Prompts.
Priority	Determines the display order of prompts on the prompt widget. The available values are High, Low, or Medium.
Order	Stores the order related to the signal.
Category tags	The category for the signal, which is used to pull specific prompts on the prompt widget. For more information, see Configure signal categories in Proactive Prompts.
Channels and actions	The channel where the prompts should be displayed and the actions associated with the channel. For more information, see Configure delivery channels in Proactive Prompts.
Receiving user	The user to receive the prompt, either the manager or an employee. **Note:** • The employee value is taken from the **User** field of the data source specified in the **Datasource** field. • The manager of an employee is derived from the **Manager** field in the User [sys_user] table.
Signal Source	
Datasource	The data source method to retrieve the data. For more information, see Types of data sources in Proactive Prompts.
Prompt Template	
Prompt header	Icon and label displayed on the Employee Portal to identify the type of prompt. For example, you could have headers for Skills, Learning, Roles, and so on.

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Signal configuration fields (continued)

Fields	Description
	For information on adding headers, see Add a new prompt header to identify the prompt.
Title	Title of the message when the prompt is displayed to the user.
Single record display	A template for the message to be displayed to the user when the prompt is generated for a single record.
Multiple record display	A template for the message to display to users when the prompt is generated for multiple records. For more information on tokens, see Tokens in Proactive Prompts.
URL	A URL that the user can access in the **View details** action on the Employee Portal or **Take action** action for Virtual Agent. For more information, see Actions and action groups in Proactive Prompts.

HR Service Delivery for mobile

The HR Service Delivery for mobile plugin enables employees to access HR Service Delivery features from their mobile devices.

Employees can view HR requests, discover knowledge articles, request help, complete HR tasks, chat with a virtual agent, and more.

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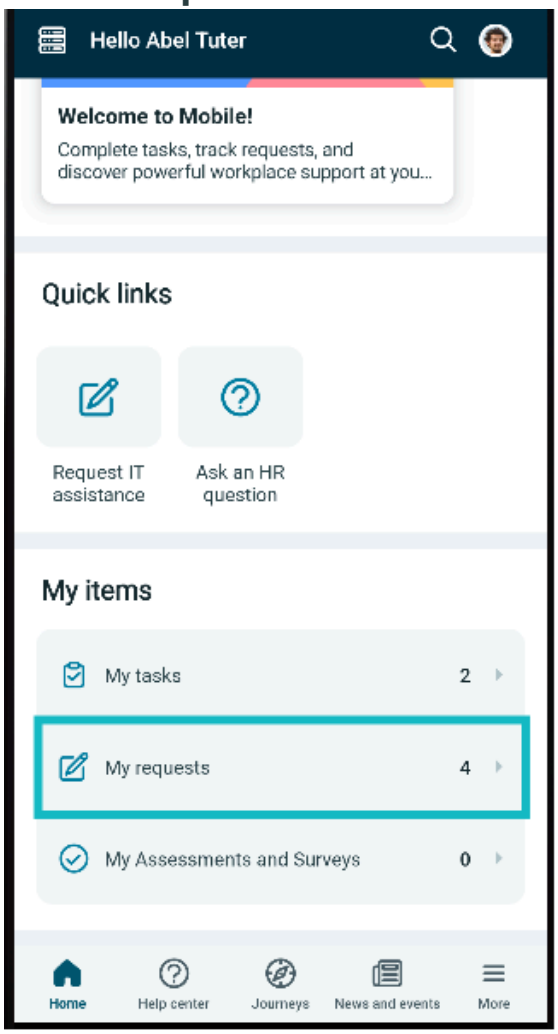
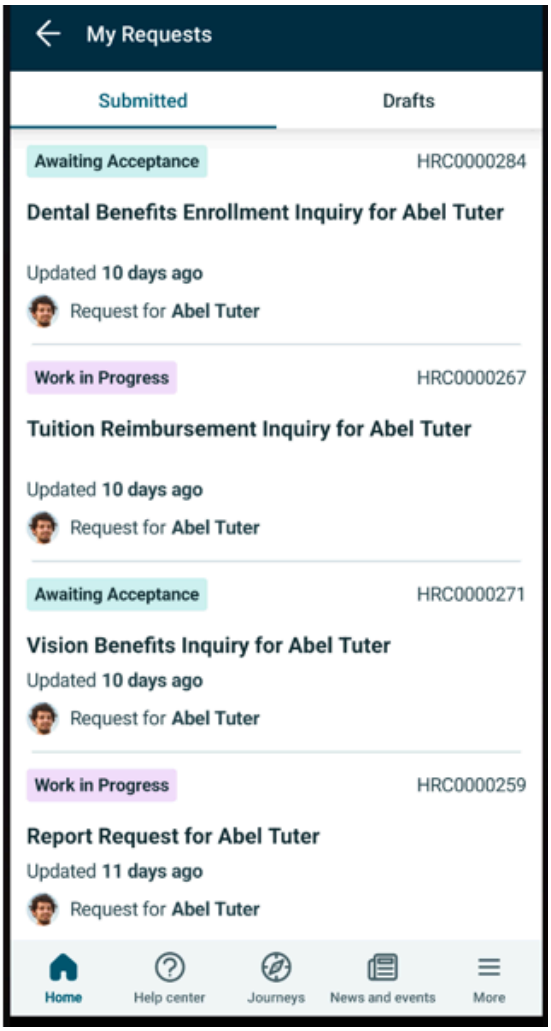
View HR requests





Employees can view their HR requests from the **Home** tab by selecting **My Requests**.

Note: If you're using the Now Mobile app with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin, hiring managers can track the onboarding progress of their new hires in a single and consolidated section. See Hiring manager experience for new hire onboarding for more information.

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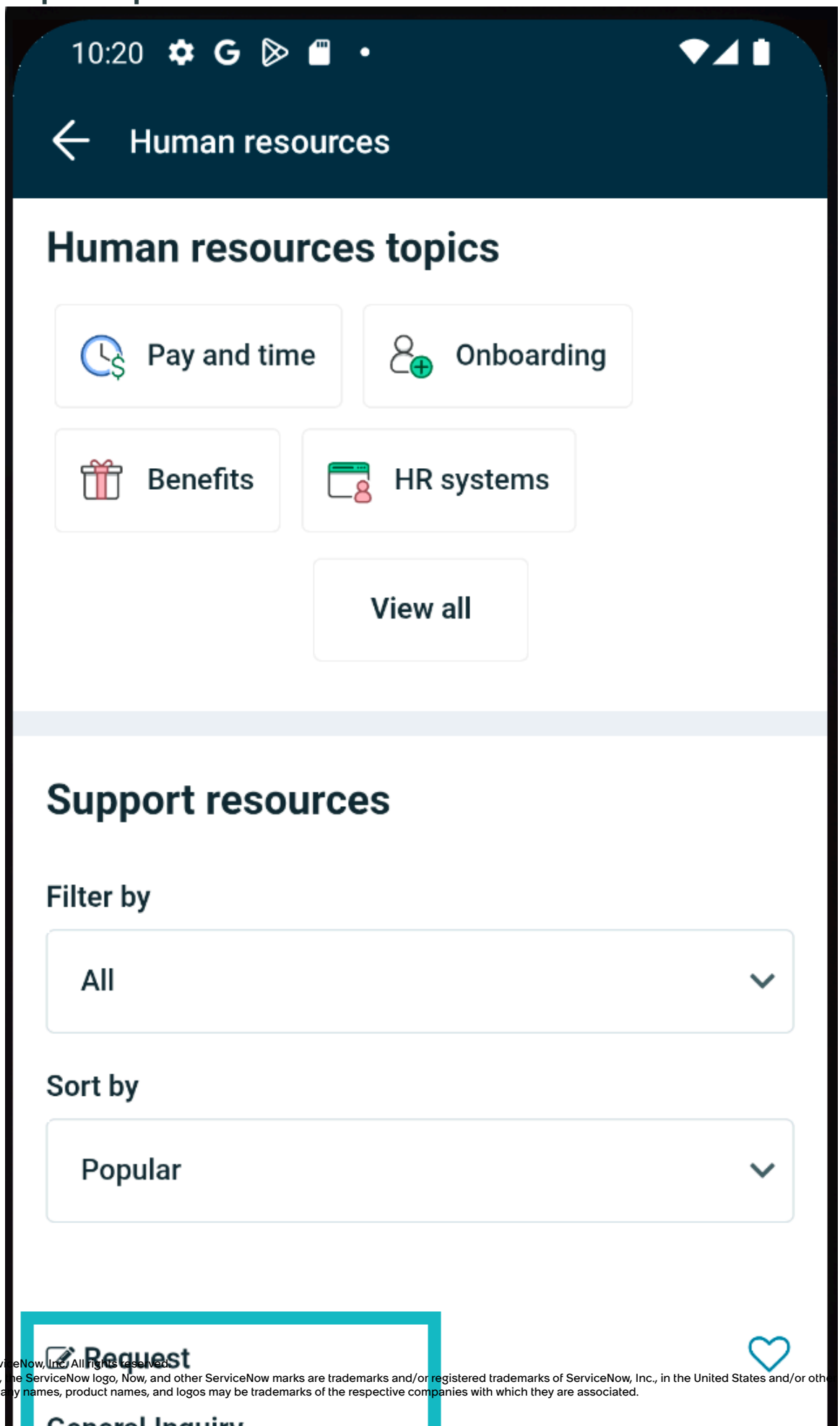
Request help



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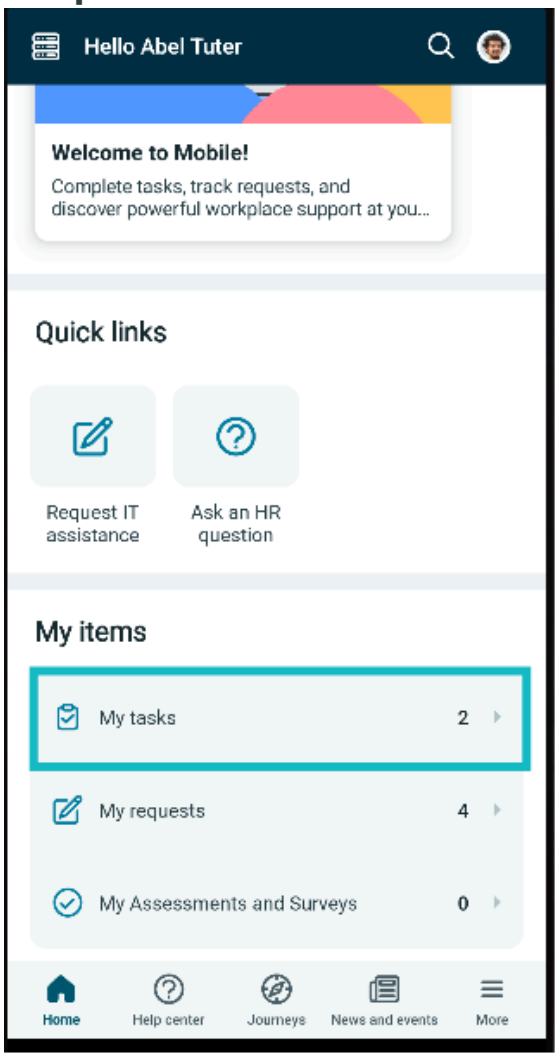
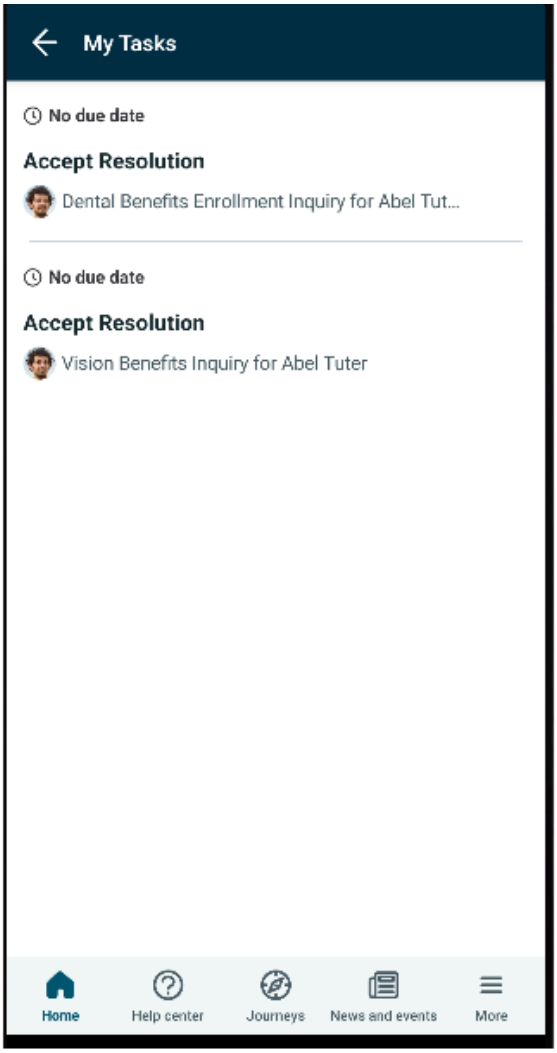
Employees can read knowledge articles and submit HR requests by navigating to the **Help center** tab and filtering by HR service.

Complete HR tasks





Employees can view their HR requests from the **Home** tab by selecting **My Tasks**. Supported task types include:

- HR tasks, such as signing electronic documents, uploading attachments, and watching videos.
- Lifecycle event tasks, including upcoming activities and rescind activities. See Lifecyle events for enterprise for more information on lifecycle events.
- Integration tasks, such as for the SuccessFactors, Docusign, or Adobe Acrobat Sign services. See HR Integrations for more information on third-party integrations.
- Content tasks. For more information, see Employee to-dos page.

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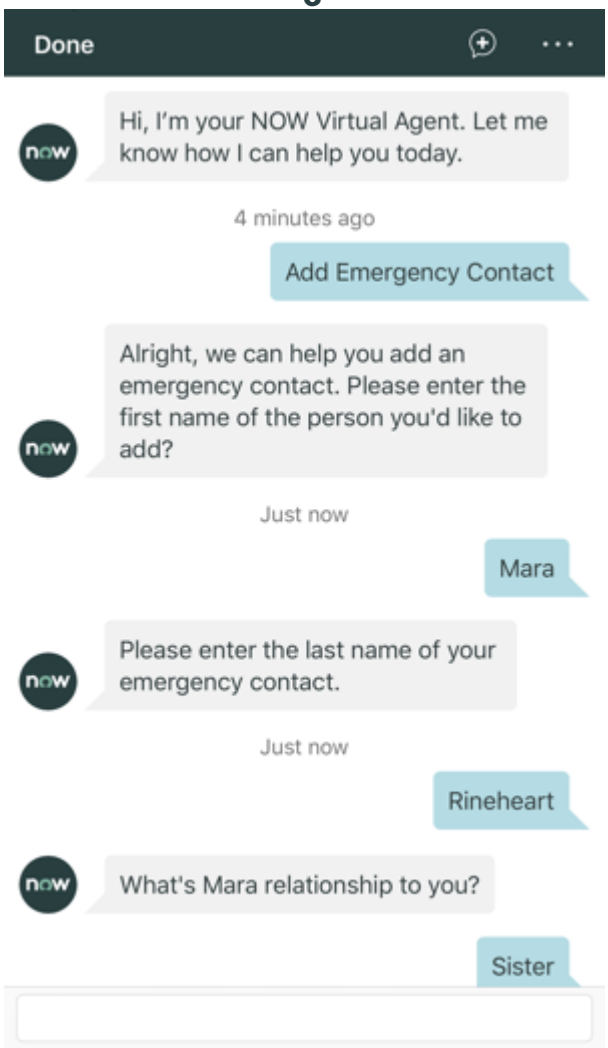
Chat with a virtual agent



If enabled, employees can chat with a virtual agent. See Enable Live Agent in the Now Mobile app for configuration details.

Activation information

HR Service Delivery for mobile is automatically activated when you activate Case and Knowledge Management. If it is not activated, you can manually activate HR Service Delivery for mobile.

Activate HR Service Delivery for mobile

Related topics

- Now Mobile app
- Now Mobile experience for Employee Center

Activate HR Service Delivery for mobile

Activate the HR Service Delivery for mobile plugin (sn_hr_mobile) if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin
Role required: admin

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About this task

HR Service Delivery for mobile activates these related plugins if they are not already active:

- Now Mobile app [sn_me]
- Surveys for mobile [com.sn_msc]

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Now Mobile for HR Service Delivery

Several types of components install with the activation of the Now Mobile for HR Service Delivery plugin, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature. Load demo data at the time of the plugin installation, or add the demo data using the repair feature for plugin installations. See Now Mobile app demo.

Note: The Now Mobile [sn_me] plugin activates the sn_hr_mobile.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only mobile admin user by requiring a minimum number (default is two) of active users with this role.

Roles installed

Roles installed with Now Mobile for HR Service Delivery

Role title [name]	Description	Contains roles
Now Mobile for HR admin [sn_hr_mobile.admin]		None

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Tables installed

Tables installed with Now Mobile for HR Service Delivery

Table	Description
Scripted Activity Set Context [v_st_hr_activity_set_context]	

Configurations for the Now Mobile app for HR Service Delivery

Configure options for the Now Mobile app for HR Service Delivery.

For more information on configuring the Now Mobile app for HR Service Delivery for:

- The For Me page
  - Greeting
  - My To-Dos
- My Requests
- Search
  - People search
    - Note: Customers that do not use the Employee Center (EC), the base system people search configuration is used. For more information, see Mobile search.
    - For information on AI Search, see Configure AI Search for mobile devices.
  - Analytics and suggestions
- Items and services
  - Catalog
  - Quick actions
- Knowledge
- Siri shortcuts

Please see Configurations for Now Mobile.

Administer Now Mobile

Configure the Now Mobile experience for your employees to enable them to access features from Lifecycle Events, Journey designer, and Agent Chat in their mobile devices.

Configure the different media sections to provide relevant content to new hires at different stages of the onboarding process. And you can enable chat so that new hires can chat with a live or virtual agent from within the app.

The following video provides an overview on how to configure the mobile onboarding.

Watch this video to learn how to configure and test the Mobile Onboarding app.

Configure a media section for Now Mobile

Configure one or more of the media sections for Now Mobile to provide relevant content to new hires at different stages of the onboarding process.

Before you begin

Role required: sn_hr_le.admin

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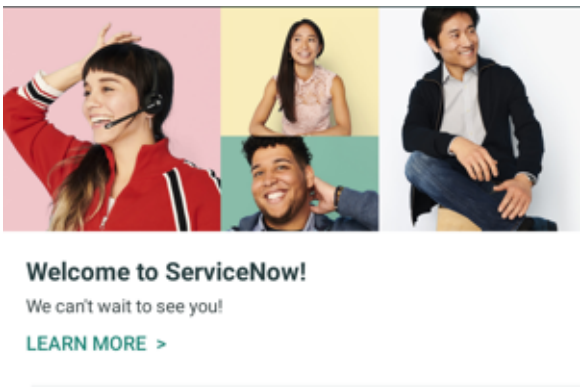
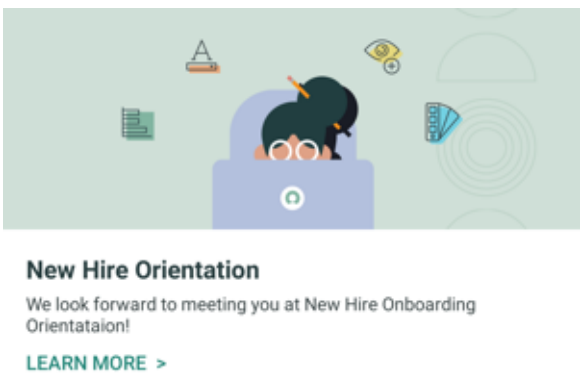
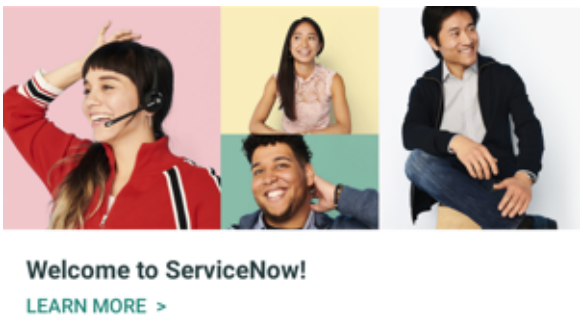
About this task

Media sections are a type of UI section that you can add to an applet launcher. The following media sections appear on the Welcome screen at different stages of the onboarding process, and you can personalize the content with your own headlines, images, video, text, and function instances.

Note: Beginning in the Paris release, media sections are not enabled by default for new customers.

Media sections in Now Mobile

	Welcome to ServiceNow (Before joining) Displays when the onboarding case is created until one day before the new hire's start date.
New Hire Orientation Displays beginning one day before the new hire's start state until their first day.	
	Welcome to ServiceNow (After joining) Displays beginning on the employee's start date until the onboarding case is complete.

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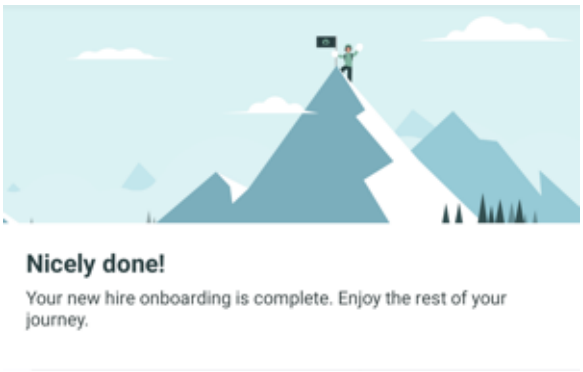
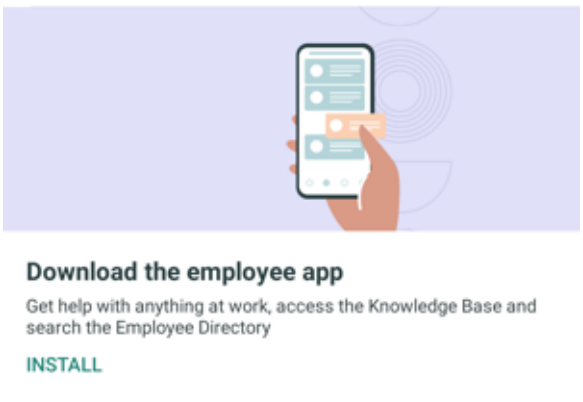
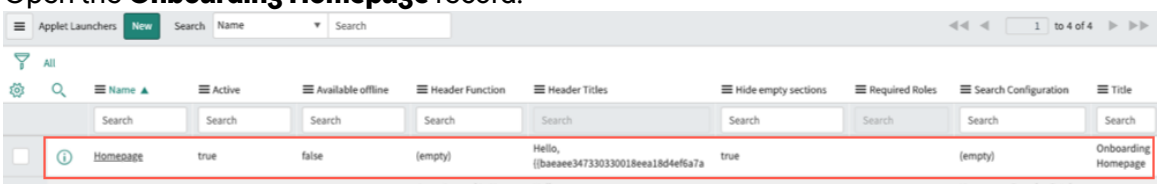
Media sections in Now Mobile (continued)

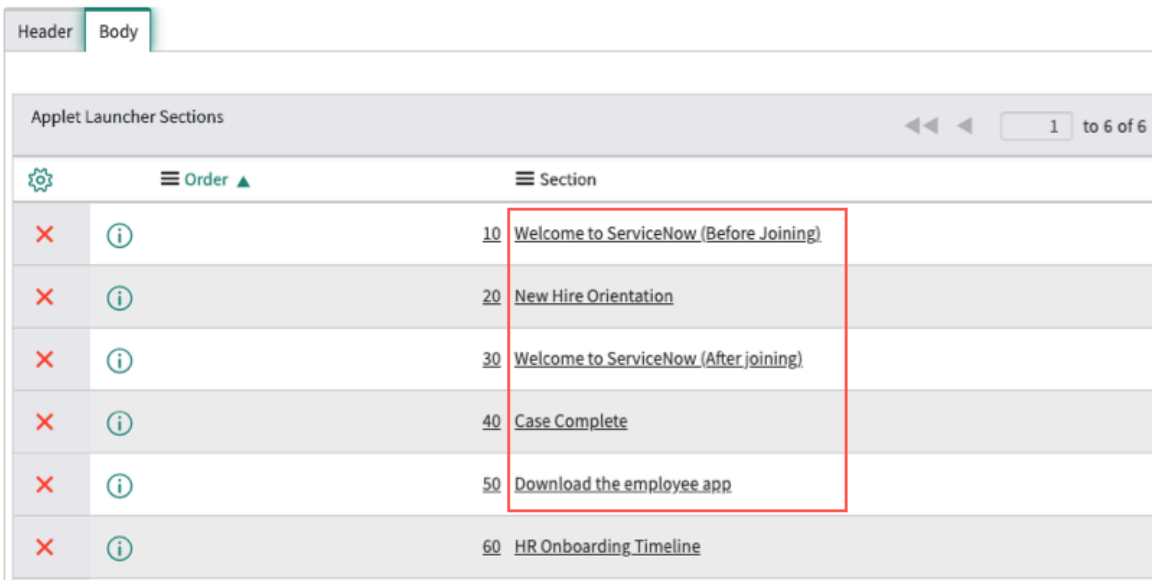
Case Complete Displays on the upper half of the Welcome screen after the onboarding case is complete.	
	Download the employee app Displays on the lower half of the Welcome screen after the onboarding case is complete.

Procedure

1. Navigate to **All** > **System Mobile** > **Applet Launcher**.
2. Open the **Onboarding Homepage** record.



3. In the Body related list, open a media section record.



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4. Configure the media section.
   You can personalize the headline, text, image/video, or function instance.
   - Headline
   - Text
   - Image or video
   - Function instance

   Note: You can personalize the label and configure the associated function. To learn more about how to configure functions, see Functions in ServiceNow mobile.

5. Click **Update**.

Enable Agent Chat in Now Mobile

Activate the Chat quick action so that your new hires can chat with a live or virtual agent.

Before you begin

Role required: sn_hr_le.admin

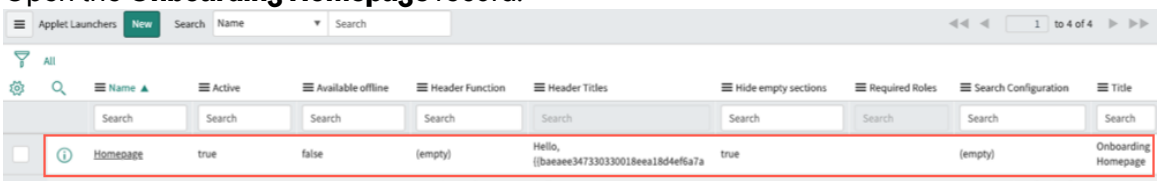
Make sure that live and/or virtual chat are set up for use in the Employee Service Center.

- Employee live chat overview
- Virtual Agent for HR Service Delivery

Role required: sn_hr_le.admin

Procedure

1. Navigate to **All** > **System Mobile** > **Applet Launchers**.
2. Open the **Onboarding Homepage** record.



3. In the Body related list, under the Quick Actions Menu Maps section, open the **Chat** record.

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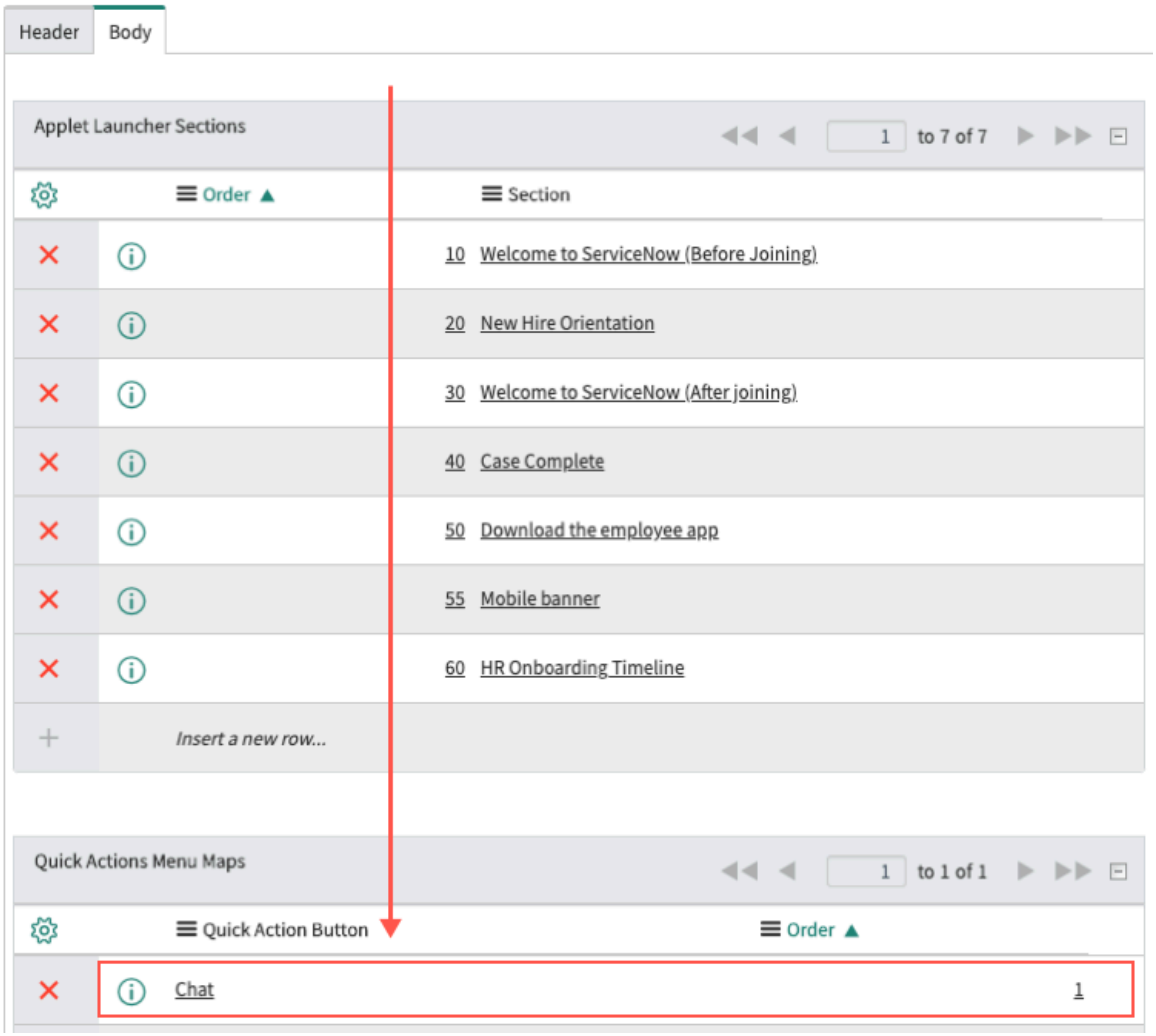

4. Select the **Active** option to activate the quick action for use.
5. Click **Update**.

Hiring manager experience for new hire onboarding

If you're using the Now Mobile app with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin, hiring managers can track the onboarding progress of their new hires in a single and consolidated section.

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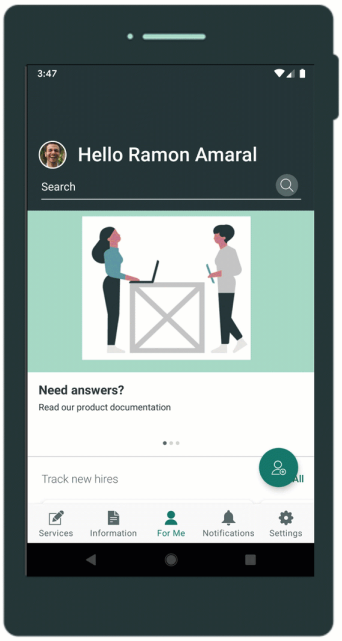

The hiring manager experience provides a consolidated view of all of the active onboarding cases of that manager's reports. The manager can drill down into each case form to view and complete their tasks, as well as track tasks that are overdue, view the timeline, and check for any case updates.

Important: For the hiring manager section to appear, the hiring manager must:

- Be the manager of the subject person of the onboarding case
- Be the opened for person on the onboarding case

Onboarding cases that are shown in the Track new hires section do not appear under the **My Requests** section. If there are no active cases, then the hiring manager section does not appear on the app.

To learn more about new hire onboarding and lifecycle events, see Lifecyle events for enterprise.

HR Multi Instance Integration

The ServiceNow® HR Multi Instance Integration centralizes the delivery of HR services in a shared services model, enabling consumers and providers to connect their instances to securely build business workflows across the ServiceNow ecosystem.

Get started

Explore	Configure
Learn about HR Multi Instance Integration features	Plan and configure your implementation

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Use	Reference
	
Provide a frictionless experience that makes it easy to raise and fulfill HR requests while giving end users the convenience of working in their own instance.	Get details about component like fields, tables, and properties.

Troubleshoot and get help

- Ask questions and explore other resources for HR Multi Instance Integration in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore HR Multi Instance Integration

Learn about the benefits and key offerings of the HR Multi Instance Integration application.

HR Multi Instance Integration overview

Partners and service providers for HR service fulfillment often are running their own instance of HR Service Delivery. HR Multi Instance Integration provides inter-instance communication and uniform HR service experiences (for remote HR services and local HR services) with fulfillment in different instances through the following capabilities:

- Ability to control your organization employee’s experience according to your organization's culture, branding, and policies.
- Ability to outsource services.
- Consistent user experience for employees across the entire HR catalog, regardless of whether they are interacting locally or remotely from any third-party provider.
- Because HR workflows or business process are not restricted to a single instance, they can flow seamlessly across instances. Ability to fulfill a case partially by providers and partially by consumers.

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- Uniformity and standardization for HR agents on the provider instance enables them to work on local cases or remote HR cases from the provider's ServiceNow AI Platform instance with a minimal learning curve.
- Managing and controlling access at the remote catalog level to meet security and compliance requirements at both the provider and consumer instances.
- Synchronization of relevant information such as submitted request (provider task) status, comments, and attachments by service providers.
- Use Universal Task as the remote tasking medium in consumer instance.
- Ability to create HR tasks and approval tasks for remote cases.
- Initiate document signing tasks for remote users via universal tasks.

Note: HR Multi Instance Integration is dependent on the following plugins:

- Service Bridge
- Human Resources Scoped App: Core

HR Multi Instance Integration users

Users on a provider instance

User	Description
Provider administrator	• Can register customers in a provider instance. • Can create and publish remote catalogs in a provider instance. • Can view records in transport queue in a provider instance. • Can Enable magic links to let consumer users complete assigned tasks from provider instance.
HR agent or Provider agent	• Can differentiate remote cases from local cases and work on it for basic case fulfillment in a provider instance. • Can create HR tasks, approval tasks, and document tasks for consumer users. • Can interact with consumer users via comments, attachments, and track state changes on the remote HR case on a provider instance.

Users on a consumer instance

User	Description
Consumer administrator	• Can register providers in a consumer instance. • Can subscribe to remote catalogs from external service provider. • Can activate catalogs to enable consumer employee to raise a request from consumer instance to provider instance.

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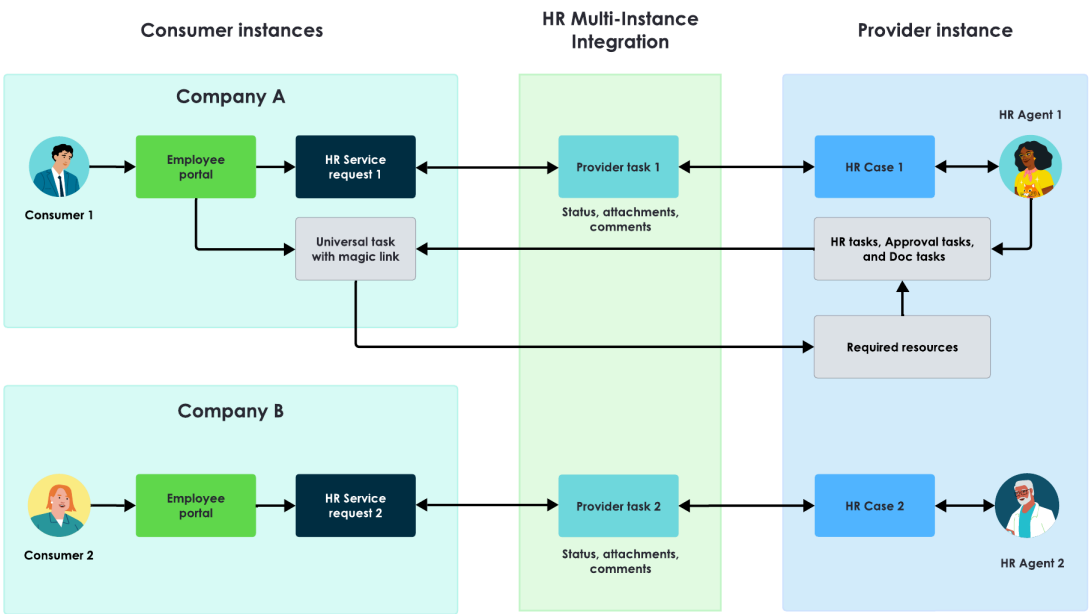
Users on a consumer instance (continued)

User	Description
	• Can view records in a transport queue in a consumer instance. • Can configure the value of the **Redirect timeout** option in the magic links settings.
Consumer employee	• Can access and submit service requests from a consumer employee portal. • Can complete the HR tasks, approval tasks, and document tasks via the URL links in assigned tasks.

HR Multi Instance Integration workflow

The following graphic explains how an HR service request is partially fulfilled by providers and partially fulfilled by consumers.

Flow



HR Multi Instance Integration benefits

Benefits for providers that are delivering HR services

Benefit	Users
HR workflows or business process are not restricted to single instance and can flow seamlessly across instances for fulfillment.	Provider
Restrict only users with specific roles to view records in provider instance.	Provider administrator

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Benefits for providers that are delivering HR services (continued)

Benefit	Users
Uniformity and standardization for HR agents on the provider instance enables them to work on local cases or remote HR cases from the provider's ServiceNow AI Platform instance with a minimal learning curve.	Provider agent
Create HR tasks, approval tasks, and document tasks for remote users.	Provider agent

Benefits for consumers that are availing third-party HR services

Benefit	Users
No need to maintain in-house expertise or agents for outsourced services (redundant and transactional in nature).	Consumer
HR workflows or business process are not restricted to single instance and can flow seamlessly across instances for fulfillment.	Consumer
Restrict only users with specific roles to view records in consumer instance.	Consumer administrator
Consistent user experience for employees across the entire HR catalog, regardless of whether they are interacting locally or remotely from any third-party provider. Place a request via an HR catalog from a consumer instance and fulfill the request from a provider instance. Complete HR tasks, approval tasks, and document tasks, if any, via magic links.	Consumer employee

What to explore next

To learn more about configuring and using HR Multi Instance Integration, see:

- Configuring HR Multi Instance Integration
- Using HR Multi Instance Integration
- Reference for HR Multi Instance Integration

Domain Separation guidelines for HR Multi Instance Integration

Review these domain separation guidelines before using the HR Multi Instance Integration application.

Note:

- Only Basic Domain separation (only data separation not process separation) is supported in HR Multi Instance Integration.
- Domain Separation is not mandatory for HR Multi Instance Integration. You can omit this section, if your organization doesn't require domain separation.

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Guidelines for HR Multi Instance Integration for Consumer

Install the Domain Separation plugin [com.snc.pa.domain_support] and Catalog Domain Separation plugin [com.glideapp.servicecatalog.domain_separation].

If you want the remote catalogs and provider tasks to be accessible by all employees across domains, maintain the provider connection and provider company in global.

If you want the remote catalogs and provider tasks to be accessible by specific domain users, maintain the provider connection and provider company in the required domain.

Guidelines for HR Multi Instance Integration for Provider

To enable domain separation in a provider instance, review the following guidelines:

- Install the Domain Separation plugin [com.snc.pa.domain_support] and Catalog Domain Separation plugin [com.glideapp.servicecatalog.domain_separation].

  Note: Define domains if you want to enable domain separation for each consumer, otherwise, omit the domain separation-specific setup.

- Associate a consumer company to a domain. Each consumer's Service Bridge connection record, consumer company, external system integrations connections, external system integration-related flows, and each consumer users must reside in the required domain (if domain separation is enabled).
- Associate the correct consumer company to users who are imported from external systems. The domain of a user is derived from a company record.
- Maintain the HR services and remote catalogs in global if the same service is used across all consumers. The HR services and HR catalogs can be maintained in a consumer-specific domain by creating the consumer-specific HR service and remote catalogs.

  Note: Provider tasks and remote HR cases reside in a consumer-specific domain when domain separation is enabled. The domain of an HR case is derived from the Service Bridge integrator-user's company domain for that consumer.

Configuring HR Multi Instance Integration

Plan and configure your implementation of HR Multi Instance Integration.

Configuration overview

1. Import users.
2. Configure HR Multi Instance Integration for Provider

   If you are a provider, plan and implement the configuration of HR Multi Instance Integration for Provider.

3. Configure HR Multi Instance Integration for Consumer

   If you are a consumer, plan and implement the configuration of HR Multi Instance Integration for Consumer.

Import users

Import users from consumer system of records into a provider instance.

Before you begin
Role required: admin

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Note: Set up the required ServiceNow integrations on your provider instance.

Procedure

1. Import users from consumer system of records (by methods supported by ServiceNow) to provider instance.
2. Associate the correct consumer company to the users who are imported into provider instance.

Configure HR Multi Instance Integration for Provider

Plan and implement the configuration of HR Multi Instance Integration for Provider.

Configuration overview

1. Activate the HR Multi Instance Integration for Provider application from ServiceNow Store, which installs the following plugins:
   - HR Multi Instance Integration Base
   - Service Bridge for Provider
   - Human Resources Scoped App: Core

   Note: In addition, you can also install ServiceNow Agent workspace for HR case management to enable agents to work on HR cases in provider instance.

2. Configure HR Multi Instance Integration for Provider by performing the following steps:

   a. Register a service bridge consumer. A company or account must exist for the consumer in the provider instance and user must be associated with the company. If you want to enable domain separation, you must associate a domain to the company. For more information, see Register a Service Exchange consumer.

   Note: Import users from a consumer instance into the provider instance before registering a service bridge consumer. For more information, see Import users.

   b. Create a remote record producer and publish it. For more information, see Remote catalogs.

   Note:
   - You can create remote record producers only if you have provider administrator [sn_hr_mii_provider] role along with a delegated_developer role.
   - Create a remote record producer under the HR Multi Instance Integration Base scope so that the catalogs are available on the consumer instance. After you revise a remote record producer, you must update the value in the **Record producer** field in HR service.
   - When creating remote record producers, select the flow **Create HR case from provider task**. This step is required for auto- creating an HR case from a provider task when the remote record producer is triggered.

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c. Enable magic links to let consumer users complete assigned tasks from provider instance. Magic links enable consumer users to directly access the linked resource in the provider instance without having to manually log in.

d. Configure an HR service to trigger a case when the remote record producer is triggered. When you create an HR service, select the configured remote record producer in the **Record producer** field. See Configure an HR service.

Activate HR Multi Instance Integration for Provider

You can install the HR Multi Instance Integration for Provider application if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Review the HR Multi Instance Integration for Provider application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with HR Multi Instance Integration for Provider:

- Plugins
- Store applications
- Roles

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the HR Multi Instance Integration for Provider application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure HR Multi Instance Integration for Consumer

Plan and implement the configuration of HR Multi Instance Integration for Consumer.

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Configuration overview

1. Activate the HR Multi Instance Integration for Consumer application from ServiceNow Store, which installs the following plugins:
   - HR Multi Instance Integration Base
   - Service Bridge for Consumer
   - Human Resources Scoped App: Core

   Note: In addition, you can also install ServiceNow Employee Center to enable employees to raise service requests via catalogs in Employee Center.

2. Configure HR Multi Instance Integration for Consumer by performing the following steps:

   a. Register a service bridge provider. For more information, see Connect to a provider.

   b. Activate remote record producers that the provider has published for your organization. For more information, see Activate a remote record producer in Service Exchange.

   c. Enable remote catalogs under the proper catalog category so that the remote catalogs are accessible to employees in the Employee portal. For more information, see Associate content from catalog categories to a topic.

   d. Create an HR service that will create a task type of Submit catalog with remote record producer.

Activate HR Multi Instance Integration for Consumer

You can install the HR Multi Instance Integration for Consumer application if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Review the HR Multi Instance Integration for Consumer application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with HR Multi Instance Integration for Consumer:

- Plugins
- Store applications
- Roles

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the HR Multi Instance Integration for Consumer application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Using HR Multi Instance Integration

Use HR Multi Instance Integration to place an HR service request from a consumer instance and fulfill it from a provider instance.

Overview of HR Multi Instance Integration for Provider

If you are a provider, review the following section:

1. Activate HR Multi Instance Integration for Provider

   As an admin, install the HR Multi Instance Integration for Provider application from ServiceNow store.

2. Configure HR Multi Instance Integration for Provider

   As a provider administrator, import users, create connections, set up remote catalog items, enable magic links, and configure HR service.

3. Using HR Multi Instance Integration for Provider

   As an agent in a provider instance, fulfill a remote HR request that is placed from a consumer instance.

Overview of HR Multi Instance Integration for consumer

If you are a consumer, review the following section:

1. Activate HR Multi Instance Integration for Consumer

   As an admin, install the HR Multi Instance Integration for Consumer application from ServiceNow store.

2. Configure HR Multi Instance Integration for Consumer

   As a consumer administrator, activate remote catalog items to make it visible on an employee portal for employees to place service requests. Restrict only users with specific roles to place remote requests.

3. Using HR Multi Instance Integration for Consumer

   As a consumer employee, you can raise a remote service request from a consumer employee portal to a provider instance.

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Limitations

To understand more about the general guidelines and limitations for HR Multi Instance Integration, see General guidelines and limitations.

Using HR Multi Instance Integration for Provider

Fulfill a remote HR service request that is placed from a consumer instance to a provider instance.

Before you begin
Role required: HR agent

Procedure

1. Review the remote HR case that is assigned to you.
   The remote HR case is created from an HR request placed from a consumer instance.

   Note: Transferring of cases, suspension of cases, and sharing of knowledge articles is not supported for the remote HR cases that are fulfilled in a provider instance.

2. To add an HR task for the remote HR case:
   a. In Related lists, click **Add task**. For more information, see Adding an HR task to an HR case.
   b. In the **Assigned to** field, specify the consumer user to whom you want to assign the task. A universal task of type URL is assigned to the consumer user.

   Note:

   A universal task is created only for consumer user, and not for local users on provider instance. The universal task is created only when the email ID of the consumer user matches in both provider and consumer instances.

3. To add an approval task for the remote HR case, click **Add an approval** in **Related lists**.
   For more information, see Add adhoc approvers to a case.

   Note:

   - Remote approval's universal tasks are triggered only when the email ID of the approval user matches in both provider and consumer instances.
   - The Add an approval option appears only when the **Agent can add an approval** option is configured in the HR service against which the remote case is created.

4. To initiate document signing tasks for the remote HR case:
   a. In the **Document template** field, select the configured document template.
   b. In **Assigned to** field, specify the HR agent on provider instance. The assigned HR agent can set a due date, modify the description, and short description of the document task. A universal task of type URL is assigned to the consumer user.

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Note:

- To initiate document tasks, the Document Templates plugin must be installed on the HR Multi Instance Integration for Provider application.

  For more information on how document tasks are initiated, see Document tasks generation.

- In the HR service additional information, Document template must be added in the **Service table** fields.

5. Request for any additional information from the consumer employee by adding comments or attachments to the case.
   The requested details are synchronized with the provider task in consumer instance. The consumer user can view the updates on their catalog request from Employee Portal.
6. Close the HR case when the all the tasks associated to it are complete.

Using HR Multi Instance Integration for Consumer

Access a remote catalog item (hosted by a remote service provider) and submit the catalog item with the required details from your Employee portal. An HR case is created in the provider instance which is fulfilled by a provider agent.

Before you begin

Role required: sn_sb.requestor

Procedure

1. Navigate to the consumer employee portal.
2. Select an HR catalog or catalog to place your request.
   This request triggers an approval flow (not a required flow) for your managerial approval. Once the HR request is approved by your manager, a provider task is created that in turn creates a remote HR case in provider instance.

   Note: You can access only the remote catalogs that have been enabled by your consumer administrator. See Configure HR Multi Instance Integration for Consumer for more information.

3. Review if any tasks are assigned to you.

   Note: To fulfill your HR request, an HR agent from provider instance can request for any additional information from you or can create some additional tasks for you to complete.

4. Select the URL link on the task that is assigned to you.
   Without having you to manually log in, the URL link gives you the access to linked resource in the provider instance for completing the task. After you complete the HR task in provider instance, your universal task is auto-closed in the consumer instance.

   Your HR request gets closed when the remote HR case is closed by the HR agent in provider instance.

Reference for HR Multi Instance Integration

Reference for HR Multi Instance Integration.

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Installed with HR Multi Instance Integration for Provider

Several types of components are installed with activation of the HR Multi Instance Integration for Provider plugin, including user roles.

Roles installed

List of roles assigned with HR multi instance integration for provider

Role title [name]	Description	Contains roles
HR Multi Instance Integration Provider Admin [sn_hr_mii_provider.admin]	Can connect with a consumer instance, create or update a remote record producer on provider instance, read or write provider tasks, create consumer criteria for remote access controls, and enable or disable magic links.	• sn_hr_mii_base.admin • sn_hr_mii_provider.user
HR Multi Instance Integration Provider User [sn_hr_mii_provider.user]	This role is used by the Create HR Case from Provider Task flow for creating a remote HR case from a provider task.	

Installed with HR Multi Instance Integration for Consumer

Several types of components are installed with activation of the HR Multi Instance Integration for Consumer plugin, including tables, user roles, and scheduled jobs.

Roles installed

List of roles assigned with HR multi instance integration for consumer

Role title [name]	Description	Contains roles
HR Multi Instance Integration Consumer Admin [sn_hr_mii_consumer.admin]	Can connect with the provider instance, enable a remote record producer and related properties on consumer instance, read or write provider tasks, add pre-approval flows, set the value of the **Redirect timeout** option in the magic links settings.	sn_hr_mii_base.admin

General guidelines and limitations

Review these general guidelines and limitations before using the HR Multi Instance Integration application.

See this KB1808151 .

Integration of HR Service Delivery with third-party systems

Extend HR Service Delivery capabilities by integrating with other third-party systems.

- HR Integrations
- Enterprise Service Management Integrations Framework
- HR Service Delivery Integration with Cornerstone OnDemand

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- HR Service Delivery Integration with Magnit
- HR Service Delivery Integration with Workday
- HR Service Delivery Advanced Integration with Workday
- HR Service Delivery integration with Oracle Cloud HCM
- HR Service Delivery Advanced Integration with Oracle HCM
- HR Service Delivery Integration with SuccessFactors
- HR Service Delivery with Ultimate Kronos Group
- Document Template integration with AdobeSign
- Document Template integration with Docusign
- Employee Relations integration with Navex Ethicspoint

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

HR Integrations

Integrate HR Service Delivery with HR management systems to synchronize employee profiles, to-dos, and other data; background check systems to request background checks; e-signature systems to request electronic signatures; and more.

For select systems, preconfigured integrations are available to use. You can also configure your own custom integration with third-party systems that use SOAP or REST services.

Important: Workday integration and SuccessFactors integration that were available with the HR Integrations [com.sn_hr_integrations] plugin have been deprecated. For Workday integration, you can use the HR Service Delivery Integration with Workday application, and for SuccessFactors integration, you can use the HR Service Delivery Integration with SuccessFactors application.

Preconfigured integrations

HR Service Delivery provides preconfigured integrations for the following third-party systems.

Preconfigured integration details

Third-party system	Preconfigured integration
Background check system	• Integrating with the First Advantage service • Integrating with the Accurate Background service • Integrating with the Sterling Talent Solutions service

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Preconfigured integration details (continued)

Third-party system	Preconfigured integration
E-signature system	• Integrating with the DocuSign service • Integrating with the Adobe Sign service
Tax form management system	Integrating with the CIC Plus service

Support and troubleshooting information

For information on HR Integrations support and troubleshooting, see the HR Integrations FAQs [KB0678031] article in the HI Knowledge Base.

Note: There are scenarios that are not supported in the initial integration, specifically when an employee is rehired or when an employee moves from contingent to full time.

Activation information

HR Integrations is automatically activated when you activate Case and Knowledge Management. If it is not activated, you can manually activate HR Integrations. For information on what components are installed with the application, see Components installed with HR Integrations.

Activate HR Integrations

You can activate Human Resources Scoped App: Integrations [com.sn_hr_integrations] if you have the admin role. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Role required: admin

About this task

Human Resources Scoped App: Integrations allows you to integrate HR Service Delivery with third-party systems.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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Components installed with HR Integrations

Several types of components install with the activation of the HR Integrations plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Human Resources Scoped App: Integrations [com.sn_hr_integrations] plugin activates the sn_hr_integrations.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only HR Integrations admin user by requiring a minimum number (default is two) of active users with this role.

Roles installed

Role properties and descriptions

Role Name	Description	Contains roles
HR integrations administrator [sn_hr_integrations.admin]	Can access and configure the HR Integrations application.	sn_hr_integrations.user
HR integrations user [sn_hr_integrations.user]	Can access and read data in the HR Integrations application.	None

Scheduled jobs installed

List of integration scheduled jobs

Scheduled Job	Description
Assign HR Client Roles for Integration Users Sync.	Assigns HR roles for integration users daily.
HR Integrations - External Interface Push Retry Job.	Retries data push to the third-party system on a periodic basis.
HR Integrations-Accurate Background Check Get Order Updates.	Gets background check order updates for the Accurate integration on a periodic basis.

Tables installed

List of integration tables installed

Table	Description
HR Integrations Additional Inputs	Table for additional inputs.

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List of integration tables installed (continued)

Table	Description
[sn_hr_integrations_additional_inputs]	
Background Check Package [sn_hr_integrations_background_check_package]	Table for background check packages.
HR Integrations Background Check Staging [sn_hr_integrations_background_check_staging]	Staging table for background checks.
HR Integrations Department Staging [sn_hr_integrations_dept_staging]	Staging table for departments.
HR Integrations External Interface [sn_hr_integrations_external_interface]	Table for HR external interfaces.
HR Integrations Job Profile [sn_hr_integrations_job_profile]	Staging table for job profiles.
HR Integrations Job Tracker [sn_hr_integrations_job_tracker]	Table for job trackers.
Leave Types [sn_hr_integrations_leave_type]	Table for leave types.
HR Integrations Location Staging [sn_hr_integrations_loc_staging]	Staging table for locations.
HR Integrations Outbound Schema Mapping [sn_hr_integrations_outbound_schema_mapping]	Table for HR outbound schema mappings.
HR Integrations Outbound Service [sn_hr_integrations_outbound_service]	Table for HR integration outbound services.
HR Integrations Outbound Service Trigger [sn_hr_integrations_outbound_service_trigger]	Table for outbound service trigger.

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List of integration tables installed (continued)

Table	Description
HR Integrations Schema Mapping [sn_hr_integrations_schema_mapping]	Table for HR schema mappings.
HR Integrations Service [sn_hr_integrations_service]	Table for HR integration services.
HR Integrations Service Job Tracker [sn_hr_integrations_service_job_tracker]	Table for service job trackers.
HR Integrations Service Mapping [sn_hr_integrations_service_mapping]	Table for HR service mappings.
HR Integrations Source [sn_hr_integrations_source]	Table for sources.
HR Integrations Source Properties [sn_hr_integrations_source_properties]	Table for source properties.
HR Integrations Source Version [sn_hr_integrations_source_version]	Table for source versions.
HR Integrations Staging [sn_hr_integrations_staging]	Core HR integrations staging table. **Note:** All HR integrations staging tables should be an extension of this core table.
HR Integrations Worker Profile [sn_hr_integrations_worker_profile]	Staging table for worker profiles, effective worker profiles, and future worker profiles.

Integrating with the First Advantage service

The preconfigured First Advantage integration uses SOAP services to request background checks through the First Advantage service. You can use the preconfigured integration as-is or customize it to meet your needs.

Important: Integrating with the First Advantage service is being prepared for deprecation. It will be hidden and unavailable for activation from Zurich, but will continue to be supported till Brazil. If you have an active subscription, you can still activate the plugin by submitting a plugin activation request. For more details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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First Advantage integration overview

The First Advantage integration is configured to request background checks as follows.

- The HR agent creates a case to request a background check through the First Advantage service.
- The First Advantage service evaluates the request to:
  - Update the case with the background check applicant ID and status.
  - Create a task, as well as send an email, for the employee to sign up and complete a background check application through the First Advantage website.
- Once the employee completes the task, the First Advantage service performs the background check.
- When the background check is complete, the First Advantage service updates the case with the background check status and details.

First Advantage integration setup

To set up the First Advantage integration, you must provide the source credentials, verify the integration settings, and add the appropriate background check packages. Once the integration is complete, you can request background checks through the First Advantage service.

Provide source credentials for the First Advantage service

Provide the source and SOAP credentials for the First Advantage service so that it can be accessed for integration.

Before you begin

Role required: sn_hr_integrations.admin

So the First Advantage service can be accessed for integration, you must provide:

- SOAP credentials, including the endpoint URL, user name, and password
- Parent account
- Account
- Requestor email address

Procedure

1. Navigate to **All** > **HR Integrations** > **Sources**.
2. Open the **First Advantage** record.
3. In the **SOAP credentials** related list, provide the SOAP credentials to use with your integration.

HR SOAP credentials related list form fields

Field	Description
Endpoint URL	Unique endpoint URL provided by the third-party system.

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Field	Description
	Note: ○ The default value is a placeholder URL only. Make sure to replace it with the unique endpoint URL that you get from your third-party provider. ○ Data that is transferred between the customer instance and the third-party system is secured through standard SSL. For a secure connection, provide an encrypted HTTPS link.
Inbound Username	User name for inbound data pull.
Inbound Password	Password for inbound user name. **Note:** You must enter an explicit value for this field. The value you enter is encrypted with the key for the instance, so values imported from other instances using XML files or update sets do not work.
Outbound Username	User name for outbound data push.
Outbound Password	Password for outbound user name. **Note:** You must enter an explicit value for this field. The value you enter is encrypted with the key for the instance, so values imported from other instances using XML files or update sets do not work.

4. Right-click the form header and click **Save**.
5. In the **HR Integrations Additional Inputs** related list, provide the value for each key.
   - parent_account
   - account
   - requestor_email_address
6. In the **HR integrations source properties** related list, you can turn on or off the following source properties.

Property	Description
sn_hr_integrations.debug	Enables the debug log to display responses from the third-party system. Turn on to troubleshoot and debug the integration on an as-needed basis. ○ Type: true or false ○ Default value: false ○ Location: Navigate to **HR Integrations** > **Logs** to view the development logs.

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Verify integration for the First Advantage service

The integration is configured to push background check data between the HR service in HR Service Delivery and the First Advantage service. You can verify the preconfigured settings and determine whether they meet your needs or if further customization is required.

Before you begin

Role required: sn_hr_integrations.admin

Procedure

1. Verify the HR service mapping, which maps the HR service to the HR web service.
   a. Navigate to **HR Integrations** > **HR Service Mapping**.
   b. Right-click the **HR external source** column and select **Group By HR external source**.
   c. For the **First Advantage** group, click the arrow to expand the list.
   For each record, click the information icon to verify that the HR service is correctly mapped to the appropriate HR web service.

   HR service mapping

HR service mapping	HR service	HR web service
First Advantage - Request Background Check by First Advantage	Request Background Check by First Advantage	First Advantage Web Service

2. Verify the HR outbound schema mappings.
   a. Navigate to **HR Integrations** > **HR Outbound Schema Mapping**.
   b. Right-click the **Source Table** column and select **Group By Source Table**.
   c. For the HR Talent Management Case [sn_hr_core_case_talent_management] group, click the arrow to expand the list.
   d. Click the information icon for each First Advantage record to verify that the data fields from the source tables are correctly mapped to the appropriate fields in First Advantage.
3. Verify the HR schema mappings.
   a. Navigate to **HR Integrations** > **HR Schema Mapping**.
   b. Right-click the **Source** column and select **Group By Source**.
   c. For the **First Advantage** group, click the arrow to expand the list.
   d. For each record, click the information icon to verify that the data fields from First Advantage are correctly mapped to the appropriate fields in the staging tables.
4. Verify the HR transform maps.

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a. Navigate to **HR Integrations** > **HR Transform Maps**.

b. In the **Table Transform Maps** list, verify that the staging tables are correctly mapped to the appropriate target tables.

Staging table mapping

Staging table	Target table
HR Integrations Background Check Staging [sn_hr_integrations_background_check_staging]	HR Talent Management Case [sn_hr_core_case_talent_management]

Add background check packages for the First Advantage

Add one or more background check packages to your instance so they can be accessed when a request for a background check by First Advantage is made. For example, you can add a package for a background check only and a package for both a background check and drug screening.

Before you begin

A background check package is a set of activities that are defined by the third-party system to be included in a background check. You can have a package for a background check only, a package for both a background check and drug screening, and so on. For each background check package, you must provide:

- Package ID
- Package name
- Package description

Role required: sn_hr_integrations.admin

Procedure

1. Navigate to **HR Integrations** > **Background Check Package**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Background Check Package form

Field	Description
Package ID	ID of the background check package.
Package name	Name of the background check package.
Description	Description of the background check package.
Source	Name of the third-party background check system.

4. Click **Submit** or **Update**.

What to do next

.

Related topics

Provide source credentials for the First Advantage service

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Integrating with the Accurate Background service

The preconfigured Accurate Background integration uses REST services to request background checks through the Accurate Background service. You can use the preconfigured integration as-is or customize it to meet your needs.

Important: Integrating with the Accurate Background service is being prepared for deprecation. It will be hidden and unavailable for activation from Zurich, but will continue to be supported till Brazil. If you have an active subscription, you can still activate the plugin by submitting a plugin activation request. For more details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Accurate integration overview

The Accurate integration is configured to request background checks as follows.

- The HR agent creates a case to request a background check through the Accurate service.
- The Accurate service evaluates the request to:
  - Update the case with the background check applicant ID and status.
  - Send an email to the employee with a link to sign up and complete a background check application through the Accurate website.
- Once the employee completes the background check application, the Accurate service performs the background check.
- When the background check is complete, the Accurate service will update the case with the background check status and details.

Accurate integration setup

To set up the Accurate integration, you must provide the source credentials, verify the integration settings, and add the appropriate background check packages. Once the integration is complete, you can request background checks through the Accurate service.

Provide source credentials for the Accurate service

Provide the source and REST credentials for the Accurate service so that it can be accessed for integration.

Before you begin

Role required: sn_hr_integrations.admin

So the Accurate service can be accessed for integration, you must provide:

- REST credentials, including the endpoint URL, user name, and password

Procedure

1. Navigate to **All** > **HR Integrations** > **Sources**.
2. Open the **Accurate Background Check** record.
3. In the **REST credentials** related list, provide the Basic authentication profile credentials to use with your integration.

Important: In the corresponding HR REST service, you must provide the unique endpoint URL that you get from your third-party provider.

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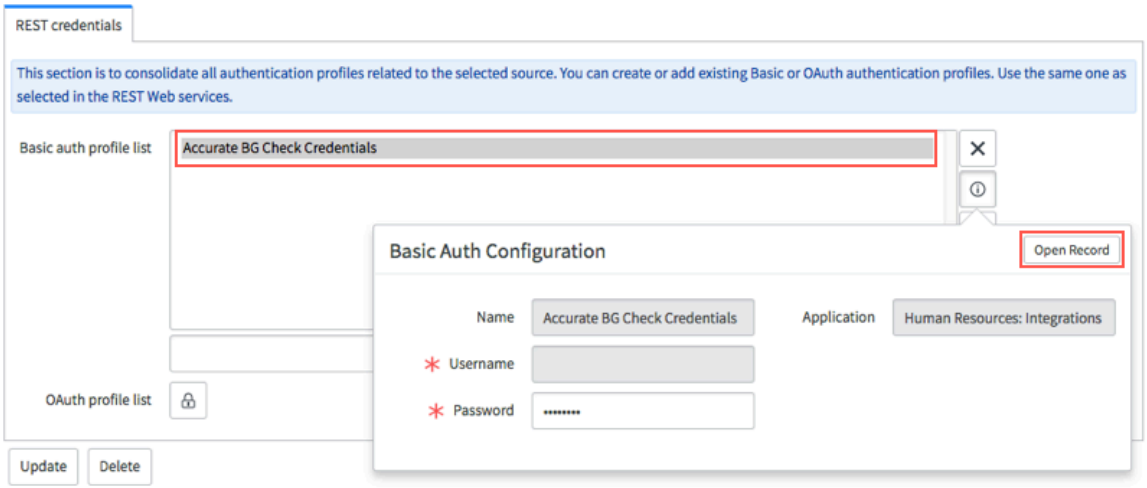
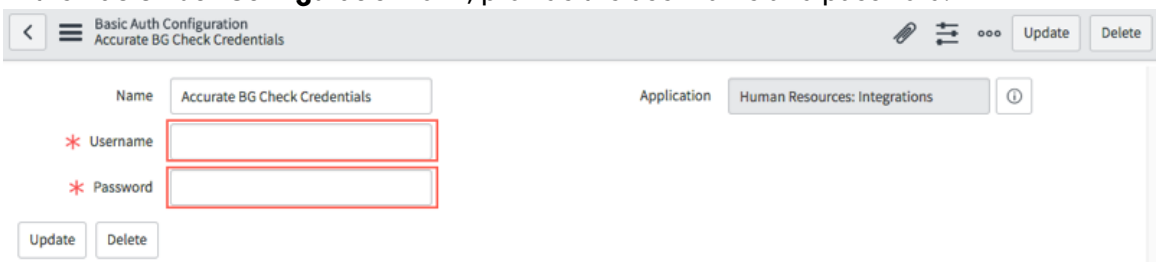
a. In the **Basic auth profile list** field, click the **Unlock** icon.

b. Select the **Accurate BG Check Credentials** profile, and then click **Preview** and open the record.



c. In the **Basic Auth Configuration** form, provide the user name and password.



d. Click **Update**.

4. Right-click the form header and click **Save**.

5. In the **HR integrations source properties** related list, you can turn on or off the following source properties.

Properties for Accurate services

Property	Description
sn_hr_integrations.debug	Enables the debug log to display responses from the third-party system. Turn on to troubleshoot and debug the integration on an as-needed basis. ○ Type: true or false ○ Default value: false ○ Location: Navigate to **HR Integrations** > **Logs** to view the development logs.

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Verify integration for the Accurate service

The integration is configured to push background check data between the HR service in HR Service Delivery and the Accurate service. You can verify the preconfigured settings and determine whether they meet your needs or if further customization is required.

Before you begin

Role required: sn_hr_integrations.admin

Procedure

1. Verify the HR service mappings, which maps the HR service or HR integration outbound services to the HR web services.
   a. Navigate to **HR Integrations** > **HR Service Mapping**.
   b. Right-click the **HR external source** column and select **Group By HR external source**.
   c. For the **Accurate** group, click the arrow to expand the list.
   d. For each record, click the information icon to verify that the HR service or HR integration outbound services are correctly mapped to the appropriate HR web services.

      Note: Make sure to verify the endpoint URL for the **Accurate Background Check API** record.

HR service mapping

HR service mapping	HR service or HR integration outbound service	HR web service
Accurate Background Check - Accurate Background Check - Get Order Updates	Accurate Background Check - Get Order Updates	Accurate Background Check API
Accurate Background Check - Accurate Background Check - Get Report Data	Accurate Background Check - Get Report Data	Accurate Background Check API
Accurate Background Check - Accurate Background Check - Place Order	Accurate Background Check - Place Order	Accurate Background Check API
Accurate Background Check - Request Background Check by Accurate	Request Background Check by Accurate	Accurate Background Check API

2. Verify the HR outbound schema mappings.
   a. Navigate to **HR Integrations** > **HR Outbound Schema Mapping**.
   b. Right-click the **Source Table** column and select **Group By Source Table**.
   c. For the HR Talent Management Case [sn_hr_core_case_talent_management] group, click the arrow to expand the list.
   d. Click the information icon for each Accurate record to verify that the data fields from the source tables are correctly mapped to the appropriate fields in Accurate.
3. Verify the HR schema mappings.

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a. Navigate to **HR Integrations** > **HR Schema Mapping**.

b. Right-click the **Source** column and select **Group By Source**.

c. For the **Accurate** group, click the arrow to expand the list.

d. For each record, click the information icon to verify that the data fields from Accurate are correctly mapped to the appropriate fields in the staging tables.

4. Verify the HR transform maps.

a. Navigate to **HR Integrations** > **HR Transform Maps**.

b. In the **Table Transform Maps** list, verify that the staging tables are correctly mapped to the appropriate target tables.

Staging table mapping

Staging table	Target table
HR Integrations Background Check Staging [sn_hr_integrations_background_check_staging]	HR Talent Management Case [sn_hr_core_case_talent_management]

Add background check packages for the Accurate service

Add one or more background check packages to your instance so they can be accessed when a request for a background check by Accurate is made. For example, you can add a package for a background check only and a package for both a background check and drug screening.

Before you begin

A background check package is a set of activities that are defined by the third-party system to be included in a background check. You can have a package for a background check only, a package for both a background check and drug screening, and so on. For each background check package, you must provide:

- Package ID
- Package name
- Package description

Role required: sn_hr_integrations.admin

Procedure

1. Navigate to **HR Integrations** > **Background Check Package**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Background Check Package form

Field	Description
Package ID	ID of the background check package.
Package name	Name of the background check package.
Description	Description of the background check package.

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Field	Description
Source	Name of the third-party background check system.

4. Click **Submit** or **Update**.

What to do next

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Related topics

Provide source credentials for the Accurate service

Integrating with the Sterling Talent Solutions service

The preconfigured Sterling Talent Solutions integration uses REST services to request background checks through the Sterling service. You can use the preconfigured integration as-is or customize it to meet your needs.

Important: Integrating with the Sterling Talent Solutions service is being prepared for deprecation. It will be hidden and unavailable for activation from Zurich, but will continue to be supported till Brazil. If you have an active subscription, you can still activate the plugin by submitting a plugin activation request. For more details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Sterling integration overview

The Sterling integration is configured to request background checks as follows.

- The HR agent creates a case to request a background check through the Sterling service.
- The Sterling service evaluates the request to:
  - Update the case with the background check order ID.
  - Send an email to the employee with a link to sign up and complete a background check application through the Sterling website.
- Once the employee completes the background check application, the Sterling service performs the background check.
- When the background check is complete, the Sterling service will update the case with the background check status and details.

Sterling integration setup

To set up the Sterling integration, you must provide the source credentials, verify the integration settings, and add the appropriate background check packages. Once the integration is complete, you can request background checks through the Sterling service.

Provide source credentials for the Sterling service

Provide the source and REST credentials for the Sterling service so that it can be accessed for integration.

Before you begin

Role required: sn_hr_integrations.admin

So the Sterling service can be accessed for integration, you must provide:

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- REST credentials, including the endpoint URL
- user_id
- client_reference_id
- integration_id
- password
- account

Procedure

1. Navigate to **All** > **HR Integrations** > **Sources**.
2. Open the **Sterling Background Check** record.
3. In the **REST credentials** related list, do not provide the credentials to use with your integration. Instead, you must provide those credentials in the **HR Integrations Additional Inputs** related list.

   Important: In the corresponding HR REST service, you must provide the unique endpoint URL that you get from your third-party provider.

4. Right-click the form header and click **Save**.
5. In the **HR Integrations Additional Inputs** related list, provide the value for each key.
   - user_id
   - client_reference_id
   - integration_id
   - password
   - account
6. In the **HR integrations source properties** related list, you can add the following source property.

Source property descriptions

Property	Description
sn_hr_integrations.debug	Enables the debug log to display responses from the third-party system. Turn on to troubleshoot and debug the integration on an as-needed basis. ○ Type: true or false ○ Default value: false ○ Location: Navigate to **HR Integrations** > **Logs** to view the development logs.

Verify integration for the Sterling service

The integration is configured to push background check data between the HR service in HR Service Delivery and the Sterling service. You can verify the preconfigured settings and determine whether they meet your needs or if further customization is required.

Before you begin

Role required: sn_hr_integrations.admin

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Procedure

1. Verify the HR service mappings, which maps the HR service to the HR web service.
   a. Navigate to **HR Integrations** > **HR Service Mapping**.
   b. Right-click the **HR external source** column and select **Group By HR external source**.
   c. For the **Sterling** group, click the arrow to expand the list.
   d. For each record, click the information icon to verify that the HR service is correctly mapped to the appropriate HR web service.

      Note: Make sure to provide the endpoint URL for the **Sterling Background Check API** record.

      HR service mapping

HR service mapping	HR service	HR web service
Sterling Background Check - Request Background Check by Sterling	Request Background Check by Sterling	Sterling Background Check API

2. Verify the HR outbound schema mappings.
   a. Navigate to **HR Integrations** > **HR Outbound Schema Mapping**.
   b. Right-click the **Source Table** column and select **Group By Source Table**.
   c. For the HR Talent Management Case [sn_hr_core_case_talent_management] group, click the arrow to expand the list.
   d. Click the information icon for each Sterling record to verify that the data fields from the source tables are correctly mapped to the appropriate fields in Sterling.
3. Verify the HR schema mappings.
   a. Navigate to **HR Integrations** > **HR Schema Mapping**.
   b. Right-click the **Source** column and select **Group By Source**.
   c. For the **Sterling** group, click the arrow to expand the list.
   d. For each record, click the information icon to verify that the data fields from Sterling are correctly mapped to the appropriate fields in the staging tables.
4. Verify the HR transform maps.
   a. Navigate to **HR Integrations** > **HR Transform Maps**.
   b. In the **Table Transform Maps** list, verify that the staging tables are correctly mapped to the appropriate target tables.

      Staging table mapping

Staging table	Target table
HR Integrations Background Check Staging [sn_hr_integrations_background_check_staging]	HR Talent Management Case [sn_hr_core_case_talent_management]

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Add background check packages for the Sterling service

Add one or more background check packages to your instance so they can be accessed when a request for a background check by Sterling is made. For example, you can add a package for a background check only and a package for both a background check and drug screening.

Before you begin

A background check package is a set of activities that are defined by the third-party system to be included in a background check. You can have a package for a background check only, a package for both a background check and drug screening, and so on. For each background check package, you must provide:

- Package ID
- Package name
- Package description

Role required: sn_hr_integrations.admin

Procedure

1. Navigate to **HR Integrations** > **Background Check Package**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Background Check Package form

Field	Description
Package ID	ID of the background check package.
Package name	Name of the background check package.
Description	Description of the background check package.
Source	Name of the third-party background check system.

4. Click **Submit** or **Update**.

What to do next

.

Related topics

Provide source credentials for the Sterling service

Integrating with the DocuSign service

Request electronic signatures through the DocuSign service with the DocuSign integration.

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Important:

Starting with the Australia release, HR Document Templates is being prepared for future deprecation. It will be hidden and no longer activated on new instances, but will continue to be supported.

Use Document Templates and Document Template integration with Docusign that provide the latest experience for this functionality. For migration guidelines, see Migrating from HR Document Templates to Document Templates.

For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

This integration depends on the DocuSign spoke in IntegrationHub, and is enabled for the signing of ad hoc documents (HR PDF document templates) and DocuSign templates. A preconfigured HR service, flow, and HR case template for both the ad hoc document flow and DocuSign template flow are available to use.

DocuSign spoke

The DocuSign integration depends on the DocuSign spoke in IntegrationHub. Before you begin, an admin must have set up the DocuSign spoke, including registering as an OAuth provider and creating credential and connection records. You must also synchronize DocuSign with your ServiceNow instance.

- Set up DocuSign spoke. See Docusign eSignature Spoke.
- Sychronize DocuSign with ServiceNow

Note:

- You must synchronize each time you need to get new or updated DocuSign templates. To synchronize, navigate to **DocuSign** > **Accounts** and click the **Get Accounts** related link.
- If your organization has more than one DocuSign account, the ad hoc document flow uses the first available account.

DocuSign integration setup

Once the DocuSign spoke is set up and synchronized, you can configure the integration for HR. Depending on whether the user is signing an ad hoc document (HR PDF document template) or a DocuSign template, the integration has two flows that you can use. For each document that you want to make available for signing through the DocuSign service, configure as follows.

DocuSign integration configuration requirements

Flow	Configuration requirements
Ad hoc document flow	1. Create a managed document that you want to make available for signing. See Managed Documents for more information. 2. Configure an HR PDF document template for an ad hoc document 3. Configure an HR service for the DocuSign integration

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DocuSign integration configuration requirements (continued)

Flow	Configuration requirements
DocuSign template flow	1. Create a DocuSign template that you want to make available for signing. See the DocuSign eSignature User Guide for more information. 2. Configure an HR PDF document template for a DocuSign template 3. Configure an HR service for the DocuSign integration

The ad hoc document flow is for the signing of static documents that originate from a managed document in the ServiceNow system. Each ad hoc document is configured as a standard HR PDF document template. You can add signers to the document with **Mark Signatures**, and then map each signature field to an appropriate user field in a table. (The positioning of the markings are not used, and the DocuSign integration allows the signer to sign anywhere in the document.) You can also parse the PDF to map document fields to corresponding table fields to auto-populate the document when it is generated for signing. The generated document is static, which means that it is read-only and the signatory cannot update any of the fields.

The DocuSign template flow is for the signing of dynamic documents that originate from the DocuSign system. Each DocuSign template is brought into the ServiceNow system, and then configured into an HR PDF document template to enable mappings. You must map each signature field from the DocuSign template to an appropriate user field in a table. You can also map fields from the DocuSign template to corresponding table fields to auto-populate the document for signing. The generated document is dynamic, which means that the signatory can write in editable fields, such as to update an address or provide W-4 information. However, any updates made are saved to the document only. They are not mapped back to the source table.

Requesting electronic signatures through the DocuSign service

Once the integration setup is complete, HR agents from your organization can request electronic signatures through the DocuSign service.

For more information, see Request an electronic signature through the Docusign service.

Configure an HR PDF document template for an ad hoc document

If you are using the DocuSign integration, configure an HR PDF document template for each ad hoc document that you want to make available for signing.

Before you begin

Create the managed document that you want to make available for signing through the DocuSign system. See Managed Documents for more information.

Role required: sn_hr_core.admin

You can use an existing or create a new HR PDF document template. You can add signers to the document with **Mark Signatures**, and then map each signature field to an appropriate user field in a table. You can also parse the PDF to map document fields to corresponding table fields to auto-populate the document when it is generated for signing. As part of the DocuSign integration only, you can also enable serial signing for documents that require multiple signers.

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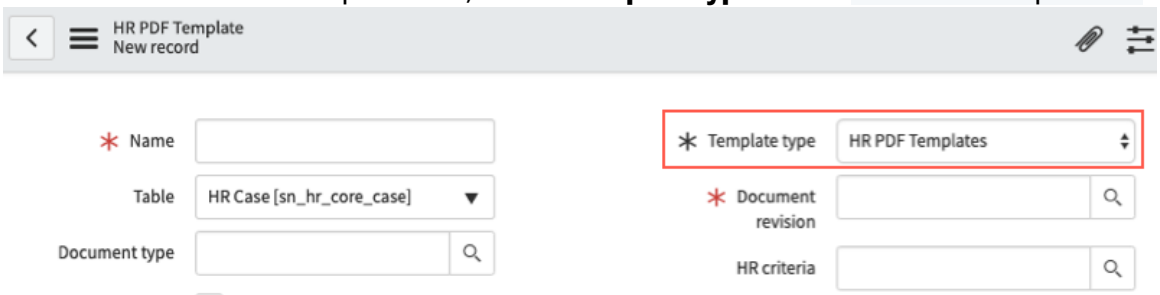
Procedure

1. Navigate to **All** > **HR Administration** > **Document Templates**.
2. Click **New** or open a record

   Note: If you are creating a new record, make sure to select **PDF Document Template**.

3. On the PDF Document Template form, set the **Template type** field to `HR PDF Templates`.



4. Configure the HR PDF document template, as appropriate.
   You can add signers to the document with **Mark Signatures**, and then map each signature field to an appropriate user field in a table. You can also parse the PDF to map document fields to corresponding table fields to auto-populate the document when it is generated for signing. For further details on configuring an HR PDF document template, see .

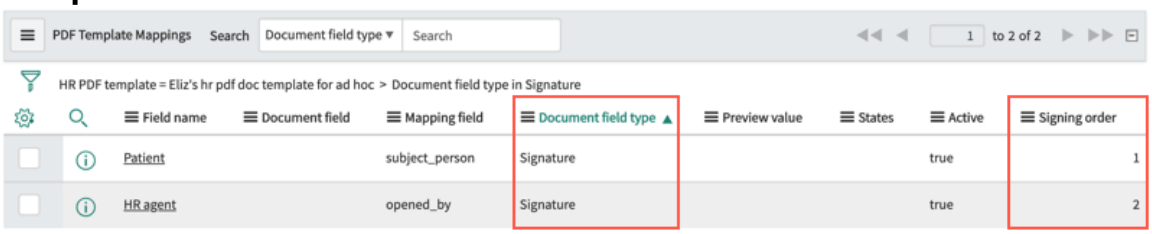
   Note: The positioning of **Mark Signatures** is not used, and the integration allows the signer to sign anywhere in the document.

5. If you want to enable serial signing for documents that require multiple signers, assign the signing order for each signature field in the PDF Template Mappings section.

   Note:

   - By default, if a document has two or more signature fields, parallel signing is enabled.
   - If the **Signing order** column is not visible, click the gear icon to personalize the list columns. Add the **Signing order** field to the Selected column.

Example



6. Click **Update**.

Configure an HR PDF document template for a DocuSign template

If you are using the DocuSign integration, configure an HR PDF document template for each DocuSign template that you want to make available for signing.

Before you begin

Create the DocuSign template that you want to make available for signing through the DocuSign system. See the DocuSign eSignature User Guide for more information. You must also synchronize your accounts to bring the DocuSign template (and any other new or updated

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templates) into the ServiceNow system. See Synchronize Docusign with ServiceNow for more information.

Note: Each DocuSign template must have one associated document. Multiple documents per template are not supported.

Role required: sn_hr_core.admin

About this task

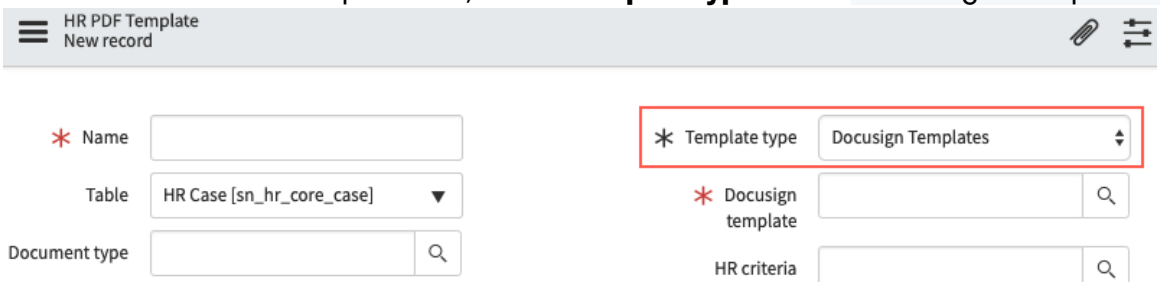
You must map each signature field from the DocuSign template to an appropriate user field in a table. You can also map fields from the DocuSign template to corresponding table fields to auto-populate the document when it is generated for signing.

Procedure

1. Navigate to **All** > **HR Administration** > **Document Templates**.
2. Click **New** or open a record.

   Note: If you are creating a new record, make sure to select **PDF Document Template**.

3. On the PDF Document Template form, set the **Template type** field to `DocuSign Template`.



4. Fill in the fields on the form, as appropriate.

HR PDF Template form

Field	Description
Name	Name of the HR document template.
Table	HR table that the HR document template is associated with.
Document type	Document type that the HR document template is categorized under.
Active	Option to activate the HR document template for use.
Template type	Set the value to `DocuSign Template`.
DocuSign template	Select the DocuSign template to use. **Note:** You must synchronize each time you need to get new or updated DocuSign templates. To synchronize, navigate to **DocuSign** > **Accounts** and click the **Get Accounts** related link. See Synchronize Docusign with ServiceNow for more information.
HR criteria	Defines the conditions that the subject person of an HR case must meet for an HR agent to be able to access the HR document template on their behalf.

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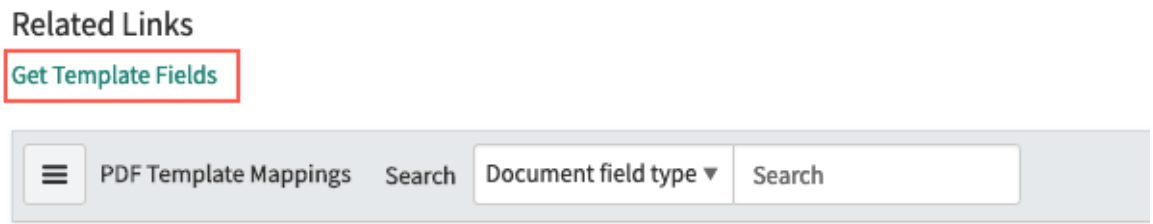
Field	Description
	Note: When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

5. Right-click on the form header and click **Save**.
   The **Get template fields status** field, **Get Template Fields** related link, and PDF Template Mappings section displays.
6. Click the **Get Template Fields** related link.

   Note: If any changes are made to the signature or document fields on the DocuSign template, you must click the **Get Template Fields** related link to synchronize those changes. Existing mappings are not affected.



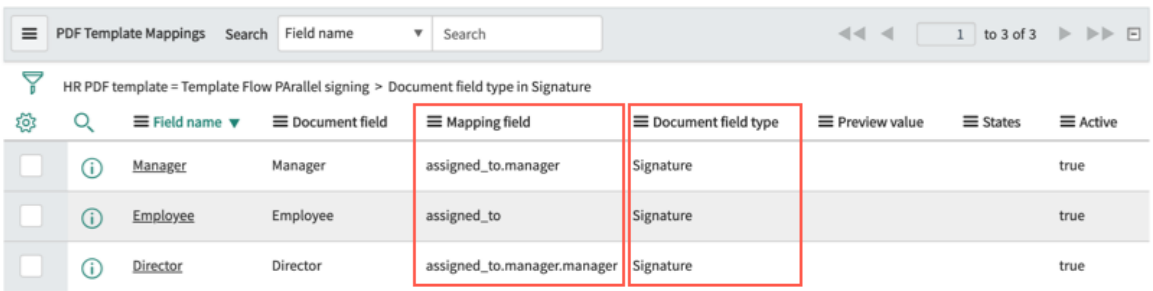
7. When the **Get template fields status** field changes to **Completed**, reload the form.

   Note: If you are using a Safari browser, you must reload the form to see the changed state.

   In the **PDF Template Mappings** section, a list of the mappable fields displays.
8. In the **PDF Template Mappings** section, you must map each signature field from the DocuSign template to an appropriate user field in a table.

   Note: Configuration of the signature fields, including for parallel and serial signing, must be completed within the DocuSign system. You cannot add or configure the signature fields from within the HR PDF document template.

Example



9. In the **PDF Template Mappings** section, you can also map fields from the DocuSign template to corresponding table fields to auto-populate the document when it is generated for signing.

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Note:

- Make sure that the data type of the DocuSign field matches that of the table field.
- Mapping is not supported for the following DocuSign field types:
  - Initial
  - Date signed
  - Payment item
  - Formula
  - Attachment
  - Note
  - Approve
  - Decline

10. Click **Update**.

Configure an HR service for the DocuSign integration

Create or modify an HR service to request electronic signatures through the DocuSign service. Preconfigured flows to collect signatures for either an ad hoc document (HR PDF document template) or a DocuSign template are available to use. You must also configure an associated HR case template to set a default ad hoc document or DocuSign template for signing.

Before you begin

Role required: sn_hr_core.admin

About this task

Depending on whether the user is signing an ad hoc document (HR PDF document template) or a DocuSign template, the following preconfigured HR services, flows, and HR case templates are available for your use and example. See HR services to learn more about HR service configuration, generally.

HR configuration details

Flow	Component	Name
Ad hoc document flow	HR service	Request Signature using DocuSign on Adhoc Document
	Flow	DocuSign Integration Flow - Adhoc Document
	HR case template	Signature using DocuSign on Adhoc Document
DocuSign template flow	HR service	Request Signature using DocuSign Template
	Flow	DocuSign Integration - DocuSign Template
	HR case template	Signature using DocuSign Template

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Procedure

1. Configure an HR service for the DocuSign integration.

   a. Navigate to **HR Administration** > **HR Service Configuration**.

   b. Click **New** or open a record.

   c. On the HR service form, provide the following values.

   HR services form fields

Flow	Field	Value
Ad hoc document flow	HR service name	<Name of the HR service>
	Fulfillment type	Flow
	Flow	DocuSign Integration Flow - Adhoc Document
DocuSign template flow	HR service name	<Name of the HR service>
	Fulfillment type	Flow
	Flow	DocuSign Integration - DocuSign Template

   d. Fill in the other fields on the form, as appropriate.
   For further details on creating an HR service, see Configure an HR service.

   Note: In the HR Service Additional Information related list, make sure that the **PDF Template** field is included so that it appears on the HR case form when a request for this service is made. See Configure the HR case form for an HR service for more information.

   e. Right-click the form header and click **Save**.

2. Configure an accompanying HR case template.

   a. In the **Template** field, click the Lookup icon.

   b. In the **HR Templates** list, click **New** or open a record.

   c. From the **Add fields** list, select **PDF Template.**

   d. In the **PDF Template** field, select the HR PDF document template that you want to make available for signing.

   Note:

   - For the ad hoc document flow, make sure to select an HR PDF document template with the **Template type** field set to `HR PDF Templates`.ake
   - For the DocuSign template flow, make sure to select an HR PDF document template with the **Template type** field set to `DocuSign Templates`.

   e. Fill in the other fields on the form, as appropriate.

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For further details on creating an HR case template, see Configure an HR case template.

f. Click **Submit**.

g. On the HR service form, click **Update**.

Integrating with the Adobe Sign service

Request electronic signatures through the Adobe Sign service with the Adobe Sign integration. This integration depends on the Adobe Sign spoke in IntegrationHub, and is enabled for the signing of adhoc documents (HR PDF document templates) and Adobe Sign templates.

Important:

Starting with the Australia release, HR Document Templates is being prepared for future deprecation. It will be hidden and no longer activated on new instances, but will continue to be supported.

Use Document Templates and Document Template integration with AdobeSign that provide the latest experience for this functionality. For migration guidelines, see Migrating from HR Document Templates to Document Templates.

For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

A preconfigured HR service, flow, and HR case template for both the adhoc document and Adobe Sign document are available to use.

Note: The Adobe Sign Integration flow will be completed (or not in waiting state) only after all the HR tasks created for the HR case are signed or expired or cancelled by the users.

Adobe Sign spoke

The Adobe Sign integration depends on the Adobe Sign spoke in IntegrationHub. Before you begin, your administrator must have:

- activated the Adobe Sign spoke
- set up the Adobe Sign spoke

Adobe Sign integration setup

Once the Adobe Sign spoke is set up, you can configure the integration for HR. The integration has a single flow that branches out into sub flows, one for signing an adhoc document (HR PDF document template) and another for signing an Adobe Sign template. The sub flow triggered for a document depends on the PDF template type that is configured for that document.

For each document that you want to make available for signing through the Adobe Sign service, configure as follows.

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Adobe sign integration configuration requirements

Type of document	Configuration requirements
Adhoc document (HR PDF document template)	1. Create a managed document that you want to make available for signing. See Managed Documents for more information. 2. Configure an HR service for the adhoc document. 3. Configure an HR PDF document template for an adhoc document.
Adobe Sign document	1. Create an Adobe Sign template that you want to make available for signing. 2. Configure an HR service for the Adobe Sign integration. 3. Configure an HR PDF document template for an Adobe Sign template.

Each adhoc document is configured as a standard HR PDF document template. You can add signers to the document with **Mark Signatures**, and then map each signature field to an appropriate user field in a table. The positioning of the markings are not used, and the Adobe Sign integration allows the signer to sign anywhere in the document. You can also parse the PDF to map document fields to corresponding table fields to auto-populate the document when it is generated for signing. The generated document is static, which means that it is read-only and the signatory cannot update any of the fields.

Each Adobe Sign template is brought into the ServiceNow system, and then configured into an HR PDF document template to enable mappings. Map each signature field from the Adobe Sign template to an appropriate user field in a table. The generated document is dynamic, which means that the signatory can write in editable fields, such as to update an address or provide W-4 information. However, any updates made are saved to the document only.

Requesting electronic signatures through the Adobe Sign service

Once the integration setup is complete, HR agents from your organization can request electronic signatures through the Adobe Sign service.

For more information, see Request an electronic signature through the Adobe Acrobat Sign service.

Activate the Adobe Sign spoke

Activate the Adobe Sign spoke in IntegrationHub from the ServiceNow Store, and enable the signing of adhoc documents (HR PDF document templates) and Adobe Sign templates.

Before you begin

Role required: admin

Procedure

1. Navigate to the ServiceNow Store.
2. In the ServiceNow Store, search for the Adobe Sign spoke.
3. Click the application tile.

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Detailed information about the application you are installing is displayed. Consider reading the Other Requirements and Dependencies sections, as applicable.

4. Click **Get** and enter your HI login credentials.
5. Enter the **Instance Name** and **Reason for request**, and click **Validate Instance**.
   You will receive an email with detailed installation instructions.
6. Log in to the instance and set up the Adobe Sign spoke.

Configure an HR PDF document template for an adhoc document

If you are using the Adobe Sign integration, configure an HR PDF document template for each ad hoc document that you want to make available for signing.

Before you begin

Create the managed document that you want to make available for signing through the Adobe Sign system. See Managed Documents for more information.

Role required: sn_hr_core.admin

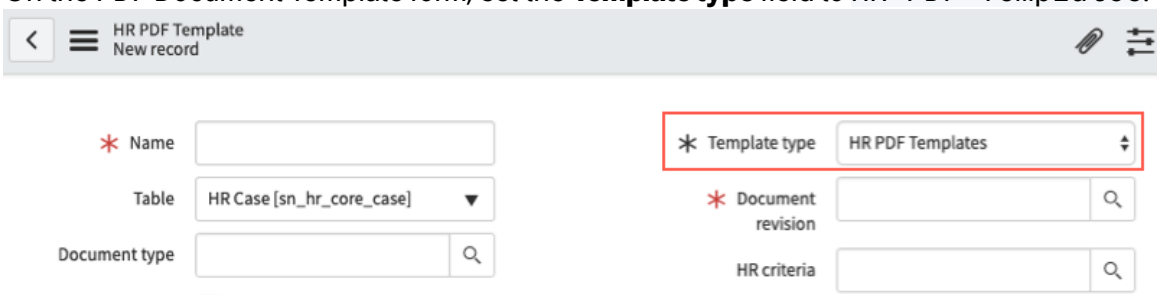
You can use an existing or create an HR PDF document template. You can add signers to the document with Mark Signatures, and then map each signature field to an appropriate user field in a table. As part of the Adobe Sign integration, you can also enable serial signing for documents that require multiple signers.

Procedure

1. Navigate to **All** > **HR Administration** > **Document Templates**.
2. Click **New** or open a record.

   Note: If you are creating a record, make sure to select **PDF Document Template**.

3. On the PDF Document Template form, set the **Template type** field to `HR PDF Templates`.



4. Fill in the fields on the form, as appropriate.

HR PDF Template form

Field	Description
Name	Name of the HR document template.
Table	HR table that the HR document template is associated with.
Document type	Document type that the HR document template is categorized under.
Active	Option to activate the HR document template for use.
Template type	Set the value to `HR PDF Templates`.
Document revision	Select the adhoc template to use.

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Field	Description
HR criteria	Defines the conditions that the subject person of an HR case must meet for an HR agent to be able to access the HR document template on their behalf. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

5. Right-click on the form header and click **Save**.
   The PDF Template Mappings section is displayed.
6. , as appropriate.
   You can add signers to the document with **Mark Signatures**, and then map each signature field to an appropriate user field in a table. You can also parse the PDF to map document fields to corresponding table fields to auto-populate the document when it is generated for signing.

   Note: The positioning of **Mark Signatures** is not used, and the integration allows the signer to sign anywhere in the document.

7. If you want to enable serial signing for documents that require multiple signers, assign the signing order for each signature field in the PDF Template Mappings section.
   If the **Signing order** column is not visible, click the gear icon to personalize the list columns. Add the **Signing order** field to the Selected column.

   Note:
   - The **Signing order** field remains empty in case of parallel signing.
   - Ensure that the **Field name** of **Document field type** `Signature` is specified as Participant1, Participant2, Participant3, and so on.
   - Ensure that the signing order of the first participant is lesser than the signing order of the second participant.

8. Click **Update**.

Configure an HR PDF document template for an Adobe Sign template

If you are using the Adobe Sign integration, configure an HR PDF document template for each Adobe Sign template that you want to make available for signing. You must map each signature field from the Adobe Sign template to an appropriate user field in a table.

Before you begin

Create the Adobe Sign template that you want to make available for signing through theAdobe Sign system. See the Adobe Sign user guide for more information. You must also synchronize your accounts to bring the Adobe Sign template (and any other new or updated templates) into the ServiceNow system. See Sync Adobe Sign with ServiceNow for more information.

Note: Each Adobe Sign in template must have one associated document. Multiple documents per template are not supported.

Role required: sn_hr_core.admin

Procedure

1. Navigate to **All** > **HR Administration** > **Document Templates**.
2. Click **New** or open a record.

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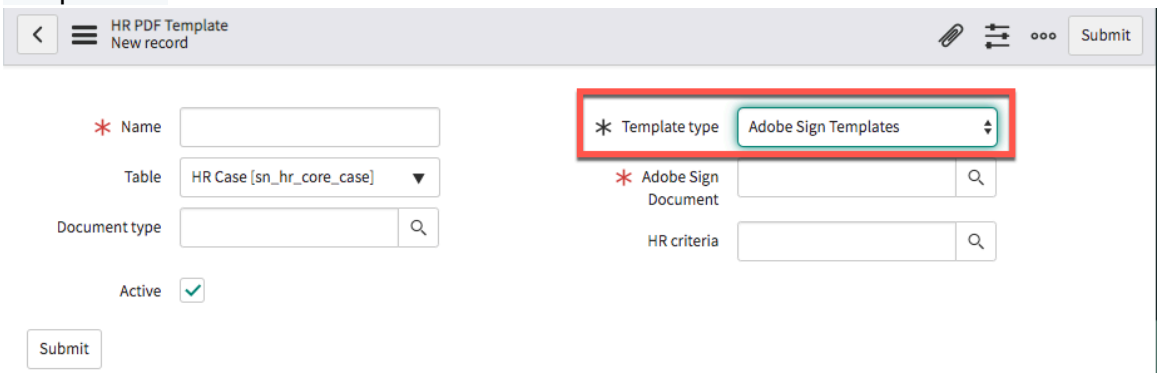
Note: If you are creating a record, make sure to select **PDF Document Template**.

3. On the PDF Document Template form, set the **Template type** field to `Adobe Sign Templates`.



Note: Pre filled Adobe sign templates are not supported.

4. Fill in the fields on the form, as appropriate.

HR PDF Template form

Field	Description
Name	Name of the HR document template.
Table	HR table that the HR document template is associated with.
Document type	Document type that the HR document template is categorized under.
Active	Option to activate the HR document template for use.
Template type	Set the value to `Adobe Sign Templates`.
Adobe Sign Document	Select the Adobe Sign template to use. **Note:** You must synchronize each time you need to get new or updated Adobe Sign templates.
HR criteria	Defines the conditions that the subject person of an HR case must meet for an HR agent to be able to access the HR document template on their behalf. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global API API.

5. Right-click on the form header and click **Save**.
The PDF Template Mappings section is displayed.
6. In the **PDF Template Mappings** section, you must manually map fields from the Adobe Sign template to corresponding table fields to populate the document when it is generated for signing.

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Example



PDF Template Mappings

Field	Description
Field name	Name of the field that is being mapped from the Adobe Sign system to the ServiceNow system. **Note:** Ensure that the **Field name** of **Document field type** `Signature` is specified as Participant1, Participant2, Participant3, and so on.
HR PDF Template	Name of the HR PDF template.
Document field	Suitable name of the field that is being mapped.
Document field type	Type of the document field that is being mapped, such as **Signature**, **Text**, or **check box**.
Mapping table	HR table that stores all the field mappings.
Mapping field	Reference field from which the value is rendered in the **Document** field.
Signing order	Order in which the participants are to sign the document. **Note:** ○ If the **Signing order** column is not visible, click the gear icon to personalize the list columns. Add the **Signing order** field to the Selected column. ○ Ensure that the signing order of the first participant is lesser than the signing order of the second participant. ○ The **Signing order** field remains empty in case of parallel signing.
Active	Option for enabling or disabling a field mapping.

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Note: Field mappings are case sensitive.

7. Click **Submit**.

Configure an HR service for the Adobe Sign integration

Create or modify an HR service to request electronic signatures through the Adobe Sign service. A preconfigured flow to collect signatures for either an adhoc document (HR PDF document template) or an Adobe Sign template is available to use.

Before you begin

Role required: sn_hr_core.admin

About this task

For signing an adhoc document (HR PDF document template) or an Adobe Sign template, the following preconfigured HR service, flow, and HR case template are available for your use.

- Case template: Signature using Adobe sign in
- HR service: Signature using Adobe sign in
- Flow: Adobe Sign Integration Flow

Procedure

1. Configure an HR service for the Adobe Sign integration.
   a. Navigate to **HR Administration** > **HR Service Configuration**.
   b. Click **New** or open a record.
   c. On the HR service form, provide the following values for an adhoc document and Adobe Sign document:
      - HR service name: Signature using Adobe sign in
      - Fulfillment type: Flow
      - Flow: Adobe Sign Integration Flow
   d. Fill in the other fields on the form, as appropriate.
   For further details on creating an HR service, see Configure an HR service.

      Note: In the HR Service Additional Information related list, make sure that the **PDF Template** field is included so that it appears on the HR case form when a request for this service is made. See Configure the HR case form for an HR service for more information.

   e. Right-click the form header and click **Save**.
2. Configure an accompanying HR case template.
   a. In the **Template** field, click the Lookup icon.
   b. In the **HR Templates** list, click **New** or open a record.
   c. From the **Add fields** list, select **PDF Template.**

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d. In the **PDF Template** field, select the HR PDF document template that you want to make available for signing.

Note:

- For adhoc document, make sure to select an HR PDF document template with the **Template type** field set to `HR PDF Templates`.
- For the Adobe Sign template, make sure to select an HR PDF document template with the **Template type** field set to `Adobe Sign Templates`.

e. Fill in the other fields on the form, as appropriate.
For further details on creating an HR case template, see Configure an HR case template.

f. Click **Submit**.

g. On the HR service form, click **Update**.

Integrating with the CIC Plus service

Integrate with the CIC Plus service so that you can enable US-based new hires to provide relevant tax information as part of the onboarding process.

This integration assumes you are already integrated with a third-party identity provider (IDP) service, and is configured to work with the lifecycle event for new hire onboarding that is included as demo data with the Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Setting up the CIC Plus integration

To set up the CIC Plus integration, you must configure a SAML connection between your third-party identity provider (IDP) and CIC Plus accounts. Your CIC Plus partner must then set up your account to get employee profiles for US-based employees through the *`get_usa_employee_profile`* REST endpoint, as well as verify that the callback is properly configured. Finally, you must configure the source credentials to include the login URL of the identity provider service you are using with the CIC Plus integration. For details on how to set up the CIC Plus integration, see Set up the CIC Plus integration.

Using the CIC Plus integration with new hire onboarding

Once the integration is set up, you can use the CIC Plus service with new hire onboarding. The following components are included in the demo data for your use and example.

Note: The lifecycle event for new hire onboarding is included as demo data with the Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent] plugin.

Integration components

Component	Name
Lifecycle event activity	Complete Tax Forms (in the Day One activity set)
HR service	Complete Tax Forms through CIC Plus
HR case template	Complete Tax Forms through CIC Plus

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How the CIC Plus integration works

The CIC Plus integration works as follows. Your HR management system (HRMS) pushes employee information to your IDP and ServiceNow AI Platform systems. The CIC Plus integration then invokes the *get_usa_employee_profile* REST endpoint to fetch employee information. When a user opens an assigned task and clicks on the link to connect to the CIC Plus service, the CIC Plus integration authenticates the user through a SAML identification via your IDP service. After the user completes the required tax forms, the status is pushed back to the ServiceNow AI Platform system and the employee task is automatically closed.

Set up the CIC Plus integration

Integrate with the CIC Plus service by configuring a SAML connection between your third-party identity provider (IDP) and CIC Plus accounts.

Before you begin

Role required: sn_hr_core.admin

Your CIC Plus partner must then set up your account to get employee profiles for US-based employees through the *get_usa_employee_profile* REST endpoint, as well as verify that the callback is properly configured. Finally, you must configure the source credentials to include the login URL of the identity provider service you are using with the CIC Plus integration.

To set up your integration with the CIC Plus service, you must first:

- Be integrated with a third-party identity provider (IDP) service. That provider must have user records for the new hire in their system.
- Create a user with the sn_hr_core.usa_employee_only role.
- Gather the following information from your CIC Plus partner:
  - SAML configuration details
  - Company ID
- Provide the following information to your CIC Plus partner:
  - IP address range
  - Platform instance URL
  - Credentials for a user with the sn_hr_core.usa_employee_only role

Role required: sn_hr_integrations.admin

Procedure

1. Configure a SAML connection between your third-party identity provider (IDP) and CIC Plus accounts.

   Important: Make sure to configure the SAML connection with the name identifier as the employee number.

   For information on how to configure the SAML connection, refer to the CIC Plus documentation.
2. Your CIC Plus partner must then:

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a. Configure your account to get employee profiles for US-based employees through the `get_usa_employee_profile` REST endpoint.
For information and examples on the `get_usa_employee_profile` REST endpoint, see get_usa_employee_profile.

b. Verify that the callback is properly configured within your CIC Plus account.

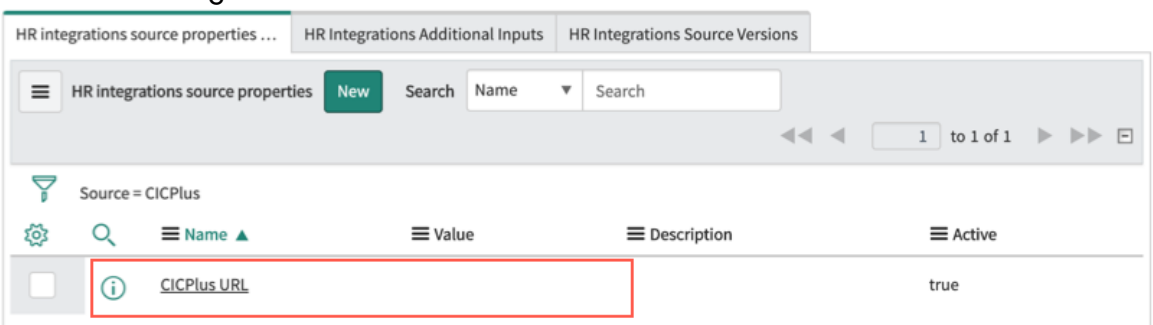
3. Configure the source credentials to include the login URL of the identity provider service:

a. Navigate to **HR Integrations** > **Sources**.

b. Open the **CIC Plus** record.

c. In the **HR integrations source properties** related list, open the **CIC Plus URL** source property.

d. In the **Value** field, provide the login URL of the identity provider service you are using with the CIC Plus integration.



Enterprise Service Management Integrations Framework

The ServiceNow® Enterprise Service Management Integrations Framework application contains common components that can be used for integrating your ServiceNow application with third-party systems. It uses the flow designer capability to communicate with external instances and third-party systems.

The application provides a consistent way of building integrations for common use cases such as pulling employee profiles and tasks from the third-party application to a ServiceNow application, and pushing data from a ServiceNow application into a third-party application.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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Get started

Configure	Use	Reference
		
Plan and configure your implementation.	Use Enterprise Service Management Integrations Framework for third party integrations.	Get details about components like fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Setting up Enterprise Service Management Integrations Framework

Understand how to set up Enterprise Service Management Integrations Framework to use for integration with third-party systems.

Before you begin

Role required: sn_hr_integr_fw.admin

To set up Enterprise Service Management Integrations Framework, you must first activate the Enterprise Service Management Integrations Framework application from ServiceNow Store. Next, you must Setting up Enterprise Service Management Integrations Framework.

Procedure

1. Create a source record by specifying the third-party application with which you want to integrate your ServiceNow application.
   For more information, refer to Create a source in Enterprise Service Management Integrations Framework.
2. Create an import set table.
3. Create a flow in Flow Designer.
   For more information, refer to Create a flow.

   Note: The flows or subflows that you are parsing into integration services must follow the input and output structure of Template Integration Service.

4. Create an integration service to connect with the third-party system.
   For more information, refer to Create an integration service in Enterprise Service Management Integrations Framework.

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5. Create transformation maps.
   For more information, see Create transform maps in Enterprise Service Management Integrations Framework.

Note:

- You must create transformation maps only for Schedule Pull services, and not for Ondemand Push services.
- If you are using Enterprise Service Management Integrations Framework to pull tasks from a third-party system, use the Pull to-do transform map.

Create a source in Enterprise Service Management Integrations Framework

Create a source record that represents the third-party system which is integrating with your HR Service Delivery application.

Before you begin

Role required: sn_hr_integr_fw.admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **Source**.
2. Click **New**.
3. On the form, fill in the fields:

Integration Sources

Field	Description
Name	Display name of the third-party application.
Properties	Properties configured according to the requirements of the integration.
Domain	Name of the application for which the record is created.

4. Click **Submit**.

Create an integration service in Enterprise Service Management Integrations Framework

Create an integration service to connect with the third-party system.

Before you begin

Role required: sn_hr_integr_fw.admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **Source**.
2. In Integration Services, click **New**.
3. On the form, fill in the fields:

Integration Services

Field	Description
Active	Option to indicate that the integration service is available for use.
Import set tables	List of intermediate tables which store records from the third-party system.

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Field	Description
	Note: This field is enabled only when Scheduled pull service is selected in the **Service type** field.
Flow	Flow that interacts with the third-party system to pull the required data.
Name	Display name of integration service.
Source	Name of the third-party system with which you want to integrate your application.
Application	Application which contains the integration service record.
Order	Order in which you want to run transformation scripts.
Service type	Option to indicate the type of service **Scheduled pull** or **Ondemand Push**.
Retry policy	Configuration set to push a record if the previous push fails. **Note:** This field appears only when Ondemand Push service is selected in the **Service type** field.

Create transform maps in Enterprise Service Management Integrations Framework

Create a transform map to specify data relationships between the import set table and the target table.

Before you begin

Role required: sn_hr_integr_fw.admin

About this task

For every transformation, you must either create a transform map or select an existing one.

Procedure

1. Navigate to **Integrations Framework** > **Transform Maps**.
2. View the existing transform maps.

Transformation Maps

Name	Description
HR Pull to-do transform map	Moves tasks or Todos from the HR Pulled To-do Integration Staging [sn_hr_integr_fw_todo_inbound_staging] table into the HR Pulled Integration To-do [sn_hr_integr_fw_todo_inbound] table.
HR Profile Transform Map	Maps workers, future workers, and effective workers from the HR Profile Staging [sn_hr_integr_fw_hr_profile_staging] table into the HR Profile [sn_hr_core_profile] table.
Job Transform Map	Maps job profiles from the Job Staging [sn_hr_integr_fw_job_staging] table to the Job [sn_hr_core_job] table.
Department Transform Map	Maps departments from the Department Staging [sn_hr_integr_fw_department_staging] table to the Department [cmn_department] table.

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Name	Description
Location Transform Map	Maps locations from the Location Staging [sn_hr_integr_fw_location_staging] table to the Location [cmn_location] table.
Position Transform Map	Maps positions from the Position Staging [sn_hr_integr_fw_position_staging] table to the Position [sn_hr_core_position] table.

3. To create a transform map, click **New**.
   For details of how to create a transform map, refer to the table in Transformation scripts.

Create a subflow using Template Integration Gateway

Use the Template Integration Gateway as a reference to create the supported subflows for Integration Gateway.

Before you begin

Role required: flow_designer, sn_hr_integr_fw.admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. In **Subflows**, select Template Integration Gateway.
3. Create a copy of subflow, and provide a suitable name for the flow, click **Copy**.
4. Delete logs.
5. Add the logic and assign flow outputs:

Outputs

Field	Description
Data	Result that is returned.
Provider	Name of the provider.
Status	Type of code number displayed when no results are returned. Code numbers vary based on scenario.
Message	Message associated with status.

What to do next

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. In Subflows, select Integration Gateway.
3. Create an entry for the above created subflow. For more information, see Configure Integration Provider Mapping (Decision table).
4. Click **Test**.
   a. In Test Subflow, select User, Feature Name, Service Name, and Payload.
   b. Click **Run Test**.
   Verify if the outputs or results generated are correct. Validate if the correct subflow has been run.

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Configure Integration Provider Mapping (Decision table)

Add input choices and define conditions and results in a decision table for the Integration Gateway subflow to review and generate output results.

Before you begin

View Now Assist for HR Service Delivery (HRSD) Virtual Agent topic mapping for Enterprise Service Management Integrations Framework.

Role required: decision_table_admin, sn_hr_integr_fw.admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Navigate to Decision Tables.
3. Select **Integration Provider Mapping**.
4. In Inputs, provide the required values:

Example of input data

Label	Description
Feature name	In Type, create a list of choice options for a feature name. For example, options within Feature name can be Leave Management, or Expense Management.
Service name	Create a list of choice options for a service name. For example, options within Service name can be Time Off Balance, or Get Holiday Calendar.
User	Provide reference to a user from the User [sys_user] table.

5. To add a decision row, select **add new decision row** and provide conditions on input choices, and define the results:

Example of conditions and results in Decision table

Conditions and Results	Description
Feature name	Option you select from the Feature name list. For example, Leave Management.
Service name	Option you select from the Service name list. For example, Time Off Balance.
User country	Option you select for user's country list. You can also add additional conditions on **User country** by adding a condition column. For example, you can also add a check based on user department.
Subflow	Subflow you select to generate results. For example, Get time off balance subflow. The Get Time off Balance topic in Employee Center Center retrieves holiday calendar of user from Oracle HCM system by running the Get time off balance subflow.
Needs Manager Role	When set to true, the user must be a manager to run the subflow.

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Conditions and Results	Description
User Authentication	When set to true, the OAuth entity value is considered to validate the user for running the subflow.
OAuth Entity	OAuth Entity details. For Oauth Entity, the profiles with grant type as authorization code are supported.

6. To validate the conditions specified on inputs choices, click **Test**.
   a. In the Test Decision table, select Feature Name, Service Name, and User.
   b. Select **Test**. For example, the results display the Get time off balance subflow to fetch the time off balance of a user.
7. Select **Publish**.

Using Enterprise Service Management Integrations Framework

Understand how you can use Enterprise Service Management Integrations Framework to connect with a third-party system.

Before you begin

Role required: sn_hr_integr_fw.admin

Procedure

1. Create a source.
   For more information, see Create a source in Enterprise Service Management Integrations Framework.
2. Create an integration service for the source.
   For more information, see Create an integration service in Enterprise Service Management Integrations Framework.
3. Create a scheduled job and trigger the run job flow for the source.
   - Entries are created in the Integration Job Tracker [sn_hr_integr_fw_job_tracker] table. Entries are created for active Scheduled Pull services in the Integration Service Job Tracker [sn_hr_integr_fw_service_job_tracker] table.
   - Import sets are created and attached to the service job tracker, and load start time is populated. Once data is loaded in the import set tables, the state of the service job tracker changes to loaded and the load end time is populated.
   - Once data is loaded for all the services, transformation begins based on the service order defined in the Integration Service [sn_hr_integr_fw_service] table. The states of services change to complete, and then the state of the job tracker record changes to complete. For more information, see View job tracker details.

View tasks of a third-party system

View tasks that are pulled from the third-party system into Enterprise Service Management Integrations Framework.

Before you begin

Role required: sn_hr_integr_fw.admin

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Procedure

1. Navigate to **All** > **Integrations Framework** > **Todos**.
2. View details of tasks.

Pulled Integration To-do

Field	Description
Integration todo ID	Unique identifier for the integration Todo.
Todo description	Description of the Todo or task in the third-party system.
Todo state	State of the Todo or task in ServiceNow system, such as Open or Closed.
Active	Option indicating whether the Todo or task is active in the third-party system.
Assigned to	User to whom the Todo or task is assigned.
External Status	Status of the Todo or task in external system.
Extension System	Option indicating the origin of Todo or task.
Domain	Option indicating that domain separation is enabled for this table.
Approving	Option to approve a document that is pulled from a ServiceNow system or a third-party system. On selecting this option, a window appears that allows you to specify a table and select a document from the table.

Important:

- By default, the Auto Flush data retention policy removes to-dos after seven days. If you do not want the to-dos to be removed from the table:
  a. Navigate to **System Maintenance** > **Table Cleanup** and select **sn_hr_integr_fw_todo_inbound**.
  b. To inactivate the retention policy, deselect the **Active** checkbox.
  c. To specify a different condition in the retention policy, add a script in the **Condition** field.
- If you want use the Pulled Integration To-do table to pull to-dos or tasks from a third-party system, then you must create an implementation of this extension point: sn_hr_integr_fw.TodoTransformHelper.

View job tracker details

View details of the source job and service job, such as when did the job begin and end, when did the records start loading into staging tables, or did the job run completely or fail in between.

Before you begin

Role required: sn_hr_integr_fw.admin

About this task

Once a scheduled flow is triggered or the **Run job** button on source module is clicked, records are created in the Integration Job Tracker and Integration Service Job Tracker tables.

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Procedure

1. Navigate to **All** > **Integrations Framework** > **Job Tracker**.
2. View the job details.

Integration Job Tracker

Field	Description
Job name	Name of the job with application name appended.
Job start time	Date and time when the source job has begun.
Job end time	Date and time when the source job has ended.
Error message	Message displayed when the job fails. If the source job fails, you must run the job again.
Source	Name of the source for which the transformation job is run. For example, Cornerstone On Demand, or Pluralsight.
State	Current state of the job such as failed, completed, or running.

HR Integration Service Job Tracker

Field	Description
Integration service	Name of the integration service.
Sets	Lists of import sets.
Load started at	Option indicating the date and time when records started loading into staging table.
Load ended at	Option indicating the date and time when the records finished loading into staging table.
Last run date	Option indicating the last time and date when the service was pulled correctly.
Error message	Message displayed when the service job fails. If the service job fails, you must run the job again.
State	State of the service job such as loaded, running, or completed.
Transform started at	Option indicating the date and time when the transformation has begun, and records are moved from staging table to target table.
Transform ended at	Option indicating the date and time when the transformation has ended.
Flow Execution ID	Unique identifier of the flow that is executed for integration service. **Note:** The reporting feature is turned off for the flows (used for large integrations) that are created for Enterprise Service Management Integrations Framework.
Sync token	Stores token returned by APIs for certain integration services.

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Use External Interface to push records into a third-party system

Use External Interface to view details of records that are being pushed from ServiceNow into a third-party system.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **External Interface**.
2. On the form, view the fields:

External Interfaces form

Field	Description
Service	OnDemand push service that is invoked to interact with a third-party system.
Source table name	Source table in which the record is stored.
Table Sys ID	Sys ID of the table record that has been modified. A combination of **Source table name** and **Table Sys ID** is used to identify and push the modified record into a third-party system.
Status	Current status of the push, such as completed or pending.
Error message	Error message displayed when the push failed.
Error code	Error code displayed when the push failed.

What to do next

The Trigger External Interfaces flow automatically:

- Identifies records whose Status is Pending, Service is Active, and Service type is OnDemand Push from the External Interface [sn_hr_integr_fw_ext_interface] table.
- Pushes the identified records into third-party system.

Enterprise Service Management Integrations Framework reference

Reference topics provide additional information about the Enterprise Service Management Integrations Framework, including lists and forms.

Components installed with Enterprise Service Management Integrations Framework

Several types of components are installed with activation of the Enterprise Service Management Integrations Framework [sn_hr_integre_fw], including tables and user roles.

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Roles

Roles installed with Enterprise Service Management Integrations Framework

Role title [name]	Description	Contains roles
Framework Integrations Admin [sn_hr_integr_fw.admin]	Can access and set up Enterprise Service Management Integrations Framework.	Flow Operator [flow_operator]

Tables

Tables installed with Enterprise Service Management Integrations Framework

Table	Description
Integration Source [sn_hr_integr_fw_source]	Stores source records representing third-party systems which are integrating with your ServiceNow application.
Integration Service [sn_hr_integr_fw_service]	Stores records of integration services. An integration service is created for each entity that is pulled from a third-party system.
Integration Job Tracker [sn_hr_integr_fw_job_tracker]	Stores source job details, such as start time, run end time, and state. For more information, see View job tracker details.
Integration Service Job Tracker [sn_hr_integr_fw_service_job_tracker]	Stores service job details such as start time, end time, and state. For more information, see View job tracker details.
Pulled Integration To-do [sn_hr_integr_fw_todo_inbound]	Stores tasks that are pulled from the third-party system into Enterprise Service Management Integrations Framework. For more information, see View tasks of a third-party system.
External Interface [sn_hr_integr_fw_ext_interface]	Stores modified records that are pushed from a ServiceNow application into a third-party system.

Widgets to display tasks from a third-party system

The **HRSD Framework Integration** and **HRSD Integration Framework Complete** pre-configured widgets help to display tasks from a third-party system to the To-dos page in Employee Center.

These widgets are available only when the Human Resources Scoped App: Core [com.sn_hr_core] application is activated. For more information on these widgets, navigate to **Employee Service Center** > **To-dos Configuration**.

Now Assist for HR Service Delivery (HRSD) Virtual Agent topic mapping for Enterprise Service Management Integrations Framework

View the Virtual Agent topic-feature-service mapping for Now Assist for HR Service Delivery (HRSD) integration with Enterprise Service Management Integrations Framework.

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Virtual Agent topic-feature-service mapping

Virtual Agent Topic	Feature Name	Service Name
Look up Worker Profile	Worker Management	Get Worker
Manage Time Off	Leave Management	Time off balance
		Create Time Off Request
Get Time Off Balance		Time Off Balance
Get Holiday Calendar		Holiday Calendar
Get Total Rewards	Benefits Management	Total Rewards
Lookup Benefit Enrollments		Get Benefits
Get User Paychecks	Payroll Management	Get Paychecks
Lookup Feedback	Feedback Management	Get Feedback
Add Expense	Expense Management	Fetch Category and Currency
		Add Expense
• Update Email Address • Update Address • Update Phone Number • Update Date of Birth • Update Blood Type	Human Capital Management	Update Personal Details
	Worker Management	Get Worker

HR Service Delivery Integration with Cornerstone OnDemand

The ServiceNow® HR Service Delivery Integration with Cornerstone OnDemand application enables you to display relevant learning courses for employees as part of their To-do tasks in the ServiceNow Employee Center.

Cornerstone OnDemand is a learning system that hosts learning videos, training, and certifications for employees. Using HR Service Delivery Integration with Cornerstone OnDemand, you can pull learning tasks from the Cornerstone OnDemand system to ServiceNow so that employees can view all their To-do tasks in a single location, Employee Center.

Setting up the application

To set up the HR Service Delivery Integration with Cornerstone OnDemand application, you must first activate the HR Service Delivery Integration with Cornerstone OnDemand plugin [sn_hr_cornerstone] from ServiceNow Store. This plugin activates Cornerstone spoke in IntegrationHub and Enterprise Service Management Integrations Framework. Next you must set up the Cornerstone spoke in IntegrationHub. For details on how to complete the set up, refer to Setting up HR Service Delivery Integration with Cornerstone OnDemand.

Using Enterprise Service Management Integrations Framework

Enterprise Service Management Integrations Framework provides a consistent way of building integrations for common use cases such as pulling employee profile information, pulling to-dos, or pulling other data from third-party systems and storing it in ServiceNow instance. It contains common components, such as the Source table, HR Integration Services table, scheduled flows, and transform maps, that can be used for building integrations.

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By default, when the HR Service Delivery Integration with Cornerstone OnDemand application is set up, source, HR integration services, scheduled flows, and transform maps are automatically set up for the Cornerstone OnDemand system in Enterprise Service Management Integrations Framework. The schedule flows in Enterprise Service Management Integrations Framework interact with the Cornerstone OnDemand system to pull users, learning objects, and transcripts into ServiceNow.

Assigning learning tasks to employees

When learning tasks are assigned to employees in the Cornerstone OnDemand system, transcripts are created for those employees in the Cornerstone OnDemand system.

Enterprise Service Management Integrations Framework, using the Sync Transcripts service, pulls the transcripts from the Cornerstone OnDemand system and displays them as tasks in the To-dos page in Employee Center.

On clicking the learning task in Employee Center, the employee is navigated to Cornerstone OnDemand system for completing the task. When the employee completes the task in Cornerstone OnDemand system, the status of task gets updated in Employee Center after the scheduled job is run for the Cornerstone OnDemand system.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Get started

Configure	Reference
	
Plan and configure your implementation.	Get details about components like fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

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Setting up HR Service Delivery Integration with Cornerstone OnDemand

Understand how to set up the HR Service Delivery Integration with Cornerstone OnDemand application for pulling learning courses from the Cornerstone OnDemand system into the ServiceNow system.

Before you begin

- Role required: sn_hr_cornerstone.admin
- Activate the Human Resources Scoped App: Core plugin [com.sn_hr_core].
- Activate the HR Service Delivery Integration with Cornerstone OnDemand plugin [sn_hr_cornerstone] from ServiceNow Store. This plugin activates Cornerstone spoke in IntegrationHub and HR Service Delivery Integrations Framework plugin [sn_hr_integr_fw].

Procedure

1. Set up the Cornerstone spoke in IntegrationHub.
   For more information, refer to the Cornerstone spoke documentation.
2. Configure the URL prefix in the Cornerstone source record in HR Service Delivery Integration with Cornerstone OnDemand.
   For more information, refer to Use deep link for HR Service Delivery Integration with Cornerstone OnDemand.

   Important: Once you have activated the necessary plugins and set up the Cornerstone spoke, HR Integration Services (for Cornerstone OnDemand application) are automatically created. For more information, refer to HR Integration Services for HR Service Delivery Integration with Cornerstone OnDemand.

3. Configure the flow for HR Service Delivery Integration with Cornerstone OnDemand.
   For more information, refer to Configure the flow for HR Service Delivery Integration with Cornerstone OnDemand.

Use deep link for HR Service Delivery Integration with Cornerstone OnDemand

Use the deep link prefix to pull learning objects from the Cornerstone OnDemand system during run time.

Before you begin

Role required: sn_hr_cornerstone.admin

Procedure

1. Login to the Cornerstone OnDemand application and generate deep links.
   For more information, refer to the documentation of Cornerstone OnDemand system.

   Note: Ensure that you have selected **LO Details** in **Page URL** list in the **Deep link Generator** tab.

2. Copy the URL prefix.
3. Navigate to **HR Cornerstone Integrations** > **Source**.
4. Click **Cornerstone**.
5. In **Properties**, append the copied value in **url_prefix**.

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Configure the flow for HR Service Delivery Integration with Cornerstone OnDemand

Specify the frequency and time at which you want to run the scheduled flow that pulls learning objects, users, and transcripts from the Cornerstone OnDemand application into the ServiceNow system.

Before you begin

Role required: sn_hr_cornerstone.admin

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. Activate the **Trigger CSOD Sync** scheduled flow.
3. Click **Trigger**.
   a. Select a frequency such as daily or weekly or monthly. The default value is **Daily**.
   b. Specify a time. The default value is **21:00:00**.

Configure learning objects for To-dos page

Add or remove learning objects that appear on the To-dos page as learning tasks using the **sn_hr_cornerstone.filtered_learning_objects** system property.

Before you begin

Role required: sn_hr_cornerstone.admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The System Properties list is displayed.
2. Select **sn_hr_cornerstone.filtered_learning_objects**.
3. In the **Value** field, add or remove the learning object ID of the learning task you want on the To-dos page.
4. Select **Update**.

Reference for HR Service Delivery Integration with Cornerstone OnDemand

Reference for HR Service Delivery Integration with Cornerstone OnDemand

Components installed with HR Service Delivery Integration with Cornerstone OnDemand

Several types of components are installed with activation of the HR Service Delivery Integration with Cornerstone OnDemand plugin [sn_hr_cornerstone], including tables and user roles.

Roles installed

Roles and descriptions

Role title [name]	Description	Contains roles
HR Cornerstone Admin [sn_hr_cornerstone.admin]	Can access and set up the HR Service Delivery Integration with Cornerstone OnDemand application.	None

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Tables installed

Tables and descriptions

Table	Description
User Mapping [sn_hr_cornerstone_user_mapping]	Details of users mapped from the Cornerstone OnDemand system into the ServiceNow system.
CSOD Learning Object [sn_hr_cornerstone_lo]	Details of learning objects (such as learning type, learning ID, title) that are pulled from the Cornerstone OnDemand system into the ServiceNow system.
CSOD Status [sn_hr_cornerstone_status]	Status of transcripts in the Cornerstone OnDemand system.

Source for HR Service Delivery Integration with Cornerstone OnDemand

Once you set up the HR Service Delivery Integration with Cornerstone OnDemand application, the source record for Cornerstone On Demand application is automatically created in Enterprise Service Management Integrations Framework, Source module. The Cornerstone OnDemand source record in the in Enterprise Service Management Integrations Framework application contains a predefined set of properties and HR Integration Services.

Properties

Field	Description
Full-pull	When set to **True**, all the active users, active trainings, incomplete to-dos from the Cornerstone OnDemand system are pulled into respective tables in ServiceNow instance. When set to **False**, only modified users, modified trainings, modified transcripts (based on last successful schedule run time) are pulled from the Cornerstone OnDemand system are pulled into respective tables in ServiceNow instance. **Note:** If there is no information on the last successful schedule run time, the first pull will always be a full pull.
page-count	Number of records that are pulled through an API call from the Cornerstone OnDemand system. By default, the value is **500**. **Note:** This property is honored only by the Sync Trainings and Sync Transcripts HR Integration Services, and not by Sync Users HR Integration Service.
url-prefix	Deep link prefix to pull learning objects from the Cornerstone OnDemand system during run time. For more information, see Use deep link for HR Service Delivery Integration with Cornerstone OnDemand.

HR Integration Services for HR Service Delivery Integration with Cornerstone OnDemand

Once you set up the HR Service Delivery Integration with Cornerstone OnDemand application, HR integration services for Cornerstone are automatically created in Enterprise Service

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Management Integrations Framework. The flows in HR Integration Services communicate with the Cornerstone OnDemand system to pull users, learning objects, and transcripts into ServiceNow.

Important: You must activate all of these HR integration services so that data is properly synchronized between the Cornerstone OnDemand system and ServiceNow.

HR Integration Services for Cornerstone

Name	Description
Sync Users	This HR integration service maps users in the Cornerstone OnDemand system to users in the ServiceNow system using email Ids. When the Trigger CSOD Sync schedule flow is run, users are pulled from the Cornerstone OnDemand system to the User Mapping Staging [sn_hr_cornerstone_user_mapping_staging] table. After transformation scripts are run, mapped users are displayed in **HR Cornerstone Integrations** > **Users**.
Sync Trainings	This HR integration service pulls learning objects such videos or curriculum from the Cornerstone OnDemand system to the ServiceNow system. When the Trigger CSOD Sync schedule flow is run, learning objects are pulled into the CSOD Learning Object Staging [sn_hr_cornerstone_lo_staging] table. After the transformation scripts are run, learning objects are displayed in **HR Cornerstone Integrations** > **Learning Objects**.
Sync Transcripts	This HR integration service pulls transcripts from the Cornerstone OnDemand system to the ServiceNow system. When the Trigger CSOD Sync schedule flow is run, transcripts are pulled into HR Pulled To-do Integration Staging [sn_hr_integr_fw_todo_inbound_staging] table. After the transformation scripts are run, transcripts are displayed in **HR Integrations Framework** > **Todos**.

Users for HR Service Delivery Integration with Cornerstone OnDemand

Users from the Cornerstone OnDemand system are mapped to the users in ServiceNow system using email Ids. User mapping helps in assigning learning tasks to the correct user in the ServiceNow system.

When the Trigger CSOD Sync schedule flow is run, users are pulled from the Cornerstone OnDemand system to the User Mapping Staging [sn_hr_cornerstone_user_mapping_staging] table. Once the transformation scripts are run, mapped users are displayed in **HR Cornerstone Integrations** > **Users**.

User Mapping

Field	Description
CSOD ID	CSOD ID from Cornerstone OnDemand system.
Active	Option that indicates whether or not the user is active in the Cornerstone OnDemand system.
User	Name of the user in the ServiceNow system.
CSOD User	Name of the user in the Cornerstone OnDemand system.
CSOD User ID	ID of the user in the Cornerstone OnDemand system.
CSOD Email	Email ID of the user in the Cornerstone OnDemand system.

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Note: In case you want to use **CSOD ID**, **CSOD user**, and **CSOD User ID** fields for mapping users, you must override the getUser method in CSODIntegrationsUtil script.

Learning objects for HR Service Delivery Integration with Cornerstone OnDemand

View details of learning objects that are pulled from the Cornerstone OnDemand system to ServiceNow system. Learning objects help in navigating users to the correct learning to-do details.

When the Trigger CSOD Sync schedule flow is run, the flow in the Sync Trainings service pulls learning objects from the Cornerstone OnDemand system into the CSOD Learning Object Staging [sn_hr_cornerstone_lo_staging] table. After the transformation scripts are run, learning objects are displayed in**HR Cornerstone Integrations** > **Learning Objects**.

Learning Objects

Field	Description
Title	Name of the learning object.
Active	Option indicating that the learning object is in use.
Learning ID	Unique identifier of the learning object.
Learning Type	Type of learning object.
Learning Type ID	Unique identifier of the learning type.
Root LO	Parent of the learning object.

Note:

- These type of learning objects are not displayed in the Learning Objects page: Session, Cohort, Program, and Library type. These type of learning objects appear in the CSOD Learning Object Staging [sn_hr_cornerstone_lo_staging] table, but do not appear in the Learning Objects page after transformation.
- Only the child topics of a certification are displayed as tasks in the To-dos page in Employee Center, and not the certification itself.

Status mapping in Cornerstone OnDemand System

Once you set up HR Service Delivery Integration with Cornerstone OnDemand, mapping between transcript status ID and status value is displayed in the Status page in HR Service Delivery Integration with Cornerstone OnDemand. This information helps to manage the task external status in the HR Pulled Integration To-do table, for Cornerstone OnDemand system.

For example, a transcript with status ID **25** is pulled into Cornerstone OnDemand system into ServiceNow system. **25** implies that the status value of the task is **Pending approval** in the Cornerstone OnDemand system.

Status

Field	Description
Status	Status of the task in the Cornerstone OnDemand system.
Status ID	Unique identifier of the status in Cornerstone OnDemand system.

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Transform maps for HR Service Delivery Integration with Cornerstone OnDemand

By default, when HR Service Delivery Integration with Cornerstone OnDemand is set up, the CSOD user mapping transform and CSOD learning object mappings transformation maps are automatically available for HR Service Delivery Integration with Cornerstone OnDemand. These transform maps specify data relationships between source table and target table.

Transformation maps

Name	Description
CSOD user mapping transform	Maps users from the User Mapping Staging [sn_hr_cornerstone_user_mapping_staging] source table into the User Mapping [sn_hr_cornerstone_user_mapping] target table.
CSOD learning object mappings	Maps learning objects from the CSOD Learning Object Staging [sn_hr_cornerstone_lo_staging] source table into the CSOD Learning Object [sn_hr_cornerstone_lo] target table.
HR Pull to-do transform map	Maps tasks or Todos from the HR Pulled To-do Integration Staging [sn_hr_integr_fw_todo_inbound_staging] table to the HR Pulled Integration To-do [sn_hr_integr_fw_todo_inbound] table. For more information, refer to Create transform maps in Enterprise Service Management Integrations Framework.

HR Service Delivery Integration with Magnit

The ServiceNow® HR Service Delivery Integration with Magnit application provides a seamless experience to track and manage onboarding activities of contingent workers.

Key features

- Track and manage onboarding activities of contingent workers. Pull contingent workers from the Magnit application into a ServiceNow AI Platform instance and create onboarding tasks for contingent workers from ServiceNow AI Platform instance.
- Create custom flows for various use cases. For example, trigger a life cycle event for creating HR cases and notifications in ServiceNow AI Platform instance to manage contingent workers onboarding.
- Provide seamless onboarding experience for contingent workers.

Activation information

First, activate the HR Service Delivery Integration with Magnit application from ServiceNow Store. Activating the application automatically activates the Magnit spoke, Enterprise Service Management Integrations Framework and Human Resources Scoped App: Lifecycle Events for Enterprise.

Next, Set up Magnit spoke.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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Get started

Explore	Configure	Reference
		
Detailed information on the integration	Configure the application to get started	Get details about user roles, tables, default configurations

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore HR Service Delivery Integration with Magnit

Understand the end-to-end work flow of HR Service Delivery Integration with Magnit.

End-to-end flow

1. Ensure that the manager profile is available in the ServiceNow AI Platform instance before pulling contingent worker information.
2. Import Location, Department, Job that must be associated to the contingent worker into ServiceNow AI Platform instance (for example, via bulk import). In case, you do not import the corresponding IDs, these values remain null for the contingent employee.
3. With the sn_hr_magnit.admin role, create relevant HR task templates and associate them to onboarding items pulled from Magnit instance. For more information, see Map Magnit tasks.
4. Create the following properties for the Magnit source. These are one-time configurations:
   - **full_pull_wait_time**: Wait time between receiving correlation ID and calling the full pull action
   - **delta_pull_wait_time**: Wait time between receiving correlation ID and calling the delta pull action

   For more information, see Source for HR Service Delivery Integration with Magnit.
5. Pull contingent workers from Magnit application into ServiceNow AI Platform instance via a scheduled job that can be configured. See Activate a schedule flow.

   A life cycle event is triggered and a lifecycle case is created for each contingent worker. An HR task is created for each onboarding item within the lifecycle case.

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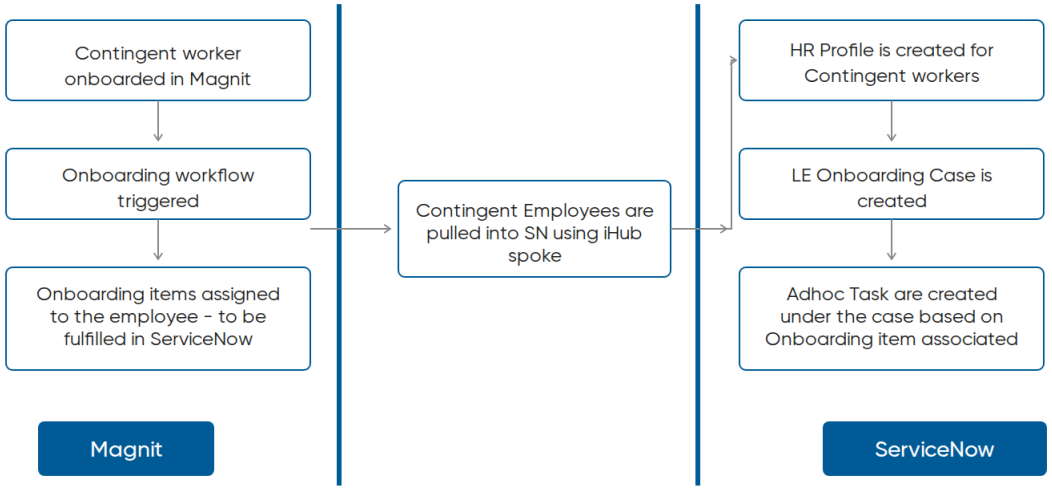
Note: If an HR task is not created for onboarding item, verify if an active Magnit mapping record exists for that onboarding item. For more information, see Map Magnit tasks.

Contingent workers complete onboarding tasks from ServiceNow AI Platform instance.

Flow diagram



Status communication to Magnit

Understand how the status of user onboarding tasks are communicated from the ServiceNow® instance to the Magnit application.

Flow

1. Changing the status of an HR task to Work in progress, Ready, or Draft, automatically changes the status of its corresponding user onboarding item to Pending state in the User Onboarding Item [sn_hr_magnit_user_onboarding_item] table. When the HR task is marked as Complete or Closed Incomplete or Cancelled, the status of its corresponding user onboarding item automatically changes to **Ready to Send** in the User Onboarding Item [sn_hr_magnit_user_onboarding_item] table.
2. The Synchronise attachments of onboarding items flow runs at a specific schedule and time, reads the User Onboarding Item [sn_hr_magnit_user_onboarding_item] table to identify records with **Status** value = **Ready to Send**. The Send onboarding status action in Magnit spoke passes these details to the Magnit application, and a correlation ID is received for all the records that are sent to Magnit system. The records in User Onboarding Item [sn_hr_magnit_user_onboarding_item] table are updated with Correlation_ID, status_sent_at and status_sent.

   Note:

   - Closed and Closed Incomplete states are mapped to Completed in Magnit, and Cancelled is mapped to Rejected in Magnit.
   - Attachments greater than 5 MB are discarded and not sent to Magnit application.

3. The Synchronise Attachments of Onboarding Items flow reads the User Onboarding Item [sn_hr_magnit_user_onboarding_item] table and identifies the last correlation ID and the Verify

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onboarding status action in Magnit spoke identifies the last status sent information. Once the response is identified as completed, the next batch of records (if at all there are any changes in the status of the records) are sent to Magnit application.

Configure HR Service Delivery Integration with Magnit

Configure HR Service Delivery Integration with Magnit to create onboarding tasks for contingent workers.

Before you begin

Role required: sn_hr_magnit.admin

Ensure that the manager profile is available in the ServiceNow AI Platform instance before pulling contingent worker information. Import Location, Department, Job that must be associated to the contingent worker into ServiceNow AI Platform instance (for example, via bulk import). In case, you do not import the corresponding IDs, these values remain null for the contingent employee.

Procedure

1. Map Magnit tasks to create adhoc tasks for contingent workers.
2. Configure properties in Source for HR Service Delivery Integration with Magnit.
3. Activate a schedule flow to pull contingent workers from Magnit application into ServiceNow AI Platform instance.

   A lifecycle event is triggered and a lifecycle case is created for each contingent worker. An HR task is created for each onboarding item within the lifecycle case.

Note:

- If an HR task is not created for onboarding item, verify if an active Magnit mapping record exists for that onboarding item.
- If HR profile, lifecycle case or an HR task is not created for a onboarding item, verify if all Restricted caller access are in **Allowed** state.

Map Magnit tasks

Map an onboarding item name with HR task template to create an adhoc task for the contingent worker.

Before you begin

Role required: sn_hr_magnit.admin

Procedure

1. Navigate to **All** > **HR Magnit Integration** > **Magnit Task Mapping**.
2. On the form, fill in the fields:

Magnit Task Mapping

Field	Description
Onboarding item name	Onboarding item (related to contingent worker) that is pulled from Magnit application.
HR task template	HR task template with which the onboarding item is mapped.

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Field	Description
Active	Option to activate the use of this mapping.

3. Click **Submit**.

Source for HR Service Delivery Integration with Magnit

Once you set up the HR Service Delivery Integration with Magnit application, the source record for HR Service Delivery Integration with Magnit application is automatically created in Enterprise Service Management Integrations Framework, Source module. The Magnit source record in the Enterprise Service Management Integrations Framework application contains a predefined set of properties and HR integration service.

Properties

Value	Description
full_pull_wait_time	Wait time between receiving correlation ID and calling the full pull action. **Note:** This property must be configured. It is a one time configuration.
delta_pull_wait_time	Wait time between receiving correlation Id and calling the delta pull action. **Note:** This property must be configured. It is a one time configuration.
full pull	When set to **true**, active employees onboarded in Magnit are pulled to ServiceNow AI Platform instance along with its associated onboarding items. A lifecycle case is created for the each user along with adhoc tasks based on the onboarding items. When set to **false**, new employees onboarded in Magnit (since the last successful pull) are synchronized to ServiceNow AI Platform instance. Any change in the details of contingent worker in Magnit which are already present in ServiceNow AI Platform is synchronized to the ServiceNow AI Platform via a delta pull. If there are new onboarding items that got associated to the employee after the last pull, new HR tasks are created. **Note:** If there is an active lifecycle case for a contingent worker, then new onboarding tasks are created within the same lifecycle case. If there is no active lifecycle case associated to the contingent worker, then a new lifecycle case is created for the employee and onboarding tasks are created within it. **Note:** full pull is an optional property.

HR Integration Service for HR Service Delivery Integration with Magnit

Once you set up the HR Service Delivery Integration with Magnit application, HR integration service for Magnit is automatically created in Enterprise Service Management Integrations Framework. The flow in HR Integration Service communicates with the Magnit system to pull contingent workers into ServiceNow AI Platform instance.

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HR Integration Services for Magnit

Name	Description
Get Contingent Worker	Pulls contingent workers from Magnit application into ServiceNow AI Platform instance.

Activate a schedule flow

Activate the schedule flow that interacts with Magnit to pull contingent workers from Magnit into the ServiceNow AI Platform instance.

Before you begin

Role required: sn_hr_magnit.admin

Procedure

1. Navigate to **Flow Designer** > **Designer**.
2. Open **Run HRSD Magnit Integration**.
   Alternatively, you can click **Run Job** in Source for HR Service Delivery Integration with Magnit to pull contingent workers from Magnit into the ServiceNow AI Platform instance.
3. Click **Activate**.
4. In the **Trigger** field, specify the time and interval at which you want to automatically run the scheduled flow.

Reference for HR Service Delivery Integration with Magnit

Reference for HR Service Delivery Integration with Magnit.

Components installed with HR Service Delivery Integration with Magnit

Several types of components are installed with activation of the HR Service Delivery Integration with Magnit plugin, including tables, and user roles.

Roles installed

Roles installed with HR Service Delivery Integration with Magnit

Role title [name]	Description	Contains roles
Magnit Admin [sn_hr_magnit.admin]	• Can pull Magnit contingent workers • Can view HR profiles, HR lifecycle case, and HR task created for the contingent worker • Can create Magnit task mapping records	• sn_hr_le.activity_writer • sn_hr_integr_fw.admin • sn_hr_magnit.reader
Magnit Reader [sn_hr_magnit.reader]	Can view HR profile, HR lifecycle case, and HR task created for Magnit contingent worker along with Magnit task mapping records	• sn_hr_integr_fw.admin • sn_hr_magnit.reader

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Tables installed

Tables installed with HR Service Delivery Integration with Magnit

Table	Description
Magnit Task Mapping [sn_hr_magnit_task_mapping]	Store the mappings between onboarding items and HR tasks.
User Onboarding Item [sn_hr_magnit_user_onboarding_item]	Stores the mappings of onboarding items of contingent workers with HR profiles.

Default entities

Default entities are available to use on activating HR Service Delivery Integration with Magnit application.

Default entities

Default entities in HR Service Delivery Integration with Magnit

Entities	Description
New Hire Onboarding (Magnit)	Lifecycle event containing adhoc onboarding tasks that are created for Magnit contingent workers. Default lifecycle activity set and activity are available to use. For more information, see **Lifecycle Events** > **Manage Lifecycle Events**
Onboarding contingent workers (Magnit)	HR Service to trigger the New Hire Onboarding (Magnit) life cycle event.
Contingent workers onboarding (Magnit)	HR template for contingent workers onboarding (Magnit)

HR Service Delivery Integration with Workday

The ServiceNow® HR Service Delivery Integration with Workday application is built by Bristlecone, Inc.

With this application, you can do the following:

- Synchronize worker profiles from Workday to a ServiceNow application.
- Pull Workday tasks into a ServiceNow application. Enable employees to view all their to-dos or tasks in a single place, Employee Center.

Application setup

First, you must activate the HR Service Delivery Integration with Workday application from ServiceNow Store. This automatically activates the Workday HR Spoke. Next you must set up Workday HR Spoke.

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Note:

- HR Service Delivery integration with Workday depends on Workday HR Spoke.
- For the application to work with the ServiceNow Standard Ticket page, you must install these update sets.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Get started

Configure	Use	Reference
Plan and configure your implementation.	Using HR Service Delivery Integration with Workday.	Get details about components like fields, tables, and properties.

Configuring HR Service Delivery Integration with Workday

Pull Workday tasks or to-dos on regular scheduled basis or on manual basis for provided date range into ServiceNow instance. This allows the employees to view all their to-dos in a single place, Employee Center.

Application setup

- Activate the HR Service Delivery Integration with Workday application from ServiceNow Store. This automatically activates the Workday HR Spoke.
- Set up Workday HR Spoke Workday HR Spoke .
- Activate the HR Service Delivery Integrations Framework from ServiceNow Store. HR Service Delivery Integration with Workday uses Enterprise Service Management Integrations Framework to pull tasks from Workday into ServiceNow. For more information on HR Service Delivery Integrations Framework, see Enterprise Service Management Integrations Framework.

To-dos settings

Store one-time configuration parameters for pulling tasks from Workday into ServiceNow. For more information, see Configure Workday to-dos.

Note: The **HRSD Framework Integration** and **HRSD Integration Framework Complete** to-dos configurations help to display Workday tasks in the To-dos page in Employee Center. For more information on these to-dos configurations, navigate to **Employee Center** > **To-dos Configuration**.

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Schedule flow activation

Activate and run the schedule flow that pulls tasks into ServiceNow. For more information, see Activating schedule flows.

Synchronize worker profiles

Pull worker profile data from Workday into ServiceNow. View worker profile details from Workday in ServiceNow HR Service Delivery.

The following sections explain how to set up the application, configure worker profile settings, activate and run the schedule flow to synchronise worker profiles.

Application setup

First, you must activate the HR Service Delivery Integration with Workday application from ServiceNow Store. This automatically activates the Workday HR Spoke. Next, you must set up Workday HR Spoke.

Worker profile settings

Store one-time configuration parameters for synchronizing data between Workday and ServiceNow. For more information, see Configure worker profile settings.

Note: Even if you are not using Worker profile synchronization, ensure that you have configured the **Workday tenant time zone** field in the Workday Worker Profile Sync Configurations form. This field handles the time zones between the two systems, ServiceNow and Workday.

Schedule flow activation

Activate and run the schedule flow that pulls Worker profile information into ServiceNow. For more information, see Activating schedule flows.

Configure worker profile settings

Configure parameters to ensure that worker profiles are synchronized between Workday and ServiceNow.

Before you begin
Role required: sn_hr_workday.admin

Procedure

1. Navigate to **Workday Worker Profile Sync** > **Configurations** > **Worker Profile Sync Configurations**.
2. Update the fields in the record as per your requirements.

Important: For details on how to get the value for each of the fields in the form, refer to this KB article.

Workday Worker Profile Sync Configurations form

Field	Description
Workday tenant time zone	Time Zone of Workday workers.

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Field	Description
Number of days to look ahead for upcoming onboarding and offboarding events	Number of days that is considered to pull the profiles of future workers who are onboarding or off boarding.
Department organization type ID	Unique identifier for the department organization type.
Location usage ID	Unique identifier for the location usage.
Location phone device type ID	Unique identifier for the location phone device type.
Location fax phone device type ID	Unique identifier for the location fax phone device type.
Location communication usage type ID	Unique identifier for the location communication usage type.
Enable dry run	When enabled, data is pulled into staging tables, but is not transformed to target tables.
Enable debugging	When enabled, additional logs are collected.
Worker home email communication usage type ID	Unique identifier for the worker home email communication usage type.
Worker work email communication usage type ID	Unique identifier for the worker work email communication usage type.
Worker work phone communication usage type ID	Unique identifier for the worker work phone communication usage type.
Worker home phone communication usage type ID	Unique identifier for the worker home phone communication usage type.
Worker mobile phone device type ID	Unique identifier for worker mobile phone device type.
Worker phone device Type ID	Unique identifier for worker phone device type.
Worker Home Address Type Reference Communication Usage Type ID	Unique identifier for worker home address.

3. Click **Submit**.

What to do next
Click the Get Reference ID Types related link to run the flow that interacts with Workday to pull the reference ID types that are referenced in the configuration fields.

Configure properties for Worker profile synchronization

Set the properties that control Worker profile synchronization.

Before you begin
Role required: sn_hr_workday.admin

Procedure

Navigate to **System Properties** and set the following property values:

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Worker profile synchronization properties

Property	Description
sn_hr_workday.worker_service_flow_name	Provide name of the sub flow that is cloned from Get Worker Service. The format must be `scope-name.flow-name`.
sn_hr_workday.worker_page_size	Specify the page size for Get Workers Service. The maximum page size can be `999`.
sn_hr_workday.exclude_contingent_workers	Set the value to **True** to exclude the contingent workers from the Workers pull. The default value is **False**.

Mapping worker profile fields

The Run Workday Integration Flow schedule flow maps Worker profile fields from Workday to the HR profile fields in ServiceNow.

Important:

- For details on fields that are mapped, refer to this KB article.
- Create an index on the first_name, last_name columns of HR profile to improve performance.

Integrate Workday professional worker profiles

Bring-in professional worker profile data from Workday into ServiceNow. View professional worker profile details from Workday in ServiceNow HR Service Delivery.

Note:

- Professional worker profiles data is additional to the existing employee profile data. So, make sure you have the employee data available in your ServiceNow instance.
- You need an active Employee definition to generate employee profiles. For more information, see Create an active employee definition.

The following steps show how the professional worker profile data is imported into ServiceNow:

- Activating and running the schedule flow **Run Workday Integration Flow** which contains the professional worker profile flow. For more information, see Activating schedule flows.
- Selecting the **Professional worker profile** check box that activates the **Get Professional Worker Profile** subflow.
- Activating **Get Professional Worker Profile Service**.
- Initiates the **Look up Professional Profiles Stream** action.
- Pulling data into the staging tables, and transform maps move data into target tables. For more information, see Use transform maps.
- Controlling access to the HR profile table with six Restricted caller access privileges (RCAs).

Configure Workday to-dos

Store one-time configuration parameters to pull tasks from Workday into the ServiceNow application.

Before you begin

Role required: sn_hr_workday.admin

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Procedure

1. Navigate to **All** > **Workday Pull To-dos** > **Configuration Pull To-dos**.
   For information on the Pull to-dos report creation, see this KB article.
2. On the form, fill in the fields:

Workday Configuration Pull To-Dos

Field	Description
Workday to dos RAAS report name	Name of the report that is pulled from Workday. **Note:** Make sure you provide the exact name of the report for proper synchronization.
Workday to dos report owner username	Owner of the report. **Note:** Make sure you provide the exact name of the owner for proper synchronization.
Initial load start date time	Date and time from which you want to pull todos from Workday into ServiceNow.
Load Interval	Interval in which you want to pull data, for example, in terms of days or months or hours. Example: For initial load, if you want to pull data from the last six months, then you can set the load interval as 15 days. Data is pulled from the last six months (in a set of 15 days) till the starting time captured in the **Job Started at** field in Job tracker. In case the data is large, an outbound call timeout error is displayed in ServiceNow. You must then decrease the load interval. If a schedule flow is run for every 12 hours, then data is always pulled till current time.

Activating schedule flows

Activate the schedule flow that interacts with Workday to pull worker profile information and tasks into a ServiceNow application.

Before you begin

Role required: sn_hr_workday.admin

Procedure

1. Navigate to **Flow Designer** > **Designer**.
2. Open **Run Workday Integration Flow**.
3. In the Trigger section, specify the time and interval at which you want to automatically run the scheduled flow.
4. In Actions section, expand **Call Run Workday Service Subflow**.
5. Select the data that you want to pull.
   You have the following options:

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- **Department**
- **Location**
- **Job Profile**
- **Worker Profile**
- **Effective Worker Profile**
- **Future Worker Profile**
- **Retrieve All Data**
- **Pull To-dos**
- **Professional worker profile**

Note:

- For a partial pull, deselect the **Retrieve all data** check box. Only modified data (based on the last successful schedule run time) is pulled from Workday into the ServiceNow instance. Partial pull is not supported for Department and Location. It is only supported for HR profile and Job Profile.
- For a full pull, select the **Retrieve all data** check box. All the data is pulled from Workday into the ServiceNow instance.
- The **Retrieve All Data** check box is not supported for **Pull To-Dos**. The first pull will always be a full pull based on the configuration parameter **Initial Load Date time**. The subsequent ones are incremental pulls.
- Before you run the flow, turn off reporting: **com.snc.process_flow.reporting.level**.

6. Select **Done**.
7. Select **Activate**.

Result

The flow is activated after all the trigger conditions are met. The schedule flow pulls data in the following order:

- Locations
- Departments
- Job profile
- Workers
- Future workers
- Effective workers
- Jobs

Once data is pulled into staging tables, transform maps move data into target tables. For more details, refer to Use transform maps.

Using HR Service Delivery Integration with Workday

Understand how you can use HR Service Delivery Integration with Workday to process employee information at ServiceNow.

Use transform maps

Transform maps specify data relationships between source table and target table.

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For details on the transform maps, navigate to **System Import Sets** > **Administration** > **Transform Maps**.

Transformation Maps

Name	Description
Job Profile Transform Map	Maps job profiles from the Job Profile Staging [sn_hr_workday_job_profile_staging] table to the Job Profile [sn_hr_core_job_profile] table.
Location Transform Map	Maps locations from the Location Staging [sn_hr_workday_location_staging] table to the Location [cmn_location] table.
HR Profile Transform Map	Maps workers, future workers, and effective workers from the HR Profile Staging [sn_hr_workday_hr_profile_staging] table to the HR Profile [sn_hr_core_profile] table.
Department Transform Map	Maps departments from the Department Staging [sn_hr_workday_department_staging] table to the Department [cmn_department] table.
HR Job Transform Map	Maps jobs from the HR Job Staging [sn_hr_workday_hr_job_staging] table to the Job [sn_hr_core_job] table.
HRSD Workday Pull Inbox Items	Maps to-dos from the Workday Integration Todos Staging [sn_hr_workday_todo_staging] table into the Workday Todos [sn_hr_workday_todo] table.
HRSD Workday Professional Profile Transform Map	Maps professional worker profiles from the Staging table [sn_hr_workday_professional_profile_staging] to the Professional profile table [sn_professional_profile].
HRSD Workday Certifying Board Code	Maps board code from the Staging table [sn_hr_workday_certifying_board_code_staging] to the Workday Certifying Board Code table [sn_professional_certifying_board_code].
HRSD Workday Education and Training	Maps education and training from the Staging table to the Workday Education and Training table [sn_employee_education_training].
HRSD Workday Other Name	Maps other name from the Staging table [sn_hr_workday_other_name_staging] to the Workday Other Name table [sn_professional_other_name].
HRSD Workday Practice Location	Maps practice location from the Staging table [sn_hr_workday_practice_location_staging] to the Workday Practice Location table [sn_professional_practice_location].
HRSD Workday Employee Employment History	Maps employment history from the Staging table to the Workday Employee Employment History table [sn_employee_employment_history].
HRSD Workday Professional Reference	Maps professional reference from the Staging table [sn_hr_workday_professional_reference_staging] to the Workday Professional Reference table [sn_professional_reference].

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Transformation Maps (continued)

Name	Description
HRSD Workday Professional Specialty Detail	Maps professional specialty detail from the Staging table [sn_hr_workday_professional_specialty_detail_staging] to the Workday Professional Specialty Detail table [sn_professional_specialty_detail].
HRSD Workday Languages Spoken	Maps languages spoken from the Staging table [sn_hr_workday_languages_spoken_staging] to the Workday Languages Spoken table [sn_employee_languages_spoken].

View job tracker details from Workday

Track every pull that has been performed from ServiceNow to Workday either by schedule job or manual reconciliation process. View details of the job, such as when did the job begin and end, when did the records start loading into staging tables, or did the job run completely or fail in between.

Before you begin

Role required: sn_hr_workday.admin

Procedure

1. Navigate to **All** > **Workday Worker Profile Sync** > **Job Tracker** > **Workday Integration Job Tracker**.
2. View job details.

Workday Integration Job Trackers form

Field	Description
Job name	Name of the job that has run.
Job started at	Date and time when the job started.
Job ended at	Date and time when the job ended.
State	Current state of the job, such as **Complete** and **Failed**.
Error message	Message displayed when the job has failed.

3. Select a job record.

   In the **Workday Integration Service Job Trackers** related list, view the service job details.

Workday Integration Service Job Trackers form

Field	Description
Number	Unique identifier for the service job run.
Workday Integration Service	Name of the service job that has run. For example, Worker Profiles integration service.
Job state	Current state of the service job. For example, Completed or Failed.
Job started at	Date and time when the service job run started.
Job ended at	Date and time when the service job run ended.

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Field	Description
Error Source	Phase during which the error has occurred: API Error, Transformation Error, or Configuration Error.
Error Message	Message displayed when the job has failed.
Start Date Time-API Parameter	Date after which the modified records are pulled from Workday into ServiceNow.
End Date Time-API Parameter	Date until which the modified records are pulled from Workday into ServiceNow.
Import Set	Name of the import set that is pulled.

View tasks from Workday

View details of the todos or tasks that are pulled from Workday into ServiceNow.

Before you begin

Role required: admin, sn_hr_workday.admin

Procedure

1. Navigate to **All** > **Workday Pull To-Dos** > **Workday To-Dos**
2. On the form, view the fields.

Workday Todos

Field	Description
Integration todo ID	Unique identifier for the Workday task.
Active	Option indicating whether the task is active in Workday.
Assigned to	User to whom the task is assigned.
Todo state	Current state of the task in ServiceNow. For example, **Open**, and **Complete**.
URL	URL that navigates to Workday to complete the task.
Todo description	Description of the Workday task visible in ServiceNow Employee Service Center .
Due date	Date and time by which the task has to be completed.
External status	Current status of the task in Workday. For example, **Awaiting Action**, and **Cancelled**.
Extension system	Option indicating the origin of the task, that is Workday.

Reference - HR Service Delivery Integration with Workday

Reference topics provide additional information about the HR Service Delivery Integration with Workday, including lists and forms.

Components installed with HR Service Delivery Integration with Workday

Several types of components are installed with activation of the HR Service Delivery Integration with Workday (sn_hr_workday) application, including tables and user roles.

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Demo data is available for this feature.

Roles installed

Roles installed with HR Service Delivery Integration with Workday

Role title [name]	Description	Contains roles
HR Workday Admin [sn_hr_workday.admin]	• Can access all features and capabilities of the HR Service Delivery Integration with Workday application. • Can configure worker profile settings.	• flow_operator • import_admin • sn_hr_workday.user

Scheduled flows installed

Scheduled flows installed with HR Service Delivery Integration with Workday

Scheduled flow	Description
Run Workday Integration Flow	Pulls data from Workday to ServiceNow. By default the flow is in inactive state. For information on how to activate the flow, see Activating schedule flows.

Tables installed

Tables intalled with HR Service Delivery Integration with Workday

Table	Description
Workday Worker Profile Sync Configuration [sn_hr_workday_configuration_worker_profile_sync]	Stores one-time configuration parameters for the initial setup of the HR Service Delivery Integration with Workday application. These parameters ensure that worker profile information is pulled from Workday into the ServiceNow application.
Workday Integration Job Tracker [sn_hr_workday_job_tracker]	Tracks every job pull that has been performed from the ServiceNow application to Workday either by schedule job or manual reconciliation process.
Workday Integration Service Job Tracker [sn_hr_workday_service_job_tracker]	Tracks every service job pull that has been performed from the ServiceNow application to Workday either by schedule job or manual reconciliation process.

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Tables intalled with HR Service Delivery Integration with Workday (continued)

Table	Description
Workday Todos [sn_hr_workday_todo]	Stores todos that are pulled from Workday.
Workday Configuration Pull To-Dos [sn_hr_workday_pull_todo_config]	Stores parameters or inputs which help in setting up the todos configuration.

Worker profile synchronization limitations

Limitations to the data that is synchronized from Workday to ServiceNow.

- Partial pull is not supported for Department and Location. It is only supported for HR profile and Job Profile.
- When an organization, a location, and a job profile is made inactive in Workday, it does not become inactive in ServiceNow. This is because the Department table, Location table, and Job profiles table in ServiceNow do not have the **Active** field to record the status information.
- The following fields are not mapped while synchronizing HR profiles:
  - Under Employee Information: Leave status, Location type, Notice period, Probation end date, Probation period, Social Security number, and Business.
  - Under Jobs: Location type and Work email.

HR Service Delivery Advanced Integration with Workday

The ServiceNow® HR Service Delivery Advanced Integration with Workday application is built by Bristlecone, Inc.

HR Service Delivery Advanced Integration with Workday enables you to complete the following tasks:

As an advanced Workday administrator

- Configure templates to display customized Total Rewards information to employees in the configured Service Portal. See Set up Total Rewards using Workday.
- Configure legal name change settings to enable employees to change their legal name from Employee Center. See Legal name change configuration.
- Import time offs, holiday calendars, and schedule calendars from Workday into the ServiceNow application enabling employees to submit a time-off request from Employee Center. See Time off request to Workday.

As an employee

- Submit your time-off request from Employee Center. See Request a time off.
- Change your legal name through virtual agent conversation in Employee Center. See Change legal name through Virtual Agent.
- Report discrepancy in your Workday payslip from Employee Center. See Report an issue with your payslip.

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- View your Total Rewards information (such as benefits, compensation, and allowances) in the configured Service Portal.
- View your holiday calendars in the configured Service Portal.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Get started

Configure	Use	Reference
		
Plan and configure your integration.	Using the HR Service Delivery Advanced Integration with Workday application.	Get details about components like tables, user roles, and scheduled jobs.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Configuring

Configure HR Service Delivery Advanced Integration with Workday.

Application setup

First, you must activate the HR Service Delivery Advanced Integration with Workday application from ServiceNow Store, which automatically activates the Workday HR Spoke. Next, set up Workday HR Spoke Workday HR Spoke , and install the following applications:

- Glide Virtual Agent plugin [com.glide.cs.chatbot]
- Human Resources Scoped App: NLU Model[com.sn_hr_nlu_model]
- Human Resources Scoped App: Core [com.sn_hr_core]

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Important:

- The HR Service Delivery Advanced Integration with Workday application is built on Workday web service version 33.2. The application may not be compatible with the previous or later versions of Workday web service version 33.2.
- For the application to work with the ServiceNow Standard Ticket page, you must install these update sets : **standard_ticket_rca**
- For the application to work with Human Resource: Core, you must install these update sets : **human_resources_core_rca**
- For the application to work with Human Resources: Service Portal, you must install these update sets : **human_resources_portal_rca**

Set up Total Rewards using Workday

Configure the Total Rewards templates by choosing plans, sections, and target audience. Display a customized Total Rewards widget to employees in the configured Service Portal.

Before you begin

Role required: sn_hr_workday_adv.admin

Configure the required reports for the Total Rewards functionality. See Configure reports HR Service Delivery Advanced Integration with Workday.

Procedure

1. Set up plans to include in sections in Total Rewards Template.
   For more information, see Set up plans for Total Rewards.
2. Set up sections to include in Total Rewards Template.
   For more information, see Set up sections for Total Rewards templates.
3. Set up Total Rewards template by choosing sections, and target audience.
   For more information, see Set up a template for Total Rewards.

What to do next

1. Navigate to **Service Portal** > **Service Portal Configuration** > **Designer**. Display the Total Rewards view to employees by adding the **View Workday Total Rewards** widget to the required Service Portal.
2. Configure the system property, **sn_hr_workday_adv.workday_total_rewards.currency_code**, which stores the currency code to call the Total Rewards RAAS (Report As A Service) based API. The default value of the property is **USD**.

Set up plans for Total Rewards

Complete the one time set up of pulling plans, such as employee benefits plan, compensation plan, insurance plan, from Workday into the ServiceNow application.

Before you begin

Role required: sn_hr_workday_adv.admin

Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Total Rewards** > **Plans Available**.
2. Click **Get Reference IDs** to pull the plans from Workday into ServiceNow tables.

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Note: The plans from Workday are pulled into Workday Reference ID List Staging [sn_hr_workday_adv_reference_id_list_staging] table and from staging table into Workday Reference ID List [sn_hr_workday_adv_reference_id_list] table.

3. On the form, view the fields:

Workday Reference ID Lists form

Field	Description
Descriptor	Description of the plan that is pulled from Workday.
Descriptor ID	Descriptor ID of the plan that is pulled from Workday.
Workday ID	Unique identifier that is generated from Workday.
Reference ID Type	Reference ID of the plan that is pulled from Workday. For example, Compensation Plan ID, Health Care Coverage Plan ID, and Insurance Coverage Plan ID.

Set up sections for Total Rewards templates

Create sections and associate plans to it. Add those sections to Total Rewards Template.

Before you begin

Role required: sn_hr_workday_adv.admin

Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Total Rewards** > **Plans Available**.
2. Click **New**.
3. On the form, fill in the fields:

Total Rewards Section Setup form

Field	Description
Section name	Name of the section. For example: Allowances.
Plans	Plans that you want to include in the section. For example, Allowance - Car, Allowance - Mobile, and Allowance - Housing

4. Click **Submit**.

Set up a template for Total Rewards

Set up a template by adding sections to it. Templates enable you to display a customized Total Rewards view to employees in the configured Service Portal.

Before you begin

Role required: sn_hr_workday_adv.admin

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Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Total Rewards** > **Template Set up**.
2. Click **New**.
3. On the form, fill in the fields:

Total Rewards Template Setup form

Field	Description
Template name	Suitable name of the template.
Sections	Sections that you want to include in the template, for example, Base Pay, Allowances, Incentive Pay, and Commission.
Applies to	Template applies only to the selected user criteria. For example, the template is applicable only to employees whose Employment Type Is Full Time.
Order	If more than one template is applied to an employee, only the template with a lesser order is displayed to the employee in the configured Service Portal.
Domain	Reference to domain.

4. Click **Submit**.

Legal name change configuration

Complete the legal name change configuration to allow employees to change their legal name through virtual agent conversation in Employee Center.

Before you begin

Role required: sn_hr_workday.admin

Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Legal Name Change** > **Document Categories**.
2. To pull the legal name change document categories from Workday into a ServiceNow application, click **Get Reference IDs**.
   A data source with a predefined script imports document categories into the Workday Reference ID List Staging [sn_hr_workday_adv_reference_id_list_staging] table and from staging table into the Workday Reference ID List [sn_hr_workday_adv_reference_id_list] table.

What to do next

1. Navigate to **Workday Advanced Use Cases** > **Legal Name Change** > **Configuration**.
2. On the Legal Name Change Configurations form, click **New**.
3. To allow an employee to upload the name change document in Virtual Agent conversation in Employee Center, click the **Enable document upload** option and select a relevant document category.
4. Click **Submit**.

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Configure reports HR Service Delivery Advanced Integration with Workday

Configure the necessary reports to pull data, such as time offs plans, time off reasons, holiday calendar WID, and work schedule calendar WID, from Workday into the ServiceNow tables.

Important: Only a Workday administrator can create reports in Workday. A ServiceNow administrator must collect the report details from a Workday administrator.

Time off use case

To use the Time off request functionality, create the following reports:

- Absence table reasons
- Absence table tiers
- Absence tables
- Get holiday calendar WID
- Get work schedule calendar WID
- Time off plans
- Time off reasons
- Time off types
- Time offs

Note: For information about the Time off request functionality, see Time off request to Workday.

Payroll use case

To use the Payslip discrepancy functionality, create the Look up payslip report.

Note:

- For information about the Payslip discrepancy functionality, see Report an issue with your payslip.
- For information about the Look up payslip report creation, see this KB article.

Total rewards use case

To use the Total rewards functionality, create the Total Rewards report.

Note:

- For more information about the Total rewards functionality, see Set up Total Rewards using Workday.
- For information about the Total Rewards report creation, see this KB article.

Holiday calendar use case

To use the Holiday calendar functionality, create the Get holiday calendar WID report.

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Note:

- If you have already created Get holiday calendar WID report for the Time off request functionality, creating another report of Get holiday calendar WID is not required.
- For more information about the Holiday Calendars functionality, see Holiday calendars.
- For information about the Holiday Calendar report creation, see this KB article.

Configure Virtual Agent topics for HR Service Delivery Advanced Integration with Workday

Complete the configuration steps to enable your employees place requests to the Workday system using the Now Assist for HRSD Virtual Agent topics in Employee Center.

Before you begin

Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

Procedure

1. Install the HR Service Delivery Advanced Integration with Workday, Now Assist for HRSD, and Enterprise Service Management Integrations Framework (v3.6) applications from ServiceNow Store.
2. Configure the Workday HR Spoke to pull data from Workday system.
3. Create subflows aligning with Template Integration Gateway.
   See Create a subflow using Template Integration Gateway.

   Note: You can use the default subflows that have been created for Workday for the Request Time off and Get Time Off Balance Virtual Agent topics.

4. Configure Integration Provider Mapping (Decision table) by adding input choices and configuring conditions on input choices and results.
5. Create a Virtual Agent topic block:

   Note: The Virtual Agent topics are available by default with the Now Assist for HRSD scope.

   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. From the **LLM Assistant** list, select **Now Assist in Virtual Agent**.
   c. Select a Virtual Agent topic.
      i. Edit topic properties, make the necessary edits in the topic, such as update the node name, and response message.
      ii. In Integration Gateway, specify the appropriate feature, service name, user, and make the necessary edits.

What to do next

When an Virtual Agent topic invokes the Integration Gateway subflow, the subflow reviews input values in Integration Provider Mapping (Decision table) to execute results.

Configure HCM AI agents for HR Service Delivery Advanced Integration with Workday

Configure HCM AI agents to enable employees to place requests to the Workday system using the HR Service Delivery AI agent collection.

Before you begin

View Subflow-agent mapping for HR Service Delivery Advanced Integration with Workday.

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Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

Procedure

1. Install the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).
   For more information, see Configure Now Assist for HR Service Delivery (HRSD).
2. Activate the [Enterprise Service Management Integrations Framework] application from the ServiceNow® Store.
3. Configure the Workday HR Spoke to pull data from Workday system.
4. Create subflows aligning with Template Integration Gateway.
   For more information, see Create a subflow using Template Integration Gateway.

   Note: You can also use the default subflows that have been created for Workday.

5. Add input choices and define conditions and results in a decision table for the Integration Gateway subflow.
   For more information, see Configure Integration Provider Mapping (Decision table).
6. Duplicate AI agents available for Workday to run them autonomously.
   For more information, see Duplicate an AI agent.

   Note: In the Toggle display section, ensure the toggle beside Virtual Agent is enabled.

Using

Understand how you can use HR Service Delivery Advanced Integration with Workday to process advanced employee information at ServiceNow.

Time off request to Workday

You can submit a time off request to Workday from Employee Center.

The following sections explain how to configure time off settings, and raise a time off request from Employee Center.

Time off settings

- Configure the reports for time offs, absence tables, holiday calendars, and work schedule calendars. See Configure reports HR Service Delivery Advanced Integration with Workday.
- Import set up data for time offs. See Time offs.
- Get Holiday Calendars from Workday. See Holiday calendars.
- Get Work Schedule Calendars from Workday. See Work schedule calendars.

Time off request

Request a time off to Workday from Employee Center. For more information, see Request a time off.

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Limitations

- Custom validations that are supported in Workday are not handled in the ServiceNow application. For example, if an organization has a time off plan configured to enter time off quantity in multiples of 2 or 4, such validations are not supported for such time off plans in the ServiceNow application.
- A maximum of 25 days of leave, including holidays and non-working days, can be applied from the ServiceNow application.

Time offs

Complete the one time set up of pulling time offs from Workday into the ServiceNow application.

Before you begin

Role required: sn_hr_workday.admin

Configure the required reports for the Time Off request functionality. See Configure reports HR Service Delivery Advanced Integration with Workday.

Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Time Off Request** > **Time Off Types**.
2. Click **Import time off setup data**.
3. Click **Submit**.

What to do next

1. Navigate to **Service Catalog** > **Catalog Definitions** > **Content Items**.
2. Configure the URL of time off request page in Workday.
3. Open the Time Off Request – Link to Workday record and modify the URL field.
4. Navigate to Employee Service Center. In the Catalog menu, open **Benefits Category** > **Time Off Request –Link to Workday**. You are directed to the Workday Time Off request page.

Work schedule calendars

Pull work schedule calendars from Workday into the ServiceNow application.

Before you begin

Role required: sn_hr_workday.admin

Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Time Off Request** > **Work Schedule Calendar**.
2. Click **Get Work Schedule Calendars** to run a flow that pulls schedule calendars from Workday into the ServiceNow application.

Work Schedule Calendars form

Field	Description
Work schedule calendar	Name of the work schedule calendar. For example, Standard 40 Hour Week.
Work schedule calendar ID	Unique identifier of the work schedule calendar that is pulled from Workday.

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Field	Description
Work week start day	Day in a week when the work schedule calendar begins.
Work week start day ID	ID of the day in a week when the work schedule calendar begins.
Start time	Time when the work schedule begins for the day.
End time	Time when the work schedule ends for the day.
Day of week	Day in a week in a work schedule calendar.
Day of week ID	ID of a day in a week in a work schedule calendar.
Domain	Reference to domain.

3. Click **Submit**.

Holiday calendars

Pull holiday calendars from Workday into the ServiceNow application. Display the Holiday Calendar widget to employees in the configured Service Portal.

Before you begin

Role required: sn_hr_workday.admin

Configure the Get holiday calendar WID report. For more information, see Configure reports HR Service Delivery Advanced Integration with Workday.

Procedure

1. Navigate to **All** > **Workday Advanced Use Cases** > **Time Off Request** > **Holiday Calendars**.
2. Click **Get Holiday Calendars** to run the subflow that interacts with Workday to pull holiday calendars.
3. To create a holiday calendar, click **New**.

Holiday Calendar form

Field	Description
Calendar event name	Name of the holiday event. For example, Holidays for Argentina.
Holiday calendar ID	ID for the holiday calendar that is pulled from Workday.
Holiday calendar WID	Unique identifier of the holiday calendar that is pulled from Workday.
Domain	Reference to domain.
Start date	Start date of the calendar event.
Start time	Start time of the calendar event.
End date	End date of the calendar event.
End time	End time of the calendar event.
Holiday Calendar name	Name of the holiday calendar. For example, Christmas day.

4. Click **Submit**.

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What to do next
Display holiday calendar widget to employees.

1. Navigate to **Service Portal** > **Service Portal Configuration** > **Designer**.
2. In widget, select the **View Workday Holiday Calendar** and add it to the required Service Portal page.

Request a time off

Request a time off to Workday from Employee Center.

Before you begin

- Role required: none
- You might not be able to submit a time off request if your HR profile does not have a valid employee number and employment type.

Procedure

1. Navigate to **All** > **Employee Center** > **Catalogs** > **Benefits**.
2. Click **Time Off Request**.
3. In the **Time off start date** field, specify the date from which you are applying the time off.
4. In the **Type of time off** field, specify the type of time off you are availing.
   For example, USA sick plan leaves plan, or Mexico leave plan.
5. In the **How many days do you to want to take off** field, specify the number of days for which you are applying time off.
6. In the **Time off per day** field, specify value for the time off in hours or days.

   Note: The **Unit of Time** field auto-populates the unit of time (days or hours) for the time off.

7. Click **Submit**.
   An HR case is created. If the time off is submitted successfully, the HR case changes to Closed complete state. If the time off is not submitted successfully, the HR case changes to Closed Incomplete state.

Change legal name through Virtual Agent

Change your legal name change through Virtual Agent chat in Employee Center.

Before you begin
Role required: none

Procedure

1. Navigate to Employee Center.
2. Click Virtual Agent.
3. Enter a text.
   For example, name change. Your current first name and last name are displayed.
4. To continue with the legal name change in Workday, press **Yes**.
5. Enter a first name, a last name, and a middle name.
6. Upload the supporting legal name change document.

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Note: The option does not appear if it is not configured by your administrator.

7. Enter a description for the uploaded legal name change document.
8. Review your updated legal name changes and supporting document and press **Yes**.
   An HR case is created and the chat conversation is ended.

Publish the VA topic template for legal name change

Publish the Workday Legal Name Change Template which contains an NLU model that recognizes and processes employee utterances, intentions (intents), and objects of, or contexts for, an action (entities).

Before you begin

Role required: sn_hr_workday.admin

Procedure

1. Navigate to **All** > **Collaboration** > **Virtual Agent** > **General Settings**.

   Note: The **Enable NLU model** toggle switch must be enabled.

2. Navigate to **Collaboration** > **Virtual Agent** > **Designer**.
3. Select **Workday Legal Name Change Template**.
4. Click **Publish**.

Report an issue with your payslip

Report an issue with your Workday payslip from Employee Center.

Before you begin

- Role required: none
- You might not be able to report payslip discrepancy if your HR profile does not have a valid employee number and employment start date.

Procedure

1. Open Employee Center.
2. Navigate to **Catalog** > **Payroll** > **Payroll Discrepancy - Workday**.
3. In the **Payroll year** field, select the year in which the payslip was generated.
4. In the **Payroll month** field, select the month in which the payslip was generated.
5. In the **Payment date** field, select the date on which the payslip was generated
6. In the **How can we help you with this payslip** field, specify the discrepancy that is found in the payslip.
7. Click **Submit**.
   An HR case is created that is in Ready state.

Now Assist Virtual Agent topics for HR Service Delivery Advanced Integration with Workday

You can use the Now Assist Virtual Agent topics in Employee Center to place requests, for example, apply for a time off or update your details from the Workday system in Employee Center.

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Virtual Agent topics for HR Service Delivery Advanced Integration with Workday Overview

To access and use the Virtual Agent topics, verify the following:

- Configure Virtual Agent topics for HR Service Delivery Advanced Integration with Workday.
- Have one of the following roles: admin, sn_hr_sp.hrsp_alumni, sn_hr_sp.hrsp_contingent, sn_hr_sp.hrsp_employee, sn_hr_sp.hrsp_contractor, or sn_hr_sp.admin

Available Spoke Subflows for Virtual Agent topics for HR Service Delivery Advanced Integration with Workday

Spoke subflow-topic mapping

Virtual Agent Topic	Feature Name	Service Name	Subflow
Lookup Worker Profile	Worker Management	Get Worker	Workday HR - Lookup Worker Profile
Request Time Off	Leave Management	Time off balance	Workday HR - Get Time off balance
		Create Time Off Request	Workday HR - Request Time Off
Get Time Off Balance		Time Off Balance	Workday HR - Get Time Off Balance
Get Holiday Calendar		Holiday Calendar	Workday HR - Get Employee Holiday Calendar
Get Total Rewards	Benefits Management	Total Rewards	Workday HR - Get Total Rewards
Get User Pay Checks	Payroll Management	Get Paychecks	Workday HR - Get Employee Paychecks
• Update Email Address • Update Address • Update Phone Number • Update Date of Birth • Update Blood Type	Human Capital Management	Update Personal Details	Workday HR - Update Personal Details
	Worker Management	Get Worker	Workday HR - Lookup Worker Profile

Lookup Worker Profile

The Lookup Worker Profile Virtual Agent topic enables you to view the profile of a coworker. From Employee Center, open a chat window and type in key words, for example, worker profile. After you have specified the details of coworkers, worker profile details of one or more users are displayed.

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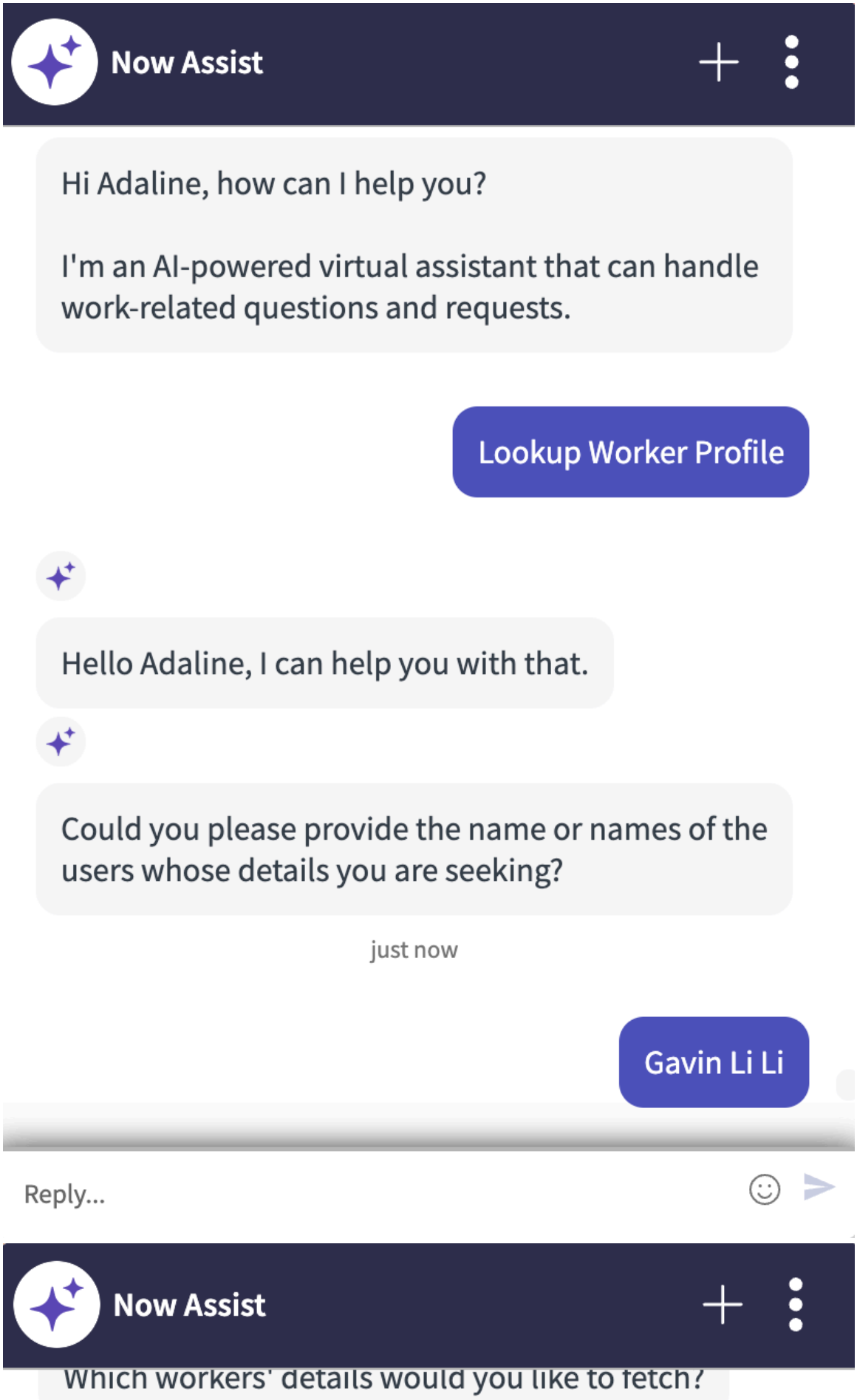

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Update Personal Details

You can update personal details in Virtual Agent using one of the following topics in Employee Center from the Workday system.

- Update Address
- Update Date of Birth
- Update Email Address
- Update Phone Number
- Update Blood Type

Get User Paychecks

The Get User Paychecks Virtual Agent topic enables you to view your payslip details. From Employee Center, open a chat window and type in key words, for example, get payslips. After you provide the required details such as start date and end date, your payslip summary, in the form of pay period, gross pay, deductions, and net pay are displayed. A detailed breakdown of deductions is also displayed.

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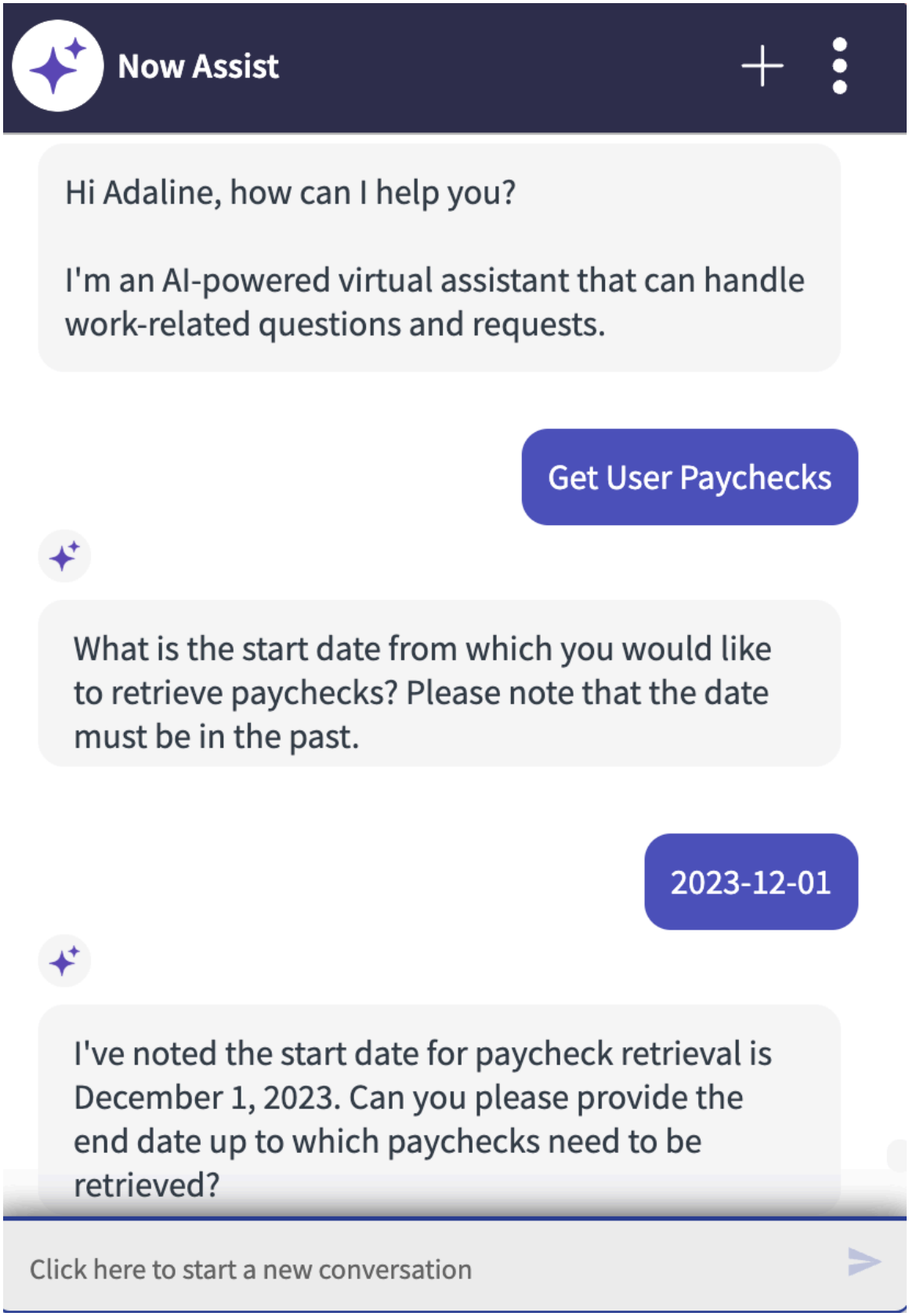

Get Total Rewards

The Get Total Rewards Virtual Agent topic enables you to view your rewards. From Employee Center, open a chat window and type in key words, for example, rewards.

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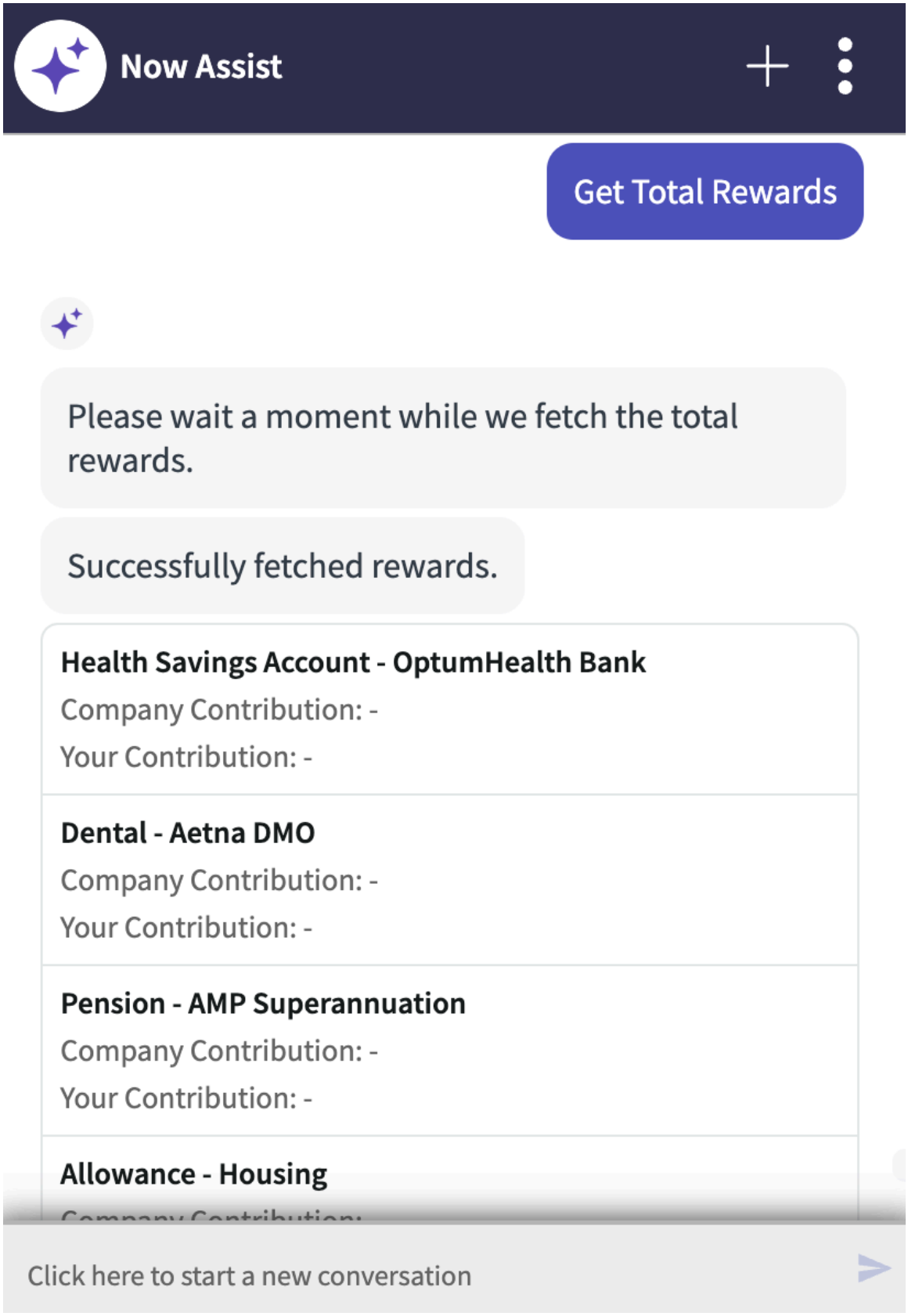

Get Time Off Balance

The Get Time Off Balance Virtual Agent topic enables you to view your leave balance. From Employee Center, open a chat window and type in key words, for example, leave balance.

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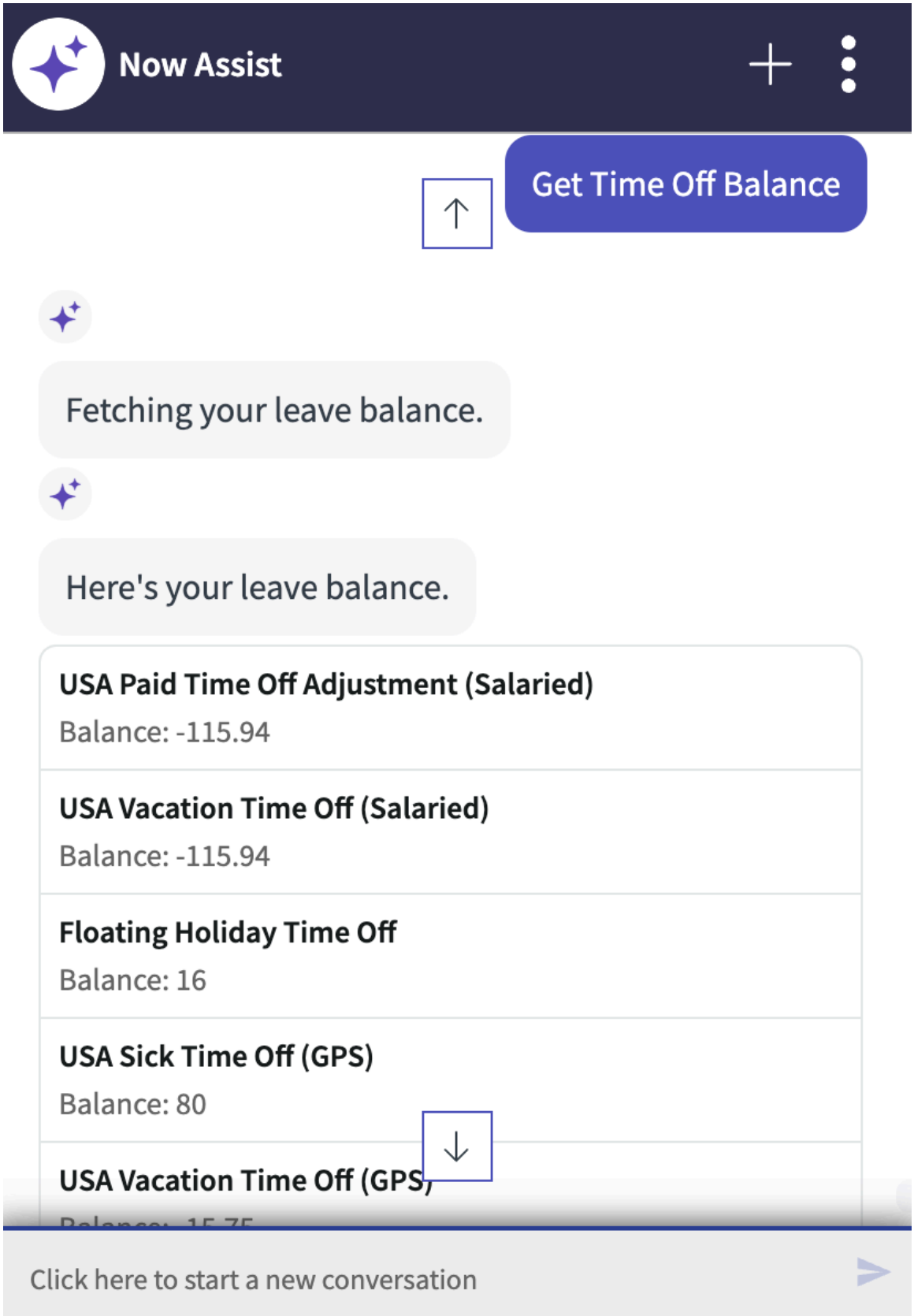

Request Time Off

The Request Timeoff Virtual Agent topic enables you to apply for leaves. From Employee Center, open a chat window and type in key words, for example, request time off. After you have

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specified required details such as start date and end date, the time off request is sent to the Workday system.

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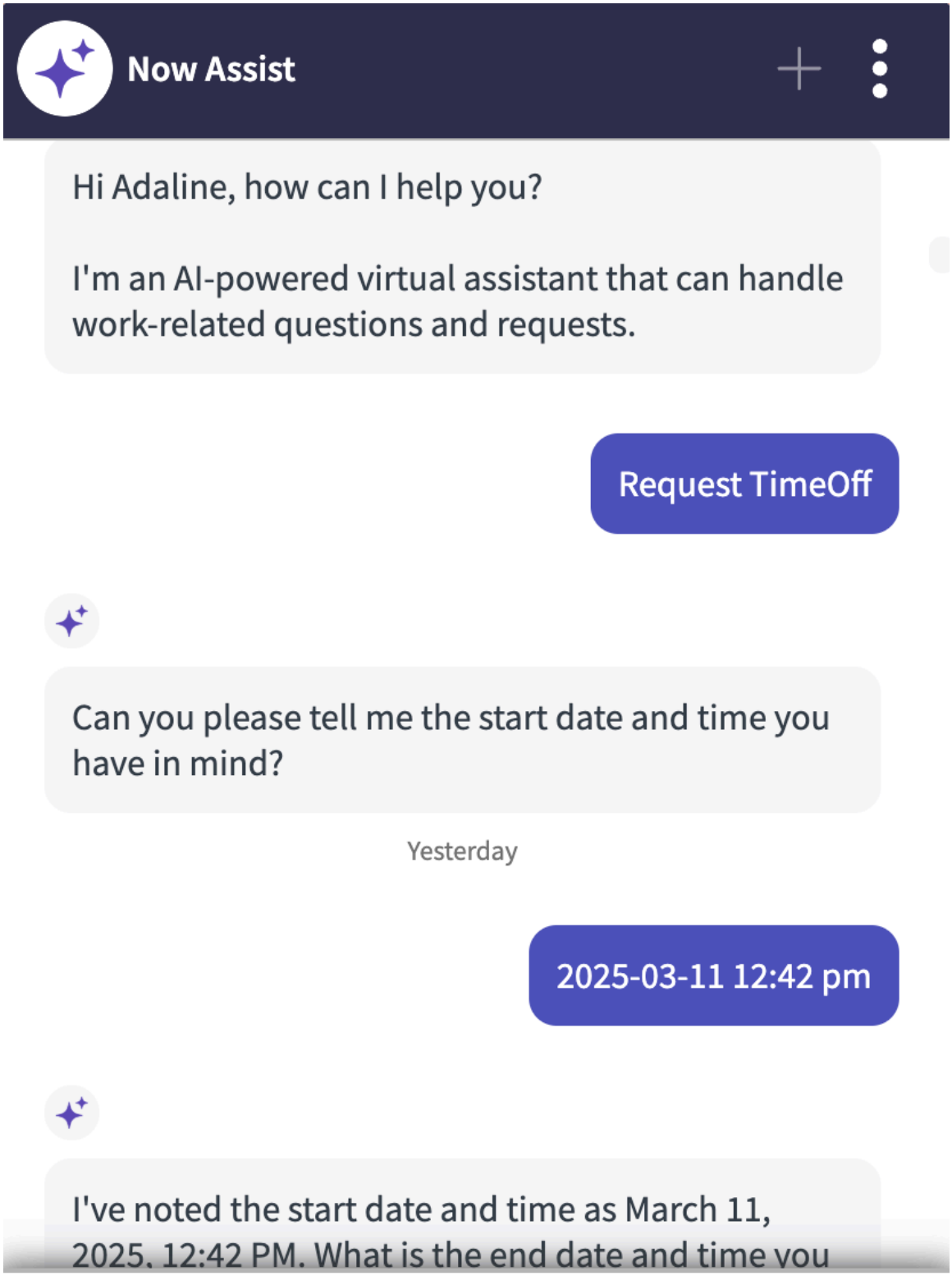

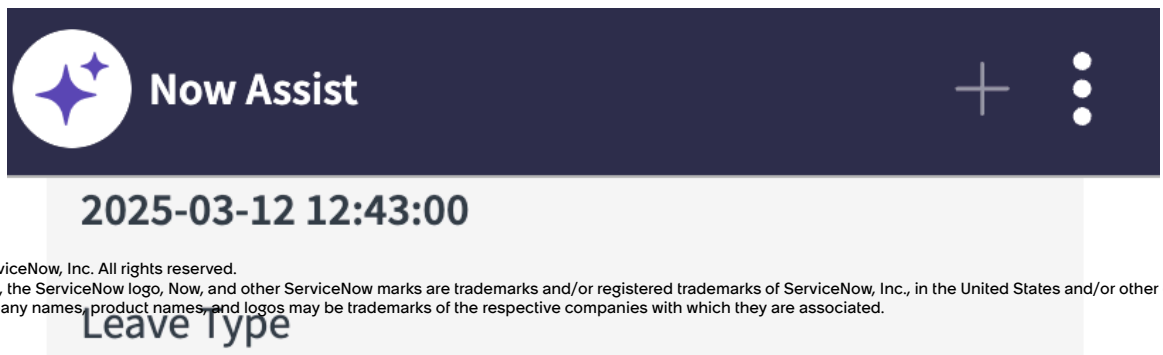

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Get Holiday Calendar

The Get Holiday Calendar Virtual Agent topic enables you to view your holiday calendar. From Employee Center, open a chat window and type in key words, for example, holiday calendar. After specifying the calendar year, the holiday calendar appears in the chat.

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Hi Adaline, how can I help you?

I'm an AI-powered virtual assistant that can handle work-related questions and requests.

just now

Get Holiday Calendar

Which year's holiday calendar would you like to see?

2025

We've collected the following information from you:

Click here to start a new conversation



Fetching your holiday calendar with a joyful tone!

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Use HCM AI agents for HR Service Delivery Advanced Integration with Workday

Place requests to the Workday system using the HR Service Delivery AI agent collection.

HCM AI agents Overview

You can submit requests to the Workday system, for example, apply for time off or update your details, using the HR Service Delivery AI agent collection in Employee Center. To access and use the HCM AI agents, ensure to Configure HCM AI agents for HR Service Delivery Advanced Integration with Workday. For more information on subflow-agent mapping, see Subflow-agent mapping for HR Service Delivery Advanced Integration with Workday.

Worker profile retriever AI agent

The Worker profile retriever AI agent enables you to find details about a colleague. The details could include the department, job, email, or phone number, based on your request.

Employee holiday calendar retrieval AI agent

The Employee holiday calendar retrieval AI agent retrieves holiday information for the specified year.

Time off requester AI agent

The Time off requester AI agent enables you to request time off or retrieve your time off balance.

Employee total rewards information AI agent

The Employee total rewards information AI agent enables you to retrieve your total rewards details.

Employee details updater AI agent

The Employee details updater AI agent enables you to update personal information such as email address, phone number, home address, blood type, and date of birth.

View paychecks AI agent

The View paychecks AI agent enables you to view paycheck summaries for the selected period.

Reference

Reference topics provide additional information about the HR Service Delivery Advanced Integration with Workday, including lists and forms.

Components installed with HR Service Delivery Advanced Integration with Workday

Several types of components are installed with activation of the HR Service Delivery Advanced Integration with Workday, including tables, user roles, and scheduled jobs.

Demo data is available for this feature.

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Roles installed

Roles installed with HR Service Delivery Advanced Integration with Workday

Role title [name]	Description	Contains roles
Advanced Workday Admin [sn_hr_workday_adv.admin]	• Can configure Workday reports. • Can customize Total rewards templates. • Can configure Legal name change settings. • Can import time offs from Workday. • Can pull holiday calendars and schedule calendars from Workday. • Can pull Workday reference IDs.	• flow_operator • import_admin

Tables installed

Tables installed with HR Service Delivery Advanced Integration with Workday

Table	Description
Time Offs [sn_hr_workday_time_offs]	Stores details of time offs, such as time off ID, and references to time off plan, and time off type.
Time Off Plans [sn_hr_workday_time_off_plans]	Stores details of time off plans, such as time off plan ID, unit of time, and daily quantity.
Time Off Types [sn_hr_workday_time_off_types]	Stores details of time offs types, such as time off type ID.
Time Off Reasons [sn_hr_workday_time_off_reasons]	Stores details on time off reasons such as time off reason ID and reference to time off.
Absence Table [sn_hr_workday_absence_table]	Stores the Absence table ID and Reason required fields.
Absence Table Tiers [sn_hr_workday_absence_table_tiers]	Stores the combination of leave plans and time offs. For example, combination of time off plan (USA Sick Plan (GPS) and time off USA Sick Time Off GPS).
Absence Table Reasons [sn_hr_workday_absence_table_reasons]	Stores reasons of the Absence table.
Holiday Calendar [sn_hr_workday_holiday_calendar]	Stores details of holiday calendars (such as holiday calendar name, start date, and end date) that are pulled from Workday.

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Tables installed with HR Service Delivery Advanced Integration with Workday (continued)

Table	Description
Work Schedule Calendar [sn_hr_workday_work_schedule_calendar]	Stores details of work schedule calendars (such as work schedule calendar name, ID, and pattern start date) that are pulled from Workday.
Legal Name Change Configuration [n_hr_workday_adv_legal_name_change_configuration]	Stores the configuration options that are set for legal name change.
Workday Reference ID List [sn_hr_workday_adv_reference_id_list]	Stores the legal name change document categories and total rewards (plans) that are pulled from Workday.
Workday Report Configuration [sn_hr_workday_adv_report_configuration]	Stores details of reports that are created in Workday. For example, name of the report, owner of the report, and purpose of creating the report.
Total Rewards Section Setup [sn_hr_workday_adv_total_rewards_section_setup]	Stores details of Total Rewards sections with plans associated to it.
Total Rewards Template Setup [sn_hr_workday_adv_total_rewards_template_setup]	Store details of Total Rewards templates with sections and plans associated to it.

Subflow-agent mapping for HR Service Delivery Advanced Integration with Workday

View the subflow-agent mapping for HR Service Delivery Advanced Integration with Workday.

Spoke subflow-agent mapping

AI agent	Feature Name	Service Name	Subflow
Worker profile retriever AI agent	Worker Management	Get Worker	Workday HR - Look up Worker Profile
Time off requester AI agent	Leave Management	Time off balance	Workday HR - Get Time off balance
		Create Time Off Request	Workday HR - Request Time Off
Employee holiday calendar retrieval AI agent		Holiday Calendar	Workday HR - Get Employee Holiday Calendar
Employee total rewards information AI agent	Benefits Management	Total Rewards	Workday HR - Get Total Rewards
Employee details updater AI agent	Human Capital Management	Update Personal Details	Workday HR - Update Personal Details

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Spoke subflow-agent mapping (continued)

AI agent	Feature Name	Service Name	Subflow
	Worker Management	Get Worker	Workday HR - Look up Worker Profile

HR Service Delivery Integration with Workday Learning

The ServiceNow® HR Service Delivery Integration with Workday Learning application is built by Bristlecone, Inc.

With this application, you can do the following:

- Synchronize worker profiles from Workday to a ServiceNow application.
- Pull Workday tasks into a ServiceNow application. Enable employees to view all their to-dos or tasks in a single place, Employee Center.

Application setup

First, you must activate the HR Service Delivery Integration with Workday Learning application from ServiceNow Store. This automatically activates the Workday Learning Spoke. Next you must set up Workday HR Spoke.

Note:

- HR Service Delivery Integration with Workday Learning depends on Workday Learning Spoke.
- For the application to work with the ServiceNow Standard Ticket page, you must install these update sets.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Get started

Use	Configure	Reference
Using HR Service Delivery Integration with Workday.	Plan and configure your implementation.	Get details about components like fields, tables, and properties.

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Configure HR Service Delivery Integration with Workday Learning

Pull Workday learning tasks or to-dos on regular scheduled basis or on manual basis for provided date range into ServiceNow instance. This allows the employees to view all their to-dos in a single place, Employee Center.

Application setup

- Activate the HR Service Delivery Integration with Workday Learning application from ServiceNow Store. This automatically activates the Workday HR Spoke.
- Set up Workday Learning Spoke.
- Activate the HR Service Delivery Integrations Framework from ServiceNow Store. HR Service Delivery Integration with Workday Learning uses Enterprise Service Management Integrations Framework to pull tasks from Workday Learning into ServiceNow. For more information on HR Service Delivery Integrations Framework, see Enterprise Service Management Integrations Framework.

Schedule flow activation

Activate and run the Trigger Workday Learning Integration that pulls tasks into ServiceNow. For more information, see Activate schedule flows.

Activate schedule flows

Activate the schedule flow that interacts with Workday Learning to pull user profile information and tasks into a ServiceNow application.

Before you begin

Role required: sn_lrn_workday.admin

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Select the **Flows** option.
3. Select **Run Workday Integration Flow** in the available flows.
4. Select **Activate**.
5. In the **Trigger** field, specify the time and interval at which you want to automatically run the scheduled flow.
   This flow in turn triggers the subflows to automate tasks. To customize the sample flow, copy it to the required application scope.

   Available subflows include:

Activate scheduled flow details

Subflow	Description
Assign Course to Workday Learning	Assigns learning courses to the ServiceNow users.
Pull Courses from Workday Learning	Retrieves details of the learning courses and maps courses from Workday Learning to ServiceNow.

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Subflow	Description
Pull User Activity from Workday Learning	Retrieves user course activity data from Workday Learning and saves it in the ServiceNow instance.
Track Approval for Workday Learning	Retrieves details of learning todos from Workday Learning and saves it in the ServiceNow instance.
Workday Learning User Mapping	Maps users between Workday Learning and ServiceNow instance

Once data is pulled into staging tables, transform maps move data into target tables. For more details, refer to Use transform maps.

Synchronize workday learning users

Pull user profile data from Workday Learning into ServiceNow. View user profile details from Workday in ServiceNow HR Service Delivery.

Before you begin

Role required: sn_lrn_workday.admin

Procedure

1. Open **Run Trigger Workday Learning Integration**.
2. Navigate to **Flow Designer** > **Designer**.
3. Click **Activate**.
   This flow in turn triggers the subflows to automate tasks. To customize the sample flow, copy it to the required application scope.

Using HR Service Delivery Integration with Workday Learning

Understand how you can use HR Service Delivery Integration with Workday Learning to process employee information at ServiceNow.

View user activity for Workday Learning

All user activity data is shipped along with HR Service Delivery Integration with Workday Learning. However, if you want to view or edit the user activity details, you can edit the respective subflow and then edit the respective record.

Before you begin

Role required: sn_lrn_workday.admin

Procedure

1. Navigate to **All** > **Workday Learning** > **Data Sources** > **Sync User Activity**.
2. Select **Sync User Activity for Workday Learning**.
3. On the form, edit the fields.

   For a description of the field values, see Edit a record in HR Service Delivery Integration with Workday Learning.

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View track approval for Workday Learning

Track every pull that has been performed from ServiceNow to Workday Learning. View or edit details of the job, such as when did the job begin and end, when did the records start loading into staging tables, or did the job run completely or fail in between.

Before you begin

Role required: sn_lrn_workday.admin

Procedure

1. Navigate to **All** > **Workday Learning** > **Data Sources** > **Track Approval**.
2. Select **Track Approval for Workday Learning**.
3. On the form, edit the fields.

   For a description of the field values, see Edit a record in HR Service Delivery Integration with Workday Learning.

Use transform maps

Transform maps specify data relationships between source table and target table.

For details on the transform maps, navigate to **System Import Sets** > **Administration** > **Transform Maps**.

Transformation Maps

Name	Description
Workday Learning User Mapping	Maps users profiles from the user Profile Staging [sn_lrn_workday_user_mapping_staging] table to the User Profile [sn_lc_user_mapping] table.
Workday Learning Courses	Maps workday learning courses from Staging [sn_lrn_workday_course_staging] table to the Learning External Content [sn_lc_external_content] table.
Workday Learning Offering Lessons	Maps the Workday Learning Offering Lessons from the Staging [sn_lrn_workday_offering_lessons_staging]
Workday Learning User Course Activity	Maps user course activity from the Staging [sn_lrn_workday_user_course_activity_staging] table to the Learning User Course Activity [sn_lc_user_course_activity] table.
Workday Learning Todos	Maps to-dos from the Workday Learning Todos Staging [sn_lrn_workday_todos_staging] table to the Workday Learning Todos [sn_lrn_workday_todos] table.
Workday Learning User Course Self Enrollment	Maps user self enrollment information from the Staging [sn_lrn_workday_user_course_self_enrollment_staging] to the Learning User Course Activity [sn_lc_user_course_activity] table.
Workday Learning Course Offering	Maps learning course offerings from the Staging [sn_lrn_workday_course_offering_staging] to the Collection [sn_lc_collection] table.
Workday Learning Collection Courses	Maps the Workday Learning Collection from the Staging [sn_lrn_workday_collection_staging] to the Collection [sn_lc_collection] table.

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Transformation Maps (continued)

Name	Description
Workday Learning Program Courses	Maps learning program courses from the Staging [sn_lrn_workday_program_courses] to the Collection Course Item [sn_lc_m2m_collection_course_item] table.

Import set tables in HR Service Delivery Integration with Workday Learning

Import set tables into HR Service Delivery Integration with Workday Learning

HR Service Delivery Integration with Workday Learning todos staging

Import workday learning todos.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workday Learning** > **System import sets** > **Import set tables** > **Workday learning todos**.
2. Select **New**.
3. On the form, edit the fields.

   For a description of the field values, see HR Service Delivery Integration with Workday Learning todos staging.
4. Select **Submit**.

HR Service Delivery Integration with Workday Learning user course activity staging

Import workday learning user course activity staging information.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workday Learning** > **System import sets** > **Import set tables** > **Workday learning user course activity staging**.
2. Select **New**.
3. On the form, edit the fields.

   For a description of the field values, see Workday learning user course activity staging form.
4. Select **Submit**.

Reference HR Service Delivery Integration with Workday Learning

Reference topics provide additional information about the HR Service Delivery Integration with Workday Learning, including lists and forms.

Components installed with workday learning

Several types of components are installed with activation of the HR Service Delivery Integration with Workday Learning (sn_lrn_workday) application, including tables and user roles.

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Roles installed

Workday learning role installation details

Role title [name]	Description	Contains roles
HR Workday Learning Admin [sn_lrn_workday.admin]	• Can access all features and capabilities of the HR Service Delivery Integration with Workday Learning application. • Can configure worker profile settings.	[sn_lrn_workday.admin]

Scheduled flows installed

Workday learning scheduled flow install details

Scheduled flow	Description
Trigger Workday Learning Integration Flow	Pulls data from Workday Learning to ServiceNow. By default the flow is in inactive state. For information on how to activate the flow, see Activating schedule flows.

Tables installed

Workday learning table install details

Table	Description
Workday Learning Configurations [sn_lrn_workday_configurations]	Stores parameters or inputs which help in setting up the todos configuration.
Workday Learning Todos [sn_lrn_workday_todos]	Stores todos that are pulled from Workday Learning.
Worker Profile Sync Configuration [sn_lrn_workday_worker_profile_sync_configuration]	Stores one-time configuration parameters for the initial setup of the HR Service Delivery Integration with Workday Learning application.
Workday Learning Skills	Fetches all the active skills from Workday Learning.

Edit a record in HR Service Delivery Integration with Workday Learning

Use this form to create a new record in HR Service Delivery Integration with Workday Learning for multiple scenarios like Sync User Activity, Self Enrollment Activity, and Track Approval.

Data source record

Field	Description
Name	Name of the activity.

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Data source record (continued)

Field	Description
Import set table label	Label used for the import set table.
Import set table name	Name of the import set table.
Type	Defines the type of item being uploaded. If it is a file, JDBC, LDAP, OIDC, Rest, Data stream, or custom
Format	The format of the file being uploaded. Formats supported are CSV, custom (by script), excel, JSON or XML.
Application	The application the data is being uploaded to.
File retrieval method	The method in which the date uploaded must be retrieved.
CSV delimiter	Labels assigned to delimit the data being uploaded.

Workday learning todos staging form

Use this form to create Workday learning todos.

Workday Learning Todos Staging form

Field	Description
Domain	Name of the domain.
Description	Brief description of the todo activity.
Old assignee	Person who the todo was assigned to previously.
Completed by admin	Activities completed by the admin.
Integration user ID	Unique identification number of the integration user.
URL	URL of the todo.
Due date	Date by which the todo is due.
Last functionally updated	Date on which the todo was last updated.
Previous state	State of the todo prior to the current state.
Completed by	Date on which the todo is completed.
Created moment	Time at which the todo was created.
Integration todo ID	Unique identification number of the todo.
State	State of the todo.

Workday learning user course activity staging form

Use this form to create Workday learning todos.

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Workday Learning User Course Activity Staging form

Field	Description
Domain	Name of the domain.
Worker	Brief description of the todo activity.
Employee ID	Person who the todo was assigned to previously.
Assigned_By	Activities completed by the admin.
Assigned_by_WID	Unique identification number of the integration user.
Assigned_Date	URL of the todo.
Assignment Mechanism	Date by which the todo is due.
Assignment_Cancellation_Date	Date on which the todo was last updated.
Assignment_Status	State of the todo prior to the current state.
Created moment	Date on which the todo is completed.
Assigment_Record_Completion_Moment	Time at which the todo was created.
Due_date	Unique identification number of the todo.
Last_Functionally_Updated	State of the todo.
Learning content	Associated learning content.

HR Service Delivery integration with Oracle Cloud HCM

The ServiceNow® HR Service Delivery integration with Oracle Cloud HCM application is built by Bristlecone, Inc. This integration enables you to pull data for departments, locations, positions, workers, and assignments from the Oracle HCM Cloud into the ServiceNow® platform.

Application setup

First, you must activate the HR Service Delivery integration with Oracle Cloud HCM [sn_hr_oracle_hcm] application, from the ServiceNow Store. This automatically activates the Oracle HCM Cloud spoke [sn_oracle_hcm_spoke] and the Enterprise Service Management Integrations Framework [sn_hr_integr_fw].

For next steps, see Configuring HR Service Delivery integration with Oracle Cloud HCM.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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Get started

Configure	Use	Reference
		
Plan and configure your integration.	Work on integrating ServiceNow with Oracle HCM Cloud.	Get details about components like fields, tables, and properties.

Configuring HR Service Delivery integration with Oracle Cloud HCM

Set up Oracle HCM for HR Service Delivery to pull worker data from Oracle HCM into a ServiceNow instance. View worker profiles from Oracle HCM Cloud in ServiceNow HR Service Delivery.

Before you begin

- Role required: None
- Activate HR Service Delivery integration with Oracle Cloud HCM that automatically activates Enterprise Service Management Integrations Framework and Oracle HCM Cloud spoke.

> **Note:** If you are upgrading from HR Service Delivery integration with Oracle Cloud HCM V 1.0.1 to a later version, follow the instructions in this KB article.

Procedure

1. Install update sets.
   For more information, see update sets in supporting links in ServiceNow store.
2. Allow RCAs manually in the Utah release.

   This step is not required if you have already upgraded to Enterprise Service Management Integrations Framework 3.3.8 version.

   Allow the Restricted Caller Access records with Status = **Requested** and Source Scope = **Enterprise Service Management Integrations Framework**.
3. For better performance, index the employee number field in HR Profile table and index coalesce fields in transform maps.
   For more information, see create a table index.
4. Set up Oracle HCM spoke.
   For more information, see set up Oracle HCM Cloud spoke.
5. **Optional:** Configure integration source properties for HR Service Delivery integration with Oracle Cloud HCM
   For more information, see Configure properties.
6. Activate and run the scheduled flow that synchronizes Worker profile information between Oracle HCM and ServiceNow HR Service Delivery periodically.
   For more information, see Activate schedule flows.

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Configure properties

Once you set up HR Service Delivery integration with Oracle Cloud HCM, the source record for the Oracle HCM Cloud application is automatically created in the Enterprise Service Management Integrations Framework, Source module. The integrations source properties can be used to configure the HR Service Delivery integration with Oracle Cloud HCM.

These properties are available for HR Service Delivery integration with Oracle Cloud HCM.

To set the properties, navigate to **Integrations Framework** > **Source** > **Oracle HCM Cloud**.

Properties for HR Service Delivery integration with Oracle Cloud HCM

Property	Description
workers_records_per_page	Number of worker records that are pulled per page from the Oracle HCM Cloud system. Default value: 100
locations_records_per_page	Number of records that are pulled per page for locations from the Oracle HCM Cloud system. Default value: 100
departments_records_per_page	Number of records that are pulled per page for departments from the Oracle HCM Cloud system. Default value: 100
position_records_per_page	Number of records that are pulled per page for positions from the Oracle HCM Cloud system. Default value: 100
workers_query	List of query fields. For example, PersonId, PersonNumber, DateOfBirth, ApplicantNumber DisplayName, FullName, and ListName The property can be left blank, or a relevant query can be provided in the format specified in Oracle HCM. **Note:** workers_query is an optional property.
full_pull	When set to **True**, all the records are pulled from the Oracle HCM system into respective tables in ServiceNow instance. When set to **False**, only modified records (based on last successful schedule run time) are pulled from the Oracle HCM system into respective tables in ServiceNow instance. Default value: False

Activate schedule flows

Activate a schedule flow that interacts with Oracle HCM to pull worker profile information into a ServiceNow instance. This flow automatically pulls all new changes in the Oracle HCM and keeps the worker profiles updated in the HR Service Delivery.

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Before you begin
Role required: sn_hr_oracle_hcm.admin

Procedure

1. Navigate to **Process Automation** > **Flow Designer**.
2. Select **Trigger Oracle HCM Integration**.
3. In the Trigger section, set the time and interval at which you want to automatically run the scheduled flow.
4. Click **Done**.
5. Click **Activate**.

Using HR Service Delivery integration with Oracle Cloud HCM

Understand how to use the integration feature to get the data from Oracle cloud HCM into ServiceNow.

Mapping entity profile fields

The Trigger Oracle HCM Integration flow maps the entity profile fields from Oracle HCM to the HR profile fields in the ServiceNow® platform.

Important: For details about the fields that are mapped, refer to this KB article.

Run a scheduled job

Manually run the schedule job to pull data from Oracle HCM to the ServiceNow platform.

Before you begin
Role required: admin

Procedure

1. Navigate to **Integrations framework** > **Sources**.
2. Open the Oracle HCM record.
3. Click **Run job**.

Reference - HR Service Delivery integration with Oracle Cloud HCM

Reference topics provide additional information about the HR Service Delivery integration with Oracle Cloud HCM, including lists and forms.

Components installed with HR Service Delivery integration with Oracle Cloud HCM

Several types of components are installed with the activation of the HR Service Delivery integration with Oracle Cloud HCM (sn_hr_oracle_hcm) application, including tables, user roles, and scheduled jobs.

Roles installed

Roles installed with HR Service Delivery integration with Oracle Cloud HCM

Role title [name]	Description	Contains roles
HR Oracle HCM Cloud Admin [sn_hr_oracle_hcm.admin]	Can access all the features and capabilities of the Enterprise Service	Can access all features and capabilities of the Enterprise Integrations

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Roles installed with HR Service Delivery integration with Oracle Cloud HCM (continued)

Role title [name]	Description	Contains roles
	Management Integrations Framework with the HR Service Delivery integration with Oracle Cloud HCM application.	with Oracle HCM integration application. Contains the sn_hr_integr_fw.admin role.

Scheduled job installed

Scheduled jobs installed with HR Service Delivery integration with Oracle Cloud HCM

Scheduled flow	Description
Trigger Oracle HCM Integration flow	Pull data from Oracle HCM Cloud to a ServiceNow® instance. By default, the flow is in inactive state. For information on how to activate the flow, see Activate schedule flows.

Tables installed

The tables required for HR Service Delivery integration with Oracle Cloud HCM are obtained from the Enterprise Service Management Integrations Framework. The tables get auto-installed with the Enterprise Service Management Integrations Framework installation when you activate the HR Service Delivery integration with Oracle Cloud HCM application. For more information, see Components installed with Enterprise Service Management Integrations Framework.

Transform maps for HR Service Delivery integration with Oracle Cloud HCM

Transform maps specify data relationships between a source table and a target table.

HR Profile Transform Map, Job Transform Map, Department Transform Map, Location Transform Map, Position Transform Map are the transform maps used in HR Service Delivery integration with Oracle Cloud HCM. For more information, see Create transform maps in Enterprise Service Management Integrations Framework.

Note: Ensure that you index coalesce fields for better transformation performance.

HR Service Delivery Advanced Integration with Oracle HCM

The ServiceNow® HR Service Delivery Advanced Integration with Oracle HCM is built by Bristlecone, Inc.

It enables you to complete the following Oracle HCM tasks from a ServiceNow instance without navigating into the Oracle HCM system.

- From a ServiceNow instance, submit a query related to your direct deposit account that is in the Oracle HCM system.
- From a ServiceNow instance, submit a query related to your time off balance in the Oracle HCM system.

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- View your holiday calendars from the Oracle HCM system in the configured portal in a ServiceNow instance.
- View your total rewards information from the Oracle HCM system in the configured portal in a ServiceNow instance.

Note: These use cases don't work if your Employee ID, Person ID, and Location details aren't present in your HR profile.

Application setup

First, you must activate HR Service Delivery Advanced Integration with Oracle HCM application from the ServiceNow Store. The Oracle HCM Cloud spoke [sn_oracle_hcm_spoke], Human Resources Scoped App: Core [com.sn_hr_core] and HR Service Delivery Portal UI Components [com.sn_hr_portal_components] applications are automatically installed.

Next, you must set up Oracle HCM Cloud spoke.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Components installed with HR Service Delivery Advanced Integration with Oracle HCM

Several types of components are installed with activation of the HR Service Delivery Advanced Integration with Oracle HCM [sn_hr_oracle_adv] plugin, including tables and user roles.

Demo data is available for this feature.

Roles installed

Roles and descriptions

Role title [name]	Description	Contains roles
HR Oracle Advanced Admin [sn_hr_oracle_adv.admin]	• Can complete the set up to display total rewards information from an Oracle HCM system into a ServiceNow instance. • Can complete the set up to pull holiday calendars from an Oracle HCM system into a ServiceNow instance.	None

Tables installed

Tables and descriptions

Table	Description
Holiday Calendar [sn_hr_oracle_adv_holiday_calendar]	Stores holiday calendars that are pulled from a Oracle HCM system into a ServiceNow instance.

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Configure total rewards in HR Service Delivery Advanced Integration with Oracle HCM

Complete the set up to display Oracle total rewards to employees in the configured portal in the ServiceNow instance.

Before you begin
Role required: sn_hr_oracle_adv.admin

Procedure

1. Create the total rewards BI report in the Oracle HCM system.
   For more details, refer to this KB article.
2. Add the BI report path in the Oracle HCM system.
   This is required for the Get Total Rewards Action to pull Oracle HCM total rewards information into the ServiceNow instance. For more information, see set up Oracle HCM Cloud spoke.
3. Click **Submit**.

What to do next
An employee can add the View Oracle Total Rewards widget to any ServiceNow page. An employee will not be able to view this widget if the Person ID (Correlation_ID) is missing in the HR profile [sn_hr_core_profile] table.

Configure holiday calendars in HR Service Delivery Advanced Integration with Oracle HCM

Pull holiday calendars from the Oracle HCM system into a ServiceNow application. Display applicable holiday calendars to employees in the configured Service Portal.

Before you begin
Role required: sn_hr_oracle_adv.admin

Procedure

1. Create the Holiday Calendar BI report in the Oracle HCM system.
   For more details, refer to this KB article.
2. To run the View Holiday Calendar widget successfully, configure BI report and Connection & Credential Aliases in Oracle Cloud HCM Spoke.
   For more information, see set up Oracle HCM Cloud spoke.
3. Navigate to **Oracle Advanced Use Cases** > **Holiday Calendar**.
4. Click **Get Holiday Calendars**.
   All the records starting from current year until the next available calendar years are pulled from Oracle HCM system and stored in the Holiday Calendar [sn_hr_oracle_adv_holiday_calendar] table.

What to do next
An employee can add the View Holiday Calendar widget to any ServiceNow page. An employee will not be able to view this widget if the Person ID (Correlation_ID) is missing in the HR profile [sn_hr_core_profile] table.

Configure Virtual Agent topics for HR Service Delivery Advanced Integration with Oracle HCM

Complete the configuration steps to enable your employees place requests to the Oracle system using the Now Assist for HRSD Virtual Agent topics in Employee Center.

Before you begin
Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

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Procedure

1. Install the HR Service Delivery Advanced Integration with Oracle HCM, Now Assist for HRSD, and Enterprise Service Management Integrations Framework (v3.6) applications from ServiceNow Store.
2. Configure the Oracle HCM Cloud Spoke to pull data from Oracle system.
3. Create subflows aligning with Template Integration Gateway.
   See Create a subflow using Template Integration Gateway.

   Note: You can use the default subflows that have been created for Oracle.

4. Configure Integration Provider Mapping (Decision table) by adding input choices and configuring conditions on input choices and results.
5. Create a Virtual Agent topic block:

   Note: The Virtual Agent topics are available by default with the Now Assist for HRSD scope.

   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. From the **LLM Assistant** list, select **Now Assist in Virtual Agent**.
   c. Select a Virtual Agent topic.
      i. Edit topic properties, make the necessary edits in the topic, such as update the node name, and response message.
      ii. In Integration Gateway, specify the appropriate feature, service name, user, and make the necessary edits.

Configure HCM AI agents for HR Service Delivery Advanced Integration with Oracle HCM

Configure HCM AI agents to enable your employees to place requests to the Oracle system using the HR Service Delivery AI agent collection.

Before you begin

View Subflow-agent mapping for HR Service Delivery Advanced Integration with Oracle HCM.

Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

Procedure

1. Install the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).
   For more information, see Configure Now Assist for HR Service Delivery (HRSD).
2. Activate the [Enterprise Service Management Integrations Framework] application from the ServiceNow® Store.
3. Configure the Oracle HCM Cloud Spoke to pull data from Oracle system.
4. Create subflows aligning with Template Integration Gateway.
   For more information, see Create a subflow using Template Integration Gateway.

   Note: You can use also the default subflows that have been created for Oracle.

5. Add input choices and define conditions and results in a decision table for the Integration Gateway subflow.
   For more information, see Configure Integration Provider Mapping (Decision table).

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6. Duplicate AI agents available for Oracle to run them autonomously.
   For more information, see Duplicate an AI agent.

Note: In the Toggle display section, ensure the toggle beside Virtual Agent is enabled.

Submit a time off balance query in HR Service Delivery Advanced Integration with Oracle HCM

Submit a query related to your time off balance in the Oracle HCM system from a ServiceNow instance.

Before you begin

Role required: none

The View Time Off Widget works on the basis of Person ID (Correlation_ID) field in the HR profile [sn_hr_core_profile] table. You will not be able to see your time off balances if your Person ID (Correlation_ID) is missing in your HR profile.

Procedure

1. Navigate to **Employee Center** > **Catalog** > **Benefits** > **Time off balances**.
2. View details of all your time off balances.
3. In the **Do you have any question regarding your time off balance?** field, type in your query.
4. Click **Submit**.
   An HR case is created under the HR Service, View Time Off – Oracle Cloud HCM.

Submit a direct deposit query in HR Service Delivery Advanced Integration with Oracle HCM

Submit a query related to your direct deposits in the Oracle HCM system from a ServiceNow instance.

Before you begin

Role required: none

You will not be able to see your direct deposit accounts and its details if your employee number and Person ID (Correlation_ID) are missing in your HR profile.

Procedure

1. Navigate to **Employee Center** > **Catalog** > **Payroll** > **Direct Deposit Inquiry**.
2. View details of all your direct deposit accounts.
3. Select an account for which you want to submit the query.
4. In **How can we help you with your current direct deposits?** field, type in your query.
5. Click **Submit**.
   An HR case is created under the HR service, Direct Deposit Inquiry - Oracle HCM Cloud.

Report a payslip issue in Oracle HCM

Report an issue in your Oracle HCM payslip from Employee Center.

Before you begin

- Role required: none
- You might not be able to report a payslip discrepancy if your HR profile does not have a valid Correlation ID or Person ID, and Employment Start Date.

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Procedure

1. Open Employee Center.
2. Navigate to **Catalog** > **Payroll** > **Payroll Discrepancy - Oracle HCM Cloud**.
3. In the **Payroll year** field, select the year in which the payslip was generated.
4. In the **Payroll month** field, select the month in which the payslip was generated.
5. In the **Payment date** field, select the date on which the payslip was generated.
6. In the **Legal Employer** field, select the legal employer from which the payslip was generated.

   Note: This field appears only when you have payslips generated from multiple employers.

7. In the **How can we help you with this payslip** field, specify the discrepancy that is found in the payslip.
8. Click **Submit**.
   An HR case gets created under the Payroll cases category.

HR Service Delivery Portal UI Components

The ServiceNow® HR Service Delivery Portal UI Components application contains common widgets, such as Direct Deposits, Holiday Calendar, Time Off Balances, and Total Rewards widgets that be used with any HR application.

Application set up

You must have the HRSD Enterprise and Professional license to install the HR Service Delivery Portal UI Components application from ServiceNow Store.

Add widgets to an HR application

Add the HR Portal Components, such as Direct Deposits, Holiday Calendar, Time Off Balances, and Total Rewards widgets that can be used with any HR application.

Before you begin

Role required: admin

Procedure

1. Navigate to **Service Portal** > **Widgets**.
2. Embed the HR Portal Components widget in the main widget of your application by passing the source.
   A source refers to the system of data for these widgets, for example, Oracle or Workday. The HR Service Delivery Portal UI Components application uses scripted extension points to provide an implementation to fetch data based on the source that is passed through outer widgets. For more information on how to embed widgets, see Embedded widgets.

Now Assist Virtual Agent topics for HR Service Delivery Advanced Integration with Oracle HCM

You can use the Now Assist Virtual Agent topics in Employee Center to place requests, for example, apply for a time off or update your details from the Oracle HCM system in Employee Center.

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Virtual Agent topics for HR Service Delivery Advanced Integration with Oracle HCM Overview

To access and use the Virtual Agent topics, verify the following:

- Configure the Now Assist for HRSD Virtual Agent topics
- Role required: sn_hr_oracle_adv.admin

Available Spoke Subflows for Virtual Agent topics for HR Service Delivery Advanced Integration with Oracle HCM

Spoke subflow-topic mapping

Virtual Agent Topic	Feature Name	Service Name	Subflow
Lookup Worker Profile	Worker Management	Get Worker	Oracle HCM - Retrieve Worker Profile
Request Time Off	Leave Management	Time off balance	Oracle HCM - Get Time off balance
		Create Time Off Request	Oracle HCM - Request Time Off
Get Time Off Balance		Time Off Balance	Oracle HCM - Get Time Off Balance
Get Holiday Calendar		Holiday Calendar	Oracle HCM - Get Employee Holiday Calendar
Get Total Rewards	Benefits Management	Total Rewards	Oracle HCM - Get Total Rewards
Lookup Benefits Enrollments		Get Benefits	Oracle HCM - Lookup Benefits Enrollments
Get User Pay Checks	Payroll Management	Get Paychecks	Oracle HCM - Get Employee Paychecks
Lookup Feedback	Feedback Management	Get Feedback	Oracle HCM - Lookup Feedback
• Update Email Address • Update Address • Update Phone Number • Update Date of Birth • Update Blood Type	Human Capital Management	Update Personal Details	Oracle HCM - Update Personal Details
	Worker Management	Get Worker	Oracle HCM - Retrieve Worker Profile

Lookup Worker Profile

The Lookup Worker Profile Virtual Agent topic enables you to view the profile of a coworker. From Employee Center, open a chat window and type in key words, for example, worker profile.

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After you have specified the details of coworkers, worker profile details of one or more users are displayed.

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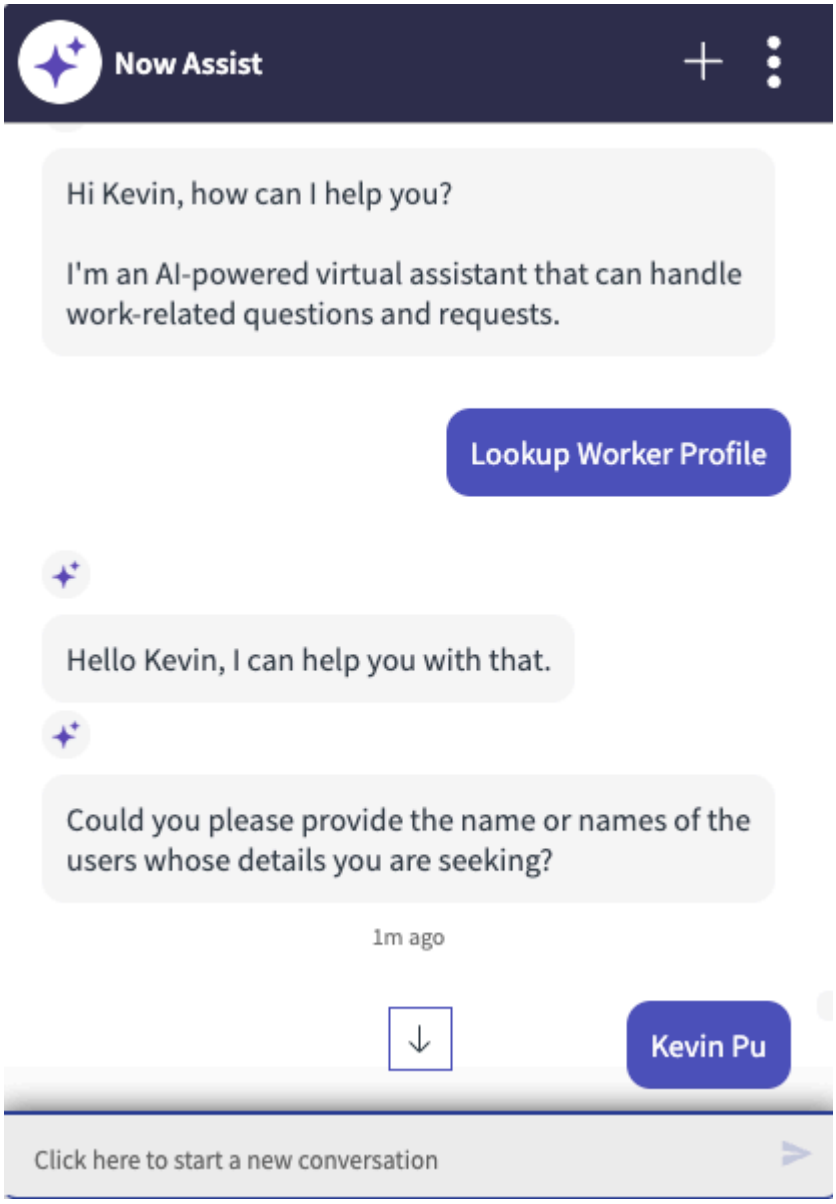

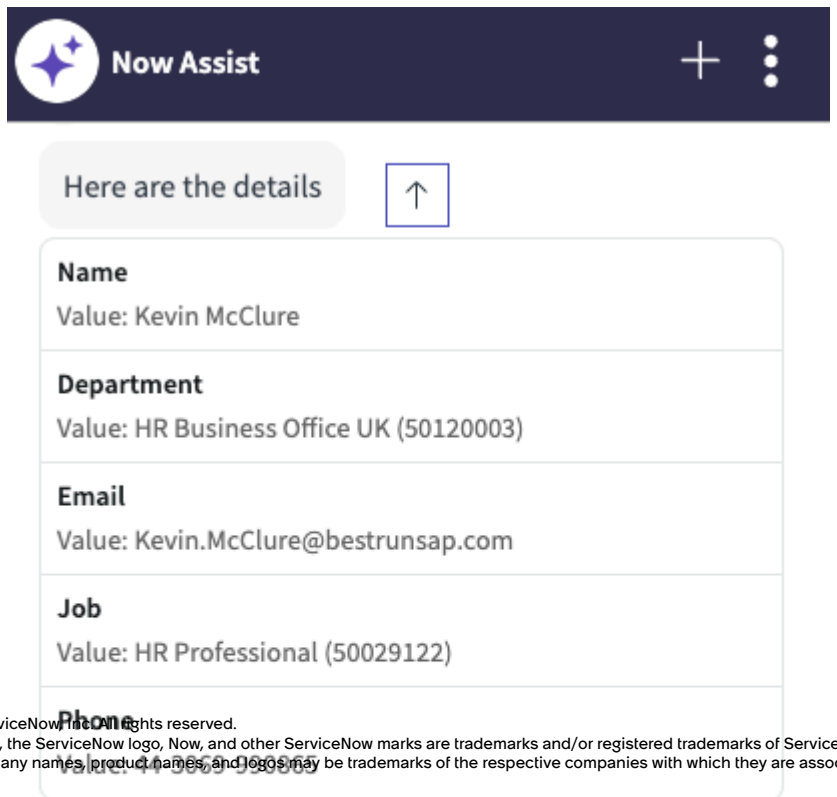

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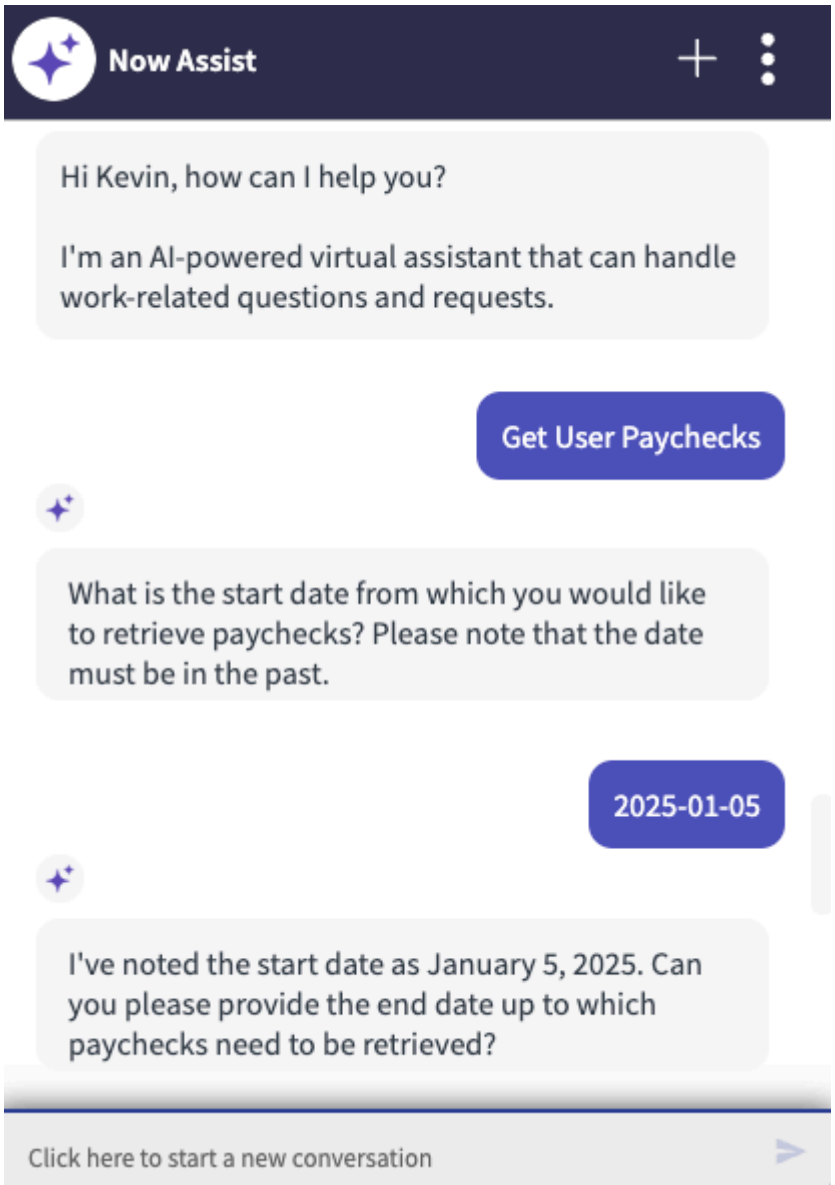
Update Personal Details

You can update personal details in Virtual Agent using one of the following topics in Employee Center from the Oracle HCM system.

- Update Address
- Update Date of Birth
- Update Email Address
- Update Phone Number

Get User Paychecks

The Get User Paychecks Virtual Agent topic enables you to view your payslip details. From Employee Center, open a chat window and type in key words, for example, get payslips. After you provide the required details such as start date and end date, your payslip summary, in the form of pay period, gross pay, deductions, and net pay are displayed. A detailed breakdown of deductions is also displayed.



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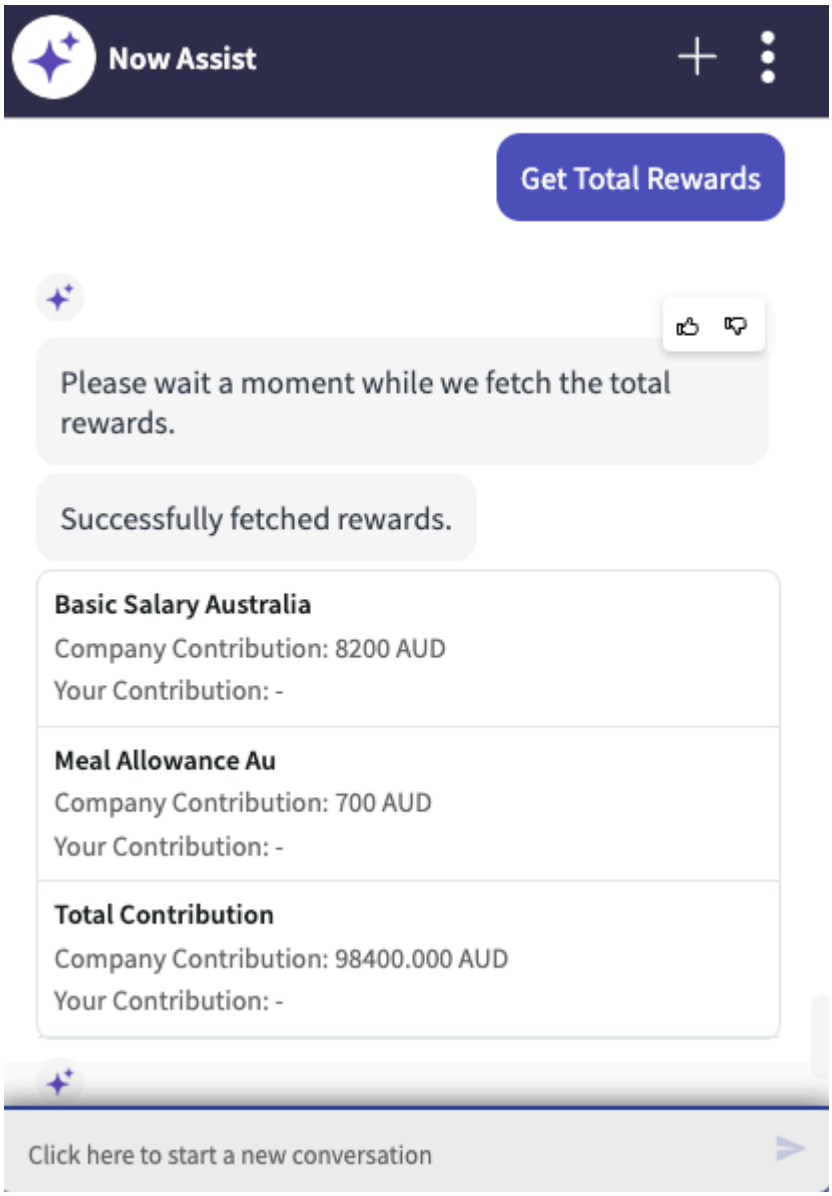
Get Total Rewards

The Get Total Rewards Virtual Agent topic enables you to view your rewards. From Employee Center, open a chat window and type in key words, for example, rewards.



Get Time Off Balance

The Get Time Off Balance Virtual Agent topic enables you to view your leave balance. From Employee Center, open a chat window and type in key words, for example, leave balance.

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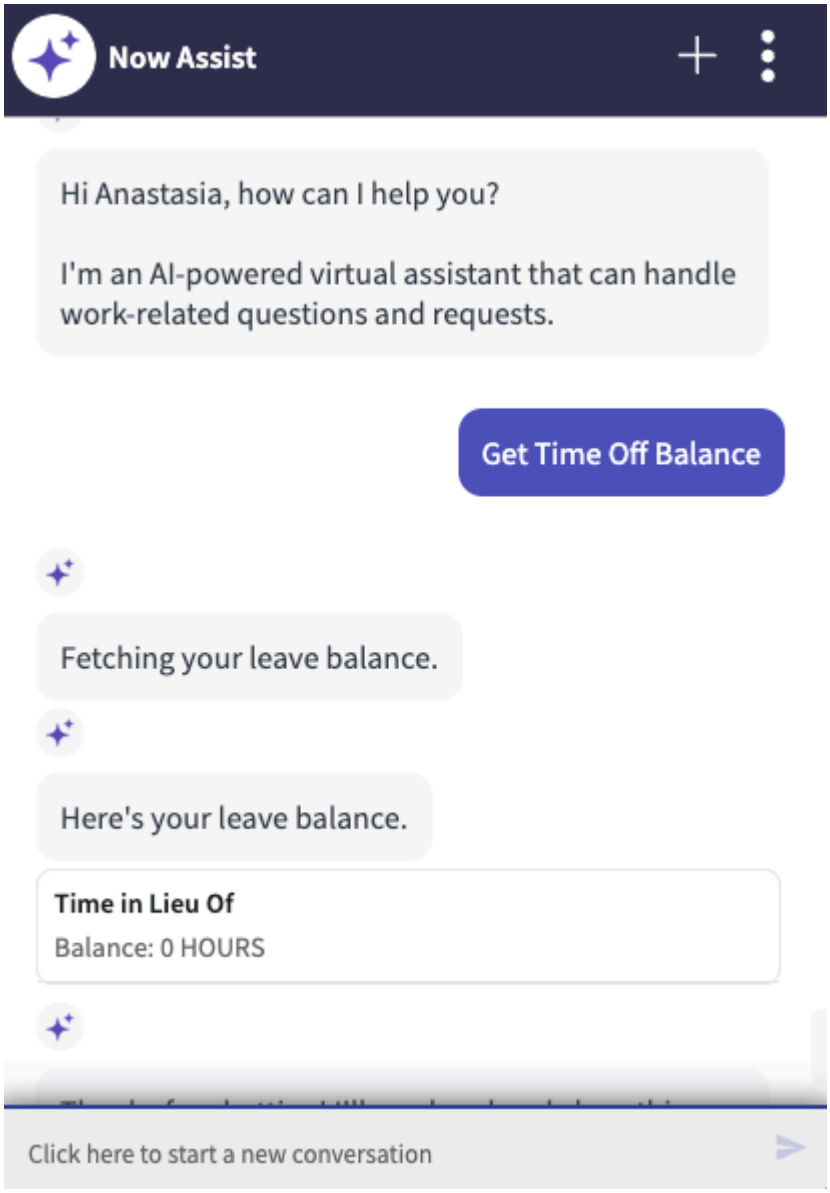

Request Time Off

The Request Timeoff Virtual Agent topic enables you to apply for leaves. From Employee Center, open a chat window and type in key words, for example, request time off. After you have specified required details such as start date and end date, the time off request is sent to the Oracle HCM system.

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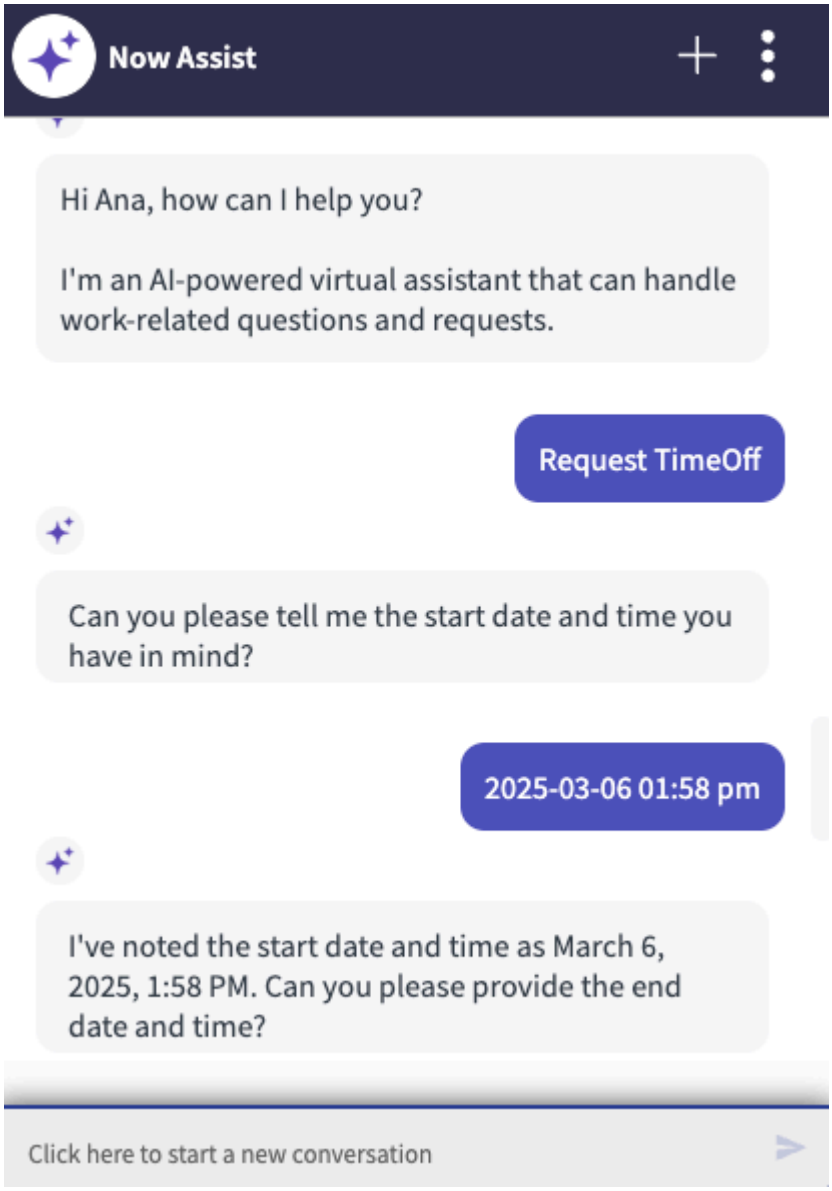

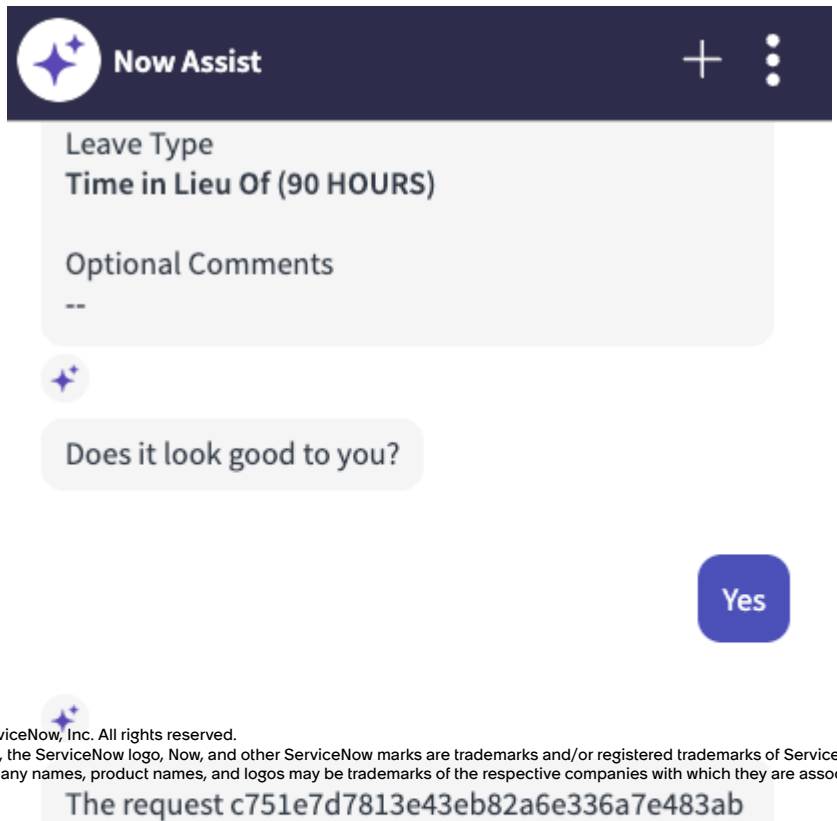

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Get Holiday Calendar

The Get Holiday Calendar Virtual Agent topic enables you to view your holiday calendar. From Employee Center, open a chat window and type in key words, for example, holiday calendar. After specifying the calendar year, the holiday calendar appears in the chat.

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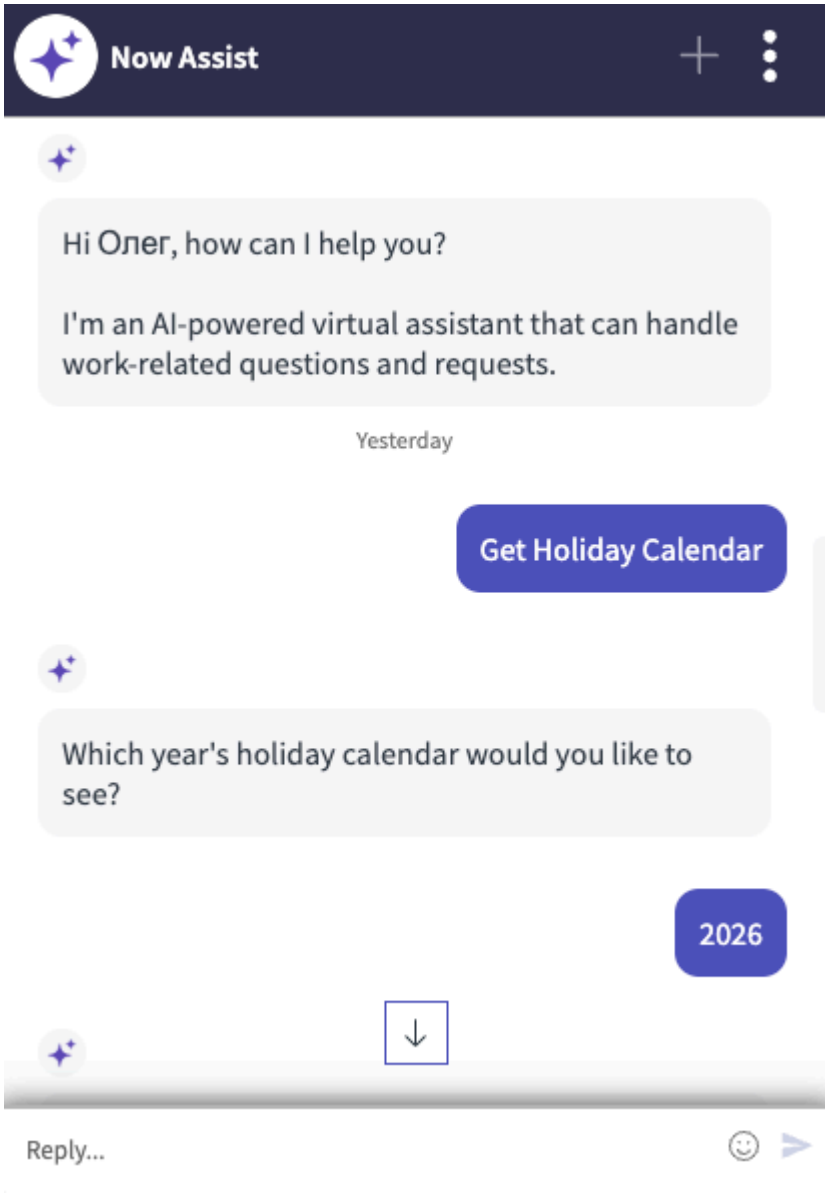

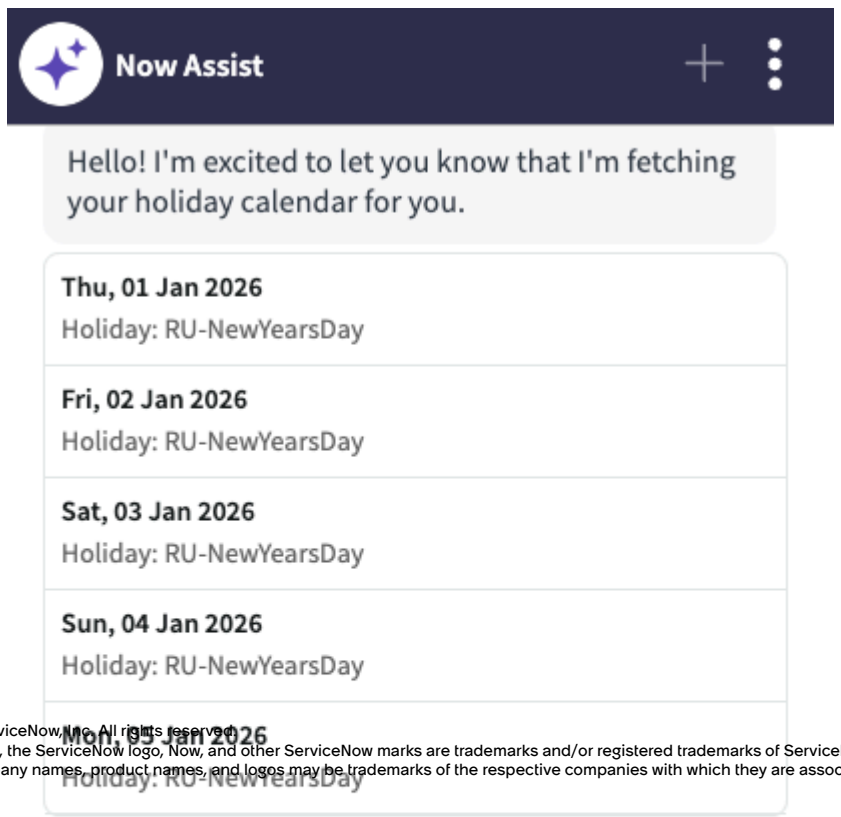

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Lookup Benefit Enrolments

The Lookup Benefit Enrolments Virtual Agent topic enables you to view your benefit programs such as medical, 401(k) and so on, in Employee Center from the Oracle HCM system. From Employee Center, open a chat window and type in key words, for example, Lookup Benefit Enrolments. Your benefit programs, if available, are displayed.

Lookup Feedback

The Lookup Feedback Virtual Agent topic enables you to view feedback you have received from other employees in Employee Center from the Oracle system. From Employee Center, open a chat window and type in key words, for example, Lookup Feedback. Your feedback, if available, is displayed.

Use HCM AI agents for HR Service Delivery Advanced Integration with Oracle HCM

Place requests to the Oracle system using the HR Service Delivery AI agent collection.

HCM AI agents Overview

You can submit requests to the Oracle system, for example, apply for time off or update your details, using the HR Service Delivery AI agent collection in Employee Center. To access and use the HCM AI agents, ensure to Configure HCM AI agents for HR Service Delivery Advanced Integration with Oracle HCM. For more information on subflow-agent mapping, see Subflow-agent mapping for HR Service Delivery Advanced Integration with Oracle HCM.

Worker profile retriever AI agent

The Worker profile retriever AI agent enables you to find details about a colleague. The details could include the department, job, email, or phone number, based on your request.

Employee holiday calendar retrieval AI agent

The Employee holiday calendar retrieval AI agent retrieves holiday information for the specified year.

Time off requester AI agent

The Time off requester AI agent enables you to request time off or retrieve your time off balance.

Employee total rewards information AI agent

The Employee total rewards information AI agent enables you to retrieve your total rewards details.

Benefits enrollment retriever AI agent

The Benefits enrollment retriever AI agent enables you to view the benefits information you're enrolled in.

Employee details updater AI agent

The Employee details updater AI agent enables you to update personal information such as email address, phone number, home address, blood type, and date of birth.

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HCM feedback retriever AI agent

The HCM feedback retriever AI agent enables you to view feedback you have received in the HCM system.

View paychecks AI agent

The View paychecks AI agent enables you to view paycheck summaries for the selected period.

Subflow-agent mapping for HR Service Delivery Advanced Integration with Oracle HCM

View the subflow-agent mapping for HR Service Delivery Advanced Integration with Oracle HCM.

Spoke subflow-agent mapping

AI agent	Feature Name	Service Name	Subflow
Worker profile retriever AI agent	Worker Management	Get Worker	Oracle HCM - Retrieve Worker Profile
Time off requester AI agent	Leave Management	Time off balance	Oracle HCM - Get Time off balance
		Create Time Off Request	Oracle HCM - Request Time Off
Employee holiday calendar retrieval AI agent		Holiday Calendar	Oracle HCM - Get User Holiday Calendar
Employee total rewards information AI agent	Benefits Management	Total Rewards	Oracle HCM - Get Total Rewards
Benefits enrollment retriever AI agent		Get Benefits	Oracle HCM - Look up Benefits Enrollments
Employee details updater AI agent	Human Capital Management	Update Personal Details	Oracle HCM - Update Personal Details
	Worker Management	Get Worker	Oracle HCM - Retrieve Worker Profile
HCM feedback retriever AI agent	Feedback Management	Get Feedback	Oracle HCM - Look up Feedback

HR Service Delivery Integration with SuccessFactors

The ServiceNow® HR Service Delivery Integration with SuccessFactors application is built by Bristlecone, Inc.

Using HR Service Delivery Integration with SuccessFactors you can enable employees to fulfill related tasks at a single location in ServiceNow and also synchronize the employee records.

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Get started

Configure	Use	Reference
		
Plan and configure your integration.	Work on integrating ServiceNow HR Service Delivery with SuccessFactors.	Get details about components like tables, user roles, and properties.

Configuring HR Service Delivery Integration with SuccessFactors

After you install the HR Service Delivery Integration with SuccessFactors, the services for SuccessFactors are automatically created in Enterprise Service Management Integrations Framework.

Before you begin

- Role required: sn_hr_sf.admin
- Activate HR Service Delivery Integration with SuccessFactors that automatically activates Enterprise Service Management Integrations Framework and SuccessFactors spoke.

Procedure

1. Allow RCAs manually.
   Allow the Restricted Caller Access records with Status = **Requested** and Source Scope = **Enterprise Service Management Integrations Framework** or **HR Service Delivery Integration with Successfactors**.
2. For better performance, index the employee number field in the HR Profile table and index coalesce fields in Use transform maps.
   For more information, see create a table index.
3. Set up SuccessFactors spoke.

   Note: To use HR Service Delivery Integration with SuccessFactors, ensure to set up the SuccessFactors spoke version 3.1.2

   For more information, see set up SuccessFactors Spoke.
4. **Optional:** Configure integration source properties for Source for HR Service Delivery Integration with SuccessFactors.
5. Activate and run the scheduled flow that synchronizes Worker profile information between SuccessFactors and ServiceNow HR Service Delivery periodically.
   For more information, see Activating schedule flows.

Activating schedule flows

Activate the schedule flow that interacts with SuccessFactors to pull worker profile information and tasks into a ServiceNow application.

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Before you begin
Role required: sn_hr_sf.admin

Procedure

1. Navigate to **Flow Designer** > **Designer**.
2. Open **Run Trigger SAP SuccessFactors Integrations**.
3. In the **Trigger** field, specify the time and interval at which you want to automatically run the scheduled flow.
4. Click **Activate**.
5. Expand **Call Run SuccessFactors Service Subflow**.

   Once data is pulled into staging tables, transform maps moves data into target tables. For more details, refer to Use transform maps.

Note:

- For a partial pull, deselect the **Retrieve all data** check box. Partial pull is not supported for Department and Location. It is only supported for HR profile and Job Profile.
- The **Retrieve All Data** check box is not supported for Pull To-Dos. The first pull will always be a full pull based on the configuration parameter **Initial Load Date time**. The subsequent ones are incremental pulls.
- Before you run the flow, turn off reporting: **com.snc.process_flow.reporting.level**.

Configure pull todos

Store one-time configuration parameters to pull tasks from HR Service Delivery Integration with SuccessFactors into the ServiceNow application.

Before you begin
Role required: sn_hr_sf.admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **Source**.
2. Select **SAP SuccessFactors**.
3. On the Integration Services, set **Pull Todos**to true.

Configure push todos

Store one-time configuration parameters to pull tasks from HR Service Delivery Integration with SuccessFactors into the ServiceNow application.

Before you begin
Role required: sn_hr_sf.admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **Source**.
2. Select **SAP SuccessFactors**.
3. On the Integration Services, set **Push Todos** to true.

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Enable push todos flow

Enable push todos flow to push existing todos to HR Service Delivery Integration with SuccessFactors.

Before you begin

Role required: sn_hr_sf.admin

Procedure

1. Navigate to **All** > **Flow Designer**.
2. Open **Push Todos**.
3. In the **Trigger** field, specify the time and interval at which you want to automatically run the scheduled flow.
4. Click **Activate**.

Configure Virtual Agent topics for HR Service Delivery Integration with SuccessFactors

Complete the configuration steps to enable your employees place requests to the SuccessFactors system using the Now Assist for HRSD Virtual Agent topics in Employee Center.

Before you begin

Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

Procedure

1. Install the HR Service Delivery Integration with SuccessFactors, Now Assist for HRSD, and Enterprise Service Management Integrations Framework (v3.6) applications from ServiceNow Store.
2. Configure the SuccessFactors Spoke to pull data from SuccessFactors system.
3. Create subflows aligning with Template Integration Gateway.
   See Create a subflow using Template Integration Gateway.

   Note: You can use the default subflows that have been created for SuccessFactors.

4. Configure Integration Provider Mapping (Decision table) by adding input choices and configuring conditions on input choices and results.
5. Create a Virtual Agent topic block:

   Note: The Virtual Agent topics are available by default with the Now Assist for HRSD scope.

   a. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
   b. From the **LLM Assistant** list, select **Now Assist in Virtual Agent**.
   c. Select a Virtual Agent topic.
      i. Edit topic properties, make the necessary edits in the topic, such as update the node name, and response message.
      ii. In Integration Gateway, specify the appropriate feature, service name, user, and make the necessary edits.

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Configure AI agents for HR Service Delivery Integration with SuccessFactors

Configure HCM AI agents to enable your employees to place requests to the SuccessFactors system using the HR Service Delivery AI agent collection.

Before you begin

View Subflow-agent mapping for HR Service Delivery Integration with SuccessFactors.

Role required: flow_designer, decision_table_admin, sn_hr_integr_fw.admin, and sn_hr_core.admin

Procedure

1. Install the Now Assist for HR Service Delivery (HRSD) plugin (sn_hr_gen_ai).
   For more information, see Configure Now Assist for HR Service Delivery (HRSD).
2. Activate the Enterprise Service Management Integrations Framework] application from the ServiceNow® Store.
3. Configure the SuccessFactors Spoke to pull data from SuccessFactors system.
4. Create subflows aligning with Template Integration Gateway.
   For more information, see Create a subflow using Template Integration Gateway.

   Note: You can also use the default subflows that have been created for SuccessFactors.

5. Add input choices and define conditions and results in a decision table for the Integration Gateway subflow.
   For more information, see Configure Integration Provider Mapping (Decision table).
6. Duplicate AI agents available for SuccessFactors to run them autonomously.
   For more information, see Duplicate an AI agent.

   Note: In the Toggle display section, ensure the toggle beside Virtual Agent is enabled.

Configure HR Service Delivery Integration with SuccessFactors properties

System properties control system behavior. The integrations source properties can be used to configure the HR Service Delivery Integration with SuccessFactors. You can access system properties for HR Service Delivery Integration with SuccessFactors by navigating to All > HRSD SuccessFactors Integration > System Properties. These system properties are only applicable for HR Service Delivery Integration with SuccessFactors and cannot be leveraged with SuccessFactors spoke.

HRSD SuccessFactors System Properties

Field	Description
sn_hr_sf.Retrieve Departments Service (Retrieve Departments Service subflow)	Makes retrieve departments service subflow customer configurable.
sn_hr_sf.Retrieve Effective Workers Service	Makes retrieve effective workers subflow customer configurable.
sn_hr_sf.Retrieve Job Profiles Service	Makes retrieve job profiles subflow customer configurable.
sn_hr_sf.Retrieve Jobs Service	Makes retrieve jobs service subflow customer configurable.
sn_hr_sf.Retrieve Locations Service	Makes retrieve locations service subflow customer configurable.

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HRSD SuccessFactors System Properties (continued)

Field	Description
sn_hr_sf.Retrieve Todos Service	Makes retrieve todo service subflow customer configurable.
sn_hr_sf.Retrieve Workers Service	Makes retrieve workers serice subflow customer configurable.

Note: These system properties are only applicable for HR Service Delivery Integration with SuccessFactors and cannot be leveraged with SuccessFactors spoke. Ensure that the property is set to use the OOB sub-flow exclusively. If you've introduced any new sub-flows, verify that they are compatible with HR use cases before updating the property value.

Using HR Service Delivery Integration with SuccessFactors

Understand how you can use HR Service Delivery Integration with SuccessFactors to manage data and entities on ServiceNow.

View job tracker details

Track every pull that has been performed from ServiceNow to SuccessFactors either by schedule job or manual reconciliation process. View details of the job, such as when did the job begin and end, when did the records start loading into staging tables, or did the job run completely or fail in between.

Before you begin

Role required: sn_hr_sf.admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **Job Tracker**.
2. Open **SAP SuccessFactors**.
3. View job details:

Integration Job Trackers

Field	Description
Job name	Name of the job that has run.
Job start time	Date and time when the job started.
Job end time	Date and time when the job ended.
Source	Origin of the job.
State	Current state of the job such as **Complete** or **Failed**.
Error message	Message displayed when the job fails.

4. Select a job record.
   In the Integration Service Job Trackers related list, view the service job details.

Integration Service Job Trackers

Field	Description
Name	Unique identifier for the service job run.

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Field	Description
Service type	Name of the service job that has run. For example, Worker Profiles integration service.
Flow	Flow of the job.
Import set tables	Available staging tables.
Active	Option that indicates if the state of the job tracker is active.
Application	Application containing the record.
Source	Source of the integration service
Order	Order in which the item is executed as part of sync.

View to dos

View details of the tasks that are pulled from HR Service Delivery Integration with SuccessFactors into ServiceNow application.

Before you begin

Role required: sn_hr_sf.admin

Procedure

1. Navigate to **All** > **Integrations Framework** > **Todos**
2. On the form, view the fields.

Todos

Field	Description
Active	Option indicating whether the task is active in SuccessFactors.
Integration todo ID	Unique identifier for the SuccessFactors task.
URL	Navigation to SuccessFactors to complete the task.
External status	Current status of the task in SuccessFactors. For example, awaiting Action or cancelled.
Domain	
Todo description	Description of the SuccessFactors task visible in ServiceNow Employee Service Center .
Assigned to	User to whom the task is assigned.
Todo state	Option that indicates if the state of the task is one among the following: ○ Open ○ Complete
Extension system	The origin of the task.
Due date	Date and time by which the task has to be completed.

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Use transform maps

Transform maps specify data relationships between source table and target table.

For details on the transform maps, navigate to **Integrations Framework** > **Transform maps**. For more information, see Create transform maps in Enterprise Service Management Integrations Framework

Note: Ensure that you index coalesce fields for better transformation performance.

Field mappings

The Trigger SAP SuccessFactors Integration Flow maps the entity profile fields from SuccessFactors to the HR profile fields in the ServiceNow® platform.

Important: For details about the fields that are mapped, refer to this KB article

Now Assist Virtual Agent topics for HR Service Delivery Integration with SuccessFactors

You can use the Now Assist Virtual Agent topics in Employee Center to place requests, for example, apply for a time off or update your details from the SuccessFactors system in Employee Center.

Virtual Agent topics for HR Service Delivery Integration with SuccessFactors Overview

To access and use the Virtual Agent topics, verify the following:

- Configure the Now Assist for HRSD Virtual Agent topics
- Have one of the following roles: sn_hr_sp.admin , sn_hr_sp.esc_admin

Available Spoke Subflows for Virtual Agent topics for HR Service Delivery Integration with SuccessFactors

Spoke subflow-topic mapping

Virtual Agent Topic	Feature Name	Service Name	Subflow
Lookup Worker Profile	Worker Management	Get Worker	SuccessFactors HR - Lookup Worker Profile
Request Time Off	Leave Management	Time off balance	SuccessFactors HR - Get Time off balance
		Create Time Off Request	SuccessFactors HR - Request Time Off
Get Time Off Balance		Time Off Balance	SuccessFactors HR - Get Time Off Balance
Get Holiday Calendar		Holiday Calendar	SuccessFactors HR - Get Employee Holiday Calendar
Get Total Rewards	Benefits Management	Total Rewards	SuccessFactors HR - Get Total Rewards
Get User Pay Checks	Payroll Management	Get Paychecks	SuccessFactors HR - Get Employee Paychecks

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Spoke subflow-topic mapping (continued)

Virtual Agent Topic	Feature Name	Service Name	Subflow
• Update Email Address • Update Address • Update Phone Number • Update Date of Birth • Update Blood Type	Human Capital Management	Update Personal Details	SuccessFactors HR - Update Personal Details
	Worker Management	Get Worker	SuccessFactors HR - Lookup Worker Profile

Lookup Worker Profile

The Lookup Worker Profile Virtual Agent topic enables you to view the profile of a coworker. From Employee Center, open a chat window and type in key words, for example, worker profile. After you have specified the details of coworkers, worker profile details of one or more users are displayed.

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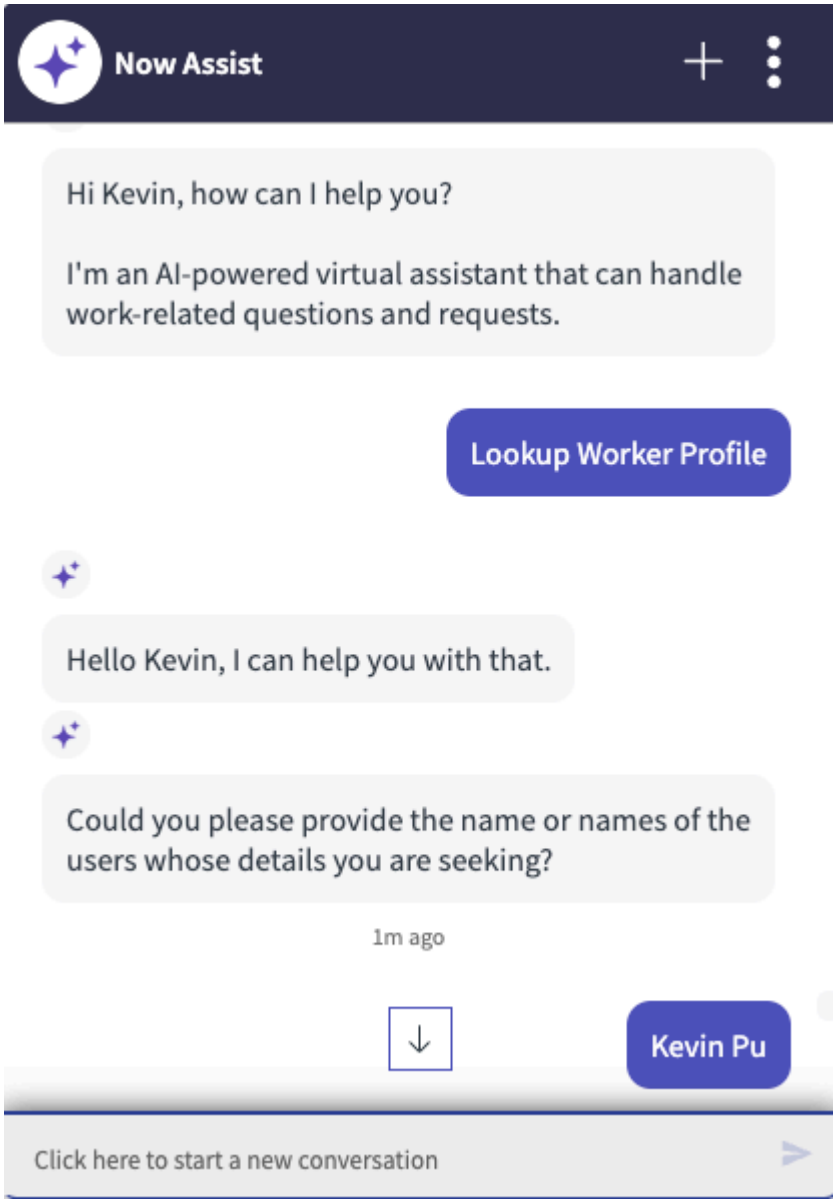

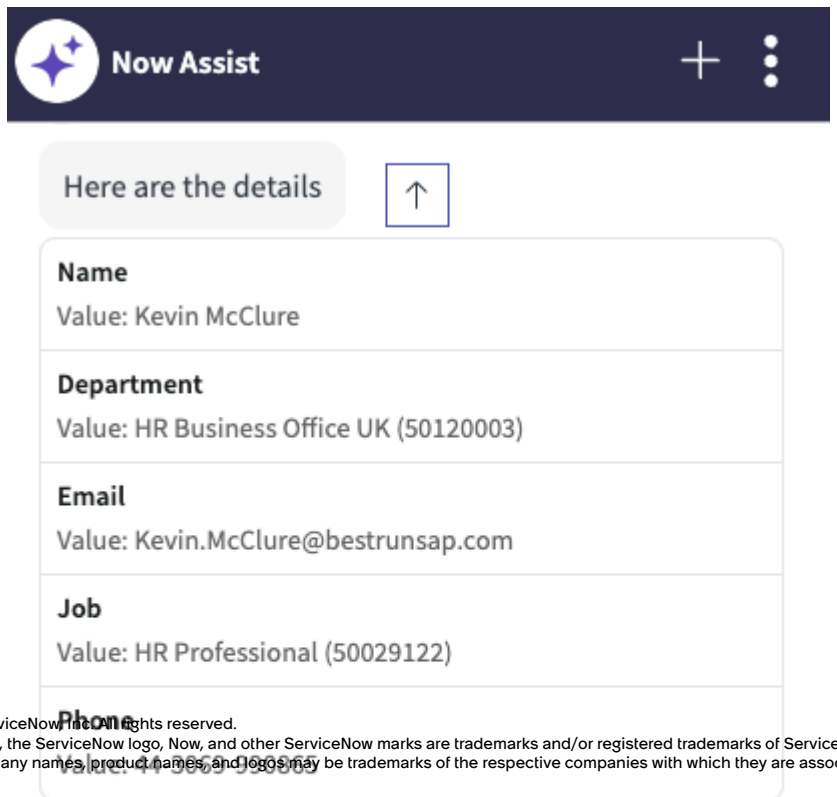

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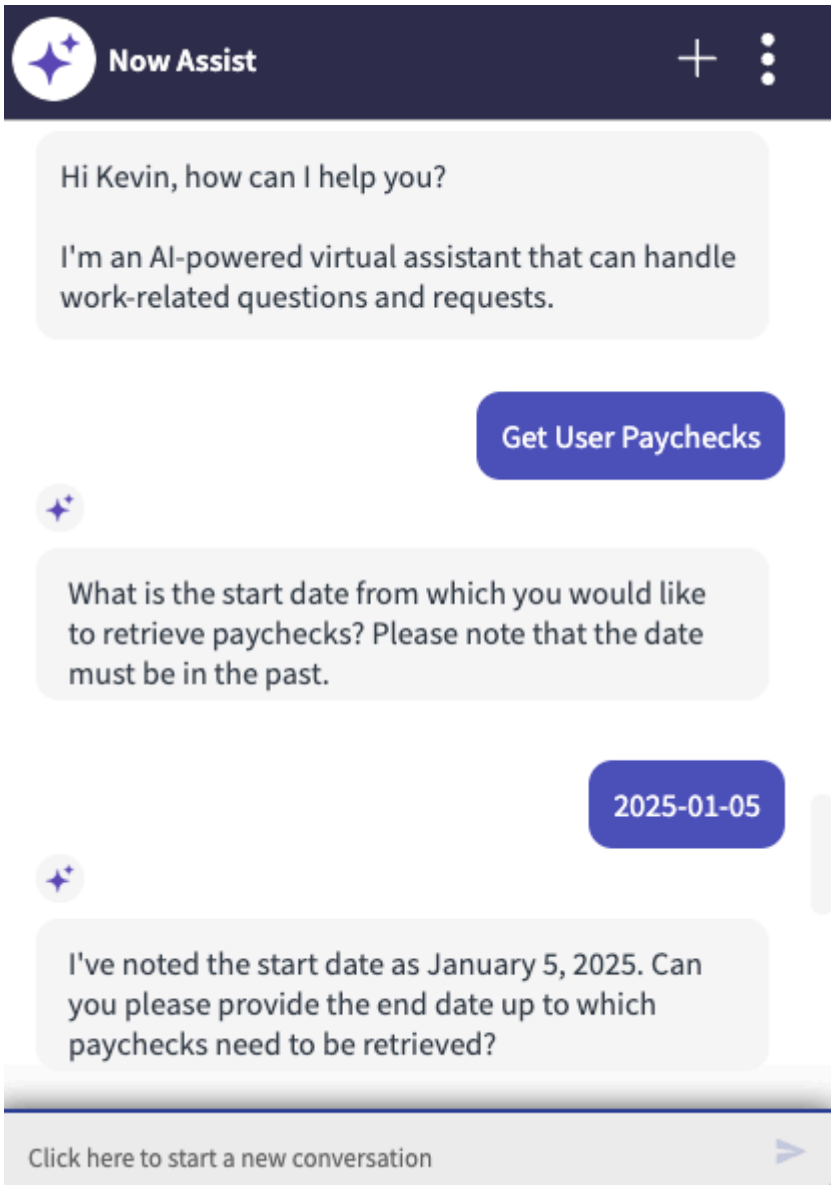
Update Personal Details

You can update personal details in Virtual Agent using one of the following topics in Employee Center from the SuccessFactors system.

- Update Address
- Update Date of Birth
- Update Email Address
- Update Phone Number

Get User Paychecks

The Get User Paychecks Virtual Agent topic enables you to view your payslip details. From Employee Center, open a chat window and type in key words, for example, get payslips. After you provide the required details such as start date and end date, your payslip summary, in the form of pay period, gross pay, deductions, and net pay are displayed. A detailed breakdown of deductions is also displayed.



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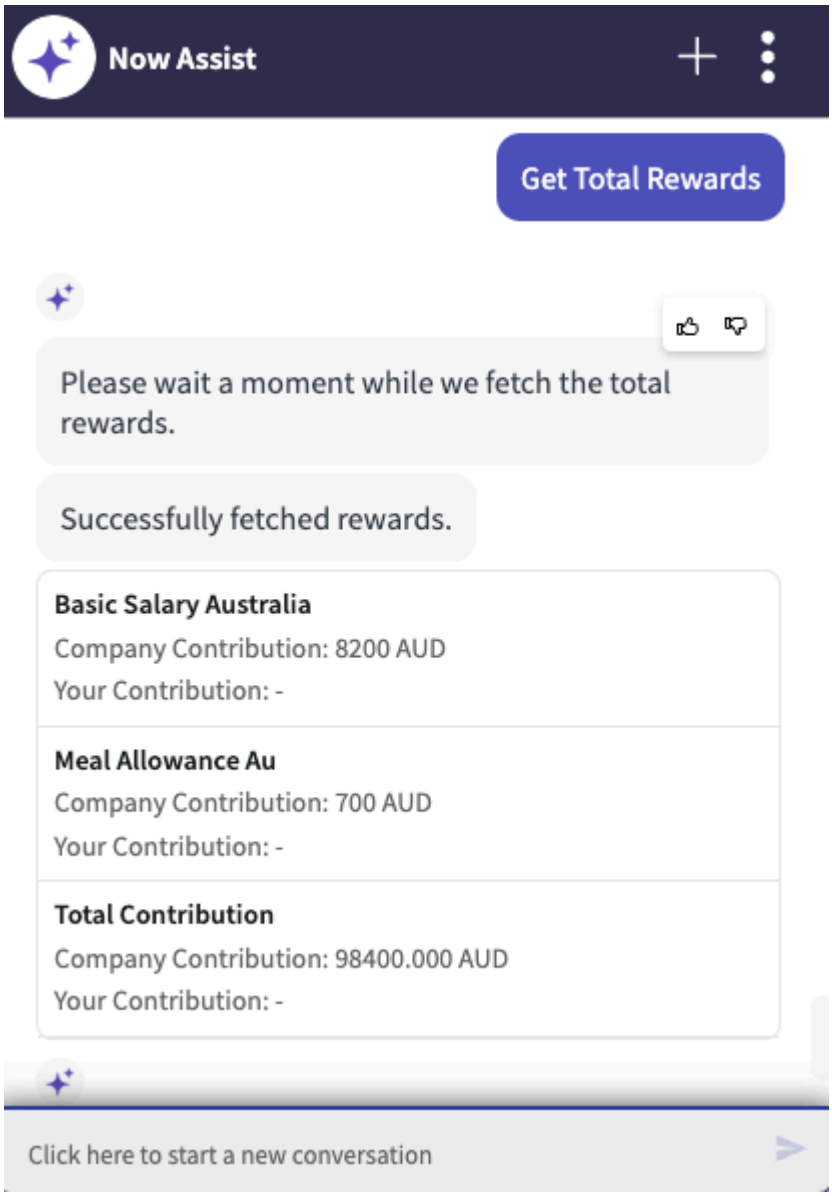
Get Total Rewards

The Get Total Rewards Virtual Agent topic enables you to view your rewards. From Employee Center, open a chat window and type in key words, for example, rewards.



Get Time Off Balance

The Get Time Off Balance Virtual Agent topic enables you to view your leave balance. From Employee Center, open a chat window and type in key words, for example, leave balance.

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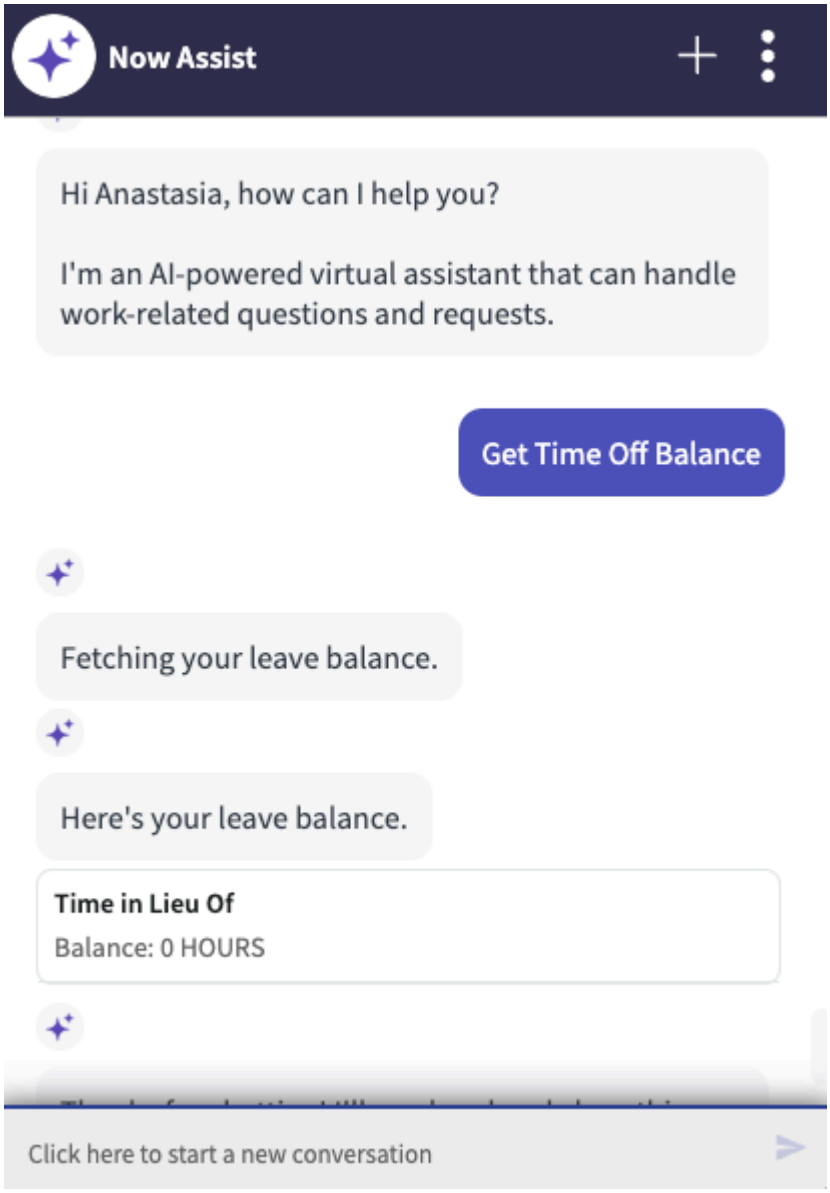

Request Time Off

The Request Timeoff Virtual Agent topic enables you to apply for leaves. From Employee Center, open a chat window and type in key words, for example, request time off. After you have specified required details such as start date and end date, the time off request is sent to the SuccessFactors system.

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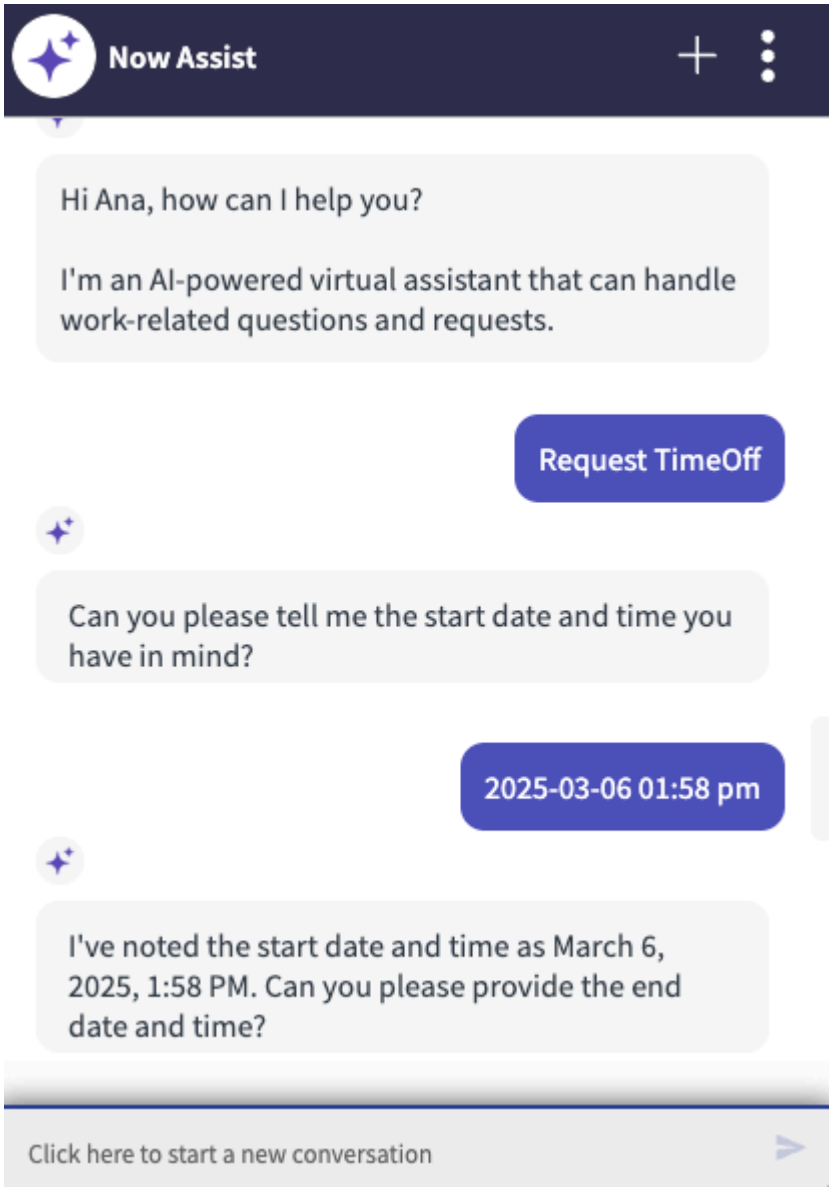

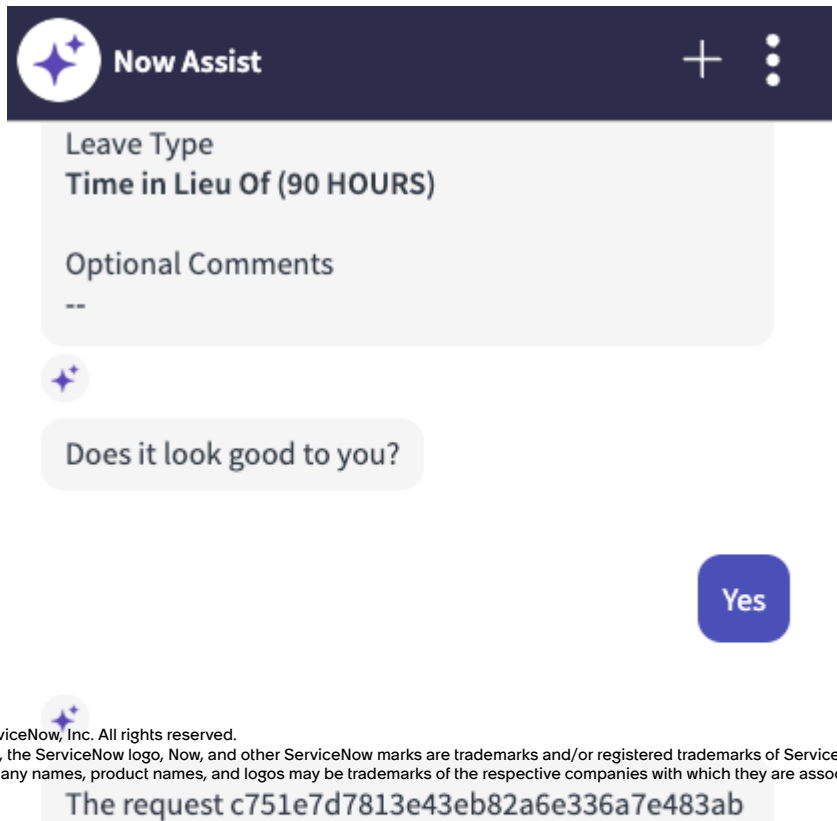

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Get Holiday Calendar

The Get Holiday Calendar Virtual Agent topic enables you to view your holiday calendar. From Employee Center, open a chat window and type in key words, for example, holiday calendar. After specifying the calendar year, the holiday calendar appears in the chat.

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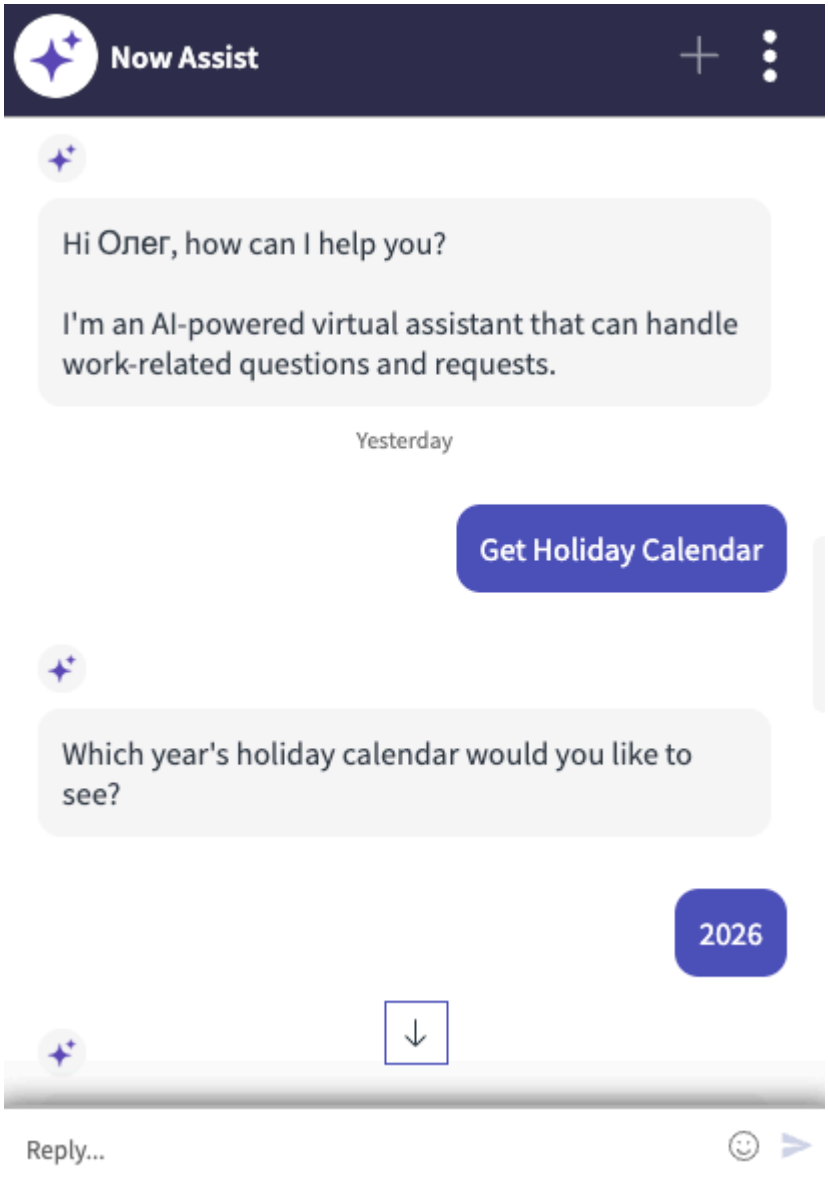

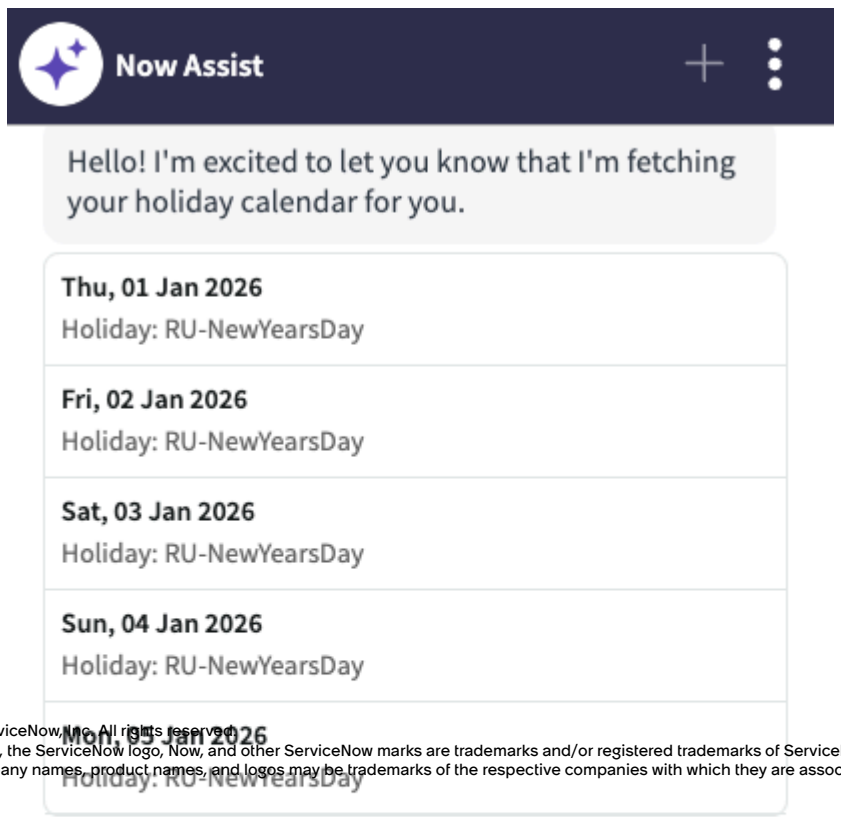

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Use HCM AI agents for HR Service Delivery Integration with SuccessFactors

Place requests to the SuccessFactors system using the HR Service Delivery AI agent collection.

HCM AI agents Overview

You can submit requests to the SuccessFactors system, for example, apply for time off or update your details, using the HR Service Delivery AI agent collection in Employee Center. To access and use the HCM AI agents, ensure to Configure AI agents for HR Service Delivery Integration with SuccessFactors. For more information on subflow-agent mapping, see Subflow-agent mapping for HR Service Delivery Integration with SuccessFactors.

Worker profile retriever AI agent

The Worker profile retriever AI agent enables you to find details about a colleague. The details could include the department, job, email, or phone number, based on your request.

Employee holiday calendar retrieval AI agent

The Employee holiday calendar retrieval AI agent retrieves holiday information for the specified year.

Time off requester AI agent

The Time off requester AI agent enables you to request time off or retrieve your time off balance.

Employee total rewards information AI agent

The Employee total rewards information AI agent enables you to retrieve your total rewards details.

Employee details updater AI agent

The Employee details updater AI agent enables you to update personal information such as email address, phone number, home address, blood type, and date of birth.

View paychecks AI agent

The View paychecks AI agent enables you to view paycheck summaries for the selected period.

HR Service Delivery Integration with SuccessFactors reference

Reference topics provide additional information about the lists and forms that you use to configure and administer HR Service Delivery Integration with SuccessFactors.

Components installed with HR Service Delivery Integration with SuccessFactors

Several types of components are installed with activation of the HR Service Delivery Integration with SuccessFactors application, including tables and user roles.

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Roles installed

Roles installed with HR Service Delivery Integration with SuccessFactors

Role title [name]	Description	Contains roles
SuccessFactors Admin [sn_hr_sf.admin]	• Can access all features and capabilities of HR Service Delivery Integration with SuccessFactors application. • Can configure worker profile settings.	sn_hr_integr_fw.admin

Scheduled flows installed

Scheduled flows installed with HR Service Delivery Integration with SuccessFactors

Scheduled flow	Description
Run Trigger SAP SuccessFactors Integrations Flow	Pulls data from SuccessFactors to ServiceNow. By default the flow is in inactive state. For information on how to activate the flow, see Activating schedule flows.

Tables installed

The tables required for HR Service Delivery Integration with SuccessFactors are obtained from the Enterprise Service Management Integrations Framework. The tables get auto-installed with the Enterprise Service Management Integrations Framework installation when you activate the HR Service Delivery Integration with SuccessFactors application. For more information, see Components installed with Enterprise Service Management Integrations Framework.

Subflow-agent mapping for HR Service Delivery Integration with SuccessFactors

View the subflow-agent mapping for HR Service Delivery Integration with SuccessFactors.

Spoke subflow-agent mapping

AI agent	Feature Name	Service Name	Subflow
Worker profile retriever AI agent	Worker Management	Get Worker	SuccessFactors HR - Look up Worker Profile
Time off requester AI agent	Leave Management	Time off balance	SuccessFactors HR - Get Time off balance
		Create Time Off Request	SuccessFactors HR - Request Time Off
Employee holiday calendar retrieval AI agent		Holiday Calendar	SuccessFactors HR - Get Employee Holiday Calendar
Employee total rewards information AI agent	Benefits Management	Total Rewards	SuccessFactors HR - Get Total Rewards

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Spoke subflow-agent mapping (continued)

AI agent	Feature Name	Service Name	Subflow
Employee details updater AI agent	Human Capital Management	Update Personal Details	SuccessFactors HR - Update Personal Details
	Worker Management	Get Worker	SuccessFactors HR - Look up Worker Profile

Source for HR Service Delivery Integration with SuccessFactors

Once you set up the HR Service Delivery Integration with SuccessFactors application, the source record for SuccessFactors application is automatically created in Enterprise Service Management Integrations Framework, Source module. The SuccessFactors source record in the in Enterprise Service Management Integrations Framework application contains a predefined set of properties and HR Integration Services.

Properties

Field	Description
Full-pull	When set to **True**, all the active users, active trainings, incomplete to-dos from the SuccessFactors system are pulled into respective tables in ServiceNow instance. When set to **False**, only modified users, modified trainings, modified transcripts (based on last successful schedule run time) are pulled from the SuccessFactors system are pulled into respective tables in ServiceNow instance. **Note:** If there is no information on the last successful schedule run time, the first pull will always be a full pull.

HR Service Delivery with Ultimate Kronos Group

With the HR Service Delivery with Ultimate Kronos Group application, provide employee assistance through conversations in the Virtual Agent conversational (client) interface. Enable employees to view their accrual leave balances, schedules, and upcoming shifts from the Ultimate Kronos Group application in ServiceNow Employee Center.

Key features include:

- Build conversations that are based on keywords that an employee enters.
- Apply Natural Language Understanding (NLU) models, which enable the Virtual Agent to pick utterances for understanding, processing, and responding to what employees are saying during a conversation.

Application setup

First, you must activate the HR Service Delivery Integration with the Ultimate Kronos Group [sn_hr_ukg] application from the ServiceNow Store. Next, you must set up HR Service Delivery Integration with Ultimate Kronos Group application.

Overview of HR Service Delivery with Ultimate Kronos Group

After the activation and setup of HR Service Delivery Integration with Ultimate Kronos Group is complete, the HR Service Delivery with Ultimate Kronos Group responds to what employees or

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managers are saying during a conversation, and allows employees to view the following details from the Ultimate Kronos Group application in the Employee Center.

Topics accessible to employees

As an employee, you can view your accrual balances, work hours, list of punches, schedules, time-off requests, and upcoming shifts using the Virtual Agent.

Retrieve My Accrual Balance

You can view the aggregate of accrual leaves balance (by type) by selecting the **Retrieve My Accrual Balance (Template)**. If the NLU model is trained, you can ask a question in the chat (for example, show my sick leaves) and view the balance of a single type of leave.

Retrieve My Hours Worked

You can view the number of hours worked for a given period by selecting the **Retrieve My Hours Worked (Template)** and choosing a symbolic period.

Retrieve My List of Punches

You can view the list of punches by selecting the **Retrieve My List of Punches (Template)** and choosing a symbolic period.

Retrieve My Schedule

You can view the work schedule for a given period by selecting the **Retrieve My Employee Schedule (Template)** and choosing a symbolic period. If the NLU model is trained, you can ask a question in the chat (for example, my work schedules of the previous pay period) and view the work schedules for that symbolic period.

You can also view your schedule location for three days from the current day.

Retrieve My Time Off Requests

You can view the status of the time off requests by selecting the **Retrieve My Time off Requests (Template)** and specifying an end date.

Note: Ensure that the selected time-off period ranges for 15 days from the start date (current day).

Retrieve My Upcoming Shift

You can view the next upcoming shift by selecting the **Retrieve My Upcoming Shift (Template)**. If the NLU model is trained, you can ask a question in chat (for example, show my shifts) and directly view the next upcoming shift.

You can also view your location along with the shift date and time.

Topics accessible to managers

As a manager, you can access and view the locations, schedules, and time-off requests of your team using the Virtual Agent.

Note: The templates are visible only to a user with the manager role.

Reportee's Location Today

You can view the location of a reportee in the team (for today) by selecting the **Reportee's Location Today (Template)**.

Reportee's Schedule Changes

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You can view the schedule change requests such as shift cover, shift swap, availability change, open shift, and self-schedule. Follow the onscreen instructions for more information on the schedule changes.

Note: You can view the change requests in offered, invalidated, or pending state.

Reportee's Time Off Requests

You can view the pending time off requests from your team for a specified time period. You can check the requests from the individual team members or the entire team.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Get started

Configure	Reference
	
Plan and configure your integration.	Get details about components like fields, tables, and properties.

Configuring HR Service Delivery with Ultimate Kronos Group

Set up the HR Service Delivery with Ultimate Kronos Group application to start pulling information, such as accrual balances and shifts from the Ultimate Kronos Group application into a ServiceNow application.

Before you begin

Role required: sn_hr_core.admin

Activate the HR Service Delivery Integration with Ultimate Kronos Group [sn_hr_ukg] application, which automatically activates the following plugins and spoke:

- Glide Virtual Agent [com.glide.cs.chatbot]
- Human Resources Scoped App: Core [com.sn_hr_core]
- Employee Service Center [com.sn_hr_service_portal]
- Virtual Agent Service Portal Widgets [com.glide.va.sp_widgets]
- NLU Workbench [com.snc.nlu_studio]
- Predictive Intelligence [com.glide.platform_ml]
- UKG spoke

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Procedure

1. Integrate your Ultimate Kronos Group application with your ServiceNow instance.
   Register an OAuth application in the Ultimate Kronos Group application and authenticate requests from ServiceNow. For more information, see Set up the UKG spoke.
2. Complete the one time set up of loading accrual codes from the Ultimate Kronos Group application into ServiceNow.
   For more information, see Set up accrual codes.
3. The **Person number** field in Ultimate Kronos Group application should match the **Employee number** field in the ServiceNow User table.
   If the **Person number** field in Ultimate Kronos Group application matches with some other field in the ServiceNow User table, you must override the getPersonNumberBySysID method in HRKronosUtils script.

Set up symbolic periods

By default, the symbolic periods of Ultimate Kronos Group application are set up when you activate the HR Service Delivery Integration with Ultimate Kronos Group application. Symbolic periods denote the time periods that are identifiable by the Ultimate Kronos Group application.

Before you begin
Role required: sn_hr_ukg.admin

About this task
When an employee posts a question in virtual chat in Employee Center, an NLU model selects an utterance from the question, checks for its mention in vocabulary sources, identifies its symbolic code and ID. A flow uses the ID to pull the requested information from the Ultimate Kronos Group application and display in virtual chat in Employee Center.

Procedure

If you have made any modifications to the symbolic periods in Ultimate Kronos Group:

a. Navigate to **HR UKG Integrations** > **Symbolic periods** and click**Refresh Symbolic Periods.**

b. Navigate to **NLU Workbench** > **Vocabulary sources**, and synchronize **@UKGTimeKeepingSymbolicPeriod**.

c. Navigate to**NLU Workbench** > **Models**, select **UKG Topics Model**, and click **Train**.

Set up accrual codes

Complete the one time set up of loading accrual codes from the Ultimate Kronos Group application into a ServiceNow application. Accrual codes help in pulling accrual leave balances of employees from the Ultimate Kronos Group application into a ServiceNow application.

Before you begin
Role required: sn_hr_ukg.admin

About this task
When an employee posts a question in virtual chat in Employee Center, the NLU model selects an utterance from the question, checks for its mention in vocabulary sources, identifies its accrual code and ID. A flow uses the ID to pull the requested information from the Ultimate Kronos Group application and display in virtual chat in Employee Center.

For example, an employee wants to view the accrual balance for annual leave. The NLU model selects annual leave as the utterance. It identifies **Annual Leave** as the accrual code whose ID in

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Ultimate Kronos Group is **1531**. The flow uses the ID **1531** to pull the requested information from the Ultimate Kronos Group application.

Procedure

If you have made any modifications to accrual periods in Ultimate Kronos Group:

a. Navigate to **HR UKG Integrations** > **Accrual codes** and click **Refresh Accrual codes.**

b. Navigate to **NLU Workbench** > **Vocabulary sources**, and synchronization **@AccrualCode**.

c. Navigate to**NLU Workbench** > **Models**, select the **UKG Topics Model**, and click **Train**.

Train the NLU model

Use the UKG Topics Model (Natural Language Understanding model) to recognize and process employee utterances, intentions (intents), and objects of, or contexts for, an action (entities).

Before you begin
Role required: sn_hr_ukg.admin

About this task
You can train the model dataset iteratively using utterance examples so that the system predicts the optimal intent output for a new utterance.

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models**.
2. Select **UKG Topics Model**.
3. Click **Train**.

Subflows

Use the subflows to pull data from the Ultimate Kronos Group application into a ServiceNow application.

Before you begin
Role required: None

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. In the Subflow lists, view the following:

Subflow

Subflow	Description
Employee Accrual Balance	Pulls the accrual leave balances (by type) of an employee from the Ultimate Kronos Group application into a ServiceNow application.
Extract Employee Schedule	Pulls the schedule of an employee from the Ultimate Kronos Group application into a ServiceNow application.

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Subflow	Description
Extract Hours Worked	Pulls the number of hours that the employee has worked from the Ultimate Kronos Group application into a ServiceNow application.
Extract Time Off Requests	Pulls the future time off requests of an employee from the Ultimate Kronos Group application into a ServiceNow application.

Reference - HR Service Delivery with Ultimate Kronos Group

Reference topics provide additional information about the HR Service Delivery with Ultimate Kronos Group, including lists and forms.

Components installed with HR Service Delivery Integration with Ultimate Kronos Group

Several types of components are installed with activation of the HR Service Delivery Integration with Ultimate Kronos Group plugin, including tables and user roles.

Roles installed

Roles installed with HR Service Delivery Integration with Ultimate Kronos Group

Role title [name]	Description	Contains roles
UKG admin [sn_hr_ukg.admin]	• Can set up symbolic periods and accrual codes. • Can train the UKG Topics Model.	None

Tables installed

Tables installed with HR Service Delivery Integration with Ultimate Kronos Group

Table	Description
Accrual Code [sn_hr_ukg_accrual_code]	Stores accrual codes with their associated IDs. Accrual codes help in pulling accrual leave balances of an employee from the Ultimate Kronos Group application into ServiceNow.
Symbolic Period [sn_hr_ukg_symbolic_period]	Stores symbolic periods with their associated IDs. Symbolic periods denote the time periods that are identifiable by the Ultimate Kronos Group application.

Document Template integration with AdobeSign

The ServiceNow® Document Template integration with AdobeSign application enables you to use the Adobe Sign application for signing documents that are generated from ServiceNow Document Templates.

Key features

- Enable multiple participants to collaboratively work on a single document.
- Choose a signing type.

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- Select a signing partner.
- Sign with mobile and portal from anywhere.

Note: The Document Template integration with AdobeSign application supports the signing of HTML and PDF document templates that are generated from Document Templates.

Activation information

First, activate the Document Template Integration with AdobeSign [sn_dt_adobesign] and Document Templates [sn_doc] applications from ServiceNow Store. Activating the Document Template integration with AdobeSign application automatically activates the Adobe Acrobat Sign spoke. Next, set up the Adobe Sign spoke.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Components installed with Document Template integration with AdobeSign

Several types of components are installed with activation of the Document Template Integration with AdobeSign [sn_dt_adobesign] plugin, including tables and user roles.

Demo data is available for this feature.

Roles installed

Roles assigned with adobe activation

Role name	Description	Contains roles
Adobe Sign Admin [sn_dt_adobesign.admin]	• Can configure document templates for Adobe Sign. • Can create Adobe Sign groups.	None

Tables installed

Tables installed with adobe activation

Table	Description
Document temoplate Adobe Sign groups [sn_dt_adobesign_group]	Stores Adobe Sign groups. For more information, see Create adobe sign groups

Configure document templates for Adobe Sign

Configure document templates to enable signing using the Adobe Sign application.

Before you begin
Role required: sn_dt_adobesign.admin

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Procedure

1. Navigate to **All Document Templates**.
2. Select a template.
3. Fill in the required fields on the form.
   a. In the **Signing type** field, select **Adobe Sign**.
   b. Define participants, define tasks for participants, and mark signature blocks.
   c. Associate the document template to the HR template of a service and initiate document tasks from a case.

What to do next

User who receives the document task can use the Adobe Sign application for signing the document.

Create adobe sign groups

Connect your ServiceNow instance to a particular group to send and receive agreements on a business use case.

Before you begin

Role required: sn_dt_adobesign.admin

Procedure

1. Navigate to **Document Templates** > **Adobe Sign Integration** > **Adobe Sign Groups**.
2. On the form, fill in the fields:

Adobe Sign Groups form

Field	Description
Group ID	Unique ID associated with the record.
Connection Alias	Alias record to associate with the connection.
Group Name	Name to uniquely identify the Adobe Sign group.
Role	Roles granted to the Adobe Sign group.

3. Click **Submit**.

Document Template integration with Docusign

The ServiceNow® Document Template integration with Docusign application enables you to use the Docusign application for signing documents that are generated from ServiceNow Document Templates.

Key features

- Enable multiple participants to collaboratively work on a single document.
- Choose a signing type.
- Select a signing partner.
- Sign with mobile and portal from anywhere.

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Note: The Document Template integration with Docusign application supports the signing of HTML and PDF document templates that are generated from Document Templates.

Activation information

First, activate the Document Template Integration with DocuSign [sn_dt_docusign] and Document Templates [sn_doc] applications from ServiceNow Store. Activating the Document Template integration with Docusign application automatically activates the Docusign spoke.

Next, set up the Docusign spoke. For more information, see Docusign eSignature Spoke.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Components installed with Document Template integration with Docusign

Several types of components are installed with activation of the Document Template Integration with DocuSign [sn_dt_docusign] plugin, including user roles.

Demo data is available for this feature.

Roles installed

List of roles installed with DocuSign

Role title [name]	Description	Contains roles
Docusign Admin [sn_dt_docusign.admin]	Can configure document templates to use Docusign for signing.	None

Configure Document Templates for DocuSign

Configure document templates to enable signing using the Docusign application.

Before you begin
Role required: admin

Procedure

1. Navigate to **All Document Templates**.
2. Select a template.
3. Fill in the required fields on the form.
   a. In the **Signing type** field, select **DocuSign**.
   b. Define participants, define tasks for participants, and mark signature blocks.
   c. Associate the document template to the HR template of a service and initiate document tasks from a case.

What to do next
User who receives the document task can use the Docusign application for signing the document.

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Employee Relations integration with Navex Ethicspoint

The ServiceNow® Employee Relations integration with Navex Ethicspoint application pulls employee relation cases from NAVEX EthicsPoint into ServiceNow Platform, enabling an HR Agent to work on employee relation cases from an ServiceNow instance.

Activation information

First, activate the Employee Relations integration with NAVEX EthicsPoint (sn_hr_navex_ep) application from ServiceNow Store. Activating the Employee Relations integration with NAVEX Ethics application automatically activates, Enterprise Service Management Integrations Framework, Employee Relations, and Navex EthicsPoint spoke.

Next, set up Set up Employee Relations integration with Navex Ethicspoint.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Components installed with Employee Relations integration with Navex Ethicspoint

Several types of components are installed with activation of the Employee Relations integration with Navex Ethicspoint plugin, including tables and user roles.

Roles installed

List of roles installed with Navex

Role title [name]	Description	Contains roles
Admin [sn_hr_navex_ep.admin]	• Can Configure properties. • Can Map fields.	

Tables installed

List of tables installed with Navex

Table	Description
Field Value Map [sn_hr_integr_fw_field_value_map] **Note:** This table is visible in the Enterprise Service Management Integrations Framework application scope.	Stores mappings between Navex EthicsPoint fields and ServiceNow platform fields.

Set up Employee Relations integration with Navex Ethicspoint

Understand how to set up the Employee Relations integration with Navex Ethicspoint application for pulling and pushing employee relations case data from the Navex EthicsPoint system into the ServiceNow system.

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Before you begin
Role required: sn_hr_navex_ep.admin

Procedure

1. Install updates sets from the Supporting Links and Docs section in ServiceNow Store.
2. Allow RCAs manually.
   Allow the Restricted Caller Access records with Status = **Requested** and Source Scope = **Employee Relations integration with Navex EthicsPoint**.
3. For better performance, index Source field: external_id mapped to Target field: correlation_id in Transform maps.
   For more information, see create a table index.
4. Set up Navex EthicsPoint spoke.
   For more information, see Set up Navex EthicsPoint spoke.
5. Configure properties.
6. Map fields.

Configure properties

Configure properties to ensure that data is properly mapped between the Navex EthicsPoint system and the ServiceNow system.

Before you begin
Role required: sn_hr_navex_ep.admin

Procedure

1. Navigate to **ER Navex Integration** > **Administration** > **Properties**.
2. Configure the following properties:

Properties

Name	Description
Tier Id in Navex EthicsPoint	Tier ID that contains the Navex EthicsPoint instance.
Comma-separated Ready to Pull Status Ids in Navex EthicsPoint	Status IDs that are to be pulled from Navex EthicsPoint instance into ServiceNow instance. For example, status IDs of Open, Closed, or Review.
Comma-separated list of closed status ids in Navex EthicsPoint	Status IDs of closed cases that are pulled from Navex EthicsPoint instance into ServiceNow instance.
Comma-separated Primary Issue Type Ids in Navex EthicsPoint	Primary issue type case IDs that are pulled from Navex EthicsPoint instance into ServiceNow instance. For example, primary issue type of a case can be misconduct, discrimination, or accounting.
HR Service used for the case imported from Navex EthicsPoint	HR service to which you want to associate the employee relation case.
Pull attachments. Please configure MID Server if you want to pull the attachments.	Option to pull cases along with the attachments from Navex EthicsPoint instance into ServiceNow instance.

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Name	Description
	To use this feature, you must enable the MID Server. For more information, see Configure MID Server network connectivity
Pull the attachments from the case file. (Make sure that the mid server is on, when this is used)	Option to provide the **Sync attachments** button on cases that are that are already pulled from Navex EthicsPoint instance into ServiceNow instance. The **Sync attachments** button can be used to pull attachments of cases at a later point in time. To use this feature, you must enable the MID Server. For more information, see Configure MID Server network connectivity

3. Click **Save**.

Map fields

Map ServiceNow fields with the fields that are pulled from NAVEX EthicsPoint. Enable an HR Agent to work on employee relation cases from a ServiceNow instance.

Before you begin

Role required: sn_hr_navex_ep.admin

Procedure

1. Navigate to **ER Navex Integration** > **Administration** > **Field Value Map**.
2. Click **Get Navex Field Values**.

   All the fields from Navex EthicsPoint are pulled into ServiceNow instance.

   For complete details of fields that are imported, refer to this KB article.
3. Enter the required values in the **Value** field and **Primary** field for each of the record that is displayed.

Source for Employee Relations integration with Navex Ethicspoint

Once you set up the Employee Relations integration with Navex Ethicspoint application, the source record for NAVEX EthicsPoint application is automatically created in Enterprise Service Management Integrations Framework, Source module. The Navex EthicsPoint source record in the Enterprise Service Management Integrations Framework application contains a predefined set of HR Integration Services.

HR services

After you set up the Employee Relations integration with Navex Ethicspoint application, integration services for Navex EthicsPoint are automatically created in Enterprise Service Management Integrations Framework. The flows in integration Services communicate with the Navex EthicsPoint system to pull and push data related to employee relation cases.

Integration Services for Navex EthicsPoint

Name	Description
Update Employee Relation Cases	Pushes data from ServiceNow Platform into Navex EthicsPoint. For example, when an employee relation case is closed its status is pushed to Navex EthicsPoint.

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Integration Services for Navex EthicsPoint (continued)

Name	Description
Get Employee Relation Cases	Pulls employee relation cases from Navex EthicsPoint into ServiceNow Platform.

Transform maps

Transform maps specify data relationships between source table and target table.

For details on the transform maps, navigate to **ER Navex Integration** > **Transform Maps**.

Transformation Maps

Name	Description
ER Case Transform Map	Maps employee relation cases from the Case Staging [sn_hr_navex_ep_case_staging] table to the Employee Relations Case [sn_hr_er_case] table.
ER Involved Party Staging	Maps involved participants of cases from the Participant Staging [sn_hr_navex_ep_participant] table to the Involved Party [sn_hr_er_involved_party] table.
ER Evidence Transform Map	Maps employee relation case evidences from the Case File Staging [sn_hr_navex_ep_file_staging] table to the Evidence [sn_em_evidence] table.

HR Service Delivery for Healthcare

The ServiceNow® HR Service Delivery for Healthcare application creates a standardized, digitized, and automated physician onboarding workflow using the Healthcare Professional data model. The application enables you to see the full picture for all the required onboarding information during and after physician onboarding. HR Service Delivery for Healthcare is a new application in the Australia release.

Get started

Explore  Learn about HR Service Delivery for Healthcare features	Configure  Install the necessary applications
Use	Reference

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Securely access, update and maintain details of an healthcare professional.



Get details about component like fields, tables and properties.

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore HR Service Delivery for Healthcare

Learn more about HR Service Delivery for Healthcare with a sample workflow and reviewing the benefits it provides to users in your healthcare organization.

HR Service Delivery for Healthcare overview

HR Service Delivery for Healthcare enables you:

- securely access, update, and manage the data of a healthcare professional via the Healthcare Professional data model.
- set up and auto-create necessary tasks to onboard a healthcare professional smoothly into your organization.

HR Service Delivery for Healthcare workflow

The following infographic provides you with an end to end explanation of how to use the HR Service Delivery for Healthcare application along with Journey designer and Employee Center.

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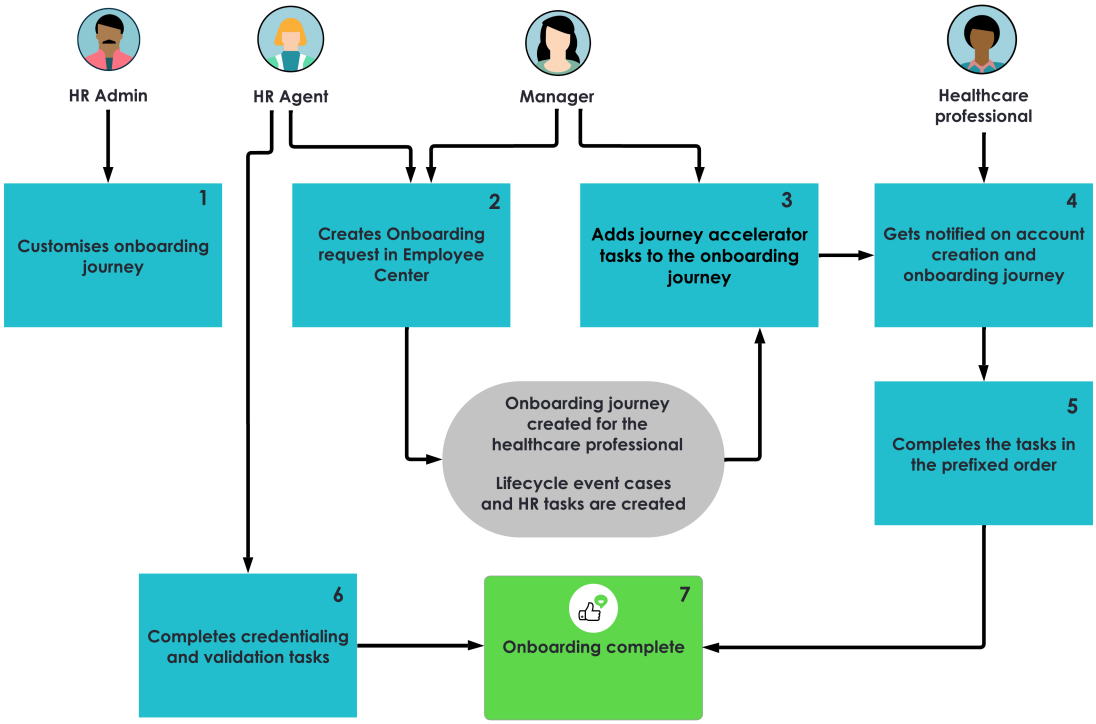

For more details, see Using HR Service Delivery for Healthcare.

HR Service Delivery for Healthcare benefits

Key benefits

Benefit	Feature	Users
HR profile and Employee profile data models capture generic details of an employee, while Healthcare Professional data model stores confidential data pertaining to a healthcare professional, such as medical degree and employment history, professional liability insurance details, hospital affiliations, and payer enrollments details. The Healthcare Professional Profile data model enables your organization to access, track, update healthcare profile information throughout the period of employment of the healthcare professional. Healthcare professional profile records are stored confidentially and are not publicly viewable.	Healthcare professional data model	HR agents and Managers
Step by step guidance enabling you to onboard a healthcare professional smoothly into your organization. Use the demo Healthcare Employee Onboarding workflow in Journey designer	Healthcare onboarding journey with predefined activity sets	Healthcare administrator or HR admin

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Key benefits (continued)

Benefit	Feature	Users
as a guidance to set up and automate tasks for a new hire (healthcare professional) at a healthcare organization. • Auto-create profile for the healthcare professional, auto-create email account, and auto-initiate necessary form intake tasks for the healthcare professional. • Create credentialing and validation tasks for HR agents to review and validate the information submitted by the healthcare professionals.		
HR services, such as Healthcare Employee Onboarding Journey, Sign Onboarding Disclosures, Collect Employee Information and Validate, Validate Submitted information, and HR tasks are available to use with the HR Service Delivery for Healthcare application.	New HR services	HR agents

Configure HR Service Delivery for Healthcare

Plan and configure your HR Service Delivery for Healthcare.

Configuration overview

First, activate the HR Service Delivery for Healthcare [sn_hr_hc] application from ServiceNow Store.

Activating HR Service Delivery for Healthcare also activates the following applications:

- Journey Designer [sn_jny]
- Employee Center Pro [sn_ex_sp_pro]
- UI shared library [sn_ui_lib]
- Document Templates [sn_doc]
- Content Experiences [sn_ca]
- Content Publishing [sn_cd]
- Employee experience taxonomy [sn_ect]
- Human Resources Scoped App: Core [com.sn_hr_core]
- Employee Center - Pro [com.sn_ex_employee_center_pro]
- User Criteria Scoped API [com.glideapp.user_criteria.scoped.api]
- Content Publishing [com.sn_content_delivery]
- Healthcare Professional Data Model [sn_hc_professional]
- Admin Experience Framework [sn_ace]
- Journey Accelerator [sn_ja]
- Professional Data Model [sn_professional]
- Employee Center [sn_ex_sp]
- Employee Center Core [sn_hr_sp]

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- Employee Experience Foundation [sn_ex_emp_fd]
- Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent]
- Signature Pad [com.snc.signaturepad]
- Scoped Application Restricted Caller Access [com.glide.scope.access.restricted_caller]
- Employee Service Center [com.sn_hr_service_portal]

Using HR Service Delivery for Healthcare

Use the HR Service Delivery for Healthcare application to set up and auto-create necessary tasks to onboard a healthcare professional smoothly into your organization. In addition, securely access, update, and manage the data of a healthcare professional via the Healthcare Professional data model.

Below is an end to end explanation of how to use the HR Service Delivery for Healthcare along with Journey designer and Employee Center:

1. **Configure application**

   As an HR administrator, plan and configure HR Service Delivery for Healthcare by installing the necessary applications.

2. **Customize workflow**

   As a health care administrator, customize the Healthcare Employee Onboarding workflow to tailor to your organization needs.

3. **Place onboarding request**

   As a hiring manager or an HR agent, request an onboarding journey for a healthcare professional from Employee Centre. This triggers onboarding journey for the healthcare professional, creating a set of HR tasks for healthcare professional and HR agents.

   - An HR profile and a Healthcare professional profile is created for the healthcare professional.
   - An onboarding journey is auto-created for the healthcare professional, an email account is auto-created, and the employee is notified about the journey via email.
   - HR Tasks, such as pre-hire tasks, credentialing and verification, background checks, enrollments, required learnings, are auto-triggered and assigned based on the order defined for the tasks in the journey.
   - After the healthcare professional completes the profile intake tasks, the data is sent to the HR agents for validation and credentialing. Once the tasks in the journey are complete, the healthcare employee onboarding request is marked complete.

4. **Use healthcare professional data model**

   Information provided by the healthcare professional is securely managed in the Healthcare Professional data model. The Healthcare Professional Profile data model enables the organization to access and track information of the healthcare professional throughout the period of employment. Healthcare Professional Profile records are stored confidentially and are not publicly viewable.

Customize Healthcare Employee Onboarding workflow

Customize Healthcare Employee Onboarding workflow to tailor to your organization needs.

Before you begin

Role required: Healthcare admin (sn_hr_hc.admin)

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Procedure

1. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
2. Select **Healthcare Employee Onboarding Journey**.
   You can continue to use the default settings or update the values as per your business requirements.
   - In Lifecycle event type, the default value is Healthcare Employee Onboarding. Open the record to add, remove, or update the activity from activity sets as per your business requirements. You can also choose to select another Lifecycle event type based on your business needs.
   - In Journey Configuration, the default value is Healthcare Employee Onboarding. Open the record to add, remove, or update the activity and stages as per your business requirements. You can also choose to select another journey configuration based on your business needs.
3. Click **Update**.

What to do next

When a hiring manager places an onboarding request using the **Healthcare Employee Onboarding** catalog in Employee Center, the Healthcare Employee Onboarding Journey service is triggered and HR tasks are initiated for HR agents and the healthcare professional.

Request onboarding journey

Request an onboarding journey for a healthcare professional. This triggers onboarding journey for the healthcare professional, creating a set of HR tasks for healthcare professional and HR agents.

Before you begin

Role required: None

Procedure

1. Navigate to **All** > **Employee Center**.
2. From onboarding, select the **Healthcare Employee Onboarding** catalog.
3. On the form, fill in the fields:
   See Healthcare Employee Onboarding form.
4. In **Additional needs**, you can select options such as Needs work visa, Needs to transfer work visa, or Needs relocation assistance.
5. To add any files to the request, click **Add attachments**.
6. Click **Submit**.

Healthcare Professional data model

The Healthcare Professional data model stores confidential HR data, such as name, personal contact information, email addresses, professional liability insurance details, medical degree and employment history healthcare professional, previous employment history.

The Healthcare Professional Profile data model enables the organization to access and track information of the healthcare professional throughout the period of employment. Healthcare Professional Profile records are stored confidentially and are not publicly viewable.

Auto-create a Healthcare professional profile

Auto-create a healthcare professional profile when a manager or an hiring agent places an onboarding request for a healthcare professional. Store the details of the health care professional by maintaining strict edit or view permissions.

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Before you begin
Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. On the form, fill in the required fields.
   Most of the data in these fields are auto-filled based on information provided in healthcare employee onboarding form and details provided by healthcare professional on the profile intake forms in Employee Center. See Healthcare professional profile form.
3. Click **Update**.

Record Professional ID details

Store the professional ID details that a healthcare professional provides via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

About this task
Professional ID is a unique ID granted to a healthcare professional when the healthcare professional registers in a healthcare network.

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Professional ID** related list, open the auto-created record.
4. On the form, fill in the required fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Professional ID form.
5. Click **Update**.

Record professional liability insurance

Store the professional liability insurance details that a healthcare professional provides via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Professional Liability Insurance** related list, open the auto-created record.
4. On the form, fill in the required fields:

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Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Professional liability Insurances form.

5. Click **Update**.

Add a professional reference

Store the professional reference details that a healthcare professional provides via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Professional Reference** related list, open the auto-created record.
4. On the form, fill in the required fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Professional reference form.
5. Click **Update**.

Record professional specialty details

Store details of the healthcare area in which the healthcare professional specialises and has obtained the required trainings and certifications. These details are provided by healthcare professional via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Professional Specialty Details** related list, open the auto-created record.
4. On the form, fill in the required fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Professional speciality form.
5. Click **Update**.

Record practice location

Record practice location details of the healthcare professional. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

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Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**.
   Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Practice Location** related list, open the auto-created record.
4. On the form, fill in the fields.
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center.
5. Click **Update**.

Record malpractice claim history

Record Malpractice claim history of the healthcare professional. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin

Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**.
   Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Malpractice Claim History** related list, click **New**.
4. On the form, fill in the fields.
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Malpractice history form.
5. Click **Update**.

Record education and training

Record education and training details of the healthcare professional. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin

Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**.
   Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Education and Training** related list, select the auto-created record.
4. On the form, fill in the fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Education and Training form.
5. Click **Update**.

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Record employment history

Store employment history details of the healthcare professional. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Employment History** related list, select the auto-created record.
4. On the form, fill in the fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Employment history form.
5. Click **Update**.

Record language

Record languages spoken by the healthcare professional. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.profile_writer

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**. Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Languages Spoken** related list, select the auto-created record.
4. On the form, fill in the fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Languages Spoken form.
5. Click **Update**.

Record hospital affiliations

Record the hospital affiliation details of healthcare provider. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin
Role required: admin

About this task
Hospital affiliations provide details of affiliated hospitals at which the healthcare professional treats patients.

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Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**.
   Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Hospital Affiliations** related list, select the auto-created record.
4. On the form, fill in the fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Hospital Affiliations form.
5. Click **Update**.

Record payer enrollments

Record payer enrollment details of healthcare professional. The healthcare professional provides these details via the profile intake forms in Employee Center.

Before you begin
Role required: sn_hc_professional.payer_writer

About this task
Payer enrollment is a process in which a medical provider registers in a healthcare insurance network.

- allows patients to choose healthcare providers tied to an insurance network.
- helps in on time payment to medical providers for healthcare services offered.

Procedure

1. Navigate to **All** > **Healthcare Professional profile** > **Healthcare professional profiles**.
   Alternatively, you can also view the Healthcare Professional Profiles by navigating to **All** > **Agent Workspace for HR Case Management**. In Lists, select Healthcare Professional Profiles.
2. Open a Healthcare professional profile.
3. In the **Payers Enrollment** related list, select the auto-created record.
4. On the form, fill in the fields:
   Most of the data in these fields are auto-filled based on information provided by healthcare professional on the profile intake forms in Employee Center. See Payers Enrollment form.
5. Click **Update**.

HR Service Delivery for Healthcare reference

Reference topics provide additional information about the lists and forms that you use to configure and administer HR Service Delivery for Healthcare.

Installed with HR Service Delivery for Healthcare

Several types of components are installed with activation of the HR Service Delivery for Healthcare plugin, including tables and user roles.

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Roles

Roles installed with HR Service Delivery for Healthcare

Role title [name]	Description	Contains roles
Professional Admin [sn_hc_professional.admin]	• Can create, edit, and delete healthcare professional profile. • Can customize the healthcare onboarding journey. • Can edit the payroll enrollment records details.	• sn_hc_professional.payer_writer • sn_hc_professional.profile_writer
Professional Payer Reader [sn_hc_professional.payer_reader]	Can view payroll enrollment record details.	None
Professional Payer Writer [sn_hc_professional.payer_writer]	Can edit payroll enrollment record details.	sn_hc_professional.payer_reader
Professional Profile Reader [sn_hc_professional.profile_reader]	Can view healthcare professional profile.	None
Professional Profile Writer [sn_hc_professional.profile_writer]	Can edit healthcare professional profile.	sn_hc_professional.profile_reader

Tables

Tables installed with HR Service Delivery for Healthcare

Table	Description
Hospital Affiliation [sn_hc_professional_hospital_affiliation]	Stores the healthcare professional details related to hospital affiliations.
Payers enrollment [sn_hc_professional_payers_enrollment]	Stores the healthcare professional details related to payer enrollments.

Healthcare professional profile form

Access and update confidential HR data of an healthcare professional, such as name, personal contact information, email addresses, professional liability insurance details, and medical degree, using the Healthcare professional profile form.

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Healthcare Professional Profile form

Field	Description
User	Name of the healthcare professional.
Employee profile	Employee profile that is associated to the healthcare professional.
HR profile	HR profile that is associated with the healthcare professional.
First name	First name of the healthcare professional.
Middle name	Middle name of the healthcare professional.
Last name	Last name of the healthcare professional.
Gender	Gender of the healthcare professional.
Primary education	Education details of the healthcare professional.
Uniform size	Uniform size of the healthcare professional.
Active	Option to make the healthcare professional profile record available to use across workflows and teams.
Locked	Option to disable re-editing of profile fields by healthcare professional once the profile intake forms are submitted. **Note:** By default, this option is enabled. An HR agent can disable the option to edit the record details.
Professional type	Type of profession: healthcare professional.
Provider type	Type of degree awarded to the healthcare professional. For example, MD, DMD, or DPM.
Other provider type	Option to specify other type of degree that is not listed in the **Provider type** field.
CAQH provider ID	CAQH ID of the healthcare professional issued by Council for Affordable Quality Healthcare (CAHQ).
Preferred contact medium	Mode of communication that is preferred by the healthcare professional. For example, email, telephone or fax.
Mobile phone	Mobile number of the healthcare professional.
Email	Email address of the healthcare professional.
Fax	Fax number of the healthcare professional.

Professional ID form

Access, update, and validate the Professional ID details of a healthcare professional in the Professional ID form.

Professional ID form

Field	Description
Professional profile	Professional profile associated to the healthcare professional.

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Professional ID form (continued)

Field	Description
ID number	Professional ID number of the healthcare professional.
Issue date	Date on which the Professional ID was issued to the healthcare professional.
Expiration date	Date when the Professional ID will be expired.
Active	Option to make the Professional ID record available to use.
Status	Status of the Professional ID record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
State of registration	State in which the Professional ID has been issued.
Country	Country in which the Professional ID has been issued.

Professional liability Insurances form

Access, update, and validate the Professional liability Insurance details of a healthcare professional in the Professional liability form.

Professional Liability Insurance form

Field	Description
Professional Profile	Professional profile of the healthcare professional.
Carrier name	Name of the company providing the professional liability insurance to the healthcare professional.
Policy name	Policy number issued by the company offering the professional liability insurance.
Effective date	Current effective date as per last enrolment.
Original effective date	Effective date on first purchase or enrolment of policy.
Expiration date	Date on which the professional liability insurance ends.
Coverage type	Type of professional liability insurance taken: Individual or Shared
Amount coverage per occurrence	Amount paid by insurer for claims submitted under one occurrence.
Aggregate coverage amount	Maximum amount that will be paid by the insurer for claims submitted for a set period of time.

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Professional Liability Insurance form (continued)

Field	Description
Active	Option to make the professional liability insurance record available to workflows and teams.
Is current	Option to indicate that the professional liability insurance is currently active and enrolled in.
Is self insured	Option to indicate that the healthcare professional has reserved some amount of personal money to be used as liability insurance.
Unlimited coverage	Option to indicate that unlimited coverage is given for the policy taken from the insurer.
Status	Status of the professional liability insurance record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Insurer address	Address of the company from which the professional liability insurance is taken by the healthcare professional.
Insurer city	City in which insurer office is located.
Insurer state/ province	State in which insurer office is located.
Insurer zip/postal code	Postal code of area in which insurer office is located.
Insurer country	Country in which insurer office is located.

Professional reference form

Access and validate the Professional reference details of a healthcare professional in the Professional reference form.

Professional Reference form

Field	Description
Professional profile	Professional profile of the healthcare professional.
First name	First name of the user who is added as professional reference.
Last name	Last name of the user who is added as professional reference.
Reference type	Reference type of the user: Credentialing or Professional.
Contact preference	Preferred mode of communication for the user who is added as professional reference.

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Professional Reference form (continued)

Field	Description
Email	Email address of the user who is added as professional reference.
Phone number	Phone number of the user who is added as professional reference.
Fax	Fax number of the user who is added as professional reference.
Active	Option to make the professional reference record available to use.
Status	Status of the professional reference record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Provider type	Degree awarded to the user.
Other provider type	Other type of degree awarded to the user.
Address	Address of the user.
City	City in which user resides.
State/ Province	State in which user resides.
Zip/Postal Code	Postal code of user address
Country	Country in which user resides.

Professional speciality form

Review and update the Professional speciality details of a healthcare professional in the Professional speciality form.

Professional Speciality Details form

Field	Description
Professional profile	Professional profile associated to the healthcare professional.
Professional specialty	Healthcare domain in which the healthcare professional specialises, or has taken the required training or certification.
Initial certification date	Date on which the healthcare professional received the specialization certificate.

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Professional Speciality Details form (continued)

Field	Description
Expiration date	Date on which the certification expires.
Recertification date	Date on which recertification needs to be taken by the healthcare professional.
Active	Option to make the professional speciality details record available to use by other workflow or teams.
Type	Type of certification: Primary or Secondary
Are you board certified	Option to indicate that the healthcare professional is certified by a medical board.
Certifying board code	Name of the certifying board code. **Note:** This field appears only when the **Are you board certified** field is selected.
If not board certified	Option to select when the user is not certified by a medical board. **Note:** This field does not appear when the **Are you board certified** is selected.

Malpractice history form

Access, update, and validate the Malpractice history details of a healthcare professional in the Malpractice history form.

Malpractice Claim History form

Field	Description
Professional profile	Professional profile of the healthcare professional.
Date of occurrence	Date when the malpractice occurred.
Date of claim filing	Date when the malpractice claim was submitted.
Profession liability insurance involved	Insurer selected for the claim.
Description	Additional details about the malpractice claim.
Active	Option indicating that the malpractice claim history record is active.
Is in NPDB	Option indicating that the claim history is in the National Practitioner Data Bank (NPDB) database.
Status	Status of the malpractice claim history record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents.

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Malpractice Claim History form (continued)

Field	Description
	• Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Claim status	Current status, whether the claim is in progress or resolved.
Resolution method	Type of resolution provided for the claim, for example, settled with prejudice, mediation, or arbitration.
Amount of settlement	Amount at which the claim got settled.
Amount paid	Total amount paid by the insurer for claim submitted.

Education and Training form

Access, update and validate the Education and training details of a healthcare professional in the Education and training form.

Education and Training form

Field	Description
Employee profile	Employee profile of the healthcare professional.
Professional profile	Professional profile of the healthcare professional.
Education type	Type of education received by the healthcare professional: training or degree.
Start date	Date when the education began.
End date	Date when the education ended.
Degree awarded	Type of degree awarded to the healthcare professional. This field appears only when **Degree** is selected in the **Education type** field.
Training type	Type of training received by the healthcare professional, for example, residency or internship.
Training specialty	Healthcare domain in which the healthcare professional has received a training.
Status	Status of the education and training record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents.

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Education and Training form (continued)

Field	Description
	• Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Institution code	Code associated to the educational institution.
Institution name	Name of the educational institute from where the healthcare professional has taken the training.
Institution address	Address of the educational institute from where the healthcare professional has taken the training.
Institution city	City in which the educational institute is located.
Institution state/province	State in which the educational institute is located.
Institution country	Country in which the educational institute is located.
Institution zip/ postal code	Postal code of area in which the educational institute is located.

Practice location form

Access, update, and validate the practice location details of a healthcare professional in the Practice location form.

Practice Location form

Field	Description
Professional profile	Professional profile of the healthcare professional.
Practice name (in Directory)	Practice name of the healthcare professional.
Corporation name (in W-9 form)	Name of the corporation in (W-9 format) to verify name, address, and tax ID.
Primary tax ID type	Type of tax ID: Primary or Individual.
Individual tax ID	Individual Tax ID number against which taxes are collected from the healthcare professional.
Group tax ID	Group tax ID (Employer Tax ID) against which taxes are collected.
Credentialing reference	Option to add a professional reference.
Office schedule	Working schedules of the health care professional, for example, 24 X 7.

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Practice Location form (continued)

Field	Description
Accept new patients	Option to indicate that the healthcare professional can accept new patients.
Accept new medicaid patients	Option to indicate that the healthcare professional can accept new medicaid patients.
Accept new medicare patients	Option to indicate that the healthcare professional can accept new medicare patients.
Active	Option to indicate that the practice location record is available to use.
Is current location	Option to indicate that this is the current practice location of the health care professional.
Is billing electronic	Option to indicate that electronic billing is generated at the affiliated hospital for the services rendered by healthcare professional.
Send correspondence here	Option to indicate that any correspondence (examples: letters) to the healthcare professional can be sent to the affiliated hospital.
Status	Status of the practice location record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Address	Address of practice location.
City	City in which practice location is situated.
State/province	State in which practice location is situated.
Zip/postal code	Postal code of area in which the practice location is situated.
Country	Country in which the practice location is situated.

Employment history form

Access, update, and validate the Employment history details of a healthcare professional in the Employment history form.

Employment History form

Field	Description
Employee profile	Employee profile associated to the healthcare professional.

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Employment History form (continued)

Field	Description
Professional profile	Professional profile associated to the healthcare professional.
Employment history type	Option indicating whether employed or had a gap in employment.
Employment type	Nature of employment, for example, Consultant, Trainee, or Contractor.
Start date	Date when the employment began at an organization.
End date	Date when the employment ended at an organization.
Status	Status of the employment history record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the data and reject due to insufficient or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Employer name	Name of the organization at which the healthcare professional has worked.
Employer address	Address of the organization at which the healthcare professional has worked.
Employer city	City in which the employer office is located.
Employer state/province	State in which the employer office is located.
Employer country	Country in which the employer office is located.
Employer zip/ postal code	Postal code of area in which the employer office is located.
Gap reason	Reason stated by the healthcare professional when **Employment gap** is selected in the **Employment type** field.

Languages Spoken form

Access, update, and validate the language details of a healthcare professional in the Languages form.

Languages Spoken form

Field	Description
Employee profile	Employee profile associated with the healthcare professional.

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Languages Spoken form (continued)

Field	Description
Professional profile	Professional profile associated with the healthcare professional.
Language code	Option to choose a language name.
Active	Option to indicate that the language spoken record is active.
Primary	Option to indicate that the language specified is primary language of the healthcare professional.
Status	Status of the languages spoken record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the profile data and reject due to insufficient date or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.

Hospital Affiliations form

Access, review and validate the Hospital Affiliation details of a healthcare professional in the Hospital Affiliations form.

Hospital Affiliations form

Field	Description
Healthcare professional profile	Profile of the healthcare professional.
Name	Name of the affiliated hospital at which the healthcare professional works.
Privilege start date	Date starting which the healthcare professional has the required permissions to work at a hospital affiliation. **Note:** This field appears only when **Temporary** is selected in the **Privilege type** field.
Privilege end date	Date until which the healthcare professional has the required permissions to work at a hospital affiliation. **Note:** This field appears only when **Temporary** is selected in the **Privilege type** field.
Privilege type	Level of privilege the heathcare professional has at the affiliated hospital: Temporary or Fully unrestricted

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Hospital Affiliations form (continued)

Field	Description
Type of admitting privilege	Nature of admitting privilege, for example, can the healthcare professional only admit a patient at an affiliated hospital, or admit, treat and perform surgeries at an affiliated hospital.
Percentage of admissions	Percentage of admissions that the healthcare professional accepts at an hospital affiliation.
Active	Option to indicate that the Hospital Affiliations record is active and available to use.
Is primary	Option to indicate that it is the primary hospital that the healthcare professional is affiliated to.
Status	Status of the hospital affiliations record: • New: When profile intake form is sent to the healthcare professional for filling. • Pending validation: When data is filled in by healthcare professional and sent for credentialing and validation to HR agents. • Invalid: When HR agents review the profile data and reject due to insufficient date or invalid details. • Valid: When HR agents validate and approve the information provided by the healthcare professional.
Address	Address of the affiliated hospital at which the healthcare professional works.
City	City in which affiliated hospital is located.
State/ Province	State in which affiliated hospital is located.
Zip	Postal code of area in which affiliated hospital is located.
Country	Country in which affiliated hospital is located.

Payers Enrollment form

Access, review and validate the Payers Enrollment details of a healthcare professional in the Payer enrollment form.

Payers Enrollment form

Field	Description
Healthcare professional profile	Profile associated to healthcare professional.
Payer name	Name of payer who makes payments to the healthcare provider.
Payer plan name	Name of payer plan.
Plan number	Unique plan number against which payments are made by healthcare provider.
Active	Option to indicate that the payer enrolment record is active.
Effective From	Date starting which payer enrolment is valid.

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Payers Enrollment form (continued)

Field	Description
Effective Till	Date until which payer enrolment is valid.

Healthcare Employee Onboarding form

A hiring agent or a manager places an onboarding request for a healthcare professional via the Healthcare Employee onboarding form in Employee Center.

Healthcare Employee Onboarding form

Field	Description
First name	First name of the healthcare professional.
Middle name	Middle name of the healthcare professional.
Last name	Last name of the healthcare professional.
Personal email	Personal email ID of the healthcare professional.
Mobile number	Mobile number of the healthcare professional.
Fax	Fax number of the healthcare professional.
Employment start date	Joining date of the healthcare professional.
Employment type	Nature of employment such as part time employee, full time employee, or contingent.
Location type	Location type such as hot desk, office based, or remote.
Home city	Home city of the healthcare professional.
Home state	Home state of the healthcare professional.
Title	Designation of the healthcare professional.
Department	Department to which the healthcare professional is associated.
Manager	Reporting manager of the healthcare professional.
Company Location	Location in which the healthcare organization is situated.

Integration of HR Service Delivery with ServiceNow applications

Extend HR Service Delivery capabilities by integrating with other ServiceNow applications.

Universal Request for HR Service Delivery

With the integration of HR Service Delivery and Universal Request applications, you can provide a consistent user experience for employees while creating service requests. You can hide the complexities of inter-department request transfers and multi-department use cases by providing a common help desk for all employees.

About Universal Request for HR Service Delivery

A universal request gets created when an employee clicks the **Request help** option in Employee Center. A universal request routing agent analyses the issue (as HR department related) and creates an HR case from that universal request. After the case gets resolved by an HR agent, the

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state of the HR case changes to **Awaiting Acceptance**. Automatically, the state of the universal request changes to **Awaiting response**. Finally, after the employee accepts the resolution, the universal request gets closed and in turn the HR case gets closed.

At any point in time, the HR agent can transfer the HR case back to the universal request queue with or without resolution.

All the important details, such as, users who are working on the issue, inter-department transfers, and work notes, are recorded in the universal request ticket, providing complete visibility to the employee who has raised the request.

Activating the necessary plugins

After you have activated the Universal Request (com.snc.universal_request), Human Resources Scoped App: Core (com.sn_hr_core), and Employee Center (com.sn_hr_service_portal) plugins, you notice that:

- The Universal Request form contains a UI action to create an HR case.
- The **Universal Request** field appears on the HR case form when an HR case is associated with a universal request record.
- The **Transfer** button appears on the HR case form to let an HR agent transfer an HR case back to Universal Request, another department, or service.
- An HR case created from a record producer automatically creates a universal request. It happens only when the **Create Universal Request** check box is enabled on the record producer.

  Similarly in the Create a test case topic block, if the **Create Universal Request**check box is enabled on the record producer, then a universal request ticket is created and shared with the employee on the Virtual Agent conversation.

- When an HR case associated to a universal request goes through a state change, a notification is sent to the employee (requester) with the universal request number and not the HR case number.
- On ServiceNow AI Platform, HR cases that are associated with Universal Request appear under **HR Case Management** > **All**.
- On Employee Center, HR requests that are associated with Universal Request appear under **Employee Center** > **Requests**.

Custom configurations in Universal Request

Transferring and state mappings are preconfigured for all the base system HR states. Do these configurations only when you have a custom state.

Before you begin

Role required: sn_hr_core.admin

About this task

If you have created COEs (Center of Excellence), then create service configurations, state mappings, and transfer configurations as well. In case you have activated the Predictive Intelligence plugin, configure the service assignment groups by referring to Train the classification solution to predict the assignment group.

Procedure

1. Navigate to **All** > **Universal Request** > **Administration**.
2. Create your service set and services for Universal Request.

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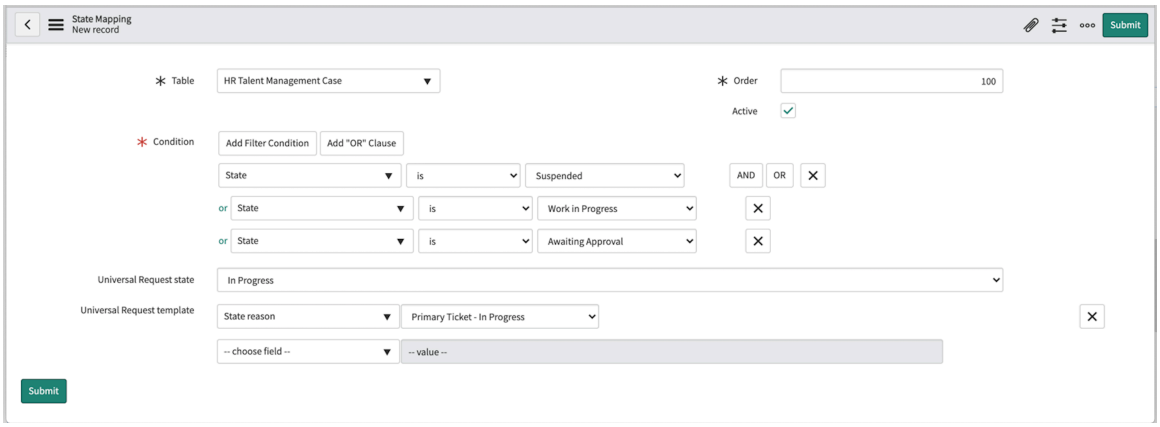
3. Assign the assignment groups for service sets and services.
4. Assign roles to UR users.
5. Map a custom state to that of a universal request.
   The following image is an example of a default state mapping. The **Suspended**, **Work in Progress**, and **Awaiting Approval** states of an HR case are mapped to **In Progress** state of a Universal Request.



6. Set the transfer configuration for any custom state of an HR case.

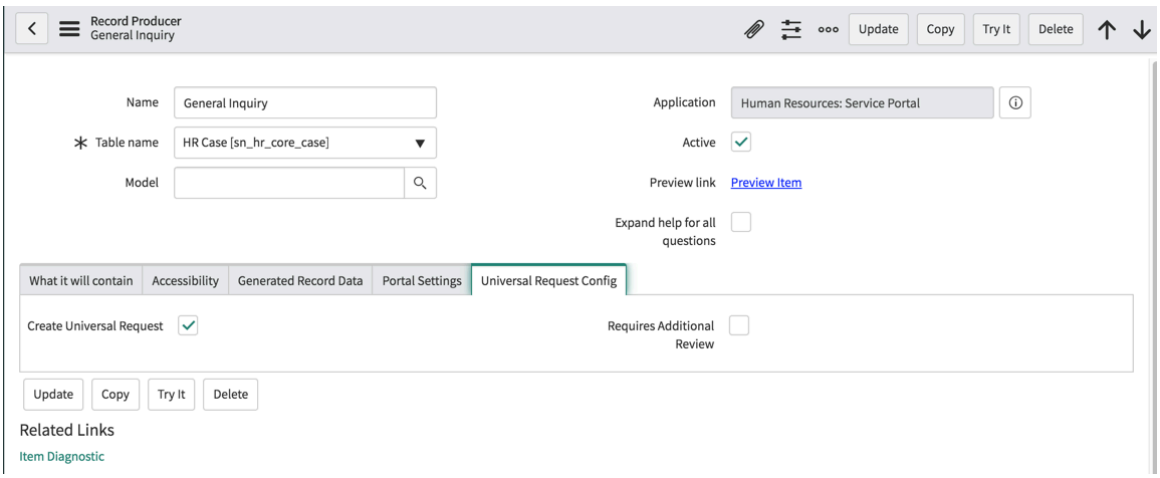
   This transfer configuration allows you to determine what happens to the departmental ticket when the request is transferred to another department or back to UR.

   If an HR case is being transferred with resolution, the state of the HR case automatically changes to **Awaiting Acceptance**. If an HR case is being transferred without a resolution, the state of the HR case automatically changes to **Closed Incomplete**.

7. Create record producers specific to an HR service.

   A record producer is a specific type of catalog item that allows end users to create task-based records from the service catalog. On the record producer, if you select the **Create Universal Request** check box, an HR case created from that record producer automatically creates a universal request record.

   Following is an example of a record producer for General Inquiry HR service. When a user selects the catalog item as General Inquiry and creates a ticket, automatically a universal request is created and associated to that HR case.



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Create an HR case from Universal Request

Restore service to a customer as soon as possible. After creating the HR case, you can investigate potential solutions.

Before you begin

- Role required: routing_agent and sn_hr_core.case_writer
- Activate the Universal Request (com.snc.universal_request) and Human Resources Scoped App: Core (com.sn_hr_core) plugins.

Procedure

1. Navigate to **Universal Requests** > **All**.
2. Open the universal request record from which you want to create an HR case.
3. Click **Create HR case**.
4. Fill in the fields on the HR case form.

   Note: The **Employee Information** field values are automatically copied from the universal request to the HR case.

   HR case form

Field	Description
COE	The Center of Excellence
HR service	The HR service type
Opened for	The person the ticket is opened for
Subject person	The subject person
Work notes	Other notes if any

5. Click **Submit**.
   The universal request number from which the HR case is created appears in the**Universal Request** field on the HR case form. The HR case number appears in the **Primary Ticket** field on the universal request form and also under the **Associated Tickets** related list.

Work on an HR case of Universal Request

Provide resolution to an HR case that is initiated from a universal request.

Before you begin

Role required: sn_hr_core.case_writer

About this task

The state changes described in the procedure can be configured to suit your requirements. For more information, see Universal Request state mapping

Procedure

1. Open the HR case that is created from a Universal Request.
2. Click **Start Work**.
   The state of the case changes to **Work in Progress**.

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Note:

- If another department in HR must work on the request, you can transfer the case with the same number or with a new number. When you transfer the case with a new number, the universal request gets associated to that new case number.
- If this issue is not related to the HR department, the HR agent must select the **Transfer** option on the case. For more details on how to transfer the case, see Transfer an HR case in Universal Request.

3. Click **Closed Complete** when the resolution is provided.
   The state of the HR case is changed to **Awaiting acceptance** and the state of the universal request is automatically changed to **Awaiting response from user**. On the Employee Center:
   - If the user accepts the resolution, the state of the universal request is changed to **Closed**. The state of the HR case is automatically changed to **Closed Complete**.
   - If the user rejects the resolution, the state of the universal request is changed to **In progress**. The state of the HR case is automatically changed to **Work in progress.**

Important: If for any reason the HR agent clicks **Closed Incomplete** without routing the HR case back to universal request, then the behavior is as follows:

- If the **Needs Additional Review** check box is selected on the universal request, the universal request will be in the **In progress** state, and the HR case will be in the **Close Incomplete** state.
- If the **Needs Additional Review** check box is deselected on the universal request, the universal request gets closed based on the state mapping.

Transfer an HR case in Universal Request

Transfer an HR case back to the Universal Request, or to another department or service with or without resolution.

Before you begin

Role required: sn_hr_core.case_writer

About this task

Configure the *sn_uni_req.transfer_type* property in the Universal Request properties page to determine how to handle the primary ticket transfers. For more information, see Universal Request Properties.

Procedure

1. Open the HR case that you want to transfer.
2. Click **Transfer**.

Note: The **Transfer** option is displayed only if you are a part of the assignment group or if the case is assigned to you.

3. In the **Transfer Ticket** dialog box, provide the following details.

Note: Based on your transfer type configuration, the given fields are displayed. For more information, see Universal Request properties.

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- **Action**: Select if the case should be transferred to another department or back to Universal Request
- **Department**: Select the department from the list.
- **Service**: Select the specific service of the chosen department.
- **Transfer reason**: Select the reason from the list.
- **Transfer notes**: A brief description for routing the primary ticket that you want to pass to the UR Routing agent.
- **Copy additional comments and attachments**: Deselect if you do not want to transfer the ticket with additional comments and attachments. By default, all attachments and comments are transferred.

Note: Work notes are not copied while transferring.

4. Click **Transfer**.

Result

- On the HR case form, you can view the reason for transferring in the **Transfer reason** field.
- The state of the HR case is changed to **Awaiting Acceptance** or **Closed Incomplete based on transfer reason** and the transfer reason and transfer notes are copied to the universal request.
- The state of the universal request remains **In progress**.

Note: The state changes mentioned can be configured. See Transfer configuration for more information.

Creating a universal request from an HR case

Create a universal request for every HR case that is created, using any channel. Extend the unified ticket experience that Universal Request provides for all the HR cases, irrespective of the channels they are created from.

Activate a business rule

To auto-create a universal request from an HR case, you must activate the **Create Universal Request for HR case** business rule.

Configure field mappings

To auto-create a universal request from an HR case and copy the primary details from an HR case to a universal request, Configure field mappings.

Configure field mappings

Map fields to copy the primary details from an HR case to a universal request (that is auto-created from the HR case).

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Mapping Configuration**.
2. Select an HR service.

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3. In the **Create UR mappings** related list, map the fields of an HR case with that of a universal request.

Field mappings

Source Field in HR case	Target Field in universal request
short_description	short_description
opened_for	opened_for
description	description
opened_by	opened_by

Create associated tickets from an HR case

From an HR case that is the primary ticket of a universal request, create tickets for another department and associate them to the same universal request as the HR case. This feature enables agents from various departments to collaborate and work on their tickets in parallel. It also enables organizations to trace back efforts against a single universal request.

Before you begin

Role required: sn_hr_core.case_writer
Logged in user is the member of the **Assignment group** or **Assigned to** fields.

Procedure

1. Open an HR case.
2. Click **Create Associated Ticket**.
3. In the **Create Associated Ticket** dialog box, provide the following details:

Form fields for creating an associated ticket

Field	Description
Department	Department for which you want to create a ticket.
Short description	Purpose of creating the ticket.
Description	More details pertaining to the ticket.
Work notes	Updates that you want to share with the department for which you are creating the ticket.

4. Click **Create**.
   A ticket is created for another department. This ticket is automatically tied to a universal request and appears in the **Associated Tickets** related list in a universal request.

AI Search for HR Service Delivery

The ServiceNow® AI Search application provides a modern consumer-grade search engine for the ServiceNow® Service Portal, Employee Center (EC), ServiceNow® Mobile, and ServiceNow® Virtual Agent.

New customers automatically have the ServiceNow® AI Search application configured with their base system for the EC only.

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If you are an existing customer, you can configure HR Service Delivery to use the ServiceNow® AI Search application.

For more information, see AI Search.

Configuration

For detailed information on configuring the ServiceNow® AI Search application, see Configuring AI Search.

Use the **Search Application Configuration** form to associate the AI Search engine with an HR Service Delivery application.

Note: For more information, see Create a search application configuration for AI Search.

In the **Search Application Configuration** form, you must also choose a **Search Profile**. The search profile determines the search sources and conditions for people, articles, and services.

The base system provides the following that you can also modify:

- Mobile: NowMobile Default Search Profile
- EC: EC Portal Default Search Profile
- Service Portal: Service Portal Default Search Profile
- VA: Service Portal Default Search Profile

Note: For mobile, people search is only available to customers that have the EC.

Under the search profile, there are a series of tabs that enhance AI search. The base system provides the following that you can also modify:

- Search Sources
- Synonyms
- Stop Words
- Typo Handling
- Genius Results
- Result Improvement Rules

Note: For more information, see Defining search profiles.

Integration

For detailed information on integrating AI Search with HR Service Delivery, see Integrating AI Search into your application.

Administration

Learn how the AI Search features and behavior affect indexing and search. For more information, see Administering AI Search.

Using

See how AI Search displays results, how to use refinement filter options, and Genius Result answers. For more information, see Using AI Search.

ServiceNow® Mobile

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Configure AI Search for the ServiceNow® Mobile. For more information, see Advanced text search in mobile.

Service Portal or Employee Center

Configure AI Search for the Service Portal or Employee Center (EC) so your users can take advantage of this powerful search tool. For more information, see AI Search in Service Portal.

Virtual Agent

Virtual Agent uses AI Search to return search results in bot conversations when there are no relevant topics to display. For more information, see Virtual Agent integration with AI Search.

Virtual Agent for HR Service Delivery

HR Service Delivery and Virtual Agent provide an automated chat with an employee requesting HR services. You can program Virtual Agent to understand the intent of an employee to handle repeatable requests.

Virtual Agent enhances the employee experience by addressing queries immediately.

At any time during a virtual chat, the employee can request to interact with a live HR agent.

For more information, see Virtual Agent.

Predefined Virtual Agent topics for HR Service Delivery

The base system provides the predefined Virtual Agent topics (chatbot conversations) designed to help your customers complete common self-service HR tasks. These topics are not published and found under the Virtual Agent Designer. For more information, see Virtual Agent Designer.

For more information on predefined virtual agent topics, see Prebuilt Virtual Agent topics, topic blocks, and ServiceNow NLU models.

The following predefined, HR Service Delivery Virtual Agent topics are available:

- Add Emergency Contact (Template)
- Ask a Question (Template)
- Benefits Overview (Template)
- Create HR General Inquiry Case (Template)
- Delete Emergency Contact (Template)
- FAQ Search Fallback Topic (Template)
- General HR Inquiry (Deprecated)
- New Hire Orientation (Template)
- Pay Discrepancy (Template)
- Request for Leave (Template)
- Update Address (Template)
- Update Email (Template)
- Update Emergency Contact (Template)
- Update Phone Number (Template)
- Download Payslip Request (Template)

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- Enroll new Beneficiary Request (Template)
- Change in Benefits Inquiry (Template)
- Tuition Reimbursement Request (Template)
- HR Account Access (Template)
- Employment Verification Letter Request (Template)
- 401k Benefits inquiry (Template)
- HSA Inquiry (Template)
- Check Case status (Template)
- Employee Info Update (Template)

Note: Employee info update topic enables you to update information like Email, Address and Phone number, at one place instead of going to the individual topics separately.

Warning: General HR Inquiry is no longer available as one of the predefined topics.

A topic defines the dialog between the Virtual Agent (chat support bot) and user to accomplish a specific goal. The information exchanged during the conversation flow (user inputs and bot responses) enables the chatbot to fulfill a user request or assist a user in completing a task.

For more information, see Designing a Virtual Agent topic.

Custom portals and ticket page

If your company has created a custom portal and/or ticket page, and you want the HR case link (in Virtual Agent) to redirect to your portal and/or ticket page, then create a system property that links the HR case in Virtual Agent to your portal and/or ticket page. For example:

- Custom portal name: escServiceNow
- Custom ticket page name: new_ticket_page
- sys_property: com.glide.cs.portal_url_mapping.escServiceNow.sn_hr_core_case
- Value: /escServiceNow?id= new_ticket_page&sys_id={{data.sys_id}}
- Application: Global

Note: See Add a system property.

Natural Language Understanding (NLU) support

You can set up HR Service Delivery Virtual Agent to use Natural Language Understanding (NLU) to understand word meanings and word contexts to infer user or system actions.

For more information about NLU and the NLU Workbench, see Natural Language Understanding and Activate the NLU Workbench.

Also, see Natural Language Understanding in Virtual Agent.

Note: This feature is only available with the HR Professional and HR Enterprise packages.

Reusable HR Service Delivery Virtual Agent topic blocks

Create and reuse topic blocks to perform common functions in HR Service Delivery Virtual Agent conversations, like creating an HR case or performing a search.

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Topic blocks help you be more productive by minimizing duplicate subflows, are easier to maintain, and ready to use immediately.

The following predefined, reusable topic blocks are:

- Contextual Search
- Create HR Case
- Survey
- Transfer to Live Agent
- Update HR Case
- Employee Authentication
- Agent Availability
- FAQ Contextual Search
- AI Search
- Request Catalog Item
- Search Catalog Item
- Pause

The Topics page in Virtual Agent Designer features a sort tab called **Topic Blocks** for viewing just the reusable topic functions. For detailed information about HR Service Delivery Virtual Agent, refer to Prebuilt Virtual Agent topics, topic blocks, and ServiceNow NLU models.

Integration with messaging applications

Your employees can hold Virtual Agent conversations using Slack, a third-party messaging application.

For more information, see Virtual Agent integration with messaging apps.

For information on configuring Virtual Agent notifications for certain channels such as Slack, see Setting up Virtual Agent notifications.

Topic Recommendations for HR Service Delivery Virtual Agent

Get pre-built topics or create new topics from the recommended topics for HR Service Delivery Virtual Agent using the default configuration sn_hr_core_case in the Topic Recommendations settings. For more information, see Topic Recommendations settings.

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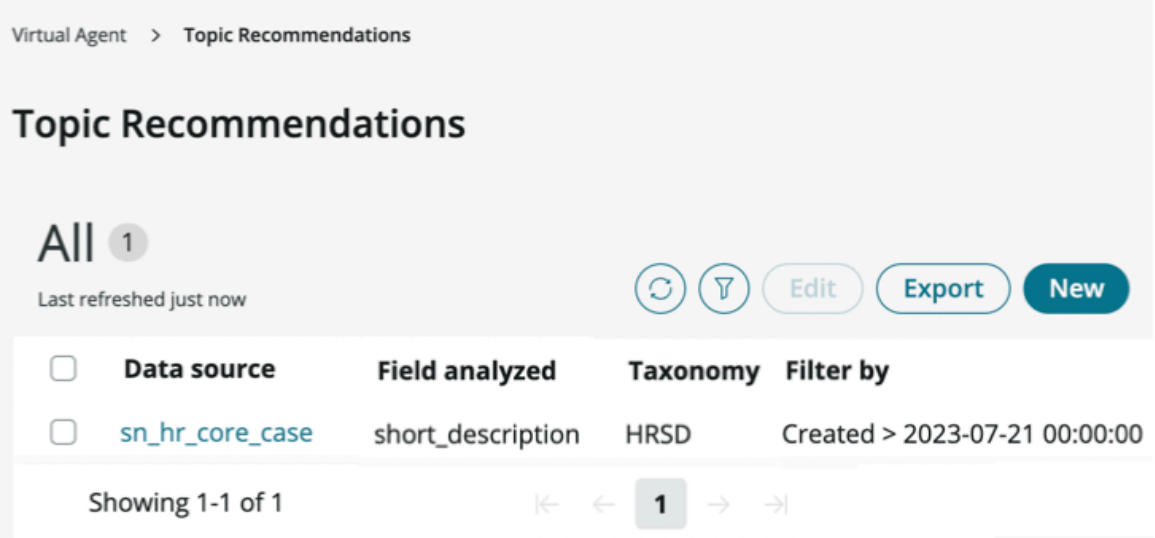

For HR Cases, this default setting is shipped with Taxonomy preselected to HRSD and the Filtered by setting set to display the cases created after the last 90 days. For more information on Topic Recommendations, see Using Virtual Agent Topic Recommendations.

In the Topic Recommendations page, under Get new recommendations, select **HR Cases** and click on **Get new recommendations**. Once the new recommendations are available, select your preferred recommendations and add them to the Virtual Agent using the **Add to VA** option. For more information, see Topic Recommendations page.

Note: The system takes around 15 minutes to provide the new topic recommendations.

Note:

- To get the Topic Recommendations, accept the RCAs after installing the HR Service Delivery Virtual Agent plugin.
- To add a recommended topic to the Virtual Agent, you must be present in the HR Service Delivery Virtual Agent scope.
- To get Topic Recommendations, make sure there are a minimum of 10,000 records and a maximum of 300,000 records in the HR Cases table.

Activate Virtual Agent for HR Service Delivery

Activate Virtual Agent for HR Service Delivery to provide user assistance through a conversational messaging interface. You can also activate Virtual Agent for HR Service Delivery with ServiceNow® Natural Language Understanding (NLU).

Before you begin

Role required: admin

About this task

The HR Service Delivery Virtual Agent Conversations plugin (sn_hr_va) activates the *sn_hr_va.min_admin_count* system property in the System Properties [sys_properties.list] table. This property prevents you from deleting your only Virtual Agent admin user by requiring a minimum number of active users with this role. The minimum is two by default.

To activate Virtual Agent, do the following in order:

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1. Activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) that provides the Virtual Agent framework.
2. Activate the Human Resources Scoped App: Core plugin (com.sn_hr_core) that provides case and knowledge management for HR.
3. Activate the HR Service Delivery Virtual Agent Conversations plugin (sn_hr_va) that provides a conversational bot platform for user assistance.

If you want to activate Virtual Agent also with NLU, then activate the following plugins after you have already activated the previous plugins:

1. Activate the Predictive Intelligence plugin (com.glide.platform_ml) that enables the creation of machine learning solutions.
2. Activate the NLU Workbench plugin (com.snc.nlu_studio) that enables the creation of NLU models.
3. Activate the Studio plugin (com.glide.dev-studio) that is used for adding and updating application files.
4. Activate the HR Service Delivery NLU Model for Virtual Agent Conversations plugin (sn_hr_nlu) that provides the NLU model used by HR Virtual Agent. This plugin is available on the ServiceNow Store, and provides NLU models in the English, German, French, Spanish, Japanese, Dutch, Chinese, and Brazilian Portuguese languages.

Note: The HR Service Delivery NLU Models in the Dutch, Chinese and Brazilian Portuguese languages do not support entity extraction (intent matching and entity recognition).

When an employee opens an HR case using Virtual Agent for HR Service Delivery, the **Source** field on the HR case is **Virtual Agent**. For more information, see Work an HR case.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Set up Virtual Agent for HR

Setting up Virtual Agent or Virtual Agent with NLU for HR Service Delivery requires multiple steps.

Before you begin

Role required: admin, virtual_agent_admin
The base system provides predefined Virtual Agent and Virtual Agent NLU topics (chatbot conversations).

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Note: You cannot edit the provided topics. You can duplicate a provided topic and then edit it. You can also create additional topics. See Virtual Agent Designer.

After performing the activation steps, the **Chat** link replaces the **Chat with HR** link on the Employee Center or service portal.

When an employee clicks the **Chat** link, Virtual Agent launches and the employee is chatting with a virtual agent.

Before your employees can use Virtual Agent topics, you must activate and publish them.

Before existing Virtual Agent topics can use NLU, you must republish them.

Note: By default, the base system provides topics as inactive and unpublished.

If your company uses a custom service portal and ticket page, see Virtual Agent for HR Service Delivery.

To view, duplicate, preview, or publish HR topics in the Virtual Agent Designer:

Procedure

1. Navigate to **All** > **Collaboration** > **Virtual Agent** > **Designer**.
2. Click **Active** so the button turns green to activate a topic.
3. Click **Publish**.
4. Click **Save**.

Configure a custom HR Service Delivery greeting experience

Define a custom HR Service Delivery greeting experience for a specific context in which your users run Virtual Agent. Configure your greeting experience to initiate the virtual agent automatically or immediately transfer to a live agent.

Before you begin

Prechat enables you to determine if you want the Virtual Agent topic conversation experience or a live agent experience. The Prechat is independent of the Glide Virtual Agent (com.glide.cs.chatbot) plugin activation.

For example, if your instance has both IT Service Management Pro and HR Service Delivery Pro subscriptions, you can implement Virtual Agent topic conversations when a chat starts for ITSM and Live Agent transfer when a chat starts for HR Service Delivery.

You can only customize the greeting experience for Virtual Agent setup topics. Customization of the setup topics is based on the condition that you define. The condition is based on context variables. The customizable setup topics include:

Customizations for setting up topics

Setup topic type	Setup topic
Anything else	N/A
Live Agent	Live Agent Support
Error	Error Handling Topic
Greeting	Greetings
Closing	Closing Conversation

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Customizations for setting up topics (continued)

Setup topic type	Setup topic
Survey	N/A
AI Search fallback	AI Search Fallback
Fallback	Fallback Topic
Explore Help	Virtual Agent Capabilities

Role required: virtual_agent_admin or admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Settings**.
2. Select Virtual Agent.
3. In Custom Greetings and Setup, select **View all**.
4. Select **New**.
5. On the Custom Greetings and Setup form, fill in the fields.
   For field descriptions and more details, see Configure a Virtual Agent chat experience.

   Note: Define the custom experience in the **Provide the context** section of the Custom Greetings and Setup record. Configure the **Condition Mode** field to **Advanced** and customize the condition logic in the **Script** field with JavaScript that specifies the context.

6. Select **Create custom experience**.

Result

You have created a custom greeting experience for HR Service Delivery users.

Note: A custom greeting and chat experience HR ESC Experience is available to the HR Service Delivery Virtual Agent users to cater to HR Service Delivery specific search experience. This experience is inactive by default, you have to activate it for your users.

Capturing solution delivery in HR Service Delivery Virtual Agent chats

HR Service Delivery Virtual Agent provides pre-built patterns that enable you to track whether Virtual Agent conversations helped the end user.

Deflection outcomes indicate whether Virtual Agent chats provided a solution to the user. You can define deflection points in a Virtual Agent topic that can be mapped to a deflection pattern to capture the right deflection.

For HR Service Delivery Virtual Agent users, six deflection patterns are available by default. They are divided into three deflection outcomes:

- Confirmed deflection - Provides a resolution to the user that prevents the user from creating an HR case or transferring to a live agent. For example, Virtual Agent might add a user to the distribution list.
- Potential deflection - Provides a partial resolution to the user. For example, information the user is looking for is provided or search results are returned.
- No deflection - Did not provide a solution or the user created a general inquiry case.

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HR Service Delivery Virtual Agent Deflection patterns

Deflection patterns	Activity	Deflection outcomes
HR VA Search-Served	Knowledge base article served and helped	Confirmed deflection
HR VA Self-Resolving	Information updated	Confirmed deflection
HR VA Triage&Created	HR service case created	Potential deflection
HR VA Info-Found	Information found	Potential deflection
HR VA Service Case Not Created	HR general inquiry case created	No deflection
HR VA Info-Not-Found	Information not found	No deflection

If the user interacts with a Virtual Agent topic that has deflection defined, the deflection data is captured automatically in the background without changing the user experience. This deflection outcome of matched patterns is then recorded for analysis. You can access this information by navigating to **All** > **Self-Service Analytics** > **Deflection Metric**.

Note: The default deflection patterns in the HR Service Delivery Virtual Agent are not customizable. To modify a deflection pattern, you have to clone it, make the necessary changes, activate it and then publish the pattern.

Performance Analytics for HR Service Delivery

HR Performance Analytics measures key performance indicators to track HR performance over time.

Activation information

HR Performance Analytics Scoped requires a separate premium subscription to the Performance Analytics application. Activate the:

Performance Analytics Premium for Human Resources Management [com.snc.pa.premium.hr] plugin.

Also, activate one or more of the following content packs:

- Performance Analytics - Content Pack - Human Resources Scoped App [com.sn_hr_pa]
- Performance Analytics - Content Pack - Human Resources Employee Document Management Scoped App [com.sn_hr_employee_files_pa]

To configure the Performance Analytics (PA) dashboard, assign the Performance Analytics Administrator [pa_admin] role to the HR Administrator [sn_hr_core.admin] role.

Note: Only the System Administrator [admin] can assign PA roles to employees.

See Performance Analytics roles.

Contact your account manager for more information.

Related topics

Performance Analytics

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Viewing HR Performance Analytics Scoped

HR Performance Analytics for the scoped version of HR Service Delivery helps you align resources and systems to strategic objectives.

Before you can view HR Performance Analytics data, your organization must purchase a subscription to Performance Analytics and an administrator activates the plugin.

After activating HR Performance Analytics, the collection job runs daily by default and is configurable. Collected data is kept for 30 days. The data in performance analytics reports is collected based on a daily scheduled job, therefore, the date is one day in the past. Over time, more data is available for historical trending.

Scheduled Data Collection

There are two jobs specific to the Performance Analytics - Content Pack - Human Resources Scoped App [com.sn_hr_pa] plugin:

- [PA HR Case] Daily Data Collection
- [PA HR Case] Historic Data Collection

See Create or schedule a data collection job.

Indicators

Each job has indicators to make data collection efficient and defines what data to collect.

See Configure a job indicator.

View dashboards

After the PA jobs run, you can view the collected data from the **Dashboard**.

See Dashboards overview.

HR Manager

Provides detailed data about open cases that helps managers quickly assign agents and look deeper into opened cases. You can sort this dashboard by assignment group.

- You can only filter this dashboard by Groups.
- The **Overview** tab provides summaries by backlog of all open cases, average time to resolution, and unassigned opened cases.
- The **Operational** tab shows the number of open cases by backlog, critical, breached SL, not updated in the last 10 days, and unassigned open. You can also filter by priority, state, assigned to, topic category, and HR service.
- The **Backlog monitor** tab shows the number of all open cases, average reassignment, cases not updated in last 3 days, unassigned, and the average age of open cases. You can also sort by COE, topic category, HR service, assignment group, agent, state, source, or priority and further by type of HR case. The format of the data is interchangeable.

HR Agent

Provides detailed data for the logged in HR agent. It provides the number of backlog of open cases, breached SLA cases, approval requests, and unassigned cases.

Group and stack the opened backlog cases by priority or state .

You can filter by state, topic category, source, and priority.

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The **Performance Analytics** dashboard provides the following reports.

Volume of Open/Closed Cases by Category

The line chart shows the trend of open and closed cases for each of the last four weeks. Click a point on a line to see open or closed cases for the duration. The **Breakdowns** tab shows the number of open or closed cases by category. Select **Stacked bar** from the choice list for the best data format.

Active HR Cases per Week - by AVG

The bar chart shows the average number of active cases by state for each of the last four weeks. It also shows the total number of cases for each week. The **Breakdowns** tab shows the aging buckets and the total number of cases in each bucket.

Active HR Cases by State

The trending chart shows a trend of the cases that moved to each HR case state during the past 30 days. The gray bar to the left of the Trend column represents the proportion of moved cases to the total number of cases. The **Breakdowns** tab shows aging buckets and the number of cases in each bucket for that date.

Active HR Cases Managed by Agent - Weekly AVG

The trending chart shows the number of cases assigned to each agent over the past four weeks.

Active HR Cases SLA Indicator per Week- By AVG

The bar chart shows the average number of cases that were in each aging bucket for each of the last four weeks. The **Breakdown** tab shows the agent and the number of cases on that date in the selected aging bucket. Select **Column** from the choice list for the best data format.

1. Point your cursor to an element, such as a bar or pie segment, to see what the element represents.
2. Click a segment to see more details about the element. Scroll up to view the information. The detail contains the following tabs, depending on the selected element.

- **Chart**: The detail of the element displayed in a chart. You can use the controls on the upper right to add or change comments, targets, and thresholds.
- **Breakdowns**: The breakdown of the buckets used in the report. Select a chart type from the choice list on the upper right to see the data in another format.
- Records: The records that comprise the element you selected. You can view the detail of each record.
- Scores: The number of records for each week in the report.
- Comments: Comments entered for this report. The tab is disabled unless comments exist.
- More info: A description of the logic that generates the report, how often the job runs, and when the data was last collected.
- If a menu icon appears when you point your cursor to a chart, you can click the icon to export the chart to an image file.

For more information about performance analytics and how to develop and modify widgets for your organization, see Performance Analytics concepts .

HR Performance Analytics Dashboards

Platform Analytics Solutions contain preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

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Platform Analytics data visualizations use Performance Analytics indicator data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

To enable the solution plugin, an admin can navigate to **System Definitions** > **Plugins** and activate the Performance Analytics - Content Pack - Human Resources Scoped App and the Performance Analytics - Content Pack - Human Resources Lifecycle Events Scoped App plugins.

Add Self-Service Analytics to your Human Resources dashboards

If you have Self-Service Analytics activated on an instance, you can add Self-Service analytics widgets to your Performance Analytics dashboards or a Service Portal. To obtain a ready-made set of indicators and breakdowns, activate the Self-Service Analytics PA (`com.snc.pa.self_service_analytics`) plugin. Find the Self-Service indicators through the Performance Analytics Admin Console, then create widgets and add them to your dashboard or portal. Also activate the [SSA] Self-Service Analytics data collection job.

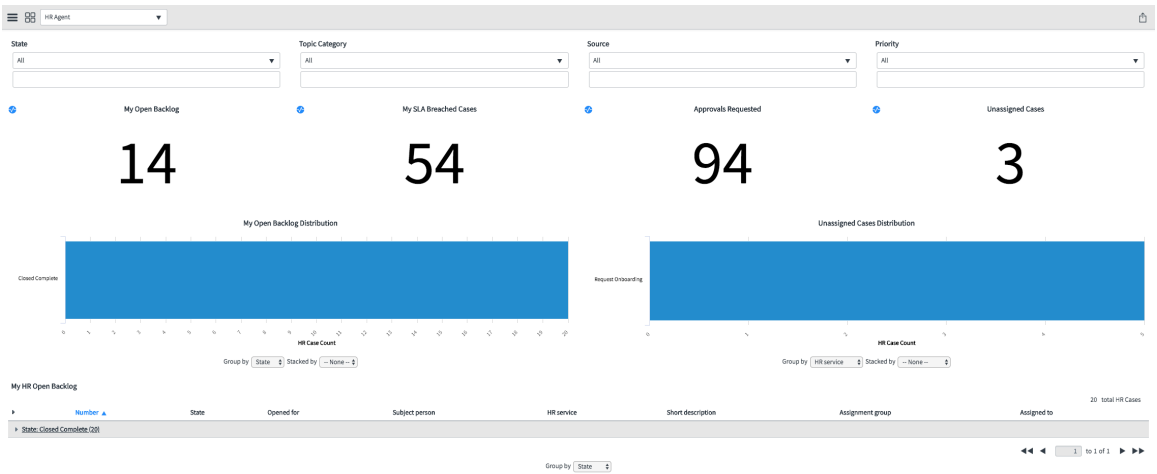
Related topics

Activate your Performance Analytics subscription

Human Resources agent dashboard

The dashboard for HR Agents monitors caseloads to help stay on top of the backlog, enabling the HR Agent to provide a streamlined experience for the organization workforce.

Note: This dashboard is available in the Human Resources Scoped App content pack.



End users and roles

End user and goal	Required role	Benefits
HR Agent: Agents need to monitor their cases and measure their performance to stay on top of the backlog.	sn_hr_core.basic, sn_hr_core.case_writer	The HR Agent can provide a streamlined experience for the organization workforce.

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Use case

Organizations need to understand and meet or exceed the expectations of the modern workforce and provide a delightful employee experience. Using this dashboard, the HR Agent can track the progress of the cases they own, sorted by priority.

Data visualizations

The Human Resources Agent dashboard contains the following visualizations:

Title	Type
Approvals Requested	Single Score
My HR Open Backlog	List
My Open Backlog	Single Score
My Open Backlog Distribution	Horizontal bar
My SLA Breached Cases	Single Score
Unassigned Cases	Single Score
Unassigned Cases Distribution	Horizontal bar

Human Resources manager dashboard

The dashboard for HR Managers provides insights on how HR teams are meeting expectations. The HR Manager can measure and improve the influence of their team on meeting and exceeding workforce expectations.

Note: This dashboard is available in the Human Resources Scoped App content pack.

Overview tab

Operational tab

Backlog monitor tab

End users and roles

End user and goal	Required role
HR Manager: Needs clear visibility into the operations of the shared service center.	sn_hr_core.manager

Use case

Organizations need to understand and meet or exceed the expectations of the modern workforce and provide a delightful employee experience. This dashboard provides the HR manager with an overview of the number of HR cases and the time and difficulty in resolving them.

Indicators

The HR Manager dashboard presents the following key performance indicators:

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Average case survey score

Measures the average score of the customer satisfaction survey that is sent to the employees after a case is closed. The score should maximize over time.

The **CSAT** widget on the dashboard presents an average over the last seven days of the average case survey score.

HR Cases Growth

Measures the change in volume of your case backlog. This value is calculated from other indicators using the formula `Number of open cases - Number of closed HR cases`.

Number of open cases with breached SLAs

Measures the number of open cases that have SLAs greater than 100.

Average age of open cases

Measures the average time that a case remains open. This value is calculated from other indicators using the formula `Summed duration of open cases / Number of open cases / 24`.

On the dashboard, this indicator is labeled **Open Cases Age**.

Average age of closed cases

Measures the average amount of time that it takes to close a case. This value is calculated from other indicators using the formula `Summed duration of open cases / Number of open cases / 24`.

The **Average time to close - Weekly** widget presents an average over the last seven days of the average age of closed cases.

Number of open cases

Measures the number of cases that were opened on or before today that have not been closed yet.

The number of open cases is plotted against the age of open cases.

Average reassignment of open cases

Measures the average number of times a case is reassigned. This value is calculated from other indicators using the formula `Summed reassignment of open cases / Number of open cases`.

Number of cases with no updates in last 3 days

Number of cases with no updates in last 10 days

The number of open cases that have gone 3 or 10 days, respectively, without any updates.

Summed duration of open cases

Measures how long all open cases have been open for.

Number of reassigned open cases

Measures the number of cases that have a reassignment count greater than 0.

Summed reassignment of open cases

Measures how many times a case is reassigned.

Number of unassigned open cases

Measures number of open cases that are yet to be assigned.

Number of closed HR cases

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Measures the number of cases that were closed today.

Summed duration of closed cases

Measures the time taken to close all cases.

Number of new cases

Measures the number of cases that were opened today.

Breakdowns

- Age
- Agent
- Assignment Group
- COE
- HR Service
- Priority
- Source
- State
- Topic Category

Data visualizations

The Human Resources Manager dashboard contains the following visualizations:

Title	Type
# Breached SLA	Single Score
# Critical Cases	Single Score
# Not updated last 10 days	Single Score
# Unassigned Open Cases	Single Score
Approvals Requested	Single Score
Open Backlog	Single Score
Open Backlog by State	List
Open Backlog by State	Horizontal bar
Open Cases Distribution	Heatmap
Time Spent in Each Group(last 6 months)	Multilevel Pivot
Unassigned Cases	Single Score

HR Onboarding Executive dashboard

This dashboard gives Human Resources executives insights into how smoothly new employees progress through onboarding activities. Real-time information gives them all the insights they need to measure and improve the influence of their team on providing a delightful employee experience.

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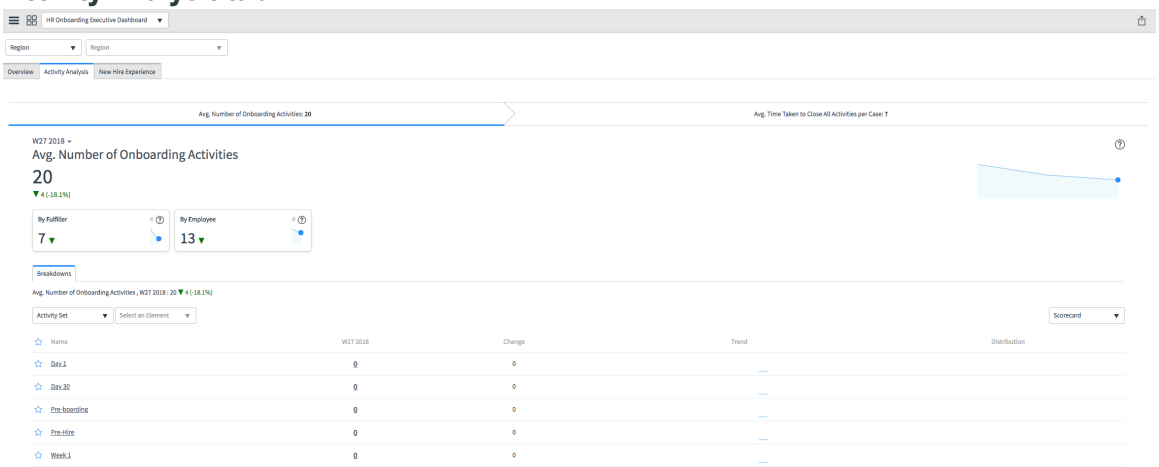
Note: Starting with the Australia release, HR onboarding executive dashboard is being prepared for future deprecation.

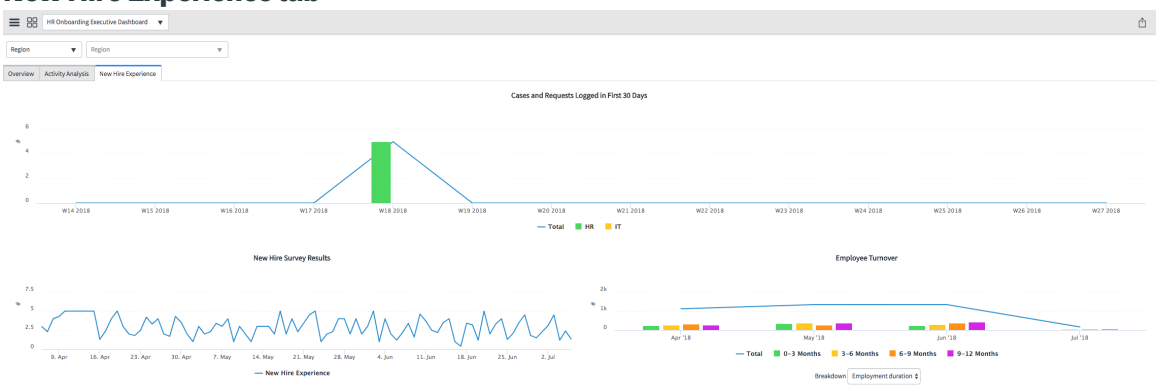
Overview tab



Activity Analysis tab



New Hire Experience tab



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End users and roles

End user and goal	Required Performance Analytics role
HR Executive: Needs clear visibility into employee experience	sn_hr_core.manager

HR Onboarding Executive indicators

Number of employees leaving the company

Measures employee attrition. The **Employee Turnover** widget displays this value, broken down by department, employment type, or employment duration.

Average number of onboarding activities per onboarding case

Measures how many activities are closed on average from the total number of closed onboarding cases, using the formula `[Number of Closed Onboarding Activities] / [Number of closed lifecycle events cases > HR Service = Request Onboarding]`

Average new hire satisfaction survey score

Measures the average score of the new hire satisfaction survey which is sent to the employees after they have onboarded

Average time taken for onboarding activities

Measures the time taken on an average to finish onboarding activities per onboarding case, using the formula `[Summed duration of onboarding activities] / [Number of closed lifecycle events cases > HR Service = Request Onboarding] / 24`

Number of HR Cases logged in first 30 days of employment

Measures the number of non-onboarding HR cases that were logged by employees during the first 30 days of their employment

Average number of onboarding activities per onboarding case - Fulfiller

Measures how many activities assigned to the fulfiller are closed on average from the total number of closed onboarding cases, using the formula `[Number of closed onboarding activities - Fulfiller] / [Number of closed lifecycle events cases > HR Service = Request Onboarding]`

Average number of onboarding activities per onboarding case - Employee

Measures how many activities assigned to the employee are closed on average from the total number of closed onboarding cases, using the formula `[Number of closed onboarding activities - Employee] / [Number of closed lifecycle events cases > HR Service = Request Onboarding]`

Average time taken for onboarding activities - Employee

Measures the time employees take on average to finish their onboarding activities as part of onboarding case, using the formula `[Summed duration of onboarding activities - Employee] / [Number of closed lifecycle events cases > HR Service = Request Onboarding] / 24`

Average time taken for onboarding activities - Fulfillers

Measures the time fulfillers take on average to finish their onboarding activities as part of onboarding case, using the formula `[Summed duration`

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`of onboarding activities - Fulfiller] / [Number of closed lifecycle events cases > HR Service = Request Onboarding] / 24`

Number of closed lifecycle events cases

Measures number of lifecycle events cases closed today

Number of closed onboarding activities

Measures the number of all activities closed as part of a lifecyle case, using the formula `[Number of closed onboarding activities - Employee] + [Number of closed onboarding activities - Fulfiller]`

Number of closed onboarding activities - Employee

Measures the number of closed activities assigned to the new hire

Number of closed onboarding activities - Fulfiller

Measures the number of closed activities assigned to the fulfiller

Number of IT Requests logged in first 30 days of employment

Measures the number of IT Requests that were logged by employees during the first 30 days of their employment

Number of new lifecycle events cases

Measures number of lifecycle events cases opened today

Number of open lifecycle events cases - Employees starting in next 7 days

Measures number of open cases for employees starting in the next 7 days

Number of open lifecycle events cases - Post day 1

Measures number of open cases for employees who have already started

Number of open lifecycle events cases - Pre day 1

Measures number of open cases for employees who have yet to start

Breakdowns

- Activity
- Activity Set
- Department
- Employment duration
- Employment Type
- Location
- Owner Group
- Region

Data visualizations

The dashboards include the following visualizations:

Title	Type
Overdue Activities - Employee	Single Score
Overdue Activities - Fulfiller	Single Score

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User Experience for HR Service Delivery

Usage Insights dashboard provides dashboard views for monitoring the key performance indicators (KPIs) of web applications built on the Employee Service Portal.

You can access the dashboard from Dashboard and Reporting. Monitor key performance indicators of the users experiences to create more intuitive user journeys. Click the respective session for a detailed analysis.

- Enable the analytics to view the number of users and their engagement rates over time.
- Analyze the analytics such as geographic, sessions, operating system, and more.
- Track user actions, see user flows, and understand user behavior.
- Gain visibility into the workflows and create more intuitive user journeys.

Dashboard overview

From dashboard, you can track the following employee sessions, page views, and actions. Navigate to **Usage Insights > Dashboard** for more information on the following modules and controls:

- Total active users
- Total sessions
- Page views
- Unique users
- Average session duration
- Retention
- Funnel completion
- Top events

To track the actions, you must enable the analytics first.

Enable Analytics

When you launch the application for the first time, you must enable the consent for tracking the user analytics. Based on your geographic location, your consent settings may change.

Event tracking

Track the following events, status, and progress of the following events. Navigate to **Usage Insights > Analytics > Events** for more information.

- To-do opened
- To-do completed
- My requests
- Relevant for you
- Successful login
- Tracking enabled
- Tracking disabled
- View knowledge article
- Successful submissions at survey response

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- Unsuccessful attempts at survey response
- Submit record producer request
- Submit catalog request
- Search

Employee To-dos

Track the employee to-dos, tasks, actions, short descriptions, and status from the sessions section. Navigate to **Usage Insights > Sessions > Timeline** for more information.

- To-do type
- To-do opened
- To-do completed

Relevant for you

Track the **Relevant for you** information from the sessions section. For example, you can see article title, page id, and more. Navigate to **Usage Insights > Dashboard > Sessions > Timeline** for more information.

My Requests

Track the progress of **My Request** information from the sessions section. For example, you can see **Action: Ask A Question**, **Action: Accept Resolution**, HR Case, HR Service, and more. Navigate to **Usage Insights > Dashboard > Sessions > Timeline** for more information.

Knowledge

See how employees use the progress of knowledge articles. Navigate to **Usage Insights > Analytics** for more information.

Analytics and reports

See the analytics about usage, technical, geographic, events, retention, and more. Navigate to **Usage Insights > Analytics** for more information. You can see the reports for various timelines such as daily, weekly, monthly.

Machine learning solutions for HR Service Delivery

Machine learning solutions for HR Service Delivery help in auto determining assignment groups and services for HR cases, auto creating cases from emails, and discovering knowledge articles that help in faster resolution of cases and tasks.

Demand Insights for HR Cases dashboard

The Demand Insights for HR cases dashboard enables you as an HR agent to identify which HR cases have no or insufficient knowledge coverage. You can then create feedback tasks for knowledge gaps to deflect such HR cases.

Auto-case creation from an email

Automatically categorize HR cases submitted by email. Auto-case creation allows for a faster response time and better case resolution for employees.

HR cases can be created via email, phone, or a self-service Service Portal such as the Employee Service Center. By default, an email sent to the general address for HR requests is created

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as a general inquiry case. An HR agent then has to review and manually recategorize it to the appropriate HR service. With Predictive Intelligence, a predictive model is auto-trained to categorize HR cases submitted by email. The email is routed to the appropriate HR service based on the subject line and body.

Note: This feature is available with the HR Professional and HR Enterprise packages when you activate the HR Service Delivery and Predictive Intelligence applications. If you do not want to use this feature navigate to **HR Administration** > **Application Properties** and disable the *Enable HR Case auto categorization* property.

On instances where both Predictive Intelligence and HR Service Delivery are active, the following solution definition and business rule are available to use.

Solution Definitions and Business Rules (Active)

Solution Definition	Description
HR Case Categorization	Predicts the **HR service** from the **Short description** and **Description**.

Business Rules and Tables (Active)

Business rule	Table	Description
Predict COE, Service after insert	HR Case [sn_hr_core_case]	Generates prediction results for active HR Service Delivery solutions. Runs when a new HR case record submitted by email is inserted.

By default, the solution definition is configured and the predictive model is auto-trained when the following conditions are met. Auto training happens based on the frequency configuration of solution definition.

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- There are 10000 records of HR case study matching the filters defined in the solution definition.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

When any one of the preceding conditions is not met, you must manually configure the solution definition and train the predictive model from the **HR AI configuration** module. If you use domain separation in your instance, you can define the solution definition to use for each domain by creating additional configuration records. See Configure the HR solution definition and domain for more information.

Once your solution definition is trained, you can test the solution prediction by sending emails to the general email address for HR requests. You can then verify that the corresponding HR cases are automatically categorized to the appropriate HR service. See Test an HR solution prediction for more information.

Configure the HR solution definition and domain

Configure your solution definition from the **HR AI configuration** module, as well as access the solution definition record for training. If you use domain separation in your instance, you can define the solution definition to use for each domain by creating additional configuration records.

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Before you begin
Role required: sn_hr_core.admin

Procedure
1. Navigate to **All** > **HR Administration** > **HR AI Configuration**.
2. Click **New** or open a record.
3. On the form, fill in the fields:

HR AI Configuration form

Field	Description
Solution Capability Definition	Name of the solution definition. ○ To create or select a solution definition, click the **Lookup** button. ○ To update or train a solution definition, click the **Preview** button to open the solution definition record. ○ For further information on creating and training a solution definition, see Create and train a solution definition.
Use case	Name of the use case. For example, email categorization or HR service categorization
Active	Check box to activate the HR AI configuration for use.

4. Click **Submit** or **Update**.

Test an HR solution prediction

Test the solution prediction by sending emails to the general email address for HR requests. Verify that the corresponding HR cases are automatically categorized to the appropriate HR service.

Before you begin
Role required: sn_hr_core.admin or sn_hr_core.case_reader

Procedure
1. Send an email to the general email address for HR requests.

   Note: To verify the general email address for HR requests, navigate to **HR Administration** > **Properties**, and view the **General email address for HR requests** property.

2. Navigate to **HR Case Management** > **All HR Cases**, and open one of the modules, such as **Assigned to me** or **Open**.
3. Open the applicable record.
4. Verify that the HR case was automatically categorized to the appropriate COE and HR service.

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What to do next

If you need to retrain and review your predictive model, see Create and train a solution definition and Review classification solution statistics.

Auto determination of HR service

Auto determine the HR service for a case. Enable an HR agent to transfer the case to the appropriate HR service rather than having to spend significant time manually triaging cases to appropriate HR services.

Important: This feature is available with the HR Professional and HR Enterprise packages when you activate the HR Service Delivery and Predictive Intelligence applications. If you do not want to use this feature, disable the *sn_hr_core.case_auto_categorization* system property.

Auto-determined HR service displayed in a banner

After you create a case, the HR Case Classification solution definition auto determines the HR service based on the short description of the case. The appropriate HR service for the case is displayed in a banner.

Important: The banner is not displayed if:

- you have logged the case under the correct HR service
- you have manually transferred or auto-transferred the case
- case is not in the ready or draft state

You can also transfer the case from one HR service to another, without losing the case number or content, using the link on the banner. The auto-determined HR service is selected by default on the Transfer case window. You can ignore the auto-determined HR service for the case, choose to transfer the case to a different HR service, or continue with the HR service that was provided earlier.

Auto training the predictive model

The HR Case Classification solution definition is configured and the predictive model is auto trained when all the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- There are 10000 records of HR case study matching the filters defined in the solution definition.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

You can manually train the predictive model if it is not auto trained by default. Later, navigate to the **HR AI configuration** module, open the HR Case Classification record, and map the configured solution definition.

Manually train the HR predictive model

Manually train the HR predictive model if it not auto trained by default.

Before you begin

Role required: admin

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Procedure

1. Navigate to **Predictive Intelligence** > **Homepage.**
2. Select the required solution definition.
3. Click **Train**.
4. To configure a solution definition:
   a. Open the solution definition.
   b. Right-click the solution definition, and click **Copy Solution Definition**.

> **Important:** Ensure that the Application scope is **Human Resources: Core**.

A copy of the solution definition is created. Update the required field values in this solution definition and click **Submit and Train**.

Auto determination of assignment group

Auto determine the assignment group for a case. Enable an HR agent to transfer the case to correct assignment group rather than having to spend significant time manually identifying groups for HR cases.

> **Important:** This feature is available with the HR Professional and HR Enterprise packages when you activate the HR Service Delivery and Predictive Intelligence applications. To use this feature, enable the *sn_hr_core.case_auto_assignment* system property.

Auto-determined assigned group displayed in a banner

After you create a case, the Auto Assignment Group for HR Cases solution definition auto determines the assignment group for a case based on the Short description, Description, Opened for Title, Opened for Location Name, and HR service of the case. The appropriate assignment group for the case is displayed in a banner.

> **Important:** The banner is not displayed if:
>
> - You have manually assigned the case to an assignment group.
> - The assignment group is not identified for the case.
> - The case is not in the ready or draft state.

Auto training the predictive model

By default the Auto Assignment Group for HR Cases solution definition is configured and the predictive model is auto trained when all of the following conditions are met.

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- There are 10000 records of HR case study matching the filters defined in the solution definition.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

You can manually train the predictive model if it is not auto trained by default. After you manually train the predictive model, navigate to the **HR AI configuration** module, open the Case Assignment group record, and map the configured solution definition.

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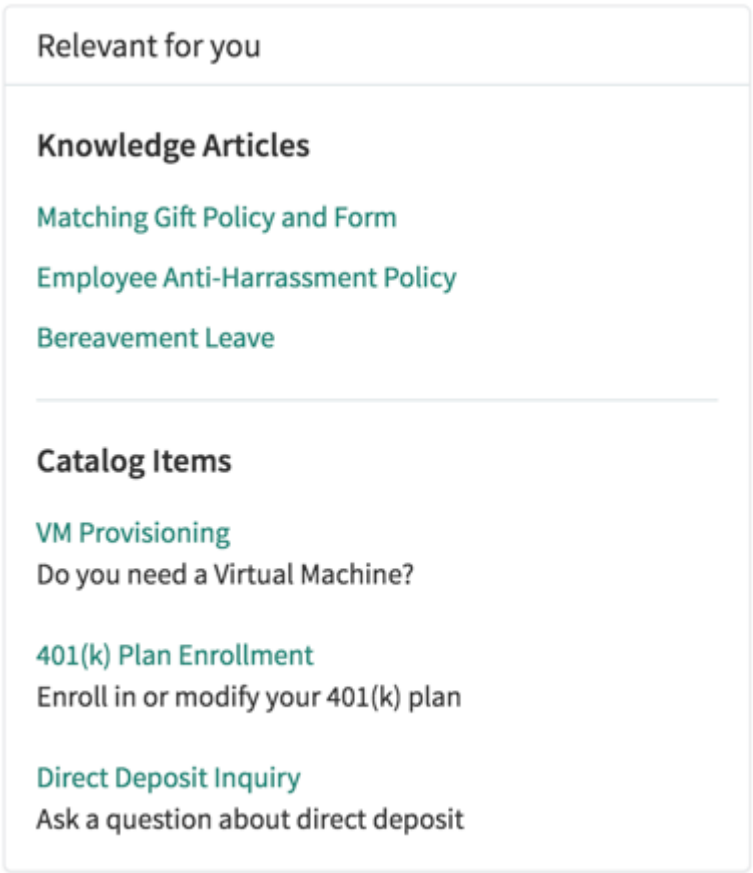
Discovering knowledge articles and catalog items for employees

Discover all the users who have a similar profile as the employee who has logged in to Employee Service Center. Identify the top viewed knowledge articles and top submitted catalog items by those users. Display the top three knowledge articles and top three catalog items to the employee.

Top three knowledge articles and top three catalog items

When the User Profile Based Recommendation (ml_sn_sn_hr_core_global_user_profile_based_recommendation) solution definition is configured and the predictive model is trained, the top three knowledge articles and top three catalog items are displayed to an employee in Employee Service Center and HR Ticket page.



Auto training the predictive model

By default, the User Profile Based Recommendation solution definition is configured and the predictive model is auto trained when all the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

You can manually train the predictive model if it is not auto trained by default. After you manually train the predictive model, navigate to the **HR AI configuration** module, open the Similar users group record, and map the configured solution definition.

Configuring widget options

You can also configure the following widget options:

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- **User prediction count**: Number of similar users discovered by the predictive model. By default, the top 25 similar users are discovered for the user.
- **Recent activity cut off days**: Number of days considered by the predictive model for querying the articles and catalog items. By default, the last 30 days activity is checked from the Knowledge Use table, Requested Items table, and Items Produced Records table.

To configure the widget options, navigate to the **Service Portal Configuration** module, select the widget editor, search for **Relevant for you**, and click **Edit Option Schema**.

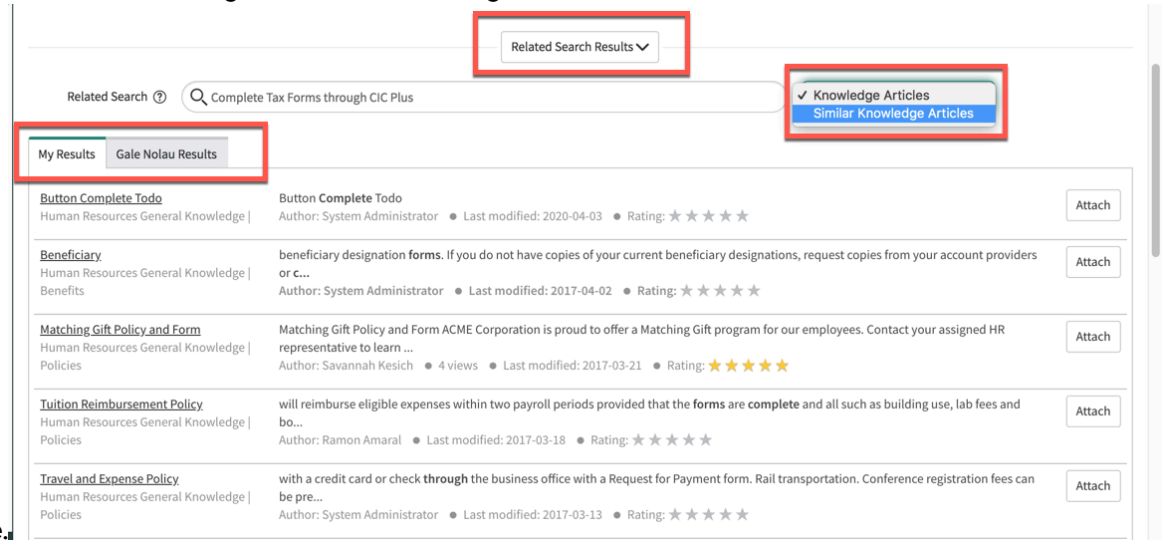
Discovering similar knowledge articles for HR cases

Discover similar information across knowledge articles based on the short description of the HR case and the text in the related search results. Display such similar knowledge articles to an HR agent to resolve a case.

Similar knowledge articles

The similarity solution takes the short description of the case and compares them to the short description, description, and text fields of the published articles to provide the similar knowledge articles.

When the Similar Knowledge Articles for HR Case (ml_sn_sn_hr_core_global_case_to_articles) is configured and the predictive model is trained, the **Similar Knowledge Articles** option is displayed on an HR case. This option displays the most relevant knowledge articles to an HR agent to resolve an HR case.



Auto training the predictive model

The Similar Knowledge Articles for HR Case solution definition is configured and the predictive model is auto trained when all the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence for Contextual Search (com.snc.contextual_search_ml) plugin is installed.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

You can also manually train the predictive model if it is not auto trained by default.

Discovering similar closed cases for HR cases

Help an HR agent resolve the current case by displaying similar closed cases.

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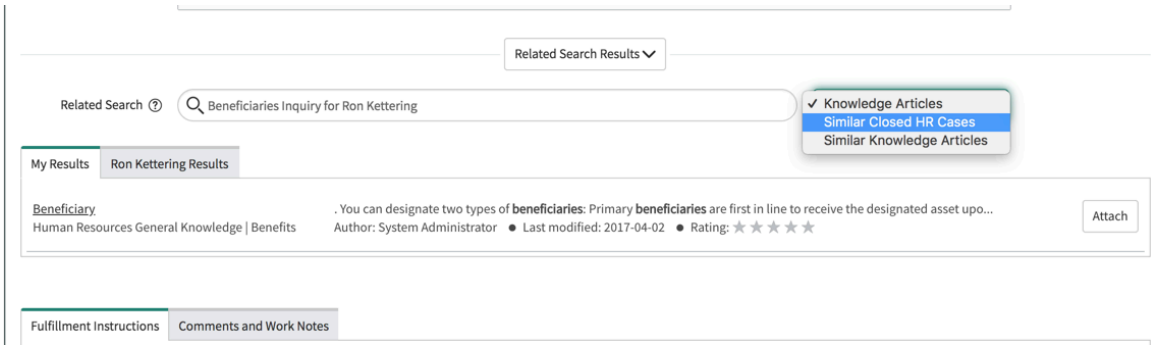
Similar Closed HR Cases

When the Similar Closed HR Cases (ml_sn_sn_hr_core_global_similar_closed_hr_cases) is configured and the predictive model is trained, the **Similar Closed HR cases** option is displayed on an HR case. This option displays the most relevant HR closed cases to an HR agent to help resolve the current HR case.

Similar Closed HR Cases



Auto training the predictive model

The Similar Closed HR Cases (ml_sn_sn_hr_core_global_similar_closed_hr_cases) is configured and the predictive model is auto trained when all the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence for Contextual Search (com.snc.contextual_search_ml) plugin is installed.
- The *glide.platform_ml.auto_training.enabled* system property is set either set to true or absent.

Displaying related knowledge articles for completing tasks

Display knowledge articles that help in completing HR and Content tasks in the Employee Service Center To-dos page and the HR Ticket page.

Related knowledge articles

When the following solution definitions are configured and predictive models are trained, the related knowledge articles are displayed to an employee in Employee Service Center and the HR Ticket page.

- The related knowledge articles are displayed for an HR task in Employee Service Center and the HR Ticket page, when you train the Similar Knowledge Articles for HR Task (ml_x_sn_hr_core_global_similar_knowledge_articles_for_hr_task) solution definition.
- The related knowledge articles are displayed for a Content task in Employee Service Center and HR Ticket page, when you train the Similar Knowledge Articles for Content task (ml_sn_sn_cd_global_similar_knowledge_articles_for_content_task) solution definition.

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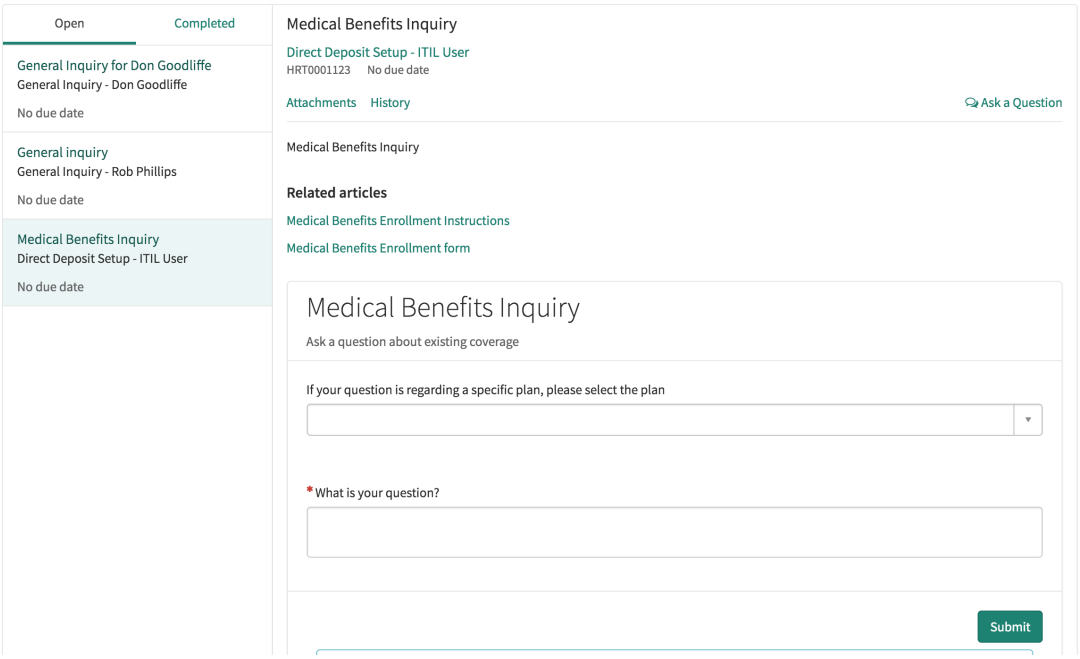

Auto training the predictive models

The Similar Knowledge Articles for HR Task and Similar Knowledge Articles for Content Task solution definitions are configured and predictive models are auto trained when the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- The Employee Center (com.sn_hr_service_portal) plugin is required to display related articles for HR tasks.
- The Content Delivery (com.sn_content_delivery) plugin is required to display related articles for Content tasks.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

You can manually train the predictive models if they are not auto trained by default. After you manually train the predictive models, navigate to the **Service Portal Configuration** module and select the Widget editor. Search for **Recommended articles for to dos**, click **Edit Option Schema**, and add the configured solution definitions in the following widget options:

- Solution name for Content Task
- Solution name for HR Task

HR Predictive Intelligence Workbench

The HR Predictive Intelligence Workbench application provides prebuilt use case templates and guides you through your predictive machine-learning implementation to create intelligent HR processes. Business process architects use prebuilt functionality, including pretrained models, to get started with machine learning use cases.

Overview

The HR Predictive Intelligence Workbench includes prebuilt use case templates that systematically guides you through the process of creating and training new predictive models, evaluating and testing them, and finally adding them to your business process to add value to your HR organization.

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Once you train your custom use cases, they are usable immediately. No prior knowledge or experience with artificial intelligence or machine learning is required when you use HR Predictive Intelligence Workbench.

The application includes a template with prebuilt guidance to assist you in creating, training, evaluating, testing, and producing, your unique predictive models.

Important: The HR Predictive Intelligence Workbench application depends on the activation of the Predictive Intelligence Workbench and Human Resources Scope App: Core plugins.

HR Predictive Intelligence Workbench administration

With the sn_piwb_hr_content.admin role, you can activate and configure the application to meet specific requirements.

- Configure Predictive Intelligence Workbench property settings, such as the minimum number of predictions for evaluating use cases that under perform and the minimum percentage of net automation to show an auto-trained model.
- Create a Predictive Intelligence Workbench user group and assign users necessary roles to move through the model implementation process.
- Configure notifications to alert Predictive Intelligence Workbench users via email when a new model is trained and ready for evaluation.
- Create use case templates and make them available to your Predictive Intelligence Workbench users.

Activate HR Predictive Intelligence Workbench

You can activate the Predictive Intelligence Workbench HRSD content plugin [com.sn_piwb_hrsd_content] if you have the admin role.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Tokyo)

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Components installed with HR Predictive Intelligence Workbench

Several types of components are installed with activation of the HR Predictive Intelligence Workbench HRSD content plugin [com.sn_piwb_hrsd_content] plugin, including user roles.

Roles installed

Roles installed with HR Predictive Intelligence Workbench

Role title [name]	Description	Contains roles
sn_piwb_hr_content.admin	With this role, you can: • Configure Predictive Intelligence Workbench property settings, such as the minimum number of predictions for evaluating use cases that under perform and the minimum percentage of net automation to show an auto-trained model. • Create a Predictive Intelligence Workbench user group and assign users necessary roles to move through the model implementation process. • Configure notifications to alert Predictive Intelligence Workbench users via email when a new model is trained and ready for evaluation. • Create use case templates and make them available to your Predictive Intelligence Workbench users.	

HR Predictive Intelligence Workbench notifications

HR Predictive Intelligence Workbench includes several email notifications that alert users throughout the use-case model implementation.

The Predictive Intelligence process architects who are creating and training use-case models receive an email notification when a use-case model is successfully trained and when batch testing has finished successfully. If a use case fails training or if batch testing produces errors, users will receive notifications about these scenarios, as well.

Users can click a link in the email notification to view a newly trained use case or batch test results. They can also download the test results, if desired. Users can receive the following notifications:

Notifications

Name	Description
Use case model training successful Table: PI Solution Model [piwb_model]	Use case model training successful Table: PI Solution Model [piwb_model]
Batch test run complete	Sends an email to a specified user group when batch testing is complete.
Use case Model training failed Table: PI Solution Model [piwb_model]	Sends an email to a specified user group when a use case model training has failed.

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For more details about email notifications for Predictive Intelligence Workbench, see Preview email notification.

Create an HR Predictive Intelligence Workbench user group

Create an HR Predictive Intelligence Workbench user group and add users or roles to the group to receive email notifications when the use-case model training and testing phase are complete.

Before you begin

Role required: admin

About this task

Create an HR Predictive Intelligence Workbench user group and add either users or roles to the group so that email notifications are sent to alert users throughout the use case model training and testing phases. Users can receive notifications for the following Predictive Intelligence Workbench events.

- Use case training is successful
- Batch testing is complete
- Use case training has failed

Procedure

To create an HR Predictive Intelligence Workbench user group and add users, see Create a user group Create a user group.

For more information about the email notifications provided with this application, refer to HR Predictive Intelligence Workbench notifications.

HR Predictive Intelligence Workbench implementation

You can use machine learning to optimize your business processes. You can train and implement HR Predictive Intelligence Workbench use cases to augment your existing application workflows.

Explore common use case templates

With the sn_piwb_hr_content.admin role, you can explore the use case templates and create predictive machine learning models. To create a machine learning model, you first select a pre-built use case template. You can use one of the following templates for setting up the use cases.

- **Guided** templates include a comprehensive setup process to help you through implementation. Templates with available auto-trained models accelerate your setup process, by providing a pre-generated model based on your data.
- **Classic** templates include a comprehensive setup information to help you through implementation. Leverage the existing templates to configure, test, and train the models based on your business requirements.

When a template indicates **Auto-trained model available**, this means you can go directly to the evaluation phase of the use case setup. If the auto-trained model is acceptable, you can directly integrate the model with your business processes. Otherwise, you can tune this model or create another model. You may change the name and description of the use case later.

Solution definitions

These solution definitions are available as templates on instances where both Predictive Intelligence and HR are active. Create your own solution definition records to customize the behavior.

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HR Solution Definitions

Solution Type	Solution Definition	Description	Implementation
Classification	Predict the HR service for incoming cases	Predicts the correct HR service for cases.	Guided
Classification	Predict the assignment group for incoming cases	Predicts the correct assignment group for cases.	Guided
Classification	Email Case Categorization	Auto-categorizes the HR service for the email cases for improved productivity by saving time and costs.	Guided
Similarity	Similar Closed HR Cases	Recommends similar cases closed in the past to assist an HR agent for faster and better resolution.	Classic
Similarity	User profile based recommendation	Recommends top 3 relevant articles and catalog items based on users with a similar profile for content discovery and personalized experience.	Classic
Similarity	Similar HR Cases and knowledge	Automates the discovery of knowledge gaps in your knowledge bases and recommends insights into improving knowledge that is driven by demand.	Classic
Similarity	Similar Knowledge Articles for HR Task	Displays related articles to assist employees in completing the HR or Content or Campaign to-dos.	Classic
Similarity	Similar Knowledge Articles for HR Case	Uses ML to identify the most relevant knowledge articles to assist an HR agent for faster and better resolution.	Classic
Regression	HR Case Resolution Time	Determines the resolution time expected a case by	Classic

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HR Solution Definitions (continued)

Solution Type	Solution Definition	Description	Implementation
		analyzing similar closed cases in past for better visibility and transparency.	
Clustering	Demand Insights: HR Case Clusters Need Knowledge	Identifies the case clusters that do not have knowledge and helps with filling the knowledge gaps in your knowledge base.	Classic

Use case creation phases

Creating a predictive machine learning model involves several phases. After you create and train your model, evaluate and tune, test prediction results, and integrate the model with your business process. Use case model creation phases include:

- **Create and train models:** Define parameters to create a model that you train based on your unique data. Create multiple models as you tune and refine your models by defining the right combination of coverage and precision to use.
- **Test your models:** Get prediction results from your models to decide which one is best to integrate with your business process. To see if a model returns a correct result, you can use either the single or batch testing process.
- **Integrate the best model:** Deploy the best model into your business process. After you determine which model returns the best, correct result, integrate it into production.

Prediction accuracy maintenance

You can manage prediction drift by retraining, modifying, or creating new solutions to reflect changes in your business conditions. Test and modify your business rule over time to ensure it works as desired across multiple consumption points and user persona.

Related topics

Predictive Intelligence

Get started with Predictive Intelligence

HR PIWB template: Auto-categorize email cases

Use a guided template that walks you through setting up a machine learning model to categorize the email cases automatically for improved productivity and cost savings.

Before you begin

Role required: sn_piwb_hr_content.admin

About this task

This template walks you through customizing a use case model to categorize the email cases. When the use case template shows the label **Guided**, you can use several implementation steps and are automatically taken to evaluate and tune your models when you click **Start**. Otherwise, you begin by creating a machine learning model.

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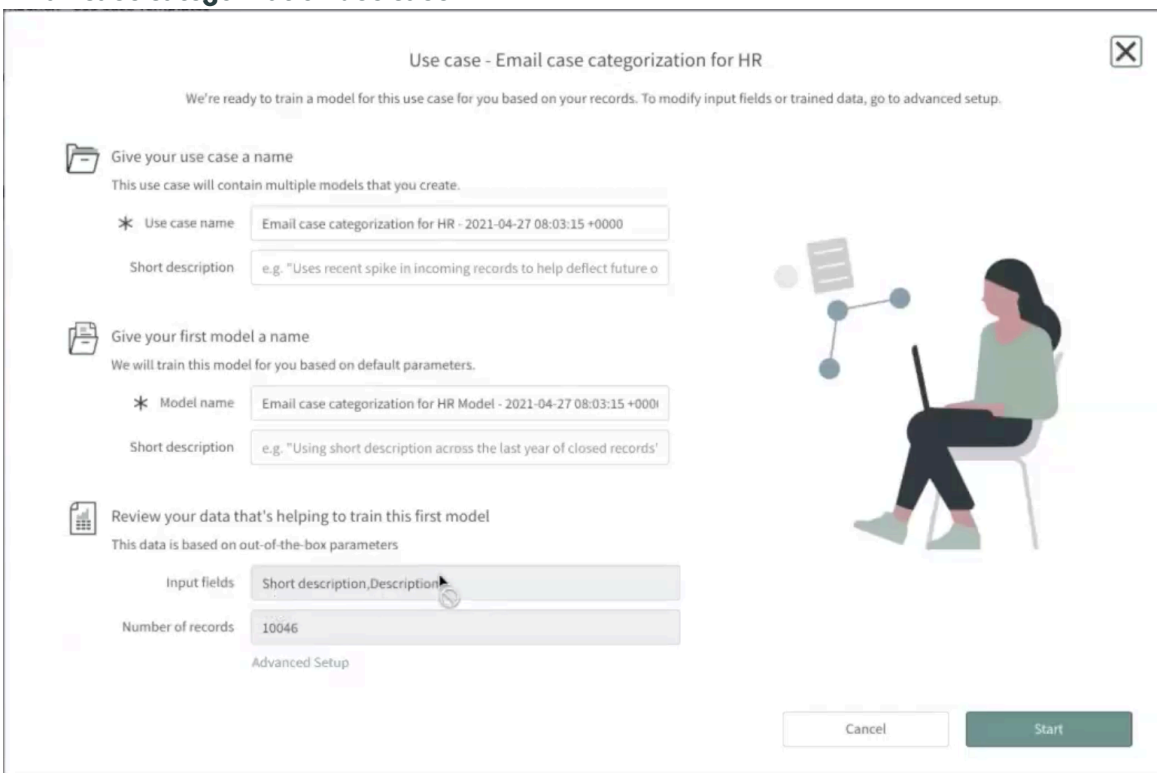
Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. Select the **Email case categorization for HR** guided template.

Email case categorization use case



3. Provide a unique name for your use case in the **Use case name** field.

> **Note:** The use case contains multiple models that you create. You can use the same name as the template, if required.

4. Provide a name for the model in the **Model name** field.

> **Note:** Models are trained based on default parameters. The name of the model should reflect its purpose, for example, `Email case categorization for HR`.

5. Click **Start**.

> **Note:** To start implementation, you must provide a use case name and short description.

The use case setup page opens displaying the name and description of the use case you created. On this page, you can see all the implementation phases to create and implement your use case model.

6. In the **Create and train models** section of the setup, click **Start** to create a model associated with your use case.
7. Fill in the required fields with a **Model name** and **Short description**.

> **Note:** Other data related to the model is pre-filled by default, such as the **Data table**, **Predicted field**, and **Processing Language**.

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8. Expand the **Review the filters used to train this model** section to view the default filters.

   Review the base system parameters set to help train the model in the **Input fields** and **Number of records** fields. To modify this data, click **Advanced Setup** and then **Save** any changes you make. You can customize the filters to best represent your business data or add new criteria by clicking **New Criteria**.

   Note: By clicking **Advanced Setup** you can change the processing language, review, and modify the filters used to train the model. You can customize the filters to best represent your business data or add new criteria by clicking **New Criteria**. Review and modify the input fields used to generate predictions. Customize the fields to best represent your business data by moving fields between the **Available** and **Selected** lists. Ensure that you have sufficient number of records for the model. Save any changes you make.

9. Click **Save**.
   The use case **ML Model** setup page opens.
10. Click **Continue** in the **Create and train models** section.
    The **Create a model** page opens.
11. Click **Train this model**.
    The process may take a while. The **Train this model** window appears letting you know that the process takes a while.
12. Click **Start** to initiate training.
    The ML Model setup page opens.
13. Click **View Progress** below the header on the ML Model setup page to monitor the training process and click close.
14. **Optional:** Click **View Progress** below the header on the use case setup page to monitor the training process.
15. Click **Start** to initiate training.
    The use case setup page opens with the trained model.
16. On the available trained model, click the **Tune values**.
    The use case model record opens. You can view the **Precision(%)**, **Coverage(%)**, and **Net Automation(%)** scores.

    Note: Refine your use case model by defining the right combination of coverage and precision values.

17. When you are ready to test your use case model, click **Test your models** .

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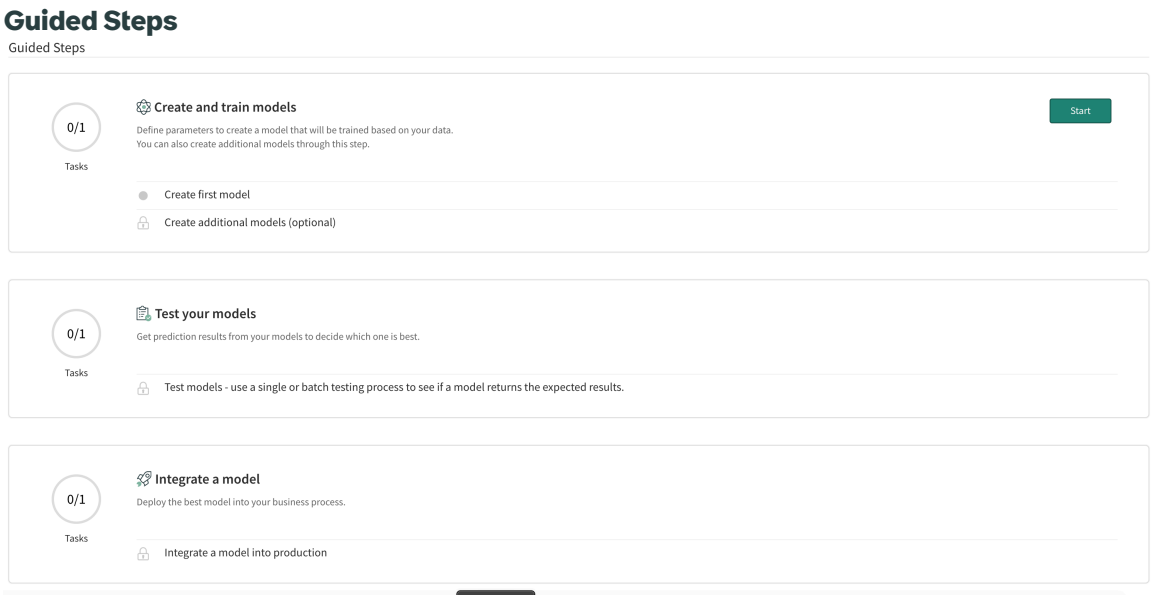

The use case **Testing your models** page opens.

18. In the **Select models to test** section, refine the models for testing and comparison.
    Move the options from **Available** to the **Selected**. Remember, selecting more models takes more processing time for a batch test.
19. In the **Define testing parameters** section, decide if you want to test one use case model.

    Select the **Single test** test type. **Single test** is the default.

    Note: Select **Batch test** when you want to test more than one use case model.

    Determine the number of top results you want to display.
20. In the **Input fields** section, provide a short description of your use case model test.
21. Click **Run Test**.
    View the test results data in the View test results section with details such as predicted values and confidence.
22. Click **Mark as complete** to complete testing.
23. When you are ready to integrate your use case model into your business processes, click **Start** in the **Integrate a model** section.
24. In the **Select a model to integrate** section, select the model from the available list.
25. In the **Retraining Schedule** field you can change the definition, if desired.
    The default value is **Run Once**, but you can retrain as often as every 30 days to every 180 days.
26. Click **Integrate**.
    On the confirmation pop-up, click **Integrate** again to complete this action. You have integrated a use case model into your business process.

Result

When the configuration is complete, the solution auto-categorizes the HR service for email cases. For more information, see Auto-case creation from an email

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

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Related topics

Predictive Intelligence

Get started with Predictive Intelligence

Predictive Intelligence Workbench integration and customization

HR PIWB template: Predict the HR service for incoming cases

Use a guided template that walks you through setting up a machine learning model to predict the correct HR service for cases.

Before you begin

Role required: sn_piwb_hr_content.admin

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. Select the **Predict the Service for HR Cases** guided template.
3. Provide a unique name for your use case in the **Use case name** field.
4. Provide unique details about the use case in the **Short description** field.
5. Click **Start**.

   Note: To start implementation, you must provide a use case name and short description.

   The use case set up page opens displaying the name and description of the use case you created. On this page, you can see all the implementation phases you will work through to create and implement your use case model.
6. In the **Create and train models** section of the setup, click **Start** to create a model associated with your use case.
7. Fill in the required fields with a **Model name** and **Short description**.

   Note: Other data related to the model is pre-filled by default, such as the **Data table**, **Predicted field**, and **Processing Language**.

8. Expand the **Review the filters used to train this model** section to view the default filters. You can customize the filters to best represent your business data or add new criteria by clicking **New Criteria**.
9. Expand the **Review the input fields for this model** section to view the pre-populated fields. You can customize the fields to best represent your business data by moving fields between the **Available** and **Selected** slush buckets.
10. Click **Save**.
    The use case **ML Model** setup page opens.
11. Click **Continue** in the **Create and train models** section.
    The **Create a model** page opens.
12. Click **Train this model**.
    The process can take a while. The **Train this model** window appears letting you know that the process will take a while.
13. Click **Start** to initiate training.
    You are returned to the ML Model setup page.

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14. Click **View Progress** below the header on the ML Model setup page to monitor the training process.
15. Click **Start** to initiate training.
    You are returned to the use case setup page.
16. Click **View Progress** below the header on the use case setup page to monitor the training process.
17. On the use case setup page, click **Start** in the **Evaluate and tune your models** section.
    The use case **Evaluate and tune your models** page opens. Here you can refine your use case model, defining the right combination of coverage and precision to use.
18. Click the box next to the use case model that you want to evaluate and tune.
    You can view the evaluation data for the use case model by clicking the chevron icon next to the model name to expand details.
19. In the **Select an Action** list menu, select **Open model record**.
    The use case model record opens. You can view the **Precision(%)**, **Coverage(%)**, and **Net Automation(%)** scores.
20. In the **Retraining Schedule** field you can change the definition, if desired.
    The default value is **Run Once**, but you can retrain as often as every 30 days to every 180 days.
21. If you made evaluation or tuning changes to the use case model, click either **Update** or **Update and retrain**, to run retraining again one time.
    The use case **Evaluate and tune your models** page opens.
22. If you are ready to test your use case model, click the box next to the model that you want to test.
23. In the **Select an Action** list, select **Test this model**.
    The use case **Testing your models** page opens with the use case model you selected to test is in the **Selected** slush bucket.
24. In the **Select models to test** section, decide if there are other use case models available that you want to test.
    If so, move them to the **Selected** slush bucket.
25. In the **Define testing parameters** section, decide if you want to test one use case model.

    If so, select the **Single test** test type. **Single test** is the default.

    Note: Select **Batch test** when you want to test more than one use case model.

26. Determine the number of top results you want to display.
27. In the **Input fields** section, provide a short description of your use case model test.
28. Click **Run Test**.
29. View the test results data for the use case model in the **View test results** section.
30. If you are ready to integrate your use case model into your business processes, return to the use case **Evaluate and tune your models** page and select the box next to the model that you want to integrate.**Start** in the **Integrate the best model** section.
31. In the **Select an Action** list menu, select **Integrate this model**.
    The **Select a model to integrate** page opens.
32. Click **Integrate**.
33. Click **Integrate** again when the pop-up asks you if you are sure you want to perform this action.

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You have integrated a use case model into your business process.

Note: For details regarding trained use case integration implementation, refer to Predictive Intelligence Workbench integration and customization.

HR PIWB template: Predict the assignment group for incoming cases

Use a guided template that walks you through setting up a machine learning model to predict the correct assignment group for cases.

Before you begin

Role required: sn_piwb_hr_content.admin

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. Select the **Predict Assignment Group for HR Cases** guided template and click **Start**.
3. Provide a unique name for your use case in the **Use case name** field.
4. Provide a unique name for the model in the **Model name** field.
5. Click **Advanced Setup**.
   The use case set up page opens displaying the name and description of the use case you created. On this page, you can see all the implementation phases you will work through to create and implement your use case model.
6. In the **Create a model** section of the setup, fill in the required fields with a **Model name** and **Short description**

   Note: Other data related to the model is pre-filled by default, such as the **Data table**, **Predicted field**, and **Processing Language**.

7. Expand the **Review the filters used to train this model** section to view the default filters. You can customize the filters to best represent your business data or add new criteria by clicking **New Criteria**.
8. Expand the **Review the input fields for this model** section to view the pre-populated fields. You can customize the fields to best represent your business data by moving fields between the **Available** and **Selected** slush buckets.
9. Click **Save**.
   The use case **ML Model** setup page opens.
10. Click **Continue** in the **Create and train models** section.
    The **Create a model** page opens.
11. Click **Train this model**.
    The **Train this model** window appears letting you know that the process will take a while.
12. Click **Start** to initiate training.
    You are returned to the ML Model setup page.
13. Click **View Progress** below the header on the ML Model setup page to monitor the training process.
14. Click **Start** to initiate training.
    You are returned to the use case setup page.
15. Click **View Progress** below the header on the use case setup page to monitor the training process.
16. On the use case setup page, click **Start** in the **Evaluate and tune your models** section.

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The use case **Evaluate and tune your models** page opens. Here you can refine your use case model, defining the right combination of coverage and precision to use.

17. Click the box next to the use case model that you want to evaluate and tune.
    You can view the evaluation data for the use case model by clicking the chevron icon next to the model name to expand details.
18. In the **Select an Action** list menu, select **Open model record**.
    The use case model record opens. You can view the **Precision(%)**, **Coverage(%)**, and **Net Automation(%)** scores.
19. In the **Retraining Schedule** field you can change the definition, if desired.
    The default value is **Run Once**, but you can retrain as often as every 30 days to every 180 days.
20. If you made evaluation or tuning changes to the use case model, click either **Update** or **Update and retrain**, to run retraining again one time.
    The use case **Evaluate and tune your models** page opens.
21. If you are ready to test your use case model, click the box next to the model that you want to test.
22. In the **Select an Action** list, select **Test this model**.
    The use case **Testing your models** page opens with the use case model you selected to test is in the **Selected** slush bucket.
23. In the **Select models to test** section, decide if there are other use case models available that you want to test.
    If so, move them to the **Selected** slush bucket.
24. In the **Define testing parameters** section, decide if you want to test one use case model.

    If so, select the **Single test** test type. **Single test** is the default.

    Note: Select **Batch test** when you want to test more than one use case model.

25. Determine the number of top results you want to display.
26. In the **Input fields** section, provide a short description of your use case model test.
27. Click **Run Test**.
28. View the test results data for the use case model in the **View test results** section.
29. If you are ready to integrate your use case model into your business processes, return to the use case **Evaluate and tune your models** page and select the box next to the model that you want to integrate.**Start** in the **Integrate the best model** section.
30. In the **Select an Action** list menu, select **Integrate this model**.
    The **Select a model to integrate** page opens.
31. Click **Integrate**.
32. Click **Integrate** again when the pop-up asks you if you are sure you want to perform this action.
    You have integrated a use case model into your business process.

    Note: For details regarding trained use case integration implementation, refer to Predictive Intelligence Workbench integration and customization.

HR PIWB template: Predict knowledge case clusters and demand insights

Use the classic setup template to configure and train your Cluster solution template with machine learning model to predict the case clusters that do not have knowledge, identify knowledge demand, and improve the knowledge articles.

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Before you begin

Role required: sn_piwb_hr_content.admin

About this task

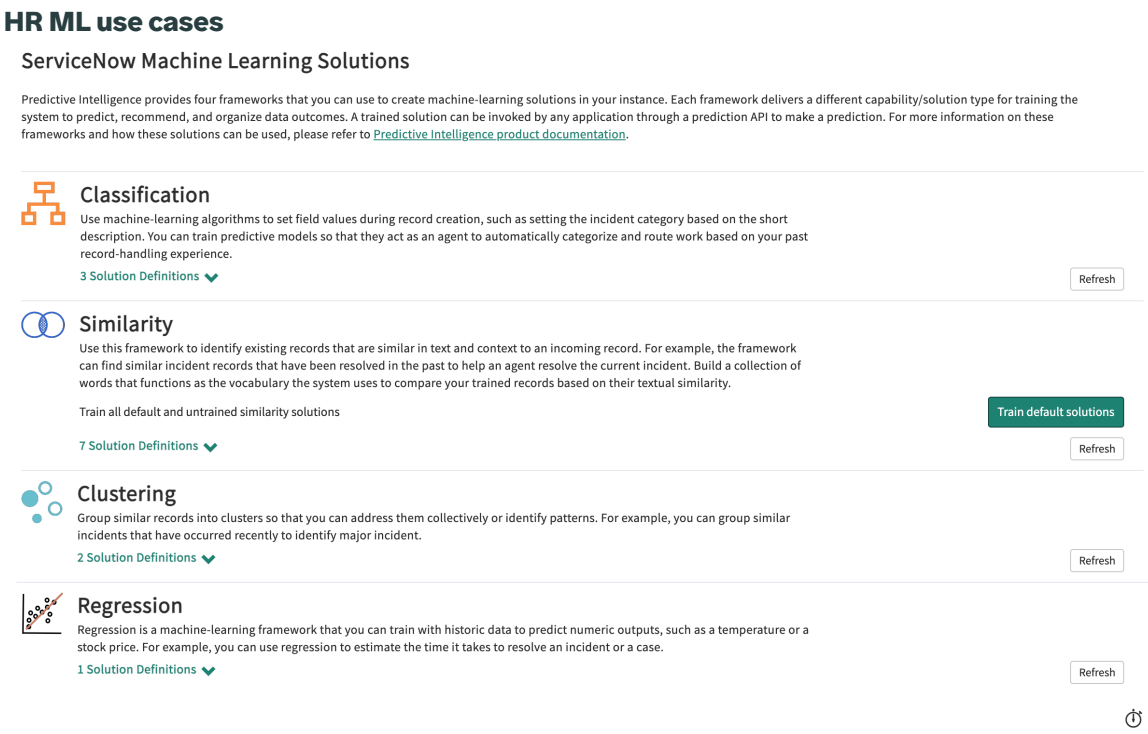
This template helps customizing a use case model to configure the Knowledge Demand Insights feature to identify which topics are missing knowledge articles and create actionable knowledge gaps for missing topics. Review the information from Configure Knowledge Demand Insights.

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Knowledge demand for HR case clusters** template and click **Start**.
   A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:
   a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

      Note: Ensure you review and understand the documentation for creating the solution definition.

   b. Click **Take me there** to get started with the solution definition.
   Machine Learning Solutions landing page appears.



3. Review the information from Configure Knowledge Demand Insights.
4. Go to **Clustering** > **Knowledge demand for HR case clusters** from the available Solution Definitions, click **Configure**.
   The solution definition appears.
5. On the form, verify the default field values and customize the solution as required.

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Result

You can use a demand insights for knowledge gap analysis and create actionable knowledge articles for missing topics.
Review the corresponding use case information from Machine learning solutions for HR Service Delivery.

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

Related topics

- Create and train a similarity solution
- Create and train a clustering solution

HR PIWB template: Predict knowledge gaps and insights

Use the classic template that walks you through setting up a machine learning model to automate the discovery of knowledge gaps and recommend insights into improving knowledge by demand.

Before you begin

Role required: sn_piwb_hr_content.admin

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Similar HR cases with knowledge gap** template and click **Start**.
   A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:
   a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

      Note: Ensure you review and understand the documentation for creating the solution definition.

   b. Click **Take me there** to get started with the solution definition.
   Machine Learning Solutions landing page appears.

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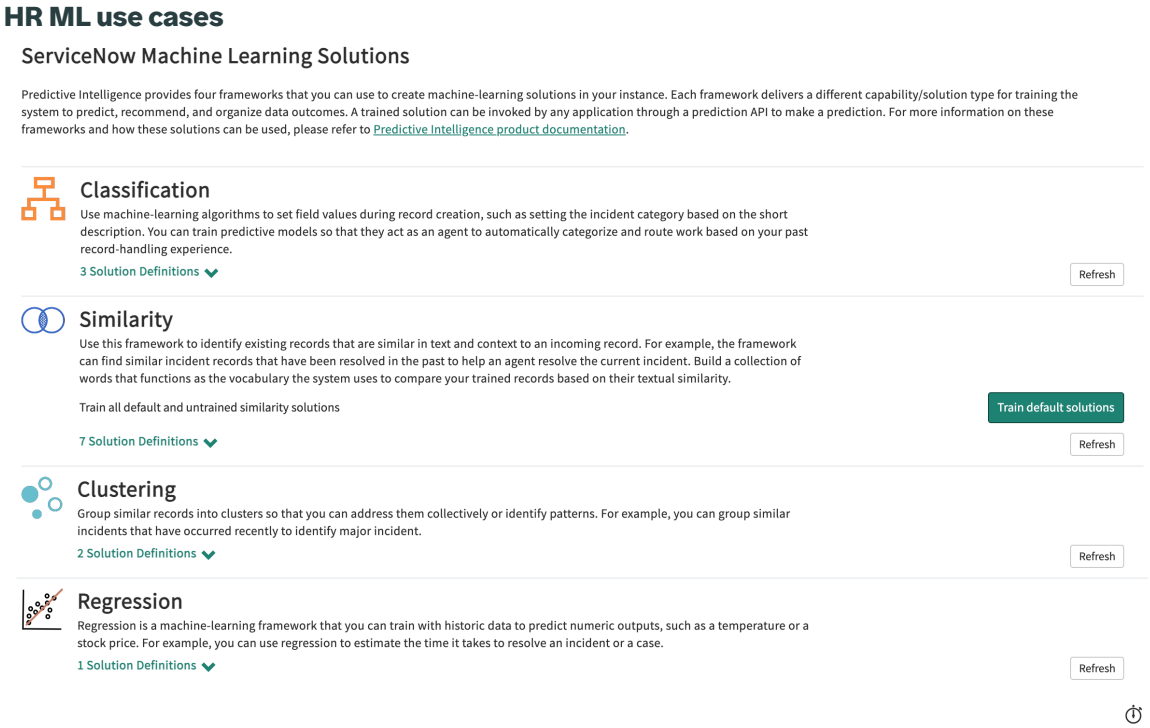

3. Go to **Similarity** and click **Configure**.
   The solution definition appears.
4. On the form, verify the default field values and customize the solution as required.

Result

When the configuration is complete, machine learning algorithm provides various Knowledge Management capabilities, such as similar articles and knowledge demand insights.

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

Related topics

Predictive Intelligence

Get started with Predictive Intelligence

HR PIWB template: Predict knowledge for HR case resolution

Use the classic setup template to configure and train your Similarity solution template with machine learning model to recommend knowledge articles to assist an HR agent for faster case resolution.

Before you begin

Role required: sn_piwb_hr_content.admin

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Knowledge for resolving HR Cases for agents** template and click **Start**.

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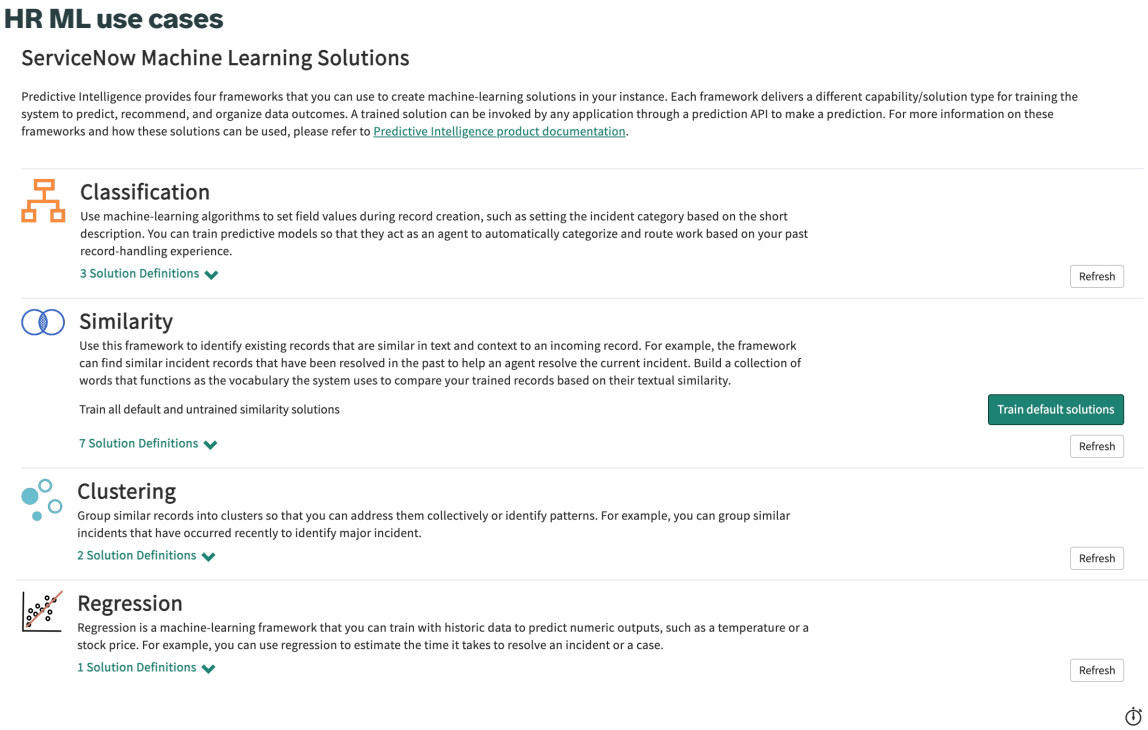
A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:

a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

> **Note:** Ensure you review and understand the documentation for creating the solution definition.

b. Click **Take me there** to get started with the solution definition.
Machine Learning Solutions landing page appears.



3. Go to **Similarity** > **Knowledge for resolving HR Cases for agents** from the available Solution Definitions, click **Configure**.
The solution definition appears.
4. On the form, verify the default field values and customize the solution as required.

Result

When the configuration is complete, agents can discover similar information across knowledge articles based on the short description of the HR case and the text in Related Search Results. Display of such similar knowledge articles can help an HR agent to quickly resolve the cases.

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

Related topics

Predictive Intelligence

Get started with Predictive Intelligence

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HR PIWB template: Recommend similar cases by employee profile

Use the classic setup template to configure and train your Similarity solution template with machine learning model to recommend top relevant articles and catalog items based on a similar employee profile for content discovery and personalized experience.

Before you begin

Role required: sn_piwb_hr_content.admin

About this task

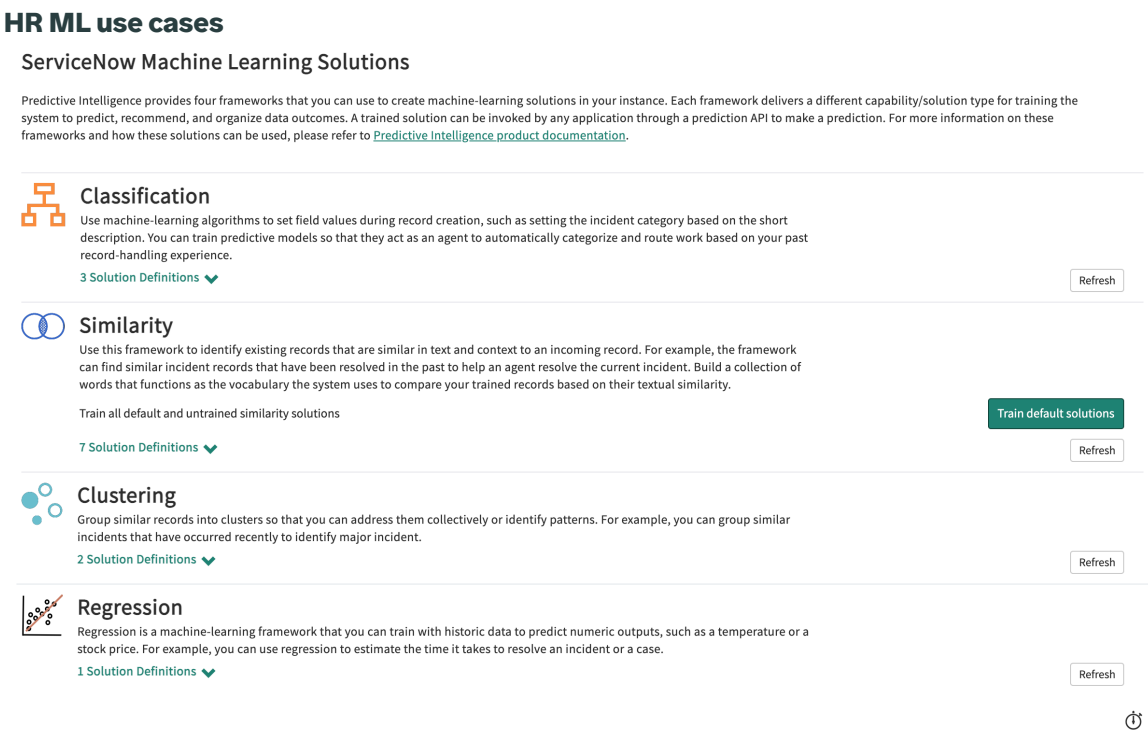
Discover all the users who have a similar profile as the employee. Identify the top viewed knowledge articles and top submitted catalog items by those users.

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Employee profile based recommendation** template and click **Start**.
   A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:
   a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

      Note: Ensure you review and understand the documentation for creating the solution definition.

   b. Click **Take me there** to get started with the solution definition.
   Machine Learning Solutions landing page appears.



3. Go to **Similarity** and click **Configure**.
   The solution definition section appears.
4. On the form, verify the default field values and customize the solution as required.

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For more information about the Clustering solution definition form fields, see Create and train a clustering solution and Test a classification solution prediction.

Note: For details regarding trained use case integration implementation, see Predictive Intelligence Workbench integration and customization.

Result

When the configuration is complete, the solution displays the top three knowledge articles and top three catalog items to the employee based on a similar employee profile. For more information, see Discovering knowledge articles and catalog items for employees.

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

Related topics

Predictive Intelligence

Get started with Predictive Intelligence

HR PIWB template: Predict knowledge for HR task completion

Use the classic setup template to configure and train your Similarity solution template with machine learning model to recommend knowledge articles for employees to complete the HR tasks.

Before you begin

Role required: sn_piwb_hr_content.admin

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Knowledge for completing HR tasks for employees** template.
   A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:
   a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

      Note: Ensure you review and understand the documentation for creating the solution definition.

   b. Click **Take me there** to get started with the solution definition.
   Machine Learning Solutions landing page appears.

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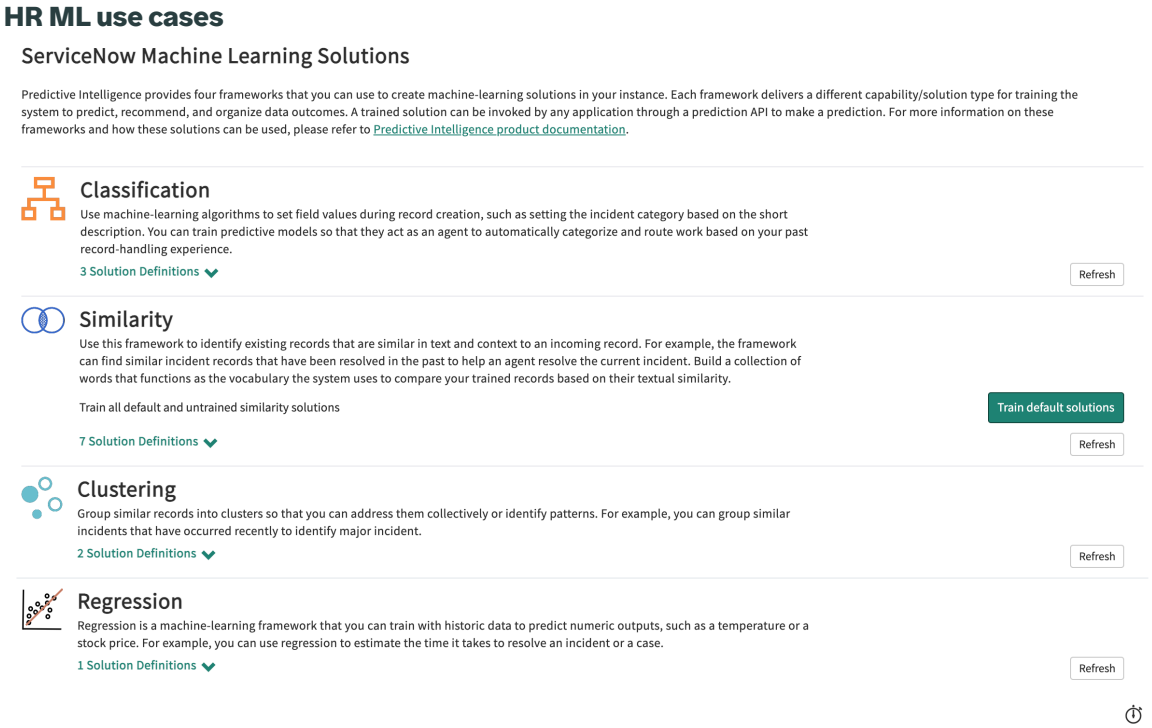

3. Go to **Similarity** and click **Configure**.
   The solution definition section appears.
4. On the form, verify the default field values and customize the solution as required.

Result

When the configuration is complete, the employees can complete HR or Content or Campaign to-dos based on the recommendations from the related articles.

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

Related topics

Predictive Intelligence

Get started with Predictive Intelligence

HR PIWB template: Recommend similar cases

Use the classic setup template to configure and train your Similarity solution template with machine learning model to recommend similar closed HR cases.

Before you begin

Role required: sn_piwb_hr_content.admin

About this task

When the Similar Closed HR Cases is configured and the predictive model is trained, the **Similar Closed HR cases** option is displayed on an HR case. This option displays the most relevant HR closed cases to an HR agent to help resolve the current HR case.

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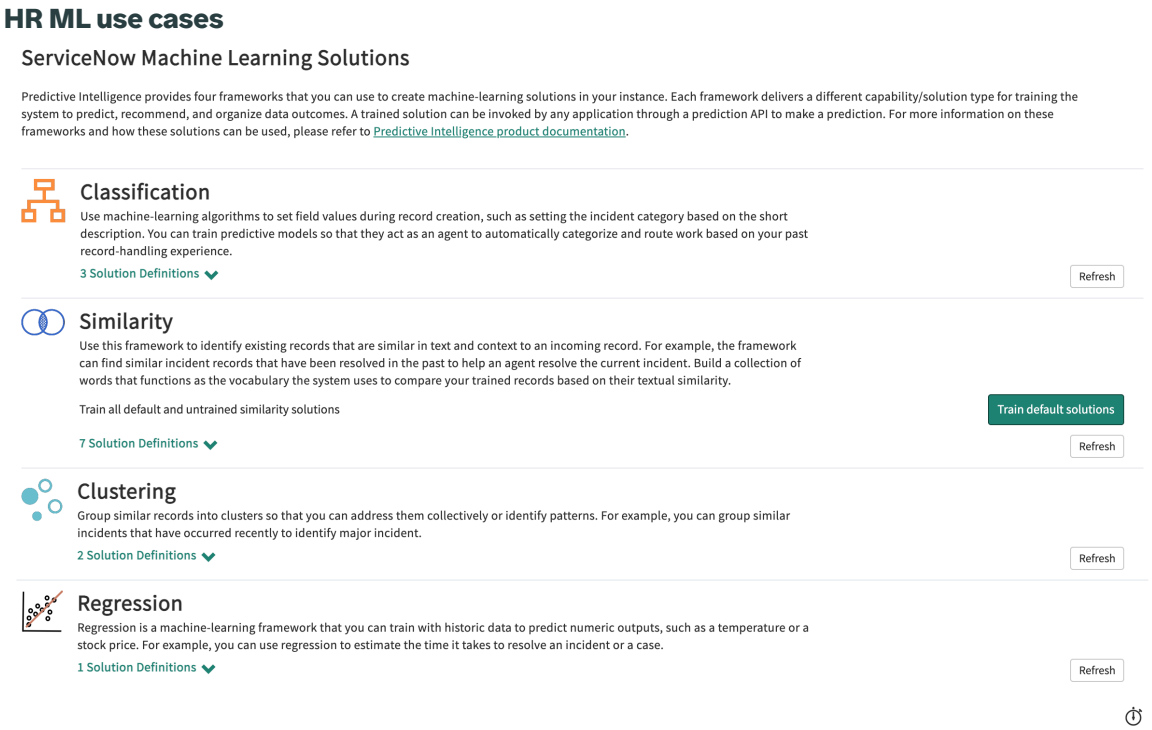
Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Similar closed HR Cases** template and click **Start**.
   A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:
   a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

      Note: Ensure you review and understand the documentation for creating the solution definition.

   b. Click **Take me there** to get started with the solution definition.
   Machine Learning Solutions landing page appears.



3. Go to **Similarity** and click **Configure**.
   The solution definition section appears.
4. On the form, verify the default field values and customize the solution as required.

Result

When the configuration is complete, the solution displays the most relevant HR closed cases to an HR agent to help resolve the current HR case.
Review the corresponding use case information from Machine learning solutions for HR Service Delivery.

What to do next

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

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Related topics

Predictive Intelligence

Get started with Predictive Intelligence

HR PIWB template: Recommend estimated time to resolve

Train your solution by using historical data to predict numeric outputs based on the historic data. Configure the solution definition to predict the estimated time to resolve a HR case.

Before you begin

Role required: sn_piwb_hr_content.admin

About this task

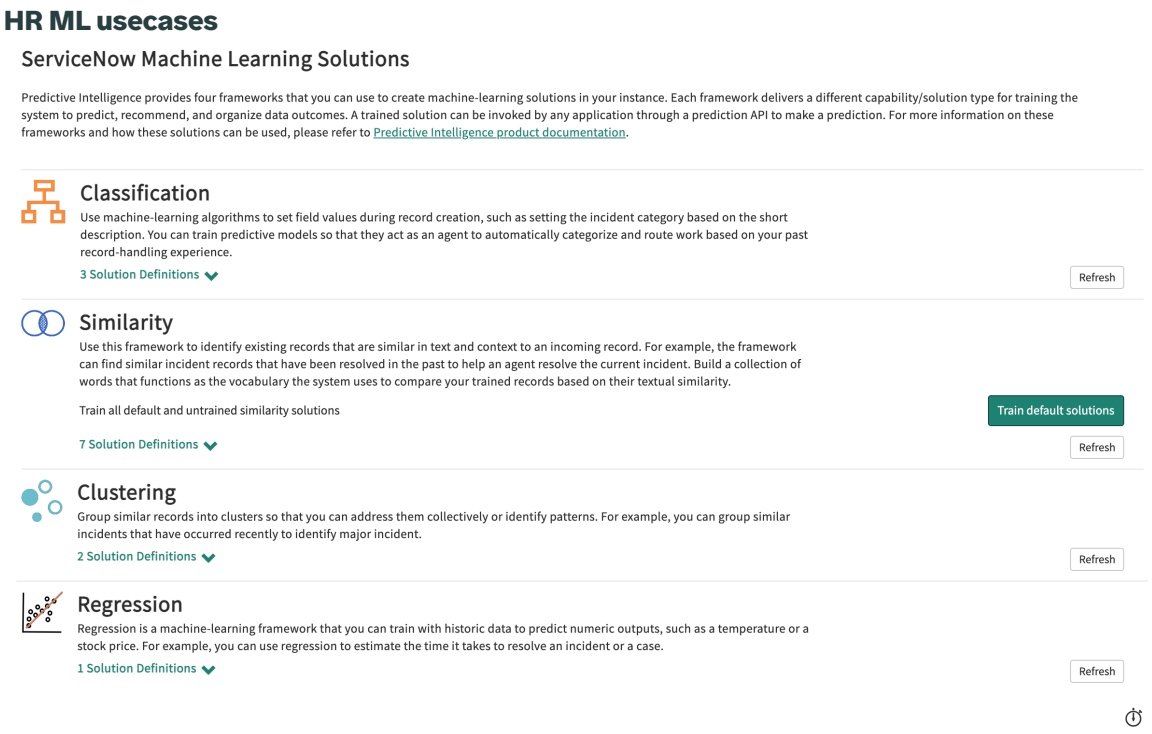
Regression solutions enable you to predict a point estimate and prediction interval. When making predictions, regression also enables you to specify a confidence level for the prediction interval (range). Understand the ETTR configuration information from Estimated time to resolve HR cases.

Procedure

1. Navigate to **All** > **Predictive Intelligence Workbench** > **Use Cases** > **Create New from Templates**.
2. From the templates list, go to **Estimated Time to Resolve an HR case** and click **Start**.
   A pop-up with model name appears. This use case is handled in the classic Predictive Intelligence. You will be taken there to complete setup. You can perform the following steps:
   a. Ensure you click **View product documentation for setting up this use case** to review the instructions on how to configure the solution definition.

      Note: Ensure you review and understand the documentation for creating the solution definition.

   b. Click **Take me there** to get started with the solution definition.
   Machine Learning Solutions landing page appears.



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3. Go to **Regression** > **ml_sn_sn_hr_core_global_hr_case_resolution_time** from the available Solution Definitions, click **Configure**.
   Regression solution definition for HR case resolution time appears.
4. On the solution definition form, configure these fields per the following guidance.

Form fields and configurations for solution definition

Field	Value
Label	Enter a unique name for your regression solution. For example, enter HR `Case Resolution Time`.
Name	As you enter your solution Label value, this field automatically populates with a system-assigned name that's similar to your label value `ml_sn_sn_hr_core_global_hr_case_resolution_time`
Word Corpus	Select an existing word corpus that's relevant to your solution. For example, in this use case you select a word corpus that has a title such as **Word Corpus Regression**. If you don't have a relevant word corpus, follow the steps in Create a word corpus. When the word corpus is complete, you can select it from the Word Corpus field in your Regression Definition form. However, the word corpus selection is optional. If your input data has text columns and you don't choose a word corpus, your regression solution trains a new word corpus model by using the text columns in your input data. The resulting word corpus can be reused in any other regression solution or other ML solution type. **Note:** The number of records per table for word corpus creation used in regression solutions is limited to 300,000.
Table	Select the database table on which you're applying regression. The table should contain historical records the system can use to predict the length of time for its database restore HR `Case [sn_hr_core_case]`.
Output Field	Select the field whose value you want the predictive model to set. In general, a good output field is a numeric, integer, or floating point field. In this example scenario, you use the **actual_resolution_time** field to measure a length of time. The output field should generate a numeric value.
Fields	Select one or more field types that help the system identify the records you want to train using regression. In this scenario, you use *`short_description, description, hr_service,assignment_group, topic_detail, topic_category,`*

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Field	Value
	priority,sys_class_name. Input field types can be string, nominal, or numeric.
Filter	(Optional) Add filter conditions to the output field records you want to train using regression. Ensure you have sufficient records by adjusting the filters. The minimum number of records for regression training is 10,000 records. The maximum number of records for regression training is limited to 300,000.
Processing Language	Select the dominant language of the dataset you're training on the solution definition. If the dataset language is English, choose **English**. Also, English processing is applied to all datasets by default. For example, if you select Italian, the system processes the data in both English and Italian. **Note:** The term processing indicates some of the language-specific steps used as part of training a solution. For example, tokenizing words, removing stop words, and stemming.
Stopwords	When you select your processing language, the system automatically adds a Stopwords list that uses the same language. For example, if your processing language is Italian, the **Default Italian Stopwords** list appears. The **Default English Stopwords** list also appears in your selection as well. If you create a custom stopwords list, you can select it from the Stopwords field to add it to your solution. In this scenario, you use the **Default English Stopwords** list.
Training Frequency	Select how often the system regenerates the solution based on records matching the **Filter**. Your options include: ○ Run Once ○ Every 30 days ○ Every 60 days ○ Every 90 days ○ Every 120 days ○ Every 180 days In this scenario, you select Every 30 days By default, the system runs training once. This practice provides you time to review and update the solution definition as needed until it provides acceptable coverage and precision values.

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Field	Value
	The minimum number of records required for regression solution training is at 10,000. The ML scheduler limits the number of trainings an instance can commit to 50 new ML training requests per instance within a 24 hour window. This excludes scheduled re-training requests. In addition, clustering and similarity updates are also excluded from this limit, even if the new training requests exceed 50 within a 24 hour window.

5. Click the appropriate context menu option or button for your solution definition.

Option	Description
Save or Save & Train	Save your solution definition record so you can return to it later, or save and submit it for training.
Submit or Submit & Train	Create your solution definition record and submit it, or submit and train it.

6. If you submitted the solution for training, click **OK** on the **Training Activation** window to confirm.
   The system schedules the solution for training with the nearest training service. The system sends you a notification when the training completes, including any errors that may have occurred in the training. Any other users can subscribe to the Predictive Intelligence Notifications category. When training completes, the system uploads the solution as an Attachment record.

   When the configuration is complete, the employees and agents see the estimated time to resolve at the request sections.

What to do next

In this scenario, you created an ML solution from your solution definition. In the Related Links section of your ML solution, see the Solution Statistics, Test Solution, and Solution Definition tabs. On the Solution Statistics tab, review the Point Estimate and Range (prediction interval) statistics your solution has provided.

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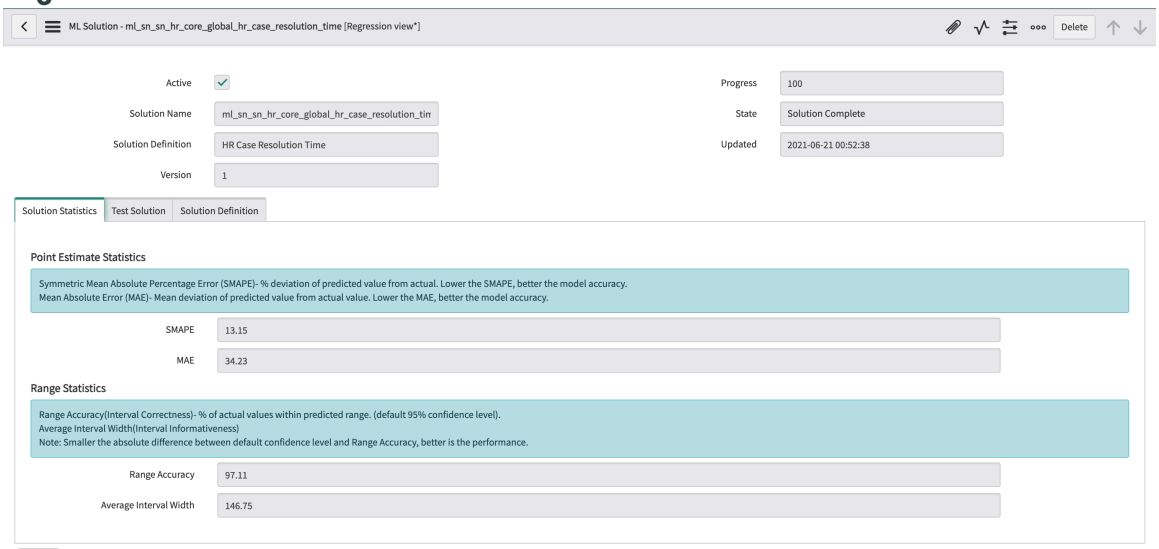
Regression solution definition



On the Test Solutions tab of your solution, you can test the prediction output for the records you used as input to the prediction by entering values for the input fields. You can also use the default prediction confidence level of 95, or enter a different level between 0 and 100. Using 95 as the value means that the system is 95% confident that the actual prediction falls within the prediction interval. Click the **Run Test** button to find the prediction output.

After you run the test, the prediction output statistics appear. The Point Estimate on the screen is a single value at one point in time. When the configuration is complete, the employees and agents see the estimated time to resolve at the request sections.

You can verify the integration status from **HR Administration** > **HR AI Configurations** > **Solution definition**. The use case is now mapped to the selected solution definition.

Related topics

- Predictive Intelligence
- Get started with Predictive Intelligence

Estimated time to resolve HR cases

Determine the Estimated Time to Resolve a Case (ETTR) for a case by analyzing similar closed cases in the past for better visibility and transparency.

Machine learning predicts the estimated time to resolve a case (ETTR) based on attributes of a case such as its short description, category, priority, assignment group, and so on. For more information about configuring the machine learning regression solution definition for ETTR, see HR PIWB template: Recommend estimated time to resolve

To make predictions, you can use the existing ETTR solution definition or change some of the default settings such as the fields, a filter, and the training frequency.

By analyzing the resolution time for similar closed cases in the past, the ETTR capability offers the following benefits:

- Gives employees better transparency and set expectations on resolution time for their cases.
- Helps agents in prioritization of work and measure performance.
- Provides data that can help managers with insights into SLA management and estimated time to resolve for cases.

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ETTR for HR Cases

On configuring Estimated HR Case Resolution Time (ml_sn_sn_hr_core_global_hr_case_resolution_time) and training the predictive model, you can see the **HR Case Resolution Time** option. See the **Estimated time to resolve** value from:

- Employee portal view and Now Mobile view
- Agent workspace
- Platform view with a list of cases
- Case configuration view for admins

For more information, see Viewing ETTR predictions

ETTR predictive model

The Estimated HR Case Resolution Time (ml_sn_sn_hr_core_global_hr_case_resolution_time) is configured and the predictive model is auto trained when all the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed.
- The Predictive Intelligence for Contextual Search (com.snc.contextual_search_ml) plugin is installed.
- The *glide.platform_ml.auto_training.enabled* system property is set to true.

Business rules and system properties

Verify the following system properties and business rules:

- Use or configure the following system properties and corresponding values to display the ETTR values per your requirement:
  - *ml_sn_sn_hr_core.COE_ETTR_display_agent*
  - *ml_sn_sn_hr_core.COE_ETTR_display_employee*
  - *ml_sn_sn_hr_core.estimated_resolution_time_confidence_level*
- Use or configure the **Predict Estimated Resolution Time** business rule per your business needs.

ETTR model

Regression solutions such as ETTR enable you to predict a point estimate and prediction interval. This capability informs the agent, employee, and service owners on the estimated resolution time for a case based on the time taken to resolve similar issues historically.

- **Actual resolution time**: Stores the actual time of resolution of a particular case. This field stores the resolution time from opening to closing of the case.

  Note: When you upgrade, run this **Populate Actual Resolution Time** schedule job once for populating the actual resolution time for existing HR cases. For all upcoming cases, the business rule **Populate Actual Resolution Time** automatically generates the resolution time.

- **Max ETTR**: Indicates the maximum estimated resolution time in days for case completion. Estimate is based on the time taken for resolving similar HR cases.
- **Min ETTR**: Indicates the minimum estimated resolution time in days for case completion. Estimate is based on the time taken for resolving similar HR cases.
- **ETTR in days**: Stores the point estimated resolution time in days for case completion.

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Related topics

Viewing ETTR predictions

Viewing ETTR predictions

View the examples of ETTR views across the journey of a case which indicates the estimated time to resolve based on the historical data.

Once you configure ETTR, you can see the **HR Case Resolution Time** option. See the **Estimated time to resolve** value from:

- Employee portal view

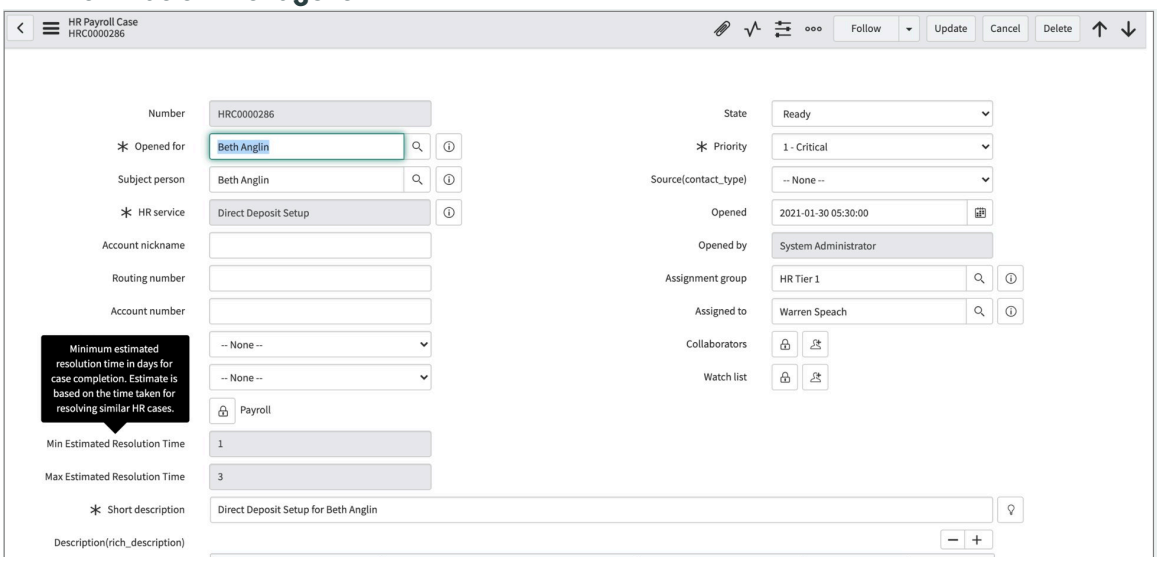
  ETTR for employee

- Now Mobile view

  ETTR on Now Mobile

- Platform view for agent

  ETTR on Platform for agent



- Agent workspace

  ETTR on agent workspace

Based on the configuration, the views may be different for your implementation.

Related topics

Estimated time to resolve HR cases

ServiceNow Voice for HR Service Delivery

The ServiceNow Voice for HR Agent Workspace provides seamless interactive voice response (IVR) and calling experiences for your employees and agents by integrating a cloud contact center provider with the robust capabilities of the Agent Workspace for HR Case Management.

Use ServiceNow Voice to facilitate inbound and outbound telephone calls for service agents.

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- Integrate your ServiceNow instance with a third-party phone system, such as Amazon Connect.
- Display relevant data to assist the HR agent during the call.
- Analyze interactions between HR agents and employees via call recordings, metrics, and transcripts.

For more information, see Integrating ServiceNow Voice for HR.

Employee Center with HR Service Delivery

The Employee Center is available to use when you activate the Human Resources Scoped App: Core [com.sn_hr_core] plugin.

The Employee Center provides a single and unified portal experience for employees to find information, get help, and request services or items they need. For more information, see Employee Center.

Unified taxonomy mappings

HR taxonomy delivers pre-configured mappings of the HR catalog items and knowledge articles to the HR topics provided by the Employee Experience taxonomy.

Your employees can discover content of different types such as catalog and knowledge together within a single topic. The topic mappings for the HR taxonomy also powers the search in the Employee Center.

To use the Employee Center with HR Service Delivery:

- Activate the HR taxonomy (com.sn_hr_emp_taxonomy) plugin. When activated, the HR catalog items and knowledge (KB) articles are mapped to the topics and subtopics under Taxonomy.
- The base system provides the HR topics and subtopics and are included when you activate the HR taxonomy (com.sn_hr_emp_taxonomy) plugin.

Note: For more information, see:

- Unified taxonomy for Employee Center
- Associate connected content to a topic
- Associate a knowledge article with a taxonomy category

Employee Center widgets

The following are optional widgets that can be configured:

- Start Date widget: This widget only appears to new hires prior to their start date for onboarding cases only. When using the base system layout, place the widget on the Employee Center home page, in the right-hand pane above the My Items widget. For more information on Lifecycle Events and onboarding and configuring the widget, see
  - Lifecyle events for enterprise
  - Service Portal widgets
- Parental Leave Guide: Provides a link to the Parental Leave Guide portal page. For more information, see
  - Now Assist Virtual Agent topics for Journey designer
  - Service Portal widgets

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Domain Separation and HR Service Delivery

The ServiceNow® HR Service Delivery application improves the employee service experience by automating HR interactions and providing a single platform for all HR services. Domain separation is supported in HR Service Delivery.

Domain separation separates data, processes, and administrative tasks into logical groupings called domains within a single ServiceNow instance. You can then control several aspects of this separation, including which users can see and access data.

To learn more about domain separation, see:

- KB article
- Understanding domain separation

HR Service Delivery provides the basic level of domain separation support. Basic domain separation (data separation) implies that if the data and all the related configurations reside within a particular domain, HR Service Delivery will function as expected. Hierarchical domain structure, sharing of data/configurations and logic/process separation is not supported by default in HR Service Delivery as per the basic domain separation definition.

Support level: Basic

Note: To learn more about support levels, see Domain separation levels of support.

- There is business logic to ensure data goes into the proper domain for the application's service provider use cases.
- In the application, the user interface, cache keys, reporting, rollups, aggregations, and so on, all consider domain at run time.
- The owner of the instance needs to be able to set up the application to function normally across multiple tenants.

Use case: As a Service Provider organization, when I receive a case or a chat from a tenant in the system, I should be able to see and resolve that case without other tenant customers being aware of the case or process.

Overview of HRSD domain separation

Domain separation is best for customers who:

- Enforce absolute data segregation between business entities (data separation).
- Customize business process definitions and user interfaces for each domain (delegated administration).
- Maintain some global processes and global reporting in a single instance.

These users can choose to expand or collapse the domain scope to show or hide data from other domains. For example, data from Company A can be separated from the data of Company B and Company C. Each domain using the HR Service Delivery application can have separate data that cannot be shared with other domains.

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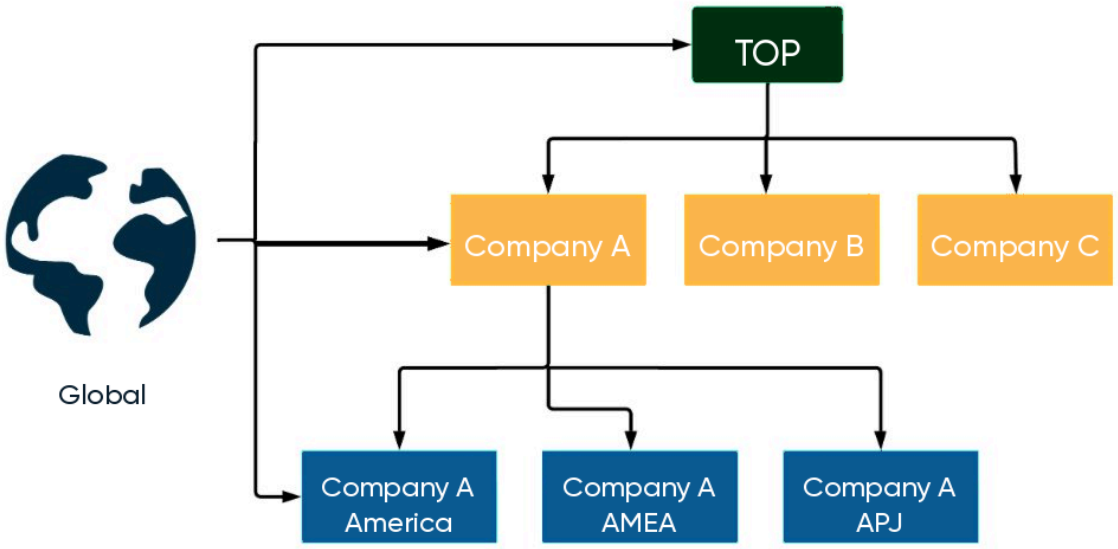
Note: Based on the hierarchy, users can see data in their home domain and child domains of that home domain. Users will not have access to data in their parent domains, peer domains, or domains in other branches of the hierarchy. Users always have access to data from domains that have been explicitly granted to them by domain visibility and domain contains.



How domain separation works in HR Service Delivery

- While HR Service Delivery supports separation of data, separation of logic and process is not fully supported.

  Note:

  - For more details on domain separation in HR Service delivery, see Guidance for proper HR Service Delivery domain separation.
  - To learn more about process separation, see the Data Separation versus Process Separation section in this KB article.

- When working in a domain-separated implementation, ensure that records are created at the right domain level so that it is visible to the right set of users.

  For example, domains that look like:

  - Global → TOP
    - Domain A
    - Domain B

    Note: Global is not a domain.

    When agents are shared across domains, agents should reside in global and have access to the remote HR cases of all onboarded consumers.

  - For any user in Domain A or Domain B to access an HR case, the HR case must be created at an global level.

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- If an HR case is created in Domain A, a user from Domain B cannot access it. Likewise, if an HR case is created in Domain B, a user from Domain A cannot access it.
- For an HR case to be visible to the users in TOP and Domain A, create the HR case in Domain A.
- For an HR case to be visible to the users in TOP and Domain B, create the HR case in Domain B.

Use case: Domain separation in HR Service Delivery

While the behavior offered with domain separation provides multi-tenancy support, multi-tenancy is still contained within a single instance. A few properties, data and processes are always global and shared across all domains. For example, the system's "Remember me" option on the login page is global and cannot be specified per domain.

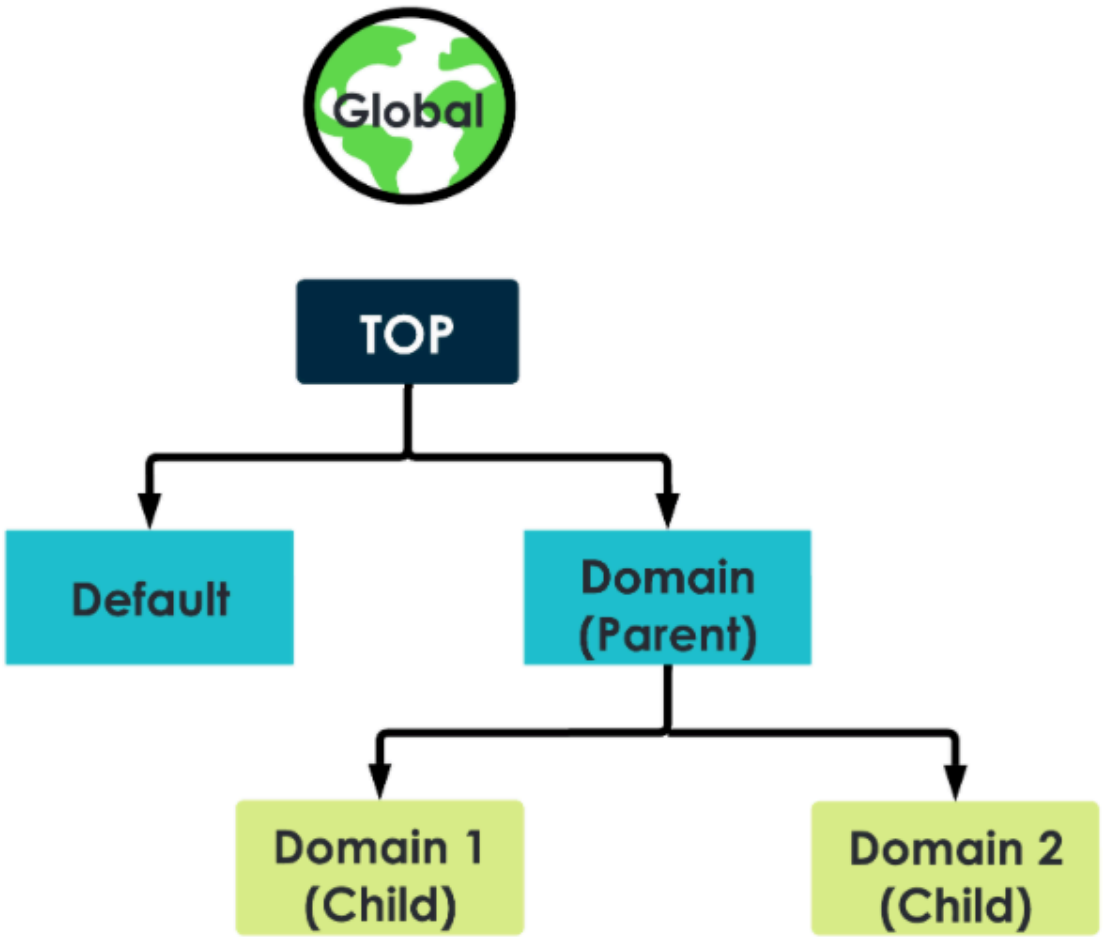
If a complete and total separation of all system properties is needed and does not require global reporting or global processes, separate instances are the best option.

Guidance for proper HR Service Delivery domain separation

Additional guidance to successfully deploy HR Service Delivery in a domain separated environment.

The following sections explain how to successfully set up domain separation on your instance.

Example of a domain separation hierarchy



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HR Services

While you set up HR services in a global domain, note the following points:

Limitations

1. Administrator of any domain can edit the global HR services, which impacts all other domains.
2. An HR service that is created in a global domain will be present in all others domains.

Instructions

- This instruction applies to the first limitation: You can create or update write ACL on an HR service table so that the global HR services are only editable by HR admins in a global domain.
- This instruction applies to the second limitation: By using HR criteria, you can restrict global HR services to be used for certain domains only. However, this will not stop access for an global service to view and modify the global HR service by HR administrators.

HR Approvals

While you set up HR approvals for domain separation, note the following points:

Limitations

When the users of parent domain and child domain are added to same approval group:

- The parent domain's HR case is going for approval to a child domain even when the users of the child domain do not have access to the case. For example, the HR case in Domain (Parent) is going for approval to Domain 1 and Domain 2 users even when they do not have access to the case (Refer to the domain hierarchy image).
- The child domain's HR case is not going for approval to the parent domain even when the users of parent domain have access to the case. For example, the HR case in Domain 1 is not going for approval to users in Domain (Parent) even when they have access to the case.

Instructions

Do not use global groups or groups in a parent domain for approvals. While using these groups for approval, verify that you use a flat domain hierarchy, otherwise use domain specific approval groups.

HR Assignment rules

While you set up HR assignment rules for domain separation, note the following points:

Limitations

When the users of parent domain and child domain are added to same approval group:

- The parent domain's HR case might be assigned to a child domain even when the users of the child domain do not have access to the case. For example, the HR case in Domain (Parent) might be assigned to Domain 1 and Domain 2 users even when they do not have access to the case (Refer to the domain hierarchy image).

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- The child domain's HR case might not be assigned to the parent domain even when the users of parent domain have access to the case. For example, the HR case in Domain 1might not go for approval to Domain (Parent) users even when they have access to the case.

Instructions

- For an assignment rule in a domain, use group from the same domain.
- While using global groups for an assignment, use a flat domain hierarchy, otherwise use the domain specific assignment groups.

HR Assignment group

While you set up HR assignment groups for domain separation, note the following:

Limitation

For an HR case that is created in parent domain, assignment group from child domain can be selected. For example, for an HR case in Domain (Parent), user can select an assignment group from Domain 1.

Instructions

Select the correct assignment group for a parent domain. Do not select an assignment group from a child domain.

HR SLAs

While you set up HR SLAs for domain separation, note the following points:

As an administrator:

- Set up domain specific SLA as per your requirement.
- Set up global SLA definition if all domains require the same SLA definition.

HR Response templates

While you set up HR response templates for domain separation, note the following points:

You can set up response templates with either global or a specific domain. Global templates will be accessible to all other domains, while a specific domain template will be accessible to that domain only.

Advanced Work Assignment (AWA) for HR

While you set up HR live agent chat (AWA) for domain separation, note the following points:

Limitations

When you have AWA set up with a global group, users from a specific domain are getting the **Connect to the live agent** option even when an agent from that domain is not available. For example, if available agents are only from Domain 1 and user from Domain 2 tries to connect to the live agent, user will get option to **Connect to a live agent**, but the actual routing to any agent will not happen.

Instructions

AWA can be set up for both global or domain specific groups. If you are using global group for AWA setup, verify at least one of the global agent is always available.

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Escalation rules

While you set up escalation rules for domain separation, note the following point:

Set up escalation rules either at global or a domain specific layer. For an escalation rule in parent domain, do not select a group from child domains.

Enterprise Service Management Integrations Framework

While you set up Enterprise Service Management Integrations Framework for domain separation, note the following points:

- Maintain a separate connection record per domain.
- Copy the default scheduled flow in to respective domain for each integrations.
- Copy default Trigger external interface flow into respective domain.

Issue Auto Resolution for HR

The Issue Auto Resolution for HR application uses artificial intelligence (AI) to provide near real-time responses to your employee's routine inquiries. When your employees use the request and response channels, you can collect their feedback to improve the quality of the recommendations.

By using the Issue Auto Resolution for HR application, your employees can ask for help through the request channels. They can then receive resolutions for their requests through the response channels. The Issue Auto Resolution application also identifies the cases that are critical or sensitive and brings them to an agent's attention for timely assistance.

The key benefits of using the Issue Auto Resolution application are:

- Auto-resolutions to your employee's questions.
- Omni-channel or multichannel experience so that your employees have multiple channels to request and receive help.
- Cost savings through self-service because you don’t require as many agents to answer questions.
- Near real-time responses for your employees.
- Dashboard that your agents and managers can use to monitor the success metrics.

⚠ **Warning:** Issue Auto Resolution for HR is supported only in the English language and does not support bringing in your own model.

HR case auto-resolution that is powered by AI

For high-volume, non-critical cases, the Issue Auto Resolution application gives near real time self-service options through the response channels that the employee would like to engage with. The Issue Auto Resolution application can detect which cases are critical and bring them to your agents' attention, which ensures that the employee gets timely assistance.

Omni-channel or multichannel experience

The omni-channel or multichannel experience enables employees to ask for help through the channel that is most convenient to them so that they can receive a near real-time response in their preferred channels. For example, a routine general inquiry that is received through an email can be auto-resolved through a short message/messaging service (SMS) for remote workers or

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Microsoft Teams for those employees who go into the office. Your employees decide how they want their responses.

Cost savings for the organization

Nearly 50–80 percent of employee requests are submitted through an unstructured format because employees often prefer the easiest and fastest route to ask for help. Most of these requests are routine or non-critical. By using the Issue Auto Resolution application, you can automate the resolution of high-volume, low-value HR cases. This automation reduces the cost and effort of manually sorting and solving routine cases.

Near real-time response

The Issue Auto Resolution application gives a near real-time response (often 3–5 seconds) for routine employee inquiries. Employees don't have to wait 3–5 days for an agent to get back to them to address their inquiries.

Dashboard for monitoring your success metrics

The Issue Auto Resolution dashboard lets your administrators monitor your dashboard's success metrics. These metrics can provide you with the details of the auto-resolved cases, estimated costs, and time savings through Issue Auto Resolution.

Explore



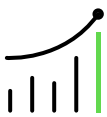
Learn how employees use the request channels and get help through their preferred response channels with Issue Auto Resolution.

Use



Process how HR cases and feedback are handled by Issue Auto Resolution.

Platform Analytics Solution



Monitor the success metrics of Issue Auto Resolution based on the application's case resolution performance

Configure



Learn about Issue Auto Resolution implementation

Exploring Issue Auto Resolution for HR

Issue Auto Resolution for HR enables employees to use request channels and response channels for communication and collects feedback from them to improve the quality of the recommendations.

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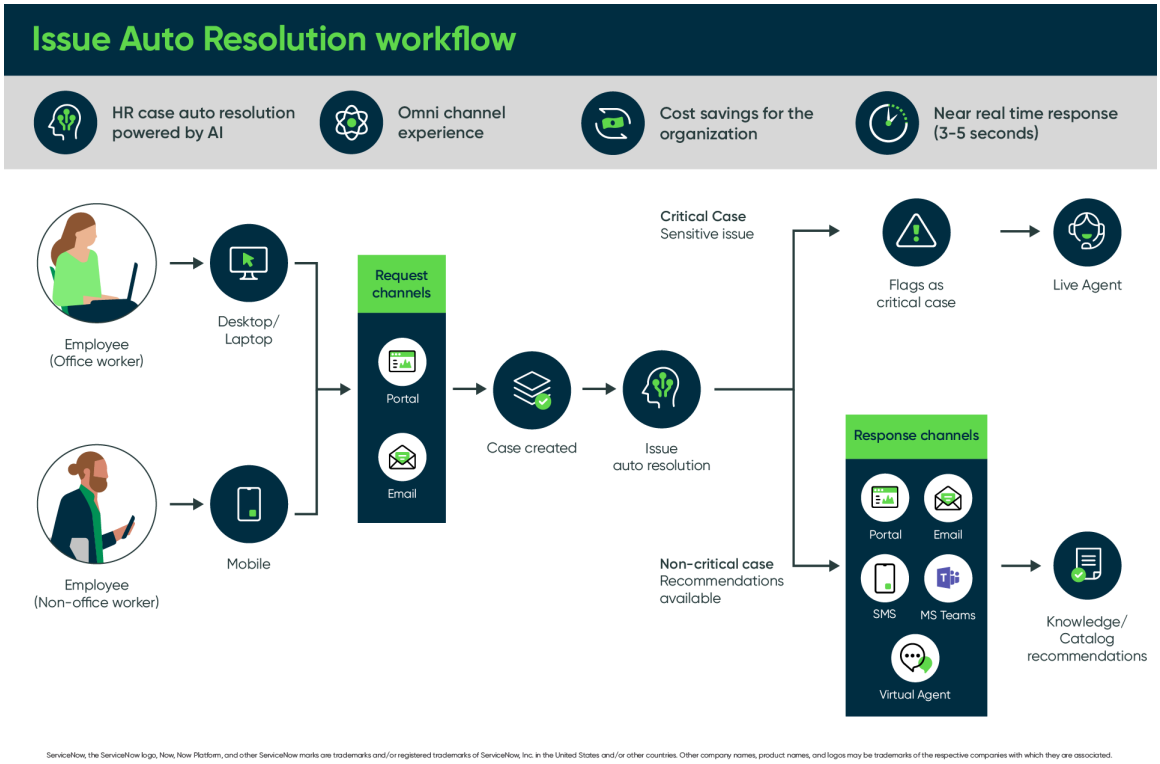

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Issue Auto Resolution for HR makes asking and receiving help easy for all employees. Office workers, with access to channels can ask help via a desktop or a laptop. Non-office workers, with limited access to computers, can ask help through a mobile phone. Issue Auto Resolution for HR provides a full self-service path toward resolving employee requests across a broad array of channels using AI and automation.

Request and response channels

Employees can request help or create a case using request channels like email or Employee Portal.

Employees receive communication from Issue Auto Resolution through response channels. If an HR case is evaluated as non-critical, and self-service content is available, Issue Auto Resolution sends a suggestion through the employee's preferred response channel. Employees can receive assistance through channels like email, SMS, Employee Portal, Microsoft Teams, or Virtual Agent (web). Providing diverse response channels enables employees to receive communication from Issue Auto Resolution through their preferred communication medium.

How Issue Auto Resolution works

After a general inquiry is created, Issue Auto Resolution uses Artificial Intelligence (AI), and Natural Language Understanding (NLU) to interpret the tone and intent of the case. AI analyzes the description of the HR case and identifies its criticality. Critical cases are flagged to a live agent for timely assistance. For non-critical cases, IAR responds with relevant knowledge articles and catalog items for reference. During the process of case resolution, employees can request agent assistance at any given point.

Understanding feedback

After reviewing the recommended knowledge articles or catalog items, an employee can choose to indicate whether the knowledge articles, and catalog items are helpful in resolving the

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inquiry. If the recommendations are helpful, the case is auto-resolved without any manual agent intervention. Otherwise, the case is moved to an agent's queue for further assistance.

Critical cases are brought to an agent's attention and the assigned agent can give feedback on the prediction. The feedback can be used for training the machine-learning models so that the application gets smarter with time.

Enhanced AI Search assist for general HR inquiries

Refine your search results with the enhanced AI Search assist capability available on Employee Center. Self-solve minor issues with intuitive recommendations before submitting a create incident form.

Use the enhanced search functionality providing relevant recommendations to self-solve your issue while filling in an incident creation form. The contextual search understands long form texts to provide intuitive suggestions. You can attempt to solve your problem with the suggestive resources before you create an incident.

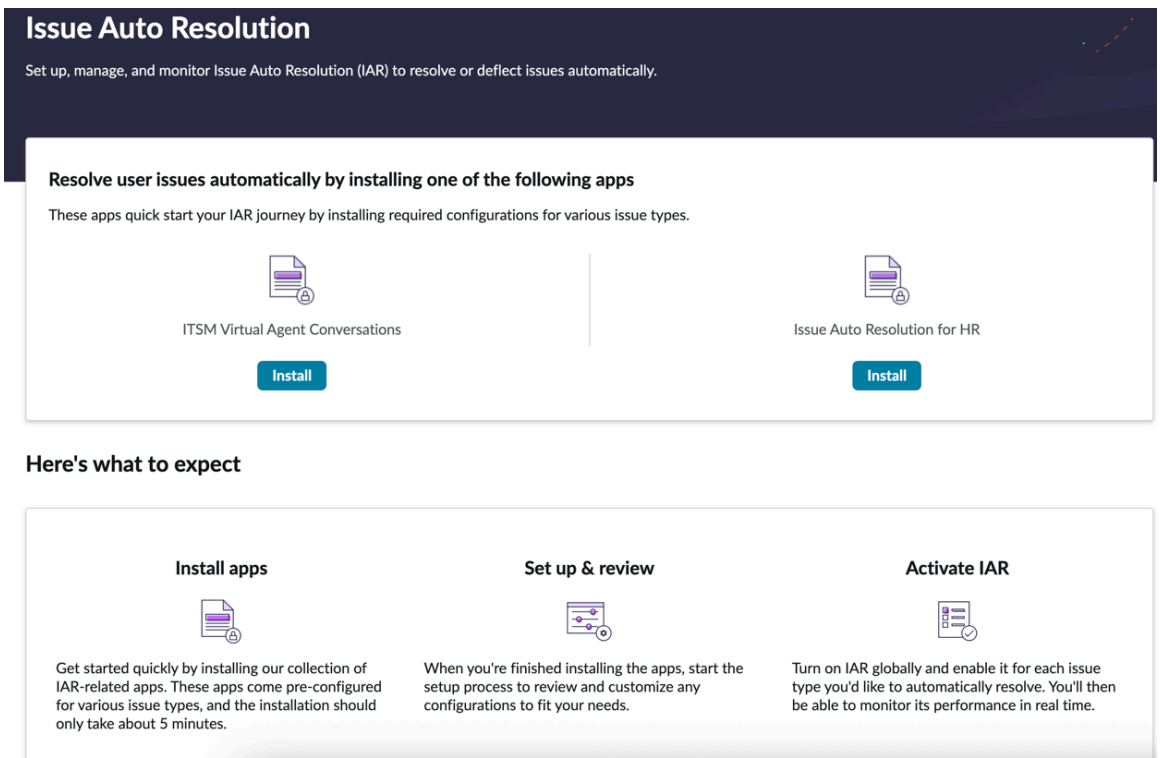
You can find both Service Catalog items and Knowledge Base articles as recommendations for your search.

The feature is available with the Australia release and onwards.

For more information on how to configure the enhanced AI Search assist functionality, see Configure AI Search Assist for a record producer.

Configuring Issue Auto Resolution for HR

Setting up Issue Auto Resolution helps your organization to provide near real-time responses to your employee's routine inquiries. To view the settings for Issue Auto Resolution, navigate to **All** > **Issue Auto Resolution** > **Settings**.



You can install the ITSM Virtual Agent Conversations and Issue Auto Resolution applications. After the installation is complete, review and modify the configurations to suit your business needs and activate your IAR.

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Note: You can also install the apps from the ServiceNow Store

Using Issue Auto Resolution for HR to handle cases

You can use the Issue Auto Resolution for HR application to quickly handle your organization's high-volume, low-value HR cases and reduce the burden on your agents so that they can focus on issues that need more experience or manual assistance.

Overview of Issue Auto Resolution for HR

By providing your employees with self-service content for their routine inquiries through the Issue Auto Resolution for the HR application, you can help resolve your HR cases faster. Without the Issue Auto Resolution for HR application, your agents would take at least 3–5 days to resolve these cases.

The following two scenarios show how you can use the Issue Auto Resolution application in your organization.

Scenario 1 - Successful catalog submission

Let's say that an employee recently joined your organization. The employee doesn't have a company laptop. The main method for work-related requests are through the company's support email address. The employee owns a personal mobile phone, which is the employee's preferred mode of communication.

The following example shows how a new employee can use a personal mobile phone to raise a healthcare-related request.

Employee inquiring about healthcare benefits

1. The employee submits an HR general inquiry through an email from the employee's own mobile device.
2. The employee receives an SMS notification with recommendations that are related to the inquiry.
3. The employee clicks the link in the SMS message and logs in to the Employee Portal to view the recommendations.
4. The employee goes through all the recommendations, fills out the request form and catalog item, and submits the form.
5. A new structured case is created. The original case is closed automatically.

Note: If the employee isn't satisfied with the resolution, the employee can choose to connect with an agent for further assistance.

The employee gets a follow-up SMS regarding the feedback on the original inquiry. Within minutes, the issue is resolved through the channels that the employee is familiar with. No agent was needed for this scenario.

Scenario 2 - Helpful knowledge article

Let's say that an employee recently joined your organization as a program manager and is assigned a company laptop. The employee spends most of the time in meetings or communicating with various stakeholders through emails and Microsoft Teams. The employee prefers reaching out through these channels when a question arises.

The following example shows how a new employee can use a company laptop to raise a healthcare-related request.

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Inquiring about healthcare benefits through email

1. The employee submits a HR general inquiry through an email via a desktop computer.
2. The employee logs in to Microsoft Teams and is greeted by the Issue Auto Resolution virtual assistance.

   The employee views the knowledge base articles that are recommended by the Issue Auto Resolution for HR application and is satisfied with the information, but later forgets about the open case.
3. The Issue Auto Resolution application tracks that the employee viewed some of the recommendations but hasn't responded to the case. The next day, the employee gets a follow-up message in Microsoft Teams to request feedback.
4. The employee responds with positive feedback and a case closure consent. The case gets automatically closed.

Within a day, the issue is resolved through the employee's preferred channels. No agent was needed for this scenario.

Simplifying the authentication experience for your remote employees

With the Issue Auto Resolution application, you can simplify the authentication experience for your remote employees. Instead of entering a user name and password to access the service portal, your remote employees can get to the portal through a link in a short messaging service (SMS) or email.

By using the Issue Auto Resolution application, your remote employees who don't have the corporate credentials can still access your service portal without entering a user name and password. When you create a case for the employee, that employee gets a link through a text (SMS) or email. That link directs them to the login page where they're prompted to enter a user name and password. With this simplified authentication experience feature, these employees, who fulfill the user criteria mentioned in the *sn_iar_hr.digest_link_user_criteria* system property, can access the portal without entering credentials.

You can install the Time Limited Authentication (com.snc.authenticate.time_limited_authentication) plugin to extend the core functionality of the Issue Auto Resolution application.

Successful and simplified login experience

Let's say that a remote employee recently joined your organization. Your employee doesn't have the corporate credentials to access the service portal but that employee has a query about the dental benefits enrollment. With the Issue Auto Resolution application, your employee can access the service portal through an email by using a personal device.

The following example shows how a remote employee can log in to the portal without credentials by using a digest link.

Simplified log in experience for remote workers

The process is as follows:

1. The remote employee gets the digest link through an email.
2. The link directs the employee to verify the identity page, where the employee has to enter a one-time password (OTP) received through an email.
3. The employee is then directed to the standard ticket page, where the employee can view the recommendations.

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Note: The link's validity depends on the values that are defined in the time-limited authentication configuration record. In this case, the maximum number of times an employee can use the link is set to one.

4. The employee is redirected to the expired link page when the employee tries to use the same link again.
5. The employee gets an email with a new digest link.

Time-limited authentication

You can do the following tasks to set the existing time-limited authentication properties:

- Enable the time-limited authentication glide.authenticate.enable.time_limited_authentication property.
- Disable the account recovery property.
- Enable multi-provider single sign-on (SSO).
- Enable the **Active** field in the time limited authentication properties config record.

To learn how to configure the properties, see Time Limited Authentication Properties form.

To learn more about time-limited authentication, see Time limited authentication.

User criteria for generating the digest link

You can use the sn_iar_hr.digest_link_user_criteria system property to get and validate the user criteria for generating the digest link. This link appears in an SMS or email that is sent to the employee. The value should be the sys_id of the active user criteria. For more information, see User criteria form.

Users with the admin and sn_hr_core.admin roles can assign the sn_iar_hr.digest_link_user role. This role is added to the available user criteria to validate if that user qualifies for digest link generation.

Time Limited Authentication Properties form

Use the Issue Auto Resolution time-limited authentication record to set the fields that are related to the link's validity, expiry, and failed redirect.

Time Limited Authentication Properties form

Field	Description
Name	Name of the record.
One time use	Maximum number of times that a user can log in.
Active	Option to enable the time limited authentication property. **Note:** Select this option to activate the property.
Expiry field	Expiry in minutes. The minimum is 30. The maximum is 1440.

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Time Limited Authentication Properties form (continued)

Field	Description
	Note: The maximum login attempts are changed to one when expiry is more than 120 min.
Maximum login attempts	Maximum number of times that can be used log in.
Failed redirect	URL to redirect your users after a failed login attempt. An example of this type of URL is a public knowledge article that describes the error and has helpful links. Another example is an internal company URL (e.g. http://portal.companya.com/logout). **Note:** You must change the base link with the instance base link.
External logout redirect	URL to redirect your users after logout, typically back to the portal that enabled the single sign-on (SSO) (e.g. http://portal.companya.com/logout). **Note:** Change the link in the example to match your instance base link.

Using agent feedback to improve your case criticality predictions

By using your agent's feedback to determine how critical a case is, you can improve the machine learning (ML) models of the Issue Auto Resolution (IAR) application to predict cases more correctly over time.

When an agent creates a case, Issue Auto Resolution predicts how critical the issue is. However, in the past, these predictions sometimes needed to be improved. To improve the classification of cases through machine learning (ML) models, a new field, called the **Resolution requires** field, was introduced for HR agents to give feedback. Agents can only see this field on an HR case form when Issue Auto Resolution has predicted the criticality of that case.

Using the resolution requires field

The **Resolution requires** field includes the values that are based on the feedback that the HR agents gave on the criticality prediction. The **Resolution requires** field includes the options that are listed in the following table.

Resolution requires field values

Name	Description
Urgent agent action	Immediate agent attention is required to resolve the case.
Self-service content only	User could resolve the case with self-service content.

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Resolution requires field values (continued)

Name	Description
Nonurgent agent action	Case is noncritical.

Agents can choose the correct feedback from the field options to tell when the Issue Auto Resolution predictions are correct or not.

Resolution priority mapping

Agents see an informational message on the screen when they change the resolution requires, priority, or state of the case. For example, let's say that an agent selects the **Urgent agent action** option. The priority of it being selected is **Low**, so the agent sees the message "Resolution requires field is inconsistent with case priority. Please review." By using resolution priority mapping, agents can correct the issue when the priority is inconsistent with the urgency of the case.

Informational messages can also appear as priority changes. The resolution requires that an agent makes changes or state changes.

Enhanced search results in IAR with Virtual Agent

The Issue Auto Resolution application for HR has enhanced its search results with the introduction of Virtual Agent to the IAR pipeline flow. The employee can now receive a matching Virtual Agent topic as a recommendation for a noncritical case, when the topic is available in the database, before the application performs a general AI search.

In the previous version of Issue Auto Resolution for HR, all the noncritical HR cases were sent recommendations that were based only on the AI search results. With this enhanced version, the IAR application first checks if a matching Virtual Agent topic is available for that particular HR case. If there's a matching Virtual Agent topic, the IAR application recommends the identified Virtual Agent topic to the employee. If no matching Virtual Agent topic is found, the application performs an AI search, and the recommendations are sent to the employee based on the AI search results.

Note: To enable the Virtual Agent topic recommendation in the Issue Auto Resolution for HR, the administrator must set the sn_iar_hr.hr_intent_solution_enable property to true. The ServiceNow® support team can update this feature to your Issue Auto Resolution flow.

Virtual Agent topic flow

When an employee submits a human resource (HR) case via an email or portal, the Issue Auto Resolution first checks whether the *sn_iar_hr.hr_intent_solution_enable* property value is set to **True**. If the property value is **True**, the Issue Auto Resolution checks if the corresponding intent for the topic map is active or not in the **Auto-resolution configuration** record. When the property value is **False**, then Issue Auto Resolution continues to perform the normal AI search.

The following example shows how an employee receives a Virtual Agent topic recommendation when the employee submits an HR case via email.

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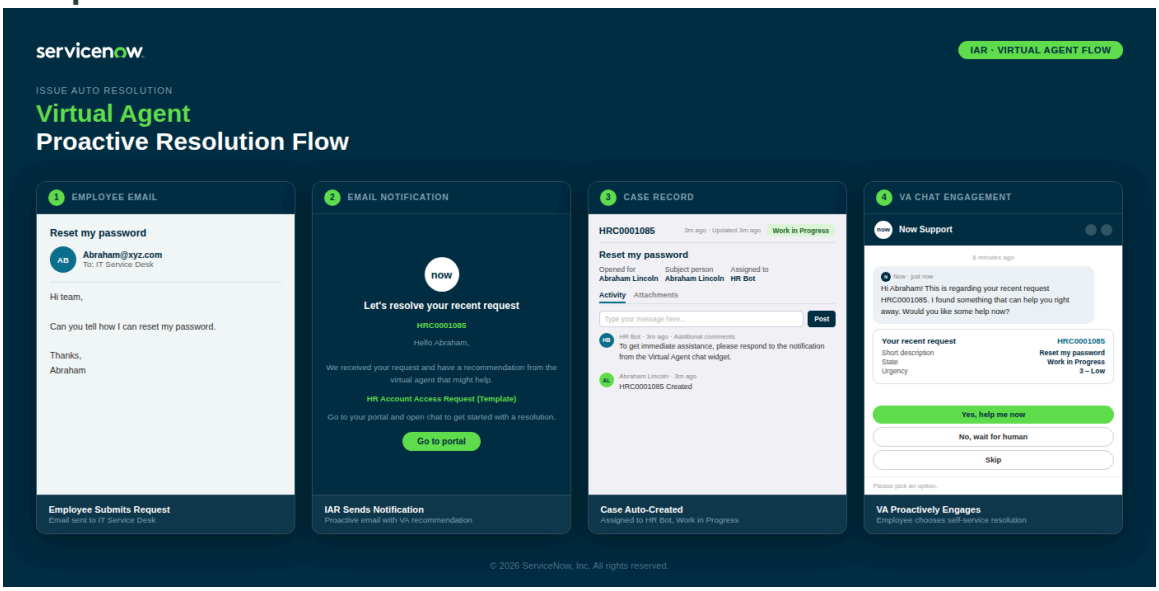
VA topic in Issue Auto Resolution flow



The process is as follows:

1. An HR case is submitted by the employee through an email.
2. The employee receives an email with the Virtual Agent topic recommendation in it.
3. The employee selects **Go to portal** to access the details of the case on the portal.
4. The employee accesses the Virtual Agent topic, by selecting the Virtual Agent chat icon on the portal and selecting the case recommendation notification.

Enhanced recommendations preview on email for AI search flow

The new recommendations section displays the titles of the knowledge articles and catalog items in the email. The icon indicates that the recommendation title is a catalog item. The icon indicates that the recommendation title is a knowledge article.

The following example shows how the new recommendations preview section looks in the email you receive when the HR case gets AI search results as recommendations.

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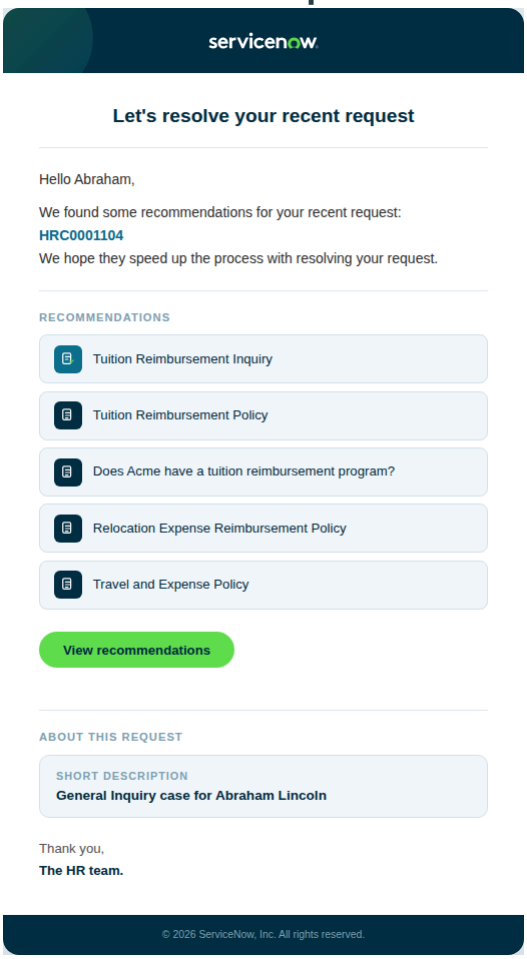
New recommendations preview on email



Issue Auto Resolution for HR dashboard

With the Issue Auto Resolution for HR dashboard, you can see a graphical representation of the Issue Auto Resolution application's case resolution performance. You can also monitor the success metrics for auto-resolved cases, estimated costs, and time saved by using the application.

Dashboard overview

The dashboard shows you a near real-time window into the application's case resolution performance of identifying and auto-resolving noncritical cases.

The following example shows the viewing perspective of the dashboard.

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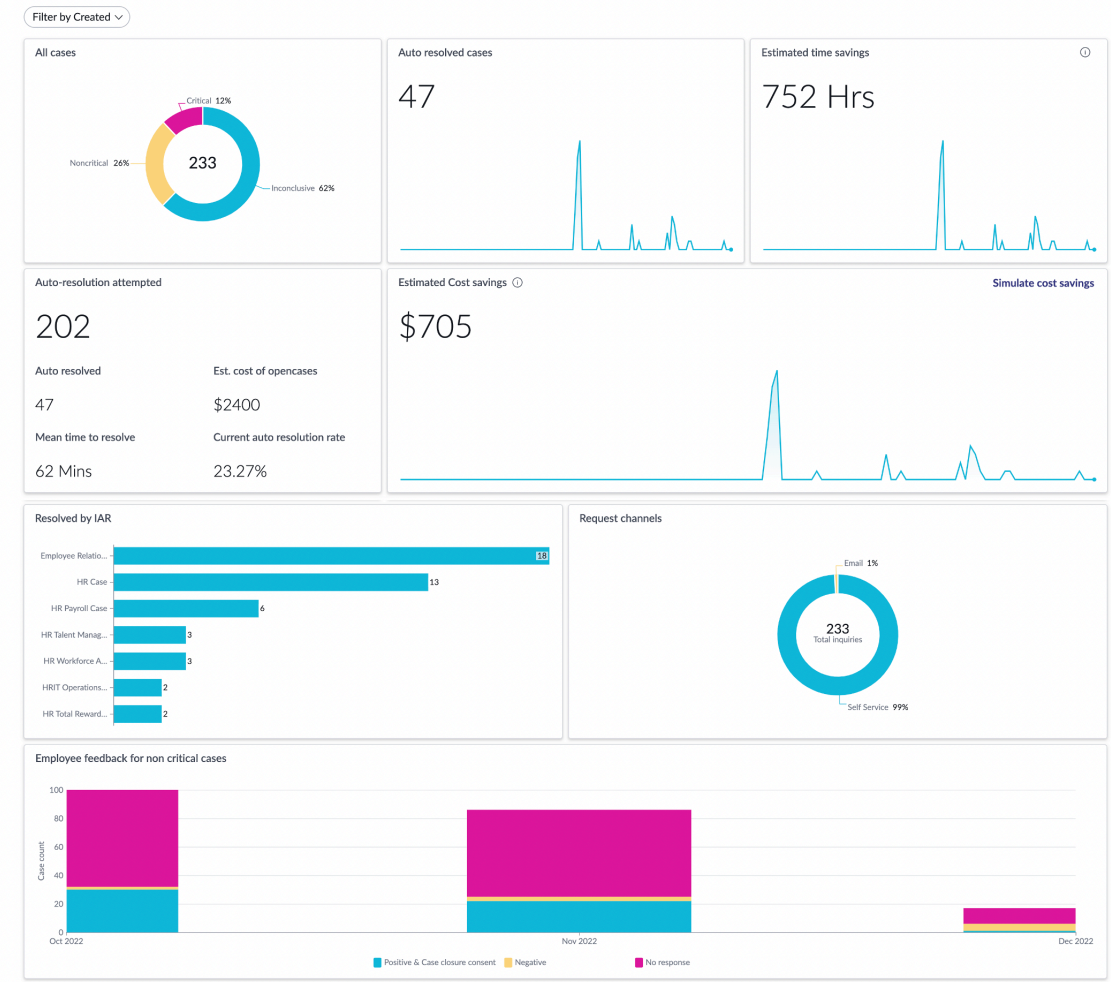
Dashboard user interface



Reports and indicators

The following table shows the reports and indicators that you use to track and monitor the application's performance.

Graph type and description

Graph title	Type	Description
All cases	Donut	Total number of general inquiries that the employees raised. **Note:** The data points for this report are predicted by the underlying Machine Learning (ML) solution and differ from the Non critical cases report.
Auto resolved (noncritical cases)	Single Score	Issue Auto Resolution application responded

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Graph type and description (continued)

Graph title	Type	Description
		to cases with self-service content as recommendations.
Estimated time savings	Single Score	Total hours you saved by using the Issue Auto Resolution application.
Estimated cost savings	Single Score	Estimated costs for resolving the open cases (open cases multiplied by the average level/tier 1 cost per case).
Simulate cost savings	Single Score	Estimates your cost savings.
Estimated cost of open cases	Single Score	Estimated monetary value your organization must spend to resolve open cases.
Mean time to resolve	Single Score	Average time to resolve cases that were predicted as non-critical cases. **Note:** Case resolution time depends on the employee's feedback and service level agreements (SLAs).
Current auto resolution rate	Single Score	Number of cases that were auto-resolved from the total number of cases that were predicted as non critical.
Auto-resolution attempted	Single Score	Total number of cases for which deflection is attempted cases that passed through the AI prediction.
Resolved by IAR	Horizontal Bar	Number of cases auto-resolved through the Issue Auto Resolution application for each HR center of excellence (COE).
Request channels	Donut	Percentage of general inquiries that were received through request channels.
Employee feedback for non critical cases	Vertical Bar	Employee feedback pattern for all non-critical cases for the Issue Auto Resolution application.

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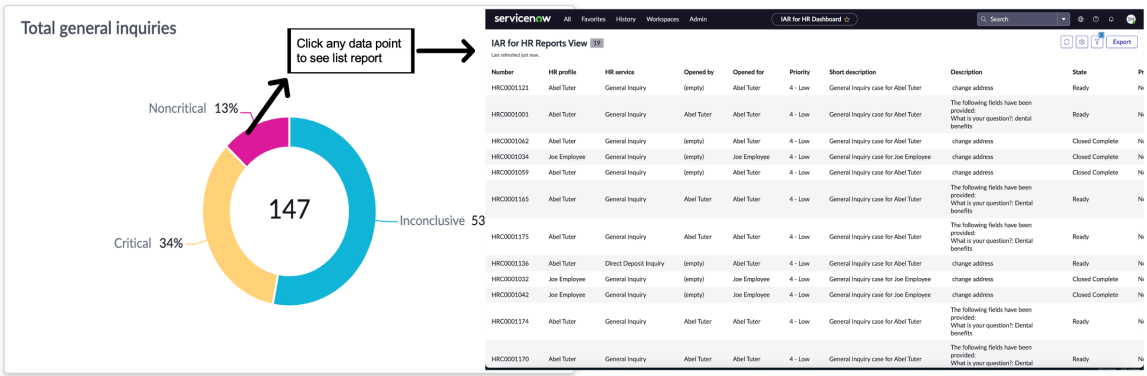
Detailed report view

Each dashboard report is related to a data source (table or indicator). Select each data point in a report to see the detailed list of data.

The following example shows how selecting any data point on the dashboard gives you the complete list report.

Viewing list report



Dashboard filters

Use the dashboard filter to get the results that are based on a selected date range.

The following example shows what the date filter option looks like in the dashboard.

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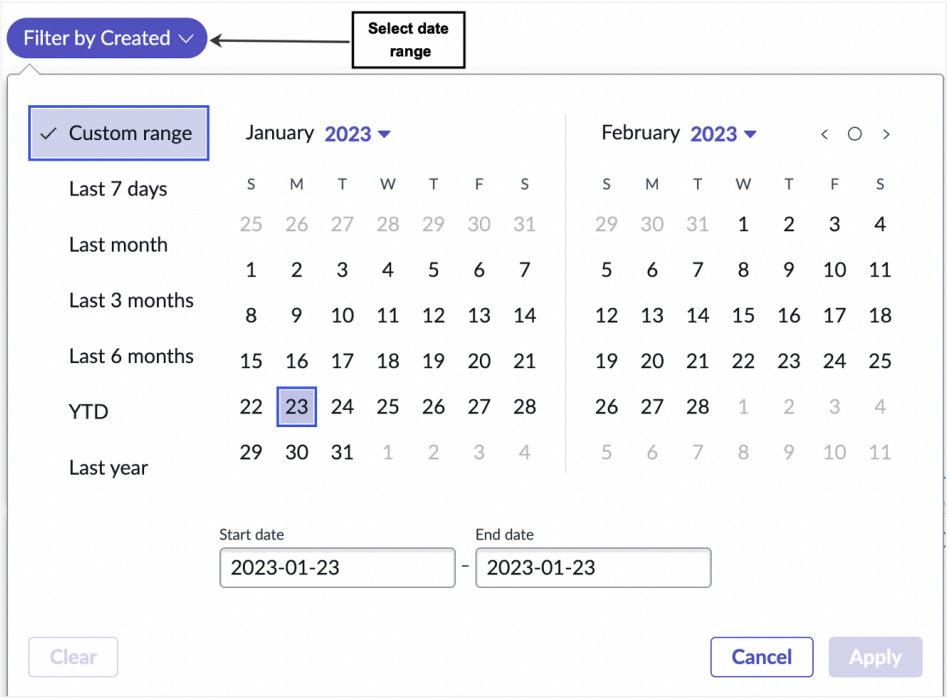
Viewing date filters



Quick start tests for HR Service Delivery

Validate the continued functionality of HR Service Delivery after any configuration change such as an upgrade or after developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

All test suites and tests should pass on a default implementation. To validate a custom implementation, copy the automated tests and configure them for your customizations.

Quick start tests are disabled and read-only test templates. By default, they only produce a pass result when you run them with the default demo data that is provided with the application or feature plugin.

To make quick start tests produce a pass result when you run them with your instance-specific data, copy and configure them to use your instance data.

The Agile Development 2.0 plugin (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests (com.snc.sdlc.agile.2.0.atf) plugins must be enabled.

Note: When running, demo data is required.

Employee Document Management

Employee Document Management quick start tests require activating the Employee Document Management (com.sn_employee_document_management) plugin.

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Employee Document Management

Test	Description	Release version
EDM: Create retention period with day offset	Creates a retention period with a one (1) day offset and verifies the calculation period in a retention policy.	Rome

HR Service Delivery case tests

Test	Description	Release version
Case Creation Configuration	Validates an HR service has a case creation configuration and is populated into the HR case form when creating an HR case for that HR service.	Yokohama
Create Document template block and block content	Verifies a document template block and document template content are created for block content.	Yokohama
Create HR Employee Document	Creates an employee document and ensures the Attachment [sys_attachment] table points back to the record in the Employee Document [sn_hr_ef_employee_document] table. Verifies that the employee document is accessible from the Employee Center or Employee Center Pro via the employee HR profile.	
Create Employee Document with Active Document Type	Validates the creation of: • One active document type • One inactive document type • Employee file with active document type **Note:** Human Resources Scoped App: Core (com.sn_hr_core) and Employee Document Management (com.sn_employee_document_management) must be activated.	Yokohama
[Delegation] Admin - Adding a delegation rule with delegator and delegate user criteria	Verifies that user criteria for a delegation rule works correctly,	San Diego

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HR Service Delivery case tests (continued)

Test	Description	Release version
E2E test for Bulk Case Creation	Verifies that bulk cases can be created for selected users in a specific user segment.	San Diego
ER: Case Restriction	Verifies that restricted cases are only viewable by users with the sn_hr_er.confidential role.	San Diego
HR: Case updates visible to employees	Cases created and updated by an HR agent are visible to the Opened for or Subject person	Quebec
HR: Creation of 401k enrollment case from portal	Creates a 401(k) enrollment case from the Employee Center or Employee Center Pro. Verifies that the case creates successfully.	Madrid
HR: Creation of Employee Relations case from ESC portal	Creates a Disciplinary Issue case from the Employee Center or Employee Center Pro. Verifies that the case creates successfully.	New York
HR: Creation of Employment Verification Letter case from ESC portal	Creates an Employment Verification Letter case from the Employee Center or Employee Center Pro. Verifies that the case creates successfully.	Madrid
HR: Creation of Payroll case from ESC portal	Creates a direct deposit payroll setup case from the Employee Center or Employee Center Pro. Verifies that the case creates successfully.	New York
HR: Creation of Tuition Reimbursement request from portal	Creates a Tuition Reimbursement Request case from the Employee Center or Employee Center Pro. Verifies that the case creates successfully.	Madrid

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HR Service Delivery case tests (continued)

Test	Description	Release version
HR: Fulfillment Instructions	Verifies that fulfillment instructions are created for a specific condition for an opened for user. Also verifies the fulfillment instructions change when the details of the case changes.	Orlando
HR: Fulfillment Instructions conditions for COE specific fields	Verifies the conditions for COE specific fulfillment instruction. Fulfillment instructions update on an HR case based on the conditions defined in the fulfillment instructions.	Quebec
HR: General Benefits Inquiry Case Creation	Creates a General Benefits case using the native UI. It also verifies that the case opens and can be updated after case creation.	Madrid
HR: Payroll Discrepancy Case Creation	Creates a Payroll Discrepancy case using the native UI. It also verifies that the case opens and can be updated after case creation.	Madrid
HR: Reclassify Case Transfer	Tests when an HR case transfers from one COE (HR service) to a different COE using the reclassify (HR case number remains the same) method.	Orlando
HR: Response Template Configuration	Creates a response template for a payroll case and pastes the response in the worknotes.	Quebec
HR: Search catalog items & KBs in ESC	Verifies the search functionality in the Employee Center or Employee Center Pro.	Orlando
HR: Standard Case Transfer	Tests an HR case transfers from one COE (HR service) to a different COE using the standard (creates HR case number and deletes old number) case transfer.	Orlando

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HR Service Delivery case tests (continued)

Test	Description	Release version
HR: Suspend Case Flow	Tests the ability to suspend an HR case and later resume the case.	Rome
HR: Tuition Reimbursement Case Creation	Creates a Tuition Reimbursement HR case.	Orlando
HR: Workforce Administration Case Creation	Creates a Workforce Administration case, signs an employee verification letter, and generates the letter.	Orlando
JA: Publish & edit plan details	Verifies the ability to delete an existing to-do in an action plan.	San Diego
Journey Designer: Create stage and edit stage	Verifies that the user can create a new stage, add a task template to the stage, edit the stage name, and delete the stage.	Vancouver
Journey Designer: Add task templates from scratch and edit	Verifies that the user can add a task template using the Build from scratch option, then edit the task template.	Vancouver
Journey Designer: Add existing task templates and remove task template	Verifies that a task template can be added to a Journey template with the Use template option, and then removed.	Vancouver
Learning Core Task Assignment	Verifies a learning task from a learning catalog can be assigned to a user.	San Diego

Lifecycle Events: Tests for verifying Lifecycle Events

Test	Description	Release version
Configure HR Service for Auto Case Closure	Verifies that Lifecycle event cases are automatically closed.	Orlando
Create Employee request and associate it to LE case	Creates and validates that an employee request appears in the Lifecycle Event case action list.	Rome
Create Employee request for old ticket page	Validates if employee requests can be created from the legacy ticket page.	Yokohama

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Lifecycle Events: Tests for verifying Lifecycle Events (continued)

Test	Description	Release version
[Delegation] Admin - Adding a delegation rule with delegator and delegate user criteria	Verifies user criteria is working for delegation rules for a delegator and delegate user.	Yokohama
HR Lifecycle: Access Ticket page for a NewHire Onboarding Case in Employee Service Center	Verifies creation of a new hire and can access the Ticket page of the Employee Service Center.	Orlando
HR Lifecycle: Access ESC ticket page and todos page and complete assigned todos	Creates a Tuition Reimbursement Request case from Employee Service Center and the Complete NDA to-do from the subject person.	Orlando
HR LifeCycle: Request Onboarding Case Creation	Creates a Request Onboarding case using the native UI and updates the case after creation.	Madrid
HR Lifecycle: Trigger Rescind Workflow	Triggers the Rescind workflow for a New Hire Onboarding Lifecycle Event case.	Quebec
HR Lifecycle: Verify Requests page for Open and Closed cases	Verifies open and closed cases on the Requests page.	Orlando
HR Lifecycle: Verify search in Requests Page	Verifies the search functionality on the Requests page for open and closed cases.	Orlando
[LE]: Add Ad hoc task	Verifies an ad hoc task can be added for a Lifecycle Event case.	Yokohama

Note: Requires the following plugin activation:

- Human Resources Scoped App: Core [com.sn_hr_core]
- Employee Center [com.sn_hr_service_portal]
- Human Resources Scoped App: Lifecycle Events [com.sn_hr_lifecycle_events]
- Human Resources Scoped App: Lifecycle Events for Enterprise [com.sn_hr_lifecycle_ent]

KB: Knowledge block tests

Test	Description	Release version
Create knowledge block and attach block to article	Creates a knowledge block, publishes the block, and attaches the block to a knowledge article.	New York

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KB: Knowledge block tests (continued)

Test	Description	Release version
Preview Knowledge Articles with Knowledge Blocks	Tests for preview of knowledge article that contains knowledge blocks.	New York

Requires the following plugin activation: Human Resources Scoped App: Core [com.sn_hr_core]

Related topics

Quick start tests

Run quick start tests for HR

The base HR application provides several quick start tests you can run.

Before you begin
Role required: sn_hr_core.admin, atf_test_admin, atf_test_designer

Procedure

1. Navigate to **All** > **Automated Test Framework** > **Tests**.
2. Search and select the tests for HR Service Delivery.
   For a list of quick start tests and their descriptions, see Quick start tests for HR Service Delivery.
3. Select **Run Test**.
   The Test Steps tab provides each step of the quick start test.
   After the tests run, the Step Results tab shows the status of each test step. Screen shots also appear at the top of the form as attachments.

Unified Employee Experience

The Unified Employee Experience suite of products consist of Employee Center, the unified portal available in two tiers: the standard version of the product and the subscription-based application, Employee Center Pro, offering advanced features along with other omnichannel experiences and integrations.

Employee Center



Employee Center provides a modern self-service experience for employees

Employee Center Pro



Employee Center Pro expands the portal experience beyond service delivery with employee communication and engagement tools

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Employee Center versus Employee Center Pro

Employee Center is one portal that is packaged as two separate store applications:

- Employee Center: Multi-department service delivery that enables employees to report issues, request items or services, find service-related answers, and complete to-dos. This application and its capabilities are available to all customers by default.
- Employee Center Pro: Subscription-based application that extends the standard Employee Center capabilities including content creation capabilities, multi-stage and multi-channel content delivery, and portal analytics. This application requires additional licensing.

Functionality comparison

Functionality	Employee Center	Employee Center Pro
Service catalog and Knowledge Base articles	✓	✓
AI Search	✓	✓
Chat (live agent, virtual agent)	✓	✓
Curated Experiences (Unified Taxonomy for Employee Center, Dynamic topic pages, Mega Menu)	✓	✓
Complete tasks and Manage requests	✓	✓
Content recommendations (via "recommended for you")	✓	✓
Cross-channel Favorites	✓	✓
Unified employee profile	✓	✓
Guided Self-Service in Employee Center	✓	✓
Employee communications • Portal content • Microsites • Employee News • Content engagement • Campaigns • Content Analytics • Content Governance	✗	✓
Enterprise Search (with SharePoint Online Search Connector)	✗	✓
Integration-powered capabilities • App Launcher • Approval Hub	✗	✓
Manager Hub	✗	✓

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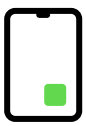
Functionality comparison (continued)

Functionality	Employee Center	Employee Center Pro
Org chart and Dotted-line relationships	✗	✓
Employee Forums	✗	✓
Employee Center Pro Kiosk	✗	✓
Integrated experience and service feedback	✗	✓

Omnichannel experiences

The omnichannel experiences provide different information and communication channels with a unified experience.

Now Mobile



Now Mobile capabilities enable employees to stay connected on the move.

Employee Center Pro Kiosk



Employee Center Pro Kiosk enables the deskless workers with in-context information for operational efficiency.

ServiceNow Add-ins for Microsoft 365



Microsoft 365 add-ins help customize the office controls for employees.

ServiceNow for Zoom



ServiceNow for Zoom helps create a connected experience for users.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

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Employee Center

ServiceNow Employee Center portal is a standard multi-department, dynamic portal for service delivery, and employee engagement.

Employee Center portal enables customers to easily scale their service solutions across departments, such as IT, HR, Workplace, Legal, and Procurement with digital workflows.

This video shows a visual overview of the Employee Center and its capabilities.

https://player.vimeo.com/video/1135503801?h=59092a8b00&badge=0&autopause=0&player_id=0&app_id=5847

Get started

Explore  Learn about Employee Center concepts and features.	Configure  Set-up the portal and Employee Center features.
Use  View your profile, applications, to-dos, and articles.	Reference  Get details about components such as fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Employee Center

Employee Center portal is a unified portal that connects systems across an enterprise within one destination site to provide a centralized employee portal. It requires minimal configuration and offers a wide variety of features to extend portal functionality.

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Employee Center overview

The Employee Center portal empowers organizations to streamline service delivery, enhance employee productivity, and provide seamless access to information and services.

Unified portal experience

Employee Center improves employee productivity by reducing the time and effort employees spend looking for services, updates, and information. With the Employee Center portal, access to information and services across all departments are made simple and can be accessed through any device.

Extensible service delivery platform

Organizations can easily scale from a single to a multi-department service delivery use case that includes best-in-class home page and specialized widgets designed for multi-department tasking.

Available to all customers

There is no additional licensing cost associated with the Employee Center. All customers can use the Employee Center portal to start their employee portal journey with ServiceNow®.



Employee Center workflow

The Employee Center enables organizations to assemble an employee portal tailored to their needs. The following illustration provides an overview The following illustration provides an overview of how users interact with Employee Center.

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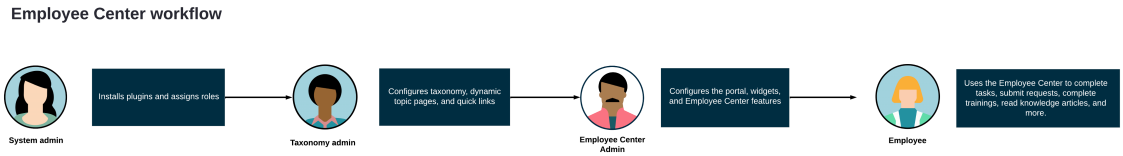
Employee Center workflow



1. System admin installs plugins and assigns roles.
2. Taxonomy admin configures the Unified taxonomy, dynamic topic pages, and quick links.
3. Employee Center admin configures Employee Center portal, widgets, and features including the action framework, employee profile, recommended for you, Guided Self-service, and cross-channel favorites.
4. Employees use the Employee Center to complete tasks and trainings, submit requests, read knowledge articles, and more.

Employee Center for IT Service Management

Use Employee Center to streamline your IT ticket management and other service management tasks. Improve agent experience with higher case deflections enabled by customised, machine learning-driven recommendations and solutions for employees. For more information, see Employee Center for IT Service Management.

What to explore next

To learn more about configuring and using Employee Center, see:

- Configuring Employee Center
- Using Employee Center
- Employee Center reference

Service Portal versus Employee Center application

Both the Service Portal and Employee Center applications are built on the ServiceNow AI Platform and use modern technologies, can be branded and customized, and have more that 200 widgets available. However, the Employee Center is built to scale as multi departmental for all service needs.

The following table lists the key differences between the Service Portal and Employee Center portal.

Applications comparison

Employee Center	Service Portal
Best-practice based portal experience with pre-loaded widgets organized coherently across the portal.	Demo home page design where customers start from scratch to design their desired experience.

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Applications comparison (continued)

Employee Center	Service Portal
Dynamically created topic pages based on unified taxonomy for all content types across departments.	Requires designing, creating, and maintaining individual topic pages.
Highly scalable: all portal elements, including widgets, are designed to scale for enterprise service delivery.	Need to redesign the portal with every new use case or department added.
Unified taxonomy enabled AI search that allows browsing different content types, across departments, without switching pages.	Content is siloed across different content type and departments with poor search experience.
Unified taxonomy for all content types that drives employee-centric content discovery.	Ineffective content discovery leading to difficulty in defining an employee centric taxonomy for navigation across the portals.
Integrated with Now Mobile to create an omni-channel user experience.	

Employee Center for IT Service Management

Employee Center for IT Service Management helps you improve the self-service capabilities and perform diverse admin and service management tasks from a dynamic unified employee portal.

Automate routine agent interactions and increase the speed of resolution from the Employee Center portal. Recommendations based on machine learning enable automated incident categorization and assignment. It helps eliminate bottlenecks created by manual incident management on the IT Service Management ITSM.

For more information on the Employee Center portal and the features, see Employee Center.

All that you get with Employee Center for ITSM

Connect everything and easily scale across the enterprise to deliver the experiences you need. Provide a modern employee experience platform across the enterprise to:

- Improve case-deflections for the admins to focus on more complex tasks
- Improve service management like managing the Service Catalog and the Knowledge Base articles on ITSM
- Improve self-service for the employees
- Increase employee engagement
- Increase employee productivity

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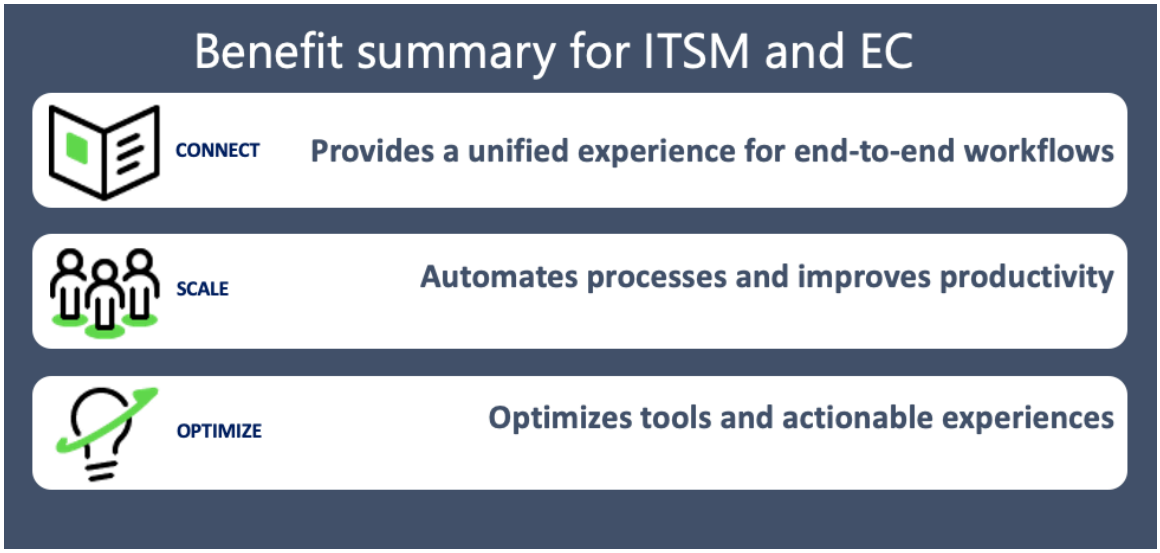

How to use Employee Center for ITSM

Functionality comparison

Functionality	ITSM Standard	ITSM Pro/ Enterprise	Employee Center Pro
Unified employee profile	✓	✓	✓
Complete tasks	Approvals	Approvals, universal tasks	Campaign tasks
Curated experience (rich content, unified browse option) and AI search	✓	✓	✓
Service catalog and knowledge-base support	✓	✓	✓
Content recommendations	By popularity	Machine-learning driven	By popularity
Content experience (content automation, campaigns)	✗	✗	✓
Content publishing (content library, schedule content, org chart)	✗	✗	✓
Integration-powered capabilities (App launcher with SSO and non-SSO apps)	✗	✗	✓
Employee forums	✗	✗	✓

Meet increasing demands without further addition to staff while empowering existing IT staff and management staff to focus on more meaningful work. Provide better experience and support to the employees.

Employee Center for ITSM highlights

Empower users with the operational efficiencies gained from greater self-service, actionable communications, and unified experiences.

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Employee Center experience for employees

You can use the Employee Center to enable your employees with personalized, consumer-grade experiences. In one place, employees can

- Find relevant IT support, topic pages, communications, and applications
- Improve processes, operational efficiency, and employee productivity

Employee Center experience for admins

Experience more simplified user interface to deflect simple cases with recommendations and self-service. Spend your time on more complex issues that improves the overall ITSM portal experience.

Service management is also easier with rich content editor and unified browse to see all content types in one place.

Employee Center functionalities for ITSM



Employee Center and ITSM workflows

Configure and manage the capabilities to improve self-service and time-to-value.

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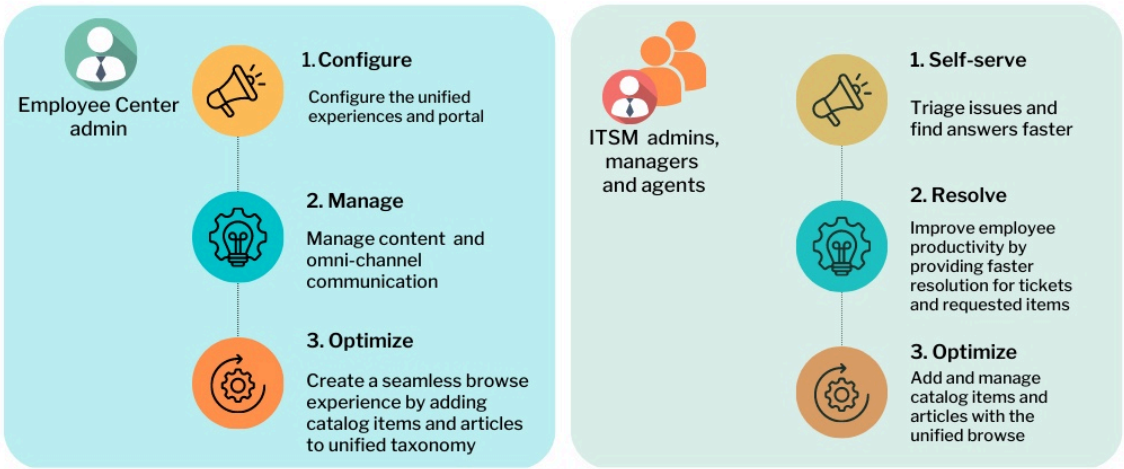
Employee Center for ITSM workflow

Employee Center and ITSM workflow



Prerequisites to use Employee Center for ITSM

Ensure that the following requirements are met to use Employee Center with ITSM.

- You can use Employee Center with ITSM or ITSM Pro subscription.
- You must subscribe to Employee Center Pro separately from the ServiceNow store.

Configure the Employee Center functionalities for ITSM

Leverage Employee Center for ITSM to provide an omni-channel experience to the employees, agents, and service managers.

To get started with Employee Center for ITSM, follow these steps.

Configure EC functionalities for ITSM

Tasks	Capabilities	Roles
Get started	Complete the installation of EC, EC Pro, and plugins.	admin
Configure portal	Configure the following capabilities to optimize the user experience. • Employee requests page • Quick links • Recommended for you • Personalized Answers on Employee Center • Employee requests page • My active items widget configuration	admin

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Configure EC functionalities for ITSM (continued)

Tasks	Capabilities	Roles
Configure mobile content	Configure mobile	sn_cd.content_manager
Configure curated experiences	• Unified Taxonomy for Employee Center • Dynamic topic pages • Mega menu configuration	admin
Work with action framework	Action framework	sp_admin or sn_hr_sp.esc_admin
Configure unified approvals experience	Approvals hub	sn_hr_sp.esc_admin
Configure Employee Profile	Employee profile	sn_employee.admin

For more information on configuring Employee Center, see Employee Center admin configurations.

Manage the Employee Center functionalities for ITSM

Manage the operational activities to improve the processes and workflows.

To manage the operations Employee Center for ITSM, follow these steps.

Manage EC functionalities for ITSM

Tasks	Capabilities	Roles
Work with taxonomy	Manage taxonomy	sp_admin, taxonomy admin, or taxonomy manager
Manage content	Managing content requests	Content manager
Manage applications	Access applications from App Launcher	admin
Manage campaigns	Creating campaigns	Campaign manager
Manage favorites	Manage favorites	admin

For more information on managing Employee Center, see Authoring and managing employee communications.

Use the Employee Center functionalities for ITSM

Use Employee Center for ITSM together to reduce costs, deliver high-quality customer and employee experiences, and drive operational resilience.

To use Employee Center for ITSM capabilities, follow these steps.

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Use EC functionalities for ITSM

Tasks	Capabilities	Roles
Approve requests from employees	Use approval experience	Employee/Approver
Access all your applications in one place	App Launcher	Employee/Agent
Track all your tasks through the Unified Employee profile	Use the My To-dos page	Employee/Approver
Mark service catalog items and knowledge base articles as your favorites	Manage favorites	Employee/Agent
Track your leave balance on the same platform	Personalized Answers	Employee/Agent

For more information on using Employee Center, see Using Employee Center.

Configuring Employee Center

Guidance for setting up Employee Center.

Employee Center is available on ServiceNow® instances that are on version Rome or later.

In the links below, Employee Center features are organized into categories, each with its own landing page to help guide users through the configuration process.

- Employee Center admin configurations

  Install plugins, assign roles to users so they can configure Employee Center features, and customize the portal with a theme, footer, and support for right-to-left languages.

- Browse experience features

  Make it easy for employees to navigate the portal and discover content.

- Search experience features

  Enhance the search experience.

- Task Management and Integration

  Enhance employee productivity and drive portal consolidation.

Related topics

Configuring Employee Center for mobile

Employee Center admin configurations

As the system admin, install Employee Center plugins, assign roles to users so they can configure Employee Center features, set the theme, header, and footer, and enable support for right-to-left languages.

The Employee Center application provides out-of-the-box portal pages with relevant widgets necessary to deliver an employee-centric portal experience.

To get started, follow these key steps to configure the portal:

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1. Install plugins
2. Assign roles
3. Configure the portal:
   - Customize Employee Center portal theme
   - Employee Center global header
   - Footer configuration
   - Enable support for right-to-left languages
   - Modify the portal pages, such as the home page:

     Navigate to **Service Portal** > **Pages** to view all the pages.

     Note: The default Employee Center home page is `ec_home`.

   - Modify the email notification subject and body, such as when a new task is assigned: Modify email notification layout

Employee Center plugins

Discover the Employee Center plugins that are included out-of-the-box on a new ServiceNow® instance.

Available out-of-the-box

New ServiceNow® instances include the Employee Center and dependency plugins. Review the following table to learn more about the plugins.

Base Employee Center plug-ins

Plugin	Description
Employee Center (sn_ex_sp)	Installs a customizable multi-department portal and framework to help administrators build a self-service portal that provides a great self-service experience for employees.
Employee Center Core (sn_hr_sp)	Activates a portal framework that allows administrators to build a mobile-friendly self-service experience for users.
Employee experience taxonomy (sn_ect)	Provides an employee content taxonomy for multi-department service delivery.
Employee Experience Foundation (sn_ex_emp_fd)	Contains components such as best practice email layouts that improve employee experiences.
Employee Profile (sn_employee)	Enhance employee experience with a unified, configurable profile, offering comprehensive work-related information, extensibility across business units, and personalized visibility settings.

For more information, see the List of plugins (Australia).

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Employee Center roles

Employee Center plugins include necessary roles for configuring and using the features. Learn more about the roles and the tasks they can perform.

Users and roles are configured at the platform level. For information, see Assign a role to a user.

Employee Center

Employee Center roles and descriptions

Role	Description	Contains roles
Employee Center Admin [sn_hr_sp.esc_admin]	A user with this role can manage and configure the Employee Center. **Note:** The sp_admin and esc_admin have scripting rights. These roles can create a widget and run a script to update cross-scope tables.	• catalog_admin • chat_admin • live_feed_admin • sn_employee.admin • sn_ex_emp_fd.portal_stats_manager • sn_hr_sp.admin • sp_admin
Taxonomy Admin [taxonomy_admin]	A user with this role can update and modify any created taxonomy in the taxonomy and topic table names.	user_criteria_admin
Taxonomy Manager	A user criteria on the taxonomy record. A user assigned as a taxonomy manager can manage topics and connected content, but they cannot manage the taxonomy record.	Not applicable
Taxonomy Contributor	A user criteria on the taxonomy record. A user assigned as a taxonomy contributor can associate content to the topics.	Not applicable
Topic Manager	A user criteria on the topic record to decentralize topic management. Users assigned as Topic managers can create, move, or clone topics within or between taxonomies, depending on the rights assigned to them.	Not applicable
Topic Contributor	A user criteria on the topic record for topic management level tasks, such as handling connected content, features content, Knowledge Base	Not applicable

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Employee Profile

For more information, see Employee profile

Employee profile roles and descriptions

Role	Description	Contains roles
Employee profile admin [sn_employee.admin]	Configures employee profile	• image_admin • ml_admin

Migrate to Employee Center from Service Portal

Migrate to the Employee Center portal to provide employees with a unified portal experience.

Before you begin

Role required: admin

About this task

Procedure

1. Install Employee Center from Store.
2. Create a unified taxonomy for catalog items and knowledge articles to implement the unified browsing capability.
   For more information, see Unified Taxonomy for Employee Center.

   Note: Copy and modify the default taxonomy that comes with the demo data for your business needs.

3. Add banner and thumbnail images for each topic.
4. Ensure all request types are captured in **My Request Filters** to consolidate request types.
   For more information, see Employee requests page.
5. Configure tasks using **To-dos configuration** to include approvals.
   For more information, see Employee tasks page.
6. **Optional:** Modify the portal theme.
   For more information, see Customize Employee Center portal theme.
7. **Optional:** Use the Email notification layout and template that is shipped with the Employee Experience Foundation (com.snc.sn_ex_emp_fd) plugin to deliver notifications that are consistent.
   For more information, see Modify email notification layout.
8. Navigate to **Service Portals** > **Portals** and change the existing portal URL suffix to prevent any breakage of old URL references that an employee has.
9. If you have any custom built pages, use the page route maps to redirect to appropriate pages of new portal.
10. If any page in new portal doesn't have equivalent old portal experience, use page route maps to redirect to appropriate pages or portal landing page.
11. Install **Service Portal Analytics** for web analytics.

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a. Navigate to **Service Portal** > **Portals**.

b. Click **Employee Center**.

c. Click **Create Analytics Settings**.
If analytics are already set up, the button updates to View Analytics Settings

Install Employee Center

Install Employee Center to deliver a unified, engaging employee experience across departments and systems.

Before you begin

The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

Employee Center (sn_ex_sp) installs the following dependent plugins:

Employee Center Core (sn_hr_sp)

Activates a portal framework that allows administrators to build a mobile-friendly self-service experience for users.

Employee experience taxonomy (sn_ect)

Provides an employee content taxonomy for multi-department service delivery.

Employee Experience Foundation (sn_ex_emp_fd)

This plugin contains components such as best practice email layouts that improve employee experiences.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Employee Center application (sn_ex_sp) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Employee Center.

4. Check the **Load demo data** check-box to include the demo data along with your install or repair your install with demo data checked.

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Note: Dependent plugin demo data is not automatically installed. To use demo data, repair the plugins with demo data checked. See Repair a ServiceNow application.

5. Select **Install**.
6. Run the fix script **Set primary topics for Employee taxonomy** to index the curated experiences demo data into search and recommended content.
   For more information, see Run fix scripts to update Employee Center.

What to do next

Check and allow all the RCA (Requested Caller Access) privileges requested by Employee Center. For more information on running a fix script for RCA approvals, see Run fix-script for RCA approvals.

Post installation troubleshooting

To index the curated experiences demo data into search and recommended content and allow all RCA privileges, run the fix scripts.

Run fix-script for RCA approvals

After you install or upgrade to the latest Employee Experience applications from ServiceNow Store, you might encounter Restricted Caller Access (RCA) approval messages requesting for an update in the access request.

Before you begin

Role required: admin

About this task

Install the following Employee Experience applications and subscriptions.

- Employee Center Core
- Employee Center
- Employee Center Pro
- Content Experiences
- Content Publishing

The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming.

To automate the RCA approvals for any record, you can run the **EC bulk RCAs approval** script where the source scope is one of the given Employee Experience applications.

Download the following **EC bulk RCAs approval** file from the ServiceNow Store.

Note: This file is a standalone script to reduce the manual effort involved.

After you download the script file, perform the following steps.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Right-click the header and choose **Import XML**.
3. Click **Choose file** and select the XML file that you downloaded.

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4. Search and find the **EC bulk RCAs approval** script record.
5. Click **Run Script** to allow all the requested RCAs.

Run fix scripts to update Employee Center

Manually run fix scripts to upgrade to the latest taxonomy-based Employee Center. Download the latest version from the ServiceNow® Store before running the scripts. The scripts update your existing portal setup to Employee Center without performing multiple set up or configuration steps.

Before you begin

Role required: admin

About this task

Manually run the following are the scripts if

- You are an existing Employee Service Center (HR) customer and have modified the portal records.
- You have not installed the demo data at the time of installation, repair the dependent plugins as described in Install Employee Center and Install Employee Center Pro.

Fix scripts

Fix script	Description
Employee Center Easy Install	Helps to uptake taxonomy for Employee Center. This script runs automatically during install or upgrade. Modifies the following if the employee center portal record is not customized. • Updates the catalog search source. • Associates the taxonomy to portal. • Updates the dashboard, theme, and menu in employee center portal record. **Note:** Running this script overrides and resets any modification made to the portal configuration.
Set primary topics for Employee taxonomy	Fixes features like the **Recommended for you** and the **View as Direct Report** searches, if **Employee** taxonomy is associated to the portal. Updates the **taxonomy_topic** column in the knowledge articles and catalog items to the corresponding mapping found in m2m_connected_content table.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for `Employee Center Easy Install` or `Set primary topics for Employee taxonomy` script, and click to open.

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3. In the **Script** field, change the *runManually* parameter value to **true**.
4. Click **Run Fix Script**.

Result
Your existing portal is updated to the latest Employee Center portal that uses unified taxonomy.

What to do next
Configure AI search to align with curated experience. For more information, see AI Search for Curated Experiences.

Customize Employee Center portal theme

A theme is a collection of one or more style sheets (CSS files) that define a consistent look for a set of pages. Customize the default portal theme to apply your own theme to suit your branding and improve the visual design of the portal pages.

Before you begin
Role required: admin

About this task
Employee Center application ships a default **EC theme** that has the best visual design experience. The EC theme provides a consistent experience across all portal pages.

Procedure
1. Navigate to **Service Portal** > **Themes**.
2. Search for `Employee Center Coral Theme` as the default theme.

Note:
- Use the default theme for better visual and usability experience. However, you can select other themes to suit your needs.
- Remove the customized portal theme before an upgrade to see any default theme that might be released with a future version of Employee Center.

3. **Optional:** Customize the theme content to suit your requirement.
   a. Navigate to **Service Portal** > **Themes**.
   b. Select **EC Theme** to open the page.
   c. Edit the **CSS variables** field to customize the text and the background colors of your portal. For a description of the field values to create a portal theme, see Create a portal theme.
4. Navigate to **Service Portal** > **Portals** > **Employee Center**, click **Try it** to preview Employee Center.
5. Select **Update**.

Related topics
Configure Employee Center Pro Kiosk

Enhanced chat in Employee Center

Configure portal branding

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Modify email notification layout

Modify the email notification layout and template that is shipped with the Employee Experience Foundation (com.snc.sn_ex_emp_fd) plugin.

Before you begin

Role required: admin

About this task

Apply the layout to email notifications to elevate the look and feel, and deliver branded notifications.

Note: The Employee Experience Foundation (com.snc.sn_ex_emp_fd) plugin is installed as a dependent plugin with Employee Center or Employee Center Pro. However, you can still independently install the plugin from ServiceNow Store.

The Employee Experience Foundation (com.snc.sn_ex_emp_fd) plugin is shipped with the following.

- Employee notification layout: Provides a Next Experience themed layout to apply to the email templates for all employee facing notifications. This layout includes best practices, standards, and styles. Use the following layout items:
  - Header
  - Footer
  - Unsubscribe and Change preference links
  - Easily modifiable brand logos
  - Web Responsiveness
- Employee notification template: Provides a template for Email notification layout to create reusable content for the subject line and message body. Apply the template to employee facing notifications to deliver consistent information.

View the following examples to understand how the notification looks with and without the Email notification layout.

With layout

Without the layout

Note: If you are an upgrade customer, to use the latest email layout, install the Employee Experience Foundation (com.snc.sn_ex_emp_fd) app from ServiceNow® Store.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Search for the notification that you want to apply the template.
3. Click open the notification and check if it is **Active**.
4. On the **What it will contain** tab, select search and apply the `Email notification template` for **Email template**.
   To modify the template body, logo or any other details follow the steps.
   a. Navigate to **All** > **System Notification** > **Email** > **Templates**
   b. Open the **Email layout** record to modify it.
   c. Make your changes and **Save** or **Update** the record.

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5. Modify the email body or use it as given.
6. **Preview Notification** and click **Update**.

What to do next
Reuse the Employee notification layout for any of your templates to build consistent notifications.

Related topics
Configure the mail and SMS send to self

Enable support for right-to-left languages

When the session language is a right-to-left language, the direction of the portal user interface is mirrored to display from right to left.

Before you begin
Understand how the UI works for a right-to-left language, see CSS for right-to-left languages in portals.

Role required: sp_admin or admin

About this task
Based on the selected language preferences, the entire hierarchy of existing infrastructure for styling left-to-right languages—the theme, page, widget, and widget instance SCSS—is converted to CSS for right-to-left languages.

- When the session language is a right-to-left language, for example Hebrew, the direction of the portal user interface displays from right to left.
- The arrow next to View Org Chart in employee_profile widget, View All in ec_pro_dashboard, employee taxonomy topic widget, and across Employee Center points to left per the RTL format.

Procedure
1. Navigate to **All** > **Service Portal** > **Portals**.
2. Select the Employee Center portal.
3. Select the **Support right-to-left languages** option.
4. Select **Update**.
   CSS that mirrors the direction of a portal user interface for right-to-left languages is generated.

Result
When the session language is a right-to-left language, the direction of the portal user interface displays from right-to-left. The arrow next to View Org Chart in employee_profile widget, View All in ec_pro_dashboard, employee taxonomy topic widget, and across Employee Center points to left per the RTL format.

Note: When you support Right-to-Left languages, change the **Card Content Alignment** field value to Right. Alternatively, use the center alignment to avoid issues.

For more information, see Modify the Quick links widget display.

Employee Center global header

The global header is the first row in the Employee Center portal header. The global header contains menus that enable you to navigate to the My To-dos page, My Requests page, More menu, user profile, and Tours.

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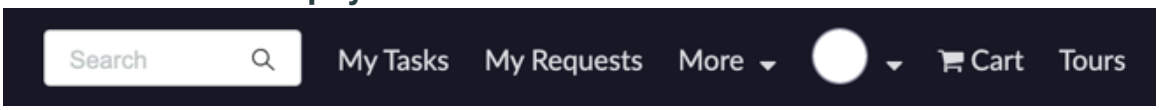
Global header in the Employee Center



The global header consists of the following options.

Global header options

Option	Description
Brand logo	Logo of the company.
Search bar	Enables you to search for the taxonomy content. This option is disabled by default.
My Tasks	Opens the To-dos page.
My Requests	Opens the My Requests page.
More	Shows the additional menu items that you want to add. **Note:** Add any new menu items to the EC Header under the **More** option. Currently, Filtered or Scripted menu items are not supported as Filtered or Scripted List must be top-level Menu Item. .
Cart	Shows the items that you have added to the cart. This option is disabled by default.
Wishlist	Shows items that you intend to buy later. This option is disabled by default.
Tours	Opens guides tours that demonstrate how to use a feature. For example, an administrator can create a task demo with callouts to demonstrate how to perform the task.

You can enable or disable these options by configuring additional options in JSON format for the Employee Center menu record.

Note: For performance reasons, the header request count for My Requests is disabled by default.

Add more menu items

Add your own list of items for user-related activities, such as My Assets, My Reservations, My Plans, My Surveys, and My Purchases on the **More** menu.

Before you begin

Role required: admin

Set the scope to Employee Center before configuring the More menu item.

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More menu on the global header in the Employee Center



About this task

In the More menu, you can add menu items for user-related activities, such as My Assets, My Reservations, My Plans, My Surveys, and My Purchases. You can enable or disable the More menu on the global header. You can see the **More** menu only when you add more than one menu items. If you add only one menu item in the **More** menu, the **More** menu is not displayed and the name of the menu item is displayed directly on the global header. For more information, see Enable or disable global header options.

You can configure the More menu to display menu items by installing their respective plugins. For Example, My Action Plans is displayed under the More menu when you install the Journey Accelerator plugin.

Procedure

1. Navigate to **All** > **Service Portals** > **Portals**.
   The Service Portal module displays the list of all the available portals.
2. Click **Employee Center**.
3. Next to the **Main menu** field, click **Preview this record** and open the record.
4. In the Menu Items related list, click **More**.
5. In the Menu Items related list, click **New**.

   Note: Add any new menu items to the EC Header under the **More** option. Currently, Filtered or Scripted menu items are not supported as Filtered or Scripted List must be top-level Menu Item.

6. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Menu Item form.
7. Click **Submit**.

Enable or disable global header options

Enable or disable the global header options by configuring additional options in JSON format for the Employee Center menu record.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Portals** > **Portals**.
   The Service Portal module displays the list of all the available portals.
2. Click **Employee Center**.
   If the Employee Center form is read-only, the message `To edit this record click here` appears at the top.

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3. Click **here** to edit the form.
4. Beside the **main menu** field, click the **Preview this record** icon to open the Employee Center menu record.
5. Edit the **Additional options, JSON format** field.

Option	Parameter setting
Search bar	To enable this option, set the *exclude_search_on_homepage* value to **false**. `"exclude_search_on_homepage":{ "displayValue":"false", "value":false` Default value: true **Note:** By default, the search widget is displayed in the Employee Center home page. Search bar on the global header is hidden by default that you can enable, if needed.
Wishlist	To enable this option, set the *enable_wishlist* value to **true** `"enable_wishlist":{ "displayValue":"true", "value":true` Default value: False
My Requests	To disable this option, set the *enable_requests* value to **false** `"enable_requests":{ "displayValue":"false", "value":false` Default value: True
My Tasks	To disable this option, set the *enable_tasks* value to **false** `"enable_tasks":{ "displayValue":"false", "value":false` Default value: True
More	To disable this option, set the *enable_more_items* value to **false** `"enable_more_items":{ "displayValue":"false", "value":true, "sysId":"47c952cbec8305107f44e04d648d43c0"`

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Option	Parameter setting
	Default value: True
Cart	To enable this option, set the *enable_cart* value to **true** `"enable_cart":{ "displayValue":"true", "value":true` Default value: False
Update Cart	To enable this option, set the *auto_update_cart* value to **true**. Update the shopping cart automatically with user-specific changes from multiple tabs and plat forms. `"auto_update_cart": { "displayValue": "true", "value": true}` Default value: True

Note: For a topic to show up in the **Header Menu**, ensure that you add content to the topic.

6. Click **Update**.

Configure widget heading levels for accessibility

Flexible heading configuration helps with widget accessibility compliance on homepage and topic pages.

Before you begin
Role required: admin.

About this task
Manage widget headings from Heading1 to Heading6 to support company standards, conform with accessibility, and improve usability for the following widgets.

Procedure
1. On the Employee Center home page, press and hold the control key, right-click one of the following widgets, and then select **Instance Options**.
   - Topic Header
   - Content Experience
   - Sub Topic
   - Rich Content
   - Quick Links
   - Topic Content

   The following example shows an instance option for topic page.

Instance option

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You can go to these widget instance options and select the title heading level (H1, H2, H3, etc.) directly for flexible and accessible heading structure.

2. Change the widget level heading from the available options, Heading 1 to Heading 6.

   Heading level selection

3. Fill in the following fields as explained in Modify the Support resources widget display
4. Click **Save**.

Result
A flexible heading for the widget is configured.

Footer configuration

Employee Center and Employee Center Pro include a footer by default, which you can configure.

You can configure the footer to display the following information about your company:

- Corporate office address
- Email address
- Terms and conditions
- Privacy policy
- Social media handles

Configure the footer

Configure the footer in Employee Center or Employee Center Pro to display your company's corporate office address, email address, and so on.

Before you begin
Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **Employee Center** > **Employee Center Footer**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information on form fields and descriptions, see Footer form.
4. Click **Save** or **Submit**.

What to do next
If you click **Save**, the Employee Center Footer Menus section appears.

To configure menus for the footer, see Configure the footer menus.

Configure the footer menus

Footer menus enable you to create menus and associate links to internal and external resources under each menu.

Before you begin
Role required: sp_admin or admin

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About this task

After you create a footer, configure the menus for the footer. For example, you can create Marketing as a menu category and associate links, such as Media Relations, Press Releases, and Brand Library to this menu.

Marketing menu with associated links in the footer

Procedure

1. Navigate to **All** > **Employee Center** > **Employee Center Footers**.
2. Click the footer that you want to configure menus for.
3. In the Employee Center Footer Menus section, click **New**.
4. On the form, fill in the fields.
   For more information on form fields and descriptions, see Footer Menus form.
5. Click **Submit**.

Footer form

Use the Footer form to create a new footer that you want to appear in the Employee Center or Employee Center Pro.

Footer form

Field	Description
Name	Name of the footer.
Portal	The portal that you want to associate this footer with.
Logo	The logo of your company that you want to appear in the footer.
Organization Content	Information about your company that you want to appear in the footer.
Copyright	The copyright information to appear in the footer.
Active	Option to activate this footer for use.

Footer Menus form

Use the Footer Menus form to create a new footer menu that you want to appear on your Employee Center or Employee Center Pro.

Footer Menus form

Field	Description
Footer	The name of the footer that you want to create menus for.
Menu	The main category under which you want the footer links displayed.
Link Type	How you want the links on the menu to appear in the footer on the Employee Center. Select any of the following options: • **Navigation Links**: Displays links at the top of the footer. You can add links that let you navigate to different information resources and pages. • **Bottom Links**: Displays links at the bottom of the footer. You can add links to information such as, terms and conditions, privacy statement, and so on. • **Social Icons**: Displays social media icons, such as Twitter, Facebook, and LinkedIn.

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Footer Menus form (continued)

Field	Description
Order	The order in which you want the menu to appear in the footer.

Employee live chat overview

As an employee, you can chat directly and in real time with support agents through the Employee Center. When you initiate a chat and select a conversation topic, you are routed to the appropriate chat queue and connected to a support agent.

Connect Support is a messaging tool that enables support agents to provide real-time assistance for end users, and is automatically enabled with Employee Center. Your administrator can create multiple chat queues for different departments, such as queues for HR, IT, Payroll, or Facilities. To set up the chat queues and learn more about Connect Support, see Connect Support.

Note:

Starting in Utah, Connect Support has been deprecated and is no longer supported or available for new activation. For similar capabilities, please move to Advanced Work Assignment and Agent Chat. For details, see Move from Connect Support to Advanced Work Assignment and Agent Chat.

If no chat queues are defined, then the chat queue defaults to:

- Virtual Agent Support
- (HR Service Delivery only) HR Department Chat Queue

When you initiate a chat in the Employee Center, a pre-chat conversation is displayed with pre-chat categories. The following GIF shows an example of initiating a chat.

Note: These pre-chat categories are only used with live chat. If you are using Virtual Agent with Employee Center, then these pre-chat categories don't apply.

Configuring the pre-chat categories in live chat

Your administrator can control the pre-chat categories that appear in the pre-chat conversation by adding survey choices in the appropriate configuration. For example, your administrator can configure benefits, employee relations, and travel and expense categories that route to an HR chat queue; finance and payroll categories that route to a finance chat queue.

Note: If the survey options are not defined, the pre-chat conversation is displayed without data.

Portal performance optimization

Learn more about the heavy-load and high-traffic scenarios and ways to optimize the user experience and portal performance.

Using the following performance enhancements, you can improve the overall user experience.

- **Optimized high-load experience**: Optimizes the employee experience during high usage such as live events, major announcements.

  For more information, see High-traffic experience.

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- **Defer widget load**: Speeds up initial page rendering by loading only essential content first and deferring non-critical elements until later. Delay loading non-critical resources until after the main content is rendered.

  For more information, see Defer load in Employee Center.

- **Mega menu async load**: Loads resources or data asynchronously in the background without blocking the main thread.

  For more information, see Configure Mega menu async load system properties.

- **Skeleton load**: Improves perceived performance by displaying placeholder elements (like grey boxes or lines) while actual content is loading. This placeholder UI reassures employees that the system is functional and reducing the wait times.

Admins can select regular or light modes by configuring your widget instances.

Note:

- Skeleton loaders are not applicable to the customized widgets.
- Defer load configuration at the SP Portal level overrides the instance-level configurations.

Related topics

Configure Mega menu async load system properties

Modify defer load instance option

High-traffic experience

High-traffic experience

Learn more about the heavy-load and high-traffic scenarios and ways to optimize the user experience and portal performance.

Employees see slow or unresponsive pages with clear message on the home page and widgets. With the lite mode, you can provide a portal experience that improves the usability with clear messaging. For more information, see Create and edit a page using the Service Portal Designer. The key benefits are:

- Enhance the user experience with clear communication.
- Reduce visual complexity and resource usage for faster performance. T
- Help you navigate to your tasks, requests, favorites, and search effectively.

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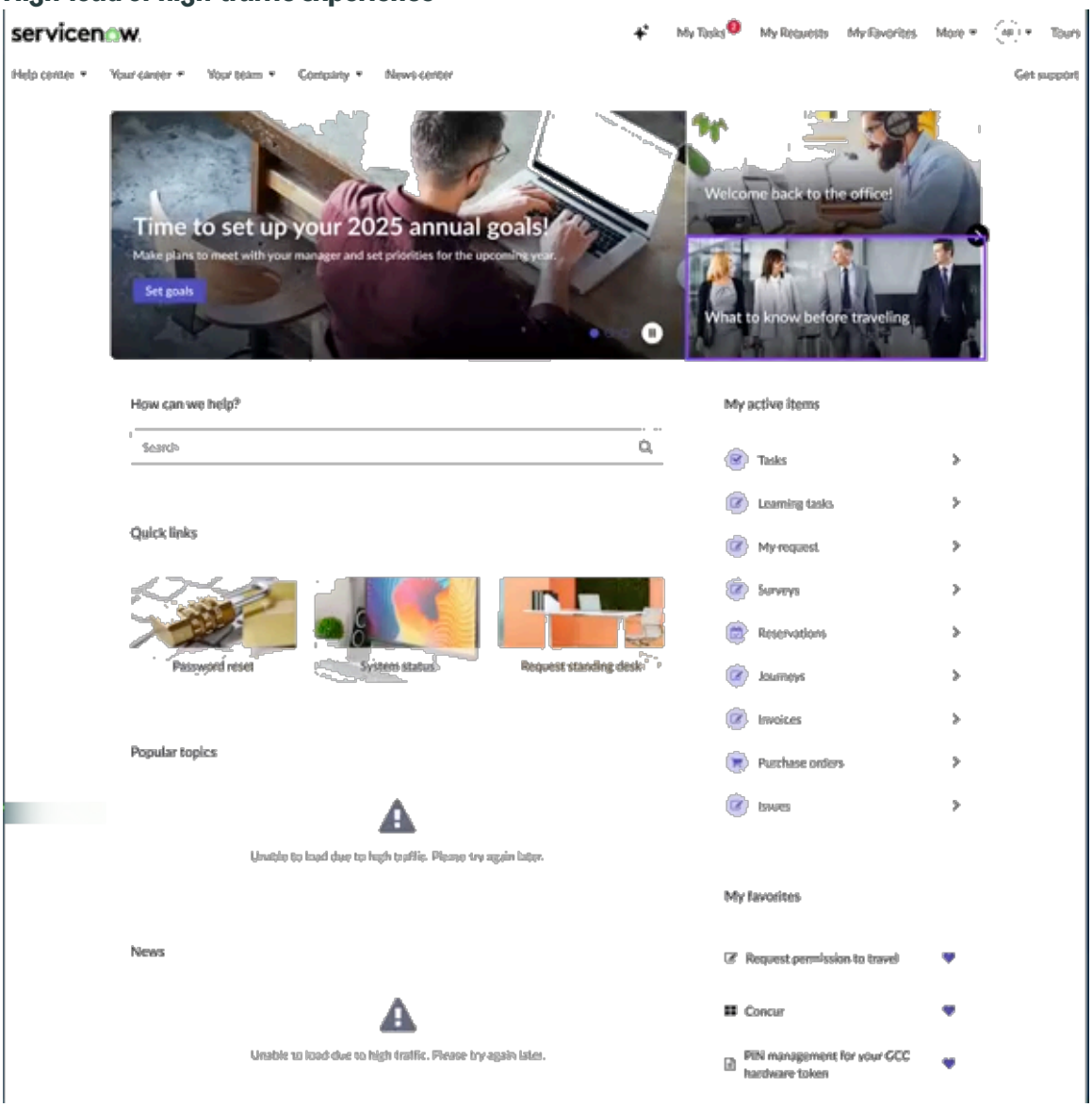
High-load or high-traffic experience



Related topics

Modify homepage banner instance for high-traffic

Modify homepage banner instance for high-traffic

You can configure the instance options to control the display of widgets and improve the homepage banner instance for high-traffic experience.

Before you begin

Role required: sp_admin or admin

Procedure

1. Navigate to **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Press and hold the control key on the keyboard, right-click the widget, and then select **Instance Options**.
3. Configure the instance options.

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Homepage banner instance options

Instance option	Description
Visibility	The choices are **Yes** and **No**. For high-load scenarios, the default is yes.
Alert message type	Type of the message to display on the widget. The choices are: ○ **Warning** (Default) ○ **Information** ○ **Error**
Alert message text	Message text that you want to display, for example, `Some information may be temporarily unavailable as we're experiencing heavy usage. Try again later.`
Show dismiss action icon	Icon to click and dismiss the message.

4. Click **Save**.

Note: The homepage banner message is available in the EC, EC Pro, and Kiosk home pages.

What to do next

You can find a similar experience for the following widgets:

- **Popular topics**: During high-traffic, the widget displays the message.

  ```
  We're experiencing heavy usage. Try again later.
  ```

  For more information, see Popular topics widget.
- **My active items**: During high-traffic, the widget doesn't display the count of items.

Related topics

Defer load in Employee Center

Defer load in Employee Center

Learn more about the heavy-load and high-traffic scenarios and ways to optimize the user experience and portal performance.

The Service Portal Designer **Defer widget loading** option helps configure the widgets load in a skeleton view. For more information, see Create and edit a page using the Service Portal Designer. The key benefits are:

- Improve performance and reduce initial load times.
- Enhance the user experience with skeleton loaders.
- Create a faster loading experience by enhancing user satisfaction.

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- By matching skeleton loaders to the final widget appearance, the loading process becomes visually coherent, improving the overall usability of the page.
- Improve performance across browsers and devices.

Related topics

Modify homepage banner instance for high-traffic

Modify defer load instance option

Deferred loading helps delay the loading of a resource or widget to improve the overall usability of the page.

Before you begin

Ensure you understand the deferred load behavior. For more information, see Create and edit a page using the Service Portal Designer and Configure widget loading order in Service Portal.

Role required: admin.

About this task

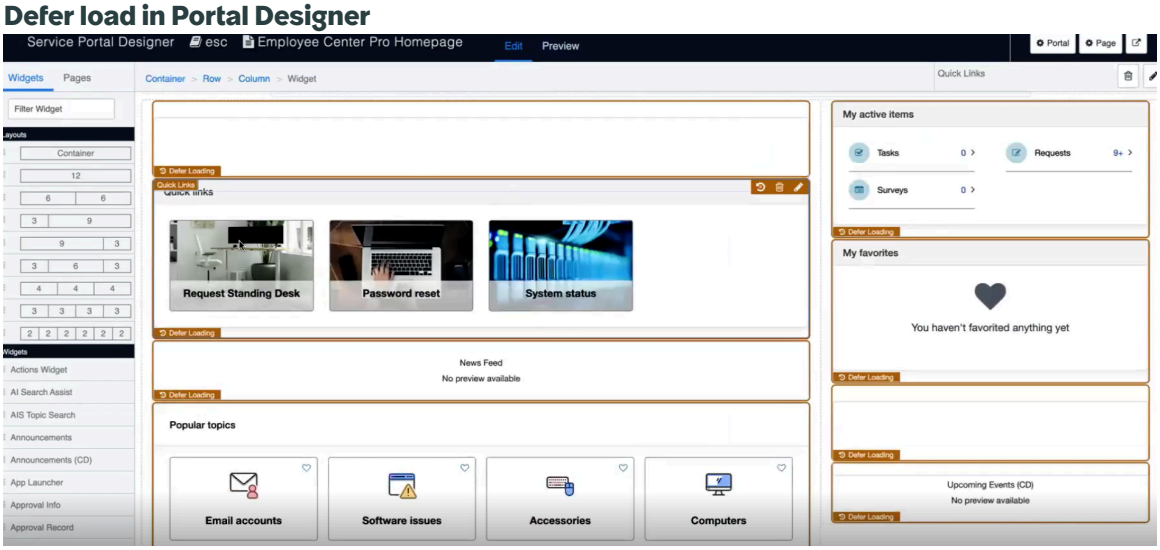
The deferred load is available for the following widgets.

- Content Experience
- Quick Links
- News Feed
- Popular Topics
- Relevant for you
- App Launcher
- My active Items

Procedure

1. Follow one of the steps:
   a. Navigate to **All** > **Service Portal** > **Service Portal Configuration** > **Widget Editor**.
   b. On the Employee Center home page, press and hold the control key, right-click the widget, and select **Page in Designer**.
   The following page appears.

Defer load in Portal Designer



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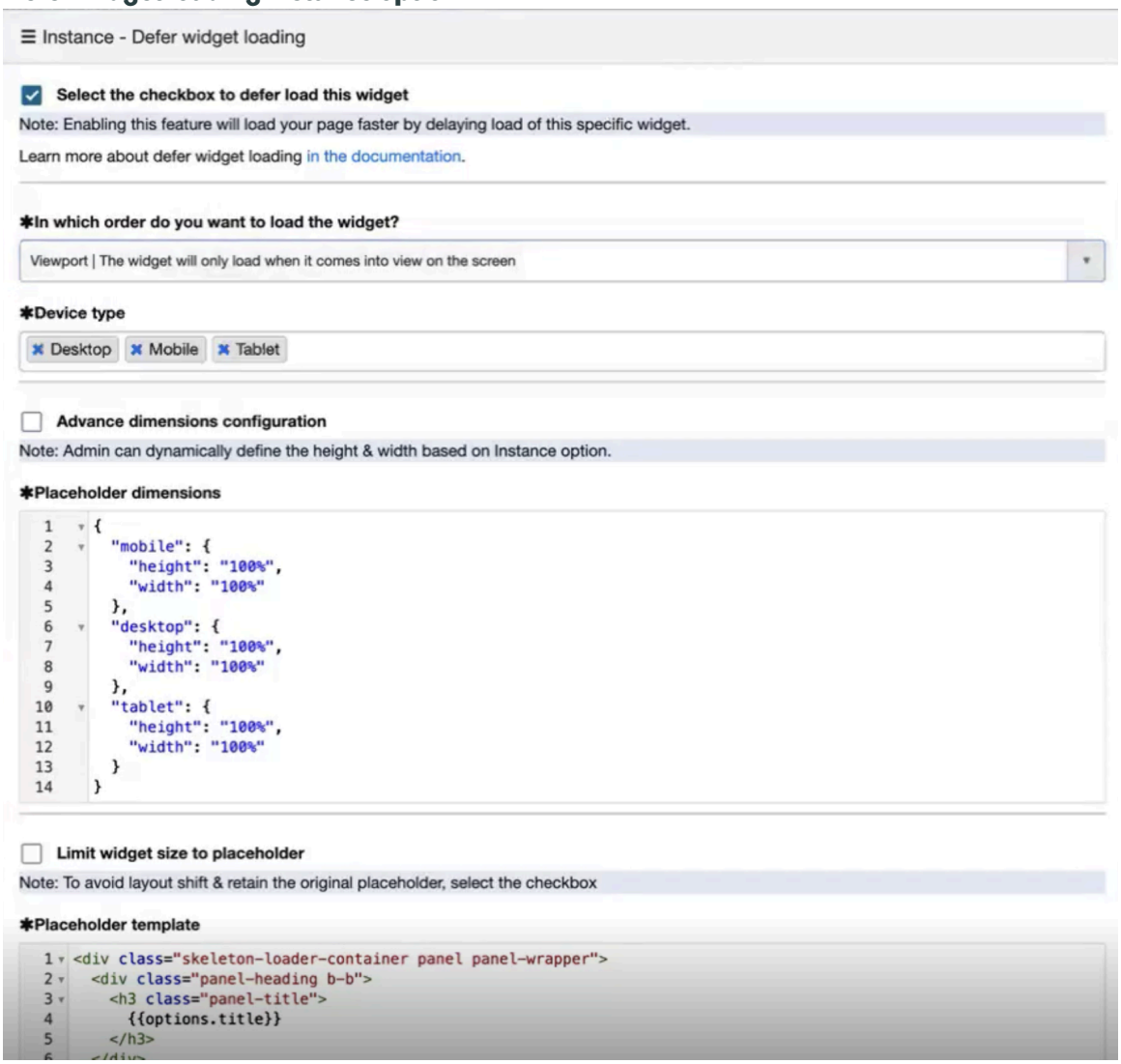
2. Click the **Defer load** icon.
3. Fill in the following fields as explained in Configure widget loading order in Service Portal.

Defer widget loading instance option



4. Click **Save**.

Result
Defer loading of the widget is enabled.

Setup Employee Center browse experience features

Make it easy for employees to navigate the portal and discover content using the browse experience features in Employee Center.

https://player.vimeo.com/video/1070134785?h=51930cab17&badge=0&autopause=0&player_id=0&app_id=58479

Follow these steps to setup browse experience features:

1. Define the content hierarchy via the taxonomy: Unified Taxonomy for Employee Center.
2. Configure how the taxonomy appears on the portal pages: Dynamic topic pages
3. Configure navigation menus:

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- Mega menu configuration
- Advanced Portal Navigation

To learn about the navigation menus, see

4. Configure the out-of-the-box widgets (optional): Configure browse experience widgets

   To view all the widgets installed with Employee Center, see Employee Center widgets.

5. Review the browse experience features table below and configure the features relevant to your use case.

Browse experience features

Feature	Description
Guided Self-Service in Employee Center	Empower employees with easier self-serve capabilities by deploying a series of prompts to guide employees to the correct knowledge article or request.
Cross-channel favorites	Cross-channel favorites offer quick access to frequently used content for employees, with sorting and customization options
Recommended for you	The Recommended for you widget displays catalog items and knowledge articles tailored to employees based on their profiles or popular content among similar users
Quick links	Quick links offer employees a way to quickly access internal and external resources related to specific departments within your organization.
Get support	Get support provides a central place to find resources within a home page widget or a modal window.

Unified Taxonomy for Employee Center

Unified Taxonomy is a collection of hierarchical topics that brings together different content types, such as requests, articles, quick links, learning content, and employee communications.

In the Employee Center portal, you can use this capability to span across departments to provide a single employee-centric taxonomy. Unified Taxonomy sits at the core of the browse experience in Employee Center. Set up the Unified Taxonomy to leverage the full potential of the browse experience.

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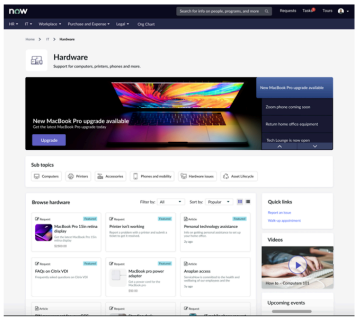
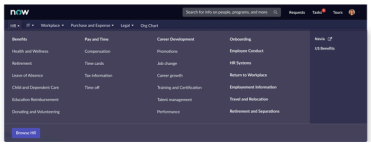
Curated Experiences

It drives employee-centric content discovery experiences across the portal

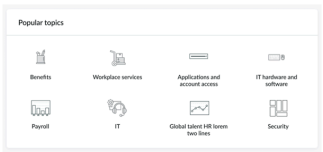
Dynamic Topic Pages



Mega Menu Navigation



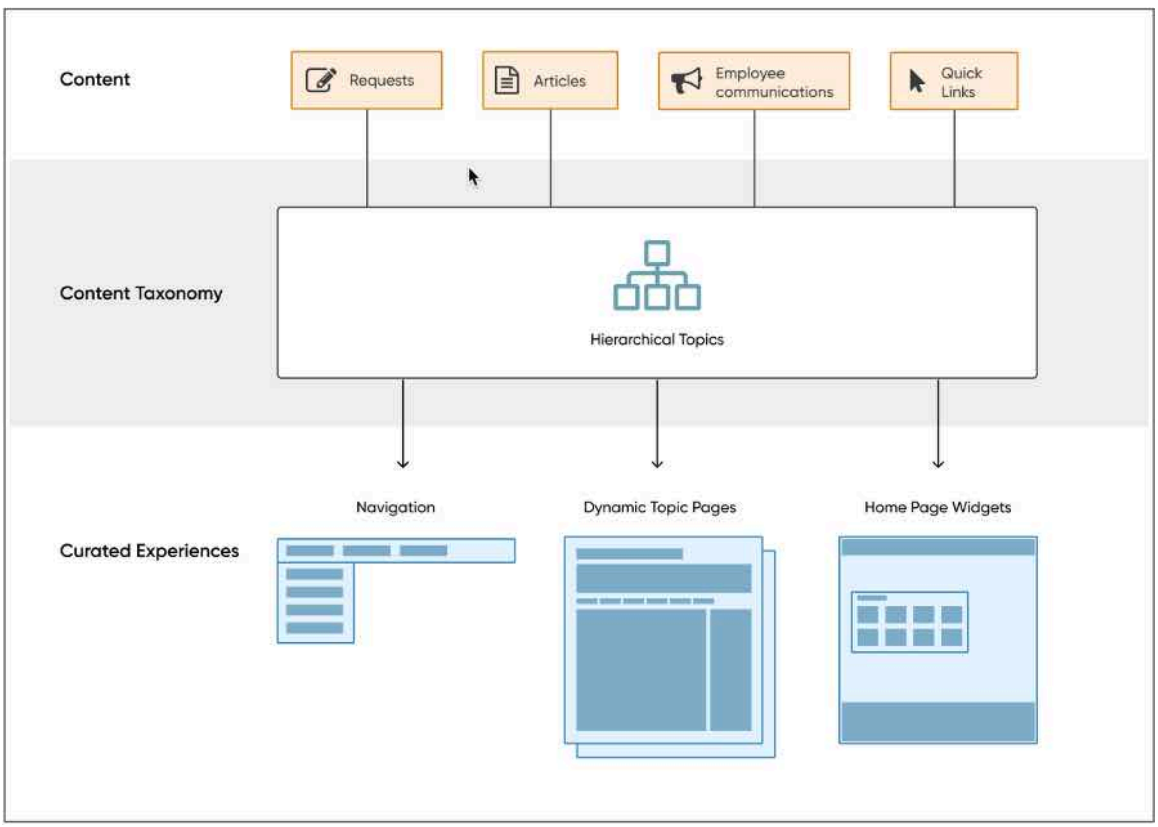
Home Page Widget – Popular Topics



Unified Taxonomy — the foundation of Curated Experiences

The Unified Taxonomy is built on these models.

- Content taxonomy (Data model): Provides the data model or the framework against which the content is mapped. This is the top-three levels of the topic. For example, **IT** > **Hardware** > **Printers**.
- Content Authoring (Taxonomy management): Provides content managers and contributors the ability to tag content against the taxonomy and manage the taxonomy.
- Taxonomy for employee content: Is the actual content mapped to the taxonomy. This provides the mapping to the default content shipped by IT, HRSD, and Legal into the content taxonomy.



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The Unified Taxonomy capability is delivered by ServiceNow AI Platform as two separate plugin and application.

Content Taxonomy

The application that provides the data model or the topic hierarchy and the taxonomy management (content authoring) capabilities for the Unified Taxonomy.

This application is available by default to all customers.

Employee Experience Taxonomy

The plugin that provides the mapping of all the default content for IT, HR, Workplace, Legal, and Procurement into the default content taxonomy. The content types mapped by default are requests, articles, quick links, learning content, and employee communications. Once the plugin is downloaded, this mapping will be visible as part of the content taxonomy app in the platform.

To get the default taxonomy for employee content, you must download it from ServiceNow Store. On installation, the default content taxonomy displays the available list of topics prescribed for the product or services based on what you are licensed to, such as IT, HR, WSD, PSM, or Legal.

After you complete the installation, perform the following to achieve a Unified Taxonomy experience.

- Clone the employee content taxonomy and make appropriate additions or modifications to the provided topic structure. Taxonomy is updated to reflect the terminology and available services. For more information, see Clone taxonomy for employee content.
- Associate all the existing and new content to the cloned taxonomy topics. For more information, see Create and associate topics.
- Enable user criteria to configure topic-level security and visibility settings for topics. For more information, see Enable user criteria for topics.
- Update the search configurations to filter based on the content associated to the cloned taxonomy.

Related topics

Taxonomy form

Clone taxonomy for employee content

Clone the taxonomy that is provided out-of-the-box to make your own additions or modifications to the provided topic structure that aligns to your unified portal needs.

Before you begin

Role required: taxonomy_admin

About this task

By default, Employee Center application ships employee-centric taxonomy and taxonomy topics for IT, HR, Workplace, Legal, and Procurement.

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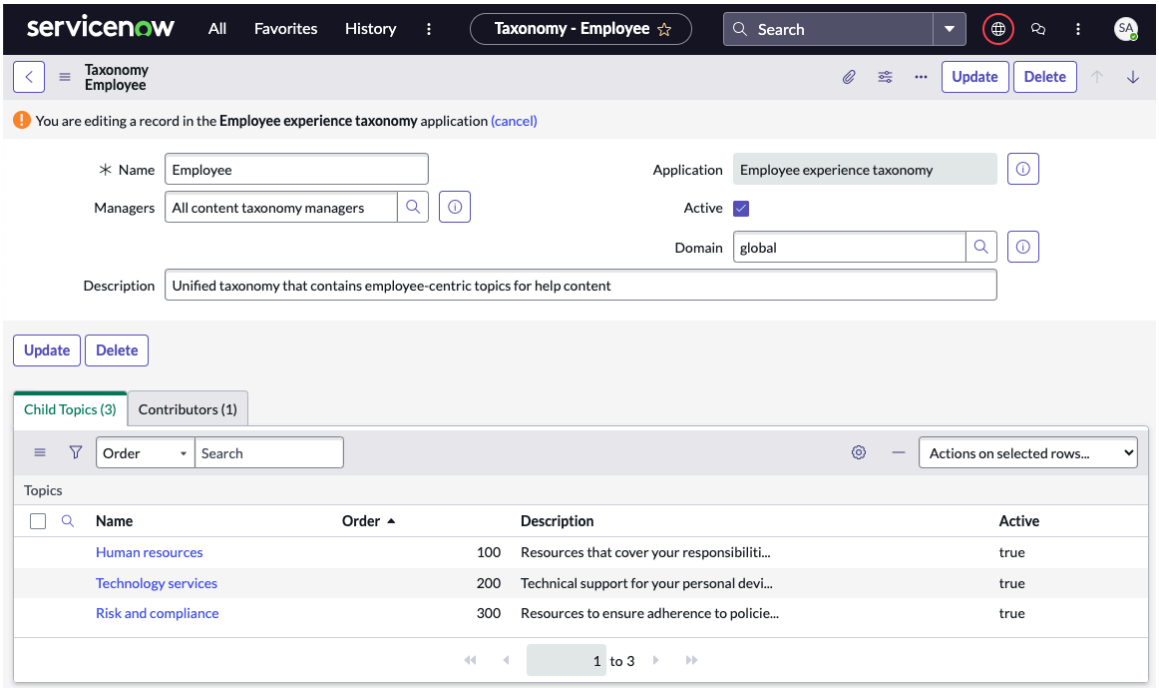

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Taxonomies**.
2. Click the default **Employee** taxonomy.
3. Click **Clone**.
4. Enter the **New Taxonomy Name** in the dialog box that appears and click **OK**.
   This copies the taxonomy and its contents to the new taxonomy. *Optionally*, you can manually create a taxonomy and add your topics. For more information, see, Create taxonomy
5. Modify the taxonomy content and click **Update**.
6. Associate all existing and new content to the cloned taxonomy topics.
7. Associate the taxonomy to the portal that is created.
8. Deactivate the existing taxonomy so that the search configurations pick up the content from the new taxonomy.

Create taxonomy

Create taxonomy for employee content to map the content of your product or services to the taxonomy hierarchy.

Before you begin

Role required: taxonomy_admin

Note: **Content Taxonomy** module may be visible to all users but you must have admin privileges to make any changes.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Taxonomies**.
2. Click **New** or edit an existing record.
3. On the form, fill in the fields.

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For more information on the fields and description, see Taxonomy form.

4. Click **Submit**.

What to do next

Associate all existing and new content to the taxonomy created.

Note: By default, taxonomy for Employee Center and Employee Center Pro Kiosk are available.

Create and associate topics

Create topics that you want to associate with the new or cloned taxonomy.

Before you begin

When you have a lot of topics, ensure you set up user criteria for your topics.

Role required: taxonomy_admin

User criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

Procedure

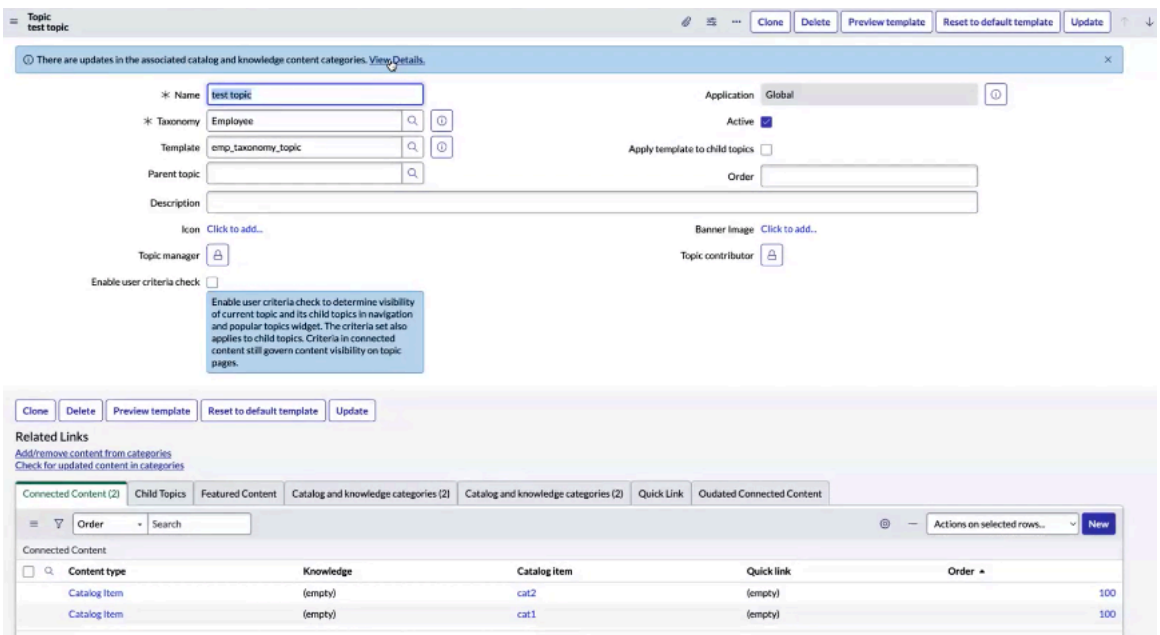
1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information on the fields and description, see Topic form.

   Note: For better topic discovery and search results, avoid special character **/** and ensure you re-index the content after topic name edits.

4. Select **Enable user preference check** to set topic-level visibility and security.

   Important: The Topic-based access control is available for Yokohama family release and beyond. For more information, see Enable user criteria for topics.

User criteria and related tabs



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Note: This image is for illustration purpose only. Tab display depends on your implementation.

For more information, see Enable user criteria for topics.

Note: When you clone or move a topic, the associated guided self-service also is cloned or moved accordingly.

5. Click **Submit**.

Note: Topics are visible only when content is associated with it.

What to do next

Create child topics for the parent topic. For more information, see Create a child topic. Go to the tabs to associate the topic appropriately.

You can review and manage content updates and outdated connected content from the notification and tabs. For more information, see Manage connected content from topic pages.

Related topics

Taxonomy and connected content

Associate connected content to a topic

Enable user criteria for topics

Create a child topic

Create child topics for the parent topic in the taxonomy.

Before you begin

Role required: taxonomy_admin

User criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click and open the parent topic to which you want to add a child topic.

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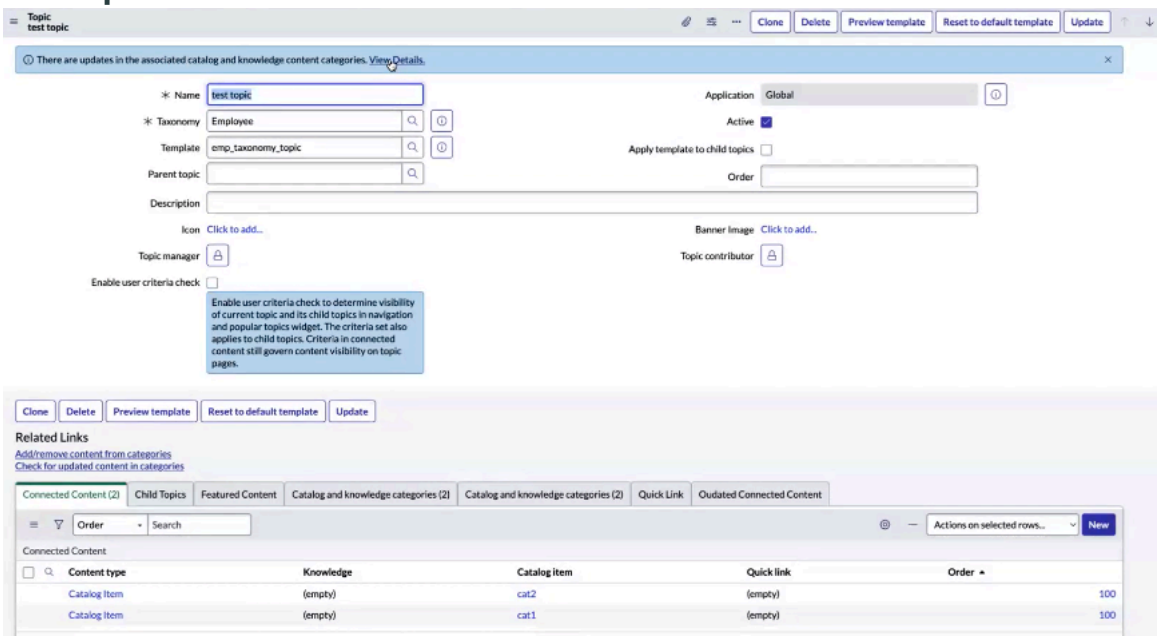
Child topics tab



3. On the **Child Topics** tab, click **New**.
4. On the form, fill in the fields.
   For more information on the fields and description, see Topic form.
5. Click **Submit**.

Related topics

Associate connected content to a topic

Associate connected content to a topic

Associate all existing and new content to the cloned taxonomy topics. You can add catalog items, knowledge bases, and quick links to the topics.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Connected Content**.
2. Click **New**.

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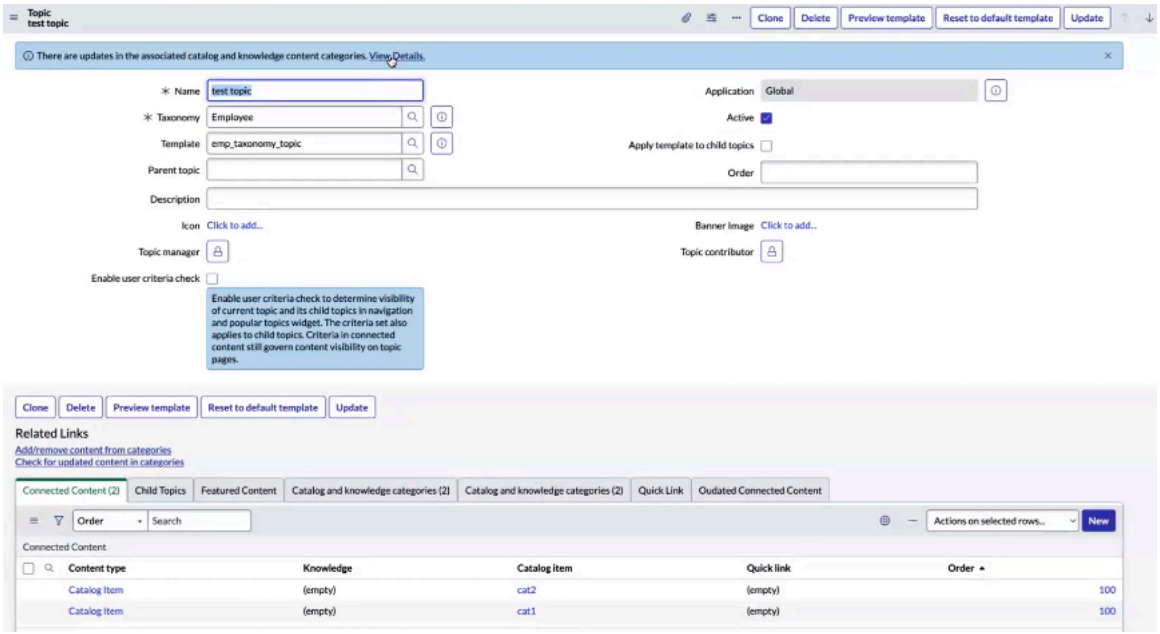
Connected content tab



3. On the form, fill in the fields.
   For more information on the fields and description, see Connected Content form.
4. Click **Submit**.

What to do next

For more information, see Taxonomy and connected content.

Associate content categories to topics

Associate content from multiple content categories to a topic in the taxonomy.

Before you begin

Role required: knowledge_admin, taxonomy_admin

User criteria required: Taxonomy Manager.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Select the topic where you want to associate a content category.
3. Select the **Add/remove content from categories** related link.
4. Select one of the following **Content types**
   - Knowledge Categories
   - Catalog item Categories
5. In the corresponding collection list window, do one of the following actions:
   - Select a category and then click the right arrow icon ( ) icon.
   - Double-click a category.

> **Note:** In the Collection list, you can search for knowledge or catalog categories by entering the category name or by using wild cards (*).

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6. Click **Save**.
   When you associate a category to a topic, all the Knowledge Base articles or Service Catalog items belonging to the selected categories are associated with the topic.

   Note: The time taken to associate all the content with a topic depends on the number of Knowledge Base articles or Service Catalog items that a category contains. This is a one-time activity.

What to do next
For more information, see Taxonomy and connected content.

Related topics
Taxonomy and connected content

Define a knowledge article category

Associate content from catalog categories to a topic

Associate content from multiple catalog categories to a topic in the taxonomy.

Before you begin
Role required: catalog_admin, taxonomy_admin, or any user that meets the Taxonomy Manager user criteria in the Employee taxonomy

Procedure
1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click the topic that you want to add content from catalog categories to.
3. Click the **Add content from a catalog category** related link.
4. In the Collection list, do one of the following to move the catalog categories to the Catalog Categories list:
   - Select a catalog category and then click the right arrow icon ( ) icon.
   - Double-click a catalog category.

   Note: In the Collection list, you can search for catalog categories by entering the category name or by using wild cards (*).

5. Click **OK**.
   All the catalog items that belong to the categories that you moved to the Catalog Categories list are associated with the topic. The time taken to associate all the content with a topic depends on the number of catalog items that a category contains. This is a one-time activity.

What to do next
For more information, see Taxonomy and connected content.

Related topics
Service catalog categories

Associate featured content to a topic

You can mark connected content as featured content for a topic. The featured content appears at the top of the topic page, enabling you to easily view content that requires your attention.

Before you begin
Role required: admin

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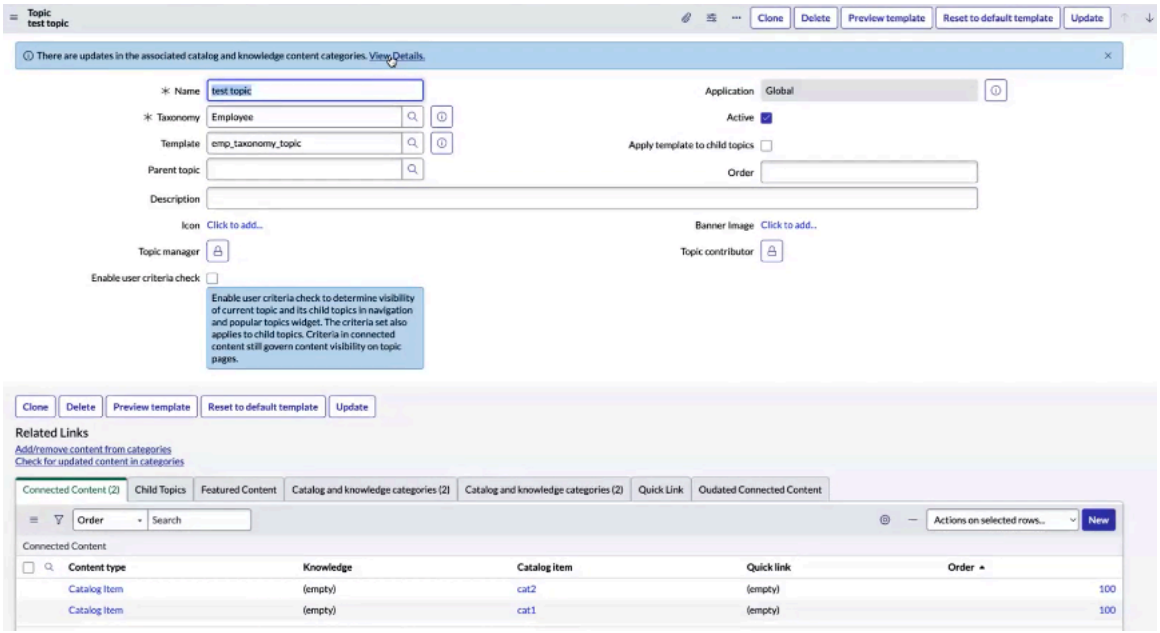
Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click and open the topic to which you want to associate featured content.
3. On the **Featured Content** tab, click **New**.

Featured content tab



4. On the form, fill in the fields.
   For more information on the fields and description, see Featured Content form.

   Note: You can't add a quick link as a featured item.

5. Click **Submit**.

Associate a quick link to a topic

Associate quick links to topics to quickly view important content, such as knowledge articles, catalog, items, internal pages, and external links.

Before you begin

Role required: taxonomy_admin

User criteria required: Taxonomy Manager.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click and open the topic to associate with a quick link.
3. On the **Quick Link** tab, click **New**.

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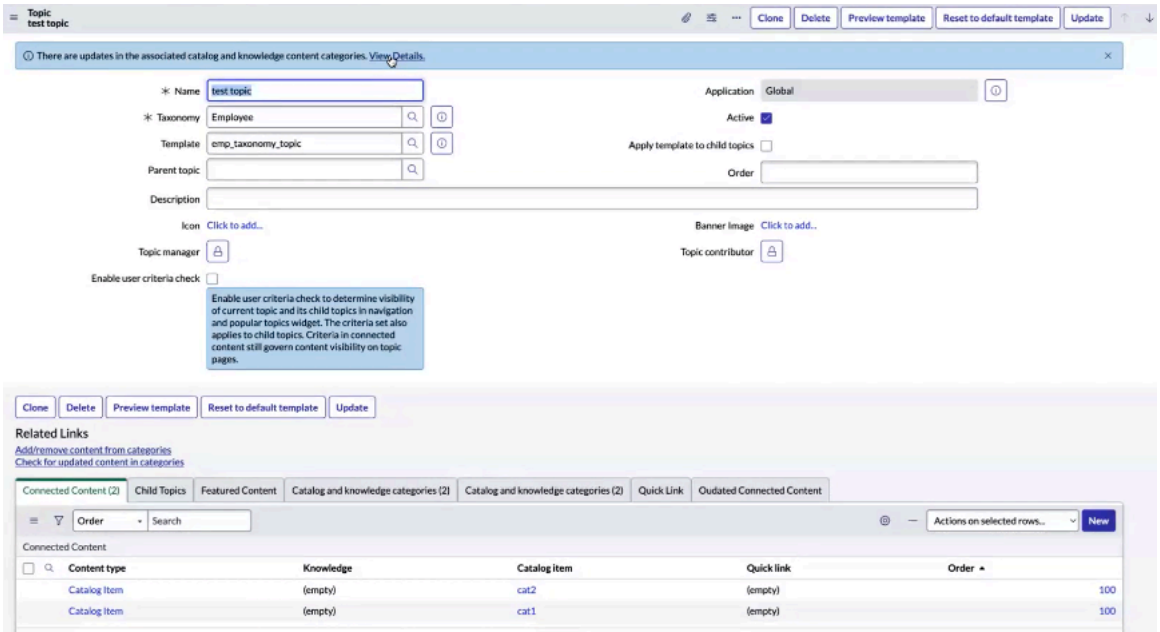
Quick link tab



4. On the form, fill in the fields.
   For more information on the fields and description, see Quick Link form.

   Note: You can't add a quick link as a featured item.

5. Click **Submit**.

Related topics

Create a quick link

Assign topics to a quick link

Associate learning content to a topic

Add learning content to a topic page to provide employees with quick access to training and career development.

Before you begin

Role required: taxonomy_admin

User Criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

Do the following steps:

1. Install the Learning [sn_lep] application: Install and configure Learning
2. Provide employees with the Talent Development license to enable access to the learning content: License Talent Development Core users
3. Navigate to the **Scheduled jobs** > **Refresh access to all apps** and click **Execute Now**.

   This adds a new record to the Employee Application Access [sn_employee_app_access.list] table.

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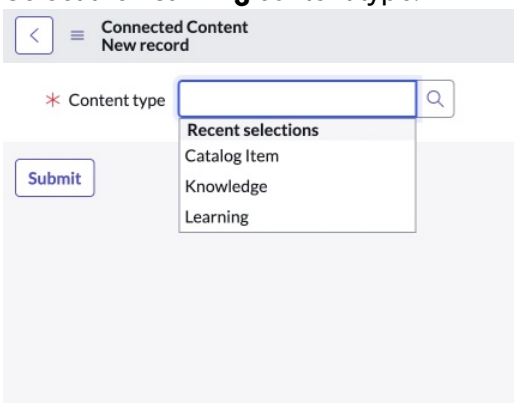
About this task

The Topic Content widget displays the connected content associated with that topic, such as Knowledge Base articles, courses, and Service Catalog request items.

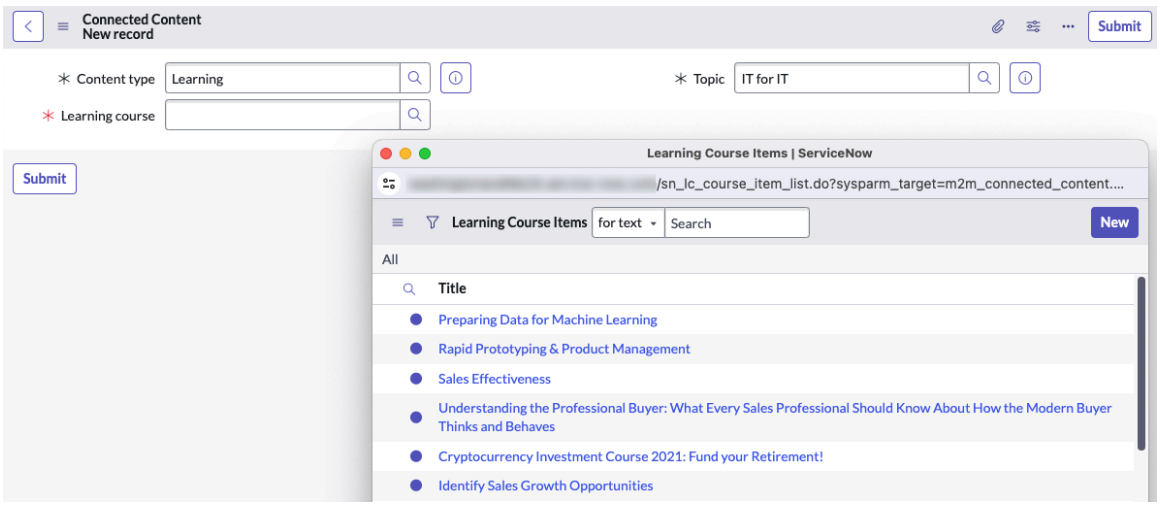
Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Select any topic and go the **Connected Content** and click **New**.
3. Select the **Learning** content type.



The **Learning course** field appears.

4. Select the course.



5. Click **Submit**.

Result

Employees with Talent Development license can now access the learning content on the topic page.

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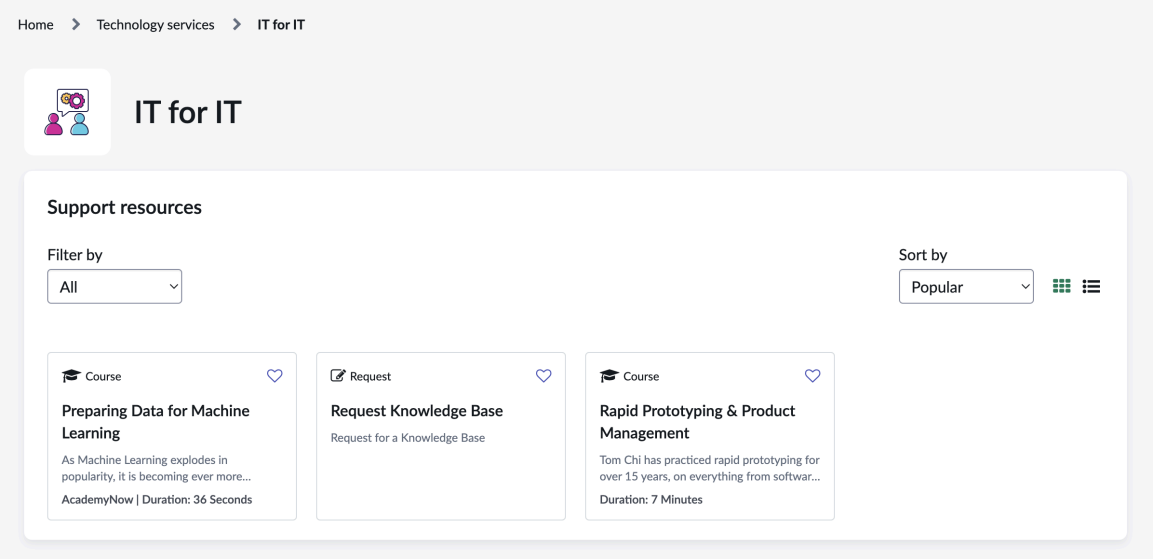

Associate Guided Self-Service Process to a topic

You can make Guided Self-Service available from a topic. The GSS content appears on the topic page enabling your employees to easily self-serve.

Before you begin

Role required: admin, topic manager, taxonomy manager or contributor

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click and open the topic to which you want to associate the GSS content.
3. On the **Guided Self-Service Process** tab, click **New**.
4. On the form, fill in the fields.

Guided Self-Service process form

Field	Description
Guided Self-Service process	Guided Self-Service process associated with the topic. Search for and select the Guided self-service process associated with the topic.
Topic	Topic in which you want the Guided Self-Service process to appear.
Order	Order in which you want the Guided Self-Service process to appear.

Note: When you associate a guided self-service process to a sub-topic, the guided help also appears on its parent topic.

5. Click **Submit**.

Result

The GSS content appears on the topic page enabling your employees to easily self-serve.

Related topics

Guided Self-Service reference

Use Guided Self-Service

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Enable translated topic path updates

Improve the accuracy and reliability of topic translations with a new system property that helps keep translated topic paths up to date automatically.

Before you begin
Role required: admin

About this task
This new system property helps keep translated topic paths up-to-date automatically and enable access to the latest localized content or multilingual topic structures.

- Ensure that topic paths and topic names changes are reflected in other languages.
- Capture the last run time of the *`Generate topic path translations`* job.
- Track translations for localized Employee Center experiences.
- Improve reliability of the translated content during updates or content restructuring.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Search for the translated topic path tracking property `taxonomy.topic_path_translations_job_last_run` and open.
3. Set the property value to **true**.

Result
The system property tracks translation of topic names and path updates automatically. Employees can access localized or region-specific content with the latest topic labels and navigation paths.

Enable user criteria for topics

Enable user criteria to configure topic-level security and visibility settings for topics.

Before you begin

Important: The Topic-based access control is available from the Yokohama family release.

When you have many topics, ensure you set up user criteria for your topics for performance improvement.

Role required: taxonomy_admin

User criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

About this task
Organizations can define who the topic page is **Available for** and **Not Available for** at each topic level, avoiding the need to evaluate content-level access to determine topic visibility. Organizations can make subtopics automatically inherit the same access levels as the parent topic or define their own criteria. Before you configure topic-level visibility, understand the following user criteria basics:

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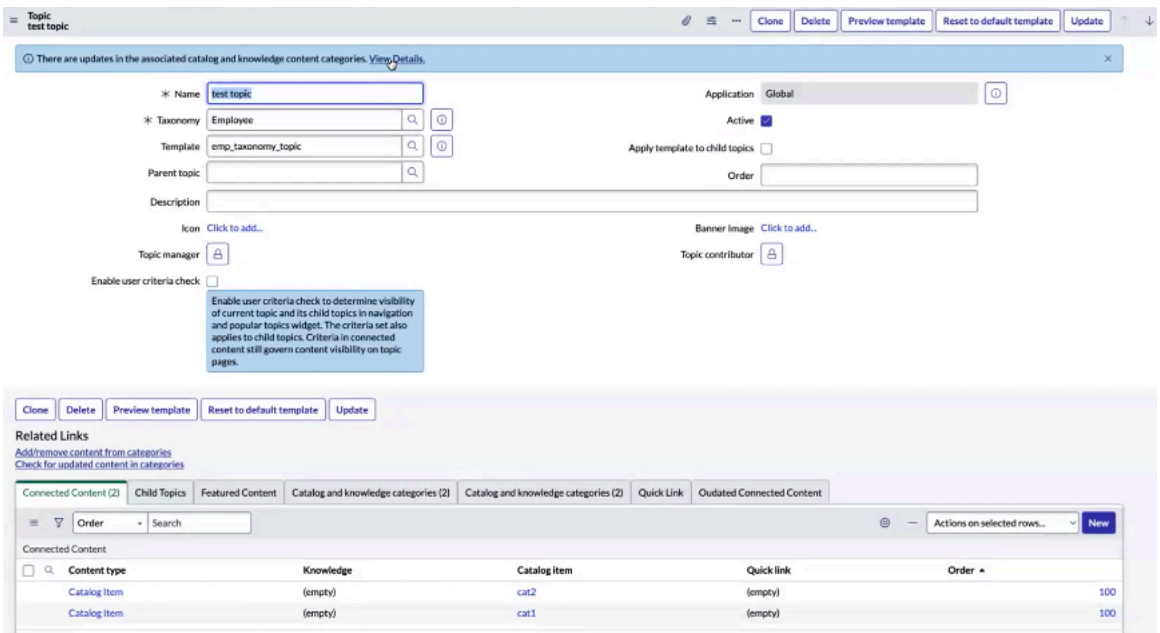
- Add topic-level hierarchy controls on each topic page overriding the default content-based security for megamenu.
- Remember that the topic visibility on the Mega menu and Popular topics is driven by the **Enable user criteria check** option.
- Enable this option on the parent topics and the subtopics inherit the same user criteria automatically.
- Remember that when you disable the topic user criteria toggle, the content security model is applicable.
- Simplify the user criteria and improve the page load time.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Click **New**.
3. Configure the topic form, see Topic form.
4. Select **Enable user criteria check** to set user criteria at topic-level.

User criteria and related tabs



Understand how it works from the message.

```
Enable user criteria check to determine visibility of the
 current topic and its child topics in navigation and popular
 topics widget. The criteria set also applies to child topics.
 Criteria in connected content still govern content visibility
 on topic pages
```

and proceed to add criteria for the following options:

- **Available for**: Users or user group for whom the topic is visible.
- **Not available for**: Users or user group for whom the topic isn't visible.

After you enable this option, the user criteria fields are available for the entire hierarchy that is root-topic and all its child-topics.

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Note: When you turn this **Enable user criteria check** option ON the first time, the default values for Available for and Not available for are empty, which means that the topic isn't accessible by any user. Ensure you define the user criteria for the topic to be visible. When you don't specify any values, the topic isn't visible on the mega menu.

5. Specify the user criteria **Available for** and **Not available for** options based on your business needs.
   Understand how the user criterion works in the following use cases:

   User criteria use cases

Scenario	How the user criteria works
When a new topic is created with no parent	User criteria and visibility remain same as defined at the time of creation.
When a new topic is created with parent	User criteria and visibility of parent is applied to the new topic.
When a topic is moved to a new parent	User criteria and visibility of new parent are applied and old parent criteria are removed. Manual edits remain intact.
When a topic is moved out of a hierarchy and made root topic (new hierarchy).	User criteria and visibility remain same as defined at the time of creation.
When a topic is cloned to a new parent with empty user criteria.	User criteria and visibility of the topic are empty.
When a topic is cloned to a new parent with non-empty user criteria.	User criteria and visibility of the new parent override the cloned topic.
When user criteria and visibility of parent change	The revised user criteria and visibility are applied to its children.
When user criteria is enabled for favorites	Employee (for whom the topic isn't available for) isn't able to view the favorited topic. The following message appears `You don't have access to <count> of your favorited items`. For more information, see Configure favorites option.
When a new topic is cloned and made root topic	The cloned topic user criteria and visibility are empty.

   Note: When the user criteria applies on the favorited topic, where the topic isn't visible under **My Favorites**.

6. Click **Submit** or **Save**.

   Note: Topics are visible based on the user criteria associated with it. For more information, see the *`Favorites card and access`* illustration on Configure favorites option.

Result
User criteria changes are available only after relogging. Proceed to check the topics visibility from the Employee Center portal.

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What to do next

Create child topics for the parent topic. For more information, see Create a child topic. Go to the tabs to associate the topic appropriately. Child topics inherit the user criteria of the parent topic however admin can update the child-topic criteria separately as per business needs.

Note: When you clone or move a topic, the associated guided self-service also is cloned or moved accordingly.

Taxonomy and connected content

Using the taxonomy and content personas, you can keep track and manage the new content updates on the topic pages. Connect new content to the categories linked to the topics. Monitor the categories to track new content available as the associated connected content types.

Gain visibility into new and invalid content and manage content life cycle through automation for performance improvement.

You can make the topic pages include the most updated content available for the employees.

- The taxonomy and topic managers can add, remove, move, and review new content available for the connected content types associated to the categories.
- You can manually review, add, or dismiss the content updates from the notifications and the **Associated catalog and kb categories** record.
- Track and manage outdated connected content from a dedicated the **Outdated Connected Content** tab. This feature is available from the Zurich family release.
- Alternatively, you can also autosync the new content updates by enabling a **Taxonomy category content autosync** system property.
- The connected content types supported for the features are Knowledge Base articles and Service Catalog items.

Connected content is available on the Browser Extension for Employee Center. For more information, see Browser Extension for Employee Center.

Manage connected content from topic pages

Link your desired categories to the topics and track the additions and removals to have easier management of unconnected content.

Before you begin

Role required: taxonomy_admin

User criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

About this task

A Fix script is shipped with the feature that automatically runs when you upgrade. Link your desired categories to the topics manually, for new installations, for new taxonomy created, or for new categories required on the existing taxonomies.

- The script goes through all the connected content on the topics and identifies the categories for the connected content.
- The fix script works for all the active taxonomies.
- The **Catalog and knowledge Categories** tab displays the identified categories to be linked to the topics, after the fix script is successfully executed.
- Linking a category to a topic bulk-connects all its connected content to the topic.

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A weekly scheduled job runs to recognize new content added or removed from the category that can be associated to the topics.

For more information on the execution and modification of the scheduled job, see

- Run the scheduled job for content association and Check for updated content in categories for manual checking and updation of each record.
- Enable connected content autosync system property for autosync.

Important: The connected content management is available from the Zurich family release.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Go to the **Catalog and knowledge Categories** tab on your desired topic page to add another category, and select **Edit**.
   The following are the available fields on the tab:

   Configuration fields

Field	Value
Content type	Catalog Item, Knowledge Base
Connected Category	Category linked to the topic pages based on the content type
Available content for association	The number of new content items detected on the linked categories

3. Select the **Content type** in the pop-up window and select the category to link to the topic page.
   https://player.vimeo.com/video/1172739373?h=ed81d7189c&badge=0&autopause=0&player_id=0&app_id=58479
   All the content in the category is associated with the topic.
4. You can perform the following content actions:

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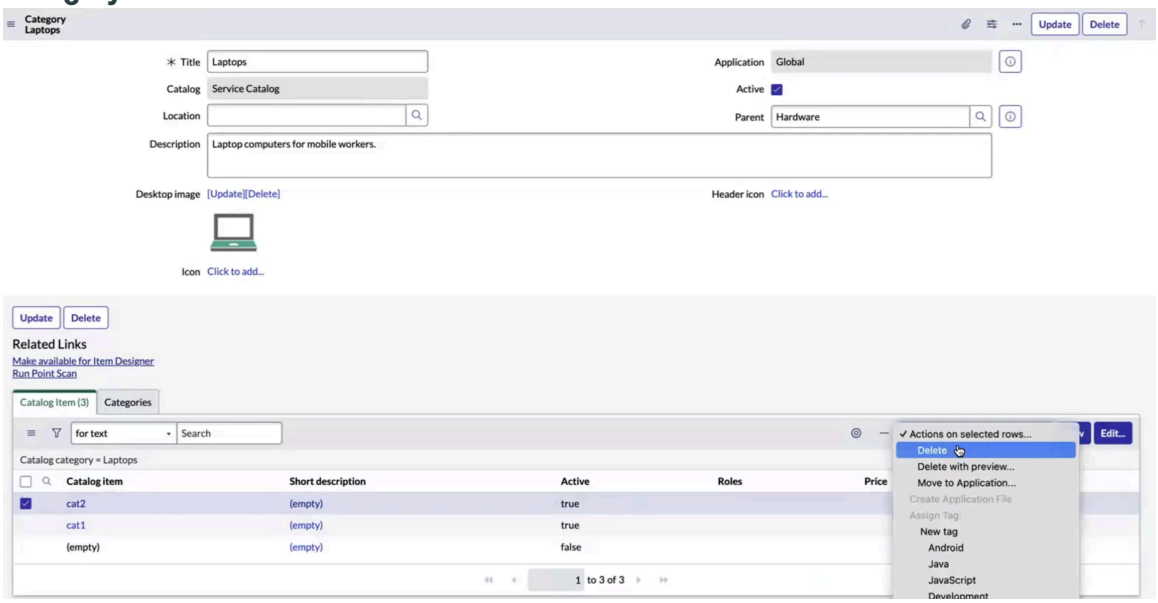
a. Go to **Category** and the related list **Catalog Item** > **New** to add the record.

b. Go to **Category** and the related list **Catalog Item** > **Actions on selected rows** > **Delete** to remove the record.

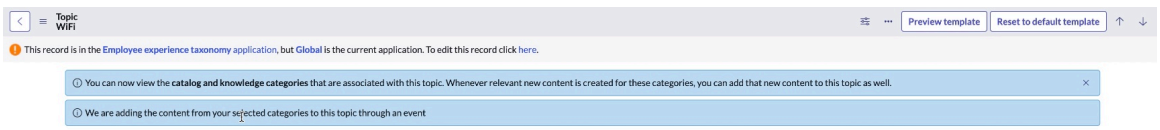
Category removal



5. Run the scheduled job for content association to surface the unconnected content of categories.
6. Select **Save** or **Reload form** the topic page.

   A confirmation message appears on the screen.

Confirmation notifications



7. Select **View Details** on the pop-up notification displayed on the topic page to see the content additions and removals available.
8. **Optional:** Go to **Associated catalog and kb categories** to see the **Update Type**, such as Added or Removed content in the categories.

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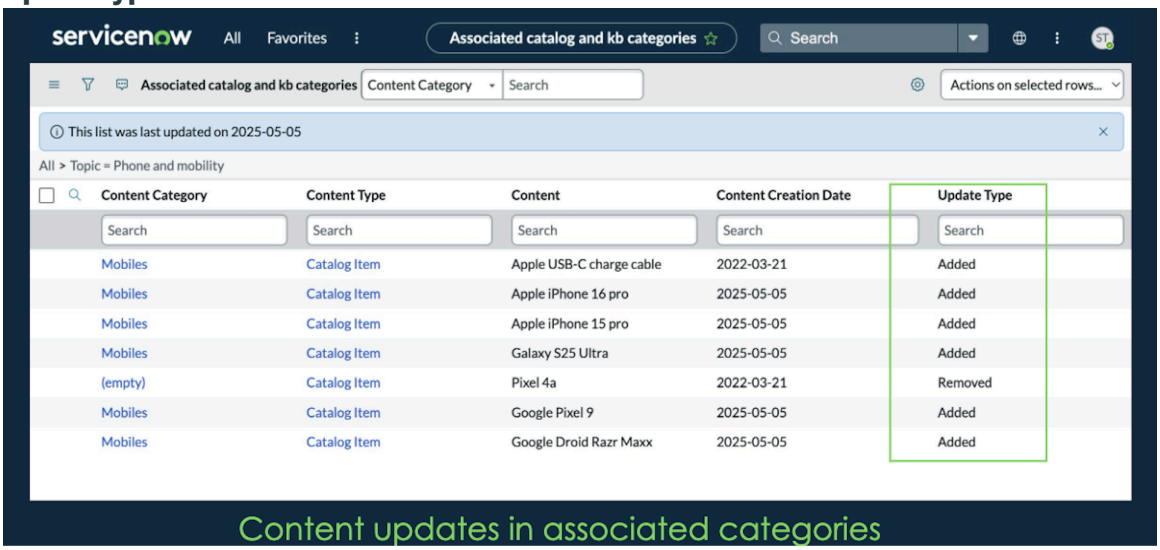
Update type: Add and Remove

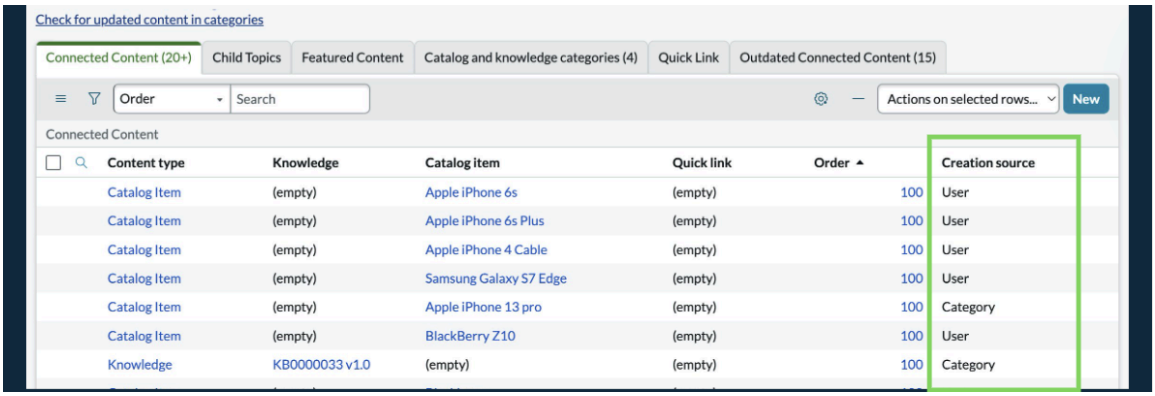


9. Add or dismiss content, as required, with **Update topic with content** or **Dismiss content** respectively.

Result
Access all the connected content to the categories linked to the topic pages.

What to do next
Click **Check for updated content in categories** related link to see the content creation source.

Connected content creation source



Creation source helps you distinguish and manage the content added from **Category** or by **User**.

Run the scheduled job for content association

Change the scheduled job frequency, as required, to ensure that the notification of new content availability to add to the topic pages is regular and uninterrupted.

Before you begin
Role required: admin

About this task
Surface New Unconnected Content of Categories helps you identify the new unconnected content.

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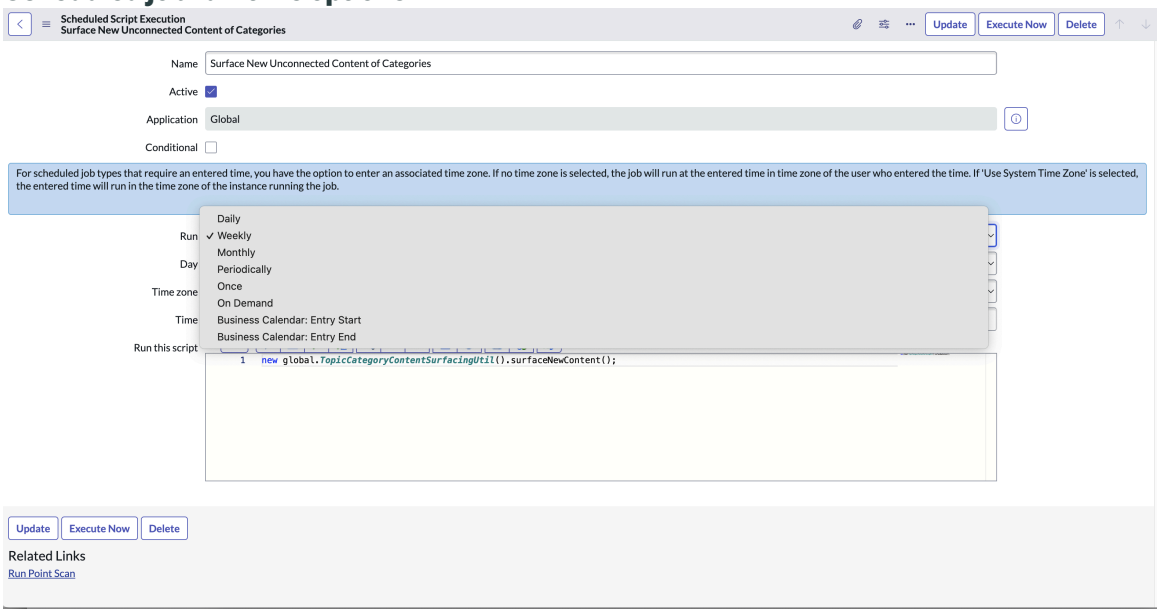
- Use the scheduled job for manual additions and removals of content.
- Enable connected content autosync system property for automatic additions and removals of content.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs** > **Surface New Unconnected Content of Categories**.
2. Select your preferred **Run** time option, for the scheduled job, from the available list on the field.

Scheduled job run-time options



Note: The default scheduled job run-time is weekly. Edit and update the frequency of execution, as required.

3. Select **View Details** on the pop-up notification displayed on the topic page to see the new content available for association or removal..

New content availability notification



4. **Optional:** View **Associated catalog and kb categories** to see the **update type**, such as Added or Removed.

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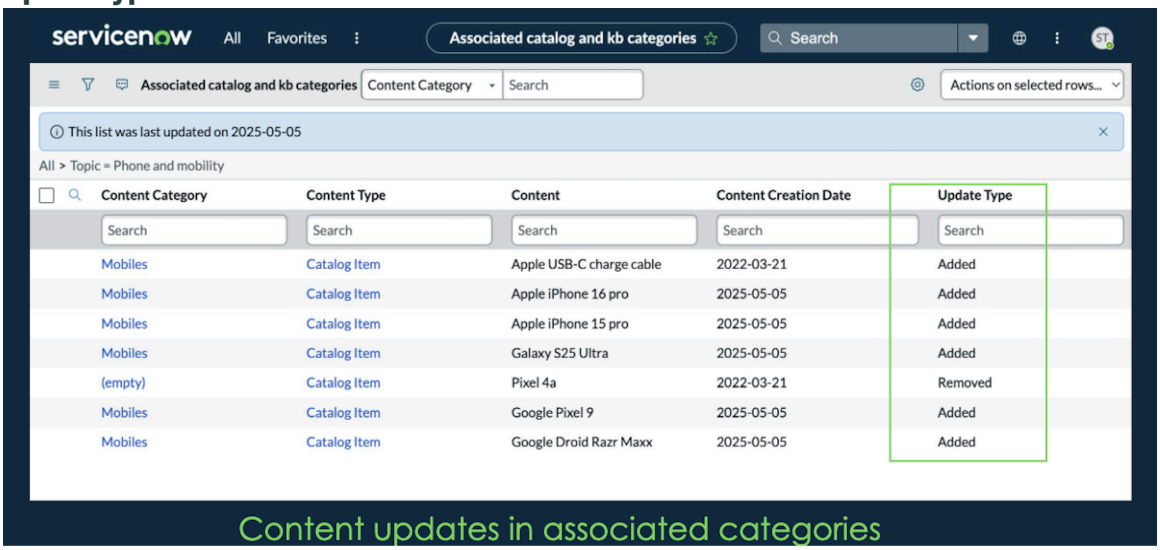
Update type: Add and Remove



5. Add or dismiss content, as required, with **Update topic with content** or **Dismiss content** respectively.

Enable connected content autosync system property

Content updates are automatically synced when you enable the autosync system property.

Before you begin

Role required: admin

About this task

By enabling this property, you can gain visibility into new and outdated content and manage content life cycle through automation for performance improvement.

- Auto-sync content additions and removals on topic pages in bulk.
- Eliminate the need to manually update the content additions and deletions. For more information, see Run the scheduled job for content association.

Procedure

1. In the Navigation filter, enter `sys_properties.list`.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Search for the `Taxonomy.category.content_auto_sync` property and open.
3. Set the property value to **true**.

> **Note:** Default value is **false**.

Result

The system property syncs updates automatically.
However, to check the updated content in categories manually, see Check for updated content in categories.

Check for updated content in categories

Track and manage the updated content in categories for better visibility, content maintenance, and performance.

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Before you begin

Role required: knowledge_admin, taxonomy_admin

User criteria required: Taxonomy Manager.

About this task

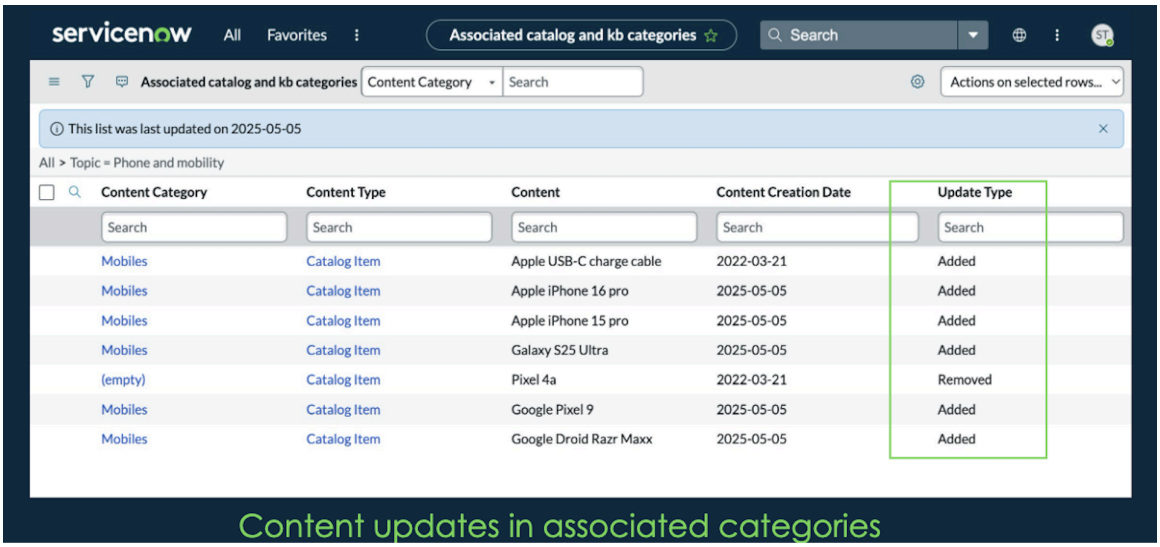
The related list **Check for updated content in categories** is available only when you do not Enable connected content autosync system property. As the system property automatically adds or removes the content updates, you can't check for individual updates manually.

For manual checking of updates, follow these steps.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Select the topic where you want to associate a content category.
3. Select the **Check for updated content in categories** related link to see the content that's added or removed.

Content additions and Removals



4. Add or dismiss content, as required, with **Update topic with content** or **Dismiss content** respectively.
5. Click **OK**.

Related topics

Manage connected content from topic pages

Manage outdated connected content

Improve performance by tracking and removing outdated content from connected content from a dedicated tab. .

Before you begin

Important: The outdated connected content management is available from the Zurich family release.

Role required: taxonomy_admin.

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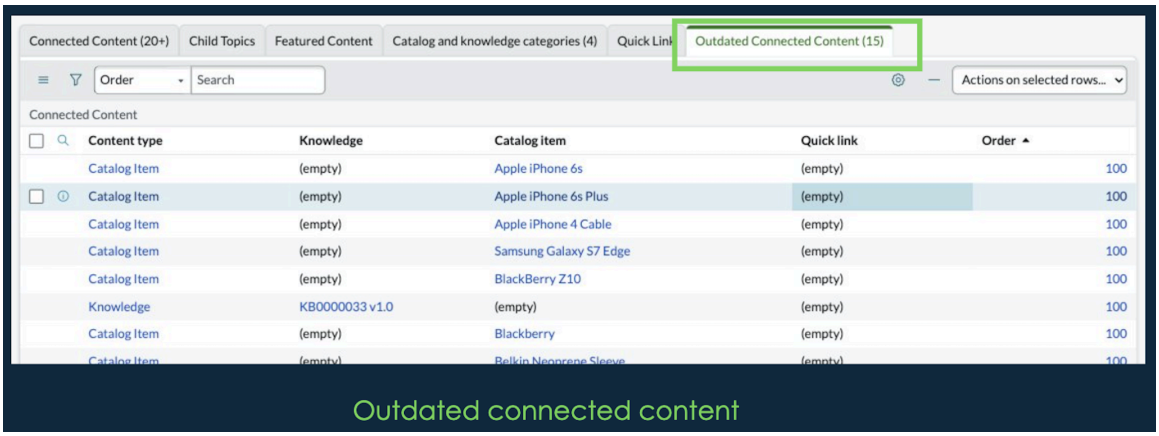
User criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

About this task

Outdated content refers to obsolete, invalid, or stale content that is no longed aligned to user needs or organizational priorities.

- Use one-click and bulk actions to remove all outdated content associations while preserving source content.
- Manage content integrity and improve system performance.
- Gain visibility and optimize content operations.

Outdated connected content tab and interface



Procedure

1. Go to **All** > **Content Taxonomy** > **Content Configuration**.
2. Click one of the following records.
   - **Knowledge**
   - **Catalog**
   - **Quick links**

   Taxonomy content configuration information appears along with the related list.
3. Select one of the following tabs:

Configuration fields

Field	Value
Connected Content	Connected content table, reference information, and display filter of the selected record.
Connected Category	Category linked to the topic pages based on the content type.
Outdated Connected Content	The number of outadated content records detected on the linked category.

4. Go to the **Outdated Connected Content** tab to use the default conditions.

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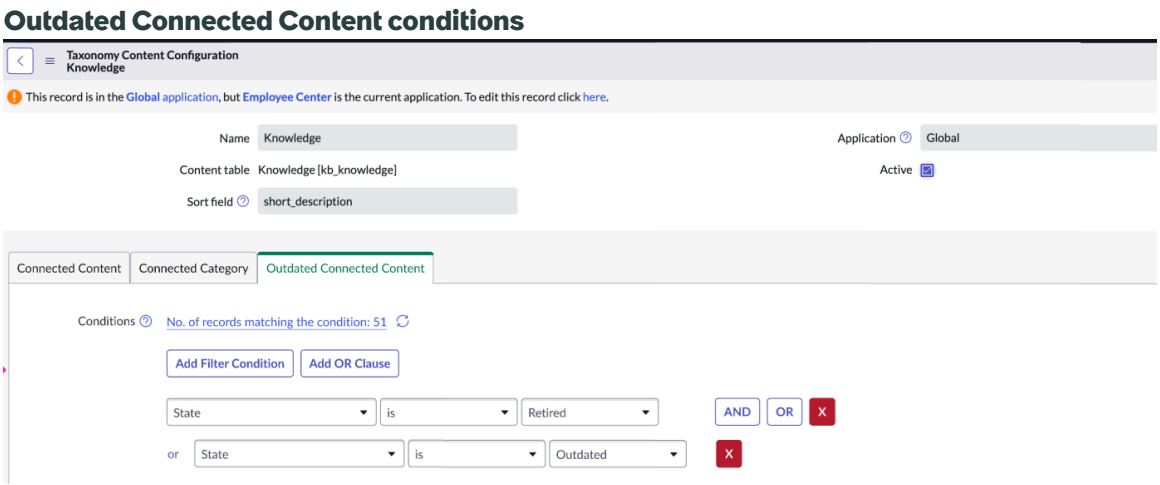

5. Customize the filter conditions to suit your requirements.
6. Click **No. of records matching the condition** to see the outdated content.
   When appropriate conditions are selected, all the outdated content appears in the matching records for you to manage.

Result

Based on the filter conditions, the outdated, retired knowledge, and inactive catalog items appear under the **Outdated Connected Content** related list.

Note: When a category has outdated content, then the same isn't associated to the topic. Ensure you mark the connected catalog item as active to be able to associate.

What to do next

To see a full list, go to **All** > **Content Taxonomy** > **Outdated Content Configuration**View **Connected Content View:Outdated Connected Content** to see the list.

You can proceed to manage the outdated content manually or automatically. Here's what you can do:

- (For topic-level outdated content) Go to **All** > **Content Taxonomy** > **Topics**, click **Outdated Connected Content** tab, and select the outdated content to delete.
- (For a full-list of outdated content across topics and taxonomies) Go to **All** > **Content Taxonomy** > **Outdated Content Configuration**, and select the outdated content to delete.

Review and delete outdated content across all topics and taxonomies with an automated option through a scheduled job.

Note: When you delete, only the association with the topic and taxonomies is removed. The actual catalog item or the knowledge article is not deleted.

For more information, see Run the scheduled job for outdated content.

Run the scheduled job for outdated content

Auto-delete the outdated content by marking the schedule job active. Once the schedule job is active, all the outdated content is removed automatically.

Before you begin

Role required: admin

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About this task

Reduce maintenance overhead with the scheduled job or alternatively Manage outdated connected content manually.

- Run the cleanup at a regular interval with a scheduled job.
- Send email notifications to taxonomy admins about the cleanup.
- Auto-delete the invalid and outdated content for performance improvement.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs** > **Automated Outdated Connected Content Cleanup**.
2. Mark the state to **Active**.

   Note: By default, schedule job is **inactive**.

3. Select your preferred **Run** time option, for the scheduled job, from the available list on the field.

   Note: The default scheduled job run-time is monthly. Edit and update the frequency of execution, as required.

Result

When the job is complete, the taxonomy admins receive the following email notification with the subject line **Cleanup of Outdated Connected Content** along with the details indicating the total items removed, if any.

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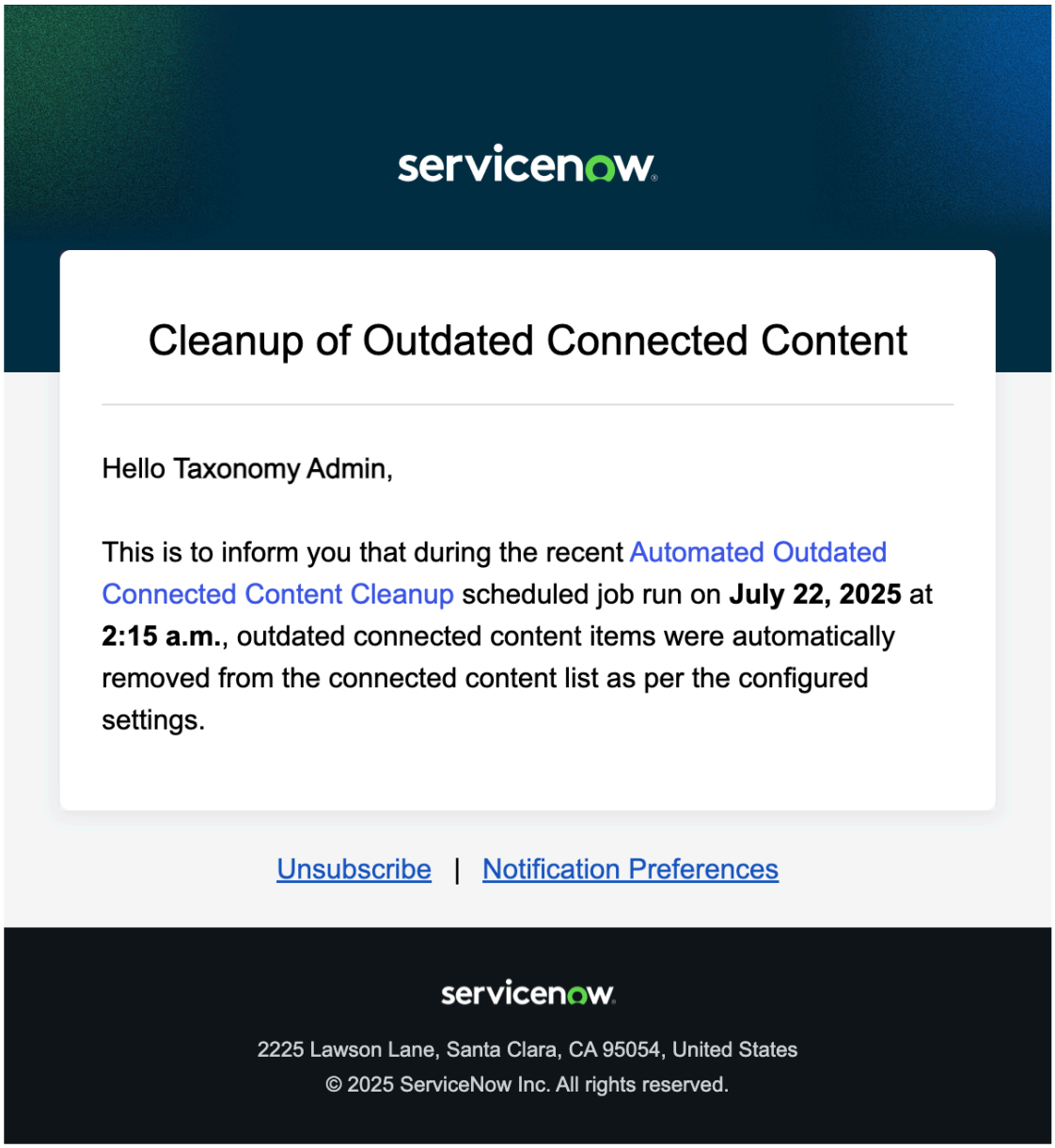
Email notification about cleanup of outdated content



When a category has outdated data, that data isn't associated with the topic.

Note: When you delete, only the association with the topic and taxonomies is removed. The actual catalog item or the knowledge article is not deleted.

Dynamic topic pages

Dynamic topic pages are topic pages that are dynamically configured using content tagged to a unified taxonomy across all departments.

These topic pages are separate portal pages that open when a user clicks a topic either from the mega menu navigation or from popular topics. Dynamic topic pages are not part of the home page. You can navigate to these pages from the mega menu or popular topic widgets. These pages are designed to provide a consistent experience across topics and channels in both web and Now Mobile app.

Topic pages are available on the Browser Extension for Employee Center. For more information, see Browser Extension for Employee Center.

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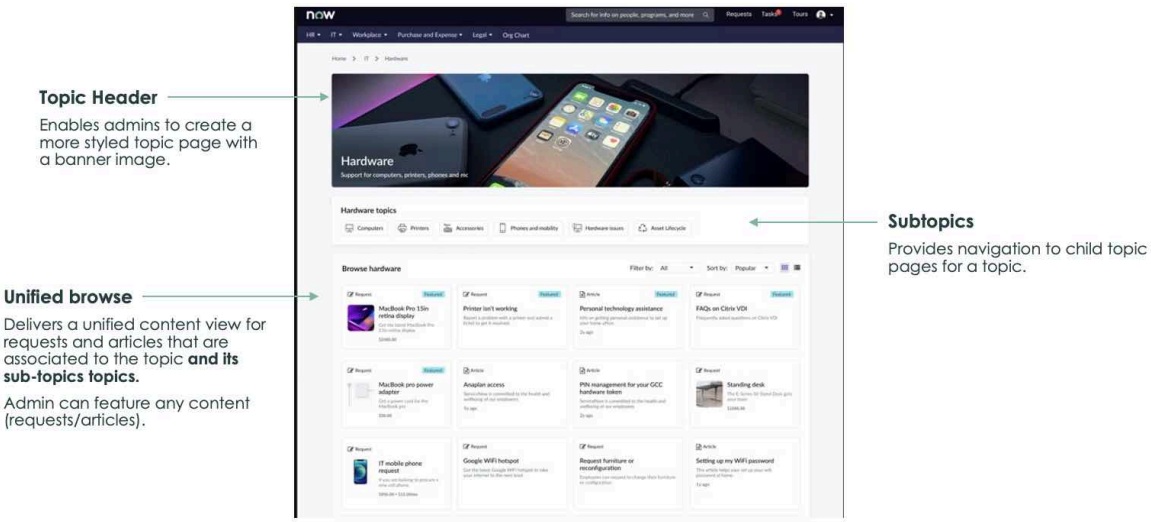
The dynamic topic pages are categorized into:

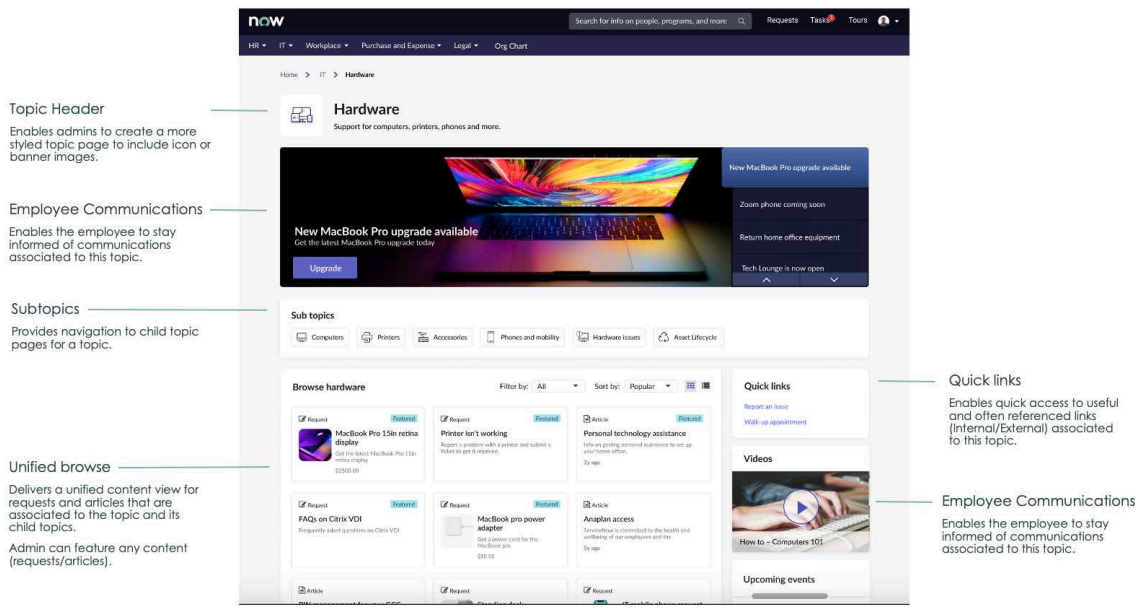
Topic Pages without Employee Communication content

Dynamically generated topic pages that bring together different types of content, such as request, articles, and quick links to provide a new and improved browse experience. These pages are available to all customers by default.



Topic Pages with Employee Communication content

Dynamically generated topic pages that bring together different types of content, such as request, article, quick links, and employee communication to provide a new and richer browse experience. The employee communication content is made available only after you install the Employee Center Pro application that is licensed separately.



Set up the content taxonomy and associate content to topics. If you have installed the Employee Center Pro application, you can use Content Delivery to target employee communication to topics. For more information on content taxonomy, see Unified Taxonomy for Employee Center.

For more information on creating content for your dynamic topic page, see Microsites. **Rich Content Editor** allows you to create and schedule rich, long form content using a drag-and-drop

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method and designed for non-technical users that create content. You can also create content from the Portal content and use the base system from Create a content category.

Configure additional permission levels for topic management

Experience decentralized management of topics by configuring two new permission levels, topic manager and topic contributor.

Before you begin

Role required: taxonomy_admin

About this task

Use distributed topic management by establishing two new user criteria, **Topic manager** and **Topic contributor**. These roles are additional levels of control introduced along with the existing Taxonomy admin, Taxonomy manager, and Taxonomy contributors.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Select the desired topic within a taxonomy and define the user criteria, namely **Topic manager**, and **Topic contributor**.

Result

Admins can configure additional permission levels to delegate topic management level tasks to these two user criteria. For more information on these two user criteria, see Topic managers and contributors for topic page management.

What to do next

Note:

- Any number of personae could be added to both the permission levels. Additional permissions provided at a topic level are additive, not overriding.
- Access flows from the root topic to its sub-tree in a top-down manner.

  Topic manager and **Topic contributor** can only make changes from the level they have been provided access to and further down the sub-tree.

Customize topic pages with various templates

Design topic pages with various custom-made templates to suit the tone of the topic for an enhanced user experience.

Before you begin

Role required: taxonomy_admin

About this task

Customize topic templates to improve your user experience. Each topic requires a different way of presentation for optimal customer engagement.

- Decide whether to change the appearance of the parent topic or the entire sub-tree.
- Make different topic sub-trees look different if the topic requires it.
- Easily switch to the default template for the parent topic, the sub-tree topics, or all topics.
- Preview the appearance before you publish.

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Note:

Ensure that you have San Diego installed along with Employee Center app version 24.0.5 to use the feature.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Taxonomies**.
   You can choose any taxonomy and the topics within the taxonomy to assign a custom template.
2. Select your preferred template from the list of templates to customize the chosen topic page.
3. **Optional:** Click **Preview template** to view the topic page in the new template before applying.
4. **Optional:** Click **Apply template to child topics** to apply the template for all child topics.

   Note:

   - All scheduled content, such as a campaign or content targeted for the respective topic must be rescheduled after a new template is applied to a topic page.
   - When you clone, move, or create a topic, the default template is automatically used. You must assign the desired custom template to the topic.

5. **Optional:** Click **Reset to default templates** to remove the customization and reset to the default template.
6. Click **Save** to publish.

Result

Customization of topic pages enables users to have better representation and autonomy in presenting different content.

Simplified topic page template cascade rule

Design topic pages with different templates using simplified cascading rules that provide a better designing experience for curators.

A few modifications have been made to the topic page cascading rules to streamline the process of customizing topic pages.

- When a parent topic cascades its template to its child topics by selecting **Apply template to child topics**, it overrides any changes made to a child topic, on the topic level, and it adapts to the cascaded rules from the parent.
- If you move a child topic from one parent topic to another, the child topic reflects the template cascaded by the new parent topic.

  Note: If you try to move a child topic from one sub-tree to another, you receive a warning stating that you will lose the current changes present in the topic page.

  The feature upgrade clones the applied template when you clone a topic.

Create topic page template

Create customized topic page templates to present different types of topics in distinguished manner to enhance customer engagement.

Before you begin

Role required: sp_admin

Application scope: Employee Center

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About this task

Assign various topic templates based on the content after you create or clone a new topic page. For more information, see Create and edit a page using the Service Portal Designer.

For design recommendations for the topic page templates, see Curated Experiences –#Topic Page Templates UX Guidance [KB1002813].

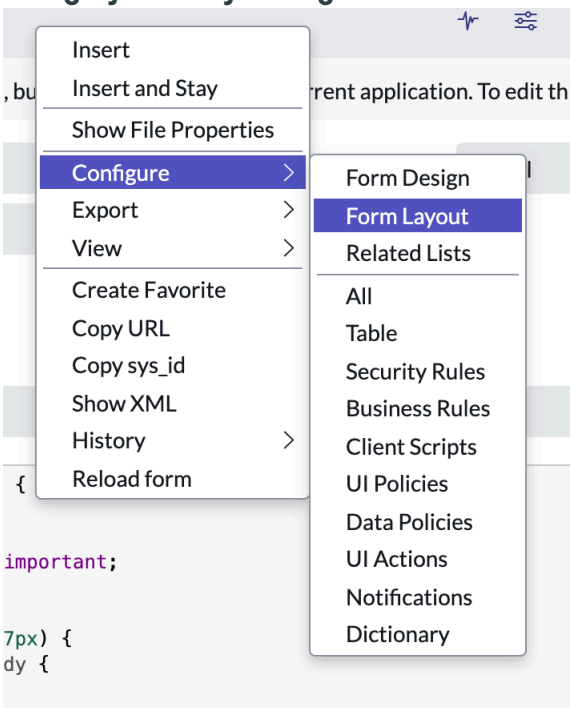
Note: It is advised to clone a topic page and make the required modifications instead of creating one.

This would ensure consistency among the topic pages.

Procedure

1. Navigate to **Service Portal** > **Pages**.
2. Select the topic page template you have created.
3. To make **Category** available on the page, right-click and navigate to **Configure** > **Form Layout** to make **Category** visible, which is by default inaccessible.

Category visibility setting



4. Add **Category** to the **Selected** list and **Save**.

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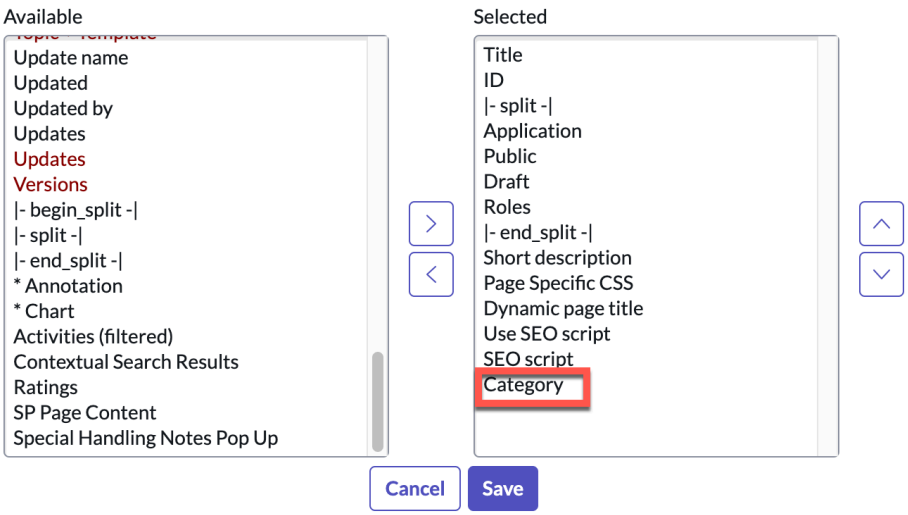
Category field in selected list



Note: It is essential to set the **Category** to **Taxonomy**. Only the templates set to **Category**, **Taxonomy** are visible in the topic form template list.

Translated Knowledge Base article attachment behaviour

Use the upgraded translated Knowledge Base article attachment feature to find a Knowledge Base article in your own language on topic pages. As an admin, easily link all translated articles. As an employee, quickly find different translated versions, enhancing the navigation experience in different topic pages.

The Connected content section in the topic pages has been upgraded to accommodate easier bulk linking and removal of translated Knowledge Base articles for admin users.

With this upgrade, adding any translated version of a particular Knowledge Base article connects all its translated versions to the same topic. Similar logic applies when one of the translated articles is disassociated from the topic. In this case, all the translations for that article are automatically removed.

Any Knowledge Base article translation created after the initial linking to a topic gets automatically connected to the respective topic.

For both association and disassociation of the translated versions, notifications appear on the screen warning you of the automatic changes that were made.

Notification for automatic changes

Scenario	Notification
All translations automatically being associated to a topic, when one of the translated versions is linked.	All translated versions will be automatically added.
All translations automatically being disassociated from a topic, when one of the translated versions is deleted.	All translated versions of the deleted Knowledge Base article was automatically removed.

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Translated Knowledge Base article view on Employee Center

As an employee user, view articles in your preferred language by using the respective Employee Center settings. If the preferred language translation is not available for any article, it is visible in the default language. The default language is configured by the *glide.sys.language* system property.

The feature applies to the Recommended for you section in the Employee Center portal and Now Mobile app.

Add all translated Knowledge Base articles after an upgrade

Complete bulk tagging after you upgrade Employee Center by running the utility script. You can determine how many disassociated Knowledge Base article translations and unlinked topics that you have, using this script.

Before you begin

Role required: esc_admin

About this task

Upgrade to the Employee Center app version 25.0.3 to use the script to evaluate if all your Knowledge Base article translations are correctly connected to their respective topics.

You can run the utility script to bulk tag all translated versions of Knowledge Base articles to all the respective topic pages at once.

Procedure

1. Append the UI link `sn_ex_sp_get_unlinked_translated_kb.do` to the end of your instance URL.
   Select one of the following buttons populated by the script:
   - **Topic with unlinked knowledge article count**, which provides the number of topics with one or more unlinked Knowledge Base article translations.
   - **Unlinked translated knowledge articles count**, which populates the exact number of unlinked translated article versions.
2. To complete the association, select **Link all translated knowledge articles**.
3. **Optional:** To update the count before linking, select **Refresh list**.

Search on the topic pages

The new search functionality on the topic pages provides different filters, sorting options, to make searching data easier on Employee Center.

The search functionality on the topic pages provides results for the Service Catalog items, the Knowledge Base, and the learning content.

- It is available with the AI search functionality.
- It provides spell-checks, synonym detections, suggestions based on the keywords you're typing.
- The filter option remains the same. The sort option changes to allow easier content discovery with the search.
- The reset option clears out all the filter and sort options previously selected.

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- The default number of results for a search on the topic pages and on the Unified Browse widget is 12 at a time.

  For more information on changing the default number of results, see Change the number of returned search results.

Note: You must have the Employee Center 28.0.4 installed along with Utah for the search on the topic pages feature to function.

Change the number of returned search results

Specify the maximum number of search results the system should return.

Before you begin
Role required: esc_admin

About this task

- Search content on the topic pages.
- Support for Knowledge Base article, Learning content, and Service Catalog item content types are available with the feature.
- Change the default number of results displayed according to your organizational requirements.

Procedure

1. Navigate to **All** > **AI Search** > **Search Experience** > **Search Applications**.
2. From the applications list, click **ESC Portal Default Search Application**.
3. Change the **Search Results Limit** to your desired number from the base system value 12.

Connect content to topic pages with the topic list selector

Get a uniform Service Catalog item-to-topic association experience with the topic list selector on Employee Center.

Before you begin
Role required: catalog_builder_editor, taxonomy_admin

User criteria required: Taxonomy Manager, Taxonomy Contributor, Topic Manager, Topic Contributor.

About this task
You can associate any Service Catalog item to multiple topic pages using the topic selector component. The feature enables easy content-to-topic association for the Catalog Builder.

Note: The topic list selector feature is available for customers starting with Australia release.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Builder** and click **Create a new catalog item**.
2. Click **Continue** on the getting started window.
3. Choose a Service Catalog item template and click **use this item template**.
4. Go to **Location** on the create record producer window.
5. Click **Edit selected topics** on the **Topics** card to add or remove topic pages associated to the Service Catalog item.

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- Select the **Taxonomy** and **Available topics** from the list to associate with your selected Service Catalog item.
- Drill down until eight levels of sub-tree topics to associate with your Service Catalog item.

Result

- Choose multiple topics altogether in any active taxonomy to associate with a Service Catalog item.
- Add up to eight levels of sub-tree topics to the Service Catalog item.

Mega menu configuration

The mega menu helps you navigate to a topic and its child topics. The taxonomy you associate with the employee center portal record determines the mega menu and its menu items. By default, the topics and child topics you create in the taxonomy are displayed as mega menu items.

Before you begin

Role required: admin

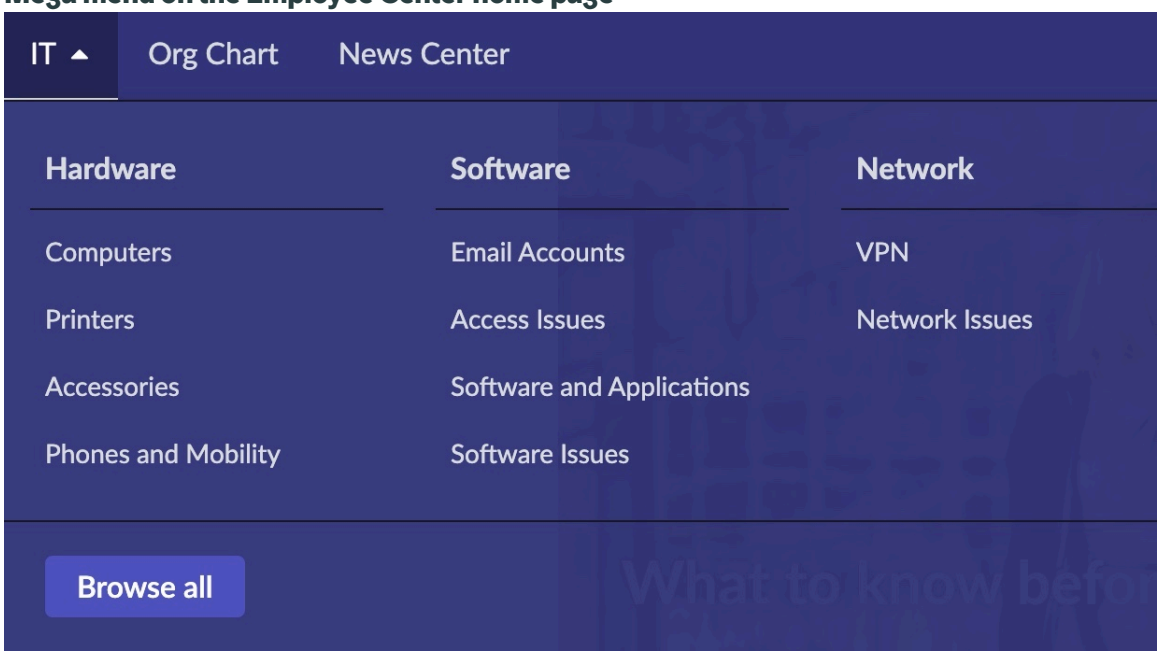
About this task

Taxonomy topics become available to you after you install and activate the Employee Experience Taxonomy plugin (sn_ect). The base system taxonomy—Employee—is installed when you install the Employee Experience Taxonomy plugin.
To modify the default taxonomy, clone the taxonomy first, and then create new parent topics and their child topics. For more information, see Clone taxonomy for employee content. The root topics are shown in the mega menu. The child topics up to two levels are listed under the mega menu and displayed when you click the mega menu. Click **Browse** <topic_name><topic_name> to open the parent topic. For example, click the **Browse all** to open the IT parent topic. The following figure shows the IT menu items.

Note: Only the active topics that have connected content are shown in the mega menu.

For more information on the EC information architecture and configuring the portal navigation, see Advanced Portal Navigation.

Mega menu on the Employee Center home page



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Note: You can customize the primary and background color from CSS variables.

In Employee Center, the default Employee taxonomy includes IT, HR, Workplace, Legal, and Procurement mega menus. The mega menu displays three levels of topics (root topic, child topic 1, and child topic 2). For example, **IT > Hardware > Printers**.

- Simple list: If a root topic has only one level of child topic 1, that is, if the child topic 1 doesn't have child topic 2, the child topic 1 is displayed as a simple list under the root topic menu.
- Single column: If child topic 2 (2nd level topics) has upto 10 under child topic 1, UI is displayed as a single column.
- Two columns: If child topic 2 exceeds 10 under child topic 1, UI is displayed as two columns.
- Two columns with topic page: If child topic 2 has more than 20 under child topic 1, UI displays only 20 child topic 2s as two columns. For remaining topics, navigate to Topic Page of child topic 1 and verify in Sub-Topics widget.

Note: As changes are saved in the session cache, ensure you relogin to reflect any topic changes on the mega menu.

Procedure

1. Do one of the following:
   - Clone the taxonomy for employee content. For more information, see Clone taxonomy for employee content.
   - Manually create a taxonomy. For more information, see Create taxonomy.
2. Create a root topic and associate it with the cloned or new taxonomy.
   For more information, see Create and associate topics.
3. Create a child topic and associate it with the parent topic.
   For more information, see Create a child topic. Repeat this step to create as many child topics as needed.
4. Associate connected content to the topics.
   For more information, see Associate connected content to a topic.

   Note: You can view topics on the mega menu only if you have access to at least one connected content.

5. Enable user criteria for topics to set up topic-level visibility settings.
6. Configure Mega menu async load system properties to improve the load and performance.

What to do next

You can also add non-taxonomy menu items to the primary navigation bar. For more information, see Add menu items to primary navigation.

Note: When the mega menu is empty, check if the demo data for the Employee Experience taxonomy app is installed. Select the Load demo data check-box to include the demo data along with your install or repair.

Add menu items to primary navigation

Add non-taxonomy menu items to the primary navigation bar by configuring the Employee Center Menu record. The non-taxonomy menu items are displayed as a simple list.

Before you begin

Role required: admin

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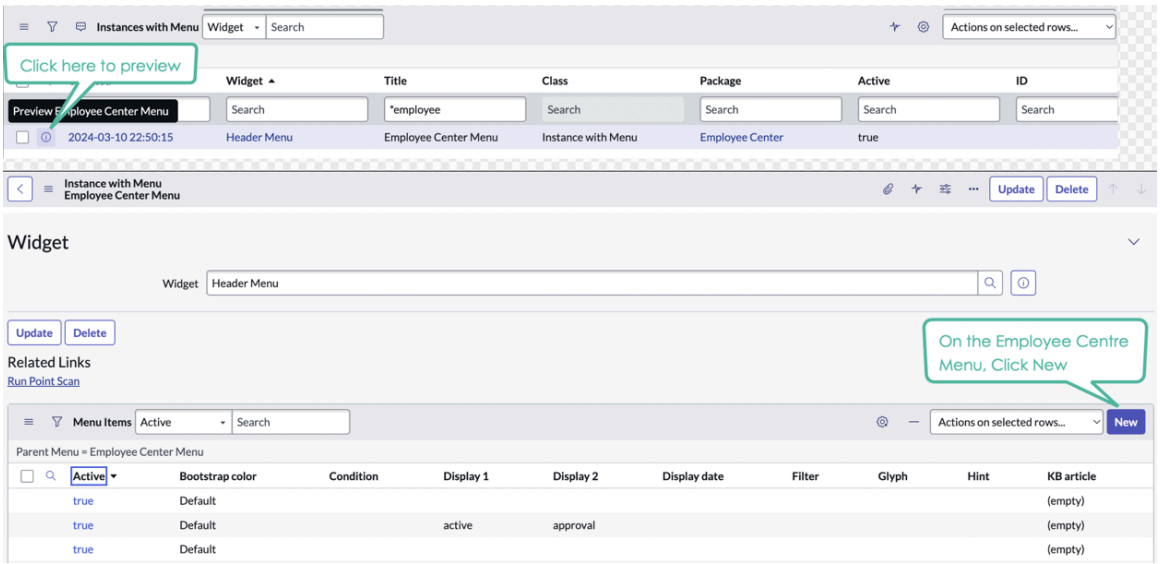
About this task

The topics and child topics you create in the taxonomy are displayed as mega menu items in the Employee Center home page. The default non-taxonomy menu items that are displayed depend on the plugins that you installed. For example, the Employee Center displays the Org Chart menu item when you install the Content Delivery (com.sn_content_delivery) plugin. The Employee Center Pro displays the Employee Forums menu item when you install the Communities (com.sn_communities) plugin.

Procedure

1. Navigate to **All** > **Service Portal** > **Menus**.
2. Change the **Application scope** to **Employee Center**.
   You must set the application scope to add a menu item.
3. Next to the **Title** field, click **Preview this record** and open the record.

Menu item



4. In the **Menu Items** related list, click **New** or open an existing record.
5. On the form, fill in the fields.
   For a description of the field values, see Menu Item form.
6. Click **Submit**.
   The non-taxonomy menu items are displayed next to the taxonomy menu items in the primary navigation bar.

View quick links on the mega menu

You can view quick links associated with root topics on the mega menu.

Before you begin

Role required: admin

About this task

You can associate quick links with a root topic so that it appears on the mega menu under Quick Links. Only the quick links that you associated with root topics are shown on the mega menu. For more information, see Associate a quick link to a topic.

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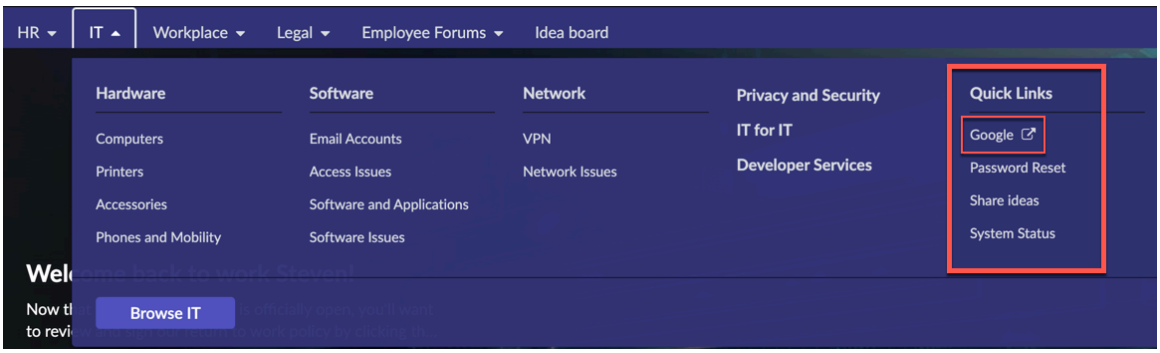
Procedure

1. On the Employee Center home page, click a root topic.
   If the root topic has quick links associated with it, and if you have access to the quick links, then those quick links are displayed for that root topic on the mega menu.



Note: The external link icon ( ) next to a quick link indicates that it is an external link.

2. Click any quick link that you want to view.
   Depending on the content type associated with the quick link, the relevant content is displayed.

Note: External link and megamenu are supported for accessibility. Fields include a tooltip icon and Screen readers read the tooltip when the icon is in focus.

Related topics

Create a quick link

Assign topics to a quick link

Restrict access to a quick link

Configure Mega menu async load system properties

The mega menu async improves the homepage interactivity by loading the Mega Menu in the background, enabling you to engage with visible content faster.

Before you begin

Role required: admin

About this task

You can decouple the mega menu load from the homepage using the asynchronous process.

- Use the mega menu async load system properties to display placeholder elements resembling the final content layout while the actual data is being fetched.
- Show a blank screen or a spinner, skeleton loaders create an improved perception of performance and user experience.
- Continue work on homepage and other widget items irrespective of the mega menu load time.
- Enable cache, reduce the load-time, and improve responsiveness.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The list of properties in the System Properties [sys_properties] table appears.
2. Search for the following properties and click open.

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Megamenu async load system properties

Name	Value	Type	Application	Description
*megamenu	Search	Search	Search	Search
sn_ex_sp.megamenu_async_load	true	true | false	Employee Center	Toggle to enable or disable the asynchro...
sn_ex_sp.megamenu_async_load_skeleton_view	true	true | false	Employee Center	Toggle to enable or disable the Mega Men...
sn_ex_sp.megamenu_async_timeout	15000	integer	Employee Center	Specifies the timeout duration (in milli...

a. Toggle **sn_ex_sp.megamenu _async_load** to enable or disable the asynchronous mega menu loading feature.
   - True: Show skeleton loader
   - False: (Default)

b. Toggle **sn_ex_sp.megamenu_async_load_skeleton_view** to enable or disable the Mega Menu skeleton loader.
   - True: Show the skeleton loader until the async flow gets the data.
   - False: Show that previous session data until the async flow gets the data and then update the UI. For more information, see User portal data map.

c. Specify the **sn_ex_sp.megamenu_async_timeout** timeout duration (in milliseconds) for loading the asynchronous mega menu.
   The default value is 15000. After 15 seconds, the UI aborts the data load and displays an error message

```
There was a problem with loading the menu. Please try again
 later.
```

.

3. Click **Save** or **Update**.

Result
The system properties improve the async load and overall performance.

Related topics
Portal performance optimization

User portal data map

User portal data map

User Portal Data Map table table is accessible only to the maint user and is auto-deleted in 30 days with an auto-flush job.

Before you begin
Role required: admin or maint user.

About this task
User Portal Data Map table stores the session data when the user logs in. When you mark

- **sn_ex_sp.megamenu _async_load**=true and **sn_ex_sp.megamenu_async_load_skeleton_view**=true, the user portal data map (sn_ex_sp_user_portal_data_map) fetches, stores, refreshes, and displays the latest mega menu session data without page refresh. Skeleton loaders appear, a job fetching the latest

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data runs in the background, then this data is displayed for subsequent sessions until the data is fetched afresh.

- **sn_ex_sp.megamenu _async_load**=true and **sn_ex_sp.megamenu_async_load_skeleton_view**=false, the user portal data map (sn_ex_sp_user_portal_data_map) saves the megamenu session data from the most recent session. Table data updates with each login. This data appears for subsequent sessions without skeleton loaders.

Note: Ensure you re-login for the changes to display.

Procedure

1. Navigate to **All** > **System Definition** > **Tables** > **User Portal Data Map**.
2. On the sn_ex_sp_user_portal_data_map, go to the **Application Access** tab.
3. See the following options with the **All application scopes**.
   - Can read
   - Can create
   - Can update

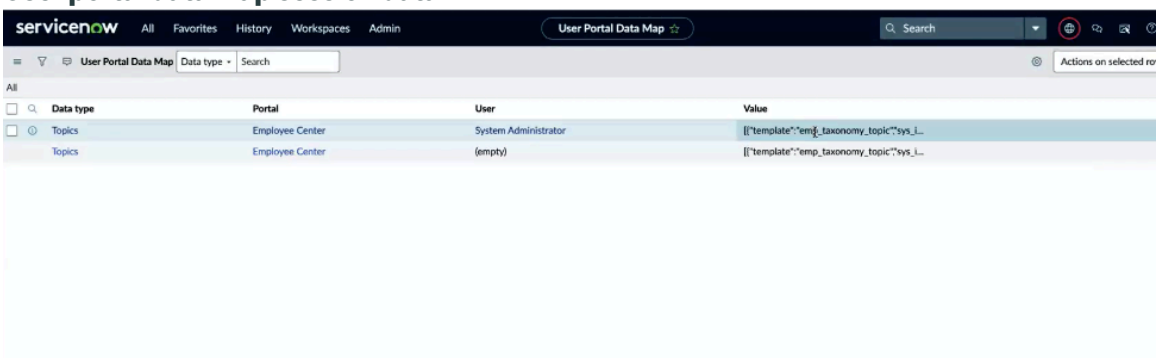
   Do not select **Can delete**

Note: Data in the **User Portal Data Map table** table is accessible only to the maint user and is auto-deleted in 30 days with an auto-flush job.

What to do next

In the navigation filter, enter `sn_ex_sp_user_portal_data_map.list` to see the data.

User portal data map session data



Related topics

Configure Mega menu async load system properties

Get support

Get support helps you with a centralized and easy-to-navigate section for quick help from the employee center.

Before you begin

Role required: SP admin or ESC admin

About this task

Admins provide a central place for employees to get help quickly without having to switch context. You can include useful resources available for your employees.

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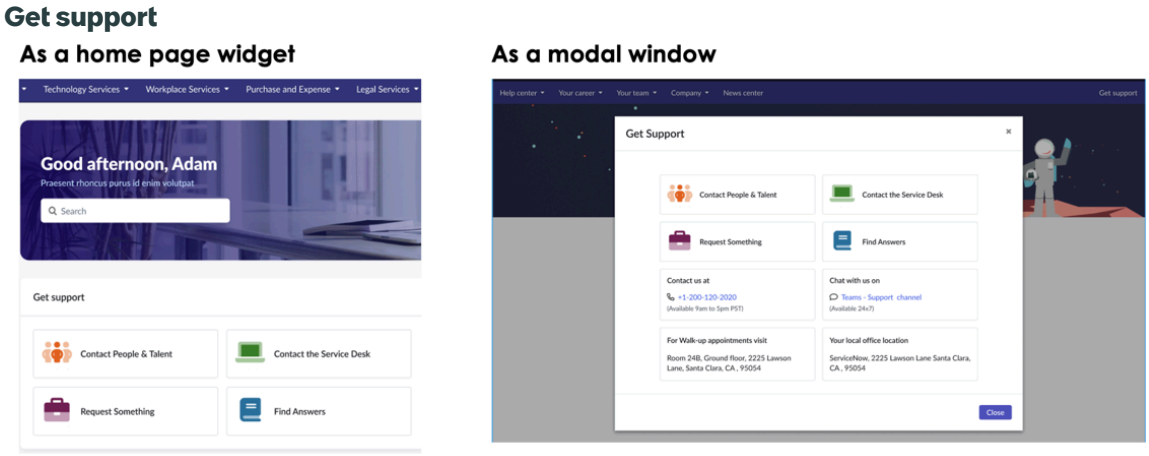
- Enable the widget for an enhanced get support experience.
- Populate the modal with quick link, static content, or a custom widget.

You can render **Get Support** as a widget on the home page or as a modal window. For more information, see Configure advanced portal navigation



Procedure

1. Navigate to **All** > **Employee Center** > **Get support**.
2. Click **New** or open an existing record.
3. Select **Table** from the available options.
   - Quick Link
   - Static Content
4. Select **Content** from the available options.
   - For **Quick Link**, select the **Table name** (sn_ex_sp_quick_link) and **Document**. For more information on quick links, see Quick links.
   - For **Static Content**, select the **Table name** (sn_ex_sp_static_content) and **Document**. For more information on static content, see Configure static content.

     Note: The admin can configure any number of items. The out-of-the-box **Get support** has a maximum of eight items.

5. Specify **Order**.
6. Select **Portal** from the available options.
   For example, to associate a quick link to Employee Center Pro Kiosk, select Employee Center Pro Kiosk.
7. Click **Save**.

Result

Get support is configured by default as part of the navigation.

What to do next

You can proceed to select the Get support section to appear as a modal window by selecting the widget and providing the widget parameters as explained in Configure advanced portal navigation. You can also configure the alignment as shown in the following image.

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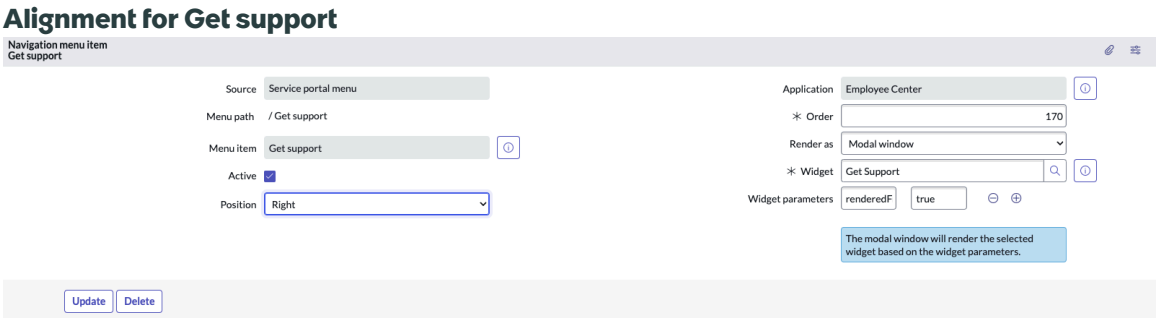

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Configure static content

Static content helps create a central place for adding all the useful content for employees.

Before you begin

Role required: Admin

Procedure

1. Navigate to **All** > **Employee Center** > **Static Content**.
2. Click **New** or open an existing record.
3. On the form, fill in the fields.

Static content form

Field	Description
Title	Name of the record.
Active	Check the box to activate.
Rich text	Descriptive information for the static content.
Available for	Option to make the static content available for only to select users, groups, roles, and more.
Not available for	Option to make the static content unavailable for.

4. Click **Save**.

What to do next

You can add the useful static content in the Get support section.

Advanced Portal Navigation

Advanced Portal Navigation (APN) helps you design and configure an intuitive navigation for better information architecture and topic discovery. You can manage the topics and service portal menu items based on employee needs. Use the enhanced navigation experience that helps you with better content discovery.

Using the advanced portal navigation, you can design the primary navigation menu and configure the navigation setup based on employee needs and content priorities. You can manage topics, SP menu items, and a mix of both.

Note: When you enable **Advanced portal navigation**, you can manage the root-level topics and menu items from this table itself and not from the taxonomy or the SP menu items.

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Here's a quick summary of what you can do:

- Configure and control the design and display of the primary navigation bar.
- Sync across the hierarchy to fetch the menu items, root topics, and child topics.
- Simplify taxonomy updates by enabling single-click sync across all APN hierarchy levels, replacing manual level-by-level sync.
- Use the base system information architecture or customize based on your business needs.

Note: Only the active portal record and its menu items are shown in the navigation.

Use the guided tour that provides a feature explainer to help understand what APN is and how you can configure it.

Top navigation and side navigation

Create an APN record and select one of the following navigation options.

- Top navigation: Supports up to four levels of hierarchy and surfaces a broad set of topics and quick links directly at the top of the portal, helping employees to navigate to deeper levels. This navigation is the existing mega-menu in the header that supports deeper and more complex hierarchies. For more information, see Configure advanced portal navigation.
- Simplified or side navigation: Use the new layout for simple visual access, iconography, and quick access to key destinations, helping employees browse topics with less effort and reduced visual complexity. Side navigation in Employee Center is a new left-hand, icon-driven, two-level menu meant to simplify browsing. For more information, see Configure simplified left navigation.

Both options help define and navigate to root and subtopics, assign icons, and enable faster access.

Advanced portal navigation benefits

You can offer a simplified navigation to the content.

- Use the base system structure for better discovery and consumption.
- Customize the design and structure based on your preferences using the taxonomy or SP portal menu.
- Navigate to the right content with minimal clicks.
- View the topics and menu items on the primary navigation bar.
- Consume the display preferences for the root-level topics or menu items that are custom-served to suit your needs.

Note: External link and mega menu are supported for accessibility. Fields include a tooltip icon and screen readers read the tooltip.

Mega menu configuration

Admins can manage the information architecture and navigation. You can configure the mega menu to show a mixed hierarchy of SP menu items, APN menu items, and topics with flexible layout options. Create a mixed hierarchy and enable a consumer-grade browse experience. For more information, see Mega menu configuration.

- Organize the content into standard layout and expanded layouts.
- Configure the root items position to the left or the right.

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- Invoke an interactive modal window from the mega menu.
- Sync the hierarchy to fetch the menu items, root topics, and child topics.

Note: By default, the APN record for EC and EC Pro is inactive for existing customers. When you upgrade to the latest release, ensure you activate the APN record.

EC Information architecture

You can now use the out-of-the-box enhanced information architecture for improving content discovery and visibility.

Using the advanced portal navigation, you can design the primary navigation menu and configure the navigation setup based on employee needs and content priorities. Organize your content into menus or modal windows.

Out-of-the-box mega menu architecture options

This image is for illustration purpose only for the out-of-the-box (OOTB) mega menu.

- OOTB EC Pro mega menu layout is expanded.
- OOTB EC mega menu layout is standard.

Note: You can use a layout of your choice and configure more levels in your taxonomy based on business needs.

Useful tips and information

Use some of the following guidance and tips.

- Side navigation is ideal for organizations prioritizing simplicity, focus, and a modern, app-like experience; top navigation remains the better choice when depth, complexity, or broader topic visibility is needed.
- For **Standard view**, you can have a maximum of three levels.
- For **Expanded view**, you can have a maximum of four levels (one menu item in the hierarchy and topics up to three levels). In this example, `Help center > Technology Resources > Hardware > Computers`, you have
  - One navigation menu item `Help center` and
  - Three levels of topics `Technology Resources > Hardware > Computers`
- Add topics up to three levels from the root-level. For example, when you add topics under Human Resources, you can only traverse from `Human Resources > Subtopic 1 > Subtopics 2`.
- Topics from one hierarchy cannot be mixed with topics of another hierarchy. For example,
  - For `Human Resources > Pay and Time > Compensation`, you cannot add Hardware as a child of HR.
  - For `Technology Resources > Hardware > Computers`, you cannot add Pay and Time as a child of Technology Resources or Hardware or Computers.
  - Pay and Time can be a sibling of Technology Resources or Hardware or Computers.
- Level 3 in the expanded view and level 2 in the standard view are dynamically adjusted as per available space.
- For the root item without any child items or any active associated quick link, the Browse button is not displayed.

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- The browse button is displayed in the hamburger view for topics and the browse button is not displayed in the hamburger view for SP menu items.

  Note: You can configure the browse button however the button text is not displayed in the hamburger view. The Browse button display text in the hamburger view is **Browse all**.

- A quick links related list is available on the root-level for the standard view.
- A quick links related list is not available on the root-level for the expanded view.
- Quick links are fetched when you create portal records.

  Note: When you use a sync hierarchy, the quick links are not fetched.

- Only three levels of topics and two levels of SP menu items associated with portal taxonomy are fetched.
- Visibility of a topic in the Mega menu is based on connected content. To avoid display issues, ensure it is active at the source (topic or SP menu item) level and at navigation item level in Advanced portal navigation.
- When you disable the 'Browse' button in the mega menu from <APN config page/record name>, the browse button is disabled only in the desktop version. Mobile version still displays the Browse button as responsive version of the navigation does not currently support the buttons.

Related topics

Configure advanced portal navigation

Configure simplified left navigation

Configure advanced portal navigation

Advanced Portal Navigation (APN) helps you design and configure an intuitive navigation for better information architecture and topic discovery.

Before you begin

Before you start, ensure you understand the useful information available in EC Information architecture.

Role required: Admin and SP Admin

About this task

Using the advanced portal navigation, you can enable single-click sync across all APN hierarchy levels, replacing level-by-level sync. You can design the primary navigation menu and configure the navigation setup as per employee needs and content priorities. Here is an overview of the navigation workflow:

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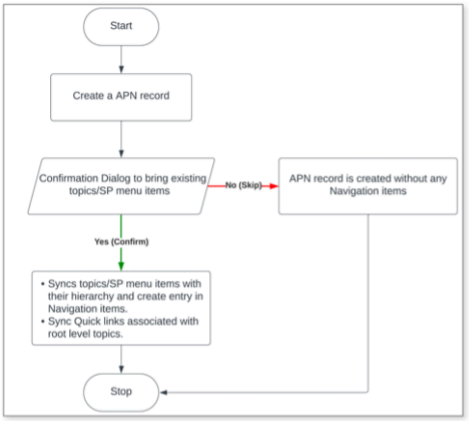
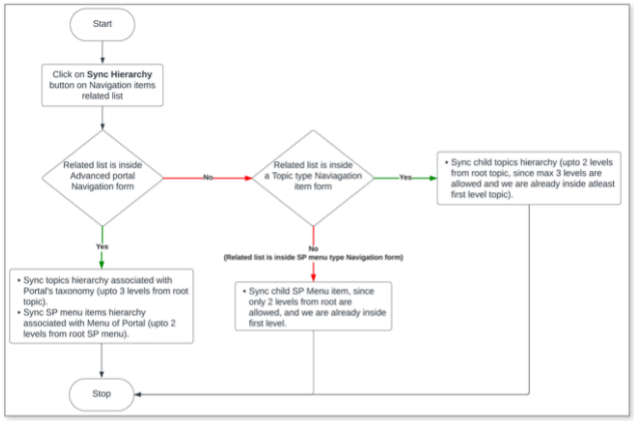
APN architecture





Procedure

1. Navigate to **All** > **Employee Center** > **Advanced Portal Navigation**.
2. Click **Take a tour** to understand the APN process.
   Understand more about APN process and configuration from the explainer tour.
3. Click **New** to create a new record or view the list of the available APN record.
4. Select **Active** to replace the current Employee Center with the new navigation menu.

   Note: Only one Advanced portal navigation record [sn_ex_sp_portal_extensible_navigation] can be active per portal. When you have one active record, you must first deactivate the other one first.

5. Click **Submit** or **Save**.
   A pop-up appears with the following message.

```
To help you get started, we can bring over your existing
 navigation menu items and you can edit from there.
You can also skip this and start from scratch. Do you want to
 bring over your current menu now?
```

6. On the **Start with current navigation menu**, select one of the following options.
   - **Skip**: When you click skip, the existing associated navigation menu items and topics are not fetched and you can start building your hierarchy afresh.
   - **Yes**: When you click yes, the existing associated navigation menu items, topics, and associated quick links are fetched instantly and you can refine the hierarchy.

   The **Menu items** related list appears.

   Note: An empty list appears when you click the skip option.

7. Use one of the options to create new or fetch the existing hierarchy.

   a. Click **New** to create or add from the available list.

   b. Click **Sync hierarchy** to fetch existing items.
   Topics and menu items which are in the **Active** state are synced. Confirm sync popup appears with info on email notification.

   Note: Quick links are not fetched. Add quick links manually.

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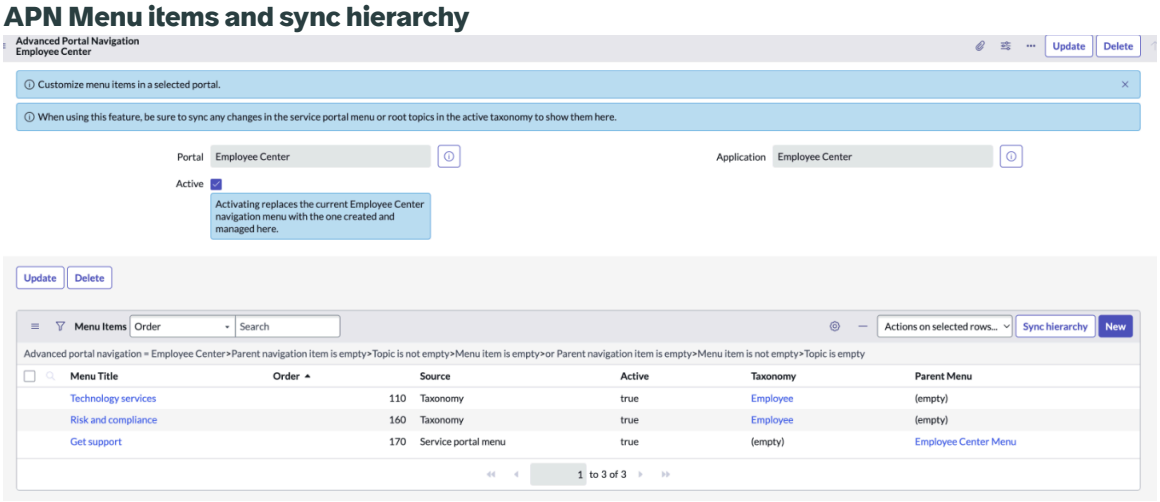

8. On the **Navigation menu item** related list, fill in the form.

Note: The following fields are available in the base system starting with Employee Center version 31.

Navigation menu item form

Field	Description
Source	Source of the item is usually a taxonomy topic or a service portal menu item.
Application	Application in scope for this activity.
Topic	Topic name fetched from taxonomy. Depending on the level, you can select the children topics from the available list. **Note:** Ensure that the topic or menu item is already associated in the parent navigation. Only active topics and menu items are available for creating navigation.
Menu path	Path for the menu item. When you open an available APN menu item, the menu path appears. Path indicates the parent-child association, for example **/Help center/Technology services**.
Menu item	Menu item fetched from the service portal menu.
Order	Enter a number to indicate where this item appears on the menu relative to other menu items.
Active	Status of the record. Only Active records are synced.
Render as	Indicates the rendering type that you want. ○ **Menu**: Select this option to display as a menu. ○ **Modal window**: Select this option to display as a modal window. Use widget and widget parameters to customize experience.
Submenu display type	Indicates the rendering type that you want to display in the menu. This field appears only when **Menu** is selected at the root-level hierarchy. ○ **Expanded**: Select this option to display in the expanded view. ○ **Standard**: Select this option to display in the standard view. Out-of-the-box is Standard.

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Field	Description
	For more information, see EC Information architecture.
Widget	Select this option to use the available widgets to customize experience. This field appears only when **Modal window** is selected.
Widget parameters	The modal window renders the widget content based on the name-value pair of widget parameters. This field appears only when **Modal window** is selected.
Browse button	Select this option to show the browse menu option. For the root-level hierarchy, select the Browse button and specify the display text. When you select this option with empty text, the default display is **Browse all**. **Note:** For standard view, the browse option is available on the root-level and for the expanded view root-level and first-level only.
Browse button display text	Select this option to show the browse option on the menu. ○ When you select taxonomy as source, the Browse button display text is automatically generated based on the topic. For example, when you select HR Systems as Topic, the display text shows **Browse HR systems**. ○ When you edit a menu item or sync, manually specify the Browse button display text, for example, `Browse <your text>`. ○ When you do not specify any display text, the button displays **Browse all**.

Note: Use this table to manage all items in the primary navigation. Hierarchy changes made in the taxonomy or SP menu do not reflect on the primary navigation.

9. Track the sync status from the following fields:
   - **Sync status** indicates the status of the sync such as *`Never synced`*, *`In progress`*, and *`Completed`*.

     Note: An email notification is sent with the sync results indicating the addition of new items, if any.

     When Sync is in progress, you can't perform actions such as Update or Delete from the APN or Menu items records.
   - **Last synced** indicates the time of the last sync.

   Note: To display the Sync status, ensure you deactivate the **Hide sync status** UI policy from **All** > **System UI** > **UI Policies**. For more information, see Using UI policies
10. Notify the sync status through email.
    On completion, you receive information on the sync status update with the count of changes.

    Note: If you face issues with the sync, contact your administrator.

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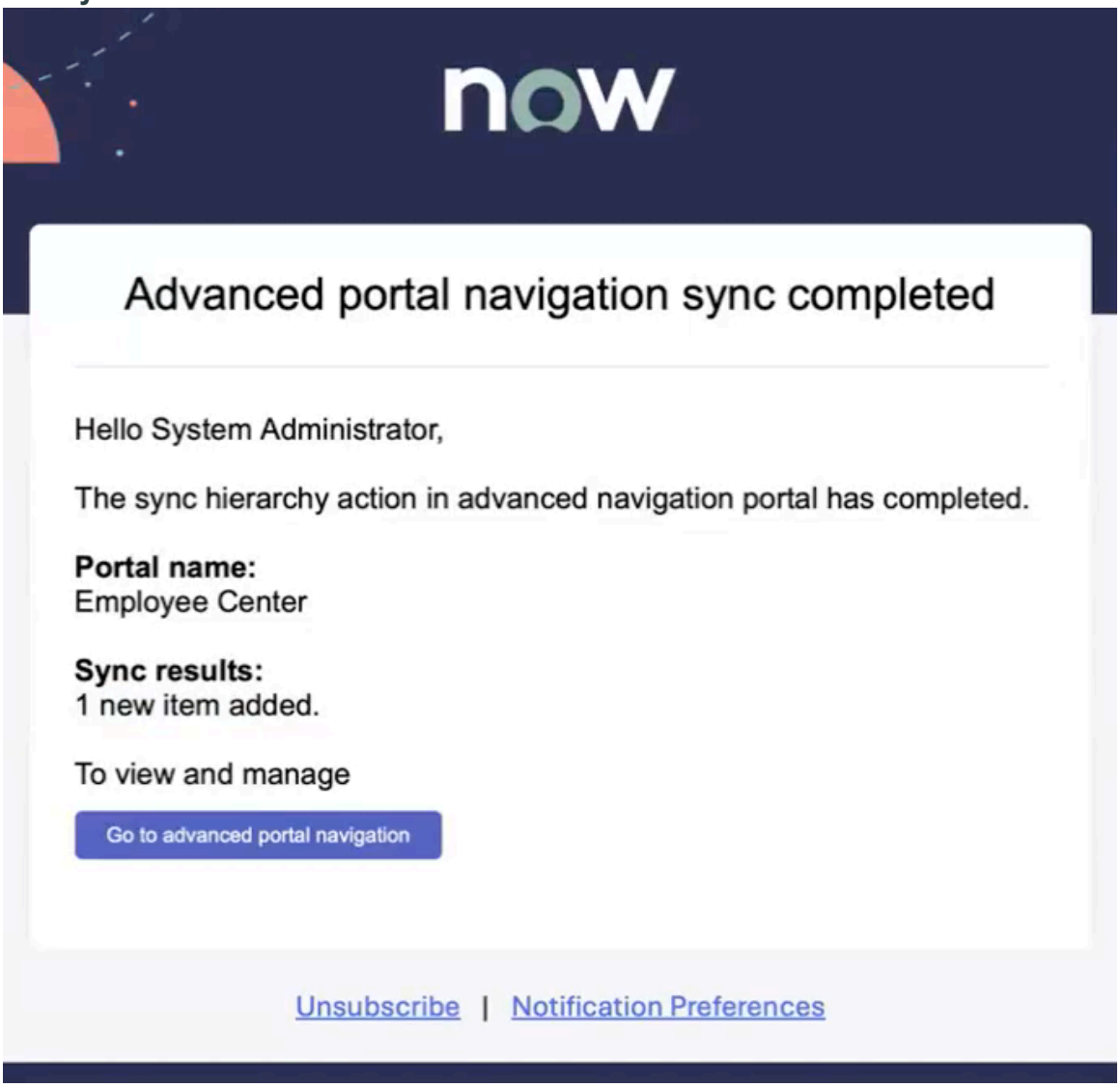
APN sync status email



11. Click **Update** for changes to reflect.

Result

Advanced portal navigation record is saved and your employees can view the new mega menu design.

What to do next

All active navigation items associated with the portal and taxonomy are fetched and displayed in the related list.

- While creating the record or for subsequent syncs, all the fetched navigation menu items are in the **Active** state by default.
- To include any future changes in the service portal menu or root topics in the active taxonomy, you can use **Sync hierarchy** to bring any new topics or menu items.
- Newly synced items are **active** by default with the existing order. When the order is not available for topic, the order is 999999.
- You can make edits, if necessary, after the sync is complete.
- All taxonomy updates across all APN hierarchy levels are in sync with a single-click.

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Note: For successful sync, ensure that the SP Menu Items are associated with the portal for which the Advanced Portal navigation record is configured.

For more information, see EC Information architecture.

Configure advanced portal navigation order

Advanced Portal Navigation (APN) helps you design and configure an intuitive navigation for better information architecture and discovery. You can reorder topics and non-topic menu items based on employee needs.

Before you begin

Role required: Admin

Procedure

1. Navigate to **All** > **Employee Center** > **Advanced Portal Navigation**.
2. Click **New** or view the list of the available portals.
3. On the Advanced Portal Navigation page, specify **Employee Center** and click **Save**.
   The following active navigation items associated with the portal and taxonomy are fetched and displayed as a related list.

Advanced Portal Navigation (APN) configuration

Field	Description
Topic	Topic name fetched from taxonomy.
Menu item	Menu items are fetched from the service portal menu.
Order	Enter a number to indicate where this item appears on the menu relative to other menu items.
Source	Source of the item is usually a taxonomy topic or a service portal menu item.
Taxonomy	Associated active taxonomy of the root topics.
Parent Menu	Parent from where menu items are fetched.

Note: Use this table to manage the display order of all items in the primary navigation. Order changes made in the taxonomy or SP menu do not reflect on the primary navigation.

4. Specify the order of navigation menu items based on your needs.

   Note: Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you can use any number from 101 through 199. You can use negative numbers such as -100.

5. Click **Update** for changes to reflect.
   Order and Active status settings persist from this table.
6. Set the Advanced portal navigation record status value to **Active** to manage the display order and navigation preferences.

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Result

Advanced portal navigation record is saved. You can save multiple records however only one **Advanced portal navigation** record can be **Active**. When you set the status to **Active**, you can control the display order of Employee Center navigation menu items from the table itself. This replaces the existing menu order.

What to do next

To include any future changes in the service portal menu or root topics in the active taxonomy, you can

1. Click **Sync menu changes**. The following confirmation message appears.

   ```
   Changes show in the navigation menu right away, placed at the
   end. You can make edits or change the order of items after the
   sync is complete. Do you want to sync now?
   ```

2. Click **Yes** to confirm the updates instantly.

When sync happens, the new items appear in the end. Update the order manually to change the display order.

Simplified Navigation

Simplified navigation helps you design and configure an intuitive navigation experience and enrich information architecture and topic discovery experience.

Using the simplified navigation, you can design the primary navigation menu and configure the navigation setup based on employee needs and content priorities.

- Provides a choice to configure left-side navigation
- Simplifies navigation with a configurable flat menu.
- Takes employees to destination with an easy hover or click.
- Adapts across devices by transforming to bottom navigation for a consistent experience.

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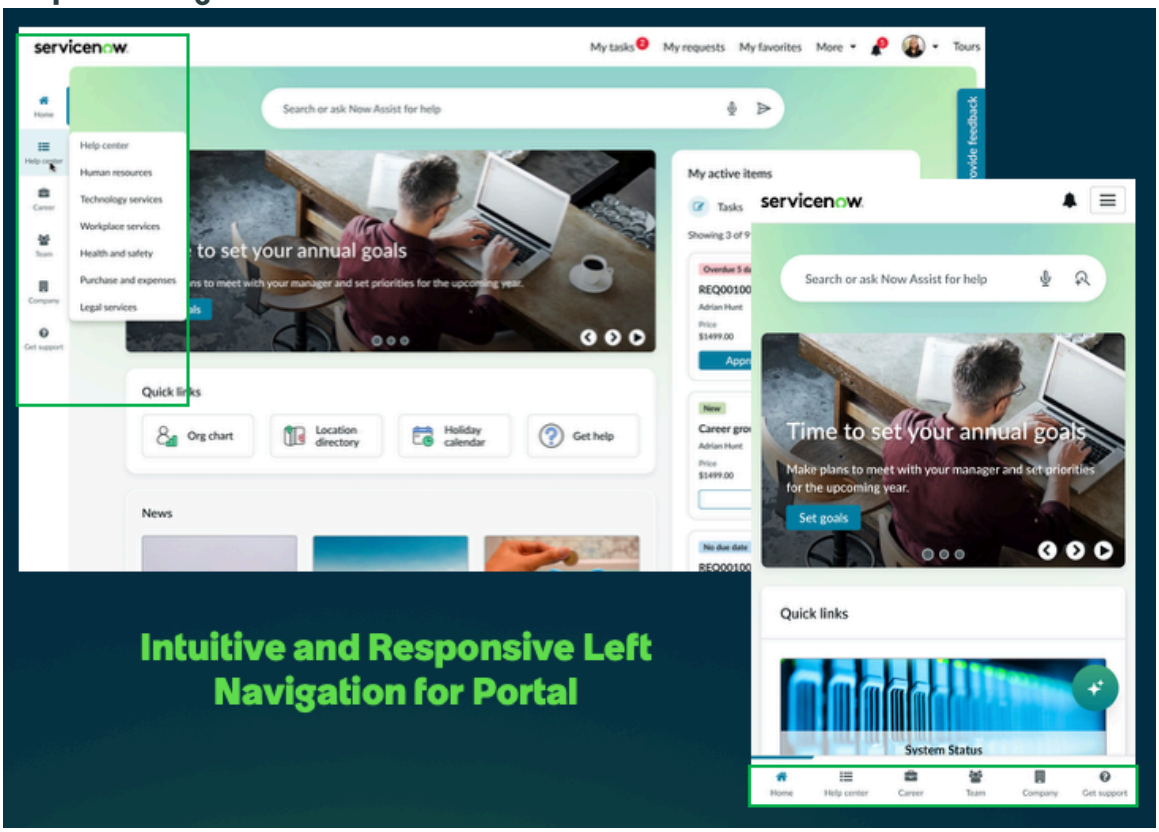
Simplified navigation overview



You can configure the simplified navigation in the following steps:

- Streamline navigation setup from Advanced Portal Navigation by creating a record.
- Select side navigation style and a set of predefined icons for consistency and usability.

Note: Migrating your existing navigation structure to simplified left navigation is easy.

Simplified navigation: Useful tips and information

Use some of the following guidance and tips.

- When the screen size is below 760 pixels, navigation switches to a mobile-friendly bottom view. Also, the header changes to a context menu view. The items that don't fit are accessible from the **More** menu.

  Note: The **More** menu can appear on both side navigation and bottom navigation.

- Add topics up to two levels from the root-level. For example, when you add topics under Human Resources, you can only traverse from `Human Resources > Subtopic 1`.
- In the left navigation, only the first level of child menu items appears. For deeper levels, hover or click back and forth for additional menus.

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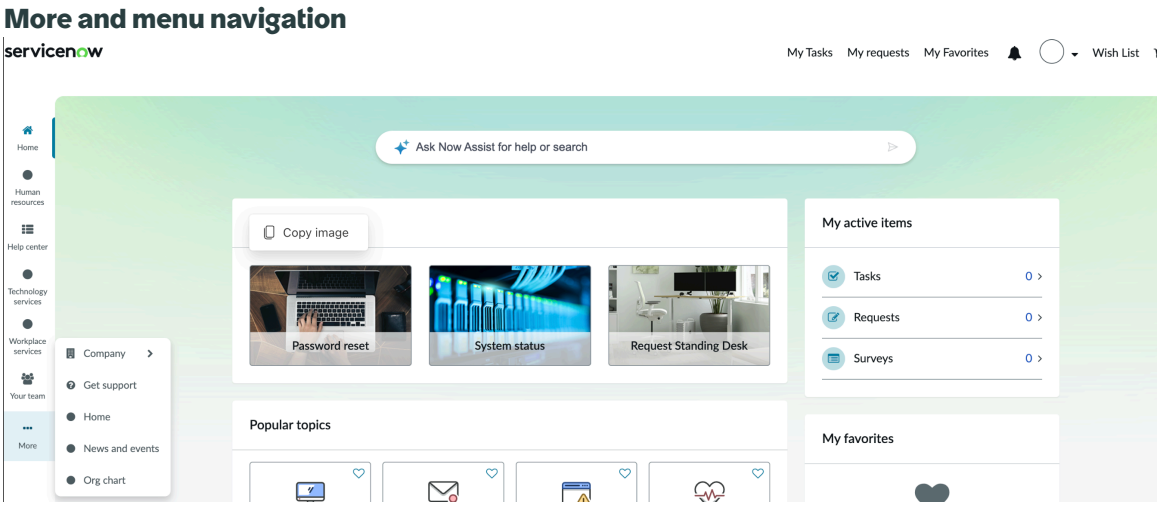

- When a sub-menu contains many items, a scroll bar appears for navigation.
- Left and bottom views are responsively adjusted as per available space.
- For the root item without any child items or any active associated quick link, only one-level is visible on click.
- When left navigation option is selected, the sync is supported up to one-level only.

Note: For top navigation option, sync supports up to three levels of sub-navigation.

For configuration steps, see Configure simplified left navigation.

Configure simplified left navigation

Simplified navigation helps use an intuitive navigation for better information architecture and topic discovery.

Before you begin

Before you start, ensure that you understand the useful information available in EC Information architecture.

Role required: Admin and SP Admin

About this task

Using advanced portal navigation, you can enable single-click sync across all APN hierarchy levels, replacing level-by-level sync. You can design the primary navigation menu and configure the navigation setup as per employee needs and content priorities.

Procedure

1. Navigate to **All** > **Employee Center** > **Advanced Portal Navigation**.
2. Click **New** to create a new record or view the list of the available APN records.
3. Select **Active** to replace the current Employee Center with the new navigation menu.
4. Fill in the form as explained in Configure advanced portal navigation and select **Navigation style** as **Side**.

Note: On selecting side, you can see an option to specify **Default icon** and related list also shows **Menu icon** as shown in the following image.

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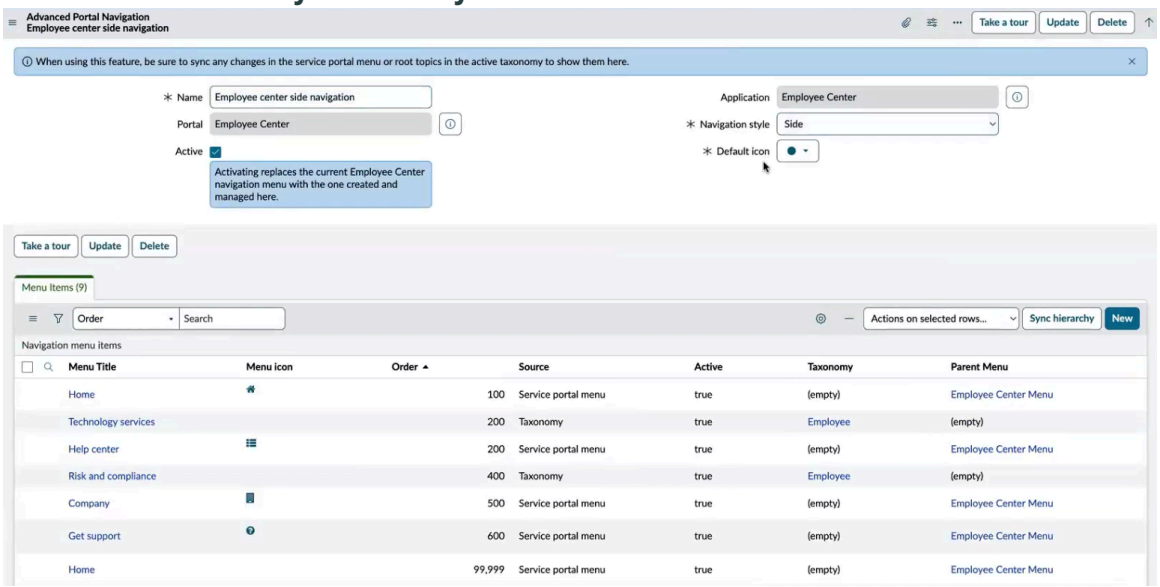
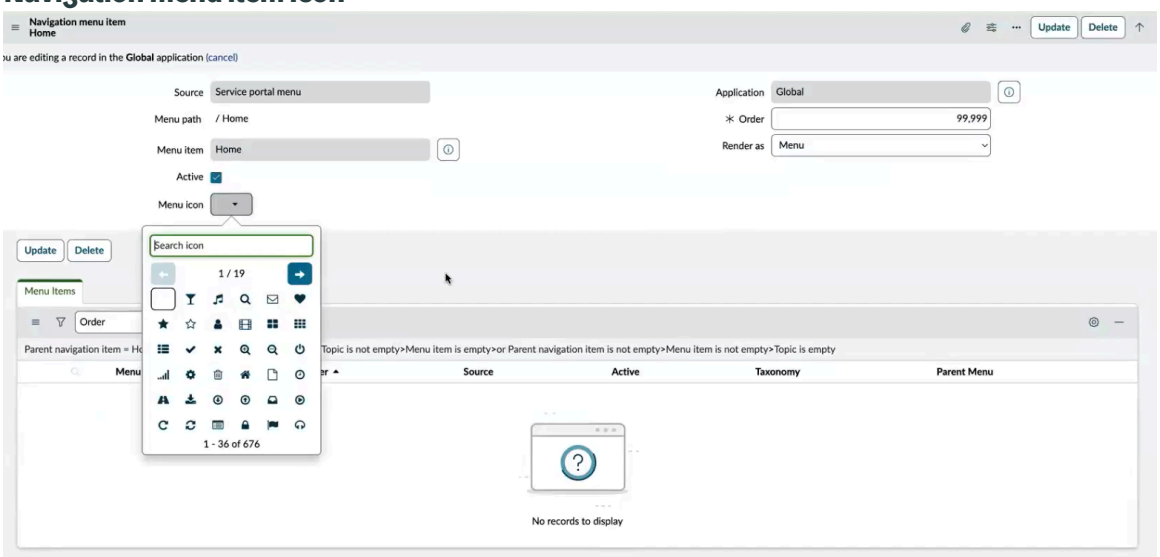
APN Menu items and sync hierarchy



Note: When you don't select the icon, the default icon is displayed.

5. Use the default or change the icon from the **Navigation menu item** related list.

Navigation menu item icon



6. Use one of the options to create a new or fetch the existing hierarchy.
   a. Click **New** to create or add from the available list.
   b. Click **Sync hierarchy** to fetch existing items.
7. Click **Save**.

Result
Simplified navigation record is saved. Your employees can view the new left navigation from Employee Center.

Guided Self-Service in Employee Center

Empower employees with easier self-serve capabilities through guided experiences to improve productivity and efficiency.

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A new plugin **Guided Self-Service** (sn_ex_sp_gd_help) in Employee Center enables employees with an intuitive Question-and-Answer (QnA) powered self-service.

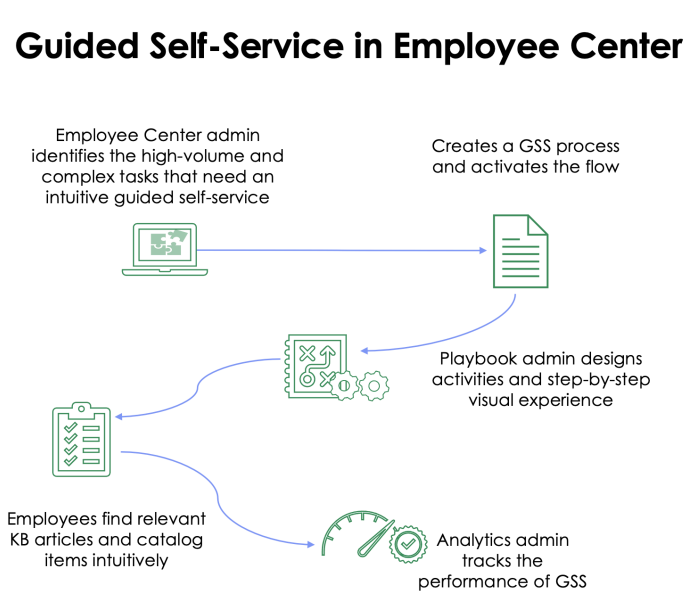
Guided Self-Service (GSS) overview

With an in-context visual way to navigate the complex work scenarios, admins can design adaptable self-serve workflows that can enhance overall organizational productivity, engagement, and efficiency.

Using the Guided Self-Service, employees can self-serve with step-by-step assistance and navigate their way to the relevant article or catalog item. Guided Self-Service can

- Self-serve with easy access to information, processes, and resolutions for day-to-day work.
- Discover and use the GSS processes through AI-powered search.
- Make information and solutions easily accessible to employees with varying levels of knowledge or experience.
- Guide employees to the relevant article or catalog form through a visual Question-and-Answer (QnA) experience.
- Leverage prebuilt activities and templates for self-service help use cases, powered by playbooks.
- Streamline authoring for non-technical users with playbook designer usability enhancements.
- Optimize the employee self-service capabilities for complex and high-volume topics.
- Streamline authoring for non-technical users with playbook designer usability enhancements

Guided Self-Service experiences



Intuitive Q&A-powered self-service

Guided Self-Service (GSS) in Employee Center helps employees self-serve easily on high-complexity and high-volume topics.

Key capabilities

- Guide employees to the right article or catalog form through a visual Q&A experience.
- Easy authoring for non-technical users with playbook designer with usability enhancements.
- Leverage pre-built activities and templates for self-service help use cases, powered by playbooks.

Provide Guided Self-Service that caters to the frequent needs of employees. You can display Guided Self-Service as a widget on the home page or as a quick link or as a widget on topic pages.

Note: Discover and use the GSS processes through AI-powered search based on the title and description.

Prerequisites

Guided Self-Service in Employee Center has a dependency on the Employee Center and applications. Ensure you complete the following steps before getting started with GSS.

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- Ensure you activate the Employee Center application first before installing the **Guided Self-Service** in Employee Center app from ServiceNow Store.
- Ensure you have Workflow Studio and its components such as Playbooks.
- Ensure that the **sn_hr_sp.esc_admin** user has the **playbook.write** role to edit the playbook design and **playbook_experience.admin** to preview the guided experience.

Know more about Playbooks and Workflow Studio

Playbook provides a visual representation of step-by-step process involved in self-servicing employee needs and requirements such as *`Know your benefits`* and *`Time off request`*.

- Design the visual workflow to guide employees to find relevant article or catalog items.
- Use the playbook capability to help employees with the what-to-do-next option.
- Provide a way to visualize and interact with the workflows in real time via a simple and task-oriented view.

Understand the basics of playbooks and workflow studio. Ensure you have working knowledge of the following processes:

- Exploring Playbook
- Playbook builder
-
- Building your first playbook
- Create a flow in Workflow Studio
- Create a playbook
- Building Playbooks

Related topics

Guided Self-Service reference

Use Guided Self-Service

Configure Guided Self-Service

Guided Self-Service (GSS) helps create a playbook for all the useful content for employees.

Before you begin

Ensure you activate the Employee Center application first before installing the **Guided Self-Service** in Employee Center app from ServiceNow Store.

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > **Employee Center** > **Guided Self-Service**.
2. Click **New** or open an existing record.
3. On the form, fill in the fields.

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Guided Self-Service form

Field	Description
Name	Name of the record. **Note:** When you update or rename the name, ensure you (re)activate the GSS.
Active	Check the box to activate. **Note:** Only active items appear on the widget.
Oder	Option to display the order Guided Self-Service process available.
Description	Description that you enter in this field overrides the default short description of the GSS.
Process	Name of the process.
Application	Application scope.
Available for	Option to make GSS available for only the selected users, groups, roles, and more.
Not available for	Option to make the GSS unavailable for.

4. Click **Save** or **Submit**.
   Related tabs Available For, Not Available For, and Assigned Topics appear.

   Note: By default, only sn_hr_sp.esc_admin user role can add GSS to the topics and topic persona users (such as Topic Managers and Contributors) can't add GSS to the assigned topics.

   GSS Help topic selection

5. On the Assign Topics tab, click **Add**, select the topic, and click **OK**.

   Note: When you assign the guided process to a subtopic, the help process appears on the topic page and its parent topics. For example, in `Human resources > Benefits`, when a Guided Self-Service is assigned to a subtopic Benefits, the guided self-service appears on its parent topic also.

6. On the **Available For** and **Not Available For** tab, select the users, groups, roles, and more.
   User criterion is defined for Guided Self-Service.

   Note: When a user or user group doesn't have permission to a catalog or a KB article, the `You do not have access to this item` message appears. You can contact the admin for permissions.

7. Click **Save** or **Update**.
   Remember, you can't configure multiple questions within a single questionnaire.

   Note: The incomplete selections are cancelled daily by a schedule job.

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What to do next

Click the **Edit in Process Automation Designer** button to define and publish the process for the Guided Self-Service after you create the process. Proceed to edit the playbook from **Workflow Studio**.

Note: Ensure you mark the guided process and playbook active. Only when you activate the GSS process, the **Add** button is displayed on the Assigned Topics.

Related topics

Guided Self-Service reference

Associate Guided Self-Service Process to a topic

Use Guided Self-Service

Build a visual flow for Guided Self-Service

Create a visual playbook flow of activities so that employees can find information in a more intuitive and visual way.

Before you begin

Understand the basics of playbooks and workflow studio Building Playbooks.

Review the information from Guided Self-Service reference.

Role required: sn_hr_sp.esc_admin, playbook.write

Procedure

1. Follow the instructions available in Create an activity definition.
2. On the Workflow Studio, use the existing questionnaire activity available from **Add activity** > **Common Activities** > **Questionnaire** for authoring question and answer flow.
   Here is a sample illustration of the entire flow.

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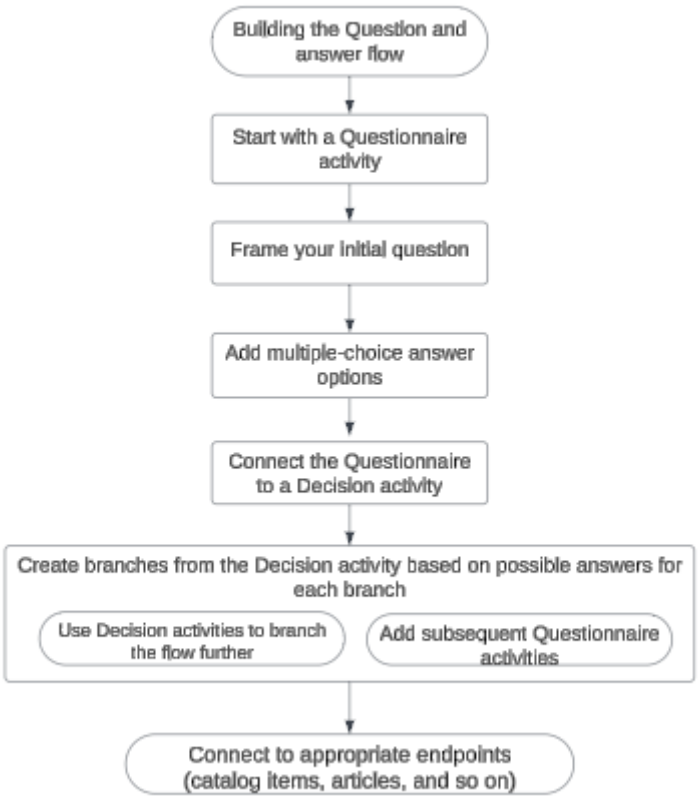
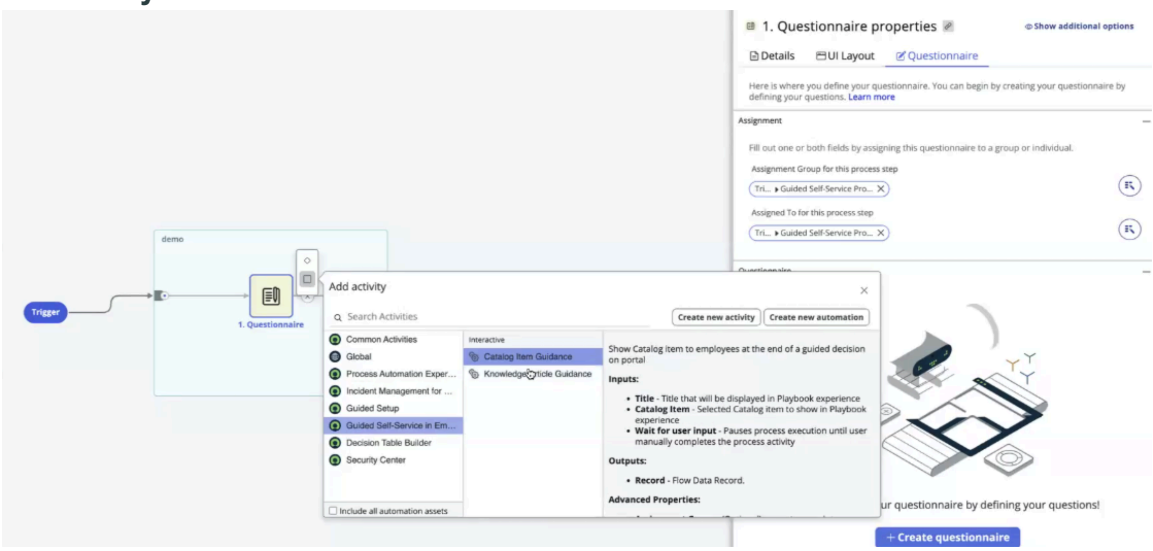
Visual flow



Each activity definition contains some basic configuration details, as well as an automation plan and activity experience. Table is Guided Self-Service (GSS) Process Execution.

3. On the Workflow Studio, use the new GSS-specific activities.
   - **Add activity** > **Guided Self-Service in Employee Center** > **Catalog Item Guidance**.
   - **Add activity** > **Guided Self-Service in Employee Center** > **Show Knowledge Article Guidance**.
   - **Add activity** > **Common Activities** > **Instruction Activity**.

Add activity



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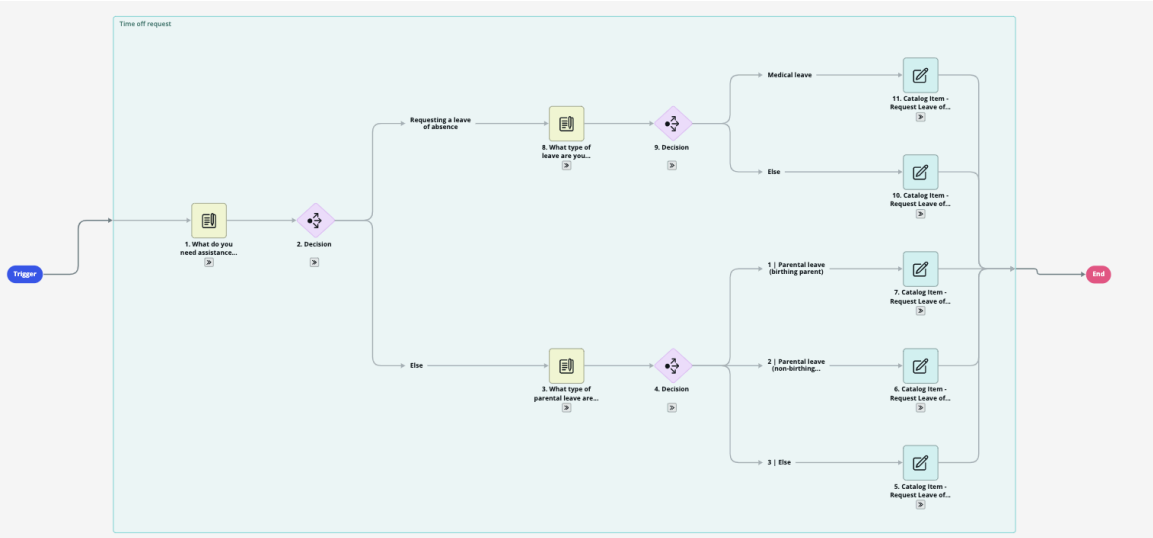
For more information, see the activity information such as Input, Output, and Advanced Properties on the UI.

4. On the Workflow Studio, customize triggers, flows, decisions, and so on.
   Here is a sample illustration for time off flow.

Step-by-step playbook flow



Note: Ensure you configure the Restart operation for every activity in the flow. When only one activity has the restart operation, it won't work.

Based on the security access and user permissions, the catalog items and KBs appear. For more information, see Create a playbook.

Note: The Activity Definition [sys_pd_activity_definition] table lists the definitions for the activities that you can add to a playbook in **Workflow Studio**.

5. Click **Activate**.

Note: Only when you activate the GSS process, the **Add** button is displayed on the **Assigned Topics**.

Result

GSS is configured to guide employees. For more information, see Use Guided Self-Service.

Guided Self-Service Usage Insights

Visually analyze Guided Self-Service usage, user behavior, and other information from the Usage Insights dashboard.

You can use the dashboard to view the information about the Guided Self-Service usage, engagement, and adoption.

Navigate to **Usage Insights** > **Dashboard** > **Guided Self-Service** for a detailed view and analysis. Click the respective widget or chart for more information. You can create a funnel to track session adoption and abandonment.

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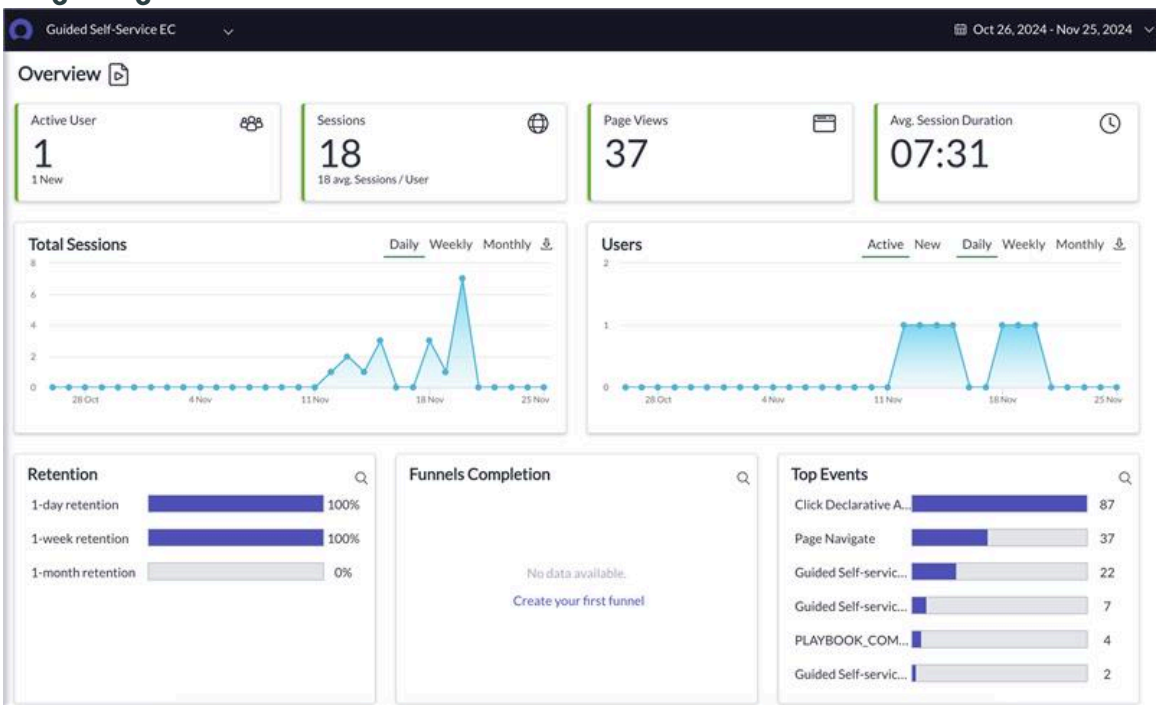
Usage Insights dashboard - Guided Self-Service



Widgets

The dashboard provides the following metrics:

- **Page Id**: Indicates the occurrences based on the page Id.
- **Title**: Indicates the occurrences based on the title of the Guided Self-Service.
- **Source**: Indicates the occurrences based on the source such as Quick link.
- **User Id**: Indicates the occurrences based on the user.
- **Events**: Indicates the events based on the user.
- **Retention**: Indicates the retention info.
- **Funnel**: Indicates the funnel details based on the user.

User and roles

Roles required for Usage Insights dashboard

Users	Required role
Analytics portal admin	portal_analytics_admin
Analytics viewer	analytics_viewer, mobile_analytics_viewer, web_analytics_viewer, portal_analytics_viewer

User behavior

View and analyze the information available in your dashboard. You can track user behavior and app usage on the app launcher.

- View the Guided Self-Service that employees launch frequently.
- Track monthly and daily user activity.

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- View number of user clicks by Guided Self-Service from home page, topic page, and quick links.
- Analyze the trend of user activity periodically.
- Assess the user behavior and insights and drive business decisions.

Events

Events list can help you understand usage patterns, features popularity, and identify areas for improvement.

- Click Declarative Action: A declarative action that the user clicked such as restart, start over, continue, complete, edit responses.
- Page Navigate: A user navigates to Guided Self Service page.
- Guided Self-service Catalog item shown: The self-service catalog item that the user interacted with.
- Guided Self-service Knowledge article shown: the self-service knowledge base articles that the user interacted with.
- PLAYBOOK_COMPLETED: A guided process (playbook) that the user completed.
- Guided Self-service Action clicked: The action button that the user clicked.

Funnel analysis

A funnel analysis shows the percentage of users who completed a desired action along a critical path in your application.

Retention

View data such as how many new users you have and how many returned. User retention data also shows you the frequency of user sessions and the average time in between sessions given a certain time period. User retention analytics can help you

- Use cohort analysis to identify a month, week, or day retention.
- Compare retention analytics across time periods, versions and devices.

Modify the Guided self-service widget display

The widget displays the help content for the Employee Center Pro Kiosk user. You can configure the instance options based on your display preferences.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to Employee Center or Employee Center Pro Kiosk home page.
2. Click the **Guided Self-Service** widget.
3. Press and hold the control key on the keyboard, right-click the widget, and then select **Instance Options**.
4. Configure the instance options.

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Widget instance options

Instance option	Description
Data Guided Help Processes	Select the processes for guided self-service. For example, `Email recovery` or `Password reset` **Note:** Ensure the guided help process is marked active for display on the widget.
Load Configuration	Sets how the order in which the page and widgets data loads. Select one of the following options: Asynchronous: First the page loads, then the widgets data loads. Users see content appear in the widgets as soon as each individual widget loads. Synchronous: Page and widget data loads at the same time. The page remains blank until all the data loads.
Show empty state	Allows the widget to appear if there are no published news articles

Note: These options are available from the home page widget only. The topic page widget doesn't show the options.

5. Click **Save**.

Related topics

Guided Self-Service in Employee Center

Cross-channel favorites

Cross-channel **favorites** capability provides quick access to the content the employees use frequently and offers extensibility for BUs.

Employees can view and access their favorited content directly from the **My Favorites** widget on the Employee Center home page or from the **My Favorites** link on the global navigation bar.

By default, favorites (sp_favorite) are enabled for Employee Center and MESP portals for **Requests**, **Articles**, and **Applications** content types.

Note: The **Favorites** option for **Applications** is available to only EC pro customers as **App launcher** is an EC Pro feature.

Employees can see the favorites icon on the following types of pages or sections:

- Topic page
- Catalog page detail view
- Knowledge page detail view
- Service catalog page

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- My applications page
- My applications widget
- Recommended for you widget

You can set up the favorite card details and use the default favorite icon to bookmark content as your favorites. When your employees mark content as favorites, the favorite icon appearance changes to .

Note: To change the icon, go to **Service Portal** > **Portals** > **Employee Center** > **Quick start config**, and update the icon.

My Favorites

You can access all your favorite items on the widget from **My Favorites** of the Employee Center home page header. Browse the list of your favorites, sort by date or recency, and see card view and list view.

The **My Favorites** widget appears only when you mark some content as your favorite. However, you can show the empty favorites widget on the home page when you select **Show empty state** from the instance options.

Favorites sorting

You can configure the sort order of the favorited items using instance options. On configuration, your employees can sort the favorites from the favorites section in one of the following ways:

- **Recently Accessed**
- **Date Added (newest)**
- **Date Added (oldest)**

To fix issues with alphabetical sort order of favorites, see KB1348001.

Favorites and topic security

You can configure user permissions such as **Available for** and **Not Available for**. When the favorited topic is not marked available for the user, the topic isn't visible from **My Favorites** and on the favorites widget.

For more information, see Enable user criteria for topics.

Favorites troubleshooting

Follow these steps to troubleshoot issues with **Favorites**:

- For upgrades, you can allow the RCAs related to favorites.
- Ensure you install and update the latest plugins.
- On the sp_portal table, set **Enable favorite** value to **True**.
- Remember, any customizations may impact the display and functionality of the favorites.
- Favorite applications cannot be viewed from Now Mobile.

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Related topics

Configure favorites option

Manage favorites

Configure favorite content type

Configure the favorites option to help employees personalize the content and easily access the content they frequently use.

Before you begin

Role required: portal admin and sp_admin

About this task

You can configure the favorites and favorite icon. Once you enable favorites for content types such as requests, articles, and applications (EC Pro only), your employees can mark content as favorites.

Note: Favorites for **Applications** is available to only Employee Center Pro customers as Applications is an Employee Center Pro feature.

You can configure favorites for content types of your choice.

Procedure

1. Navigate to **All** > **Favorites** > **Favorite Content Type**.
2. Specify the content type.
   For example, **Article**.
3. Select **Badge icon** from the available list.
4. Select the **Active** option.

Result

The content type display is configured.

Configure favorite content type on Mobile

Configure the favorites option on Mobile to help employees personalize the content and easily access the content.

Before you begin

Role required: portal admin and sp_admin

Procedure

1. Navigate to **All** > **System Mobile** > **Mobile UI** > **Mobile**.
2. Edit the mobile UI rules to suit your needs.
   See Mobile UI Rules and configure the following field values.

Mobile UI Rules

Field	Description
Condition	For the **Condition** field, specify `text_02=sysId`, where sysId indicates the the sys_id of the new **Favorite Content Type** record. This rule applies only to the favorite items that belong to this content type.
Parent	My favorites (without image)

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Field	Description
Parent Table	Mobile View
Trigger	OnLoad

Mobile UI Rule Action

Field	Description
Target	text_01
Operation	Set UI Style
Value	Example JSON`{ "TextDecorator": { "Type": "Font", "FontName": "now-mobile-icons", "Value": "f15c", "FontColor": "#333E3F" } }`

When the content configuration associated with this content type can have images to render on the favorite card, create another record with the parent value as **My favorites (with image)**

3. Create a function and function instance to suit your needs.
See Create a function and function instances and configure the following field values.

Mobile Function

Field	Description
Table	Favorite (App Use) [sn_ex_sp_st_favorite].
Conditions	Add appropriate conditions so that this function only applies on desired content types.
Parent	Set the table name to *sys_sg_master_item* and document to My favorites (without image).

Result
The content type display is configured for Mobile.

Related topics
Now Mobile app

Mobile plugins

Configure favorites option

Configure the favorites option to help employees personalize the content and easily access the content they frequently use.

Before you begin
Role required: sn_hr_sp.esc_admin and sp_admin

About this task
You can set up the favorite card details and use the default favorite icon ♡ to bookmark content as your favorites. When your employees mark content as favorites, the favorite icon appearance changes to ♥.

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Procedure

1. Navigate to **All** > **Favorites** > **Favorite content configuration**.
2. Click **New** or update an existing configuration.
3. On the form, fill in the fields.

Favorite Content Configuration form

Field	Description
Content Type	The type of content on which the favorites icon can appear. The following content types have the favorite icon by default: ○ **Requests** ○ **Articles** ○ **Applications** ○ **Topic page**
Table	Name of the table from which the data is fetched.
Application	The scope of application.
Order	Order in which you want the favorites content to appear. **Note:** The order in the favorite content configuration table doesn't determine the sequence in which content types appear on the navigation of the Browse favorites section of the ESC portal. See Manage favorites.
Active	Option to activate the favorite functionality on the associated content type.
Condition	Conditions to meet for the Favorite functionality. The conditions available are dependent on the table that you select.
Display Configuration	Display settings for the favorite card. Select appropriate configuration to display on the favorite card. Ensure you select minimum fields for performance improvement. ○ **Availability**: The available options are: ▪ Mobile only ▪ Desktop only ▪ Desktop and mobile ○ **Primary field to display** (Mandatory): Select name or short description. ○ **Secondary fields to display** (Optional): Description of article or catalog item. ○ **Image** ○ **Image URL** **Note:** When content type has both the image and image URL, the image takes precedence to display. **Note:** **For optimal performance**, use the primary field and do not specify other fields.

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Field	Description
Navigation Configuration	Navigational settings for the favorite icon. Select the following options: ○ **Navigation type** ○ **Internal** You can specify the portal page and parameters for navigation. ○ **Specify Portal page**: You can select from the available options such as Page ID or Field. Based on your selection, provide any additional parameters: ▪ **Portal page** ▪ **Field** ▪ **Template** ○ **URL parameters**: Specify the parameters as required. ○ **External**The user selects the external navigation type between URL and field. For *URL*, the user specifies the URL and parameters (if any). For *`Field`*, the user selects the field from the table.

Note: When you experience performance issues, use the primary field and do not specify other fields such as Image and image URL.

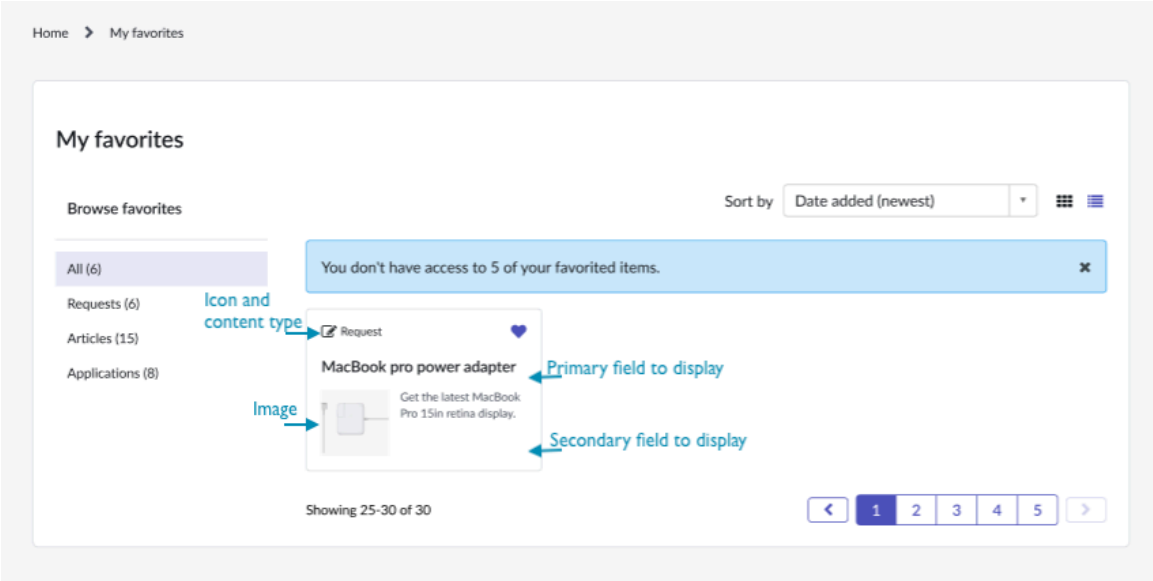
4. Click **Submit**.

Result

The favorites appears on the Employee Center and MESP portal.

Here's a sample illustration of how the configuration looks on the **Favorites** and the message when a favorites is not available for your access.

Favorites card and access



For more information on how Favorites appear, see Manage favorites.

Disable favorites

Enable or disable the favorites options to display the favorites icon and access your favorites list for quick use. Favorites functionality is enabled by default on Employee Center and MESP.

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Before you begin
Role required: admin

About this task
Using the **Favorites** option, you can do the following:

- Display the favorite icon on the supported content types in portal and app.
- Display the **My Favorites** menu item in the portal header.
- Access the list of all your favorites that are bookmarked for quick reference from the menu item.

The **Favorites** feature is enabled by default.

Note: For portals other than EC and MESP, you can enable the favorites option by selecting the **Enable favorites** from **Service Portal** > **Portals** > **Employee Center** > **Quick start config**.

Use the following steps to disable the favorites option.

Procedure
1. Navigate to **All** > **Employee Center** > **Administration** > **Portal configuration**.
2. Edit the portal to suit your needs.
   For more information on the portal form fields and description, see Create a portal.
3. On the Employee Center portal, deselect the **Enable favorites** option to disable **My favorites** in the portal.
   On MESP, Favorites is enabled by default.

   Note: To disable **Favorites** on MESP, contact support.

Result
The Favorite functionality is turned off.

Remove favorites

Enable the RCAs to manage the favorites options from the Employee Center.

Before you begin
Set the Application Restricted Caller Access on the **Table: Portal Favorite**.

Role required: admin

About this task

Procedure
1. Navigate to **All** > **System Definition** > **Tables** > **Favorite**.
2. On the sp_favorite, go to the **Application Access** tab.
3. Ensure you select all the following options with the **All application scopes**.
   - Can read
   - Can create
   - Can update

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- Can delete

Note: When you do not select the Delete operation with **sp_favorite**, you are unable to remove the favorite from your favorites. The following message appears.

```
Delete operation against 'sp_favorite' from scope
 'sn_ex_sp' has been refused due to the table's
 cross-scope access policy
Unable to remove this item from your favorites.
```

Result

The **Favorite** functionality is enabled and you can perform the specified CRUD operations.

Modify the my favorites widget display

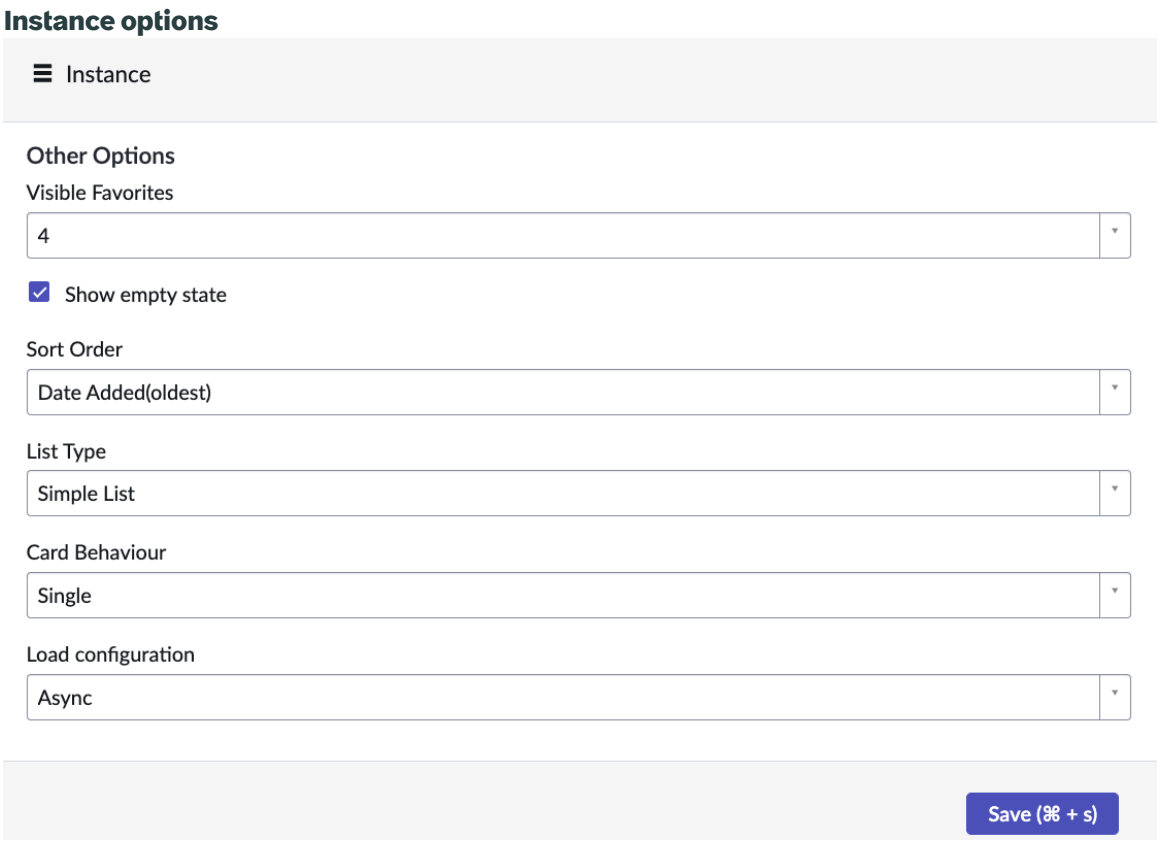
The **My Favorites** widget displays the favorited content for quick use. You can configure the instance options to control the appearance of the widget, such as the title and number of items to display you want to view.

Before you begin

Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Press and hold the control key, right-click the Favorites widget, and then select **Instance Options**.
   Instance options page appears.



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3. Configure the instance options.

Instance options for Favorites

Instance option	Description
Visible Favorites	Number of favorites to show. Default value 4.
Show empty state	Opt in to show the widget with empty state message when no content is marked as favorite.
Sort Order	Sort order of favorite items you want to view on the widget. The choices are: ○ **Recently Accessed** ○ **Date Added (newest)** ○ **Date Added (oldest)** Default value: Recently Accessed
List Type	How you want the items to appear on the widget. The choices are: ○ **Card List** ○ **Simple List** Default value: Simple List
Card Behavior	The way you want the card to appear on the widget. The choices are: ○ **Single** ○ **Wrap** Default value: Single
Load Configuration	Select the list of Load configuration option. ○ **Async** ○ **Sync** You may make the load configuration Synchronous for the widgets visible on the Home page for better load experience.

4. Click **Save**.
   For more information, see Cross-channel favorites.

Recommended for you

Recommended for you displays catalog items and knowledge articles, enabling you to view information that is most relevant to you.

Content recommendations

This widget highlights the most relevant catalog items and knowledge articles for the employee:

- The **Recommended for you** widget can use an ML algorithm-based on Employee Profile or HR Profile to show popular content accessed by users having similar profile.
- Recommended items are populated either based on ML or popularity of items based on your license entitlements. Underlying table for calculating similar user is determined by Employee Profile or HR profile.

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Note: When you install Employee Profile, the recommendations are populated based on the Employee Profile table.

- The visual representation of items has a detailed card view with title, description, image, and a simple list view of only titles.
- Employees can view related articles and catalog items on the portal home page and on ServiceNow mobile page.
- By default, the top five recommendations are visible on the widget. The widget provides users with a preview of a knowledge article with the title, description, and other useful information. Similarly, the catalog items show the description and the price of the product, if any.

Prerequisites

Learn about the version, license, and other requirements to use **Recommended for you**.

- The widget is available for Employee Center versions 23.0.7 and later.

Note: ML-based recommendations are available only for EC Pro customers or PI entitlement such as HRSD Pro, ITSM Pro, LSD, WSD.

- Enable Employee Profile first to activate recommendations based on the Employee Profile table. Employee Profile is used to formulate recommendations that have similar profile users. For more information, see Manage the employee profile AI and ML model

To make the widget visible on the Employee Center home page:

1. Verify that an active taxonomy is associated to the Employee Center portal record.
2. Verify that you run *`Set primary topics for Employee taxonomy`* manually after installing the application.
3. Verify you have articles or catalog item with non-empty **Taxonomy Topic** field.

For more information, see Configure the Recommended for you

How Recommended for you works

Administrators, developers, and advanced users can configure the widget options. **Recommended for you** highlights the most viewed knowledge article and most requested catalog items across all employees for a time period defined in the Modify the Recommended for you widget display by the portal administrator.

- Knowledge articles recommendations are based on the view count of article.
- Catalog item recommendations are based on the number of times it is requested for.
- The recommendations associated to the portal taxonomy are displayed on the home page.

Note: The sys property (enable_topic_content_lang_fallback) disables the language fallback for KB articles, feature content in topics, and the Recommended for you widget. When the value is false, content isn't evaluated from the fallback language and only user preference language content is displayed.

Related topics

View the Recommended for you content

Configure the Recommended for you

The Recommended for you widget displays catalog items and knowledge articles, enabling you to view information that is most relevant to you based on the taxonomy.

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Before you begin
Role required: sp_admin or admin

Procedure
1. Navigate to **All** > **Employee Center** > **Administration** > **Portal configuration**.
2. Edit the portal to suit your needs.
   For more information on the portal form fields and description, see Create a portal.
3. Map the **Taxonomy** that you created or use the default **Employee** taxonomy at the portal level.
   For more information on taxonomy, see Unified Taxonomy for Employee Center.
4. Navigate to **System Definition** > **Fix Scripts**.
   a. Search for *`Set primary topics for Employee taxonomy script`*.
   b. Run the script manually to update the *`taxonomy_topic`* field for the articles and catalog items associated to the employee taxonomy.

Result
The script fixes the **Recommended for you** and search, if Employee taxonomy is associated to the portal. Updates the taxonomy_topic column in the knowledge articles and catalog items to the corresponding mapping found in m2m_connected_content table.

From the content associated to the taxonomy, most viewed or recommended articles or catalog items are fetched and displayed to the employee.

What to do next
You can proceed to configure the instance options to control the appearance of the widget, see Modify the Recommended for you widget display

Modify the Recommended for you widget display

The Recommended for you widget displays catalog items and knowledge articles, enabling you to view information that is most relevant to you. You can configure the instance options to control the appearance of the widget, such as the title, number of items to display, and what category of items you want to view.

Before you begin
Role required: sp_admin or admin

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Press and hold the control key, right-click the Recommended for you widget, and then select **Instance Options**.

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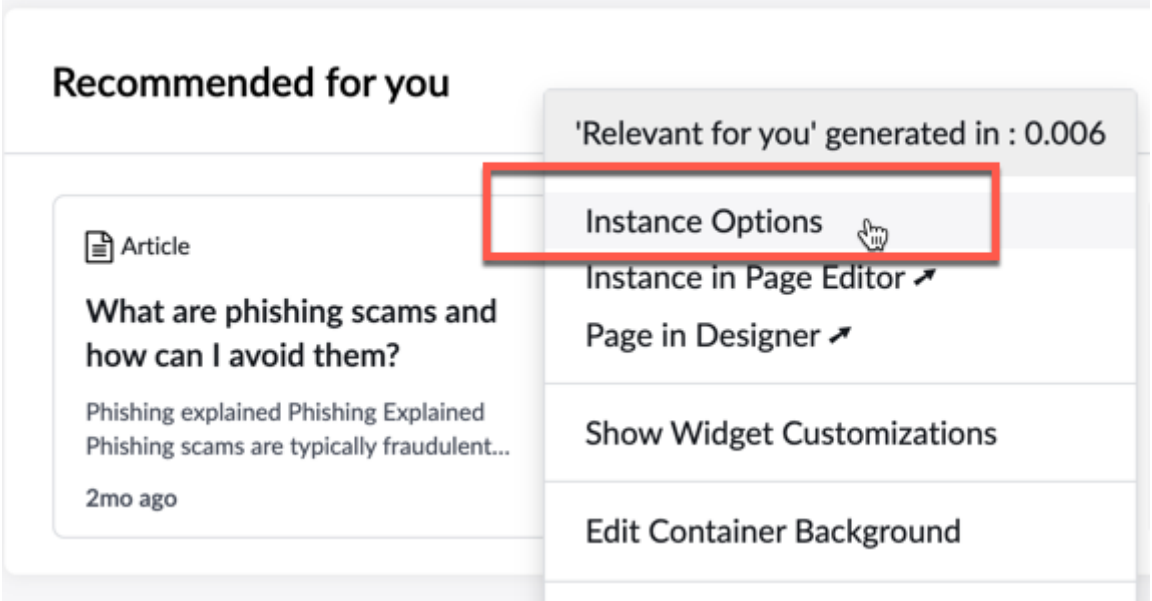

3. Configure the instance options.

Recommended for you instance options

Instance option	Description
Number of similar users used for prediction	Number of similar users for prediction. For example 25.
Recent activity cut off in days	Recent activity cut off in days. For example 30 days.
Title	Title of the widget.
Limit	Number of items to display in the widget. Default value: 3
Category	What category of items you want to view on the widget. The choices are: ○ **knowledge** ○ **catalog** ○ **knowledge and catalog** Default value: knowledge and catalog
List Type	How you want the items to appear on the widget. The choices are: ○ **Card List** ○ **Simple List** Default value: simple list
Card Behavior	The way you want the card to appear on the widget. The choices are: ○ **single** ○ **wrap** Default value: single

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Instance option	Description
Load Configuration	Order in which the page and widgets data loads. Select one of the following options: ○ Asynchronous: First the page loads, then the widgets data loads. Users see content appear in the widgets as soon as each individual widget loads. ○ Synchronous: Page and widget data loads at the same time. The page remains blank until all the data loads.
Show empty state	Option to show the widget with empty state message.

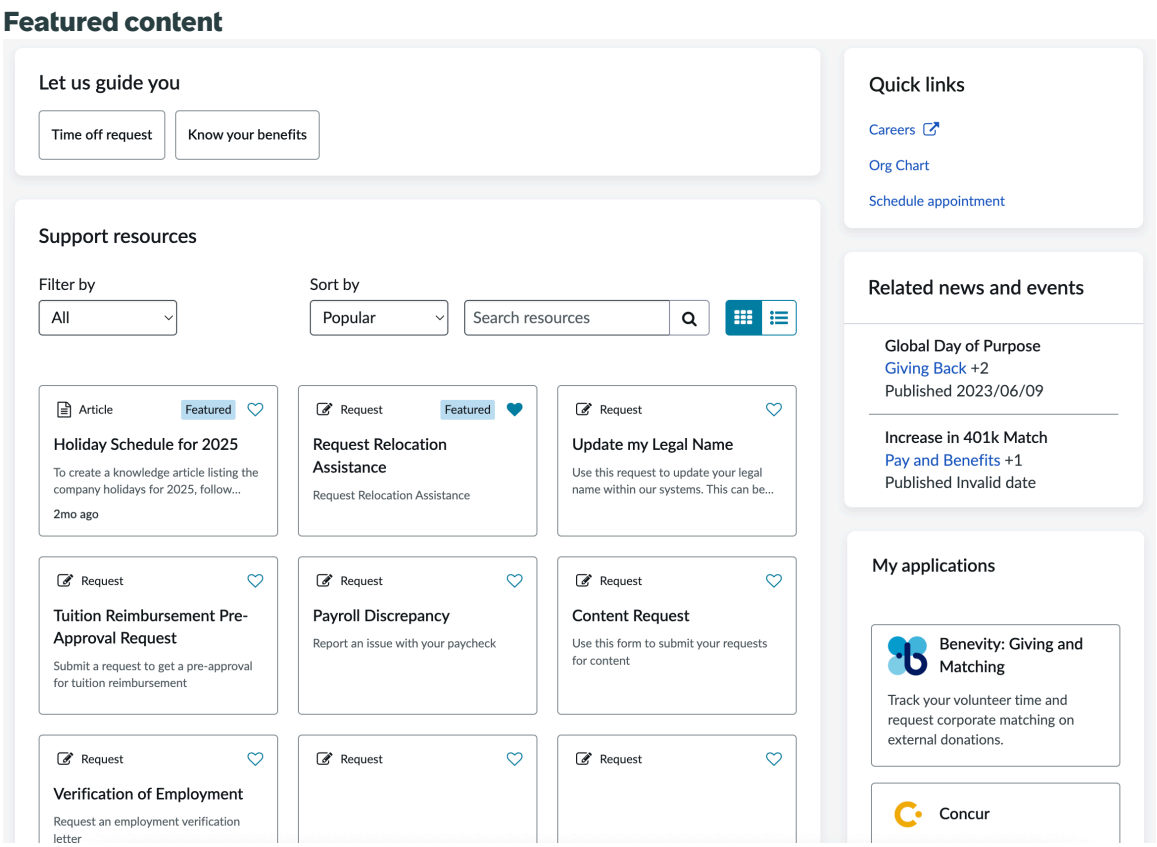
4. Click **Save**.

Featured content

Using featured content, administrators can highlight important resources, articles, and catalog items prominently for employees.

Gain visibility into new and invalid content and manage content life cycle through automation for performance improvement.

Mark the most important content as featured content so that employees can quickly discover and use the content.



- Mark articles, catalog items, or other resources as featured within a specific topic.
- Highlight the items at the top of topic pages to improve discoverability.

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- Ensure employees see high-impact information first.
- Personalize user content experience on widgets.For more information, see
  - Associate featured content to a topic
  - Featured Content form

Featured Content form

Use the featured content form to mark the associated connected content as featured content for a topic.

Featured Content form

Field	Description
Connected Content	Connected content associated with the topic. Search for and select the connected content associated with the topic. **Note:** You can't add a quick link as a featured item.
Topic	Topic in which you want the featured content to appear.
Order	Order in which you want the featured content to appear.

Quick links

Quick links are a way to quickly access internal and external resources related to specific departments within your organization. You can create quick links, associate quick links to topics, and restrict access to quick links.

Quick links are available on the Browser Extension for Employee Center. For more information, see Browser Extension for Employee Center.

Create a quick link

You can create quick links using the quick links module in the Employee Center for accessing internal and external resources, such as knowledge bases, catalog items, pages, and links.

Before you begin

Role required: sp_admin, taxonomy_manager, or taxonomy_admin

About this task

You can associate quick links to topics in a taxonomy or to the Employee Center and Employee Center Pro home pages. For more information, see EC Information architecture.

Procedure

1. Navigate to **All** > **Employee Center** > **Quick Links**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Quick Link form.
4. Click **Save** or **Submit**.

Note: Remember, you can't add a quick link as a featured item.

What to do next

If you click **Save**, the **Assigned Topics** and **Available For**tabs appear.

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- Assign topics to the quick links. For more information on assigning topics to a quick link, see Assign topics to a quick link.
- Restrict access to quick links. For more information on restricting access to a quick link, see Restrict access to a quick link.

Users with the sp_admin role can add quick links to a home page using the quick links widget instance options. For more information, see Modify the Quick links widget display.

Note: The background image for quick link is now visible to external users.

Related topics

Modify the Quick links widget display

Create an external link

Guided Self-Service in Employee Center

Assign topics to a quick link

After you create a quick link, you can assign topics to the quick link. The quick link content is then displayed in the assigned topic in the Employee Center and Employee Center Pro.

Before you begin
Role required: sp_admin, taxonomy_manager, or taxonomy_admin

Procedure

1. Do one of the following:
   - (If you have the sp_admin role) Navigate to **Employee Center** > **Quick Links**.
   - Navigate to **Content Taxonomy** > **Quick Links**.

   The Quick Link module displays the list of existing quick links.
2. Click the quick link that you want to assign a topic to.
3. Click the **Assigned Topics** tab.
4. Click **Add**.
5. In the Select a Topic dialog box, do the following:

   a. From the Taxonomy list, select a taxonomy.
   The list of all the topics associated with the selected taxonomy is displayed.

   b. Select the topic that you want to assign to the quick link.

   c. Click **OK**.

   Note: Add only the root topics to the Quick Links for optimal performance. Access the subtopics through the parent topics.

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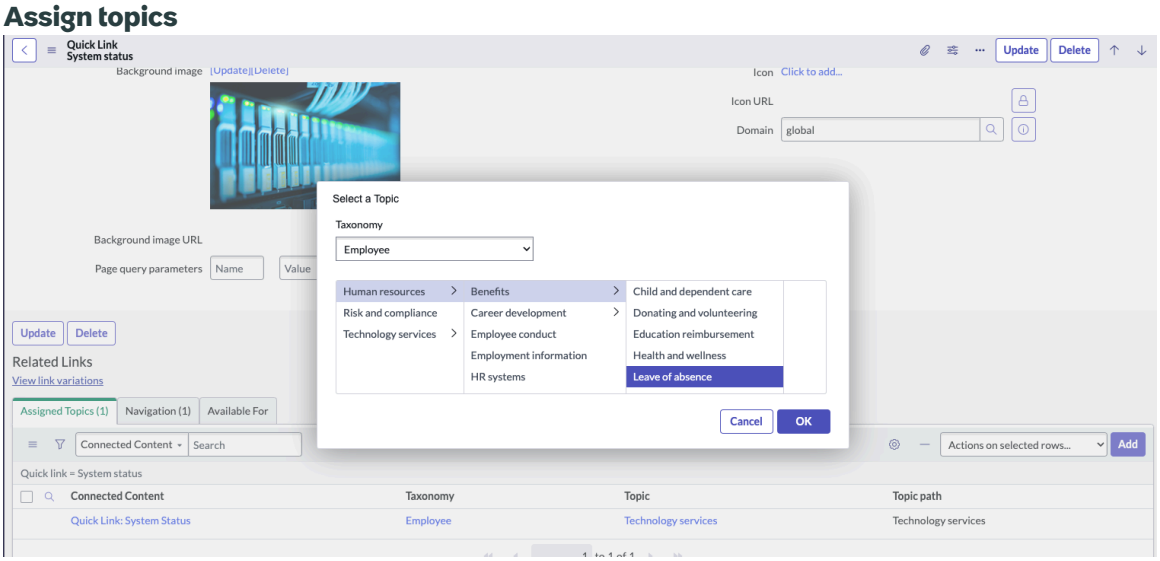

6. Click the **Navigation** tab to see the associated **Advanced portal navigation** and **Menu item**.
7. Click **Update**.

What to do next

Ensure you relog in to make the new quick links visible.

Related topics

- Modify the Quick links widget display
- Guided Self-Service in Employee Center

Restrict access to a quick link

Restrict access to quick links by setting the user criteria, which allows access only to specific users, groups, roles, and more.

Before you begin

Role required: sp_admin, taxonomy_manager or taxonomy_admin and user_criteria_admin

Procedure

1. Do one of the following:
   - (If you have the sp_admin role) Navigate to **Employee Center** > **Quick Links**.
   - Navigate to **Content Taxonomy** > **Quick Links**.

   The Quick Link module displays the list of existing quick links.
2. Click a quick link that you want to restrict access to.
3. Click the **Available For** tab.

To	Do this
Add a new user criteria	**a.** Click **New**. **b.** On the form, fill in the fields. For more information about the form fields and descriptions, see User Criteria form **c.** Click **Submit**.

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To	Do this
Edit an existing user criteria	**a.** Click **Edit**. **b.** On the Edit Members form, select the re quired roles, users, and groups from the Collection column and move them to the Available For List column by clicking the right arrow icon ( ). **c.** Click **Save**.

Create an external link

Create external links to access external resources and content. When creating a quick link, you can select an external link as the content type to display in a topic.

Before you begin

Role required: sp_admin, taxonomy_admin, or taxonomy_manager

Procedure

1. Navigate to **All** > **Content Taxonomy** > **External Links**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information about the form fields and descriptions, see External Link form.
4. Click **Save** or **Submit**.

What to do next

If you click **Save**, the **Available For** and **Not Available For** tabs appear. For more information, see Grant or restrict access to an external link.

Related topics

Create a quick link

Grant or restrict access to an external link

Control who can access external links by setting the user criteria, which allows access only to specific users, groups, roles, and more.

Before you begin

Role required: sp_admin, taxonomy_admin, or taxonomy_manager

Procedure

1. Navigate to **All** > **Content Taxonomy** > **External Links**.
   The External Links module displays the list of existing external links.
2. Click the external link that you want to grant or restrict access to.
3. To grant access to the external link, click the **Available For** tab.

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To	Do this
Add a new user criteria	**a.** Click **New**. **b.** On the form, fill in the fields. For more information about the form fields and descriptions, see User Criteria form **c.** Click **Submit**.
Edit an existing user criteria	**a.** Click **Edit**. **b.** On the Edit Members form, select the required roles, users, and groups in the Collection column and move them to the Available For List column by clicking the right arrow icon ( ). **c.** Click **Save**.

4. To restrict access to the external link, click the **Not Available For** tab.

To	Do this
Add a new user criteria	**a.** Click **New**. **b.** On the form, fill in the fields. For more information about the form fields and descriptions, see User Criteria form **c.** Click **Submit**.
Edit an existing user criteria	**a.** Click **Edit**. **b.** On the Edit Members form, select the required roles, users, and groups from the Collection column and move them to the Not Available For List column by clicking the right arrow icon ( ). **c.** Click **Save**.

Note: The Not Available For settings override the Available For settings. A user on the Not Available For list for an external link cannot access that external link, even if that user is also on the Available For list for that external link.

Modify the Quick links widget display

Design and manage the appearance of the widget, such as the title, display style, tile size, and content alignment.

Before you begin
Role required: sp_admin or admin

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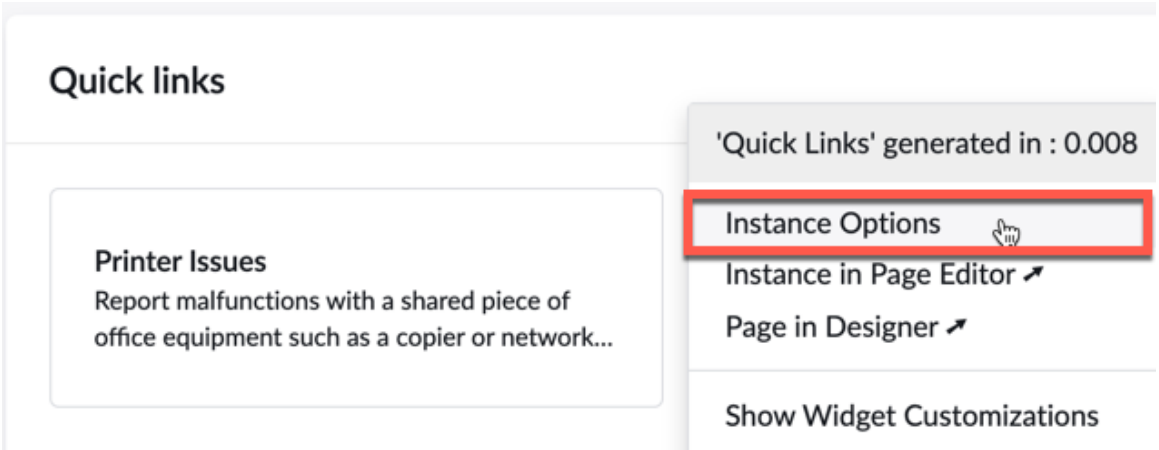
Note: These configuration options are only available for the Quick links widget, not the Quick links (CD) widget. To verify which widget is present in your portal, open the page in the Service Portal Designer Create and edit a page using the Service Portal Designer. For more information on how to configure quick links, see Create a quick link

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. On the Employee Center home page, press and hold the control key, right-click the Quick links widget, and then select **Instance Options**.

Quick links instance options



3. Configure the instance options.

Quick links instance options

Instance option	Description
Title	Indicates the title of the widget.
Card Display Style	Indicates how you want the card tile to appear on the widget. The choices are: ○ **Thumbnail** ○ **Simple** Default value: Thumbnail
Card Tile Size	Indicates the size of the card tile on the widget. The choices are: ○ **Medium** ○ **Small** Default value: Medium
Card Content Alignment	Indicates how you want to align the card content on the widget. The choices are: ○ **Center** ○ **Default** Default value: Default

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Instance option	Description
	Note: When you support Right-to-Left languages, change the value to Right. Alternatively, use the center alignment to avoid issues.
Icon Image Display	Displays the icon image for the card tile. Valid only for: ○ Thumbnail Center Medium Cards ○ Thumbnail Left Medium and Small Cards
Background Image Display	Displays the background image for the card tile. Valid only for Thumbnail Center Medium and Small Cards
Include Description	Option to include description for the card tile. Valid only for: ○ Thumbnail Left Medium Cards ○ Simple Medium Cards
Tile Background Color	Background color of the card tile. The choices are: ○ **Primary** ○ **Dark** ○ **Light** ○ **Accent** ○ **Hexcode** Valid only for thumbnail cards.
Tile Background Color Hexcode	Specify a hex code for the tile background color. Enter a value in this field only if you select **Hexcode** in the **Tile Background Color** field.
Icon Overlay Display	Option to display a circular background for the icon. This option is displayed only when an icon is available.
Icon Overlay Color Hexcode	Option to specify a color for the circular background for the icon. Enter a value in this field after you select the **Icon Overlay Display** option. This field defaults to #FFFFFF (white color) if you do not specify a value in this field.
Text Overlay Display	Option to display the text overlay. Valid only for Thumbnail Center Medium and Small Cards
Text Overlay Color Hexcode	Option to specify a color for the text overlay. Enter a value in this field after you select the **Text Overlay Display** option. This field defaults to #FFFFFF (white color) if you do not specify a value in this field.

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Instance option	Description
Custom Text Color	Indicates custom color for the text. Valid only for thumbnail cards.
Custom Text Color Hexcode	Specify a custom color for the text. Enter a value in this field after you select the **Custom Text Color** option. This field defaults to #FFFFFF (white color) if you do not specify a value in this field.
Quick Links	Add or remove quick links that you want to appear in the widget. By default, you have three Quick Links, however you can add more based on your needs. **Note:** Defer load shows up to six loaders.
Load configuration	Order in which the page and widgets data loads. Select one of the following options: ○ None ○ Asynchronous: First the page loads, then the widgets data loads. Users see content appear in the widgets as soon as each individual widget loads. ○ Synchronous: Page and widget data loads at the same time. The page remains blank until all the data loads.
Show empty state	Option to show the widget with empty state message.

4. Click **Save**.

Related topics

Create a quick link

Employee Center browse experience widgets

Modify the default widget settings according to your organization's needs on Employee Center.

Widgets are containers that display dynamic content from ServiceNow® applications and plug-ins on the Employee Center portal. Employees can use widgets to view company announcements, complete to-dos, access SSO-integrated apps, or navigate to popular topics without leaving the portal. Portal admins can customize the widgets, rearranging their size and order and modifying their display.

Popular topics widget

Popular topics widget lets you quickly view and access the most popular topics. You can configure the instance options to control the appearance of the widget, such as the title, number of topics, display size, and border color.

Before you begin

Role required: sp_admin or admin

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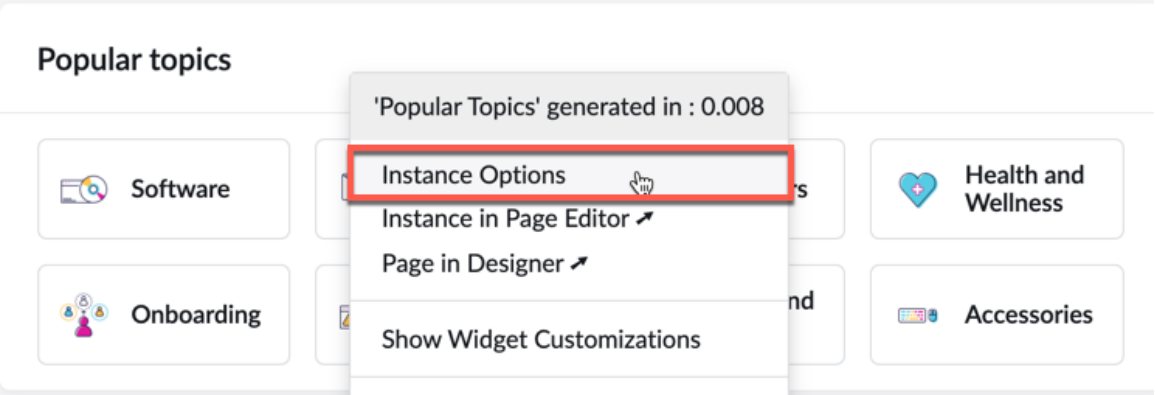
About this task

Employee Center uses an algorithm to determine which topics must appear on the widget.

Note: Retired articles are not considered for topic popularity calculation.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Press and hold the control key, right-click the Popular topics widget, and then select **Instance Options**.



3. Configure the instance options.

Popular topics instance options

Instance option	Description
Title	Title of the widget. For example **Popular topics** for EC **Browse help content** for Kiosk
Number of topics	Number of topics you want to appear on the widget. Default value: 8 For Kiosk, the default value is 6.
Display size	Size of the card tiles on the widget. The choices are: ○ **Normal** (Default for EC) ○ **Small** For Kiosk, the default size is small.
Border color	The border color of the widget. The choices are: ○ **Border-primary** ○ **Border-secondary** ○ **Border-tertiary** ○ **Hexcode**

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Instance option	Description
	Default value: Border-tertiary
Hexcode	Option to specify a hexcode for the border color. Enter a value in this field only if you select **Hexcode** in the **Border color** field.
Show topic icon	Option to show the topic icon. This option is selected by default. You can hide the topic icon by deselecting this option.
Load configuration	Order in which the page and widgets data loads. Select one of the following options: ○ Asynchronous: First the page loads, then the widgets data loads. Users see content appear in the widgets as soon as each individual widget loads. ○ Synchronous: Page and widget data loads at the same time. The page remains blank until all the data loads.
Show empty state	Option to show the widget with empty state message.
Widget behavior during high load	Option to show the view from the available options: ○ None ○ Lite view: Select this option to minimize the load and display a message that the portal is experiencing heavy usage. ○ Regular view: Select this option for regular view.

4. Click **Save**.

Modify the topic header widget display

The topic header widget displays the topic and its child topics, including all the connected content associated with the topics. You can configure the instance options to control the appearance of the topic header widget, such as the topic description and the topic banner and icon.

Before you begin

Role required: sp_admin or admin

About this task

You can configure the topic header widget display using the following steps. To edit the banner image, page header, or description, see Create and associate topics.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Click a topic on the primary navigation bar.
   The topic page is displayed.

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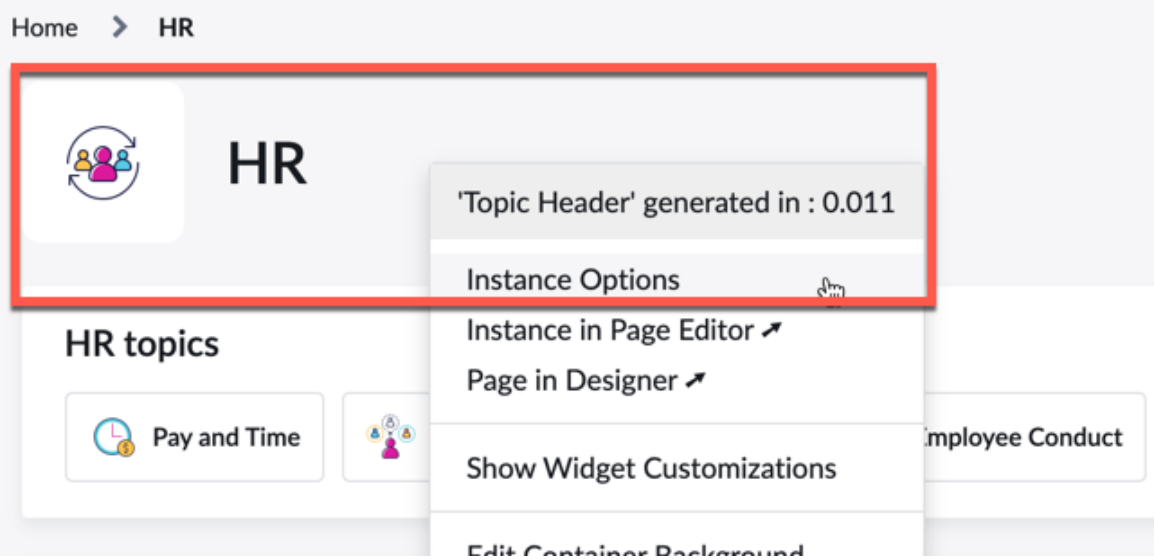
3. Press and hold the control key, right-click the topic widget, and then select **Instance Options**.



4. Configure the instance options.

Instance options for topic header

Instance option	Description
Include Description	Description of the topic. Select this check box to show the description for the topic. This check box is selected by default.
Primary Display	This setting applies to all the topics. The choices are: ○ **Text Only**: Select to display only the topic name. ○ **Icon**: Select to display an icon beside the topic name. ○ **Banner**: Select to display a banner in the background with the topic name. Default value: Icon
Secondary Display	Provides the flexibility to apply this setting only to a select few topics. This setting overrides the primary display setting. The choices are: ○ **Text Only**: Select to display only the topic name. ○ **Icon**: Select to display an icon beside the topic name. ○ **Banner**: Select to display a banner in the background with the topic name. Default value: Banner

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Instance option	Description
Select list of topics	Search for and select the topics to which you want to apply the secondary display setting.
Banner Background Color	Background color for the banner. The choices are: ○ **Brand Primary** ○ **Brand Primary Darker** ○ **Brand Primary Lightest** ○ **Custom, Enter a hex code** Default value: Brand Primary
Banner Background Color Hexcode	Specify a hex code for the banner background color. Enter a value in this field only if you select **Custom, Enter a hex code** in the **Banner Background Color** field.
Banner Image Position	How you want to position the banner in the widget. The choices are: ○ **Left Top** ○ **Left Center** ○ **Left Bottom** ○ **Center Top** ○ **Center Center** ○ **Center Bottom** ○ **Right Top** ○ **Right Center** ○ **Right Bottom** Default value: Center Center
Banner Image Display	The choices are: ○ **Scale to fit**: Scales the image to fit the entire widget. ○ **Original size**: Displays the original image in the widget. Default value: Scale to fit
Banner Text Overlay Color	Overlay color for the banner text. The choices are: ○ **Overlay Dark** ○ **Overlay Light** Default value: Overlay Dark
Banner Text Overlay Opacity	Opacity of the banner text overlay. The choices are:

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Instance option	Description
	○ **0** ○ **0.1** ○ **0.2** ○ **0.3** ○ **0.4** ○ **0.5** ○ **0.6** ○ **0.7** ○ **0.8** ○ **0.9** ○ **1** Select **0** for full transparency and **1** for no transparency. Default value: 0.5
Icon Background Color	Background color for the icon. The choices are: ○ **Background Primary** ○ **Background Secondary** ○ **Background Tertiary** ○ **Custom, Enter a hex code** Default value: Background Primary
Icon Background Color Hexcode	Specify a hex code for the icon background color. Enter a value in this field only if you select **Custom, Enter a hex code** in the **Icon Background Color** field.

5. Click **Save**.

Modify the topic content widget display

The topic content widget displays the knowledge articles and requests associated with the topic in your taxonomy. Click a knowledge article or a request to open it. You can configure the instance options to control the number of items to show per page and their sort order.

Before you begin

Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Click a topic on the primary navigation bar.
   The topic page is displayed.

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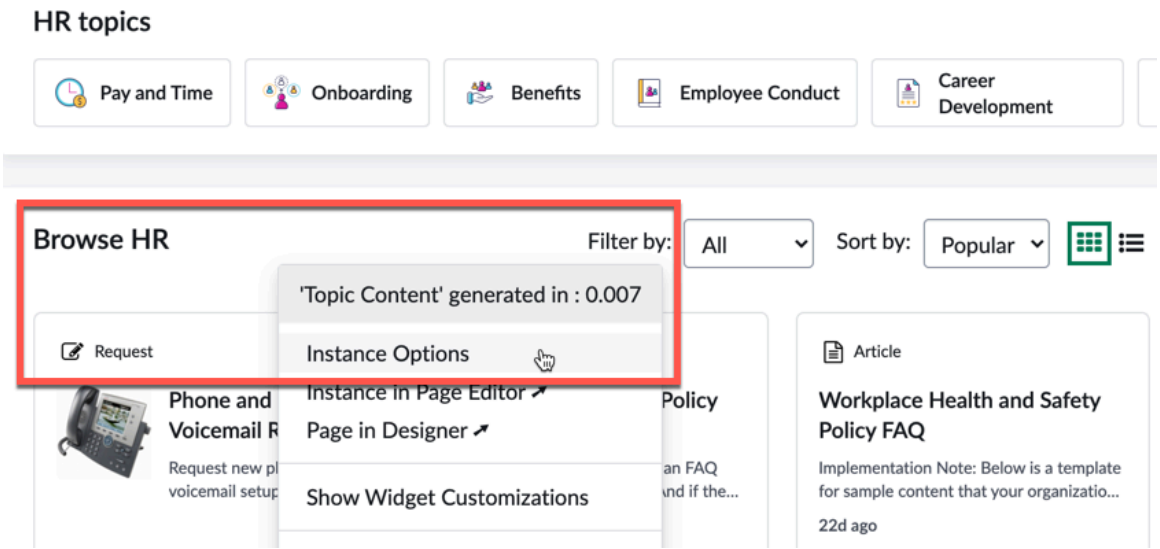
3. Press and hold the control key on the keyboard, right-click the browse topic widget, and then select **Instance Options**.



4. Configure the instance options.

Options

Instance option	Description
Number of items per page	Number of items to show on a single page. The choices are: ○ **12** ○ **24** Default value: 12
Default sort order	Order in which the items are sorted and displayed. The options are: ○ **popularity** ○ **alphabetical** Default value: popularity

5. Click **Save**.

Modify the sub-topics widget display

The sub-topics widget displays all the child topics associated with the parent topic in your taxonomy. Click the child topic to open the page for the child topic. You can configure the instance options to show or hide the topic icons for the child topics in the widget.

Before you begin
Role required: sp_admin or admin

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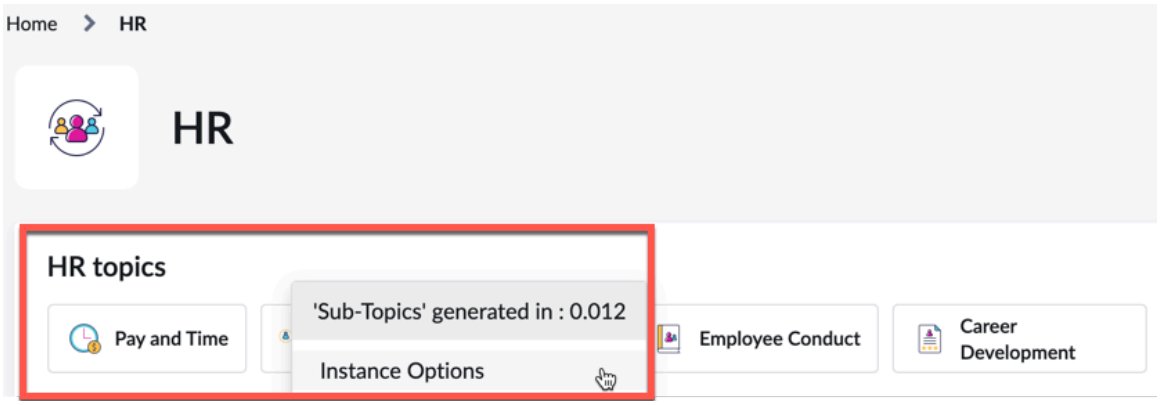
Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Click a topic on the primary navigation bar.
   The topic page is displayed.
3. Press and hold the control key on the keyboard, right-click the child topics widget, and then select **Instance Options**.



4. Do one of the following.
   - Select the **Show Topic Icon** check box to show the topic icon.
   - Deselect the **Show Topic Icon** check box to hide the topic icon.
   This check box is selected by default.
5. Click **Save**.

Setup Employee Center search experience features

Enhance the search experience.

Search experience features

Feature	Description
AI Search for Curated Experiences	Align the AI search to limit the search to the content associated with the taxonomy.
Personalized Answers on Employee Center	Enable employees to quickly find their leave balance.
SharePoint Online Search Connector	Connect the Employee Center with SharePoint to enable employees to search for information resources from the portal.

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Search experience features (continued)

Feature	Description
	Important: Starting with the Yokohama release, SharePoint Online Search Connector is being prepared for future deprecation. It is hidden and no longer activated on new instances but continue to be supported. For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

AI Search for Curated Experiences

Align the AI search to limit the search to the content associated with your taxonomy.

Before you begin

Role required: admin

Deactivate the existing taxonomy so that the search configurations pick up the content from your taxonomy.

About this task

For new customers, the AI search is enabled by default.

Note: AI Search returns additional results based on user roles:

- Users with either the system admin or content admin role can see unpublished content.
- For users with content approver roles, search results might include content for which they are not the audience. However, they cannot view the content unless they are part of the configured audience.
- For users with content admin or content manager roles, search results shouldn't include content (such as news, company events or rich content) in AI search results if they don't meet the scheduled availability window, or for which they are not the configured audience.

Procedure

1. Navigate to **All** > **AI Search** > **Search Experience** > **Search Sources**.
2. Click **ESC Portal Catalogs**.
3. In the **Conditions** field, set the **Taxonomy topic . Taxonomy** filter condition to point to your taxonomy to enable the search to focus on the content associated with your taxonomy.
4. You can modify the other default filter conditions or leave them as-is.
5. Click **Update** to return to the AI search source list.
6. Click **ESC Portal Knowledge Bases**.
7. In the **Conditions** field, set the **Taxonomy topic. Taxonomy** filter condition to point to your taxonomy to enable the search to focus on the content associated with your taxonomy.

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8. You can modify the other default filter conditions or leave them as-is.
9. Click **Update**.

Improved search functionality

The improved global search provides narrowed down content browsing on the global search for quicker and more specific content browsing experience.

The improved global search by topic facets provides filtered data based on its association with the a topic and its sub-topics.

- The supported content types for the search facets include content available on the Unified Browse Widget, like, Service Catalog, Knowledge Base articles, and learning content.
- The topic facets filter content by hierarchy. Select a sub-topic to get specific hierarchical data.
- The base system facet levels available are two. You can add up to 10 levels.

  For more information on adding facet levels, see Configure search by the topic facets.
- The two sort options available on the search are **Most relevant** and **Most recent**.
  - Most relevant is the base system sorting option.
  - Most recent filters the data by date.

Note: You must have the Employee Center 28.0.4 installed along with Utah for the search by the topic facets feature to function.

Configure search by the topic facets

Configure the search by the topic facets, which suits your organizational requirements.

Before you begin

Role required: esc_admin

About this task

The topic facets help filter out content by the hierarchy; topics and sub-topics. You can choose a single or multiple facets to narrow down your search results.
The supported content types for the feature are Service Catalog items, Knowledge Base, and learning content.

The base system facet level support is two. You can add up to 10 levels of facets.

Procedure

1. Navigate to **All** > **AI Search** > **Search Applications** > **ESC Portal Default Search Application**.
2. Go to the **Facets** tab and click **New**.
3. Create a facet with the relevant details according to the topic or sub-topic.

Configure search source when AI search is disabled

In Employee Center, the AI search is enabled by default. In situations where the AI search is disabled, you can configure a search source from which to fetch search results.

Before you begin

Role required: admin

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About this task
The search source configuration limits the search to the content associated with the taxonomy. Employee Center uses the Zing search engine if the AI search is disabled.

Procedure
1. Navigate to **All** > **Service Portal** > **Portals**.
2. Click **Employee Center**.
3. From the **Search Sources** related list, click **New** to add a search source.
4. On the form, fill in the fields.
   For more information, see Define a search source.
5. Click **Submit**.

Enable Now Assist genius results

Enable the Now Assist in AI Search setup to use Now Assist genius results.

Before you begin
Role required: esc_admin

Procedure
1. Navigate to **All** > **Self-Service** > **AI Search** > **Now Assist in AI Search Setup**.
2. Enable the Now Assist Genius Results by selecting the check boxes for each application and select **Save changes**.

Genius results in search profiles

Search profile name	Application name	Now Assist Genius Results
Employee Center Pro Kiosk Search Profile	Employee Center Pro Kiosk	Now Assist Q&A; Now Assist Actions
ESC Portal Default Search Profile	Employee Center	Now Assist Q&A; Now Assist Actions
Service Portal Default Search Profile	Service Portal	Now Assist Q&A; Now Assist Actions
NowMobile Default Search Profile	Now Mobile® Admin - Help center Now Mobile® Admin - Home Now Mobile® - Help center Now Mobile® - Home	Now Assist Q&A; Now Assist Actions

Result
You have enabled Now Assist in AI Search to use the Now Assist genius results functionality.

Personalized Answers on Employee Center

Get personalized Answers about your leave balance within the ServiceNow® system or with an integrated third-party application.

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With this feature, the employees can search for personal, relevant data, using AI- Search to get the Personalized Answers. The search works whether the data resides with ServiceNow® or any other integrated third-party application.

There are two third-party integrations supported for the Personalized Answers- time off, Kronos and Workday.

Kronos is supported in India, China, and North America. Workday is supported in Australia.

The Personalized Answers- time-off integration enables employees to find information about their leave balances.

In addition to searching for leave balances specifically, employees can also search for information such as 'how much sick leave do I have left'.

Set up Personalized Answers for PTO

Set up a third-party-integrated instance to provide employees with Personalized Answers for leave balances on Employee Center.

Before you begin

Role required: esc_admin

About this task

Set up the Personalized Answers, an AI-search enabled feature, for information like leave balance or more on the Employee Center search page.

The default third-party integration for the PTO balance search is Kronos and Workday but you can add your desired integration app for any other information.

Note: Employee Center does not provide Workday-integration by default.

A live query is answered based on an OAuth authentication on the Kronos-integrated instance.

The following plugins are required for the set-up of this feature with Kronos:

- sn_kronos_spoke
- app_ex_integrated_answers
- com.glide.hub.action_step.payload

For more information on ServiceNow® plugins, see List of plugins

Note: app_ex_integrated_answers plugin runs with Employee Center version 26.0.1 and Employee Experience Foundation version 25.0.1. When you install the plugin, it prompts that the appropriate versions of the said applications are going to be installed.

After the plugins are installed, Set up the UKG spoke to register Kronos as an OAuth provider and authenticate requests from ServiceNow®.

After the UKG setup, ensure that the following prerequisites are established, before training and publishing the NLU model:

Note:

1. The application registry, connections, and credentials must be within the Kronos application scope.
2. The **sys_user.list** must have the **Employee number** field in its **Personalized List Columns**. The employee number on the Employee Center portal is synced with the Kronos employee numbers.

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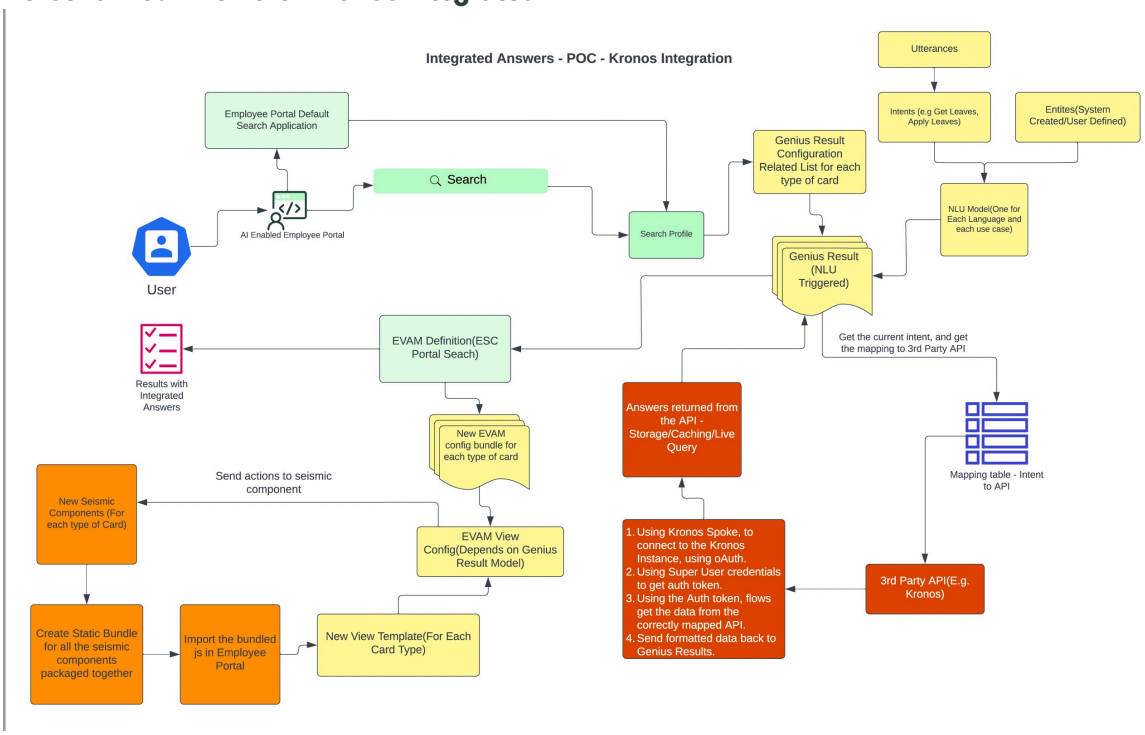
If both the prerequisites are in order, move on to the following procedure:

Procedure

1. Navigate to **All** > **NLU Workbench** > **Models** > **Personalized Answers Leave Model**.
   The **Personalized Answers Leave Model** link should be in Draft state.
2. Select **English**.
3. Select **Intents** on the **Personalized Answers Leave Model** page.
4. Select **Train model** on the top right-hand corner of the page.
5. To view the **Publish your model** widget, after the training is over, go back to the **Personalized Answers Leave Model** page.
6. Select **view phase**.
7. Select **Publish**.

Personalized Answers- Kronos integrated



8. **Optional:** To test the published model, navigate to **All** > **NLU Workbench** > **Models** > **Personalized Answers Leave Model** > **Intents** > **Try model**.

Result

The new genius result card is available on the search result page integrated with the Kronos data.

Use the Personalized Answers on your Kronos-integrated Employee Center portal to seek information on your remaining leave balance.

Note: Admins can review employee search logs in the **sys_search_event** table.

Configure related actions for Personalized Answers

Configure the leave balance-related actions or any other information like payroll, medical benefits. Configure the related actions depending on the data type.

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Before you begin
Role required: esc_admin

About this task
Use the **Personalized Answers** related actions to act on the information found using the Personalized Answers on Employee Center. Set up different third-party integration, different types of information, and configure the action URLs as required.

Procedure
1. Navigate to **All** > **Personalized Answers** > **API Mapping Configuration** > **Get Leave balance**.
2. Make the **View Policy** and **Request for Leaves** functional on the personalized answer page, by configuring **Primary action URL** and **Secondary action URL**.

   Note: The action names **View Policy** and **Request for Leaves** are default features. You can configure the action URLs, as suitable.

3. Enable multi-location support for the third-party integration by selecting the **Multi-location** check box.

   Note: If you want to get the leave balance data for multiple locations, you must select the check box. Otherwise, the data for any one location is considered as default.

Configure the data fetch type

Configure the data fetch type according to your organizational requirement for Personalized Answers- time off on Employee Center.

Before you begin
Role required: esc_admin

About this task
Use any data fetch type, Live Call, AI Search, and Glide Query as required for the Personalized Answers- time off feature on Employee Center.

Procedure
1. Navigate to **All** > **Personalized Answers** > **Third Party Integration**.
2. Select the third-party integration, Kronos or Workday.
3. Choose **Live Call**, **AI Search**, or **Glide Query** according to your organizational need.

   Note: Workday supports **Live Call** if the Workday-integration is already available to you. Employee Center does not provide Workday-integration by default.

4. **Optional:** Navigate to **All** > **System Definition** > **Tables** > **Employee Time off balance** to view the source of the **AI Search** and **Glide Query** data.

Setup Employee Center task management

Enhance employee productivity and drive portal consolidation.

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1. Configure the employee task experience:
   - Employee tasks page
   - Employee requests page
   - My Active items
2. Configure employee information: Employee profile

Action framework

The action framework includes some frequently used action items for quick access. You can use several default actions and create custom actions.

Using the action group framework, you can define these actions that a user can perform in a context.

- Create actions and action groups for ready use as a widget.
- Configure a group of actions that a user can perform.
- Use the default actions and action groups or customize the actions to suit your business needs.
- Manage the display preferences and user criteria.
- Improve employee productivity with access to quick actions.

Here are one-line descriptions about the components in action framework.

- **Action**: A single, defined step or operation within a workflow or process. For example, approve or reject.
- **Action group**: A set of actions for organizing related actions within a flow or subflow. For example, approvals action group has a default **set of actions** Approve and Reject that you can use from the approval page.
- **Action type**: A classification or category that specifies the kind of action to be performed. Type is used for easier identification and use.
- **Action framework**: A structured approach or set of guidelines for organizing and executing actions to achieve specific business goals.

Using actions that are relevant to the user journey, you can complete workflows quickly. For example, you can use the default approve or reject actions to process the requests directly from the approvals page.

Employee Profile action group

Employee Profile action group provides quick access to frequently used action items, such as, viewing the org chart, using email directly or calling. You can edit the default behaviors of the actions to match your requirements.

Approvals experience action group

Approvals experience action group provides quick access to approve or reject the requests directly from the approvals page. You can modify the actions to suit your business requirements.

Manager Hub action group

Manager Hub action group provides quick access to the action items available on the employee cards to view, call, or access email directly on the **Your team** page of the Manager Hub. You can customize the actions to suit your business requirements.

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Configure actions

Using the action framework, configure actions and associate a set of actions as action groups for use in the different contexts.

Before you begin

Role required: sp_admin or sn_hr_sp.esc_admin

About this task

Action items provide quick access to actions that you perform in various contexts. You can modify the actions to suit your business needs. For example, you can use the default approve or reject actions to process the requests directly from the approvals page.

Procedure

1. Navigate to **All** > **Employee Center** > **Action framework** > **Actions**.
2. Click **New** or edit an existing record.
3. On the form, fill in the fields.

Actions form

Field	Description
Action label	Name of the action label that appears on the button.
Action type	Select the action type from the available list.
Active	Check the box to activate the action
Action icon	Icon of the action.
Table	Name of the table to which the action is associated. When a record from this table is open, this list action appears. For approvals, select sysapproval_approver.

4. Click **Save** or **Update**.
5. On the **Action parameters** related list, click **New** or edit an existing record.
6. On the form, fill in the fields.

Action parameters form

Field	Description
Action parameter name	Name of the action parameter.
Parameter type	Select the parameter type from the available list such as JSON, string, or reference.
Is client parameter	Check the box to use the parameters in the client script.
Is display value	Check the box to display the value. By default, the value in sn_ex_sp_action_parameter is set to false and is only visible in form if the parameter type is reference. ○ When true, you get the display value of the field. ○ When false, you get the actual db value of the field.
Action parameter value	This option appears only when you select *`string`*. Parameter value in a string, for example *`approved`*

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Field	Description
Table	Reference table to which this component is tied to. When a record from this table is open, this list action appears. For approvals, select sysapproval_approver. This option appears only when you select *Reference*.
Field	Field from the table that you can select from the element tree such as *Sys ID*. This option appears only when you select *Reference*.
JSON parameter	JSON string you want to specify. For example, *{"param": "value"}*. This option appears only when you select *JSON*.

In the OOTB actions,

- The *isEsignatureEnabled* value is **true** by default, the esignature approval authentication window appears.
- The *broadcastEventName* value broadcasts an event passed in the parameter to hide the buttons when esignature is successful to enable comments before the esignature scenario.

Note: For custom actions, you can customize these two parameters.

7. Select **Save** or **Update**.

Result
Action is configured. You can combine a set of related action items as a group.

Configure action group

Configure a set of related action items as an action group.

Before you begin
Role required: sp_admin or sn_hr_sp.esc_admin

About this task
Action group provides quick access to action items such as approve or reject the requests directly from the approvals page. You can modify the actions to suit your business needs.

Procedure
1. Navigate to **All** > **Employee Center** > **Action framework** > **Action Groups**.
2. Click **New** or edit an existing record such as *Approvals action group*.
3. Edit the **Action group name** or click save or update.
   Proceed to add multiple actions into a group using the Action m2m group table.
4. On the **Action group M2Ms** related list, click new or update an existing record.
   a. Select the **Action** from the available options such as **Approve** or **Reject** or Configure actions.
   b. Edit the **Order** of the action item.
   c. Select **Primary** to set the option as primary.
   d. Select one of the following **Action Visibility** options.

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- Visibility to Self: Visible to owner or self only
- Visibility to Manager: Visible to the manager of the user
- Visibility to all
- Visible to all except Self: Visible to all except self
- User criteria: Select the criterion of the users for whom the action is visible
- Advanced: Define a custom visibility with the Advanced option through a script. For example, `answer = context.state.toString() === 'requested';`

5. Click Save or Update.

Result
Action group is configured to provide quick access to the actions. For example, approvals action group has a default set of actions **Approve** and **Reject** that you can use from the approval page.

Configure action types

Configure action types based on the behavior action as an action type.

Before you begin
Role required: sp_admin or sn_hr_sp.esc_admin

About this task
Action group provides quick access to approve or reject the requests directly from the approvals page. You can modify the actions to suit your business needs.

Procedure
1. Navigate to **All** > **Employee Center** > **Action framework** > **Actions**.
2. Click **New** or edit an existing record.
3. On the **Action type**, search and select an existing record or create a new record.
4. On the form, fill in the fields.

Action types form

Field	Description
Action type name	Name of the action type.
Execute client script before server script	Option to select when the client script needs to be executed before the server script.
Active	Check the box to activate the action type.
Server script	Server scripts run on the server. Scripts are executed in th
Server parameters	Server parameters that are required to execute the function for example `State, sys_id`
Client script	Client scripts run on the client side.
Client parameters	Client parameters that are required to execute the function.

5. Click Save or Update.

Result
Action type is configured. You can associate this **Action type** to Actions.

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Update approvals action group

Approvals action group provides quick access to approve or reject the requests directly from the approvals page.

Before you begin
Role required: sp_admin or sn_hr_sp.esc_admin

About this task
You can use the default set of actions or customize the actions to suit your business needs.

Procedure

1. Navigate to **All** > **Employee Center** > **Action framework** > **Action Groups**.
2. Click **New** or edit an existing *Approvals action group* record.
3. Edit the **Action group name**
4. Click **Save** or **Update**.
   Use the Action group m2m table to add multiple actions into a group.
5. On the **Action group M2Ms** related list, click New or update an existing record.
   a. Select the **Action** item from the available options such as **Approve** or **Reject** or Configure actions.
   b. Edit the **Order** of the action item.
   c. Select **Primary** to set the option as primary.
   d. Select one of the following **Action Visibility** options.
      - Visibility to Self
      - Visibility to Manager
      - Visibility to all
      - Visible to all except Self
      - User criteria: Select the user criterion from the available options.
      - Advanced: Define a custom visibility with the Advanced option through a script. For example, `answer = context.state.toString() === 'requested';`.

      Note: The `context` is the *GlideRecord* parameter for the rendered action. You can modify the parameter as needed.
6. Click **Save** or **Update**.

Result
Approvals action group is configured to perform quick actions such as **Approve** and **Reject** from the approval page.

Modify the Employee Profile action group

The Employee Profile actions include some frequently used action items in a framework for quick access.

Before you begin
Role required: sp_admin or sn_hr_sp.esc_admin

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About this task

The Employee Profile action framework provides quick access to frequently used action items, like, viewing org chart, using email directly from the Employee Profile page or calls. You can edit the actions beyond the default behaviors to match your requirements.

Procedure

1. Navigate to **All** > **Employee Center** > **Action Groups**.
   The default Action Group items available are:
   - View Org Chart
   - Email
   - Call
2. **Optional:** You can reorder and make any of the items **Primary** as **True** or **False** to access that item as a button or have all the options in a list.
3. **Optional:** You can edit the **Order** as priority suits and remove the primary button altogether.
4. **Optional:** You can use the available default **Action Visibility** namely:
   - Visibility to Self
   - Visibility to Manager
   - Visibility to all
   - Visible to all except Self
5. **Optional:** You can also create a specific **User Criteria** who can modify the action, as required, or create a custom visibility with the **Advanced** option.

Result

Use and customize the action framework according to your priority to provide better employee experience with quick accessibility to work email, calls, and other organizational details through the Employee Profile page.

Related topics

Action framework

Browser Extension for Employee Center

Access all your extension-supported, Employee Center content, and other resources within a movable, pop-up browser extension.

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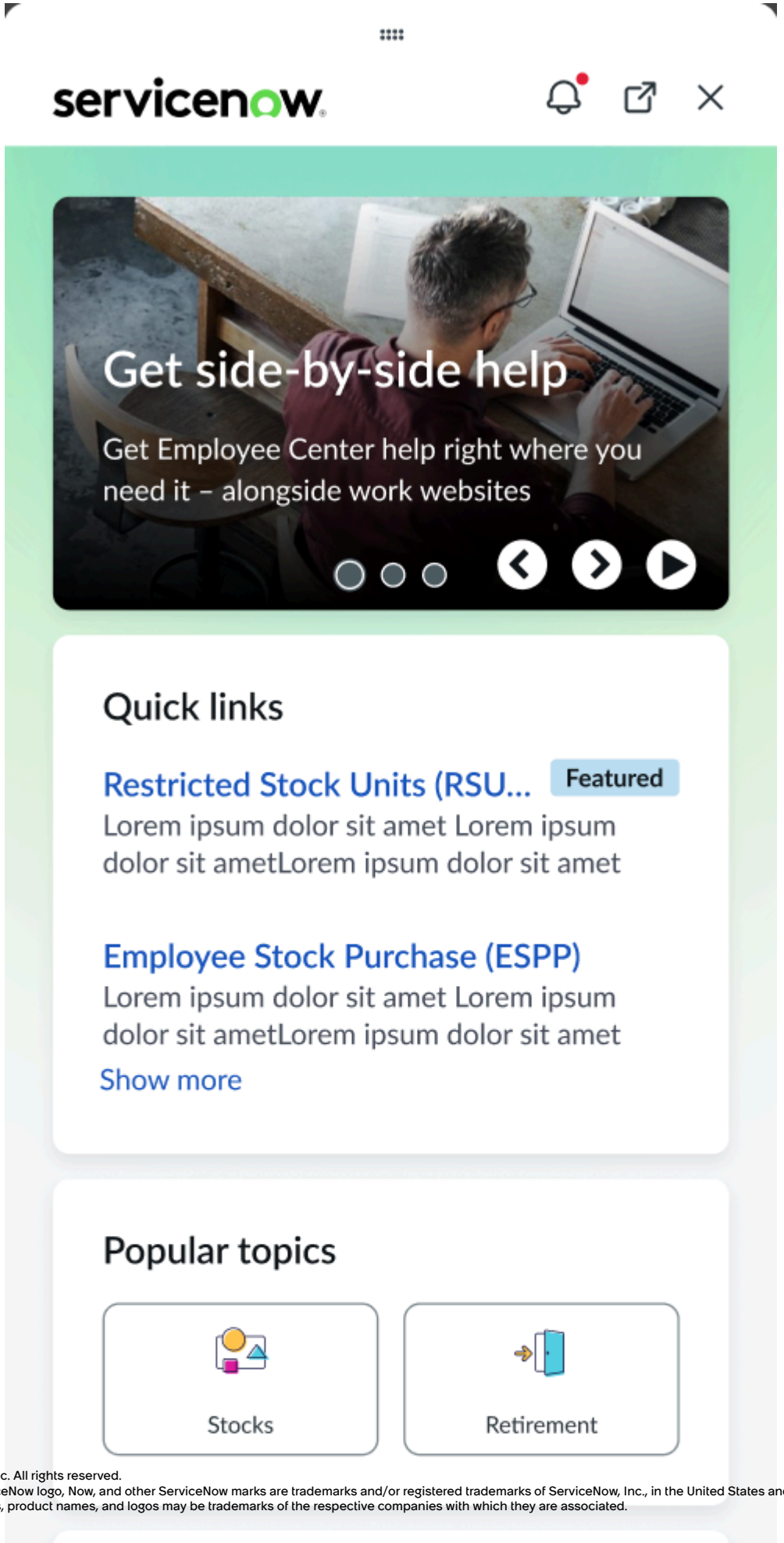
Browser Extension



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Use Google Chrome or Microsoft Edge to use the Browser Extension for Employee Center.

You can access the Browser Extension for Employee Center with the extension icon from the Employee Center portal. You can also open the extension in a new page with the Floating Action Button (FAB) when you're navigating a browser-supported website.

Read a Knowledge Base article, search through your quick links, or submit a Service Catalog item request, all from the Browser Extension for Employee Center.

The following are the types of content configurable on the Browser Extension for Employee Center.

- Employee Communications - View announcements and banners from your portal.
- Quick links - View featured content and access knowledge base articles; see the most-viewed AI-search results for your portal.

  Note:
  - You must have Now Assist Pro+ version along with Employee Center version 38.0 installed to experience the Now Assist full page search within the browser extension.
  - Browser Extension for Employee Center is for enterprise usage. Enterprise admins can enable the extension for different user groups too.

- News - Read portal news in the quick view of the extension.
- Events - View upcoming events in the extension.
- Related applications - Access your applications in the Related apps section.
- Experience feedback - Provide your portal or extension experience feedback on the Browser Extension for Employee Center.

You can customize the theme and styling of your Browser Extension for Employee Center according to your organizational requirement. You can navigate back to the Employee Center portal easily with a link on the extension.

The following roles can operate at different access levels within the Browser Extension for Employee Center application.

Roles

Field	Description
sn_ex_brw_ext.ecbe_admin	Controls the entire administration of the Browser Extension for Employee Center application.
sn_ex_brw_ext.ecbe_manager	Controls content linking, viewer access to the content, and website records for the Browser Extension for Employee Center application.
sn_ex_brw_ext.ecbe_contributor	Controls content linking and viewer access to the content on the Browser Extension for Employee Center application.

Search and notifications

Search and view content or access your notifications on the Browser Extension for Employee Center.

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Access your configured Employee Center content with the omnibox search functionality. You can enter Employee Center or EC in the Google Chrome search bar and press the Tab key to look for content residing within the Employee Center portal.

You can also conduct a context search by selecting a portion of the website content where the extension is enabled. It gives you the search results for the selected section both within the Browser Extension and in the Employee Center portal.

Additionally, you can receive your Employee Center notifications on your Mac or Windows system, as long as you have the Browser Extension open in any one of your tabs. It enables you to track work updates efficiently. For more information, see Notifications in the Browser Extension for Employee Center.

Feedback in Browser Extension

Provide your experience with the Browser Extension for Employee Center with the default feedback configuration and feedback definition available with the Browser Extension for Employee Center plugin (sn_ex_brw_ext) version 1.0. For more information on the experience feedback functionality in the Browser Extension for Employee Center, see Experience feedback for browser extension

Browser Extension interface

You can use the **Instance Options** to modify the display of the extension.

You can configure aspects like the number of options displayed within a widget, the number of search results displayed, and so on.

Leverage the Now Assist search on the Browser Extension for Employee Center. For more information, see Set up Now Assist search in Browser Extension for Employee Center.

Along with the ServiceNow® Store, get the Browser Extension for Employee Center for Google Chrome and Microsoft Edge in the Chrome web store and the Microsoft Edge Add-ons store. For more information, see the helpful resources section.

Helpful resources

Here are some helpful resources:

Chrome web store for the ServiceNow Employee Center Browser Extension

https://chromewebstore.google.com/detail/servicenow-employee-cente/illbompmedmaapkjleambjaffceeemih?authuser=0&hl=en&pli=1

Microsoft Edge Add-ons store for the ServiceNow Employee Center Browser Extension

https://microsoftedge.microsoft.com/addons/detail/servicenow-employee-cente/bddghmmfhfgplnapjkhhhajkcbmfffip

Support

Configure browser extension sites

Configure the Browser Extension for Employee Center in your desired websites for easy access to the Employee Center portal.

Before you begin
Role required: sn_ex_brw_ext.ecbe_admin / sn_ex_brw_ext.ecbe_manager

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About this task

The Browser Extension for Employee Center lets you access your extension-supported Employee Center portal content via the browser extension.

Note:

- If you try to access the browser extension from any random website, without configuring the extension for that website, you see an empty state message.
- If you try to access content when none is configured for the Browser Extension for Employee Center, you see an empty state message.
- When you enable Browser Extension for Employee Center it has a default HTTP response header, which is activated. For optimal user experience, you should have only one HTTP response header activated, at a time, on your portal.

Procedure

1. Navigate to **Employee Center** > **Browser Extension** > **Browser Extension Sites**.
2. Select **New** to create a site that can access the Browser Extension for Employee Center.
3. In the Configured Website form, fill in the fields, and select **Submit**.
   For a description of the field values, see Website configuration form.

Result

You have set up the Browser Extension for Employee Center in your desired website.

Set up browser policies

Set up the browser policies to enable access to the Browser Extension for Employee Center within the supported browsers.

Before you begin

Role required: none

Note: The enterprise administrator must set up the browser policies.

About this task

The Browser Extension for Employee Center can be accessed through Google Chrome and Microsoft Edge browsers.

Note: The administrator is responsible for setting up the browser policies depending on the supported browser in use.

The browser settings and policy page might look different for different browsers.

Procedure

1. Configure the Browser Extension for Employee Center in either of the supported web browsers.
   - For more information on setting up the Browser Extension for Employee Center in Google Chrome, see https://support.google.com/chrome/a/answer/14749672?hl=e.
   - For more information on setting the Browser Extension for Employee Center in Microsoft Edge, see https://learn.microsoft.com/en-us/deployedge/configure-microsoft-edge.

   The following is a sample of the JSON file that you must fill to see the policies on the browser.

```
{
   "Instance" :  "",
```

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```
  "Browser extension portal": "",
  "Employee portal": "",
  "Extension title": "",
  "Extension icon path": "",
  "Enable notifications": false,
  "Enable context menu": false,
  "Open search in browser extension": false,
  "Allowed sites": [],
  "Context menu title for search": "",
  "Context menu title for search in portal": "",
  "Empty State title": "",
  "Empty State Header Logo": ""
}
```


2. In the **ServiceNow Employee Center Browser Extension** policy, fill in the fields.
3. Enter the following field values to set up Browser Extension for your web browser.

Browser extension policy for web browser

Field	Values
Allowed sites	Examples: <concur, workday>
Browser extension portal	ecbe
Context menu title for search	Open search in browser extension
Context menu title for search in portal	Open search in employee portal
Employee portal	esc
Empty state action label	Open Employee Hub
Empty state message	<Empty state message for your organization>
Empty state title	<Visit Employee hub>
Enable context menu	true
Enable notifications	true **Note:** Enable this setting to get Chrome browser notifications along with the notifications in your Browser Extension.
Instance	<servicenow.com>
Open search in browser extension	true **Note:** Enabled this context search option to open it in the Browser Extension.
Open search in Employee Portal	true

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Field	Values
	Note: Enabled this context search option to open it in the Employee Center portal.

If you try to access the Browser Extension from a website where it's not configured, a link takes you back to the Employee Center portal.

Set up Now Assist search in Browser Extension for Employee Center

Set up the Now Assist Virtual Agent search profile on the Browser Extension for Employee Center.

Before you begin

Role required: sn_ex_brw_ext.ecbe_admin

Now Assist Virtual Agent plugin (sn_nowassist_va) version 9.0 must be installed to avail the Now Assist search functionality and the conversational flow in the Browser Extension for Employee Center. For more information, see Display your chat assistant on a portal, channel, or mobile app.

Procedure

1. Navigate to **Conversational Interfaces** > **Assistants**.
2. In the Assistants page, select **Now Assist in Virtual Agent (default)** to open it.
3. In the Now Assist Virtual Agent (default) page, go to **Display experience** to add a portal.
4. Select the **Employee Center Browser Extension** portal and select the check box for the **Allow the search bar to open into a full-page chat experience**.

   Note: The **Allow the search bar to open into a full-page chat experience** check box must be selected to see the Now Assist search bar in the Browser Extension for Employee Center.

   If the check box isn't selected, you only view the Now Assist genius card in the search results. You don't see the Now Assist search bar and the conversational flow in the extension. It only displays the AI Search bar.

Result

You have configured the Now Assist search bar in the Browser Extension for Employee Center.

Enhanced Requests Experience

Improve your request management on Employee Center with the Enhanced Requests Experience that enables you to find and manage requests effectively.

In the Enhanced Requests Experience, requests are segmented by type. You get the **For you** and the **For others** tabs by default with the Enhanced Requests Experience. You can also configure other tabs as the functionality supports multiple tab interface. If the numbers of tabs exceed the screen size a **Show more requests** button displays the rest of the tabs in a list view.

You can edit the default filters **Status** and **Updated** available with the default tabs **For you** and **For others**. You can also configure new filters to the tabs as required. You can associate tabs to filters according to your organizational requirement.

Note: You must be on the Employee Center version 38.0 or later or have upgraded to the Australia release to use the Enhanced Requests Experience.

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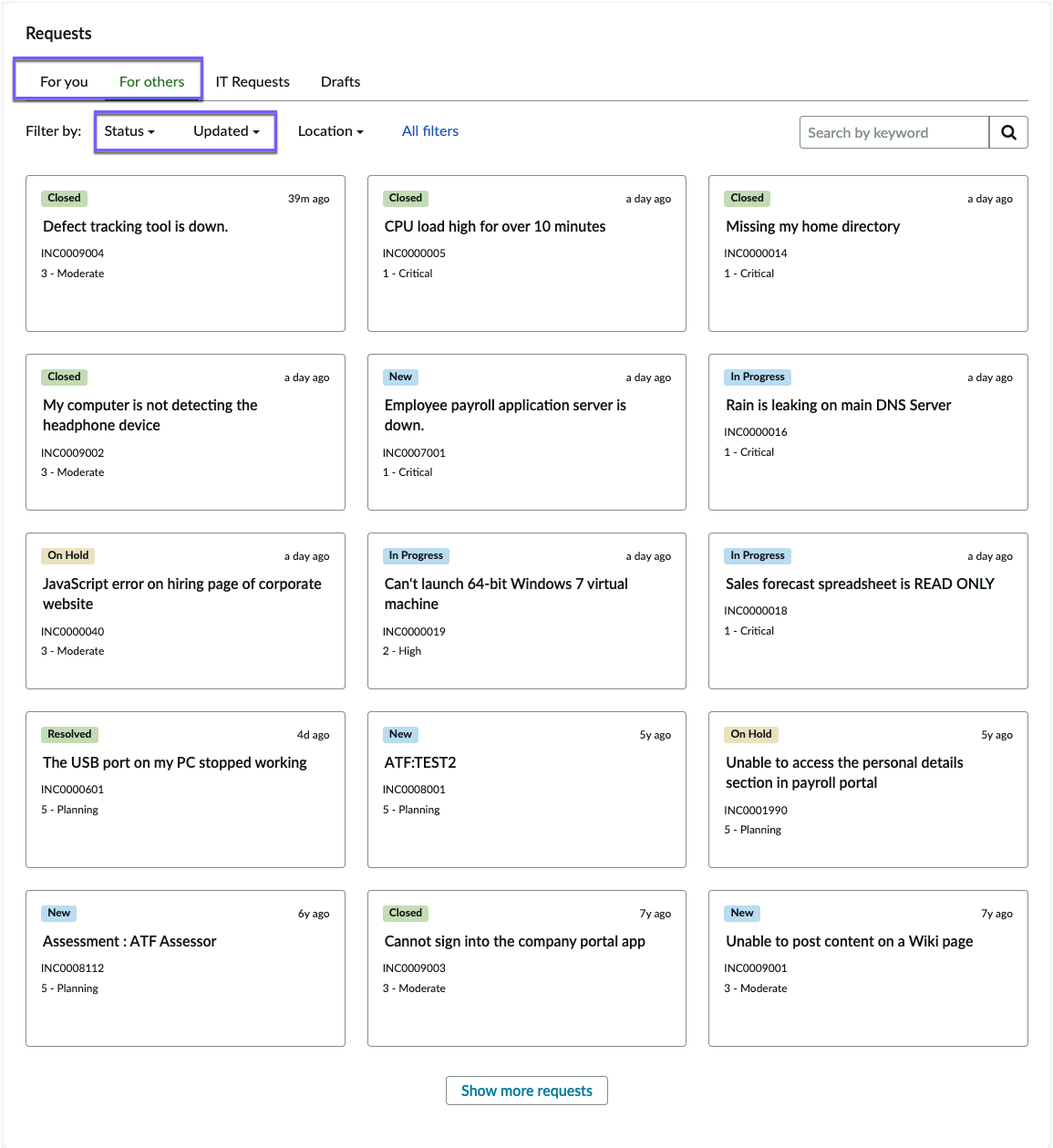
Enhanced Requests Experience



The default number of requests shown on one page is 15. If it exceeds 15, pagination comes into effect.

The Enhanced Requests Experience let's you create a request and keep it in your **Drafts** instead of submitting it instantly. It will sit in the **Drafts** until you're ready for submission.

Drafts is enabled by default. If you want to hide the **Drafts** tab, mark the system property, Enable Save as draft in esc portal (glide.sc.enable.save_as_draft.portal.esc) **false**.

The requests are displayed in a card view by default. You can the view toggle icons next to the search bar to switch between card view and list view. The toggle functionality is only available on Employee Center version 40 onwards.

Enhance the visibility of requests by using the **Filter by** option. You can only have one filtering view for one portal. Filter options can be like **Request Type**, **State**, **Location**, and so on.

The multiple tab interface and the filter options are configurable. For more information, see:

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- Set up request sources
- Set up the Requests filter definition

The **Requests** page is available on responsive view too. The filters are displayed with a **Show more** option when it exceeds the page length.

The Enhanced Requests Experience has improved features for different personas. The experience is scalable, so that admins can create as many tabs as required.

As a manager, you can:

- View requests created by you on behalf of the team.
- View requests created by others for your team.
- View requests created for your own work location, when configured.

As an employee, you can:

- View requests you have created for yourself.
- View requests that are created for you.
- View requests that are created for your work location, when configured.

As an executive assistant, you can view requests that you have created for others.

Enhanced Requests Experience on Now Mobile app

You can get the Enhanced Requests Experience on the Now Mobile app, bringing the full request management capabilities from the Employee Center portal to mobile. Employees can view, search, filter, and manage their requests on the go.

To view the requests on your Now Mobile, you must opt for the mobile experience. For more information, refer to Opt in to the enhanced Enhanced Requests Experience and select the Mobile experience.

To know more about the mobile experience, refer to Enhanced Requests Experience on Now Mobile.

Set up request sources

Create different request sources for different applications to see all your requests under the Requests section on Employee Center.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **Employee Center** > **Requests** > **Source configurations**.
2. Select **New** to create a new request source.
   For existing customers a fix script is shipped with Employee Center version 38.0 to sync data with the request sources and the request filter conditions when you upgrade.
3. On the Request source form, fill in the fields, and select **Submit**.
   For a description of the field values, see Request source form.

Result

You've created a request source for your preferred application.

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Set up the Requests filter definition

Configure a filter definition for different portals or each portal separately with the Requests filter definition.

Before you begin
Role required: sn_hr_sp.esc_admin

About this task
Create a filter definition for the Requests page to have multiple filter support for different tabs. You can also set up each view filter for each of your applications and have a unified request-raising and fulfillment experience.

Procedure

1. Navigate to **Employee Center** > **Requests** > **Filter definitions**.
2. Select **New** to create a filter definition.
   - The **View filter** filter definition along with the **Created for me** and **Created for others** tabs are available with Employee Center version 38.0. The **Other** tab is shipped as inactive. You can use it according to your organizational requirement.
   - You can edit the default filters **Status** and **Updated** available with the default tabs **For you** and **For others**. You can also add new filters to the tabs as required. You can associate tabs to filters according to your organizational requirement. For more information, see the details on the request filter definition form in step 3.
3. On the Request filter definition form, fill in the fields and select **Submit**.
   For a description of the field values, see Request filter definition form.

Result
You have created a filter definition for your Requests view on the portal.

What to do next

1. Set up the Requests filter configuration
2. Set up the Requests filter condition

Set up the Requests filter configuration

Set up the request filter configuration to determine the filter options are available under the Requests tabs.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **Employee Center** > **Requests** > **Filter definitions**.
2. From the Request filter definitions list, select any one where you want to add a filter configuration to open it, like **View filter**.
3. In the filter definition page, go to the Request filter configuration section, and select **New**.

   You can edit the default filters **Status** and **Updated** available with the default tabs **For you** and **For others**. You can also add new filters to the tabs as required. In the Associated tabs sections, you can associate tabs to filters according to your organizational requirement. For more information, see the details on the request filter configuration form in Step 4.

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4. On the New filter configuration form, fill in the fields, and select **Submit**.
   For a description of the field values, see Request filter configuration form.

What to do next
Set up the Requests filter condition

Set up the Requests filter condition

Set up the filter conditions to provide a second-level filter options for the first-level filters.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **Employee Center** > **Requests** > **Filter definitions**.
2. From the Request filter definitions list, select the required definition to open it.
3. In the filter definition page, go to the Request filter configuration section, and select the required one, like **Created for you**.
4. In the filter configuration page, go to the Request filter conditions section, and select **New** to create a filter condition.
5. On the Request filter conditions form, fill in the fields, and select **Submit**.
   For a description of the field values, see Request filter condition form.

Opt in to the enhanced Enhanced Requests Experience

Opt in to the Enhanced Requests Experience, as an existing customer, to get the benefits of the updated features on both desktop and on the Now Mobile app.

About this task
You can get the Enhanced Requests Experience on both your desktop and on the Now Mobile app. At anytime, you can track the requests created for you, by you and in the draft states on the go.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **Employee Center** > **Requests** > **Set up enhanced request experience**.
2. To opt for the Enhanced Requests Experience on your desktop, do the following:

   a. In the Desktop experience, review the requirements and select the **I reviewed the requirements..... ready to opt in.** check box.

   b. Select **Opt in for desktop**.
      You are opted to desktop experience.

3. To opt for the Enhanced Requests Experience on your Now Mobile app, do the following:

   a. In the Mobile experience, review the procedure and select **Configure screen record**.

   b. On the form, in the **Screen** field, change field to **Enhanced request experience**.

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c. Save the form.
You are opted to mobile experience. To view the requests on your mobile, refer to Enhanced Requests Experience on Now Mobile.

Result
You have opted in to the Enhanced Requests Experience.

Employee requests page

The requests page is where employees can view all their requests on a single page in the Employee Center. You can configure the requests page by applying filters to show a user's service catalog requests, IT incidents, HR cases, and more.

Overview of the requests page

The requests page displays all of an employee's requests. The following GIF shows an example of an employee viewing and opening requests on the requests page.

Note: Leverage the Enhanced Requests Experience to get more flexibility of configuration and requests management on Employee Center. For more information, see Enhanced Requests Experience.

Configuring the requests page

You control the type of requests that appear by configuring the request filters. The filters define the table and conditions that a request must meet for it to appear on the requests page for an employee. For example, you can configure a Service Catalog Request filter by associating it with the Request [sc_request] table with the conditions that the request is active and that the request was opened by or for the employee.

Note: If you are using Employee Center as part of HR Service Delivery, HR cases appear on the requests page for the user that the case was opened for. If an HR case has one or more child cases, the child cases are automatically rolled up with the parent case up to three generations (children, grand-children, and great-grand-children). Furthermore:

- HR child cases that are rolled up with the parent do not appear as separate requests on the requests page.
- Non-HR child cases (such as IT or service catalog requests) appear both as a separate request and as part of the roll-up on the parent case.

To learn more, including how to configure the view for the subject person of an HR case, see Use HR Case Management.

Preconfigured filters

The following filters are included with the Employee Center application. You can use them or configure your own.

Filters by application

Application	Filters
Employee Center	• Incident Portal • Service Catalog Request

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Filters by application (continued)

Application	Filters
	• Service Catalog Request Portal • Service Order Portal
With HR Service Delivery	• HR-My Requests • HR Cases Closed • HR Cases Open • HR Service Request Closed • HR Service Request Open

Create or modify a request filter

Create or modify a request filter for the requests page in the Employee Center.

Before you begin

Role required: sn_hr_sp.esc_admin

Each request filter is associated with a table that is an extension of the Task [task] table. You can use a condition builder to specify the conditions that a request must meet for it to appear on the user's requests page. You can also associate the request filter with a ticket page.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Administration** > **My Request Filter**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

My Request Filter form

Field	Description
Short Description	Description of the request filter.
Table Name	Name of the table that the request filter is associated with. **Note:** The table must be an extension of the Task [task] table.
Active	Check box to activate the request filter for use.
Applies to	Select one of the following: ○ Desktop ○ Service Portal ○ Desktop/Service Portal ○ Mobile
Filter	Conditions that a request must meet to appear on the requests page in the Employee Center.

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Field	Description
	When defining conditions like case sensitivity or null values, see APIGlideFilter - Scoped, Global . **Note:** The conditions available to use are dependent on the table you select.
Portal page	Ticket page that the request filter is associated with.

4. Click **Submit** or **Update**.

My active items widget configuration

The My active items widget displays all user activity that requires your input or review.

In the My active items widget, tasks, surveys, and request activities are available by default in the Employee Center. The Tasks activity is set to primary by default. Task activities are displayed using the existing to-do configuration and the Requests activities are displayed using the existing request filters.

Note: You can add additional configurations to display your activities. For example, to display activities for reservations, you must install and activate the plugin for the ServiceNow® Workplace Reservation Management application.

From **My Active Items** widget, admins can perform the following actions.

- Organize items based on priority or urgency.
- View the items in vertical or horizontal layouts.
- Perform actions on the assigned tasks from **My Active Items**.

My active items actions

You can now configure action framework to allow employees to perform actions from the My active items.

Configure **Action group** for the primary activity to complete suitable actions. For tasks, the approve and reject actions are available out-of-the-box. For more information, see Enable task configuration for approvals

Note: When you do not associate an action group with the tasks, the **View details** option appears to navigate to the activity details page.

My Active Items Widget Layout Guidance

The My Active Items widget is designed for optimal display and usability when configured using a column size of 3 or greater. This layout ensures that information presented within the widget remains readable and visually consistent across Employee Center topics.

Note: The My Active Items widget does not support column sizes less than 3. If you use a column size below 3, the widget is not guaranteed to display correctly for all screen widths. Currently, there are no plans to improve support for smaller column sizes. We suggest you use a column size of 3 or higher moving forward.

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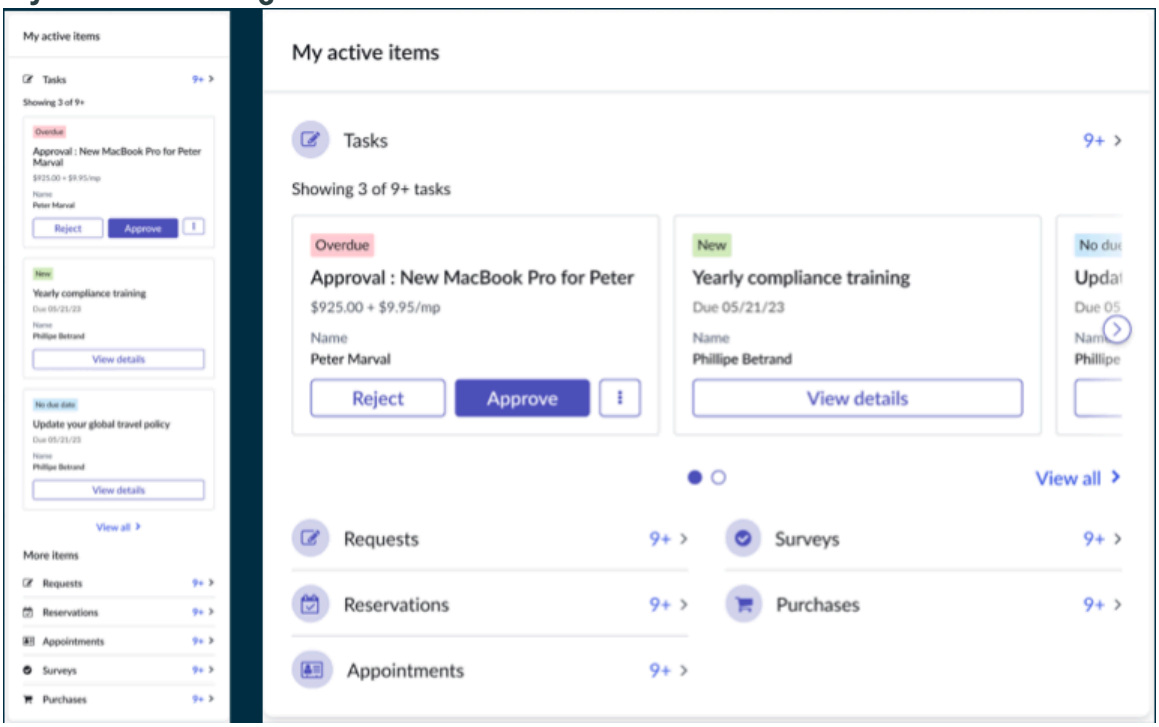
My active items widget items



To change the display options, see Perform an advanced activity configuration.

Summary view

The summary view displays a count of all the activities. The count for the primary activity is shown at the top of the widget. The count for the non-primary activities is shown after that. For example, tasks (9 Tasks) is the primary activity and requests (9+ Requests) is the non-primary activity. If the number of activities is zero, the summary view displays **0** next to the activity name. For example, if there are zero tasks, then the summary view displays 0 Tasks. If the count of tasks exceeds 9 in number, the summary view displays 9+ next to the activity name. For example, If there are 10 tasks, then the summary view displays 9+ Tasks.

Clicking an activity in the widget opens the page that you specified in the **Internal Link** field of the Activity Configuration form.

List view

The list view displays a list of to-dos only for the primary activity. If you set the Tasks activity as primary, the list view displays to-dos only for the Tasks activity. The **View All** option opens the page you have configured for the primary activity.

You can do an advanced configuration or a basic configuration for an activity. Use the out-of-the-box **Approvals action group** to display the actions such as **Approve** and **Reject**.

Note: When you do not associate an action group with the tasks, the **View details** option appears to navigate to the activity details page.

For more information, see Action framework.

Note: For actions to appear in my items widget, you can add the OOTB **Approvals action group** from **All** > **Employee Center** > **Administration** > **To-dos Configurations**, click an existing to-dos configuration, navigate to the **To-do Configuration Details** record, and use the OOTB action group under **Fields Mapping**.

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Related topics

Perform a basic activity configuration

Perform an advanced activity configuration

Perform a basic activity configuration

Configure activities to determine which records you want to retrieve from a table when certain conditions are met.

Before you begin
Role required: admin, sp_admin, or ESC admin

Procedure

1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Activity Configuration form.
4. Click **Save** or **Submit**.

What to do next
If you click **Save**, the **Activity Configuration Details** tab appears. Provide details for a basic activity configuration.

Provide details for a advanced activity configuration. For more information, see Perform an advanced activity configuration.

If you click **Save**, the **Activity Configuration Details** and **Activity Access** tabs appear.Restrict access to an activity. For more information, see Restrict access to an activity.

Provide basic activity configuration details

After you create a basic activity configuration, you must specify which records for the activity you want to retrieve from the tables.

Before you begin
Role required: admin, sp_admin, or ESC admin

Procedure

1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
2. The Activity Configurations module displays the list of existing activity configurations.
3. Click the basic activity configuration to provide configuration details.
4. Click the **Activity Configurations Details** tab.
5. Click **New**.
6. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Activity Configuration Detail form.
7. Click **Submit**.

Perform an advanced activity configuration

Configure activities to display their count and to display items in a list for a primary activity.

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Before you begin
Role required: admin, sp_admin, or ESC admin

Procedure
1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Activity Configuration form.
4. Select the **Advanced** option.
5. In the **Summary view script** field, add a script to display the count of activities, for example, `new sn_ex_sp.ActivityConfigurationUtil().getTasksCount();`
   The API returns an integer value.
6. In the **List View script** field, add a script to display items in a list, for example, `new sn_ex_sp.ActivityConfigurationUtil().getMyTodos(recordsLimit);`

   Note: Do this step only if you have marked this activity as primary by selecting the **primary** option.

7. On **List view json**, provide a template with mapping of table fields to component properties.
   For example, `{ 'badge': '', 'badgeColor': '', 'image': '', 'title': '', 'description': '', 'field1Label': '', 'field1Value': '', 'field2Label': '', 'field2Value': '', 'itemUrl': '', 'target': '' // target is '' if its internal or portal page url. target is '_blank' if url is external }`
8. Click **Save** or **Submit**.

What to do next
If you click **Save**, the **Activity Access** tab appears. For more information, see Restrict access to an activity.

Restrict access to an activity

Apply user criteria to an activity to define which users, groups, and roles can access the activity.

Before you begin
Role required: admin

About this task
In the My active items widget, the activity that a user does not have access to is not displayed for that user.

Procedure
1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
   The Activity Configurations module displays the list of existing activity configurations.
2. Click the activity configuration that you want to restrict access to.
3. Click the **Activity Access** tab.

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To	Do this
Add a new user criteria	**a.** Click **New**. **b.** On the form, fill in the fields. For more information about the form fields and descriptions, see User Criteria form. **c.** Click **Submit**.
Edit an existing user criteria	**a.** Click **Edit**. **b.** On the Edit Members form, select the required roles, users, and groups from the Collection column and move them to the Activity Access List column by clicking the right arrow icon ( ). **c.** Click **Save**.

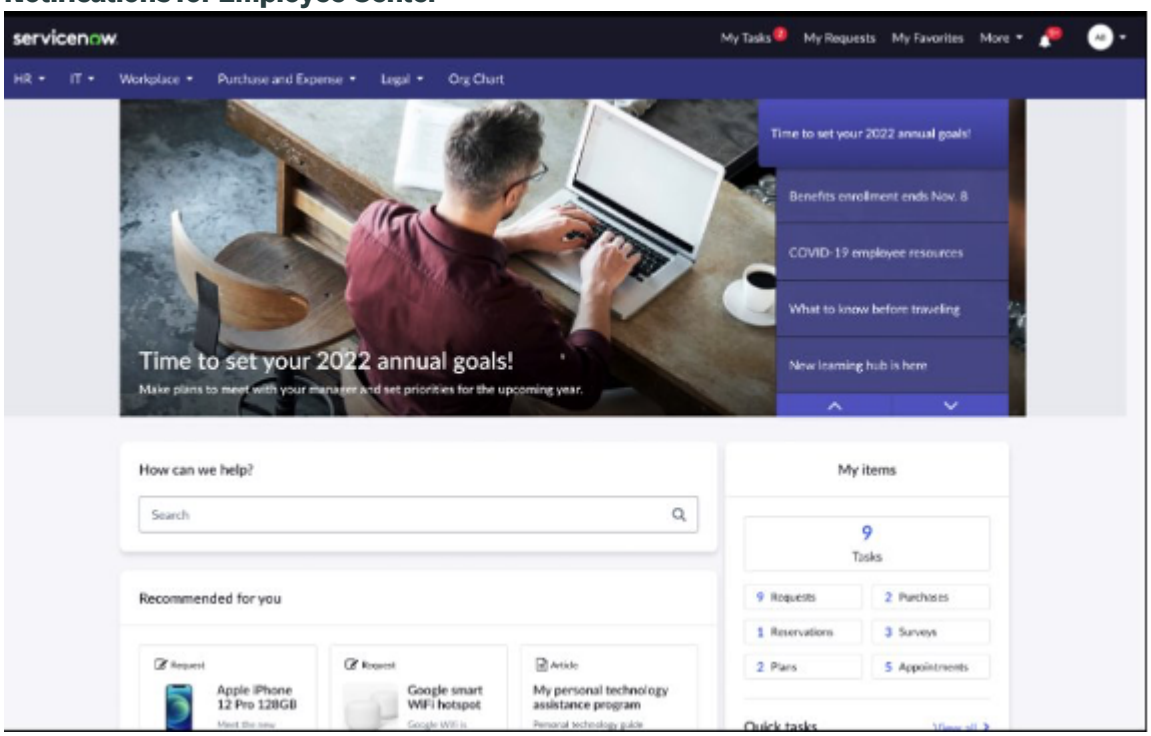
Notifications for Employee Center

Notifications for Employee Center functionality provides a unified notifications experience on the portal for different tasks, activities, and other relevant information.

Notifications for Employee Center functionality is available when you have the Employee Center plugin (sn_ex_sp) version 36.0, the Notifications for Employee Center plugin (sn_ex_sp_notifs), and the Yokohama release version installed.

Note: Installation of the Notifications for Employee Center plugin (sn_ex_sp_notifs) is required to avail the functionality.

Notifications for Employee Center



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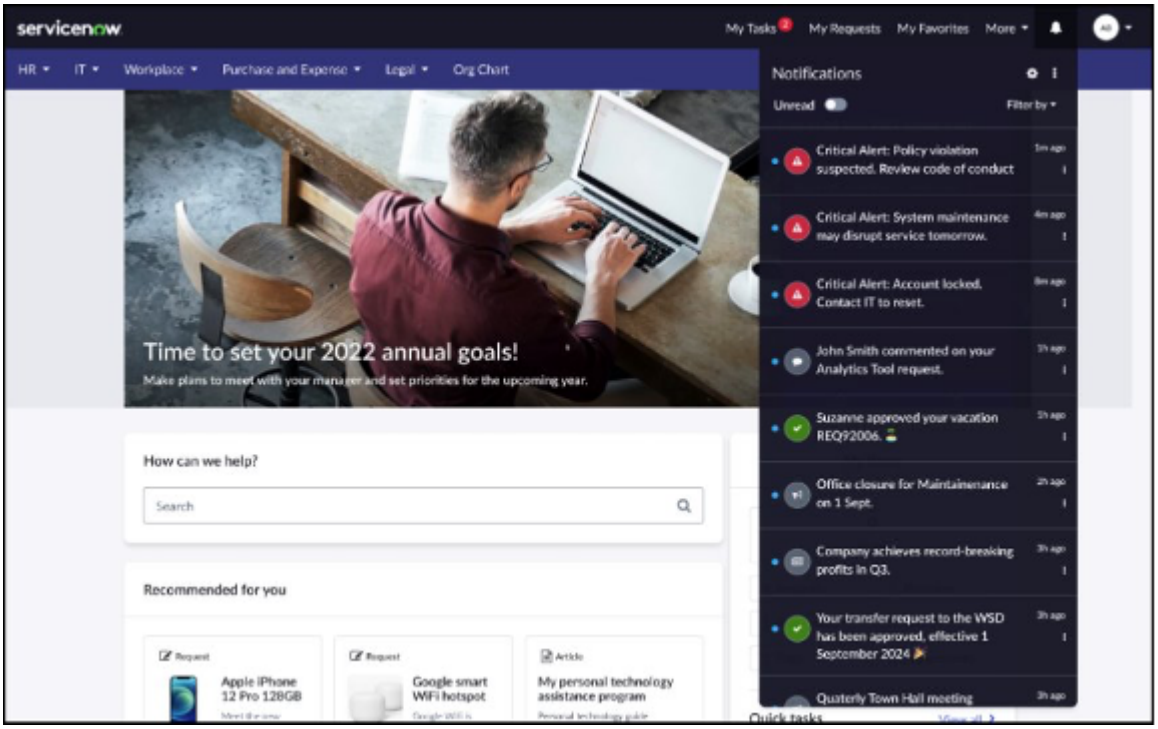
Notifications list



Notifications for Employee Center functionality is configurable for other portals too, like the Employee Center Pro Kiosk.

Note: Notifications for Employee Center isn't configurable on Now Mobile®.

With notifications for Employee Center, you can:

- Get default and configurable portal notification content.
- Get read or unread and seen or unseen indicators.
- Mark notifications critical to attract attention.
- Group notifications while delivering multiple notifications at the same time.

With the notifications header option, you can:

- Get a bell icon on the portal header for tracking.
- Get notification count displayed on the bell icon.
- Turn on or off the display of the notification count.

Turn off notifications altogether, if it isn't relevant for you.

Notifications actions

Use Notifications filters to refine your search when you have a long list. The filters are configurable according to your requirements. The following are the default options:

- Critical
- Reminder

Mark all your notifications read altogether with the **Mark all as read** option available on the global utility ellipses option.

Notifications actions available for each notification are:

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- Mark As Read
- Remind me
  - In 30 mins
  - In 1 hour
  - Next week
- Clear notification

For more information on configuring notifications, see Configure notifications for portal.

Notifications in Content engagement for Employee Center Pro

There are two predefined notifications available with Content engagement for Employee Center Pro version 1.3.

- **Notify author if news has a reaction**: The author of a news article is notified when someone reacts to a published news article. The notifications are grouped together, if multiple reactions are received.
- **Notify author if news has a comment**: The author of a news article is notified when someone comments on their published news article. The notifications are grouped together, if multiple comments are received.

If the author clicks on a news article notification for an expired article, it won't be visible anymore.

Notifications in the Browser Extension for Employee Center

Get Notifications for Employee Center in the Browser Extension for Employee Center.

You must have the Browser Extension for Employee Center plugin (sn_ex_brw_ext) version 1.0 installed to get the default Notifications configuration **ECBE configuration**.

The **Display mode** available for the **ECBE configuration** is only **Page view**. For more information on Notifications configuration for your portal, see Configure notifications for portal.

For more information on the field values in the portal notification configuration form, see Portal notification configuration form.

Configure notifications for portal

Configure the notifications functionality on any portal of your choice to get a unified notification system for all your tasks and reminders.

Before you begin

Role required: notification_provider_admin

Procedure

1. Navigate to **Employee Center** > **Portal Notifications** > **Notification Configurations**.
   If you have upgraded to the Employee Center plugin (sn_ex_sp) version 36.0 along with the Notifications for Employee Center plugin (sn_ex_sp_notifs), and the Australia release version, you see the **Employee center configuration** by default in your Notification Configurations.
2. Select **New** to set up notifications for any other preferred portal.
3. On the Portal notification configuration form, fill in the fields.
   For a description of the field values, see Portal notification configuration form.

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You can also configure the notification content and the trigger conditions for each notification type. For more information, see Configure notification content for portal and Configure notification triggers.

4. Select **Submit**.

Result
You have configured the notifications for Employee Center functionality on your portal.

Configure notification content for portal

Configure the notification display messages for each notification type on the Employee Center portal.

Before you begin
Role required: notification_provider_admin

Procedure

1. Navigate to **Employee Center** > **Portal Notifications** > **Notification Content Configurations**.
2. Select **New Provider Content** and select **Portal Content** to create portal notification content. The options available are as follows.
   - **Portal Content**
   - **Virtual Agent Content - Chat**
   - **Virtual Agent Content - Messaging**
   - **Workspace**
   - **Next Experience**

   For more information on setting up different types of notification content, see Provider notifications.
3. On the Portal notification content form, fill in the fields and select **Submit**. For a description of the field values, see Portal notification content form.

Result
You have configured the notification content for your portal.

Configure notification triggers

Configure the notification content triggers to determine how it's displayed on the portal.

Before you begin
Role required: notification_provider_admin

Procedure

1. Navigate to **Employee Center** > **Portal Notifications** > **Portal Notifications**.
2. In the Notifications list, select the notification where you want to set the trigger.
3. On the Notifications trigger conditions form, fill in the fields, and select **Submit**. For a description of the field values, see Trigger conditions form.

Employee tasks page

Configure the tasks page for employees to view and complete all their tasks on a single page. You can configure the page by applying filters to show user approvals, content tasks, and more.

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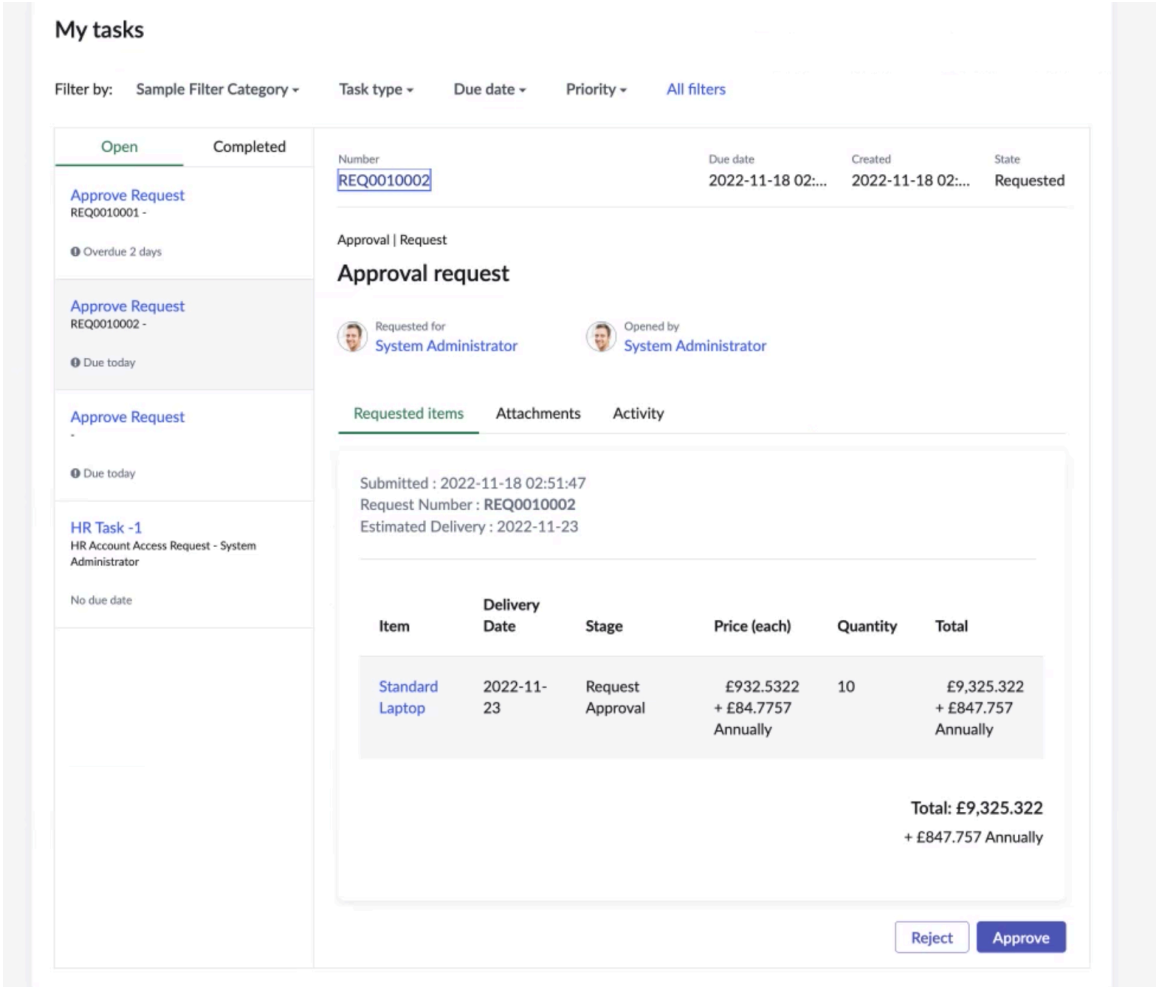
My tasks overview

The My tasks page shows all open and completed tasks for an employee.

My tasks



Configure the tasks page

You control the type of open and completed tasks that appear by configuring the filters. The filters define the table and conditions that a task must meet for it to appear on the tasks page for an employee. You can associate one filter per table. For example, you can configure an Approvals filter by:

- Associating it with the Approval [sysapproval_approver] table with the conditions that the employee is the approver.
- There is an entity that the approval is for.
- The approval is in the requested state.

Note: The default order is due date. If you have too many filters and find that performance is affected, you can order the tasks by filter. To order by filter, you must enable filter prioritization and assign priority numbers for each filter.

For more information, see Enable task configuration for approvals.

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Configure Ask a question

Ask a question is a widget that establishes a communication link between a user with an HR Agent or queue to discuss HR tasks or cases. These configurations determine which HR agent or queue to use for communication. For HR tasks, the **Task support team** field defines the HR agent or queue that picks up any communication about the task when a user selects the Ask a question link. To use this option, activate the Connect Service Portal Widgets (com.glide.connect.sp_widgets) plugin.

Note: For more information about **Connect**, see Connect.

For HR cases, define configuration under **Conversational Interfaces**.

Note: For more information about **Conversational Interfaces**, see Conversational Interfaces and Setting up Agent Chat.

If your company is not using Connect Support, you can choose to hide the **Ask a question** link. To hide the Ask a question link, go to **sys_properties.list** and find the **sn_hr_sp.hr_ask_a_question_enabled** property. Default value is **true**. To hide the Ask a Question on HR cases and tasks on the Employee Center, change the setting to **false**. For HR tasks, when Agent Workspace is selected in the **Task support team** drop-down, Virtual Agent is used. If Users and groups is selected, Connect Support is used. For more information, see Adding an HR task to an HR case.

Advanced Work Assignment To configure Advanced Work Assignment (AWA) for Agent Workspace, see Advanced Work Assignment (AWA) for HR Service Delivery.

Preconfigured filters

The following filters are included with the Employee Center application. You can use them or configure your own.

For more information, see Task filters on My tasks

Employee to-dos approval roles

Roles determine who can approve, reject, or comment on employee requests.

Use the following roles to define how employee requests on the Employee to-dos page are handled:

To-do roles

Role title [name]	Description	Contains roles
approver_user	Required role for Approver users. Approver users can modify requests for approval routed to them. They also have all capabilities of Requesters. Note there is a fee associated with this role. Do not assign it to users without confirming your organization has the appropriate entitlement.	None
sn_request_read	Provides read access to the Request Management Application and related	None

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To-do roles (continued)

Role title [name]	Description	Contains roles
	functions (It does not check for approving records). Can read REQs and RITMS.	
sn_request_approver_read	Provides read access to the Request Management Application and related functions (allows access only if user has an approving record for the request record). User with this role can read approvals.	None
sn_request_write	Provides write access to the Request Management Application and related functions. User with this role can comment on requests.	• task_editor • sn_request_read • dependency_views • agent_workspace_user • view_changer • cmdb_read • sn_request_approver_read
sn_hr_core.case_reader	Provides access and ability to read all HR cases.	None

Create or modify to-dos

Create or modify a to-dos in the Employee Center.

Before you begin

Role required: sn_hr_sp.esc_admin

You can use a condition builder to specify the conditions that a task must meet for it to appear on the user to-dos page. You can also define the appearance of the to-dos configuration header. You can associate both task and non-task tables in to-do configuration.

Procedure

1. Navigate to **All** > **Employee Center** > **Administration** > **To-dos Configuration**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

To-dos Configuration form

Field	Description
Name	Name of the to-dos configuration filter.

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Field	Description
Table	Name of the table that the to-dos configuration is associated with. **Note:** ○ You can associate one filter per table. ○ The table must be an extension of the Task [task] table.
Tab	The tab where you want the to-dos to appear.
Conditions	Conditions that a task must meet to appear on the to-dos page in the Employee Center.The conditions available to use are dependent on the table you select. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Active	Check box to activate the to-dos configuration for use.
Applies to	Indicates the service portal the to-dos configuration applies to.

4. Select **Save**.
   The **Title row** and **Detail row** tabs appear.
5. In the **Title row** tab, configure the title row of the to-dos configuration header.

Title form

Field	Description
Title type	Indicates what the title type applies to. The choices are: ○ Fields: Uses a field from the table you selected for the title. ○ Custom: Provide custom text to appear as the to-dos configuration title.
Title field	Appears when you select **Fields** from the **Title type** list. Map a field from the table you selected to appear as the to-dos configuration title.
Custom title	Appears when you select **Custom** from the **Title type** list. Enter text you want to appear for the title.

6. In the **Detail row** tab, configure the details row of the to-dos configuration header.

Details form

Field	Description
Detail type	Indicates the type of detail you want to appear in the to-dos.

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Field	Description
	○ Custom: Indicates custom text appears as the to-dos configuration details. ○ Parent fields: Select a parent table, and then map one or more fields from that table to appear as the to-dos configuration details. The fields will be separated by a hyphen. **Note:** To display a link to the parent ticket page, make sure that the **Link to parent** check box is selected. ○ Fields: Map one or more fields from the associated table to appear as the to-dos configuration details. The fields will be separated by a hyphen. **Note:** To display a link to the corresponding ticket page, make sure that the **Link to task** check box is selected.
Custom detail	Enter custom text you want to appear in the to-dos list. Only appears when you select **Custom** from the **Detail type** list.
Parent table	The table you want to use to select fields from in the detail row of your to-dos. Only appears when you select **Parent fields** from the **Detail type** list.
Parent fields	The fields you want to appear in the detail row of your to-dos. The fields you choose are based on the table you selected. Only appears when you select **Parent fields** from the **Detail type** list.
Link to parent	Indicates you want a link that opens the parent task to appear on the ticket page. Only appears when you select **Parent fields** from the **Detail type** list.
Detail fields	Indicates the fields you want to appear as the to-dos configuration details. If you select multiple fields, they are separated by a hyphen. Only appears when you select **Fields** from the **Detail type** list.
Link to task	Indicates you want a link to appear that prompts the user to select to open a task on the ticket page. **Note:** Link to task works only when the table extends the task table.

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Field	Description
	Only appears when you select **Fields** from the **Detail type** list.

7. In the **To-dos Widget Mappings** list, you can map the filter to one or more custom to-dos widgets.

   Note: If no widget mapping is provided, a default to-dos widget is used.

   a. Click **New** or open a record.

   b. Fill in the fields on the form.

   To-dos Widget Mapping form

Field	Description
To-dos Configuration	This field is automatically set to the to-dos configuration that the widget mapping is associated with.
Table	This field is automatically set to the table that the to-dos configuration is associated with.
Conditions	Conditions that a to-do must meet for it to display with the widget. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Active	Check box to activate the widget mapping for use.
Widget	Name of the widget that the to-dos configuration is associated with. **Note:** To learn more about widgets and how to configure them, see Service Portal widgets

   c. Click **Submit** or **Update**.

8. In the **To-dos Configuration Detail** list, you can map the source table fields based on the defined conditions.

   a. Click **New** or open an existing record.

   b. On the form, fill or modify the fields.

   To-dos Configuration Detail form

Field	Description
To-dos Configuration	Select the to-dos configuration that you want to associate with the widget.

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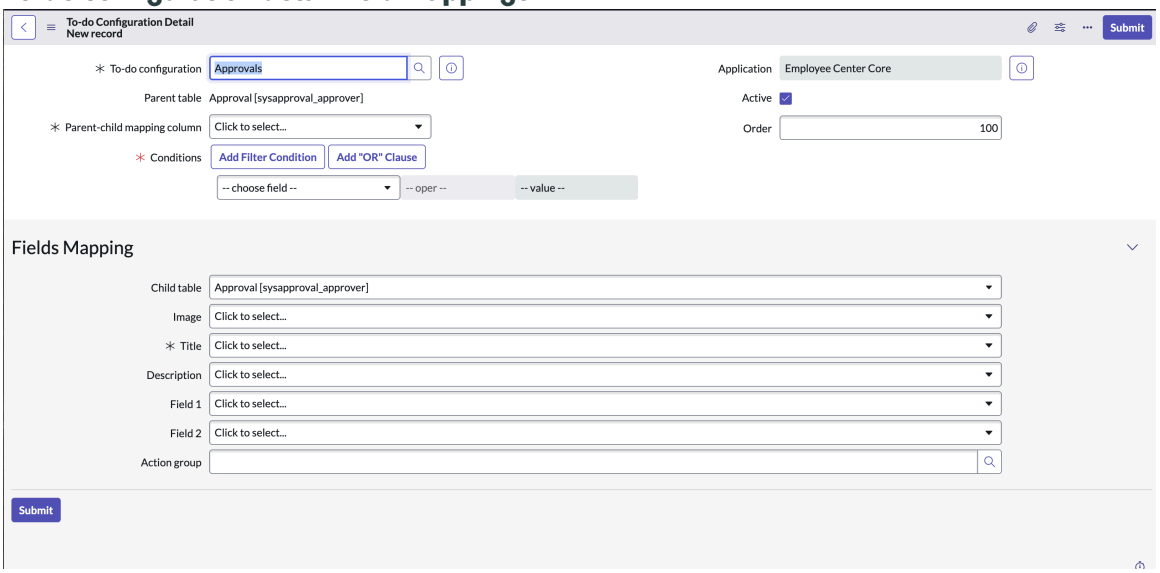
Field	Description
Table	This field is automatically set to the table that the to-dos configuration is associated with.
To-do Target	Select the target table that you want to map the configuration to.
Conditions	Enter the Conditions that a to-do must meet for the configuration mapping. **Note:** When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.
Active	Check box to activate the widget mapping for use.
Order	Enter the order number in which you want the To-do to appear in the widget.

c. Under **Field Mappings**, map the fields of the selected **To-dos configuration** table with the **To-do target** table.

To-do configuration detail field mappings



d. Click **Submit** or **Update**.

9. Click **Submit** or **Update**.

Related topics

Enable task configuration for approvals

Enable prioritization by filter

If you are ordering the to-dos by filter instead of due date, you must enable the **sn_hr_sp.todos_config_display_with_priority** property, add the **Display priority** field to the to-dos configuration form, and assign each to-dos filter a priority number.

Before you begin

Role required: sn_hr_sp.esc_admin

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The to-dos will then be sorted by the filter they are associated with. Within each filter, the to-dos will be sorted by due date.

When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global.

Procedure

1. Enable the **sn_hr_sp.todos_config_display_with_priority** property.
   a. In the navigation filter, enter `sys_properties.list`.
   The System Properties list is displayed.
   b. Open the **sn_hr_sp.todos_config_display_with_priority** property.
   c. In the **Value** field, set the value to `true`.
2. Add the **Display priority** field to the to-dos filter form.
   a. Navigate to **Employee Center** > **Administration** > **To-dos Configuration**.
   b. Or, navigate to **Employee Center Pro** > **Administration** > **To-dos Configuration**
   c. Open a record.
   d. In the to-dos configuration form header, click the menu icon and navigate to **Configure** > **Form Layout**.
   Note: Ensure you are in the Employee Center Core application.
   e. Move the **Display priority** field to the **Selected** column.
   f. Click **Save**.
3. Set the priority number for each to-dos filter.
   a. Navigate to **Employee Center** > **Administration** > **To-dos Configuration**.
   b. Open a to-dos filter record.
   c. In the **Display priority** field, set the priority number.
   d. Repeat the process for each filter.

Configurable task filters

Enable the employee to use filters, filter groups, and categories to easily filter, discover, and fulfill the tasks in a few clicks.

Filters help employees and managers with better visibility into the time-sensitive and business-critical tasks. Admins empower employees to search, filter, and narrow-down the desired tasks. Enable employees to select these filters and display the records that qualify the selected filter condition.

Enable employees to manage their tasks using the admin-configured filters from the **My Tasks** page. Define the following options to narrow-down the desired tasks.

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- **Conditions**: Create conditions and map them to one or multiple filters.
- **Filters**: Create filters and map them to categories or filter groups.
- **Filters groups**: Create filter groups and associate them with multiple filters.
- **Categories**: Create categories and associate them with filters or filter groups.

Admins can create and map conditions to filters. Organize the display preferences with Categories and Filter groups. You can configure the display criteria and order preferences. You can use a condition builder to specify the conditions for a desired task for easier discovery on the **My tasks** page.

You can customize your own filters to suit your business requirements, for example, create a custom filter to display approvals from third-parties such as SAP Concur or Workday.

Employees can use these filters and conditions for Task filters on My tasks

Note: The filter framework is extensible. You can customize your own filters to suit your business needs.

When redirected from Manager Hub to the **My tasks** page, managers can have better visibility into the team tasks or approvals with additional options to organize. The respective Manager Hub filters are pre-applied.

Configure filter conditions

With these conditions, you enable employees to easily filter, discover, and fulfill the tasks in a few clicks.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > *Employee Center* > **Administration** > **To-dos config filter conditions**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Filter condition form

Field	Description
Name	Name of the filter condition.
Application	Application for the filter condition.
Active	Check the box to activate the filter condition for use.
To-dos config	To-dos configuration table. Select the approprite to-do config that suits your task type.
Table	Name of the table that the to-dos configuration is associated with. Table is automatically populated per the selected to-dos configuration.
Condition	Conditions that a task must meet. Use these additional conditions that help narrow-down the desired task.
Add additional condition	Check the box to add more conditions using the script.

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4. Click **Submit** or **Update**.
   The **Condition** is created.

Create filters or filter groups

With these filters and filter groups, you enable employees to easily filter, organize, discover, and fulfill the tasks in a few clicks.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > *Employee Center* > **Administration** > **To-dos filters**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Filter form

Field	Description
Name	Name of the filter or filter group.
Application	Application for the filter or filter group.
Active	Check the box to activate the task filter or filter group.
Is filter group	Option to create a filter group. Filter group can be associated with filters or categories only.
Available for	Option to make the filter available for only to select users, groups, roles, and more. **Note:** This field does not appear when you select **Is filter group**.
Not available for	Option to make the filter unavailable for. **Note:** This field does not appear when you select **Is filter group**.
Description	Descriptive information about the filter.

4. Select **Save**.
   The **Filter** or **Filter group** is created.

What to do next

Proceed to associate the categories, filters, and conditions from the related list. From the related list, select category for the filter. Select a category from the list available from the picker dialog box.

Note: Associate a filter to only one category or filter group.

If you do not select any specific category or filter group, the filter is not visible on the **My tasks** page.

Complete the following mapping per your requirement.

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- For filter group, map **Associated categories** and **Filters**. Also, go to the **Associated filters** related list, click **New**, and fill in the form to add more filters.
- For filters, map **Associated categories** and **Associated conditions**. For sub-filters, map only **Associated conditions** as you cannot map a sub-filter to a category.

Based on your mapping, you make the filters available for employees to use on the **My tasks** page.

Configure filter categories

With these filter categories, you enable employees to easily filter, organize, discover, and fulfill the tasks in a few clicks.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > *Employee Center* > **Administration** > **To-dos filter categories**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

Filter category form

Field	Description
Name	Name of the filter category.
Application	Application for the filter category.
Active	Check the box to activate the filter category for use.
Order	Order in which the filter category should be displayed.
Display on UI	Check the box to display the category on the UI. When this option is not selected, the filter is not shown on the filter bar. **Note:** When you do not select this option, the category appears only in the **All filters** modal.

4. Select **Save**.
   The **Category** is created and the related list **Associated filters** appears.
5. In the **Associated filters** list, Click **New** to associate filters to the category.
6. Fill in the fields on the form.

Associated filters category mapping

Field	Description
Category	Category to which the filter is mapped. For example, `Task type`, `Priority`.
Application	Application for the filter category.
Filter	Filters or filter groups that are available for mapping with the category.

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Field	Description
Order	Order in which the filter or filter group should be displayed in the category.

7. Click **Submit** or **Update**.
   The **Filter category** is created.

What to do next

Based on your mapping, you make the filters available for employees to use on the **My tasks** page.

Employee profile

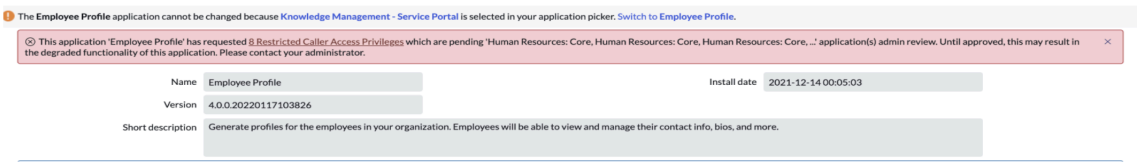
A unified employee profile provides the employee information and offers extensibility for BUs.

Download the latest version from ServiceNow Store to access the work-related employee profile without navigating to multiple systems. Configuration-driven profile design to introduce fields, actions, and widgets related to work-related information.

- Name: **Employee Profile**
- Scope: sn_employee

Note: To manually approve the Requested restricted caller access (RCA), go to sys_store_app.list from navigator. Header has an error message with a link to the RCAs.

Requested restricted caller access



You can allow the RCAs.

You can have a comprehensive view of the employee information to drive business decisions, create intelligent workflows, and deliver personalization across end-user facing applications. Using the employee profile, you can:

- Configure the employee profile design and display preferences.
- Create a modern profile UI to match the social and enterprise needs.
- Enable employees to create and manage personal information from one page.
- Enable profile extensibility across multiple business units.
- Configure work-related info as tabs and personalize the public profile visibility settings.
- Manage the data visibility and extensibility with a scalable profile for future use cases.
- Improve the overall employee engagement and experience.

Configure employee profile

As an admin, you can create an active employee definition and configure the profile components. Manage updates to the employee profile from a central location. See Configure the Employee Profile overview widget.

Note: Actions that require the *admin* role, can also be performed with the *sn_employee.admin* role.

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Use employee profile

As an employee, you can view, edit, and update the privacy preferences profile. See View employee profile

Create an active employee definition

Create an active employee definition to generate the employee profiles.

Before you begin

After you install the employee profile, create an active employee definition to opt in the new unified employee profile. An active employee definition is a condition that determines who an employee is. You can have only one active employee definition per domain.

Note: The employee definition table is domain-separated.

Role required: sn_employee.admin

Procedure

1. Navigate to **Employee Profile** > **Employee Definition**.
2. On the employee definition page, click **New**.
3. Select one of the available **Table** options.
   - To create an employee definition from a user table, select **User**.
   - To create an employee definition from HR records, select **HR Profile**.

     Note: The HR profile table is available only when you install the Human Resources Scoped App: Core [com.sn_hr_core] plugin.
4. Create a condition from the available filters and clauses.
   For example, make sure that the **First name** starts with **All** to generate the employee profiles that match that condition.

   Note: The employee definition condition should be on the indexed columns. Also, keep the condition simple by using only a few filters.
5. To mark the employee definition as active, select **Active**.
6. Click **Save**.
   The **Generate Employee Profiles** option appears with the following message stating that you can regenerate the employee profiles as per the updated definition and generate employee profiles.

   Note: When you have multiple employee definitions, ensure you deactivate the current active definition before activating the other.
7. Click **Generate Employee Profiles**.
   The confirmation appears stating that employee profiles are being created.

   After you install the employee profile, create an active employee definition to opt in the new unified employee profile. An active employee definition is a condition that determines who an employee is. You can have only one active employee definition per domain.

Result

Once employee profiles are generated, you receive an email with the count and the link to view the employee profiles. Verify the new employee profiles created based on your active employee definition from the **Employee Profiles** table. You can also sync profile generation periodically.

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Note: Employee profiles are added incrementally when the active employee definition matches; for any new users that are added to the user table after generating the employee profiles.

What to do next

Once you have employee definition, you can proceed to opt for the employee profile.

Opt in to the employee profile

Enable the new employee details and design by opting in to employee profile.

Before you begin

Role required: sn_employee.admin

Before opting in, create an active employee definition. For more information, see Create an active employee definition.

Note: With Employee Profile (com.sn_employee) plugin, employee profile opt-in is available for EC and EC Pro.

Procedure

1. Navigate to **All** > **Employee Profile** > **Setup**.
   The Opt-in to Employee Profile page appears.
2. Select the **Yes, opt in to employee profiles** option, and select **Opt-in**.
   On the opt-in, employees can use the new employee profile and manage their contact info, bios, and more.

   Note: When you opt in to or opt out of the employee profile, the `sn_employee.employee_profile_enabled` value changes.

   Opting in helps with using employee profiles in AI and ML profile data models.

   - For non-HR customers, AI and ML models are based on the Employee Profile [sn_employee_profile] table.
   - The profile page on the portal [user_profile page for non-HR customers and hri_user_profile page for HR Customers] uses the employee_profile page, which is based on the employee profile table.

     Note: Customers with an HR license continue to use the HR profile ML model even if they have not opted in to the latest employee profile.

3. **Optional:** You can opt out of the new employee profile and revert to the previous workflow by selecting **Opt-out** at any time.

Result

When you opt in, your employees can have the following benefits:

- View a customizable **Employee Profile** page that details the contact info, job description, and more.
- Navigate through an enhanced **Org Chart** experience that offers organization chart, team hierarchy, and better search. For more information, see Organization chart in Employee Center Pro.
- Use employee profile in AI and ML profile data models.

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Configure the Employee Profile header

Configure the Employee Profile header to display useful information about employees, such as their first name, family name, and department. The header enables you to identify the employee quickly.

Before you begin

Role required: sn_employee.admin

About this task

You can configure the Employee Profile header fields to be displayed for all employees. You can configure the following header fields:

- Primary user info including first name and family name and its format.
- Secondary user info such as title, contact number, and preferred pronoun.
- User presence information to show the user status across channels like MS Teams.

Note: From Employee Profile version 11.0.3, you can create multiple active header configurations.

Procedure

1. Navigate to **All** > **Employee Profile** > **Header UI Configuration**.
2. On the Employee Profile Header Configuration form, fill in the fields.
   For a description of the field values, see Employee Profile Header Configuration form.

   Note: For information about the field values of the default profile header record, see Default Employee Profile Header Configuration record.

3. Select **Update**.

Employee Profile Header Configuration form

Use the Employee Profile Header Configuration form to create a header for a profile.

Employee Profile Header Configuration form

Field	Description
Name	Default name or any other name.
Show Pronouns	Option to display user pronouns.
Edit Images	Option to enable employees to edit the avatar and background image.
Disable Links	Option to disable links in the header.
Background Image	Option to enable the background image.
Action Groups	Record of the action group to be added in the header.

Primary User Info

Field	Description
Choose Username Format	Format in which the primary user information is to be displayed. Available options:

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Primary User Info (continued)

Field	Description
	• FirstName, LastName • LastName, FirstName • FirstName, MiddleName, LastName

Secondary User Info

Field	Description
Fields	List of fields to be selected from the list of available options. A maximum of three fields can be selected.

User Presence Info

Field	Description
Channel	List of available channels.
Show Presence Status	Option to show the user presence status for the selected channel.

Configure the Employee Profile overview widget

Configure your instance options to control the appearance of the Employee Profile overview widget, such as the title, number of items to display, icons, and what category of items you want to view.

Before you begin

Role required: sn_employee.admin

About this task

The Employee Profile overview widget displays useful information about an employee enabling you to view information that is most relevant to you. You can have a comprehensive view of the employee information to drive business decisions, create intelligent workflows, and deliver personalization across end-user facing applications. Using the employee profile, you can do the following:

- Organize the employee profile into sections.
- Add fields to display in a section.
- Select fields from the Employee, User, and HR profiles.

Procedure

1. Navigate to **All** > **Employee Profile** > **Overview UI Configuration**.
2. From the Overview Sections list, select **New**.
3. On the Overview Section form, fill in the fields.
   For a description of the field values, see Overview section form.
4. Select **Save**.
   If you select **Submit**, you're redirected to the previous page containing the list of all sections.
   The new section is created. You can proceed to the associated fields suitable for the section.

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5. In the Overview Section Fields section, select **New**.
   A new record page opens.
6. Select **Field Name**, then select an element from the tree based on your preference.
7. Select the appropriate Field visibility option based on your preferences.

   For example, you can select the visibility of your preferred pronoun or any private information according to your choice.

   - Employee only
   - Manager only
   - Employee and Manager
   - Everyone
   - Manager and Other Managers
   - Employee, Manager and Other Managers
   - User Criteria: Provide the access only to specific users, groups, and roles with the user criteria. The field is visible to the users based on:
     - Available For: User group for whom the field is visible. Define and select the user group based on your business needs.
     - Not Available For: User group for whom the field isn't visible. Define and select the user group based on your business needs.

   Values that are defined in the Not Available For group take precedence over values defined in the Available For group. If both values aren't defined, the field is visible to all users. For more information on field visibility based on user criteria, see User Criteria output.

   Note: Use the user criteria cautiously because the profile page load time can take longer based on your criteria.

8. From the available list, select a suitable icon for the field.
9. Select **Submit**.

What to do next

You can add the following default sections and associated fields for your employee profile:

- About
- Bio
- Personal information
- Contact details
- Employment details
- My team

Configure any additional sections based on your business needs.

You can edit or remove the banner by navigating to **All** > **Employee Profile** > **Background banner**.

Related topics

Modify the employee profile widget display

Employee profile

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Overview section form

The overview section form enables you to configure a section on the Employee Profile UI.

Overview Section form

Field	Description
Name	Unique name that identifies the section. For example, About and Personal information.
Layout	Layout determines how the section content is displayed: • Single Column: Displays the content in a single column layout. • Two Column: Displays the content in a two-column layout.
Hide section name	Display settings for the section name.
Application	Domain to which the section belongs to.
Order	Order in which the section is displayed.
Active	Option that indicates if the section content is active or not.
Section visibility	Visibility settings for the section: • Mobile only • Desktop only • Desktop and mobile

User Criteria output

User Criteria output based on **Available For** and **Not Available For** values.

User Criteria output

Available For	Not Available For	Result
Not defined	Not defined	Accessible to all users.
Not defined	Defined	Accessible to all users except the users falling under **Not Available For** criteria.
Defined	Not defined	Accessible only to the users falling under **Available For** criteria.
Defined	Defined	Accessible only to the users falling under **Available For** criteria.
Defined	Defined (with some users falling under **Available For** criteria)	Accessible to all users falling under **Available For** criteria and not falling under **Not Available For** criteria.

Modify the employee profile widget display

The employee profile widget displays the tabs and work-related information hierarchy. You can configure the instance options to control the number of tabs to display.

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Before you begin
Role required: sp_admin (or) admin (or) sn_employee.admin

Procedure

1. Navigate to **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Click profile widget on the primary navigation bar.
   The profile page appears.
3. Press and hold the control key on the keyboard, right-click the about me widget, and then select **Instance Options**.
4. Configure the instance options.

Employee profile instance options

Instance option	Description
Number of tabs to display	Count of tabs to display on the employee profile in the range of 1-10. Default: 4
Widget overview panel	Select to display the left navigation menu (widget overview panel).

5. Click **Save**.

Related topics

Employee profile

Update the Employee Profile banner and profile images

Upload or update the banner and profile images for your Employee Profile page with the upgraded edit features.

Before you begin
Role required: Employee Profile user

About this task
Update the banner and profile images for Employee Profile page with the enhanced editing options. You can also use the default banner image. The default profile image setup takes the initials of the name of the user.

Procedure

1. Navigate to **Self-Service** > **Employee Center**.
2. Go to the user avatar and select **Profile**.
3. Select the camera icon and then select **Browse image** on the welcome screen to select an image to upload, For the first time.
   The Add cover image welcome screen mentions all the file types accepted for the banner image.
4. **Optional:** You can edit the image by using the updated editing options, such as, **Rotate**, **Zoom**, **Flip**, and **Drag to reposition image**.
   If you want to undo or redo the changes made to the picture, click **Reset** to take the image back to its initial-uploaded state.

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5. **Optional:** There are two more options visible on the initial upload screen to change the image or upload the current one.
   - **Change image**
   - **Apply**
6. After the initial upload, the Edit cover image screen has an extra **Remove image** option, which takes you back to the default banner image.
   After the initial image upload, the camera icon at the top-right corner changes to a pencil icon to signify, edit option.

   Similar editing options are available for the profile image.

Result
The user can customize the banner and profile images according to their preferences with the upgraded edit features.

Manage profile tabs and visibility in Employee Profile

Enable the display of work-related content in the employee profile to help customize the public profile visibility settings.

Before you begin
You can use the profile tab UI only as follows:

- When the admin opts in to the employee profile
- When the employee meets the employee definition
- When the employee has a corresponding profile record in the employee profile table

Role required: sn_hr_sp.esc_admin

About this task
Provide employees with a professional landing page and help control the information visibility across the organization. You can use the default tabs or create tabs. Using the tabs UI, you can do the following:

- Enable admins to configure the profile information in tabs.
- Configure tabs, widgets, and visibility of profile information.
- Add information from other widgets such as the HR widget and EX widget.
- Provide employees the flexibility to personalize the visibility settings.

For employees, the tab UI appears only when more than one tab is available for display.

Note: For non-employees, the profile information appears as a flat page with the Employee Profile Overview, Employee Profile My Team, Employee Documents List, Granular Delegation List, and HRI Contacts widgets.

Procedure
1. Navigate to **All** > **Employee Profile** > **Profile Tabs**.
2. Select **New** or open a record.
3. On the form, fill in the fields.

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Employee profile tabs form

Field	Description
Name	Name of the tab.
Display Name	Tab name to display on the portal. If this field is empty, the value of the **Name** field is displayed on the portal.
Application	Application for the tab.
Active	Option to activate the widget in the tab for use.
Order	Order number that you want the tab to appear in.

When you configure and mark multiple tabs as active, the information is displayed as tabs on the profile.

4. Select **Submit** or **Update**.
   The tab is created or updated.
5. From the Tab widget mappings related list, select **New** or edit an existing record.
6. On the Tab widget mapping form, fill in the fields.
   For a description of the field values, see Tab widget mapping form. The Tab widget mapping **sys_id** is available in the *`tabWidgetMappingId`* variable of the widget options object.

   Note: The *`widgetTitle`*, *`tabWidgetMappingId`*, and *`isUserSelectionEnabled`* variables are available only within the scope of the Employee Profile tab UI.

7. Select **Save** or **Update**.

Result

The **Profile** tab is configured with the widget and visibility settings for employees to view and personalize the visibility. On the UI, the different tabs are visible in a sticky format even when the user scrolls through the page. All widgets under a particular tab are available in the form of navigation menu items.

The admin can use the instance options to configure the visibility of the navigation menu by selecting the **Widget overview panel** option.

Related topics

Employee profile

Configure Employee Profile for a portal

Configure the Employee Profile for a portal by creating a configuration record and mapping a header and tabs.

Before you begin

Note: The Employee Profile portal configuration is available from Employee Profile version 11.0.3. If you're upgrading from an earlier version, the profile pages on all portals are updated based on upgrade scenarios. For more information, see Employee Profile upgrade scenarios.

Role required: sn_employee.admin

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Procedure

1. Navigate to **All** > **Employee profile** > **Portal Configuration**.
2. In the Employee Profile Portal Configuration page, select **New**.
3. On the Profile Portal Configuration form, fill in the fields.
   For a description of the field values, see Employee Profile portal configuration form.
4. In the tab-mapping section, select **Edit**.
   The tab-mapping page opens.
5. Map tabs to the profile based on your requirement.
   a. Select a tab from the first pane.
   b. Select the add arrow to add the tab to the profile.
   c. Repeat steps a and b to add tabs to the profile.
   d. Select **Save**.

   Note:

   You can create a tab configuration from the tab-mapping section by selecting **New**. For more information, see Manage profile tabs and visibility.

6. Save the record.

Employee Profile form

An option in the Employee Profile configuration that provides a list of employee profile fields.

The following list of configurable fields indicates the personal, sensitive, and employment information.

- Employee number
- Employment end date
- Employment start date
- Nickname
- Legal name
- Preferred pronoun
- Short bio
- Work mobile phone
- Work phone
- Location
- Location type
- Position
- Position type
- Background banner
- Created by
- Created
- Sys ID
- Updates (Integer)

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- Updated by (String)
- Updated (Date/Time)
- User Work phone

For HR profile field configuration, see HR profile editable field configuration.

Related topics

Employee profile

Employee Profile portal configuration form

Use the Employee Profile Portal Configuration form to configure the profile for a service portal.

Employee Profile Portal Configuration form

Field	Description
Name	Name of the profile configuration. For navigation and other information, see Employee Profile portal configuration form, Employee Profile upgrade scenarios, Employee Profile Header Configuration form, and Employee Profile form
Active	Option to make the profile configuration active.
Portal	Portal on which the configuration is applied.
Widget Overview Panel	Option to enable the overview panel on the profile.
Order	Order number of the profile in the portal.
Header Configuration	Header that is to be displayed on the profile.

Employee Profile upgrade scenarios

After upgrading Employee Profile to version 11.0.3, the profile pages on all portals are updated based on the following scenarios.

Upgrade scenarios for Employee Profile

Portal	Upgrade Scenario
Employee Center	• All active tabs are associated with the profile page. • The widget overview panel is visible. **Note:** To disable the widget overview panel, you must create a profile portal configuration. For more information, see Configure Employee Profile for a portal. • If an Employee Profile header configuration record doesn't exist, the default record is used.

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Upgrade scenarios for Employee Profile (continued)

Portal	Upgrade Scenario
	• If an Employee Profile header configuration record exists, it's updated with the following fields and values: ○ Action Groups: Filled from the widget instance options ○ Background Image: Selected ○ Edit Images: Selected ○ Disable Links: Cleared
Custom portal	• All tabs are associated and visible on the profile page. • The widget overview panel is visible. • If an Employee Profile header configuration record doesn't exist, the default record is used. • If an Employee Profile header configuration record exists, it's updated with the following fields and values: ○ Action Groups: Filled from the widget instance options ○ Background Image: Selected ○ Edit Images: Selected ○ Disable Links: Cleared

Add other manager relationships for an employee

Add other manager relationships to set up dotted-line reporting for an employee.

Before you begin

An employee profile definition must be created and opted in to add other manager relationships. For more information, see Opt in to the employee profile.

Role required: sn_employee.admin

About this task

Use the Other Manager Relationships module to create many-to-many dotted-line relationships between employees and managers. You can define custom relationships for the managers, such as supervisor, project lead, and so on. The other managers and other reports are displayed in the employee profile teams widget and the organization chart.

Procedure

1. Navigate to **All** > **Employee Profile** > **Other Manager Relationships**.
2. On the other manager relationships page, select **New**.
3. On the form, fill in the fields.

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Other Manager Relationship form

Field	Description
Employee	Employee profile record of the employee.
Other manager	Employee profile record of the other manager.
Relationship type	Type of relationship of the manager to the employee. You can define custom relationships such as supervisor or project lead.

Note:

The specified employee, manager, and relationship type shouldn't match with an existing other manager relationship record.

4. Select **Submit**.

Add an Employee Profile page bio in the upgraded section

Add a short bio comprising interesting details about yourself in the add a bio section of the Employee Profile page.

Before you begin
Role required: Employee Profile page user

Procedure

1. Navigate to **All** > **Employee Center** > **Profile**.
2. In the overview section, click **Add a bio** to get the text area to type in your details.
   The maximum character limit is 256. You can follow the retracting character limit as a reference while typing. If you are over the character limit, you see the overflow text count highlighted in red.

Result
The add bio text area lets employees update key aspects about themselves on their Employee Profile page to gain better understanding of each other's backgrounds and interests.

Manage the employee profile AI and ML model

Use the employee profile Artificial Intelligence (AI) and Machine Learning (ML) model to view recommended articles and catalog items for similar users.

Before you begin
Role required: Employee profile admin

Opt in to employee profile. For more information, see Opt in to the employee profile.

About this task
Discover recommendations from similar users using the employee profile ML model. These recommendations remove the dependency on the HR profile ML model. Identify the Knowledge articles and catalog items that are most viewed by similar users. Display the Recommended for you section based on the instance configuration made by the admin.

You can Modify the Recommended for you widget display to show more results.

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Note: HR customers continue to use the HR profile ML model regardless if they opt in to employee profile.

Procedure

1. Navigate to **All** > **Employee Profile** > **Employee Profile AI Configuration**.
2. To create a record under the default similarity definition, click **New**.

Trouble?
The employee profile admin can Manually train the employee profile predictive model if the similar user model is not auto-trained after opting in to employee profile.

What to do next

Employees can browse through the Knowledge articles and catalog items viewable in the Recommended for you section using the employee profile ML model.

Manually train the employee profile predictive model

Manually train the employee profile predictive intelligence to model similar users if auto-train is not enabled by default.

Before you begin

Role required: sn-employee.admin

Procedure

1. Navigate to **Self-Service** > > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. Select **Train** for **Similar users model for employee profile** (*ml_x_snc_sn_employee_global_similar_users_model_for_employee_profile*). A similarity definition record is created after the training is finished.

Note:

- Set the variable system property to **True** with the **Application** scope set to **Global** to use the auto-train model on Employee Profile.
- Provide a minimum of 10 records to use the auto-train model.

Updates for the Employee Profile HR widget

The Employee Profile HR widget has three additions, My Contacts, My Delegates, and Employee Documents.

Three new widgets have been added to the Employee Profile HR widget, namely, My Contacts, My Delegates, and Employee Documents.

Separate plug-ins must be installed for each widget to work. The My Contacts records require the Human Resources: Core plug-in to get the contact details. The My Delegates details are pulled from the granular delegation plug-in. Moreover, the Employee Documents plug-in pulls data from the employee documents management plug-in.

The user can add delegates via the **Add Delegates** button on the My Delegates widget and add contacts via the **Add new contact**.

For more information on managing the documents of an employee, see Managing employee documents.

For more information on adding delegates, see Granular Delegation.

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Preferences widget for Employee Profile

User Preferences can be accessed as a separate Preferences widget for customers who have opted in for the Employee Profile.

User Preferences on the user profile page, is available, on the Employee Center and Employee Center Pro portal, as the **Preferences** widget for customers who have opted in to the Employee Profile.

If you have opted in to the Employee Profile, you can see the **Preferences** option available on the list when you select your user avatar.

You can manage **Display** options like, **Date and time format**, **Timezone**, **Language** from **Preferences**. You can also choose your settings for **Accessibility**, **Notifications**, and **Debugging** as required.

The **User preferences** on the user profile page is no longer available for Employee Profile customers.

However, if you have never opted in to the Employee Profile or have opted out of it, you can still see the embedded feature residing on the user profile page.

Quick start tests for Employee Center

Validate the continued functionality of the Employee Center after any configuration change such as an upgrade or after developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

All test suites and tests should pass on a default implementation. To validate a custom implementation, copy the automated tests and configure them for your customizations.

Quick start tests are disabled and read-only test templates. By default, they only produce a pass result when you run them with the default demo data that is provided with the application or feature plugin.

To make quick start tests produce a pass result when you run them with your instance-specific data, copy and configure them to use your instance data.

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

The Agile Development 2.0 (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests (com.snc.sdlc.agile.2.0.atf) plugins must be enabled.

Note: When running, demo data is required.

Employee Center

Employee Center quick start tests

Test	Description	Release version
Create Adhoc Delegation for Approval Task	Ensures an adhoc delegation for an approval task can be created from the My Tasks form in the Employee Center.	San Diego
Create Adhoc Delegation for HR Task	Ensures an adhoc delegation for an HR task can be created	San Diego

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Employee Center quick start tests (continued)

Test	Description	Release version
	from the My Tasks form in the Employee Center.	
Employee Center - My Favorites	Verifies the favorite functionality in the Employee Center. Also verifies when a KB article or catalog item is added to the Favorite widget.	San Diego
Employee Center - Approval Hub Approve Request	Verifies the approval functionality in the Employee Center. Also verifies that when a request is approved, it appears in the user's **Completed** column.	San Diego
Employee Center - Approval Hub Reject Request	Verifies the rejection functionality. Also verifies that when a request is rejected, it appears in the user's **Completed** column.	San Diego
Employee center - Employee Profile Generation	Verifies that employee profiles are generated as per the employee definition.	Xanadu
Employee Center - Topic Page	Associates a KB article or catalog item to a topic and verifies they display on the topic page.	San Diego
Employee Center - Validate home page widgets	Validates the following widgets are present on the Employee Center home page: • Relevant for you • Popular topics • My Active Items • Quick tasks • Homepage Search	San Diego
ESC: Employee can see ticket updates	Employees can view updates to their tickets.	Quebec
ESC: Post General HR Inquiry questions on ESC portal	Verifies an HR employee can create a General Inquiry case and post general HR inquiry questions on the ESC.	Quebec
ESC: Submit a Record Producer which creates Universal Request and HR Case	Verifies a user can submit an HR catalog item that creates a Universal Request. Also verifies the Universal Request	Quebec

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Employee Center quick start tests (continued)

Test	Description	Release version
	and HR case are created and linked.	
ESC: Verify Standard Ticket page on ESC for HR Case	Creates a general inquiry case from the service portal and verifies it appears on the standard Ticket page.	Quebec
ESC: Verify widget contents in Catalog items	Verifies the widget content in a Catalog page.	Orlando
ESC: Verify widget contents in knowledge pages	Verifies the widget content in a Knowledge page.	Orlando
HR: Search catalog items & KBs in ESC	Verifies the search functionality in the ESC.	Quebec
Taxonomy and Topic Creation	Creates taxonomy and topics and then adds content to the topic.	San Diego

Run quick start tests for Employee Center

Employee Center provides several quick start tests you can run.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Automated Test Framework** > **Tests**.
2. Search and select the quick start tests you want to run.
   For information on available quick start tests, see Quick start tests for Employee Center.
3. Click **Run Test**.
   The Test Steps tab provides each step of the quick start test.
   After the tests run, the Step Results tab shows the status of each test step. Screen shots also appear at the top of the form as attachments.

What to do next

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

Using Employee Center

Use the Employee Center portal to raise requests, work on to-dos, and search for information.

Use the Employee Center topic pages

The Employee Center topic pages contain the breadcrumbs widget, topic header widget, sub-topic widget, and the topic content widget.

Breadcrumbs widget

The breadcrumbs widget displays information about the pages you navigated to open the current page. For example, from the home page if you click **HR**, and then click **Benefits**, and then

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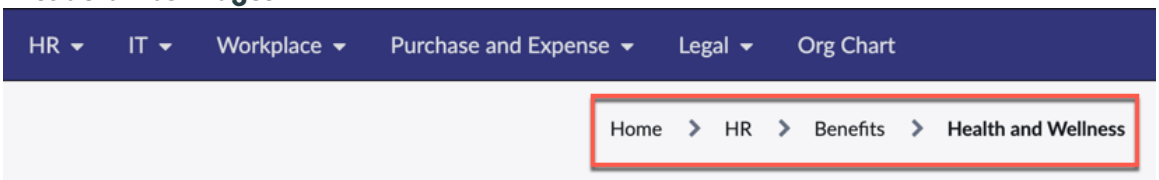
click **Health and Wellness**, the breadcrumbs widget shows **Home > HR > Benefits > Health and Wellness**.

Breadcrumbs widget



Click a page name on the breadcrumbs widget to navigate to that page. For example, to return to the home page, click **Home**.

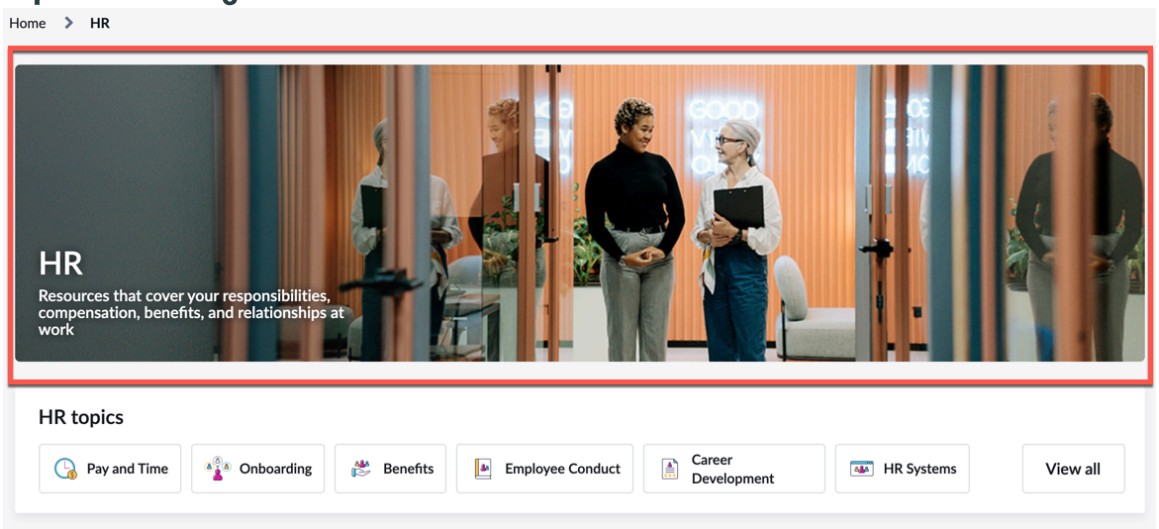
Topic header widget

The topic header widget displays the parent topics. Select a topic from the mega menu to view its details. The topic widget displays the description of the topic and the banner and icon images for the topic, if available.

Note: If you schedule Styled or Banner content to the Content Experiences widget on the emp_taxonomy_topic page, the original topic banner image does not display for the topics on the schedule.

For more information on creating and scheduling content, see Creating employee communications.

Topic header widget



You can modify the widget display by configuring the instance options. For more information, see Modify the topic header widget display.

Sub-topics widget

The sub-topics widget displays all the child topics of the parent topic. The sub-topic widget displays only those child topics that have connected content.

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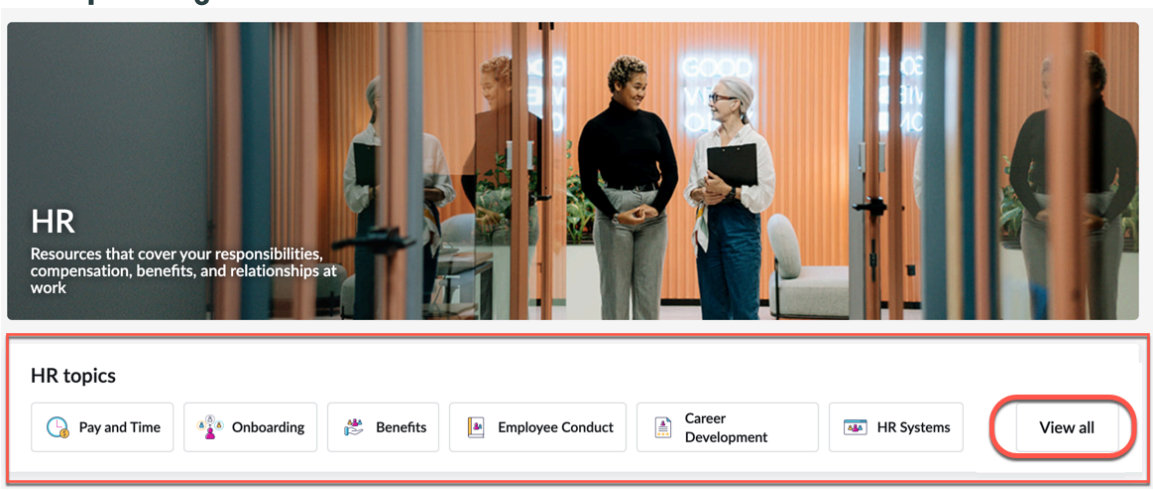
Sub-topics widget



The sub-topics widget shows only six child topics by default. If the parent topic has more child topics, click **View all** to view all the child topics and click the one you want to open.

You can modify the widget display by configuring the instance options. For more information, see Modify the sub-topics widget display.

Topic content widget

The topic content widget displays the knowledge articles and requests associated with the topic.

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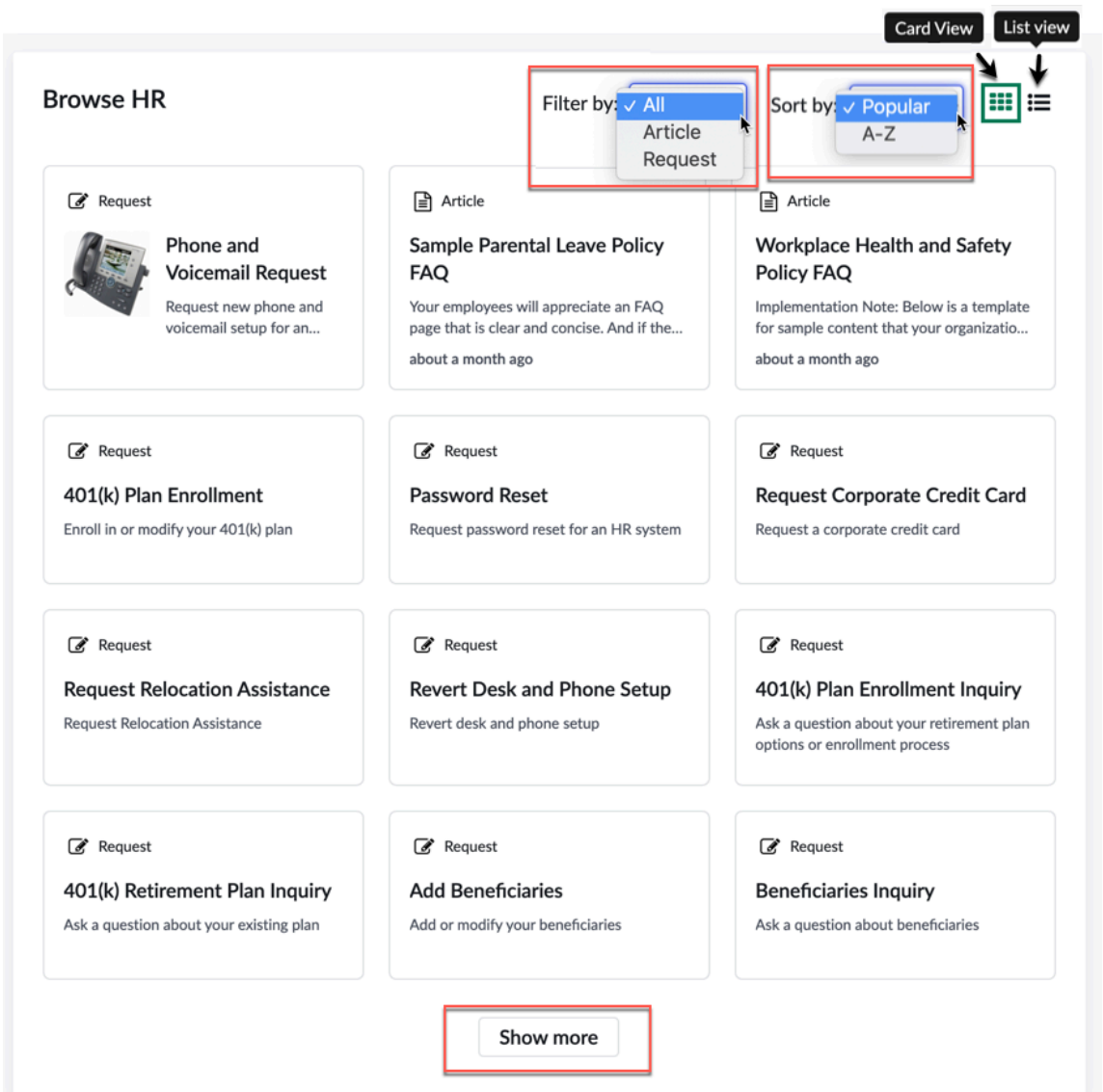
Topic content widget



The topic content widget has the following options.

Options in the topic content widget

Option	Description
Filter by	How you want to filter the information. The options are: • **All:** Displays both the knowledge articles and requests. • **Article:** Displays only knowledge articles. • **Request:** Displays only requests.
Sort by	How you want to sort the information. The options are: • **Popular:** Displays the most popular knowledge articles and requests. • **A-Z:** Displays the knowledge articles and requests in alphabetical order.
Card View	Displays the knowledge articles and requests in cards.

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Options in the topic content widget (continued)

Option	Description
List view	Displays the knowledge articles and requests in lists.
Show more	Displays the next set of 12 content items (knowledge articles and requests), based on the settings of the **Sort by** and **Filter by** options. By default, 12 content items are displayed for a topic. This option appears only when more than 12 content items are associated to a topic.

Note: The A-Z sorting is not supported for non-English.

Search on the topic pages

Use search on the topic pages that allows you to browse content with its spell check, synonym detection, and other auto-suggestive functionalities.

Search by the topic facets

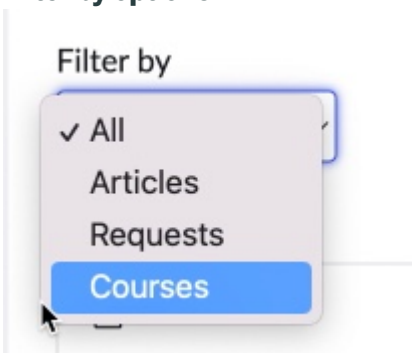
Narrow your search with hierarchical filters for topics and sub-topics on the global search. Choose single or multiple topic levels or facet levels to get specific search results. For more information, see Improved search functionality.

Learning content on the topic pages

Use learning content as one of the connected content types, available on the topic pages, for the licensed employees. Employees can browse, filter, sort, and add to favourite the course content available on the topic pages relevant to them.

The Unified Browse widget has **Courses** as an addition to the **Filter by** listed options.

Filter by options



You can modify the widget display by configuring the widget instance options. For more information, see Modify the topic content widget display.

Topic managers and contributors for topic page management

While topic managers control the topic level decisions, the contributors manage the connected content, quick links, adding applications, and featured content on the topic page.

Topic manager level permission works in a top-down manner. The managers can move, copy, or change any details on the topic pages they have been provided access to along with the sub-tree further down.

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Note:

- **Topic manager** does not have permission to create a root topic.
- **Topic Manager** cannot create or change user criteria, even for topics created by them, unless the manager has user_criteria admin role.
- When the manager moves a topic from one parent to another, the topic loses any cascaded permission configuration and takes on the configuration of the new parent. However, it retains any changes made on a topic level, before the move.
- If a topic is cloned or copied under a new parent topic, the topic loses all its previous permission configuration, both the cascaded ones and the ones made on the topic level.
- The **Topic manager** user criteria can move topics between taxonomies if the manager has access to more than one taxonomy.
- **Topic manager** can perform all the **Topic contributor** actions as well as managing and creating topics.

Topic contributor level has been introduced to manage all topic level tasks, such as, linking Connected content, Quick links, adding applications, and Featured content. Contributors also have a top-down access control. The user criteria only work further down the sub-tree from the topic that it has been added.

Use the My To-dos page

Use the To-dos page to review all tasks that are assigned to you and prioritize them.

My Tasks

The **My Tasks** tab on the Employee Center and Employee Center Pro helps you organize your assigned tasks and allows your employees to view all assigned work in one place. The **My Tasks** tab appears at the top right with the task count. When the tasks are more than 10, tasks count displays 9+.

Open: After selecting **My Tasks**, the left side of the form shows the Open and Completed tabs. Lists all to-dos that have not been completed.

- Required tasks have a **Required** label and appear in the **Open** column with the number of days the task is due or past due.
- When the due date is less than two (2) days or less from the current date, an exclamation point icon () appears to the left of the due date.
- When the due date is overdue, an exclamation point icon appears to the left of the Overdue text.

Completed: Lists all tasks that have been completed. The most current completed tasks appear at the top of the list and sorted by time-stamp.

The status for each open and closed to-do are:

- Approved
- Completed
- Closed
- Canceled
- Skipped

Note: The completed status also has a green check mark icon next to it and with information on when the to-do was completed.

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Content Request

A **Content Request** appears under **My Tasks**, if you have been assigned as an approver for new content. For more information about content requests, see Requesting content.

A content request approval appears under **My tasks** under the **Open** column when the content request item is moved to the **In Review** state.

After selecting the content request, the content can be previewed, approved, or rejected.

My Requests

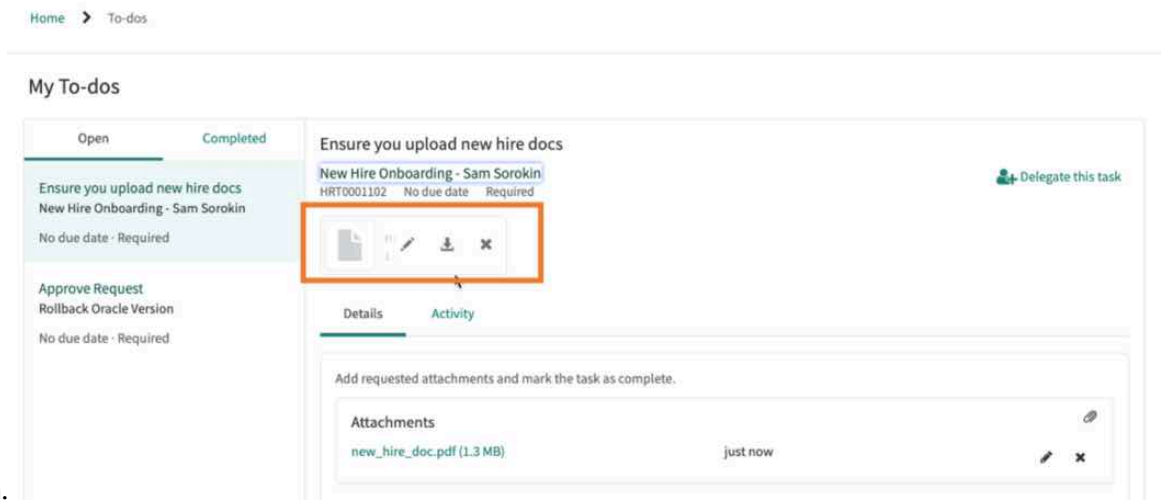
The **My Requests** tab on the Employee Center and Employee Center Pro shows all the requests you have made. There are filters to show open or closed requests. Your requests display with the most current request at the top.

To-do Summary Area: To the right of the **Open** and **Completed** columns is the **To-do Summary Area**. When you highlight a to-do, details appear in this area. The **To-do Summary Area** has two columns:

- Details: Provides information, buttons, and fields about the task so you can complete it.
- Activity: Provides information, buttons, and fields about the activity so you can complete it. You can also access activities from the Lifecycle Event Ticket page.

Note: Previously, this tab was the **History** pop-over.

Attachments appear at the top of the form.



Hover over an attachment to see a list of actions you can take:

- Rename the attachment
- Download the attachment
- Delete the attachment

You can also preview image attachments.

Note: Not all attachments can be viewed.

Approvals and rejections

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Managers or designated approvers can receive approval tasks under **My Tasks** in the menu bar in the Employee Center or from **My Approvals** under **Self-Service** for

- Requests (REQ): If there are items (RITMs) under a Request (REQ), the items may require additional approvals.
- Requests for items (RITM): The default threshold is $1000 and defined in the Service Catalog Request (sc_request) and found in the Workflow Editor. Any item requested that is $1000 or more requires an approval.

  Note: For more information, see Workflow editor.

- HR cases: Some HR cases through their related HR service are configured to require an approval.

  Note: For more information, see Configure a service activity for an HR service.

  For example, the base system provides the Tuition Reimbursement Request and Request Corporate Credit Card HR services and they require an approval.
- Granular Delegation: Granular delegation allows employees to delegate their tasks, like approvals, to other employees for specific date and time ranges based on delegation rules.

  Note: For more information, see Granular Delegation.

Note: By default, approvals do not require a comment. Rejections by default require a comment. Customers can add an access control rule (ACL) that prevents a user from writing a comment for rejections. For more information, see Configure ServiceNow access control.

As an approver, use the templates with common info, primary info, tabs, and action groups to make informed decisions.

- View the right information based on the approval type.
- Understand the request tables for better approval experience.
- Configure and display relevant and sufficient info and widget details.
- Task configuration provides the following in-context information by default.
- Delegate the approval or perform quick actions such as Approve or Reject.

Understand the approval information available out-of-the-box:

- Requested for
- Created by
- Opened by
- Delegate this task
- Requested items
- Attachments
- Activity
- Action group to approve or reject

Alternatively, you can customize additional fields to streamline the approval workflow further.

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Use approval experience

Use the **My tasks** section to track and fulfill the requests from the portal and Now Mobile.

As an approver, view all your approvals with the in-context details such as common info, primary info, tabs, and the associated action groups.

Approval hub

You can perform the following actions from the portal and Now Mobile.

- View the assigned open tasks and requests on the My tasks section.
- View and track the approval requests from external business applications such as SAP Concur and Workday right from your ServiceNow instance.
- Understand the in-context details such as expense amount, requested for, attachments, state, and last comment for processing the approvals.
- Click URLs and navigate to external sources for additional context and information.
- For Workday, attachments support a max limit of 12 MB. Ensure the attachment size is below 12 MB.
- Apply filters, select multiple line items, and perform actions such as approve all or reject all.
- Navigate to the external sources such as Workday and SAP Concur to view the full report.
- Perform quick actions such as approve, send back, or view details.
- When you enable e-signatures for approvals, the approver must enter the correct credentials to change the approval state. Only when the credentials pass, the approval status changes.

For more information, see Approvals experience reference and Approvals hub.

Manage approvals from Microsoft Teams

Manage Concur expense approvals using Virtual Agent actionable notifications in Microsoft Teams to resolve the approval directly in the Virtual Agent conversation without involving a live agent.

Before you begin

- The Virtual Agent integration is supported only for users who have a user record in your ServiceNow instance. Users must link their accounts to Microsoft Teams and enable Virtual Agent notifications.
- Install the Approvals hub integration with the SAP Concur (sn_ex_cnc) plugin.

For more information on receiving notifications, see Conversational Integration with Microsoft Teams and Enable Virtual Agent notifications. For more information on Virtual Agent, see Virtual Agent.

Role required: approver_user

Procedure

1. Launch the Microsoft Teams application.
2. Open the **Now Virtual Agent** chat window.
3. Enter `Show notification` in the chat window.
4. **Optional:** View the report by selecting **View Report**.
   You can also view the report later by selecting **Skip** and entering `Show notification` in the chat window.

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5. **Optional:** View expense and receipt items by selecting **Expenses and Receipts**.
   A maximum of 12 expense items are displayed in the report. To view all items, select **View full report**.
6. Approve or reject the report.

> **Note:** You cannot accept or reject a report if the assigned approver has been modified or the report has been updated or closed.

Decision	Action
Approve the report	Select **Approve**.
Reject the report	**a.** Select **Send back**. **b.** Enter a reason for rejecting the report.

Manage approvals from a Microsoft Outlook email

Approve or reject Concur expense reports from a Microsoft Outlook email message.

Before you begin

The Approvals hub integration with SAP Concur (sn_ex_cnc) plugin must be installed.

Role required: approver_user

Procedure

1. Launch the Microsoft Outlook application.
2. Open the Concur Pending Approval Report email message.
3. **Optional:** View expenses and receipt items by selecting **Expenses and receipts**.
   A maximum of 12 expense items are displayed in the report. To view all items, select **View full report**.
4. Approve or reject the report.

> **Note:** You cannot accept or reject a report if the assigned approver has been modified or the report has been updated or closed.

Decision	Action
Approve the report	Select **Approve**.
Reject the report	**a.** Select **Send back**. **b.** Enter a reason for rejecting the report.

Task filters on My tasks

Use the enhanced filters experience to manage and prioritize the tasks. Using the filters, employees and managers can have better visibility into the time-sensitive and business-critical tasks.

With filters, Admins empower employees to search, filter, and narrow-down the desired tasks that are time-sensitive and business-critical. Using the options, employees can manage their tasks using the admin-configured filters from the **My Tasks** page.

Use filters to easily filter, discover, and fulfill the tasks in a few clicks. Select these filters and see the records that meet the selected filter condition.

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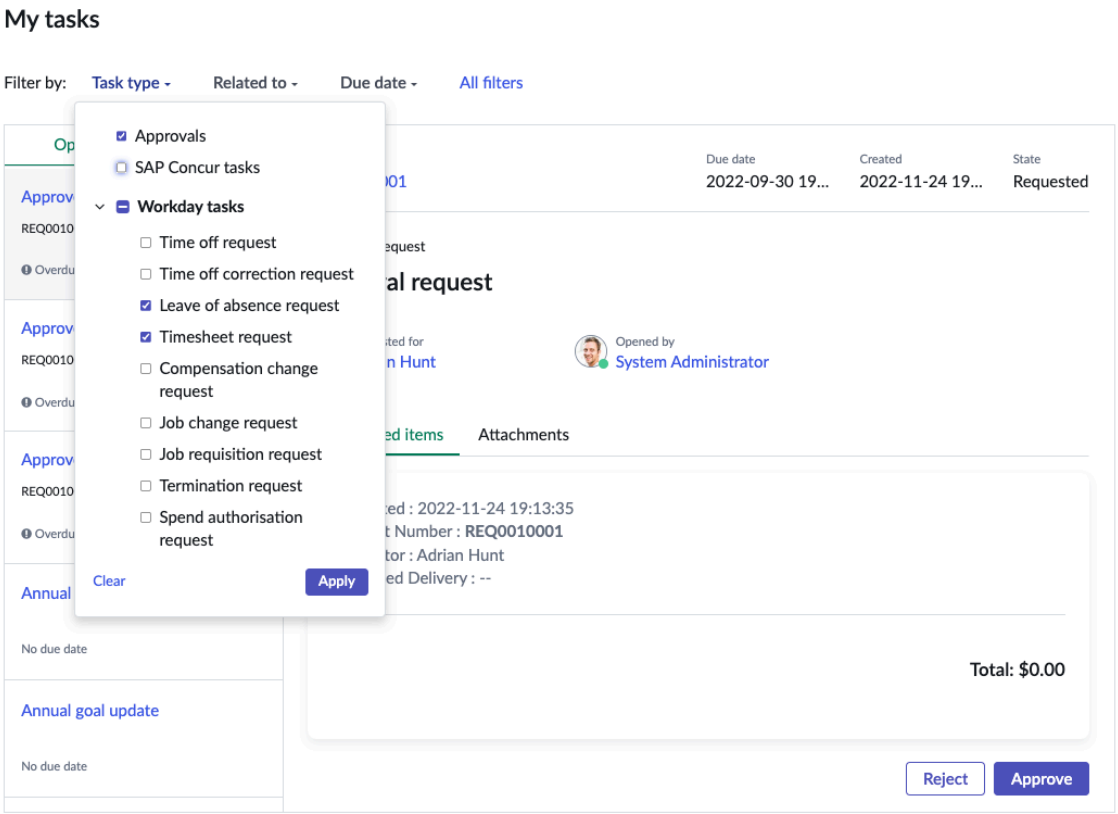
Filter preferences on the my tasks page



- Organize and view the tasks by different filters like Task type, Priority, Due date, My team approvals, and so on.
- Use the Task type filter to choose from Approvals, SAP Concur tasks, Workday tasks, Requests, and so on.
- Select, change, and remove filters to discover your tasks.
- Discover and fulfill the tasks such as on-boarding, approvals, and learning.

For configuration steps, see Configurable task filters

View the Recommended for you content

Access all the content recommended for you from from a central location in one-click.

As an employee, you can access the recommended knowledge articles or catalog items from the **Recommended for you** widget.

- Knowledge articles recommendations are based on the view count of article.
- Catalog item recommendations are based on the number of times it is requested for.
- The recommendations associated to the portal taxonomy are displayed on the home page.

Recommended for you

For more information, see Recommended for you

Use Employee Center from Zoom

Access and use the ServiceNow® Employee Center capabilities from Zoom client.

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Before you begin

Only if your admin has connected the Zoom account to ServiceNow instance, you (employee) can access ServiceNow Employee Center in the Zoom application or you can install ServiceNow Employee Center from Zoom App Marketplace.

Role required: Employee

Procedure

1. Log in to your Zoom application.
2. Navigate to **Apps** > **Discover**.
3. Search for and select **ServiceNow Employee Center**.
4. Enter your ServiceNow login credentials and select **Log in**.
   The ServiceNow Employee Center homepage is displayed.

Related topics

Employee Center for Zoom

View employee profile

View the employee profile with your personal information from the employee portal and Now Mobile.

Manage your profile

As an employee, you can view or update the *About, Profile Picture, Add Bio, Personal information, Background Banner, Contact details, Employment details, Preferred Pronoun, and My team* fields:

You can view and edit the employee profile from the portal from the header. The different tabs (such as Overview, Career, and Work Items) are visible in a sticky format even when the user scrolls through the page. All widgets under a particular tab are available in the form of the left navigation menu items.

The admin can use the instance options to configure the visibility of the left navigation menu by selecting the **Widget overview panel** check box.

Note: From Employee Profile version 11.0.3, the Widget overview panel check box is configured from the Profile Portal Configuration.

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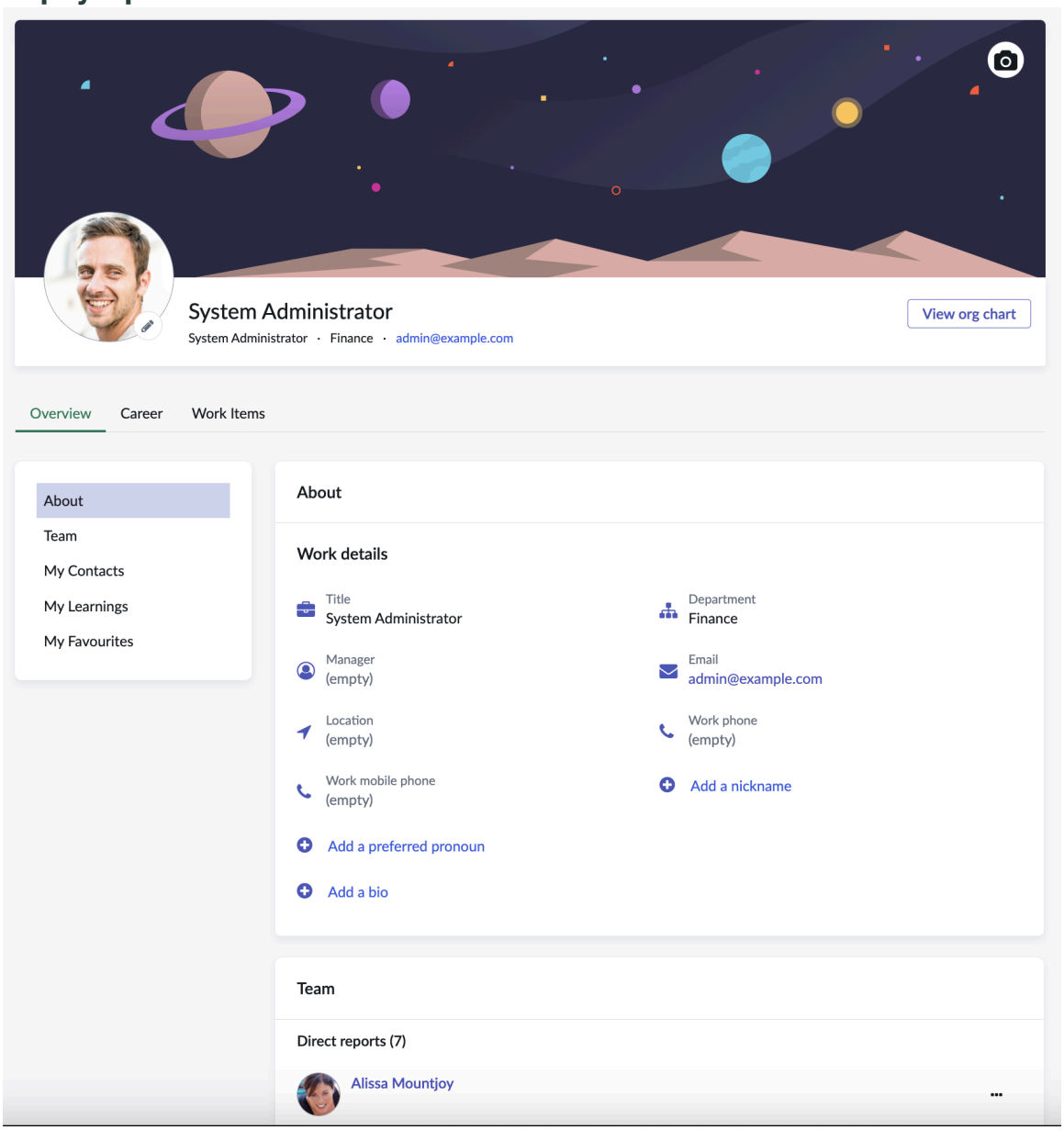
Employee profile overview



You can view the employee profile from mobile application:

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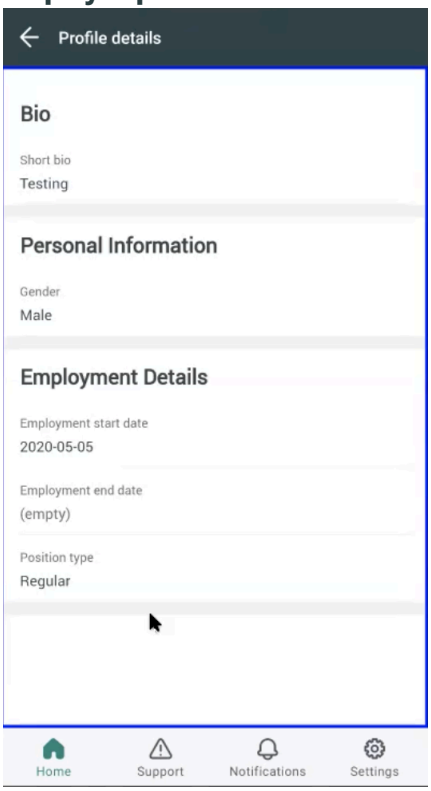
Employee profile on Now Mobile



Specify your data visibility and privacy preferences by marking the field information for public or private distribution:

- Define work-related data on your profile.
- Manage the profile data visibility and privacy.
- Learn more about your team and organizational structures.

For more information, see Configure the Employee Profile overview widget.

Related topics

Modify the employee profile widget display

Employee profile

Use Personalized Answers

Employees can use the AI-search enabled feature to seek information about their leave balance and more on the Employee Center search page.

Personalized Answers is an AI search-enabled feature, integrated with one or more third-party integrations to provide relevant and informative content from the search page on Employee Center.

Personalized Answers- time off feature has location-specific data. The default third-party integrations available are Kronos and Workday for specific regions that show the leave balances of employees of that region.

Employees can simply go to the Employee Center search page and look for their remaining paid time-off time. In addition to searching for all kinds of leave balances, the employees can search for information about types of leave. For example, an employee can search for 'how much sick leave do I have left' to see information pertaining to only sick leave.

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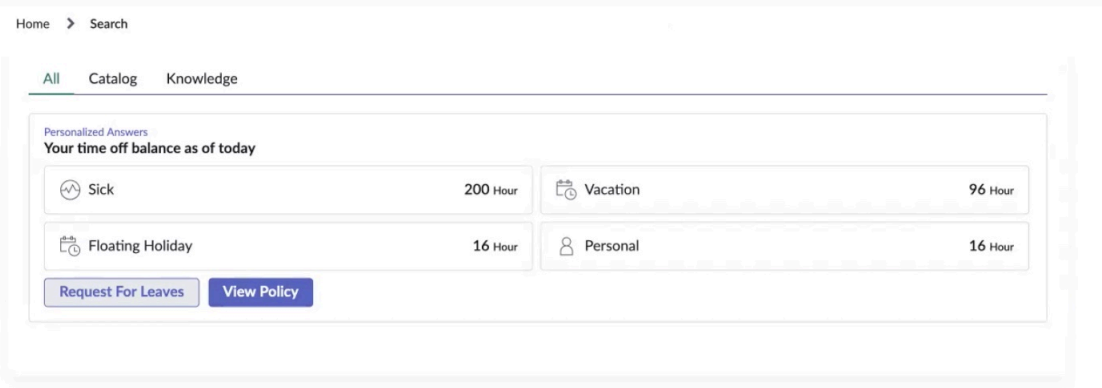
Personalized answer page for leave balance



Employee can quickly scan the remainder of leaves for the year and select **Request For Leaves** to apply for it. **View Policy** is entirely company-specific.

Employee Profile org chart widget

Use the Employee Profile org chart widget to easily browse, search, and navigate through the organization chart.

As an employee, you can do the following:

- Navigate through a visual employee directory of names and title information.
- Learn more about an employee and the org structure by navigating to a detailed employee profile.
- View the other managers of the current user in a pop-up.
- View direct reports and other reports of a user. The total number of reports is displayed on the user card.
- Perform quick actions based on the org chart action group.

For more information on widget instance options, see Organization chart in Employee Center Pro and Modify the org chart widget display.

RTL support for Employee Center

As an employee, you can change the display of the user interface from right-to-left.

Based on your language preferences, the entire hierarchy of existing infrastructure for styling left-to-right languages—the theme, page, widget, and widget instance SCSS—is converted to CSS for right-to-left languages.

- When the session language is a right-to-left language, for example Hebrew, the direction of the portal user interface displays from right to left.
- The arrow next to View Org Chart in employee_profile widget, View All in ec_pro_dashboard, employee taxonomy topic widget, and across Employee Center points to left per the RTL format.

For more information, see Enable support for right-to-left languages.

Manage favorites

Mark the content as your favorites and easily access all your favorites.

Before you begin

Role required: Employee

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About this task

Access all your favorites with the new cross- channel favorites section from the portal or from Now Mobile. Use the **My Favorites** list to access your favorite list quickly. Items remain on the Favorites list until you remove them.

You can see the favorites icon ♡ on the following types of pages or sections:

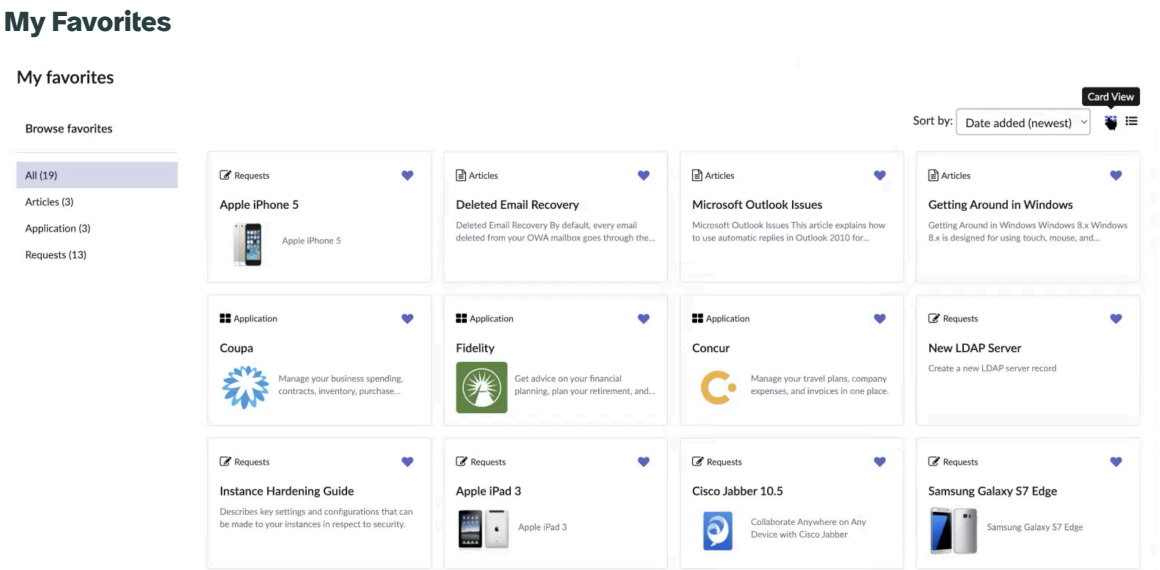
- Topic page
- Catalog page detail view
- Knowledge page detail view
- Cloned catalog page
- My applications page
- My applications widget
- Recommended for you widget

You can add the frequently used content to your favorites list. Click the favorite icon, and the icon color changes. Click the heart icon again remove the item from your favorites.

Note: Favorite list shows the items that you have access.

Procedure

1. Go to **My favorites**.
2. See the list of your favorites by clicking the favorites icon from the header ♥ icon.



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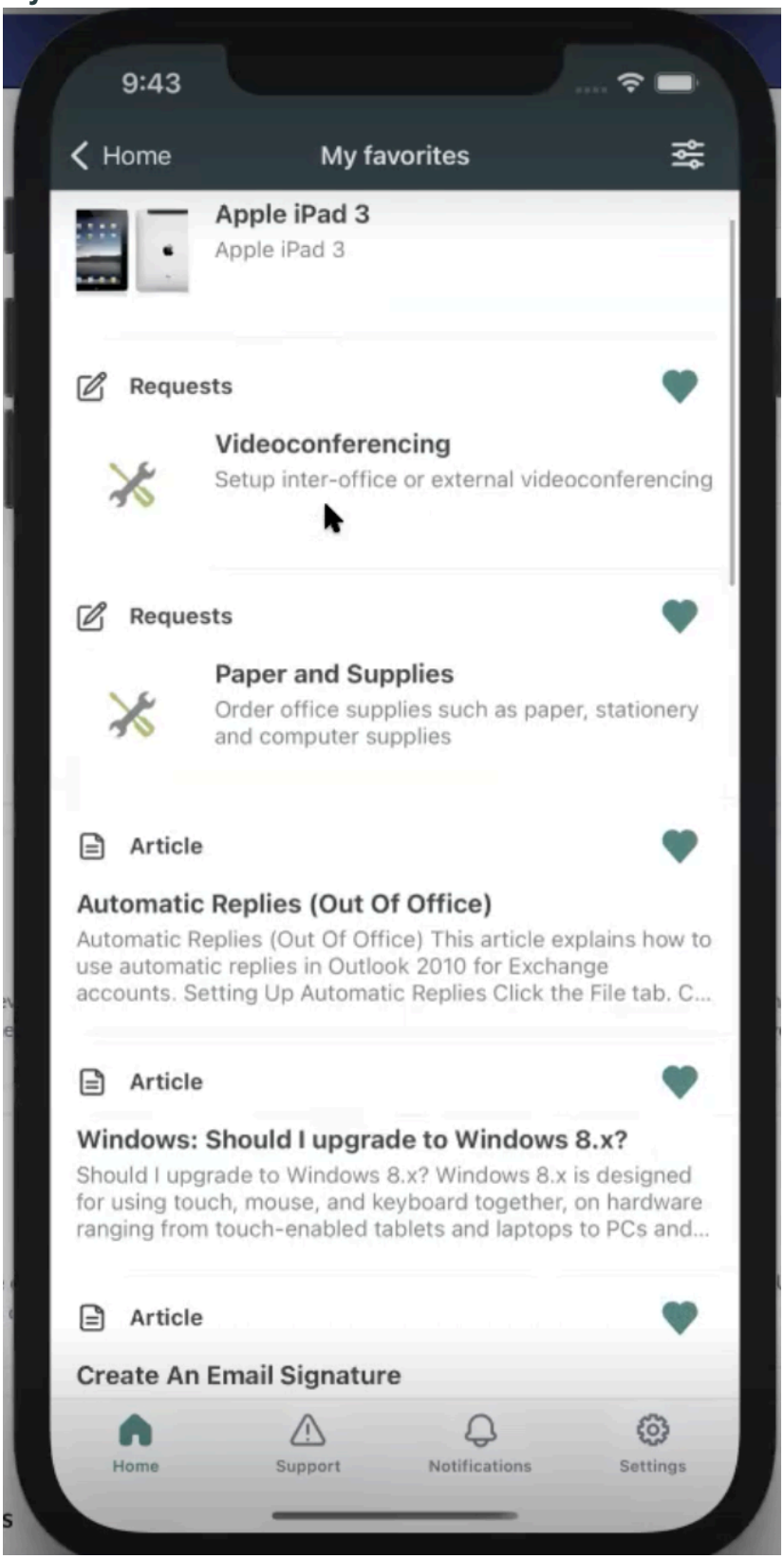
My favorites on Now Mobile home



3. Perform the following actions:
   - Mark content as favorite
   - Remove from favorites

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- View all favorites
- Sort, browse, and filter the favorite list
- View the favorites in grid and list views

Note: You can configure user permissions such as **Available for** and **Not Available for**. When the favorited topic is not marked available, the topic isn't visible from **My Favorites** and on the favorites widget. You can see the following message: `You don't have access to <count> of your favorited items`. For more information, see Enable user criteria for topics.

For more information, see Cross-channel favorites.

Access applications from App Launcher

Access all your applications from a central location in one-click.

As an employee, you can access the custom and third-party app integrations. Navigate to the applications from the associated topics in the Employee Center Pro from **My applications**. Use the **Favorites**, **Categories**, and **Recently opened** options for better usability.

Application launcher

- View and launch all apps that you have permissions to.
- Quickly go to the applications organized into the **Featured**, **Favorites**, **Categories**, and **Recently opened** options.
- Access the topic associated applications from a topic page.
- View applications that are tagged under a category.
- Select applications as favorites.
- Navigate to **View all** for a full list of both SSO and non-SSO applications.

For more information, see App Launcher

Use Guided Self-Service

Use the Guided Self-Service experience to self-serve, leading to improved productivity, and operational efficiencies for the organization.

With an in-context visual way to navigate the complex work scenarios, you can enhance productivity, engagement, and contribute to the overall organizational efficiency.

- Self-serve with easy access to information, processes, and resolutions for day-to-day work.
- Discover and use the available GSS process from the search.
- Navigate to the right article or catalog form through a visual QnA experience.
- Access information, services, and technology intuitively.

As an employee, you can select options, view or modify the choices, restart activities, and start entire playbook all over again. Here is the intuitive step-by-step flow for the use cases.

- Start afresh with context when you return to a partially completed GSS flow.
- Ensure you complete the entire GSS flow in one-go.
- Go back, resume, view, and revise your selections.
- Access a catalog or a KB article based on your permissions.

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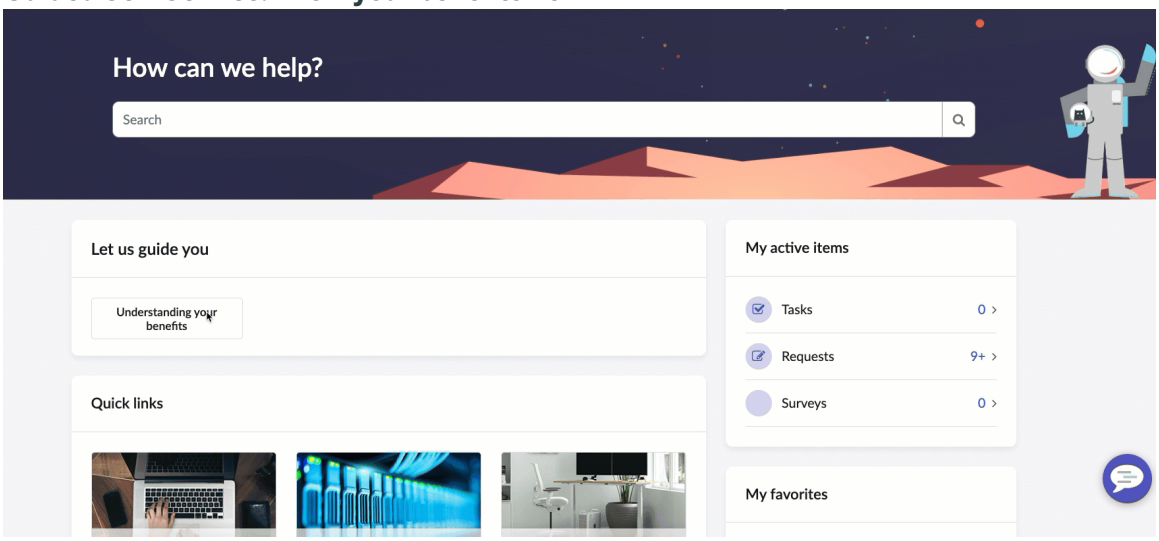
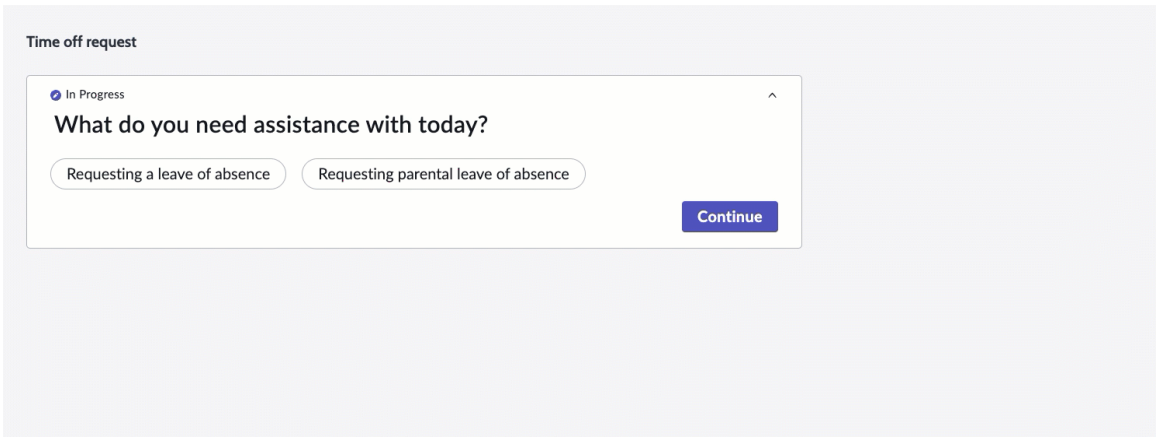
Note: Your incomplete selections are cancelled daily by a schedule job.

Here is the intuitive step-by-step flow for the use cases.

Guided Self-Service: Know your benefits flow



Guided Self-Service Start over



For more information, see Guided Self-Service in Employee Center.

Employee Center reference

Reference topics provide additional information about Employee Center components and forms.

Activity Configuration form

Use the Activity Configuration form to do a basic configuration or an advanced configuration for an activity.

Activity Configuration form

Field	Description
Activity Name	Name of the activity.
Activity navigation	Internal or external resource you want to open when you click an activity. The choices are:

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Activity Configuration form (continued)

Field	Description
	• **Internal** • **External**
Activity portal page	Internal portal page you want to open when you click an activity. This field appears only when **Internal** is selected from **Activity navigation** field.
External URL	URL of the external website you want to open when you click an activity. This field appears only when **External** is selected from **Activity navigation** field.
Application	Application that you want to configure the activity for.
Primary	Option to set the activity as primary. You can set only one activity as primary.
Active	Option to activate the activity for use.
Sort By	How you want to sort the activity. This field is set to **sys_created_on** by default. This field appears only for a basic configuration after you select the **Primary** option.
Sort Order	Order in which you want to sort the activity. The choices are: • **Ascending** • **Descending** This field is set to **Ascending** by default. This field appears only for a basic configuration after you select the **Primary** option.
Icon	Select a suitable icon for the Activity Name field from the available list.
Order	Order in which you want the activity to appear.
Advanced	Option to do an advanced configuration.
Summary view script	Script to read existing configurations and display the count of activities in the Summary view of the My Active Items widget. This field appears only when you select the **Advanced** option.
List view script	Script to read existing configurations and display tasks only for the primary activity. These tasks are shown in the List view of the My Active Items widget. This field appears only when you select the **Advanced** option.

Activity Configuration Detail form

Use the Activity Configuration Detail form to specify which records you want to retrieve from a table when certain conditions are met for a basic activity configuration.

Activity Configuration Detail form

Field	Description
Activity Configuration	Name of the activity configuration.
Target Page	Page that you want to open when you click an activity on the My Active items widget.

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Activity Configuration Detail form (continued)

Field	Description
Activity card mapping	Section to specify what records you want to retrieve from a table and how that information must be displayed. The choices are: • **Basic** • **Scripted**
Table	Table that you want to retrieve the data from.
Application	Application that you want to create the activity configuration for.
Active	Option to activate the activity configuration for use.
Order	Order in which the activity configuration must appear.
Condition	The conditions in which the activity configuration applies. Specify filter conditions on the selected table. A condition includes a field, an operator, and a value. To add conditions, to the right of the fields, click **AND** or **OR**. Delete conditions by clicking the X icon next to the condition.
Basic Card View	Section that displays the fields corresponding to the table that you selected in the **Table** field. Choose how the My Activity widget displays information in the List View by filling in these fields: • **Badge** • **Badge Color** • **Image** • **Title** • **Description** • **Field 1** • **Field 2** • **Action group** When you select **Action group**, you can perform actions right from the my active items section itself. For more information on action groups, see Action framework. This section appears only when **Basic** is selected from the **Activity card mapping** field.
Advanced Card View	In the Card mapping script section, add a JSON script to retrieve records from a table based on the on-screen example. This section appears only when **Scripted** is selected from the **Activity card mapping** field.

Approvals experience reference

Use the following reference information for better approval experience.

Default task configurations

Use the following default task configurations available for approvals.

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- Request with *sysapproval* as reference column and *sc_request* as reference table.
- Requested item with *sysapproval* as reference column and *sc_req_item* as reference table.

You can customize the task configurations to suit your requirements. The data model is an extension to the Employee Center **To-do configuration** as a related list. Follow the instructions Enable task configuration for approvals about configuring the approval experience. For more information on how to configure approvals, see Approvals hub.

Note: A user must have the approval_user or business_stakeholder role to approve IT requests (not applicable to other requests such as HR approvals) on Employee Centre. Role validation has not been implemented in Core UI16 because modifying ACLs in UI16 might have broader implications at the NowPlatform level.

Unable to see Approval todos

Ensure you have the approver_user or business_stakeholder roles to see the approval todos for the **sc_request** or **sc_req_item** items. In the *_getClosureFunction()* method of Script Include todoPageUtils:

```
if (tableName == 'sysapproval_approver') {
 if (!(gs.getUser().hasRole('approver_user') ||
 gs.getUser().hasRole('business_stakeholder'))) {
  var queryString =
 "sysapproval.sys_class_name!=sc_request^sysapproval.sys_class_n
ame!=sc_req_item^NQsysapprovalISEMPTY";
  grTask.addEncodedQuery(queryString);
 }
}
```

Fallback to parent table configuration

When the child table does not have task configuration, fallback is one level above its hierarchy and picks the task configuration of the parent table. When the task parent is not available, fallback is to the default configuration.

SAP Concur reference info

Use the following information for SAP Concur integration.

- All Concur actions are present in **SAP Concur Spoke** (sn_sap_concur_spok) plugin.
- Scheduled job **Pull concur reports** (sysauto_script) is triggered daily. This scheduled job internally calls the **Concur Integration** record from the **Integration Source** table (sn_hr_integr_fw_source) of the ESM framework.
- Schedule job runs and updates the record in the **Concur Sync Details** table (sn_ex_cnc_concur_sync_details) with latest timestamp.
- Concur reports from ServiceNow are synced in the **Concur Expense Report Staging** table (sn_ex_cnc_concur_report_staging).
- Reports from the Staging table are transformed in the **Concur Expense Report** table (sn_ex_cnc_concur_report) by the ESM framework. Use the transformation map **Concur Report Transform Map** in the **Table Transform Map** table (sys_transform_map).
- Approval record is created in the **Pulled Integration To-do** table (sn_hr_integr_fw_todo_inbound) based on the Approver field in the **Concur Expense Report** table.

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Workday reference info

Use the following information for Workday integration.

- Workday uses RAAS reports to send data to external system. For more information on RAAS and field-level info about leaves, timesheets, compensation, job change, job requisition, or leave of absence, see Workday HR Spoke.
- Only the open requests are displayed on the approvers **My tasks** page.
- Approval and rejection actions are performed using an *Integration System User (ISU)*. ISU is a virtual user (and not an actual user) which helps in the safe-keeping of approver credentials. With the use of ISU, approval and rejection records protect the sensitive data according to your configuration in Workday. For example,
  - When John Doe, the approver enters time sheet approved as comment, the comment shown as `John Doe(john.doe@acme.com): Time sheet approved`.
  - When John Doe performs the action `Approve`, a comment is added in Workday as `John Doe (john.doe@acme.com): Action – Approve`.
  - When John Doe performs the action `Reject`, a comment is added in Workday as `John Doe john.doe@acme.com): Action – Reject`.
  - When John Doe performs the action `Reject with a comment-Request is not in compliance with company policy`, two comments are added `John Doe (john.doe@acme.com): Action-Reject John Doe(john.doe@acme.com): Request is not in compliance with company policy`.
- Approve or reject actions are shipped out-of-the-box for all use cases.
- When an approval is delegated from one approver to another in Workday; report data source is not able to handle the delegation change such as delegated task and other delegation details.
- When a request requires a multi-level approval with level 1 approved in Workday and ServiceNow, you may see two entries for the same approval. This is a limitation with the ISU use.
- Attachments support a max limit of 12 MB. Ensure the attachment size is below 12 MB.
- Use the following scripts:
  - WorkdayApprovalToDosClientUtilSNC: Retrieves records for the purge process in Workday approvals.
  - WorkdayApprovalToDosHelperSNC: Contains constants related to Workday approvals.
  - WorkdayApprovalToDosClientUtil: Extends WorkdayApprovalToDosClientUtilSNC and allows users to define custom code.
  - WorkdayApprovalToDosHelperUtils: Extends WorkdayApprovalToDosHelperUtilsSNC and enables users to define custom code.
  - WorkdayApprovalToDosHelperUtilsSNC: Provides functions for Workday approvals.
- Ensure you configure the right user controls and privileges for Compensation Change and Spend Authorization use cases. Only the authorized users can view the sensitive records and data from Workday.
- For data protection, use the default purge policy to delete data more often. By default, data purge happens after in 30 days.
- Ensure only the HR administrator [sn_hr_core.admin] has access to the sensitive information as explained in Remove HR Administrator role from IT System Administrators.

For more information on how to configure approvals, see Approvals hub.

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Approvals on mobile

Only approvals that are in **sysapproval_approver** table are shown using the generic card in Now Mobile.

To disable the feature change the value of this sys_property: sn_me_todos.all_approvals_mobile_enabled to false.

OOTB action group use

Use the out-of-the-box **Approvals action group** to display the actions such as **Approve** and **Reject**. For more information, see Action framework.

Note: For actions to appear in my items widget, you can add the OOTB **Approvals action group** from **All** > **Employee Center** > **Administration** > **To-dos Configurations**, click an existing to-dos configuration, navigate to the **To-do Configuration Details** record, and use the OOTB action group under **Fields Mapping**.

Additional information

- Click the URLs for additional information and context.
- Allow BUs to add non-task tables easily to the list in the To-dos or Task configuration reference tables by passing non-task tables as an array in the *`Scripted Extension Points`*. *`sn_hr_sp.TodoNonTaskTables`*, and *`sn_ex_sp.RefNonTaskTables`*.

Connected Content form

Use the connected content form to associate content to the topics in your taxonomy.

Connected Content form

Field	Description
Content Type	The type of content you want to associate with a topic. The choices are: • **Catalog Item** • **Knowledge** • **Quick Link**
Catalog item	The catalog item you want to associate with the topic. This field appears only when **Catalog Item** is selected from **Content Type** field.
Knowledge	The knowledge article you want to associate with the topic. This field appears only when **Knowledge** is selected from **Content Type** field.
Quick link	The quick link you want to associate with the topic. This field appears only when **Quick Link** is selected from **Content Type** field.
Topic	The topic that you want to associate the content with.

Default Employee Profile Header Configuration record

The default Employee Profile header configuration record contains the following field values.

Default Employee Profile Header Configuration field values

Field	Value
Name	Default

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Default Employee Profile Header Configuration field values (continued)

Field	Value
Show Pronoun	Selected
Edit Images	Cleared
Disable Links	Selected
Default	Selected
Background Image	Selected
Actions	Employee Profile Group

Primary User Info

Field	Description
Choose Username Format	FirstName, LastName

Secondary User Info

Field	Description
Fields	user.title,user.department,user.email

User Presence Info

Channel	Microsoft Teams
Show Presence Status	Selected

Employee Center widgets

You can use base system widgets as-is in the portal or clone them to suit your own business needs.

This section provides a quick overview of the widgets. To see the full list of widgets, you can navigate to **All** > **Service Portal** > **Widgets**.

Employee Center widgets

List of widgets

Widgets	Benefits	Roles/User Criteria
Curated Experiences	Provides dynamic employee-centric browse experience based on a unified taxonomy across all content types: • **Employee Taxonomy**: The base system employee-centric taxonomy that organizations can use as a starting point. • **Mega Menu Widget**: The top navigation bar for employees to browse all available topics.	admin

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List of widgets (continued)

Widgets	Benefits	Roles/User Criteria
	• **Popular Topics Widget**: The most popular topics highlighted across all organizations. • **Dynamic Topic Pages**: The dedicated and dynamically created page for accessing all content associated with the topic.	
Employee Profile Page	Provides the employee-centric taxonomy that organizations can use as a starting point.	sn_employee.admin
Favorites Page	Provides quick access to all favorite items. Opens in a separate page, where you can manage all your favorite content.	admin
Footer Widget	Allows for more scalability and configuration options.	admin, sp_admin
Modern Portal Theme	Provides consistency across all the portal pages.	admin
My Active Items Widget	Provides a consolidated view into all the tasks and to-dos assigned to the employee. It is designed to be configured and extended to additional tasks.	admin, sp_admin, esc_admin
Quick Links Widget	Provides quick access to all the important content and pages (internal and external).	sp_admin, user_criteria_admin, Taxonomy Manager
Recommended for you widget	Highlights the most relevant content for the employee. It is based on popularity or ML-algorithm (if entitled for Predictive Intelligence capabilities) that looks at similarity in employee profile to show popular content.	admin, sp_admin

Employee Profile form

An option in the Employee Profile configuration that provides a list of employee profile fields.

The following list of configurable fields indicates the personal, sensitive, and employment information.

- Employee number
- Employment end date
- Employment start date
- Nickname
- Legal name
- Preferred pronoun
- Short bio
- Work mobile phone

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- Work phone
- Location
- Location type
- Position
- Position type
- Background banner
- Created by
- Created
- Sys ID
- Updates (Integer)
- Updated by (String)
- Updated (Date/Time)
- User Work phone

For HR profile field configuration, see HR profile editable field configuration.

Related topics

Employee profile

Employee Profile Header Configuration form

Use the Employee Profile Header Configuration form to create a header for a profile.

Employee Profile Header Configuration form

Field	Description
Name	Default name or any other name.
Show Pronouns	Option to display user pronouns.
Edit Images	Option to enable employees to edit the avatar and background image.
Disable Links	Option to disable links in the header.
Background Image	Option to enable the background image.
Action Groups	Record of the action group to be added in the header.

Primary User Info

Field	Description
Choose Username Format	Format in which the primary user information is to be displayed. Available options: • FirstName, LastName • LastName, FirstName • FirstName, MiddleName, LastName

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Secondary User Info

Field	Description
Fields	List of fields to be selected from the list of available options. A maximum of three fields can be selected.

User Presence Info

Field	Description
Channel	List of available channels.
Show Presence Status	Option to show the user presence status for the selected channel.

Employee Profile portal configuration form

Use the Employee Profile Portal Configuration form to configure the profile for a service portal.

Employee Profile Portal Configuration form

Field	Description
Name	Name of the profile configuration. For navigation and other information, see Employee Profile portal configuration form, Employee Profile upgrade scenarios, Employee Profile Header Configuration form, and Employee Profile form
Active	Option to make the profile configuration active.
Portal	Portal on which the configuration is applied.
Widget Overview Panel	Option to enable the overview panel on the profile.
Order	Order number of the profile in the portal.
Header Configuration	Header that is to be displayed on the profile.

Employee Profile upgrade scenarios

After upgrading Employee Profile to version 11.0.3, the profile pages on all portals are updated based on the following scenarios.

Upgrade scenarios for Employee Profile

Portal	Upgrade Scenario
Employee Center	• All active tabs are associated with the profile page. • The widget overview panel is visible. **Note:** To disable the widget overview panel, you must create a profile portal configuration. For more information, see Configure Employee Profile for a portal.

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Upgrade scenarios for Employee Profile (continued)

Portal	Upgrade Scenario

	• If an Employee Profile header configuration record doesn't exist, the default record is used.
	• If an Employee Profile header configuration record exists, it's updated with the following fields and values:
	  ○ Action Groups: Filled from the widget instance options
	  ○ Background Image: Selected
	  ○ Edit Images: Selected
	  ○ Disable Links: Cleared

Custom portal	• All tabs are associated and visible on the profile page.
	• The widget overview panel is visible.
	• If an Employee Profile header configuration record doesn't exist, the default record is used.
	• If an Employee Profile header configuration record exists, it's updated with the following fields and values:
	  ○ Action Groups: Filled from the widget instance options
	  ○ Background Image: Selected
	  ○ Edit Images: Selected
	  ○ Disable Links: Cleared

Enhanced Requests Experience forms

The forms provide information to set up the Enhanced Requests Experience.

Request source form

The field descriptions provide a reference point when you're creating a request source.

Request source form

Field	Description
Title	Title of the request source to understand the type.
Description	Short description of the request source.
Table	Source table for the request type.
Application	Scope of the request source

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Request source form (continued)

Field	Description
All portals	Option to apply the request source to all your portals.
Filter	**Add filter condition**: Add a filter condition to the request source.
	Add OR Clause: Add an OR clause to the filter condition.
	Add Sort: Add a sorting clause to the filter condition.
Advanced	Option to enable scripting to customize the request card configurations on the portal.
Script	Scripting field to customize the request card configurations on the portal. This section appears only when **Advanced** box is checked.
Title field	Title of the request shown on the request card in the portal.
Description field	Description type to be shown on the request card in the portal. **Note:** The maximum number of description type supported is two.
Portal page	Page where you are redirected when you click on the request card in the portal.

Request filter definition form

The field descriptions provide a reference point when you're creating a Requests filter definition.

Request filter definition

Field	Description
Name	Name of the view filter that shows up in the portal within the multi-tab interface.
Description	Short description for the filter definition record.
All portals	Option to enable the filter definition in all your portals.
Render as view	Option to render the filter definition for all your portals. **Note:** The **Render as view** check box throws an error when there are different filter definitions already selected for different applications using the **All portal** check box.
Application	Application scope where the filter definition record resides.
Active	Option to enable the filter definition.
Order	Order of priority to determine which filter definition to prioritize.
Available for	Option to add the users the filter definition is available for.
Not available for	Option to choose any audience if they should be excluded from accessing the filter definition.
Filter type	Type of filter you can use on the tab you're configuring with the view filter for the My Requests page. The two types available are: **Choice**: Choice of selecting one or more filter options on the My Requests tab.

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Request filter definition (continued)

Field	Description
	Note: You must select the **Filter condition** for each **Filter type** you create. **Reference**: Point of reference to select as a filter option, like location.
Filter type	**Reference table**: The record table for the point of reference selected, like location. This field appears only when **Reference** is selected from **Filter type**.
Filter type	**Reference conditions**: Option to add second-level filter conditions for the reference filter, like location. This section appears only when **Reference** is selected from **Filter type**.
Filter type	**Search field**: Label of the reference filter type visible on the Requests page.
Multi-Select	Option to enable multiple selections for **Choice Filter type**.
Request filter configurations	Sub-filters configured under the filter option.
Associated Tabs	Tabs associated to the filter.

Request filter configuration form

The field descriptions provide a reference point when you're creating a Requests filter configuration.

Filter configuration form

Field	Description
Label	Name of the filter visible on the Requests page.
Request filter definition	Filter definition under which this filter is being configured.
Application	Application scope where the filter record resides.
Active	Option to enable the filter configuration.
Order	Order of priority to determine which filter configuration to prioritize.
Apply on load	Option to enable the filter on the Requests page even when it is reloaded.
Available for	Option to add the users the filter configuration is available for.
Not available for	Option to choose any audience if they should be excluded from accessing the filter on the Requests page.
Reference table	Source table for the reference filter, like location. This field appears only when **Reference** is selected from the **Filter type** in the filter definition.
Reference condition	Conditional suggestion like **Add Filter Condition**, **Add OR Clause**, and **Add Sort** to add to the filters.

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Filter configuration form (continued)

Field	Description
	This field appears only when **Reference** is selected from the **Filter type** in the filter definition.
Search field	Specifics of the selected reference filter column item to be displayed on the portal page. For example, if **Location** is the filter column item, you can select **City** or **Country** on the **Search field**.
Associated Filters	List of filters associated with the tab.

Request filter condition form

The field descriptions provide a reference point when you're creating a Requests filter definition.

Filter condition form

Field	Description
Table	Record table from where the filter condition options are sourced.
Filter config	Filter configuration under which the filter condition is being created.
Application	Application scope where the filter condition record resides.
Active	Option to enable the filter condition.
Filter	**Add filter condition**: Add a filter condition.
	Add OR Clause: Add an OR clause to the filter condition.
	Add Sort: Add a sorting clause to the filter condition.

External Link form

Use the External Link form to create an external link.

External Link form

Field	Description
Title	Title for the external link.
Short description	Short description for the external link.
URL	URL of the external link; for more information, seeCreate an external link

Featured Content form

Use the featured content form to mark the associated connected content as featured content for a topic.

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Featured Content form

Field	Description
Connected Content	Connected content associated with the topic. Search for and select the connected content associated with the topic. **Note:** You can't add a quick link as a featured item.
Topic	Topic in which you want the featured content to appear.
Order	Order in which you want the featured content to appear.

Footer form

Use the Footer form to create a new footer that you want to appear in the Employee Center or Employee Center Pro.

Footer form

Field	Description
Name	Name of the footer.
Portal	The portal that you want to associate this footer with.
Logo	The logo of your company that you want to appear in the footer.
Organization Content	Information about your company that you want to appear in the footer.
Copyright	The copyright information to appear in the footer.
Active	Option to activate this footer for use.

Footer Menus form

Use the Footer Menus form to create a new footer menu that you want to appear on your Employee Center or Employee Center Pro.

Footer Menus form

Field	Description
Footer	The name of the footer that you want to create menus for.
Menu	The main category under which you want the footer links displayed.
Link Type	How you want the links on the menu to appear in the footer on the Employee Center. Select any of the following options: • **Navigation Links**: Displays links at the top of the footer. You can add links that let you navigate to different information resources and pages. • **Bottom Links**: Displays links at the bottom of the footer. You can add links to information such as, terms and conditions, privacy statement, and so on. • **Social Icons**: Displays social media icons, such as Twitter, Facebook, and LinkedIn.
Order	The order in which you want the menu to appear in the footer.

Guided Self-Service reference

Use the following reference information for the Guided Self-Service functionality.

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Guided Self-Service: Things to remember

You can display Guided Self-Service as a widget on the home page or as a quick link or as a widget on topic pages. Remember the following information:

- Ensure that the **sn_hr_sp.esc_admin** user has the **playbook.write** role to edit the playbook design and **playbook_experience.admin** to preview the guided experience.
- Only when the playbook and guided help process are in an active state, the guided help process appears on the Employee Center.
- Guided Self-Service can't be created from the playbook page directly, create the process from the GSS form, see Configure Guided Self-Service.
- Guided Self-Service flow is a single-stage flow.
- The Activity Definition [sys_pd_activity_definition] table lists the definitions for the activities that you can add to a playbook in **Workflow Studio**.

  To access the activity definitions, navigate to **Process Automation** > **Process Automation Administration** > **Activity Definitions**

- State management of your choices in an activity is retained for 24 hours only.
- When a guided process activity is partially completed or aborted mid-way, you can resume and complete the rest of the process within 24 hours.
- Currently, the option to restart the activity or change the selections isn't supported after 24 hours. The process restarts afresh.
- The completed self-service is purged after 30 days with the auto-flush schedule available from sys_trigger_list.
- The `Cancel incomplete guided help playbook` scheduled job for the automatic cancellation of incomplete guidance is only available for admin.
- Deleting the GSS process from `sn_ex_sp_gd_help_process` doesn't delete the process from `sys_pd_process_definition`.

Related topics

Use Guided Self-Service

Menu Item form

Use the Menu Items form to configure the items for the **More** menu on the Employee Center header.

Add any new menu items to the EC Header under the **More** option.

Note: Currently, Filtered or Scripted menu items are not supported as Filtered or Scripted List must be top-level Menu Item.

More Items form

Field	Description
Label	Name that appears for the item in the menu.
Parent Menu	This field should already contain the name of the menu you are adding items to.
Type	The type of page the item links to. For example, you can link to another page in the portal or an external URL. Form fields vary depending on the option you select from this list.

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More Items form (continued)

Field	Description
	• **Page** • **URL** • **Service Catalog** • **Catalog Category** • **Catalog Item** • **Knowledge Base** • **KB Topic** • **KB Article** • **KB Category** • **Filtered List** • **Scripted List**
Application	Application for the menu item
Order	Value that determines where the item appears in the menu in relation to other menu items.
HREF/URL	
URL target	Name of the portal page the item links to.
Condition	Determines what conditions are required for menu items to show in the header.
Glyph	Icon that appears next to the menu item.

Overview section form

The overview section form enables you to configure a section on the Employee Profile UI.

Overview Section form

Field	Description
Name	Unique name that identifies the section. For example, About and Personal information.
Layout	Layout determines how the section content is displayed: • Single Column: Displays the content in a single column layout. • Two Column: Displays the content in a two-column layout.
Hide section name	Display settings for the section name.
Application	Domain to which the section belongs to.
Order	Order in which the section is displayed.
Active	Option that indicates if the section content is active or not.
Section visibility	Visibility settings for the section:

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Overview Section form (continued)

Field	Description
	• Mobile only • Desktop only • Desktop and mobile

Portal notification configuration form

The portal notification configurations form enables you to create a unified notification system for your preferred portal.

Notification setup form

Field	Description
Name	Name of the configuration for identification. The name, ideally, should include the name of the portal that is being configured.
Portal	Portal where the unified notification is being configured.
Order	Order of priority for the record.
Active	Option to enable the configuration.
Tray configuration	Enable bell icon: Option to enable the bell icon on the portal.
Tray configuration	Show notifications count: Option to enable view of the number of notifications accumulated, on the bell icon.
Tray configuration	Show unread count: Option to enable view of the unread notifications count.
Tray configuration	Tray actions: **Mark all as read** option to add to the global utility ellipses panel.
Tray configuration	Standard filters: Types of default filters. • Critical: Marks the notification as critical. • Reminder: Sends a reminder notification.
Tray configuration	Notification classification filters: Types of filter classifications available in notifications. • Comment: Sends a notification when a comment is added. • Request: Sends a notification when a request is created or updated. • Task: Sends a notification when a task is created or updated.
Card configuration	Card actions: Types of card actions available for notifications.

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Notification setup form (continued)

Field	Description
	• Mark as read: Marks all notifications read. • Remind me: Sends a reminder notification. • Clear notification: Clears all notifications.

Portal notification content form

The field descriptions provided here are required to configure your portal notification messages.

Portal notification content form

Field	Description
Name	Name for the notification content record.
Notification	Type of notification content.
Portals	Portals where the notifications show up.
Table	Record table for the notification type. This field is automatically set to the record table depending on the **Notification** type selected.
Active	Option to enable the notification content configuration.
Advance	Option to enable support for dynamic content templates and grouping of unseen notifications.
Content Configuration	Content template: Display message for the notification. The field supports variable data by setting and using different parameters.
Content Configuration	Content params: Parameters used to provide notification messages with variable data.
Content Configuration	Action url: URL that redirects to the record table of each notification type.
Icon Configuration	User custom icon: Option to enable customized icon for portal notifications.
Icon Configuration	Custom icon: Customizable icon for different notification content types. This section appears only when **User custom icon** is enabled.
Icon Configuration	Icon: List of icons to set for different notification content types.
Icon Configuration	Invert icon color: Option to enable invert icon color.
Icon Configuration	Icon background: Background colors for the notification icons.

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Trigger conditions form

The field descriptions provided here are essential to create the trigger conditions for your portal notification messages.

Notifications trigger conditions

Field	Description
Name	Given name for the trigger condition record.
Category	Category of notification for which the trigger is set.
Application	Scope of the application where the trigger condition record resides.
Active	Option to enable the trigger conditions set.
When to send	Trigger: Type of trigger that can be set. • Record Change: Triggers a notification message each time there's a change or update of records in the notifications table. • Event: Triggers a notification message when a particular event type is created.
When to send	Inserted: Option to enable notification triggering on the insertion of a new record.
When to send	Updated: Option to enable notification triggering on updating a record.
When to send	Table: Record table selected for which the trigger is set.
When to send	Conditions: Conditions to set off the trigger. • Add Filter Condition: Field where the trigger conditions are added. • Add OR Clause: Field to add an optional clause for the trigger condition. This field appears only when a record table is selected from the **Table** field.
When to send	Advanced condition: Advanced condition script to send a notification based on the current email address, change in the field values, or the system properties.
Who will receive	Users: Admin users to be added to the trigger conditions record.
Who will receive	Recipients listed in fields: Viewers to be added to the trigger conditions record.
Who will receive	Include the person whose action triggered the notification: Option to include the trigger-person for the notification in the list of recipients.

Quick Link form

Use the Quick Link form to create a new quick link and specify the content type for the quick link.

Quick Link form

Field	Description
Content Type	The type of content that you want the quick link to display. The choices are:

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Quick Link form (continued)

Field	Description
	• **Knowledge** • **Catalog item** • **Page** • **External link** • **Guided Self-service**
Name	The name of the quick link.
Knowledge	Knowledge article you want to open when you click the quick link. This field appears only when **Knowledge** is selected from **Content Type** field.
Catalog item	Catalog item that you want to open when you click the quick link. This field appears only when **Catalog item** is selected from **Content Type** field.
Page	Page you want to open when you click the quick link. This field appears only when **Page** is selected from **Content Type** field.
Additional query parameters	For the page that you selected in the **Page** field, you can specify additional query parameters here. This field appears only when **Page** is selected from **Content Type** field.
External link	External link you want to open when you click the quick link. This field appears only when **External** is selected from **Content Type** field. The background image for quick link is now visible to external users.
Guided Self-service	Guided Self-service that you want to open when you click the quick link. This field appears only when **Guided Self-service** is selected from **Content Type** field.
Active	Option to activate the quick link for use.
Title	The title that you enter in this field overrides the default title of the quick link.
Short description	The short description that you enter in this field overrides the default short description of the quick link.
Background image	The background image for the quick link.
Icon	The icon for the quick link.
Domain	The application scope on which the functionality runs.

Related topics

Create a quick link

Tab widget mapping form

You can use the tab widget mapping form to display widgets on a tab and control their visibility.

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Tab widget mapping form

Field	Description
Name	Name of the widget-mapping record that is available in the **widgetTitle** variable of the widget options object. Use this variable value as the widget title.
Application	Application of the tab. For example, you can select one of the applications such as **Employee Center Pro** or **Employee Center Pro Kiosk**.
Active	Option to activate the widget in the tab.
Order	Order number in which you want the widget to appear on the tab.
Tab	Unique name of the tab that you want to associate with.

Accessible by	Users who can view the widgets.
	• Employee only
	• Manager only
	• Employee and manager
	• Everyone
	• Manager and Other Managers
	• Employee, Manager, and Other Managers
	• User criteria: Provide the access only to specific users, groups, and roles with the user criteria. The widget is visible to the users based on the following:
	  ○ Available For: User group for whom the widget is visible. Define and select the user group based on your business needs.
	  ○ Not Available For: User group for whom the widget isn't visible. Define and select the user group based on your business needs.
	Values that are defined in the Not Available For group take precedence over the values defined in the Available For group. If both aren't defined, the widget is visible to all users. For more information on widget visibility based on user criteria, see User Criteria output.
	Note: Use the user criteria cautiously because the profile page load time can take longer based on your criteria.
	Based on your selection, the profile visibility is either locked or made available for editing by the employee.

Allow employee to control visibility	This field appears only when you select one of the Employee only, Employee and manager, or Everyone options. **Note:** To view and change the visibility setting, embed the *Public Profile Visibility* widget inside the configured widget.

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Tab widget mapping form (continued)

Field	Description
	When you select the value as **true**, employees can see the edit option used to modify the visibility settings. The modified visibility setting *(employee_profile.widget_visibility)* is stored in the user preference table. **Note:** Settings configured in the **Allow employee to control visibility** field take precedence over the settings configured in the **Accessible by** field to display the information. Employees can change the admin configuration and determine how much of the profile information is visible to the public. Here's a sample code for invoking the Public Profile Visibility widget. `data.publicProfileWidget = $sp.getWidget("public_profile_visibility", { tabWidgetMappingId: options.tabWidgetMappingId ? options.tabWidgetMappingId : "", isUserSelectionEnabled: options.isUserSelectionEnabled ? options.isUserSelectionEnabled : "", widgetTitle: options.widgetTitle ? options.widgetTitle : “” });`  `To embed it in your widget use the sp-widget directive. For example, <sp-widget widget="data.publicProfileWidget"></sp-widget>` This field value is available in the **isUserSelectionEnabled** variable of the widget options object.
Widget	Widget to display on the tab. **Note:** Only when you map a widget to the tab, the information displays inside the tab on the employee profile page. When the widget is visible on the UI, set the *isVisible* variable value to **true** in the server script data object to indicate the widget visibility. For example, *data.isVisible = true*. For optimal tab load time, use a max of seven associated widgets, which can take 250 ms or equivalent. **Note:** If the widget type is Employee Profile Overview, you can select the set of sections to be displayed under this widget.
Widget parameters	Comma-separated list of widget parameters auto-populated with default values.

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Tab widget mapping form (continued)

Field	Description
	For the **Employee Schedule** widget, to send Email or SMS, specify the widget parameters `enable_send_email` and `enable_send_sms` values to true. For more information, see Configure the mail and SMS send to self. For default calendar view, specify `default_calendar_view` value to day or week or month.

Related topics

Manage profile tabs and visibility in Employee Profile

Taxonomy form

Use the taxonomy form to create your own taxonomy for the Employee Center portal.

Taxonomy form

Field	Description
Name	Unique name that identifies the taxonomy.
Managers	Managers or manager group of the taxonomy content.
Application	Application scope that the taxonomy belongs to. For example, Employee Center Pro or Employee Center Pro Kiosk.
Active	Indicates if the taxonomy content is active or not.
Domain	Domain the taxonomy content belongs to.
Description	Description of the taxonomy content.

Related topics

Unified Taxonomy for Employee Center

Topic form

Use the topic form to create topics for the new or cloned taxonomy.

Topic form

Field	Description
Name	Name for the topic. **Note:** For better topic discovery and search results, avoid special character **/** and ensure you re-index the content after topic name edits. Ensure that the topic table changes are manually reindexed for their corresponding indexed sources, see Create and associate topics.
Taxonomy	Taxonomy with which you want to associate the topic.

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Topic form (continued)

Field	Description
	For example, Employee Center Pro or Employee Center Pro Kiosk.
Template	Name of the topic template. Available options are **emp_taxonomy_topic** (for EC portal) and **eck_taxonomy_topic** (for kiosk).
Parent topic	Parent topic with which you want to associate this topic. Leave this field blank if the topic you're creating is the parent topic. **Note:** When you clone or move a topic, the associated guided self-service also is cloned or moved accordingly.
Application	This field is set to Employee Center by default.
Active	Option to make the topic available for use.
Apply template to child topics	Option to apply the parent topic template on the child topics.
Order	Order in which you want the topic to appear.
Description	Brief description of the topic.
Icon	Icon that you want to display for the topic. Click the **Click to add** option to browse and select an image you want to set as the topic icon. Supported file types include .jpg, .png, .bmp, .gif, .jpeg, .ico, and .svg. The recommended size for icons is: • Topic icon: 56 x 56px • Sub-topic icon: 28 x28px Use the default icons that align with the EC theme such as Coral.
Banner Image	Banner that you want to display for the topic. Click **Click to add...** to browse and select an image you want to set as the topic banner. Supported file types include .jpg, .png, .bmp, .gif, .jpeg, .ico, and .svg. The recommended size for banners is: • Home page banner: 1440 x 400px • Topic page: 1258 x 300px
Topic manager	Names of the topic managers with access to the topic.
Topic contributor	Names of the topic contributors with access to the topic.
Enable user criteria check	When you opt in, you can select the user criteria for the topic visibility. Enable user criteria check to determine visibility of current topic and its child topics in navigation and popular topics widget. The criteria set also applies to child topics. Criteria in connected content still govern content visibility on topic pages.

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Topic form (continued)

Field	Description
	Note: When you have a lot of topics, ensure you set up user criteria for your topics. Default: Disable For more information, see Enable user criteria for topics.
Available For	User group for whom the topic is visible. Ensure you specify the user criteria to make topics available for specific users and user groups. **Note:** When you do not specify any values for both **Available For** and **Not Available For**, the topics do not appear. This field is available when the **Enable user criteria check** is selected.
Not Available For	User group for whom the topic isn't visible. Ensure you specify the user criteria to make topics unavailable for specific users and user groups. **Note:** When you do not specify any values for both **Available For** and **Not Available For**, the topics do not appear. This field is available when the **Enable user criteria check** is selected.

Related topics

Create and associate topics

User Criteria form

Add a user criteria record to decide which users, roles, and groups can access a quick link.

User Criteria form

Field	Description
Name	Name of the user criteria.
Users	Users who can access the quick link when you apply the user criteria. Click the Unlock users icon to select users. Click the Add me icon to add yourself as a user. Click the Add email address icon to add a user's email address.
Groups	Groups who can access the quick link when you apply the user criteria. Click the Unlock Groups icon to select the groups. **Note:** Use Groups instead of the Advanced user criteria to get your data cached.
Roles	Roles who can access the quick link when you apply the user criteria. Click the Unlock Roles icon to select the roles.
Advanced	Option to create a script for the user criteria. **Note:** Use Groups instead of the Advanced user criteria to get your data cached.

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User Criteria form (continued)

Field	Description
Application	This field is automatically set to Employee Center.
Active	Option to activate this user criteria for use.
Companies	Companies who can access the quick link when you apply the user criteria. Click the Unlock Companies icon to select the companies.
Locations	Locations which can access the quick link when you apply the user criteria. Click the Unlock Locations icon to select the locations.
Departments	Departments who can access the quick link when you apply the user criteria. Click the Unlock Departments icon to select the departments.
Match All	Option to make every condition required when the user criteria is applied. The conditions are set in the previous fields, such as Companies, Locations, Departments, and so on.

User Criteria output

User Criteria output based on **Available For** and **Not Available For** values.

User Criteria output

Available For	Not Available For	Result
Not defined	Not defined	Accessible to all users.
Not defined	Defined	Accessible to all users except the users falling under **Not Available For** criteria.
Defined	Not defined	Accessible only to the users falling under **Available For** criteria.
Defined	Defined	Accessible only to the users falling under **Available For** criteria.
Defined	Defined (with some users falling under **Available For** criteria)	Accessible to all users falling under **Available For** criteria and not falling under **Not Available For** criteria.

Schedule appointment form

Use the Schedule appointment form to select a reason and provide contact information for your appointment.

Schedule appointment form

Field	Description
Appointment category	Category for the appointment. As an admin, you can enable this field from the instance options. **Note:** The category might already be selected based on your entry point.

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Schedule appointment form (continued)

Field	Description
Appointment reason	Reason for scheduling the appointment. You might have to select a category before selecting a reason based on the configuration set by the admin. **Note:** The reason might already be selected based on your entry point.
Appointment type	Type of appointment that you want to schedule. The selected appointment reason might support only virtual or in-person appointments based on the configuration set by the admin.
Appointment location	Office location for your appointment. You might not be able to select a location if you've reached the maximum number of appointments.
Appointment	Time slot for your appointment.
Preferred contact method	Contact method that is used to send notifications related to the appointment.
Contact detail	Phone number or email that receives the notifications related to the appointment.

Location Consent form

The location consent form helps you configure the communication channels for appointment bookings.

Location Consent form

Field	Description
Name	Name of the configuration record.
Description	Description of the configuration record.
Application	Application scope of the configuration record. This field is automatically set to the application scope of your instance.
Domain	Domain for the communication configuration.
Show communication method	Option to enable the communication method on the appointment booking form.
Update my profile	Option to allow users to update their profile with the appointment booking communication details.

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Location Consent form (continued)

Field	Description
Add comment	Option to allow users to provide comments on the appointment booking form.
Ask for consent	Option to ask for communication consent from the users.
Table	Table that is used for the phone number and email fields for the user.
User reference field	Table field that is used to reference the user record.
Phone number field	Table field that is used for the user's phone number.
Email field	Table field that is used for the user's email address.

Website configuration form

The field descriptions provide a point of reference when you're configuring the Browser Extension for Employee Center for a website.

Website for Browser extension

Field	Description
Site name	Name of the website.
Parent website	Parent website helps with the logical grouping of certain related websites.
Enable resources search	AI search results, if applicable.
Site URL	URL of the website being configured.
Active	Option to enable the Browser Extension configuration for the website.
Apps Associated	List of active applications to be associated with access from the website through the Browser Extension. **Note:** Applications can also be added to the configured website from the **Associated Websites** tab on the application page.
Quick links Associated	List of quick links from the portal to be associated with access from the website through the Browser Extension. **Note:** Quick links can also be added to the configured website from the **Associated Websites** tab on the quick links page.
Topics Associated	List of topic pages from the portal to be associated with access from the website through the Browser Extension.

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Website for Browser extension (continued)

Field	Description
	Note: Topic pages can also be added to the configured website from the **Associated Websites** tab on the specific topic page.
Contents Associated	List of connected content from the portal to be associated with access from the website through the Browser Extension. **Note:** Content can also be added to the configured website from the **Associated Websites** tab on the specific content page.

Employee Center for IT Service Management

Employee Center for IT Service Management (ITSM) helps you improve the self-service capabilities and perform diverse admin and service management tasks from a dynamic unified employee portal.

Employee Center functionalities for IT Service Management



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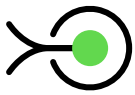
Get started

Explore	Configure	Use
		
Employee Center with the IT Service Management suite enhances the service experience leveraging a unified portal environment.	Configure Employee Center for ITSM to enhance your portal experience and enhance your service delivery.	Use Employee Center to enhance the IT Service Management experience for both admins and employees.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Employee Center for ITSM

Empower users with the operational efficiencies gained from greater self-service, actionable communications, and unified experiences.

Employee Center for ITSM overview

Experience more simplified user interface to deflect simple cases with recommendations and self-service. Spend your time on more complex issues that improves the overall ITSM portal experience.

Service management is also easier with the Rich Content Editor and the Unified Browse Experience functionalities to see all content types in one place.

Employee Center for ITSM users

Users

User	Description
ITSM admins	ITSM administrators manage the function and flow of the ITSM applications.
ITSM agents	ITSM agents manage ITSM-related support tickets and escalations.

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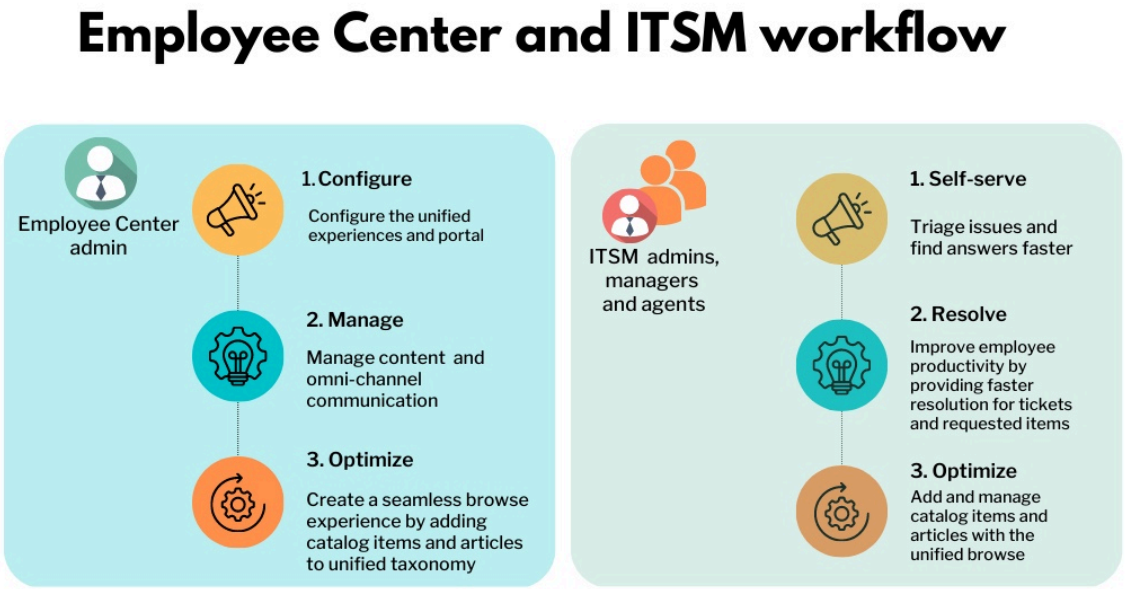
Employee Center for ITSM workflow

The infographic highlights how Employee Center can enhance the ITSM managing and service experience.

Employee Center and ITSM workflows



Connect everything and easily scale across the enterprise to deliver experiences you need. Provide a modern employee experience platform across the enterprise to:

- Improve case-deflections for the admins to focus on more complex tasks
- Improve service management like managing the Service Catalog and the Knowledge Base articles on ITSM
- Improve self-service for the employees
- Increase employee engagement
- Increase employee productivity

The following requirements must be met to use Employee Center with ITSM.

- You can use Employee Center with ITSM or ITSM Pro subscription.
- You must subscribe to Employee Center Pro separately from the ServiceNow store.

Employee Center versus Employee Center Pro

Employee Center is one portal that is packaged as two separate store applications:

- Employee Center: Multi-department service delivery that enables employees to report issues, request items or services, find service-related answers, and complete to-dos. This application and its capabilities are available to all customers by default.
- Employee Center Pro: Subscription-based application that extends the standard Employee Center capabilities including content creation capabilities, multi-stage and multi-channel content delivery, and portal analytics. This application requires additional licensing.

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EC and EC Pro feature comparison

Functionality	Employee Center	Employee Center Pro
Service catalog and Knowledge Base articles	✓	✓
AI Search	✓	✓
Chat (live agent, virtual agent)	✓	✓
Curated Experiences (Unified Taxonomy for Employee Center, Dynamic topic pages, Mega Menu)	✓	✓
Complete tasks and Manage requests	✓	✓
Content recommendations (via "recommended for you")	✓	✓
Cross-channel Favorites	✓	✓
Unified employee profile	✓	✓
Guided Self-Service in Employee Center	✓	✓
Employee communications • Portal content • Microsites • Employee News • Content engagement • Campaigns • Content Analytics • Content Governance	✗	✓
Enterprise Search (with SharePoint Online Search Connector)	✗	✓
Integration-powered capabilities • App Launcher • Approval Hub	✗	✓
Manager Hub	✗	✓
Org chart and Dotted-line relationships	✗	✓
Employee Forums	✗	✓
Employee Center Pro Kiosk	✗	✓
Integrated experience and service feedback	✗	✓

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What to explore next

To learn more about configuring and using Employee Center for ITSM, see:

- Configuring Employee Center for ITSM
- Using Employee Center for ITSM

Configuring Employee Center for ITSM

Leverage Employee Center for ITSM to provide an integrated and seamless experience to the employees, agents, and service managers.

Configuration overview for Employee Center

- Employee Center admin configurations

  Configure your Employee Center Portal to get started with its functionalities.

- Setup Employee Center browse experience features

  Provide your employees with a unified browse experience to tackle minor issues through self-service and leave agents to handle more complex issues, which needs human interventions.

- Setup Employee Center search experience features

  Enhance the search experience of your portal by creating different access points for various content that can be leveraged by different personas like employees, agents, and service managers.

- Setup Employee Center task management

  Enhance the productivity of different personas involved with a consolidated task management system.

Configuration overview for Employee Center Pro

- Employee Center Pro admin configurations

  Set up the Employee Center Pro portal to leverage its functionalities.

- Setup Employee Center Pro task management
- Provide enhanced task management functionalities like Approval hub for a consolidated place for all your approval requests for different task manager personas.
- Setup employee communications

  Create dynamic content and enhance communication with different personas with functioanlities like Content engagement and Rich Content Editor.

Using Employee Center for ITSM

Use Employee Center for ITSM together to reduce costs, deliver high-quality customer and employee experiences, and drive operational resilience.

- Using Employee Center

  Get an overview of the functionality usage in Employee Center to leverage your IT Service Management experience.

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- Using Employee Center Pro

  Get an overview of the functionality usage in Employee Center Pro to leverage your IT Service Management experience.

Employee Center Pro

Employee Center Pro expands the portal experience beyond service delivery with employee communication and engagement tools including content publishing, campaigns, and employee communities.

Get started

Explore  Learn about Employee Center Pro concepts and features.	Configure  Set-up the portal and Employee Center Pro features.
Author and Manage  Create employee communications and manage content requests.	Reference  Get details about Employee Center Pro components such as fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Employee Center Pro

Employee Center Pro is a modern, multi-department employee destination site to drive employee engagement and productivity.

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Employee Center Pro overview

https://player.vimeo.com/video/1104046295?h=6eeadcf516&badge=0&autopause=0&player_id=0&app_id=58479

Employee Center Pro expands the portal experience beyond service delivery with employee communication and engagement tools including content publishing, campaigns, and employee communities.

Unified portal experience

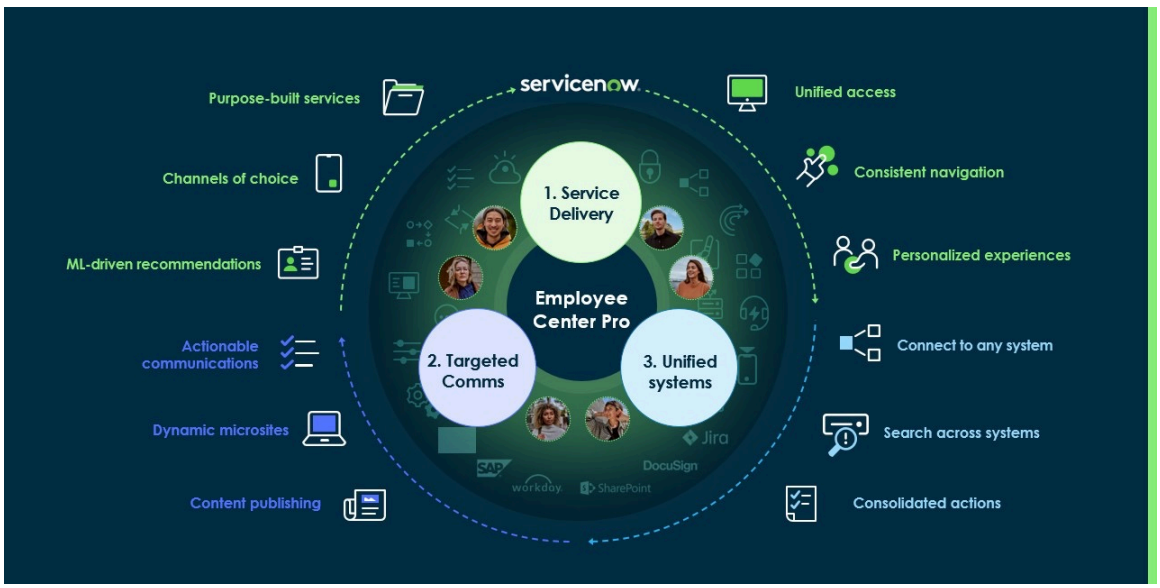
Employee Center Pro improves employee productivity by reducing the time and effort employees spend looking for services, updates, and information. With the Employee Center Pro portal, access to information and services across all departments are made simple and can be accessed through any device.

Extensible service delivery platform

Organizations can easily scale from a single to a multi-department service delivery use case that includes best-in-class home page and specialized widgets designed for multi-department tasking.

Employee engagement and communication

Employees stay informed on news and events, engage with coworkers and leaders, receive targeted communications, and find cross-enterprise answers.



Employee Center Pro workflow

The Employee Center Pro enables organizations to assemble an employee portal tailored to their needs. The following illustration provides an overview of how users interact with Employee Center Pro.

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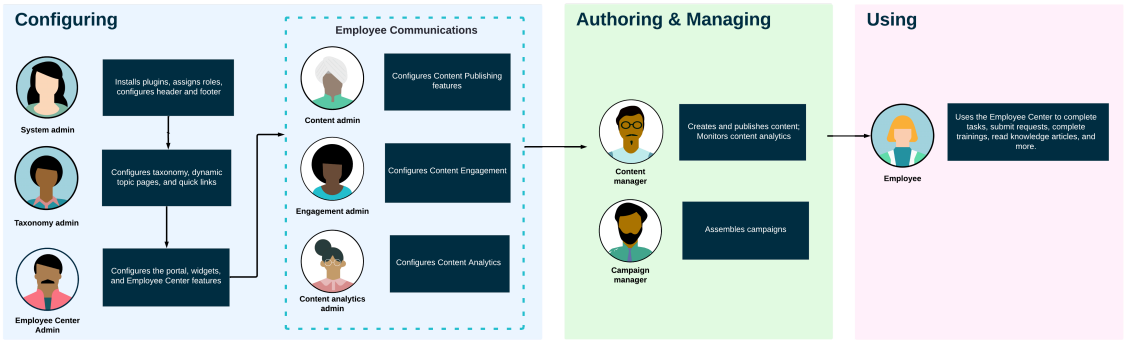
Employee Center Pro workflow



1. System admin installs plugins and assigns roles.
2. Taxonomy admin configures the Unified taxonomy, dynamic topic pages, and quick links.
3. Employee Center admin configures Employee Center portal, widgets, and features including the action framework, employee profile, recommended for you, Guided Self-service, and cross-channel favorites.
4. Content admin, Engagement admin, and Content analytics admins configure employee communications features.
5. Content manager creates and publishes content, as well as monitors the content performance metrics.

   Campaign manager assembles the content into campaigns to send targeted communications to specific audiences across multiple channels.
6. Employees use the Employee Center to complete tasks and trainings, submit requests, read knowledge articles, and more.

What to explore next

To learn more about configuring and using Employee Center Pro, see:

- Configuring Employee Center Pro
- Authoring and managing employee communications
- Employee Center Pro reference

Configuring Employee Center Pro

Guidance for setting up Employee Center Pro.

In the links below, Employee Center Pro features are organized into categories, each with its own landing page to help guide users through the configuration process.

- Admin configurations

  Install plugins, assign roles to users so they can configure Employee Center Pro features, and customize the portal with a theme, footer, and support for right-to-left languages.
- Browse experience

  Make it easy for employees to navigate the portal and discover content.
- Search experience

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Enhance the search experience.

- Task management

  Enhance employee productivity and drive portal consolidation.

- Employee communications

  Inform and engage your employees.

- Continuous improvement

  Enhance efficiency and performance through feedback and analytics.

Related topics

Configuring Employee Center for mobile

Employee Center Pro Kiosk

Employee Center for Microsoft Viva Connections

Employee Center for Zoom

Employee Center Pro admin configurations

As the system admin, install Employee Center Pro plugins, assign roles to users so they can configure Employee Center Pro features, set the theme, header, and footer, and enable support for right-to-left languages.

The Employee Center Pro application provides out-of-the-box portal pages with relevant widgets necessary to deliver an employee-centric portal experience.

1. Install plugins
2. Assign roles
3. Configure the portal:
   - Customize Employee Center portal theme
   - Employee Center global header
   - Footer configuration
   - Enable support for right-to-left languages
   - Customize the portal pages, such as the home page:

     Navigate to **Service Portal** > **Pages** to view all the pages.

     The Employee Center Pro home page is `ec_pro_home`
   - Modify the email notification subject and body, such as when a new task is assigned: Modify email notification layout

Upgrading to Employee Center Pro

Guidance on preparing for and performing an upgrade from Employee Center to Employee Center Pro.

Install Employee Center Pro

Employee Center Pro extends the standard Employee Center capabilities and provides a platform for employees to communicate and be engaged.

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Before you begin

Employee Center Pro requires a separate subscription from the rest of the ServiceNow AI Platform. If you are already using Employee Center and want to upgrade to Employee Center Pro, contact your ServiceNow account manager to purchase the subscription.

Note: Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog. For more information, see Request a plugin.

The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Install the Enterprise Service Management Integrations Framework (sn_hr_integ_fw) plugin to enable Employee Center Pro to integrate with third-party systems. See Enterprise Service Management Integrations Framework.

Role required: admin

About this task

Employee Center Pro installs the following dependent plugins:

Employee Center application (sn_ex_sp)

Installs a customizable multi-department portal and framework to help administrators build a self-service portal that provides a great self-service experience for employees.

Employee Center Core (sn_hr_sp)

Activates a portal framework that allows administrators to build a mobile-friendly self-service experience for users.

Employee experience taxonomy (sn_ect)

Provides an employee content taxonomy for multi-department service delivery.

Employee Experience Foundation (sn_ex_emp_fd)

This plugin contains components such as best practice email layouts that improve employee experiences.

For information on the roles, tables, and widgets installed with Employee Center Pro, see Components installed with Employee Center Pro.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Employee Center Pro application (sn_ex_sp_pro) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

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Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Employee Center Pro.

4. Select the **Load demo data** check-box to include the demo data along with your install or repair your install with demo data checked.

   Note: Dependent plugin demo data is not automatically installed. To use demo data, repair the plugins with demo data checked. See Repair a ServiceNow application.

5. Select **Install**.
6. Run the fix script **Set primary topics for Employee taxonomy** to index the curated experiences demo data into search and recommended content.
   For more information, see Run fix scripts to update Employee Center.

What to do next

- Check and allow all the RCA (Requested Caller Access) privileges requested by Employee Center. For more information on running a fix script for RCA approvals, see Run fix-script for RCA approvals.
- Install plugins to extend Employee Center Pro capabilities:

  Content Experiences (sn_ca)

  Package your content into a campaign using multiple channels to deliver the right message to the right audience at the right time. For more information to activate this plugin, see Activate Content Experiences.

  Content Publishing (sn_sd)

  Use Content Publishing to create different types of information you want to distribute to your employees. For more information to activate this plugin, see Activate Content Publishing.

  Content Analytics (sn_cda)

  Content Analytics helps you decide when content is stale, needs refreshing, and how engaged your employees are with your communication. For more information to activate this plugin, see Activate Content Analytics.

  Content Governance (sn_cg)

  Content Governance provides a streamlined way for employees to request content to be created, track the progress, preview the content, and approve it before it is published. For more information to activate this plugin, see Activate Content Governance

Related topics

Components installed with Employee Center Pro

Upgrade to Employee Center Pro from Employee Service Center (HR)

Migrate to the Employee Center Pro portal to provide employees with a unified portal and content experiences.

Before you begin

Role required: admin

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About this task

Employee Center is delivered to all customer as a default application, and Employee Center Pro is a licensed application and must be separately installed. For more information, see Install Employee Center Pro.

Note: If you are an existing customer using Employee Service Center, to experience the enhanced content experience capabilities, you must update to the latest Employee Center Pro application from ServiceNow Store. For more information on the installation steps, see Install Employee Center Pro.

Procedure

1. Install Employee Center Pro to get the latest features.
2. Navigate to **System Definition** > **Fix Scripts**.

   Note: Run the **Fix Scripts** only if you want to reset the existing portal home page and the topic pages to the default Employee Center home page.

3. Ensure your application scope is set to **Employee Center Core**.
4. Click open the **Employee Center Easy Install** fix script.
5. On the line `"var runManually = false"`, change the value **false** to **true**.
6. Run the fix script.
7. Clone taxonomy for employee content.
8. AI Search for Curated Experiences
9. Configure **My Active Items** widget.
   For more information, see My active items widget configuration.
10. Configure **Quick Links**.
    For more information, see Quick links.
11. Configure the portal footer.
    For more information, see Footer configuration.

Result

This upgrades the Employee Service Center with the latest Employee Center Pro themes and capabilities.

Employee Center Pro plugins

Discover the Employee Center Pro plugins that are included out-of-the-box on a new ServiceNow® instance, as well as plugins that are installed when you upgrade to Employee Center Pro.

Installed with Employee Center Pro

The following dependency plugins are installed with Employee Center Pro.

Plugins for Employee Center Pro

Plugin	Description
Employee Center (sn_ex_sp)	Installs a customizable multi-department portal and framework to help administrators build a self-service portal that provides a great self-service experience for employees.

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Plugins for Employee Center Pro (continued)

Plugin	Description
Employee Center Pro (sn_ex_sp_pro)	Employee Center Pro extends the standard Employee Center capabilities and provides a platform for employees to communicate and be engaged. Install Employee Center Pro
Enterprise Service Management Integrations Framework (sn_hr_integ_fw)	Enables Employee Center Pro to integrate with third-party systems. Enterprise Service Management Integrations Framework
Employee Center Core (sn_hr_sp)	Activates a portal framework that allows administrators to build a mobile-friendly self-service experience for users.
Employee experience taxonomy (sn_ect)	Provides an employee content taxonomy for multi-department service delivery.
Employee Experience Foundation (sn_ex_emp_fd)	Contains components such as best practice email layouts that improve employee experiences.
Content Publishing (sn_sd)	Use Content Publishing to create different types of information you want to distribute to your employees. Activate Content Publishing
Content Experiences (sn_ca)	Package your content into a campaign using multiple channels to deliver the right message to the right audience at the right time. Requires Content Publishing (sn_sd) Activate Content Experiences

To learn about the tables, roles, and widgets installed, see Components installed with Employee Center Pro

Plugins to extend Employee Center Pro capabilities

The following plugins are available after you install Employee Center Pro. It is not required to install all the plugins, however some plugins depend on other plugins to function.

Optional plugins for Employee Center Pro

Plugin	Description
Employee Profile (sn_employee)	Enhance employee experience with a unified, configurable profile, offering comprehensive work-related information, extensibility across

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Optional plugins for Employee Center Pro (continued)

Plugin	Description
	business units, and personalized visibility settings.
Communities (com.sn_communities)	The Communities plugin supports Employee Forums, where employees can connect, engage, and collaborate with each other. Requires Content Publishing (sn_sd) and Content Experiences (sn_ca) Activate Communities plugins
Content Analytics (sn_cda)	Content Analytics helps you decide when content is stale, needs refreshing, and how engaged your employees are with your communication. Requires Content Publishing (sn_sd) and Content Experiences (sn_ca) Activate Content Analytics
Content Governance (sn_cg)	Content Governance provides a streamlined way for employees to request content to be created, track the progress, preview the content, and approve it before it is published. Requires Content Publishing (sn_sd) and Content Experiences (sn_ca) Activate Content Governance

For more information, see the List of plugins (Australia).

Activate Content Experiences

You can activate the Content Experiences [sn_ca] plugin if you have the admin role to deliver targeted content and campaigns to keep employees informed and engaged. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Role required: admin

About this task

Content Experiences plugin activates these related plugins if they are not already active.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

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Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

- Components installed with Content Experiences
- Properties installed with Content Experiences
- Creating campaigns

Activate Content engagement

You can activate the Content Engagement [sn_ce] plugin if you have the admin role to enable employee engagement activities (reaction icons, comments, or sharing content) with portal and mobile content.

Before you begin
Role required: admin

Activate the Content Publishing [sn_cd] plugin: Activate Content Publishing

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

- Components installed with Content engagement
- Content engagement

Activate Content Publishing

Activate the Content Publishing [sn_cd] to create and distribute engaging employee content. This plugin includes demo data and activates related plugins if they are not already active. To use the Employee Communities feature, activate the Customer Communities [com.sn_customer_communities] plugin.

Before you begin
Role required: admin

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Install Employee Center Pro

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Components installed with Content Publishing

Properties installed with Content Publishing

Setup employee communications

Activate Content Governance

You can install the Content Governance application (sn_cg) to provide a streamlined method for employees to request content to be created for Content Publishing.

Before you begin

Role required: admin

Activate these plugins:

- Content Publishing [sn_cd]
- Content Experiences [sn_ca]

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Install dialog that is displayed, any dependencies that are installed along with your application are listed.
4. If you are prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Related topics

Components installed with Content Governance

Managing content requests

Employee Center Pro roles

Employee Center Pro plugins include necessary roles for configuring and using the features. Learn more about the roles and the tasks they can perform.

Users and roles are configured at the platform level. For information, see Assign a role to a user.

Employee Center

Employee Center roles and descriptions

Role	Description	Contains roles
Employee Center Admin [sn_hr_sp.esc_admin]	A user with this role can manage and configure the Employee Center. **Note:** The sp_admin and esc_admin have scripting rights. These roles can create a widget and run a script to update cross-scope tables.	• catalog_admin • chat_admin • live_feed_admin • sn_employee.admin • sn_ex_emp_fd.portal_stats_manager • sn_hr_sp.admin • sp_admin
Taxonomy Admin [taxonomy_admin]	A user with this role can update and modify any created taxonomy in the taxonomy and topic table names.	user_criteria_admin
Taxonomy Manager	A user criteria on the taxonomy record. A user assigned as a taxonomy manager can manage topics and connected content, but they cannot manage the taxonomy record.	Not applicable
Taxonomy Contributor	A user criteria on the taxonomy record. A user assigned as a taxonomy contributor can associate content to the topics.	Not applicable

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Employee Center roles and descriptions (continued)

Role	Description	Contains roles
Topic Manager	A user criteria on the topic record to decentralize topic management. Users assigned as Topic managers can create, move, or clone topics within or between taxonomies, depending on the rights assigned to them.	Not applicable
Topic Contributor	A user criteria on the topic record for topic management level tasks, such as handling connected content, features content, Knowledge Base	Not applicable

Employee Profile

For more information, see Employee profile

Employee profile roles and descriptions

Role	Description	Contains roles
Employee profile admin [sn_employee.admin]	Configures employee profile	• image_admin • ml_admin

Content Analytics

For more information, see Content Analytics

Content analytics roles and descriptions

Role	Description	Contains roles
Content analytics admin [sn_cda.analytics_admin]	Configures tracking profiles and customizes dashboards	• sn_cdap.admin • user_admin • sn_cda.analytics_reader
Content analytics reader [sn_cda.analytics_reader]	Can view and interact with dashboards	pa_viewer

Content engagement

For more information, see Content engagement

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Content engagement roles and descriptions

Role	Description	Contains roles
Content engagement admin [sn_ce.admin]	Configures reaction icons for news articles Content engagement	sn_ce.moderator
Content engagement moderator [sn_ce.moderator]	Can remove reported comments from news articles	None

Content Experiences

For more information, see Creating campaigns

Content experiences roles and descriptions

Role	Description	Contains roles
Campaign admin [sn_ca.campaign_admin]	Can access, modify, or delete any campaign	• sn_ca_pa.admin • sn_ca.campaign_manager
Campaign manager [sn_ca.campaign_manager]	Creates content, assembles content into campaigns, and reviews performance metrics for published content	• pa.viewer • sn_ca.content_manager • sn_ca.campaign_approver
Campaign approver [sn_ca.campaign_approver]	Reviews and approves campaigns	sn_cd.content_approver

Content Governance

For more information, see Managing content requests

Content governance roles and descriptions

Role	Description	Contains roles
Governance admin [sn_cg.governance_admin]	Can access, assign, or modify any content request	sn_cg.governance_manager
Governance manager [sn_cg.governance_manager]	Can access open content requests and modify the status	None

Content Publishing

For more information, see Creating employee communications

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Content publishing roles and descriptions

Role	Description	Contains roles
Content Admin [sn_cd.content_admin]	• Define Content Ownership • Connect Content Publishing with a Video hosting integrations framework	• Content Manager [sn_cd.manager] • Template Owner [sn_cd.content_template_owner] • sn_cg.governance_admin • sn_cg.content_request_user • sn_cg.content_request_item_user • sn_cd.content_category_owner • sn_cda.analytics_admin • sn_ex_emp_fd.portal_stats_manager
Content Manager [sn_cd.content_manager]	Create, edit and publish content in Content Publishing	• localization_requestor • sn_cg.governance_manager • sn_cg.content_request_user • sn_cg.content_request_item_user • sn_esign.config_manager • sn_cd.content_approver • sn_cda.analytics_reader
Content approver [content_approver]	Reviews and approves content	approver_user
Content category owner [sn_cd.content_category_owner]	Create, edit, and delete content categories	None
Template Owner [sn_cd.content_template_owner]	This role allows users to create Content templates for news article content creation and publishing.	sn_cd.content_manager

Enhanced chat in Employee Center

Learn more about the theme updates and how to get started with Now Assist enhanced chat.

You can see a new theme that is visually-engaging, effective, and user-friendly with the following enhancements:

- **Enhanced home page theme**: Unifies various types of content, such as requests, articles, and quick links, to create an improved browsing experience. The theme aligns with the latest sets components, a new color scheme, a logo update, and CSS variable adjustments for an improved browsing experience.

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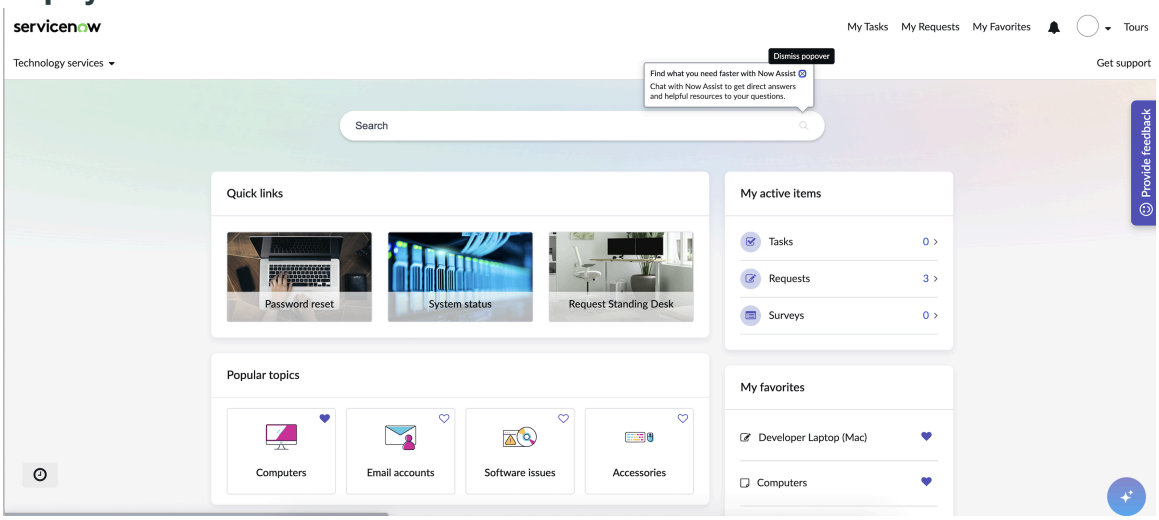
- **Enhanced header**: Helps you navigate to your tasks, requests, favorites, and search effectively.
- **Enhanced chat**: Offers a conversational search experience in a dynamic dialogue to gather information, provide help, or guide through a process using the search.

Enhanced theme in Employee Center

This theme provides a more functional and clean design that is visually appealing to users. This theme aligns with the new sets components, a new color scheme, logo update, and CSS variable adjustments.

Employee Center theme



Enhanced header

Enhanced header helps you navigate to my tasks, requests, favorites, and search quickly.

Enhanced chat

To get started with the Now Assist in Virtual Agent enhanced chat:

- Install the Now Assist in Virtual Agent application from the store.
- Ensure that the enhanced chat is configured for the Employee Center portal by virtual_agent_admin.
- Select Employee Center from the Portals tab and select the enhanced chat.

  For more information, see Display your chat assistant on a portal, channel, or mobile app.

Important: Pinning chat windows can create responsiveness issues on the following screen resolutions and pixel range.

- For homepage, my tasks page, my favorites page, and my applications page: Range between 600px and 800px.
- For topic page: Below 1413px.

Ensure you avoid pinning the chat window and resizing on these screen resolutions.

More information about Now Assist in Virtual Agent enhanced chat

Want to learn more? Visit these resources about Now Assist in Virtual Agent enhanced chat.

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Important: By default, pinning a chat window is enabled for Service Portal. For all other portals, an admin needs to create a system property to enable pinning a chat window. For more information, see Now Assist in Virtual Agent system properties.

- Enhanced chat
- Now Assist in Virtual Agent
- Portal prerequisites for enhanced chat
- Configuring assistants overview
- Using Now Assist in Virtual Agent
- Exploring Now Assist in Virtual Agent

Setup Employee Center search experience features

Enhance the search experience.

Search experience features

Feature	Description
AI Search for Curated Experiences	Align the AI search to limit the search to the content associated with the taxonomy.
Personalized Answers on Employee Center	Enable employees to quickly find their leave balance.
SharePoint Online Search Connector	Connect the Employee Center with SharePoint to enable employees to search for information resources from the portal. **Important:** Starting with the Yokohama release, SharePoint Online Search Connector is being prepared for future deprecation. It is hidden and no longer activated on new instances but continue to be supported. For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

AI Search for Curated Experiences

Align the AI search to limit the search to the content associated with your taxonomy.

Before you begin

Role required: admin

Deactivate the existing taxonomy so that the search configurations pick up the content from your taxonomy.

About this task

For new customers, the AI search is enabled by default.

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Note: AI Search returns additional results based on user roles:

- Users with either the system admin or content admin role can see unpublished content.
- For users with content approver roles, search results might include content for which they are not the audience. However, they cannot view the content unless they are part of the configured audience.
- For users with content admin or content manager roles, search results shouldn't include content (such as news, company events or rich content) in AI search results if they don't meet the scheduled availability window, or for which they are not the configured audience.

Procedure

1. Navigate to **All** > **AI Search** > **Search Experience** > **Search Sources**.
2. Click **ESC Portal Catalogs**.
3. In the **Conditions** field, set the **Taxonomy topic . Taxonomy** filter condition to point to your taxonomy to enable the search to focus on the content associated with your taxonomy.
4. You can modify the other default filter conditions or leave them as-is.
5. Click **Update** to return to the AI search source list.
6. Click **ESC Portal Knowledge Bases**.
7. In the **Conditions** field, set the **Taxonomy topic. Taxonomy** filter condition to point to your taxonomy to enable the search to focus on the content associated with your taxonomy.
8. You can modify the other default filter conditions or leave them as-is.
9. Click **Update**.

Improved search functionality

The improved global search provides narrowed down content browsing on the global search for quicker and more specific content browsing experience.

The improved global search by topic facets provides filtered data based on its association with the a topic and its sub-topics.

- The supported content types for the search facets include content available on the Unified Browse Widget, like, Service Catalog, Knowledge Base articles, and learning content.
- The topic facets filter content by hierarchy. Select a sub-topic to get specific hierarchical data.
- The base system facet levels available are two. You can add up to 10 levels.

  For more information on adding facet levels, see Configure search by the topic facets.

- The two sort options available on the search are **Most relevant** and **Most recent**.
  - Most relevant is the base system sorting option.
  - Most recent filters the data by date.

Note: You must have the Employee Center 28.0.4 installed along with Utah for the search by the topic facets feature to function.

Configure search by the topic facets

Configure the search by the topic facets, which suits your organizational requirements.

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Before you begin
Role required: esc_admin

About this task
The topic facets help filter out content by the hierarchy; topics and sub-topics. You can choose a single or multiple facets to narrow down your search results.
The supported content types for the feature are Service Catalog items, Knowledge Base, and learning content.

The base system facet level support is two. You can add up to 10 levels of facets.

Procedure
1. Navigate to **All** > **AI Search** > **Search Applications** > **ESC Portal Default Search Application**.
2. Go to the **Facets** tab and click **New**.
3. Create a facet with the relevant details according to the topic or sub-topic.

Configure search source when AI search is disabled

In Employee Center, the AI search is enabled by default. In situations where the AI search is disabled, you can configure a search source from which to fetch search results.

Before you begin
Role required: admin

About this task
The search source configuration limits the search to the content associated with the taxonomy. Employee Center uses the Zing search engine if the AI search is disabled.

Procedure
1. Navigate to **All** > **Service Portal** > **Portals**.
2. Click **Employee Center**.
3. From the **Search Sources** related list, click **New** to add a search source.
4. On the form, fill in the fields.
   For more information, see Define a search source.
5. Click **Submit**.

Configure search navigation tabs

In Employee Center, the AI search navigation tabs are enabled by default. You can configure a search navigation tab on the search results.

Before you begin
Role required: admin

Ensure you understand the AI search and indexed sources. For more information, see Create an indexed source and Configuring navigation tabs in AI Search.

About this task
The search navigation tabs help you to refine their search query results by search source.

Procedure
1. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
2. Use the available **AI Search Indexed Sources** or click **New**.

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By default, the following sources are available for Employee Center.

- Guided Self-Service
- Applications
- Articles
- News
- Events

Note: Ensure you install the required applications.

3. Click **Submit**.

Result
The configured sources appear on AI search results in a tab. For more info on how tabs appear in AI search, see Configure application visibility and access.

Configure click-rank search relevance

Enhance the topic page search rank based on the clicks and usage of a topic by the employees.

Before you begin
Role required: Admin

Important: The click-rank population of search results is available for the Xanadu family release and beyond. For Washington, the behavior doesn't work due to a limitation.

Ensure you understand the AI search and search suggestions.

About this task
When employees search for topic pages, such interactions influence and improve future search rankings and the content discovery for the organizations. Determine click rank population for search results from the clicks and usage of the topic among employees.

Procedure
1. Understand the basics of search events and suggestions from Analyze search relevancy.
2. Navigate to **All** > **Search Suggestions** > **Search Events**.
3. Review **Click rank** for search query and other details.
   Click rank shows which search result you selected.
   - If you click the first result in the list of search results, the click rank value is 1. If you click the 6th result listed, the click rank value is 6.
   - If you click multiple search results, the click rank is the highest listing value. For example, if you click the first result, return to the search page and click the 6th result, return to the search page and click the 4th result and find an answer, the click rank is 6 (not 4).

   A click rank of 0 means that you don't select any search result, or that you selected a result answer card in AI Search. Lower positive click rank values indicate that the top search results are the most relevant, so the goal is to reduce the average value for this field.

Result
Based on this configuration, your employees can easily find the relevant content based on click rank and portal-specific search results.

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Configure topic search filter

Customize search experiences for different portals by configuring the search application and filters.

Before you begin

Role required: Admin

About this task

You can configure the Topic content widget for a portal-specific search application. Using this, when a Topic page is opened in a portal the same search application and search filter are being applied.

- Configure portal-specific search applications for the Topic search widget.
- Customize search filters and settings for each portal while using cloned topic pages or portals.
- Improve overall search efficiency as search settings are inherited from the portal context.
- Deliver search results that are consistent with the portal-specific search settings.

Procedure

1. Navigate to **Content Taxonomy** > **Topic Search Configuration**.
2. Click **New** or open an existing record.
3. On the form, fill in the fields.

Topic search configuration form

Field	Description
Portal	Name of the portal `Employee Center`.
Application	Name of the application `Global`.
Widget instance	Topic content widget instance, for example, `ESC Topic Page`. In the lookup, add filter condition (widget=Topic content) to filter the topic content widget instances.
Search application	Default search application, for example, `ESC Portal Search Application`.
Search filter	List of active search filters based on the search application such as ESC Portal catalogs, ESC Portal Knowledge bases, and Guided Self-Service.
Active	Active indicates the status of the topic search configuration.
Order	Order in which the items are sorted and displayed. Default value:100.

4. Click **Save**.
   Topic search is now configured.

Result

Based on this configuration, your employees can filter content by Search Filter and view results specific to portal and topic search results. For example, when you select ESC portal catalogs as a filter, employees can filter and view the catalogs only.

Setup Employee Center Pro task management

Enhance employee productivity and drive portal consolidation.

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1. Configure the employee task experience:
   - Employee tasks page
   - Employee requests page
   - My Active items
   - Approval hub
2. Enable employees with single-click access to their web applications, both SSO-integrated and custom non-SSO applications: App Launcher
3. Configure employee information:
   - Employee profile
   - Organization chart in Employee Center Pro

My active items widget configuration

The My active items widget displays all user activity that requires your input or review.

In the My active items widget, tasks, surveys, and request activities are available by default in the Employee Center. The Tasks activity is set to primary by default. Task activities are displayed using the existing to-do configuration and the Requests activities are displayed using the existing request filters.

Note: You can add additional configurations to display your activities. For example, to display activities for reservations, you must install and activate the plugin for the ServiceNow® Workplace Reservation Management application.

From **My Active Items** widget, admins can perform the following actions.

- Organize items based on priority or urgency.
- View the items in vertical or horizontal layouts.
- Perform actions on the assigned tasks from **My Active Items**.

My active items actions

You can now configure action framework to allow employees to perform actions from the My active items.

Configure **Action group** for the primary activity to complete suitable actions. For tasks, the approve and reject actions are available out-of-the-box. For more information, see Enable task configuration for approvals

Note: When you do not associate an action group with the tasks, the **View details** option appears to navigate to the activity details page.

My Active Items Widget Layout Guidance

The My Active Items widget is designed for optimal display and usability when configured using a column size of 3 or greater. This layout ensures that information presented within the widget remains readable and visually consistent across Employee Center topics.

Note: The My Active Items widget does not support column sizes less than 3. If you use a column size below 3, the widget is not guaranteed to display correctly for all screen widths. Currently, there are no plans to improve support for smaller column sizes. We suggest you use a column size of 3 or higher moving forward.

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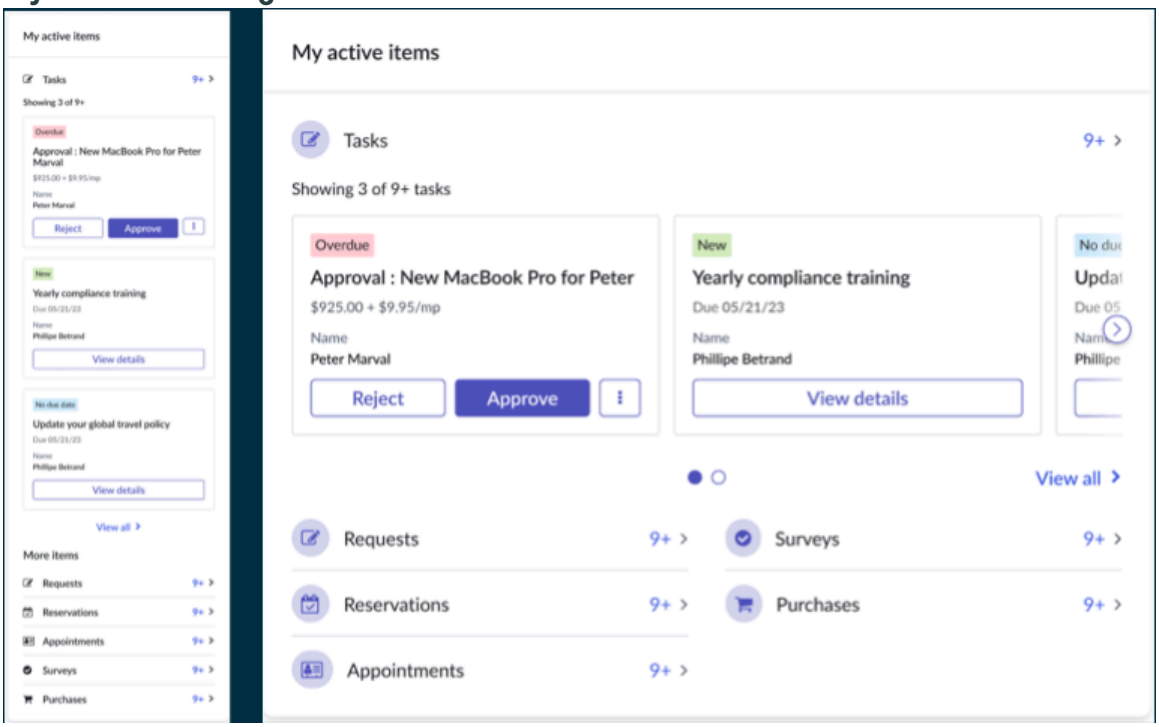
My active items widget items



To change the display options, see Perform an advanced activity configuration.

Summary view

The summary view displays a count of all the activities. The count for the primary activity is shown at the top of the widget. The count for the non-primary activities is shown after that. For example, tasks (9 Tasks) is the primary activity and requests (9+ Requests) is the non-primary activity. If the number of activities is zero, the summary view displays **0** next to the activity name. For example, if there are zero tasks, then the summary view displays 0 Tasks. If the count of tasks exceeds 9 in number, the summary view displays 9+ next to the activity name. For example, If there are 10 tasks, then the summary view displays 9+ Tasks.

Clicking an activity in the widget opens the page that you specified in the **Internal Link** field of the Activity Configuration form.

List view

The list view displays a list of to-dos only for the primary activity. If you set the Tasks activity as primary, the list view displays to-dos only for the Tasks activity. The **View All** option opens the page you have configured for the primary activity.

You can do an advanced configuration or a basic configuration for an activity. Use the out-of-the-box **Approvals action group** to display the actions such as **Approve** and **Reject**.

Note: When you do not associate an action group with the tasks, the **View details** option appears to navigate to the activity details page.

For more information, see Action framework.

Note: For actions to appear in my items widget, you can add the OOTB **Approvals action group** from **All** > **Employee Center** > **Administration** > **To-dos Configurations**, click an existing to-dos configuration, navigate to the **To-do Configuration Details** record, and use the OOTB action group under **Fields Mapping**.

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Related topics

Perform a basic activity configuration

Perform an advanced activity configuration

Perform a basic activity configuration

Configure activities to determine which records you want to retrieve from a table when certain conditions are met.

Before you begin
Role required: admin, sp_admin, or ESC admin

Procedure

1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Activity Configuration form.
4. Click **Save** or **Submit**.

What to do next
If you click **Save**, the **Activity Configuration Details** tab appears. Provide details for a basic activity configuration.

Provide details for a advanced activity configuration. For more information, see Perform an advanced activity configuration.

If you click **Save**, the **Activity Configuration Details** and **Activity Access** tabs appear.Restrict access to an activity. For more information, see Restrict access to an activity.

Provide basic activity configuration details

After you create a basic activity configuration, you must specify which records for the activity you want to retrieve from the tables.

Before you begin
Role required: admin, sp_admin, or ESC admin

Procedure

1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
2. The Activity Configurations module displays the list of existing activity configurations.
3. Click the basic activity configuration to provide configuration details.
4. Click the **Activity Configurations Details** tab.
5. Click **New**.
6. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Activity Configuration Detail form.
7. Click **Submit**.

Perform an advanced activity configuration

Configure activities to display their count and to display items in a list for a primary activity.

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Before you begin
Role required: admin, sp_admin, or ESC admin

Procedure
1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Activity Configuration form.
4. Select the **Advanced** option.
5. In the **Summary view script** field, add a script to display the count of activities, for example, `new sn_ex_sp.ActivityConfigurationUtil().getTasksCount();`
   The API returns an integer value.
6. In the **List View script** field, add a script to display items in a list, for example, `new sn_ex_sp.ActivityConfigurationUtil().getMyTodos(recordsLimit);`

   Note: Do this step only if you have marked this activity as primary by selecting the **primary** option.

7. On **List view json**, provide a template with mapping of table fields to component properties.
   For example, `{ 'badge': '', 'badgeColor': '', 'image': '', 'title': '', 'description': '', 'field1Label': '', 'field1Value': '', 'field2Label': '', 'field2Value': '', 'itemUrl': '', 'target': '' // target is '' if its internal or portal page url. target is '_blank' if url is external }`
8. Click **Save** or **Submit**.

What to do next
If you click **Save**, the **Activity Access** tab appears. For more information, see Restrict access to an activity.

Restrict access to an activity

Apply user criteria to an activity to define which users, groups, and roles can access the activity.

Before you begin
Role required: admin

About this task
In the My active items widget, the activity that a user does not have access to is not displayed for that user.

Procedure
1. Navigate to **All** > **Employee Center** > **Activity Configuration**.
   The Activity Configurations module displays the list of existing activity configurations.
2. Click the activity configuration that you want to restrict access to.
3. Click the **Activity Access** tab.

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To	Do this
Add a new user criteria	**a.** Click **New**. **b.** On the form, fill in the fields. For more information about the form fields and descriptions, see User Criteria form. **c.** Click **Submit**.
Edit an existing user criteria	**a.** Click **Edit**. **b.** On the Edit Members form, select the required roles, users, and groups from the Collection column and move them to the Activity Access List column by clicking the right arrow icon ( ). **c.** Click **Save**.

Approvals hub

Enable the approver with the in-context information for informed and prioritized approval decisions.

Use the approval templates with common info, primary info, tabs, and action groups to make informed decisions. You can configure individual approval types to display the request-specific information, while still having a consistent layout that is similar to other approval types.

Improve productivity with a unified approvals inbox. You can manage requests from internal and external applications from one location. Approvers can approve or send back Concur expenses to the requester right from Employee Center Pro with a configurable omni-channel experience.

Configurable experience

Enhance employee and approver experience by configuring the information and actions for each approval type.

Unified approvals inbox

Manage all your approvals from a unified location across business applications such as SAP Concur and Workday without switching the tools.

Omni-channel approvals

Meet employees where they are for approval management from all channels such as NowMobile, Outlook, and MS Teams.

Approvals user and roles

User roles

User roles	Required role
Approvals admin	sn_hr_sp.esc_admin
ESM framework admin	sn_hr_integr_fw.admin
Workday admin	sn_hr_workday.admin

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User roles (continued)

User roles	Required role
Flow designer admin	flow_designer

Note:

- The approver_user or the business_stakeholder role is required to be able to approve or reject items on the Employee Center Pro portal.
- The sn_request_read and sn_request_approver_read are read-only roles.

For more information, see Approvals hub integration with SAP Concur and Approvals hub integration with Workday.

How external integration works

Approvals hub integration enables you to share data between the two platforms, automate processes, and improve efficiency. Here are the steps involved in integrating ServiceNow and external applications such as SAP Concur and Workday.

Here is what an administrator can do.

As an administrator

- Use prebuilt integrations and the ability to build custom integrations.
- Pull external data and transform it for display on Employee Center Pro.
- Use the default to-dos configuration and task configuration to customize the approval flows.
- Enable quick actions to process the request.
- Sync data and status between the applications.

Here is what an approver can do.

As an approver

- View and manage open and assigned requests from ServiceNow and external applications from a unified location.
- Make approval decisions based on the contextual information as configured in the to-dos configuration and task configuration.
- Perform quick actions to process the request.

Here is what an employee can do.

As an employee

- Submit your approval requests from any internal and external applications.
- View progress or status of the request.

For more information, see Approvals experience reference and Use approval experience.

Enable task configuration for approvals

Provide the approvers with more in-context information about the approval requests for informed and prioritized approval workflows.

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Before you begin

Role required: sn_hr_sp.esc_admin

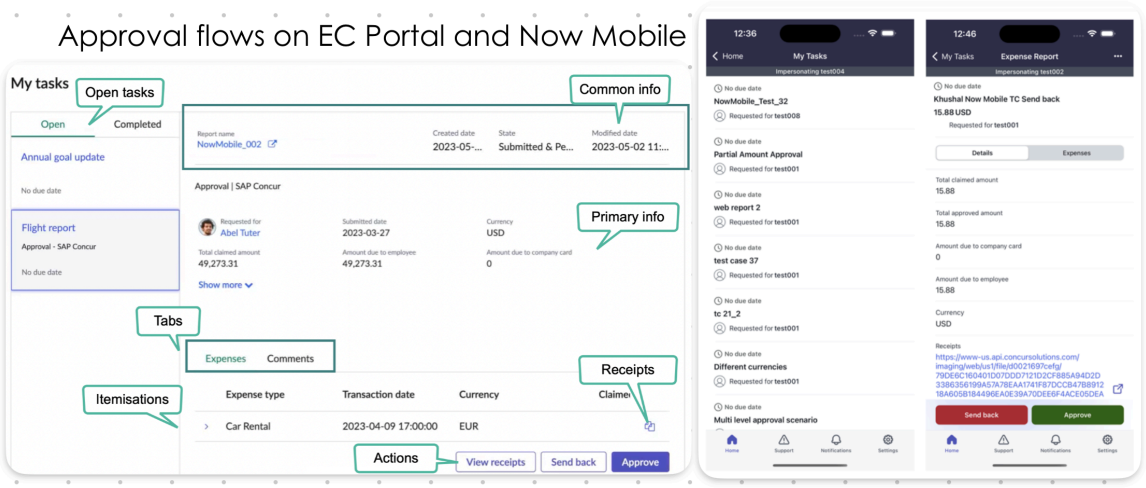
About this task

Each task configuration is associated with a table that is an extension of the To-dos configuration. Define the following task configuration sections:

- Task configuration
- Common information
- Primary information
- Tab configuration
- Actions

Here is a sample illustration of how these configurations appear on the approvals page.

Approval hub workflow in Employee Center



The information displayed on each section of the page depends on the individual approval request type. When a configurable section has no specified value or when a user does not have permission; information isn't displayed.

- Customize the experience by embedding widgets for all sections except task configuration.
- Click the URLs for additional information and context.
- Use the condition builder to specify the conditions that a task must meet to appear on the to-dos page.

Procedure

1. Go to **All** > **Employee Center** > **Administration** > **To-dos Configurations**, click an existing to-dos configuration, and navigate to the **Task Configuration** related list.
2. Click an existing **Task Configuration** record.
3. Fill in the fields on the form.

Task Configuration form

Field	Description
Name	Name of the task configuration.
Application	Application for the task configuration.

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Field	Description
Active	Check the box to activate the task configuration for use.
Table	Name of the table configured in the to-dos configuration to which the task config is associated.
Additional conditions	Conditions that a task must meet to apply configuration. You can dot-walk to the associated table to define conditions on other table columns. Conditions are implemented on top of conditions from To-dos config. Use the conditions to suit your requirements.
Reference column	To define conditions to the non-associated table, use a reference column from the selected table to help define conditions on reference tables. For example, the approvals reference column is **sysapproval**. **Note:** If the underlying submitted request is stored in a non-task table, select *Source table*.
Reference table	Reference table from above table to help define conditions on reference tables. For requests, the reference table is **sc_request**. You can select task or non-task tables in a task configuration such as *sn_wsd_rsv_reservation*. Also, use **Scripted Extension Points** to create *sn_ex_sp.RefNonTaskTables*.

4. Go to **Common Info** to configure the to-dos configuration header.

Common info form

Field	Description
Common info fields type	Select one of the following options to pick fields from the parent table or reference table as common info. ○ **Fields** ○ **Custom**
Common info fields - **Fields**	Fields you select from the parent table to appear as common info. When you select **Fields** from the parent table such as *Approval for.Number, Due date, Created, State*, the fields appear as common info. **Note:** When you select more than four fields, an error message appears.
Common info fields - **Custom**	Fields you specify from the parent and/or reference table to appear as common info. When you specify **Custom** fields such as *{reference_table.number}, {table.state}*, the number and state fields appear as common info.
Link to task	The link that opens the parent task or external links. You can link to a task or non-task table approvals. When you select the **External** option to open the link in a new tab. Also, adds an icon to denote an external link.

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Field	Description
	Select one of the options as **URL source** to display as URL. ○ When you select **Custom**, specify the URL directly. URL can have values from table and reference table. For example, *{table.<fieldname>} or {reference_table.<fieldname>}*. ○ When you select **Fields**, map a field from the table and specify a page parameter value. ○ When you select **Page**, specify page (for example esc_kb_category) and page parameter values. **Note:** These options appear only for non-task tables and when you select **Link to task**.

5. Go to **Primary Info** to configure the details.

Primary info form

Field	Description
Use widget	Select this option to use widget and widget parameters to customize experience of **Primary Info**.
Widget	Widget to display in the primary info section. Select the widget from the list. This field appears only when the **Use widget** option is selected. You can embed a custom or ootb widget for the entire primary section.
Widget parameters	Comma-separated list of widget parameters. You can specify a combination of static and dynamic text in the widget parameter values. This field appears only when the **Use widget** option is selected.
Title type	Indicates the title type that you want to display in the to-dos. ○ **Custom**: Indicates the custom text that appears as the to-dos configuration details. ○ **Fields**: Maps a field from the table that you selected to appear as the title.
Title	Title of the record. ○ Appears when you select **Custom** from the **Title type** list. Specify a combination of static text and dynamic field values as the title. ▪ To define the title from the table, use the Table *{table.field_name}*. ▪ To define the title from the reference table, use the Reference table *{reference_table.field_name2}*. Field name indicates the variable to be replaced with the column names from the respective tables.

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Field	Description
	Note: Ensure you append *table.* or *reference_table.* as a prefix to avoid rendering issues. ○ Appears when you select **Field** from the **Title type** list. Map a field from the table that you selected to appear as the title.
Page	Page you want to open when you click the link. This field (kb_article_view) appears only when the Reference column is Source table and the Reference table is Knowledge (kb_knowledge).
Page parameters	Additional parameters are required by some pages to look up a record (sysparam_article).
Fields	The fields you want to appear in the detail row of to-dos. The fields you choose are based on the table you selected. Only appears when you select **Parent fields** from the **Detail type** list.
Fields (Reference table)	Indicates the fields that you want to appear as the to-dos configuration details. If you select multiple fields, they're separated by a hyphen. Only appears when you select **Fields** from the **Detail type** list. **Note:** The price field mapping from the Primary section for OOTB REQ record is removed. However, Admin can add it if required.

6. On the form, fill in the fields.

Tab Configuration form

Field	Description
Type	Tab type based on which a widget is displayed. Possible options are: ○ Activity Stream: To display activity from the source task or request. ○ Line Items: To display parent-child relationship in multi-lines. ○ Attachments: To add or display the attachments from the source task or request. ○ Custom: To select a widget and parameters. ○ Variable Summarizer: To display only variables user had selected while requesting the item in a summarized format. ○ Variable Editor (Read-only): To display all variables present in the task in the format while creating request. ○ Selectable Line items: To display multiple line items that you can select and perform actions as a batch. **Note:** Using this option allows you to filter the requests by state.

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Field	Description
Source	Source for the selected type.
Table	Name of the table that the tab is associated with.
Display name	Display name of the tab.
Application	Application associated with the approval configuration.
Order	Order in which the tab is displayed in the tabs section.
Visible	Conditions for the tab visibility.
Script	Option to enable adding a script for the tab visibility. By default, this check box is cleared.
Visible script	Script for the tab visibility. ○ If the script returns true, the tab is visible on the standard ticket page. ○ If the script returns false, the tab is not visible on the standard ticket page. **Note:** This field appears only when the **Script** check box is selected.
Widget	Widget displayed in the tabs section. This field appears only when **Custom** is selected from **Type**.
Widget parameters	Comma-separated list of tab widget parameters.

7. Click **Actions** to search and select the required action group.
   Select the **Approvals action group** to display the frequently used actions such as **Approve** or **Reject**. For more information, see Action framework.
8. **Optional:** Add **Comments** in a custom widget to show comments.

   Note:
   - Ensure you have the write permissions to the Comment field. Check the ACL and grant permissions to add comments.
   - For more information on adding comments while rejecting an approval request, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB0760283.
9. Click **Submit** or **Update**.

Result
Based on this configuration, the approvers see the in-context important information about the approval and complete the approval. For more reference info, see Approvals experience reference.

Note: A user must have the approval_user or business_stakeholder role to approve IT requests (not applicable to other requests such as HR approvals) on Employee Centre. Role validation has not been implemented in Core UI16 because modifying ACLs in UI16 might have broader implications at the NowPlatform level.

Use the out-of-the-box **Approvals action group** to display the actions such as **Approve** and **Reject**. For more information, see Action framework.

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Note: For actions to appear in the my items widget, you can add the OOTB **Approvals action group** from **All** > **Employee Center** > **Administration** > **To-dos Configurations**, click an existing to-dos configuration, navigate to the **To-do Configuration Details** record, and use the OOTB **Approvals action group** under **Fields Mapping**.

.

Related topics

Use approval experience

Approvals in Now Mobile

Action framework

Approval hub integrations

The Approval Hub integration with different external applications enable different access points to fulfill organizational approval tasks.

Approvals hub integration with SAP Concur

Enable easier access to all active approvals of external business applications such as SAP Concur from Employee Center Pro. The SAP Concur spoke is built by Bristlecone, Inc.

Using Approvals hub integration with SAP Concur, you can perform the following actions from Employee Center Pro:

- Pull SAP Concur reports and expenses metadata into a ServiceNow application.
- View the SAP Concur expense reports, expense line items, receipts, itemizations, and comments from your ServiceNow instance.
- Enable approvers to view, send back, and approve the tasks right from Employee Center Pro.

Prerequisites

Remember the following information before getting started with the integration:

- Ensure you install the following plugins:
  - Employee Center Pro
  - SAP Concur spoke 2.0.0 and above *(sn_sap_concur_spok)*
  - Approvals hub integration with SAP Concur plugin *sn_ex_cnc*
  - Enterprise Service Management Integrations Framework

    Note: This framework is installed with Employee Center Pro.

- Approvals hub integration with SAP Concur is supported with Employee Center Utah patch 3 as the minimum supported release for the functionality to work on Utah.
- Understand how Enterprise Service Management Integrations Framework works, see Using Enterprise Service Management Integrations Framework and View tasks of a third-party system
- Integrate Approvals hub integration with SAP Concur with ServiceNow, create credential records, and create connection records as explained in SAP Concur Spoke.
- Understand the basics of SAP Concur integrations and business processes.

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Note: The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming. To automate the RCA approvals for any record, you can run the EC bulk RCAs approval script where the source scope is one of the Employee Experience applications.

SAP Concur approvals workflow

By using the Employee Center Pro approvals experience, you can do the following actions:

- Sync the SAP Concur expense reports to the **My tasks** page on Employee Center Pro.
- View and manage the expense reports, expense line items, receipts, itemizations, and comments.
- Enable approvers to perform quick actions such as approve or send back a request with comments.
- Leverage Concur user flows and approval flows from approvals hub.

Manage approvals from SAP Concur

As an administrator, you can sync, view, track, and fulfill the requests from other business applications such as SAP Concur from a unified Employee Center Pro location.

Before you begin

Role required: sp_admin

About this task

View expense reports, itemizations, and receipts of the SAP Concur account from your ServiceNow instance.

Procedure

1. Navigate to **All** > **Employee Center** > **Concur Configuration** (sn_ex_cnc_concur_configuration).
2. Click **New** or update the existing configuration.
3. On the form, fill in the fields.

Configuration form

Field	Description
Base URL	Base URL of the instance. For example, assuming the base URL of `https://api.example.com/`, the `/reports` endpoint refers to `https://api.example.com/reports`.
Report relative path	Relative path of the report `/goto/expense-report/{report_id}`.
Active	Status of the web application. Only when a Concur configuration is active, the Concur Expense Reports table gets the report URL populated. The same URL is used by the **My task** page UI to redirect to Concur system.
Domain	Domain of the configuration. This field is automatically filled per the current domain and is used for domain separation. Per

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Field	Description
	domain, only one Concur configuration can be in active state.

4. Click **Save**.
   Configuration is complete.

Result
Base URL and relative path help display the fetched reports and expenses metadata from SAP Concur. The base URL and relative path help the approver navigate to SAP Concur from the respective approval or report for more details.

Populate SAP Concur report and metadata

As an administrator, fetch the reports metadata from other business applications such as SAP Concur. View the Concur expense reports, itemizations, and receipts from your ServiceNow instance.

Before you begin
Role required: sp_admin and sn_hr_integr_fw.admin

About this task
When you sync requests, you can view, track, and manage the pending requests from SAP Concur right from Employee Center Pro.

Procedure
1. Use one of the following methods to fetch the data.

   a. Navigate to **All** > **Integrations Framework** > **Source**, select **Concur Integration**, and click **Run Job** to fetch Concur expenses report.
   This job uses the **Fetch concur reports** service to fetch the user and report data using the available **Get concur reports** flow.

   b. Navigate to **System definition** > **Scheduled jobs** and run the **Pull concur reports** job to sync the updates automatically on a configured schedule or need-basis.

   By default, Concur reports are synced daily and the last three months data is fetched. Admin can configure the frequency of the schedule job.

   Note: To ensure you have the latest data from Concur, the daily scheduled job fetches the new records and any changes to the existing records.

2. **Optional:** Verify the progress of the job from **All** > **Integrations Framework** > **Job Tracker.**
3. **Optional:** Check the populated data from the following tables:
   - Concur Expense Report Staging (sn_ex_cnc_concur_report_staging)
   - Concur Expense Report (sn_ex_cnc_concur_report)
   - Concur User Mappings (sn_sap_concur_spok_sap_concur_user_mappings)
   - Concur Sync Details (sn_ex_cnc_concur_sync_details)
   - Concur Expense Entry (sn_ex_cnc_concur_expense)
   - Concur Comments (sn_ex_cnc_concur_comment)

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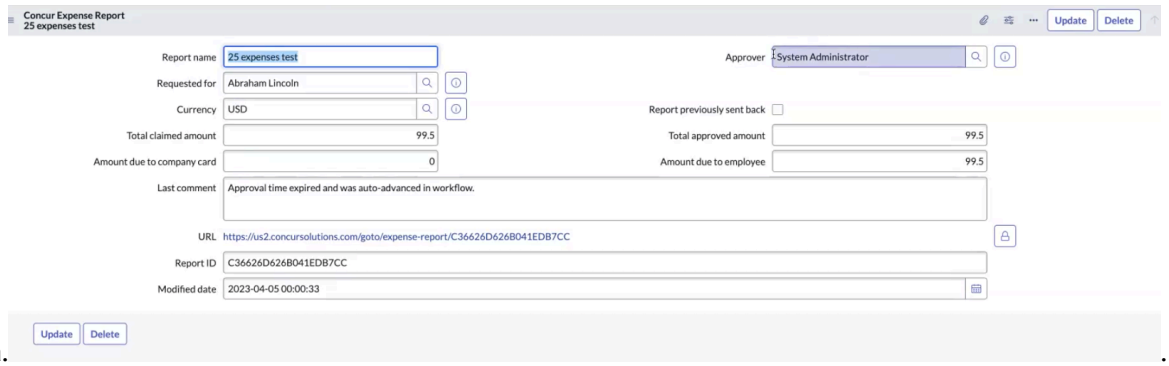
Note: Concur Expense Entry and Concur Comments data is populated real-time when the approver clicks the open request on the **My tasks** page.

The tables show the expense reports and related metadata. See the sample Concur expense report and its



metadata.

Trouble?
If reports do not appear on the Concur Expense Report (sn_ex_cnc_concur_report), check the credentials (oauth_2_0_credentials) with names *`SAP Concur`* and *`SAP Concur v4 Credentials`*. If credentials are fine, check **Get concur reports** flow execution for more information.

Result

The SAP Concur integration syncs the requests automatically and displays the pending open requests on **My tasks**.

What to do next

You can navigate to **All** > **Employee Center** > **SAP Concur Spoke** > **Concur Sync Details** to check the timestamp of the last sync.

- Only the open requests are displayed on the approvers **My tasks** page.
- Changes to the reports and requests reflect when the approver selects the open task.
- (Optional) You can disable the scheduled job by marking the job inactive from **System Definition** > **Scheduled job**.

Proceed to To-dos Configuration and use the default **Approval | SAP Concur** task configuration.

Use task configuration for SAP Concur approvals

Using the default To-dos configuration, you can provide the approvers with more in-context information about the approval requests for better approval workflows.

Before you begin

The following **To-dos Configurations** (sn_hr_sp_todos_config) are available by default.

- Concur Expense Report - Approval
- Concur Expense Report - Completed

To-dos configurations are based on **Pulled Integration To-do** table and show Open and Completed concur approvals on My tasks. For more information on task configuration, see Enable task configuration for approvals

Role required: sn_hr_sp.esc_admin

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Procedure

1. Go to **All** > **Employee Center** > **Administration** > **To-dos Configuration**, click an existing to-dos configuration, and navigate to the **Task Configuration** related list.
2. Click **New** or edit an existing task configuration record such as **Approval | SAP Concur**.
3. Understand the configuration as explained in Enable task configuration for approvals
4. Use the default configuration or modify per your business requirements.
   - Use the condition builder to specify the conditions that a task must meet to appear on the to-dos page. For example, Todo state is *open*, Source table is *sn_ex_cnc_concur_report*, and Active is *true* and so on.
   - Table name configured in the to-dos configuration to which the task config is associated *Pulled Integration To-do [sn_hr_integr_fw_todo_inbound]*.
   - Reference table is **Concur Expense Report** [sn_ex_cnc_concur_report].
   - Use the {reference_table.name},{reference_table.report_created_date}, {reference_table.approval_status_name} fields to display the table name, created date, and status.
   - Ensure you configure the widget parameters to suit your requirements. For example, set the *showItemizations* and *showAttachments* value to **true** to show attachments and itemizations. When *showReportTotals* is true, the report shows the sum total of all the expenses.
5. Use the default tab configuration **Expenses** and **Comments**or modify to suit your requirements.
   - The **Expenses** tab shows all expenses for Concur report. Widget is **Concur Expenses** and **Concur Expenses Mobile**. You can see Itemizations and receipts.
   - The **Comments** tab shows all comments for Concur report. Widget is **Concur Comments**.
6. Click **Actions** to search and select the required action group.
   Select the **Concur actions** to display the frequently used actions such as **Approve**, **View receipts**, and **Send back**. For more information, see Action framework.
7. Click **Submit** or **Update**.

Result

Based on this configuration, the approvers see the in-context information about the Concur approval and process the approval. For more reference info, see Approvals experience reference.

What to do next

Approver users can see information and process the approvals. For more information, see Use approval experience

Approvals hub integration with Workday

Enable easier access to all active approvals of external business applications such as Workday from Employee Center Pro. The Workday spoke is built by Bristlecone, Inc.

Using Approvals hub integration with Workday, you can perform the following actions from Employee Center Pro:

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- Pull employee information from Workday for time off requests, correct time off request, leave of absence, timesheet, job change, job requisition, termination, spend authorization, and compensation details to a ServiceNow application.
- View the Workday information from your ServiceNow instance.
- Enable approvers to view, reject, and approve the tasks right from Employee Center Pro.

Application setup

Ensure you have the latest versions of the following plugins:

- Employee Center Pro
- HR Service Delivery Integration with Workday 3.0.0

> **Note:** Upgrade v2.0.6 to v 3.0.0

- Workday HR Spoke
- Human Resources Scoped App: Core (com.sn_hr_core)
- Enterprise Service Management Integrations Framework. This framework is installed with Employee Center Pro.

Prerequisites

Before you start working on the Workday integration, get familiar with the following steps.

- Ensure you have the HRSD pro/Enterprise license that includes EC Pro. Workday integration is not available for Employee Center Pro standalone.
- Understand how Enterprise Service Management Integrations Framework works, see Using Enterprise Service Management Integrations Framework and View tasks of a third-party system
- Integrate Workday with ServiceNow, as explained in Workday HR Spoke and Connections and Credentials.
- Activate and run the schedule flow that pulls record details. For more information, see Activating schedule flows.
- Understand the installed components as explained in Components installed with HR Service Delivery Integration with Workday
- Understand the basics of Workday integration and business processes.

> **Note:** The RCAs that are generated after the installation are in the **Requested** state and you must manually mark the RCAs as **Allowed**, which can be time-consuming. To automate the RCA approvals for any record, you can run the EC bulk RCAs approval script where the source scope is one of the Employee Experience applications.

Workday approvals workflow

Improve productivity by managing third-party approval flows from Employee Center Pro. Here is a list of the supported Workday todos configurations.

Workday supported tables

Todos configuration	Table name
Job Change Request Todos	sn_hr_workday_job_change_request_todos
Job Requisition Request Todos	sn_hr_workday_job_requisition_request_todos

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Workday supported tables (continued)

Todos configuration	Table name
Leave Of Absence Request Todos	sn_hr_workday_leave_of_absence_request_todos
Spend Authorization Request Todos	sn_hr_workday_spend_authorization_request_todos
Termination Request Todos	sn_hr_workday_termination_request_todos
Time Off Request Todos	sn_hr_workday_time_off_request_todos
Correct Time Off Request Todos	sn_hr_workday_correct_time_off_request_todos
Timesheet Request Todos	sn_hr_workday_todo
Compensation Change Request Todos	sn_hr_workday_compensation_change_request_todos

By default, todos configurations are available for **Open** and **Completed**.

Note: For more information the field-level info about leaves, timesheets, timeoffs, compensation change, job change, job requisition, or leave of absence, see Workday HR Spoke.

For additional reference information, see Approvals experience reference.

Fetch Workday reports

As an administrator, fetch the reports metadata from other business applications such as Workday. View the Workday reports, leaves, compensation, and other information from your ServiceNow instance.

Before you begin

Role required: sn_hr_workday.admin, sp_admin, and sn_hr_integr_fw.admin

Procedure

1. Navigate to **All** > **Workday Pull To-dos** > **Configuration Workday Approval Todos** and set the **Active** value to **True** to run the reports.
2. Configure the **Load interval** and **Initial load start date time** as explained in Configure Workday to-dos.
3. Activate the schedule flow that pulls data from Workday as explained in Activating schedule flows.
   Based on the configuration and permissions, the data with new records and any changes to the existing records is pulled into the staging records.
4. Verify the progress of the job from **All** > **Workday Pull To-Dos** > **Workday Integration Job Tracker.**
   For more information, see View job tracker details from Workday and View tasks from Workday.
5. Navigate to **All** > **System Definition** > **Tables** to check the staging, todos, and todos items records.
   Here is an example for Compensation change request. You can see the similar records for other to-do configurations.

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- Compensation Change Request Staging [*sn_hr_workday_compensation_change_request_staging*]
- Compensation Change Request ToDos [*sn_hr_workday_compensation_change_request_todos*]
- Compensation Change Request ToDos Items [*sn_hr_workday_compensation_change_request_todos_items*]

6. See the sample Workday report and its metadata.
   After data is pulled into staging tables, use transform maps to move data into target tables.

   Note: If event data does not appear on the Workday event table, check the Workday credentials. If credentials are fine, check **Run Workday Integration Flow** flow execution and **Workday Pull-Todos Scheduled Import** subflow execution for more information.

7. Use transform maps and verify data relationships between source table and target table as explained in Use transform maps.
   The fetched data is now transformed for display on **My tasks**.

   Note: When the todos do not load on my tasks page, verify the data transformation in the staging, todos, and todos items records. If you see issues, see credentials and flow execution for more information.

Result
The Workday integration syncs the requests automatically and transforms the data to display the pending Workday open requests on **My tasks**.

What to do next
Proceed to **To-dos Configuration** and use the default **Approval | Workday** task configuration.

For data protection, use the default purge policy to delete data more often. By default, data purge happens once in 30 days.

Note: To protect sensitive data, ensure you remove the HR administrator role from IT administrator. This step ensures that only the HR administrator [sn_hr_core.admin] has access to the sensitive information. Ensure only the HR administrator [sn_hr_core.admin] has access to the sensitive information as explained in Remove HR Administrator role from IT System Administrators

- Only the open requests are displayed on the approvers **My tasks** page.
- Changes to the reports and requests reflect when the approver selects the open task.

Configure Workday to-dos

Store one-time configuration parameters to pull tasks from Workday into the ServiceNow application.

Before you begin
Role required: sn_hr_workday.admin

Procedure
1. Navigate to **All** > **Workday Pull To-dos** > **Configuration Pull To-dos**.
   For information on the Pull to-dos report creation, see this KB article.
2. On the form, fill in the fields:

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Workday Configuration Pull To-Dos

Field	Description
Workday to dos RAAS report name	Name of the report that is pulled from Workday. **Note:** Make sure you provide the exact name of the report for proper synchronization.
Workday to dos report owner username	Owner of the report. **Note:** Make sure you provide the exact name of the owner for proper synchronization.
Initial load start date time	Date and time from which you want to pull todos from Workday into ServiceNow.
Load Interval	Interval in which you want to pull data, for example, in terms of days or months or hours. Example: For initial load, if you want to pull data from the last six months, then you can set the load interval as 15 days. Data is pulled from the last six months (in a set of 15 days) till the starting time captured in the **Job Started at** field in Job tracker. In case the data is large, an outbound call timeout error is displayed in ServiceNow. You must then decrease the load interval. If a schedule flow is run for every 12 hours, then data is always pulled till current time.

Use task configuration for Workday approvals

Using the default To-dos configuration, you can provide the approvers with more in-context information about the approval requests for better approval workflows.

Before you begin

To-dos configurations are based on **Pulled Integration To-do** table and show **Open** and **Completed** approvals on **My tasks**. For more information on task configuration, see Enable task configuration for approvals

Role required: sn_hr_sp.esc_admin

Procedure

1. Go to **All** > **Employee Center** > **Administration** > **To-dos Configuration**, click an existing to-dos configuration, and navigate to the **Task Configuration** related list.
2. Click **New** or edit an existing task configuration record such as **workday**.
3. Understand the configuration as explained in Enable task configuration for approvals for more contextual info about the request.
4. Use the default configuration or modify per your business requirements.
   Table name configured in the to-dos configuration to which the task config is associated *Pulled Integration To-do [sn_hr_integr_fw_todo_inbound]*.
5. Use the default tab configuration or modify to suit your requirements.

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- The **Details** tab shows all the additional information about the request.
- The **Comments** tab shows all comments about the request.
- The **Attachments** tab shows all attachments about the request.

6. Click **Actions** to search and select the required action group.
   Select the actions to display the frequently used actions such as **Approve** or **Reject**. For more information, see Action framework.
7. Click **Submit** or **Update**.

Result

Based on this configuration, the approvers see the in-context information about the Workday approval and process the approval. For more reference info, see Approvals experience reference.

What to do next

Based on the configuration, the approver can see information and process the approvals. For more information, see Use approval experience.

Configure E-signature for approvals

Approval with e-Signature plugin (com.glide.e_signature_approvals) enables users to approve requests by authenticating their login credentials.

Before you begin

Ensure you install Approval with e-Signature plugin (com.glide.e_signature_approvals) from **All** > **System Applications** > **All Available Applications** > **All**.

Role required: Admin

About this task

On activation, the **Approval with e-signature** plugin adds a prompt for credentials when an approver attempts to approve a request from the list context menu. Enable E-signature approvals on a table-by-table basis. For detailed information on the plugin, see Approval with e-signature.

For the OOTB approvals:

- Approval users are prompted with e-signature before approving or rejecting the item.
- Approval users can add comments first and without the e-signature.
- When you cancel the e-signature, the task remains in the pending tasks.
- When you approve with an e-signature, the task progresses to the completed section.

E-signature approvals provide security, compliance, and accountability by introducing the ability for users to enter login credentials before taking an action.

Procedure

1. Navigate to **All** > **System Definition** > **e-Signature Registries**.
2. In **Table name**, select an existing table from the drop-down list.
   - **Table**: A table list to select the table that requires e-signature.
   - **Enabled**: On selection, an e-signature is required. Clear this option to remove the e-signature requirement.
3. Select **Save**.

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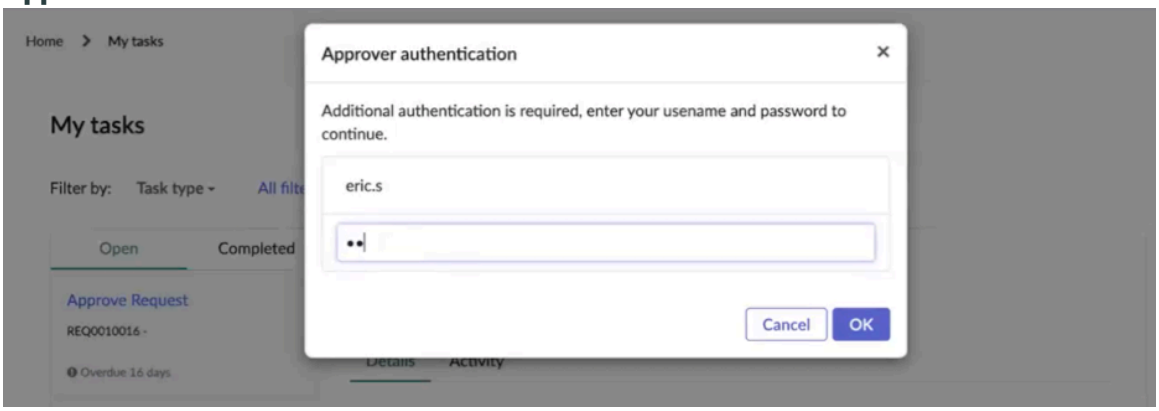
Result
When you select a table (sc_request) and enable the e-signature, the approvers can perform the approve or reject actions only after a successful user credential authentication. The approver authentication window redirects to the identity provider login screen for an SSO enabled instance.

Approver authentication



Note: When you do not upgrade to the latest employee center, you do not see the authentication window.

For more information on approvals, see Use approval experience.

App Launcher

App Launcher enables you to provide employees one-click access to all of their web business applications from Employee Center.

Sync all your business applications from Azure AD and non-SSO, register the custom applications manually, and enable employees to access these applications. You can access the applications from the Employee Center home page widget in context from dynamic topic pages and through search.

App Launcher improves your employee productivity by reducing effort in discovering apps and eliminating the need for using the single-use case SSO dashboards. Using application launcher with the Employee Center Pro, you can manage the following types of applications:

- **SSO Integrated Apps**: App Launcher offers pre-built integration with Azure AD. If you use Microsoft Entra ID as an identity and access management tool, you can automatically sync the registered applications in your Azure AD account to the App Launcher. Only applications to which the users have access in SSO, such as Microsoft Entra ID, are displayed on Employee Center. The App Launcher framework enables you to integrate with other SSO vendors and sync registered applications. See Integration Hub for the availability of the required spokes, actions, and the license requirements.
- **Custom web applications (Non-SSO)**: Register the applications manually which are not registered in SSO. Register the apps in the Web Application table and define the user criteria to control the visibility.

SSO and non-SSO app configuration

Configure both SSO integrated Apps and Custom registered apps on the Home page widget or topic page, manage the widget preferences, and associate applications to the topics. As an administrator, you can register applications, sync available applications, and give one-click access to the applications. You can associate topics to the applications to launch useful applications right from within Employee portal.

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- Create a unified application launcher that can increase employee productivity.
- Configure the integration such as sync SSO-applications, register custom applications, and assign applications to users or groups.
- Assign custom applications based on the role, location, business unit, team, and other criteria.
- Define the visibility and access to applications based on the user, user group, and other criteria.
- Integrate Azure AD and sync the registered applications from connected Azure AD account.
- Associate application to topics for in-context app discovery.
- Browse applications by **Favorite**, **Featured**, **categories**, and **Recent**.
- Improve employee productivity and experience.
- App launcher is an Employee Center Pro feature.

My applications user experience and personalization

Organize applications on the App launcher for better app discovery and quick access. Enhance the user experience by simplified browsing experience using Featured, Recent, Categories, and Favorites groups. These features are enabled by default however admins can disable the option or adjust the display preferences.

- **Categorization**: Admins can map the applications to a suitable category such as finance, IT, events and more. You can create categories and assign the app to one or many app categories.
- **Featured**: Admins can use this option to promote new or important or seasonal applications for higher visibility. Tag important applications as featured for better visibility. Featured applications have visibility preferences and appear on the top of the page despite any filters or sorting.
- **Favorites**: Employees can mark the applications as favorite for easy access. Bookmark the apps you use frequently for quicker access.
- **Recently opened**: Employees can navigate to the recently opened apps from the recently open section.

Application access and visibility

Enhance application discovery and navigation on the App launcher by configuring the access and visibility settings. Understand how access control can improve the app discovery for employees and find relevant apps that they have access to.

For more information, see Configure application visibility and access.

App Launcher integration with AI search

Understand how AI Search is integrated with App launcher for better application discovery and access, see Configure search navigation tabs.

Ensure you understand how to configure and enable AI search capabilities, see the following AI Search topics:

- Configuring AI Search
- Configuring navigation tabs in AI Search
- Search sources

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Related topics

- Register custom web applications with app launcher
- Assign topics to web applications
- Sync your applications from Microsoft Entra ID
- Modify app launcher widget display
- Access applications from App Launcher
- Configure application visibility and access

Sync your applications from Microsoft Entra ID

As an administrator, you can sync your single-sign-on applications and give one-click access to the applications. You can associate topics to the applications to launch useful applications right from the portal.

Before you begin

Role required: sp_admin and admin

- The App Launcher synchronization of applications from Azure is compatible only with the latest Microsoft Entra ID spoke version. Ensure that you upgrade the existing Azure AD spoke to sync the apps with your web applications.
- Azure AD integration enables your employees to access and manage pre-integrated apps.
- Integrate Azure AD spoke with ServiceNow, create credential records, and create connection records as explained in Azure AD spoke setup
- Understand the basics of Azure spoke and service principals.
- Enable easier access to all active apps with valid entitlement in SSO without asking for login credentials.

About this task

By using the App Launcher with Employee Center Pro, you can do the following actions:

- Sync the registered applications from the connected Azure AD account to your applications widget.
- Enable access to the applications based on user permissions for Azure identity management.
- Manage all active applications of Azure AD in your instance.
- Configure the application integration such as add, create, and assign applications to users or groups.
- Change the app icon, label, and link or mark the app as inactive.

Azure AD integration enables your employees to access and manage pre-integrated apps.

Procedure

1. Navigate to **All** > **Employee Center** > **Web Applications**.
2. To fetch applications from the Azure account, click **Update applications**.
   All the Azure applications appear. See the following information:

List of applications

Field	Description
Name	Name of the web application

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Field	Description
Description	Description for the web application. **Note:** For Azure apps, the description is empty due to an Azure API limitation. However, you can manually add the description.
Active	Status of the web application. Only active applications for the user are displayed.
Categories	Category to which the application is assigned. You can create categories and assign the app to one or many app categories.
App source	Source of the application: Azure: Applications that are synchronized by administrators who use external integrations such as Azure.
Application URL	URL of the application
Application icon	Icon of the application When a brand icon isn't configured, a default icon appears. **Note:** Ensure you configure a brand icon for the application for better user experience.
Application icon URL	URL of the application icon
Available for	User group for whom the app is available. Define and select the user group based on your business needs. This field is applicable only for custom applications. Application visibility and access are based on your configuration of the **Available for** option. **Note:** When you mark an application as **Available for** a user, the app is visible and accessible in the search results.
Not available for	User group for whom the app is unavailable. Values that are defined at the **Not available for** take precedence over **Available for**. This field is applicable only for custom applications. Application visibility and access are based on your configuration the **Not available for** option.

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Field	Description
	Note: When you mark an application as **Not available for** a user, the app is not visible and accessible in the search results.
Is record updated	Record update setting to indicate if the Azure app record is manually updated. The value changes to true on manual changes. For custom apps, the default is false. **Note:** This field is applicable only for apps that are synchronized with the Azure integration.
Featured	Option to mark the application as featured. Use the **Featured** option to promote new or important or seasonal applications for higher visibility. **Note:** Featured applications have display preferences and appear on the top of the page despite any filters or sorting.

Note: API throttling limits vary based on multi-tenant or single-tenant configuration.

3. Click **Save**.
   Applications are fetched. You can proceed to associate topics that are suitable for the application.
4. To assign the topics to the applications, see Assign topics to web applications.

Result

When you sync applications, you can see the list of Azure apps and track the flow execution status from the related link on the page.

What to do next

To sync the latest apps, you can do the following actions:

- Click **Update applications** from **All** > **Employee Center** > **Web Applications** to sync the updates instantly with the sn_hr_sp.esc_admin role. When you update apps, you can track the flow execution status from the related link on the page.
- Run the **Fetch applications** schedule job from **System definition** > **Scheduled jobs** to sync the updates automatically on an as needed-basis or once a day.

For upgrades: When you have an existing Azure AD spoke and connection and upgrade to the employee center pro with the App Launcher, the apps get synced through a job automatically and are updated nightly. To disable the fetch applications job, you must mark the job as inactive from **System Definition** > **Scheduled job**.

```
Scheduled Job: Fetch applications
table: sysauto_script
sys_id: 48b46a8a4744c1109dcae052846d43cf
```

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Based on the user permissions, service principals, and the applications that are mapped with the Azure service principals, the applications are displayed on the App Launcher. Verify the service principals from the Azure app service principals.

- When user access permissions change at the Azure side, the updates are synced real-time on the applications widget. To see the changes, re-login to your Azure account.
- Changes to the app metadata reflect only after the next sync.

Note: When an application is hidden, users still have permissions to the application until the next synchronization.

App launcher integration with Okta

Using OOTB integration with Okta, you can automatically sync the registered applications from Okta and give your employees one–click access to a personalized list of assigned applications. Your employees can easily access all the active apps with valid entitlement in Okta without specifying the login credentials.

Before you begin

- The app launcher sync of applications from Okta is only compatible with the latest Okta Spoke version. Ensure you upgrade the existing Okta spoke to sync the apps on to your web applications.
- Integrate Okta spoke with ServiceNow, Inc., create credential records, and create connection records as explained in Okta spoke setup.

Role required: sp_admin, taxonomy admin, or taxonomy manager

About this task

After the spoke setup, Okta applications are synced on daily basis to a web application table from the Okta account. To sync the latest applications, you can do the following:

- As sn_hr_sp.esc_admin, navigate to **All** > **Employee Center** > **Web Applications** > **Update applications** to sync the updates instantly.

  When you update applications, you can track the flow execution status from the related link on the page.

- As an admin, sync the updates automatically on need-basis or once everyday by running the **Fetch applications** schedule job from **System definition** > **Scheduled jobs**.

Procedure

1. Navigate to **All** > **Employee Center** > **Web Applications**.
2. Fetch applications from the external integrations Okta, by clicking **Update applications**.
   All the Okta applications appear with the following information:

Applications

Field	Description
Name	Name of the web application
Description	Description for the web application.
Active	Active indicates the status of the application. Only active applications for the user are displayed.

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Field	Description
Categories	Category to which the application is assigned. You can create categories and assign the app to one or many app categories.
App source	Source of the application. Okta applications synced by admins using integrations.
Application URL	URL of the application
Application icon	Icon of the application
Application icon URL	URL of the application icon
Is record updated	Record update setting to indicate if the Okta app record is manually updated. The value changes to true on manual changes to **Name** and **application URL**. For custom apps, the default is false. **Note:** Applicable only for apps synced with the Okta integration.
Featured	Option to mark the application as featured. Use the **Featured** option to promote new or important or seasonal applications for higher visibility. **Note:** Featured applications have display preferences and appear on the top of the page despite any filters or sorting.

Applications are fetched. You can proceed to associate topics suitable for the application.

3. Assign the topics to applications by following the steps from Assign topics to web applications.

Result

When you sync applications, you can see the list of Okta apps. Track the flow execution status from the *Okta flow execution status* related link on the page.

What to do next

For upgrades: When you have an existing Okta spoke and connection and if upgrade to the employee center pro with the App launcher feature, the apps get synced through a job automatically and are updated nightly. To disable the fetch applications job, you must mark the job to the inactive state from **System Definition** > **Scheduled job**.

```
Scheduled Job: Fetch applications
table: sysauto_script
sys_id: 48b46a8a4744c1109dcae052846d43cf
```

Based on the user permissions and the applications mapped with the Okta, the applications are displayed on the App launcher.

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- When user access permissions change on the Okta side, the updates are synced real-time on the applications widget. To see the changes, re-login to your Employee Center account.
- Changes to the app metadata such as Deletion, status change, or selecting *Do not display application icon to users* reflect only after the next sync. After sync, the apps are marked inactive and hidden from users.

Note: When an application is hidden, users still have permissions to the application until the next sync.

Register custom web applications with app launcher

As an administrator, you can register applications manually and give one-click access to the applications. You can associate topics to the applications to discover and launch useful applications from the topic page.

Before you begin

Role required: sp_admin, taxonomy admin, or taxonomy manager

Procedure

1. Navigate to **All** > **Employee Center** > **Web Applications**.
2. Click **New**.
3. On the form, fill in the following fields.

Applications form

Field	Description
Name	Name of the web application
Description	Description for the web application
Active	Active indicates the status of the web application. Only active applications for the user are displayed.
Categories	Category to which the application is assigned. You can create categories and assign the app to one or many app categories.
App source	Source of the application: ○ **Custom**: Applications registered by admins using the EC Web Application option ○ **Azure**: Applications synced by admins using external integrations such as Azure.
Application URL	URL of the application
Application icon	Icon of the application When a brand icon isn't configured, a default icon appears. **Note:** Ensure you configure a brand icon for the application for better user experience.

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Field	Description
Application icon URL	URL of the application icon
Available for	User group for whom the app is available. Define and select the user group based on your business needs. Applicable only for custom applications. Application visibility and access are based on your configuration of the **Available for** option. **Note:** When you mark an application as **Available for** a user, the app is visible and accessible in the search results.
Not available for	User group for whom the app is unavailable. Values defined at the **Not available for** take precedence over **Available for**. Applicable only for custom applications. Application visibility and access are based on how you configure the **Not available for** option. **Note:** When you mark an application as **Not available for** a user, the app isn't visible and accessible in the search results.
Is record updated	Record update setting to indicate if the Azure app record is manually updated. Value changes to true on manual changes to the app record. For custom apps, the default is false. This flag is internally used to exclude specific modified application from the regular data sync job. **Note:** Applicable only for apps synced with the Azure integration.
Featured	Option to mark the application as featured. Use the **Featured** option to promote new or important or seasonal applications for higher visibility. **Note:** Featured applications have display preferences and appear on the top of the page despite any filters or sorting.

For more information, see Configure application visibility and access.

4. Click **Submit**.
   The application is registered. You can proceed to associate topics suitable for the application.

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5. Follow the steps from Assign topics to web applications to assign the topics to applications.
6. Click **Update** to assign the topics to an application.
7. Define the **Order** score to determine the display of the applications on the topic page.
   - By default, the applications appear in alphabetical order. On use, the display order changes by **Recent use** on the home page widget.
   - For display preferences, configure the order sequence per your organizational needs.

   You can register multiple applications based on your requirements.

Result
When you create applications, you can see the list of custom apps.

What to do next
Your employees can access all applications and associated topics. See Access applications from App Launcher.

Configure application visibility and access

Enhance application discovery and navigation on the App launcher by configuring the access and visibility settings.

Before you begin
Role required: Admin, ESC admin, and taxonomy manager.

Ensure you configure and enable AI search capabilities, see the following AI Search topics:

- Configuring AI Search
- Configuring navigation tabs in AI Search and tag **ESC Portal Default Search Application**

About this task
Administrators can control user access by specifying who can and can't use the application. You can specify the users for whom the application is **Available for** and **Not Available for**.

- Improve the app discovery for employees to find relevant apps more quickly and easily.
- Enhance the application discovery from a unified search experience with the **Applications** tab in search results.
- Define the user access controls to ensure users see and access only the authorized applications.
- Increase adoption and productivity for registered and custom applications:
  - For Azure and Okta integrated apps, user access must be cached at the first load of the App launcher.
  - For custom apps, permissions must be evaluated in real-time for each search.

Note: You can use this feature base system with the default ESC search profile. For existing users with custom search config, ensure you manually map the changes to the custom search profile.

Procedure
1. Navigate to **All** > **Employee Center** > **Web Applications**.
2. Click **New**.
3. Configure the **Application** form as explained in Register custom web applications with app launcher.

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4. Configure the user access control options for application visibility and access.
   - **Available for**: Users or user group for whom the application is accessible and visible.
   - **Not available for**: Users or user group for whom the application isn't accessible and visible.
5. Click **Submit** or **Save**.

Result

Based on the configuration, the applications are made visible to the employees both from the app launcher and from AI search results.
When an application is configured **Available for** a user, the search results show the application cards with name, icon, description, and link to the relevant applications that the user has access to.

Note: When the app doesn't have a configured brand icon, a default icon appears.

App Launcher and AI search results

Note: When you mark an application as **Not Available for** a user, the application tab on the search results indicates the count. However, the user can’t see or navigate to the application due to user permissions.

For more information on Application security directive changes, see App Launcher

Related topics

Manage favorites

Assign topics to web applications

Associate topics to the applications which can help discover and launch useful applications right from topic page.

Before you begin

Role required: Taxonomy admin, taxonomy manager, and taxonomy contributor

Procedure

1. Go to **Web applications** > **Application topics** > **New**.
2. In the **Select a Topic** dialog box, perform the following steps:
   a. From the Taxonomy list, select suitable taxonomy.
   For example, **Employee**.
   The list of all the topics associated with the selected taxonomy is displayed.
   b. Select the topic or subtopic that you want to assign to the application.
   c. Click **OK**.
3. Click **Update** to assign the topics to an application.

What to do next

Your employees can access all applications and associated topics. See Access applications from App Launcher

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Modify app launcher widget display

Access all the useful applications from a unified application from the **Applications** widget from your employee portal. You can see a list of related applications when you browse topics and launch the application.

Before you begin

Role required: sp_admin

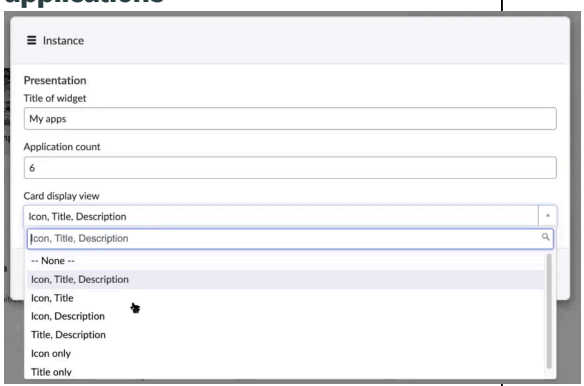
About this task

Using the app launcher in Employee Center Pro, You can provide one-click access to the applications and configure the instance options to control the appearance of the widget, such as the icon and description. For more information, see App Launcher.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. To configure the appearance, press and hold the control key, right-click the **Applications** widget, and select **Instance Options**.
3. On the form, select the options:

Instance options for Applications

Field	Description
Title of widget	Title of the widget, for example **My applications**
Application count	Number of the applications you want to display on the widget (Upto 6 apps). **Note:** Defer load shows up to six loaders.
Card display view	Display view preference of the card. Either the app icon or the title is required with other options. **Instance options for web applications**  ○ Icon, Title, Description ○ Icon, Title ○ Icon, Description

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Field	Description
	○ Title, Description ○ Icon only ○ Title only
Load configuration	Order in which the page and widgets data loads. Select one of the following options: ○ Asynchronous: First the page loads, then the widgets data loads. Users see content appear in the widgets as soon as each individual widget loads. ○ Synchronous: Page and widget data loads at the same time. The page remains blank until all the data loads.
Show empty state	Option to show the widget with empty state message.
Widget behavior during high load	Option to show the view from the available options: ○ None ○ Lite view: Select this option to display a message that the portal is experiencing heavy usage. ○ Regular view: Select this option for regular view.

4. Click **Save**.
5. Click **View all** to see all the applications.

What to do next

After instance option configuration, your employees can access both custom and azure applications, manage the appearance of the widget, and access applications from topics.

App launcher user experience analytics

Visually analyze app usage, user behavior, and other information from the user experience dashboard.

You can use the dashboard to view the information about application usage, application engagement, and app launcher adoption. You can track the App launcher usage, analyze app adoption rate, and user activity to drive future business decisions.

Navigate to **User Experience Analytics** > **Dashboard** for a detailed view and analysis. Click the respective widget or chart for more information.

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User experience analytics dashboard

User and roles

Roles required for User experience analytics dashboard

Users	Required role
Analytics portal admin	portal_analytics_admin
Analytics viewer	analytics_viewer, mobile_analytics_viewer, web_analytics_viewer, portal_analytics_viewer

Widgets

The dashboard provides the following metrics:

- **Page Id**: Indicates the occurrences based on the page name from home page, topic page, and apps page.
- **App title**: Indicates the occurrences based on the title of the application.
- **App source**: Indicates the occurrences based on the application source such as custom, Okta, or Azure AD.

User behavior

View and analyze the information available in your dashboard by each app source, title, or page ID. You can track user behavior and app usage on the app launcher.

- View the applications that employees launch frequently.
- Track monthly and daily user activity.
- View number of user clicks by app from home page, topic page, and apps page.
- Analyze the trend of user activity periodically.
- Assess the user behavior and insights and drive business decisions.

Organization chart in Employee Center Pro

Using org chart, learn more about other employees and understand team structures at the organization.

You can offer a better org chart experience with the new org chart functionality available in the Employee Center Pro application. The newer org chart provides an updated UI experience and more configuration capabilities than the older org chart available in the Content Publishing application.

Note: Ensure that you install Employee Profile plugin 5.0.1 and opt in to the Employee Profile.

As an admin, you can perform the following org chart configuration steps:

- Enable the org chart viewer packaged with Employee Center Pro.
- Configure the eligible users and employee card display settings.
- Populate the direct report count and other report count through scheduled jobs.

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Note: If the other report count is zero, new reports aren't displayed until the count is updated by the scheduled job. For more information on running the job, see Update the report count based on eligible users.

- Display the total report count in the selected user card and skip level reports.
- Define quick actions based on the org chart action group.
- Add an employee role and manage the reporting hierarchy.

Note: Employee Center Pro customers get the new org chart on opting into the Employee Profile. Mark the Page Route Map record as active. All previous org chart links redirect to the new org chart. See Opt in to the employee profile for more information.

Related topics

Modify the org chart widget display

Configure eligible users for org chart

Define the eligible users to show up in the org chart. Admin can create a new eligible user configuration from one of the Users, HR Profile, and Employee Profile tables.

Before you begin

An active eligible user configuration is a condition that determines who can appear on the org chart. You can have only one active eligible user configuration per domain. Ensure you have only one active configuration.

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **Employee Center** > **Organization Chart** > **Eligible users**.
2. Click **New** or open an existing record.
3. On the form, fill in the fields.

Eligible User Configuration

Field	Description
Name	Name of the eligible user configuration record.
Order	Enter the order number to determine where the item appears in relation to other items
Application	Application that you want to configure the activity for.
Active	Option to activate the eligible user configuration record for use. Ensure you have only one active configuration for eligible users.
Table	Table that the eligible user configuration record is associated with. You can select from one of the following tables: ○ Default: Employee Profile ○ HR Profile: The HR profile table appears only when you install the Human Resources [com.sn_hr_core] plugin. ○ Users

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Field	Description
	Note: To display all users in your organization, you can model your eligible users on Users or HR Profile.
Conditions	Conditions that a user must meet to be an eligible user. For example, you can select users who are **Active** or employees joining the organization after a certain start date.

4. Click **Save**.

Result

Based on this configuration, only the eligible users appear in the Org Chart widget.

Note: When you have multiple eligible user configurations, ensure you deactivate the current active definition before activating the other.

What to do next

A scheduled job populates the direct and other report count periodically. You can run the **Populate Manager Reportee Count Using Eligible Users (Domain separated)** scheduled job on-demand to update the report count at any time. The counts change based on the eligible users or employee status. For more information on running the job, see Update the report count based on eligible users.

When an employee with direct reports becomes ineligible, the direct reports are tagged to the manager of such ineligible employee.

Related topics

Organization chart in Employee Center Pro

Configure card settings for org chart

Define the lines and information to show on the Employee Center Pro org chart card.

Before you begin

Role required: sn_hr_sp.esc_admin

Use **Org Chart Card Configuration** to define information to display on the chart. Define one user card configuration on the same table as the one used in the eligible user configuration.

Note: New hires appear in an org chart during the onboarding and when a sys_user record is created. You may configure the conditions to suit your business requirements.

You can configure two primary and six secondary slots of information on the card of an employee. Information is configured by selection or dot-walking the fields from the Employee Profile [sn_employee_profile], HR Profile [sn_hr_core_profile], or User [sys_user] tables.

Procedure

1. Navigate to **Employee Center** > **Organization Chart** > **User display** > **Org Chart Configurations Card**.
2. On the form, fill in the fields.

User Display Configuration

Field	Description
Name	Name of the user display configuration record.

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Field	Description
Application	Application that you want to configure the activity for.
Table	Table that the user display configuration record is associated with.
Show preferred pronoun	Option to show the preferred pronoun from the employee profile of the user on the org chart. Pronouns field appears only when you select the employee profile table.
Primary display fields	Primary fields to display on the org chart card. For Employee profile, defaults are user.name and user.title. Primary display fields appear on all user cards that includes the manager hierarchy, selected user card and direct reports, if any. User search results also display the information as per the primary display fields. **Note:** Configure two primary display fields.
Action group	Group of quick actions defined for org chart. For **Org Chart Group**, you can use actions such as view profile, email, or call. For more information, see
Order	Enter the order number to determine where the item appears in relation to other items

3. Click **Save**.
4. On the secondary field form, specify the required org chart fields configuration such as *`icon`* and *`display field`* to display as secondary fields on the selected employee card.

   Note: Configure upto six secondary display fields.

5. Click **Submit** or **Update**.

What to do next
For more information on widget instance options, see Modify the org chart widget display.

Update the report count based on eligible users

Update the direct and other report count by running a script execution job.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. On the scheduled jobs page, select the **Populate Manager Reportee Count Using Eligible Users** job.

   Important: If the Domain Separation plugin is activated on your instance, select the **Populate Manager Reportee Count Using Eligible Users [Domain Separated]** job.

3. On the scheduled script execution page, select **Execute Now**.

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Result
The report count is updated based on the eligible users and is populated in the organization chart.

Related topics
- Organization chart in Employee Center Pro

Modify the org chart widget display

The org chart widget displays the employees and organization hierarchy. You can configure the instance options to control the number of employees.

Before you begin
Role required: sp_admin or admin

Procedure
1. Navigate to **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Click a org chart on the primary navigation bar.
   The org chart page appears.
3. Press and hold the control key on the keyboard, right-click the browse topic widget, and then select **Instance Options**.
4. Configure the instance options.

Instance options for Org chart

Instance option	Description
Show direct report count	Count of direct reportees the employee has. Default: Selected
Number of direct reports to show	Number of items to show on a single page. The choices are 12, 24, and 36. Default value: 12
Minimum input length search	Number of letters that are required as a minimum input for search. Default: 1

5. Click **Save**.

Related topics
- Organization chart in Employee Center Pro
- Configure eligible users for org chart

Appointment Booking

Provide an omnichannel unified experience to your employees to schedule and manage appointments across multiple business units such as IT support, HR consultations, or other business units.

Configuring Appointment Booking

As an administrator, you can create categories and reasons for appointments. You can also configure the communication channels for the appointment based on the user location.

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You can leverage topics from the Unified Taxonomy for Employee Center to create appointment categories. For more information about Unified Taxonomy, see Unified Taxonomy for Employee Center.

The appointment booking experience leverages user criteria to display reasons that are relevant to the user. You can create new reasons and link them to location queues to use them for appointments. If you are using ITSM Walk-up Experience, you can reuse the existing reasons for appointment booking.

You can create location consent records to configure the communication channels and link them to a walk-up location queue to use them for appointment booking.

Note: To configure the appointment booking feature, you must install Employee Center Pro and activate ITSM Walk-up Experience. For more information about the plugins, see the following topics:

- Employee Center Pro
- Walk-up Experience

.

For more information about configuring the appointment booking feature, see the following topics.

1. Opt in to unified appointment booking
2. Create an appointment reason
3. Configure appointment communication
4. Map category and reasons to a location
5. Configure feedback for appointment booking
6. Configure page routing for appointment booking

Using Appointment Booking

As an employee, you can schedule an appointment from Employee Center or Employee Center Pro Kiosk. The option to schedule an appointment is available on the homepage under quick links, on a request form, and on a Knowledge Base article. You can select a category and reason for your appointment, and opt for a virtual or in-person appointment. You can also manage your appointments and give feedback about completed appointments.

For more information about using the appointment booking feature, see the following topics.

- Schedule an appointment
- Manage your appointments

Managing Appointments

After an employees books their appointment. As an agent, you can check all the appointments in the Service Operations Workspace or the Agent Workspace.

- To check the appointments in the Service Operations Workspace, do the following:
  1. Go to the **Service Operations Workspace**.
  2. From the navigation, select **List**.

     The **Default lists** and the **My lists** navigation is displayed. You can check your appointments from any of the lists.

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3. In the **My lists**, go to **Opened by link** > **Walk-up - Appointments**.

   You can also check the appointments from the **Default lists**. Go to **Default lists** > **Walk-up** > **Appointments**.

For more information, refer to Walk-up Experience management in Service Operations Workspace and Create an appointment through incident.

- To check the appointments in the Agent workspace, refer to . .

Opt in to unified appointment booking

Opt in to unified appointment booking and enable it for the Employee Center.

About this task

If you are using IT Service Management with Employee Center Pro, the default appointment booking experience in the Employee Center is the Walk-up Experience. You can opt in to unified appointment booking to allow bookings based on user criteria, categories, and reasons.

Note: If you are not using the ITSM Walk-up Experience with Employee Center Pro, unified appointment booking is opted in by default.

Before you begin

Role required: sn_hr_core.walkup_admin, sn_walkup.walkup_manager

Procedure

1. Navigate to **All** > **Employee Center** > **Appointment Booking** > **Setup**.
2. Select the **Yes, opt in to unified appointment booking** check box, then select **Opt-in**.

Create an appointment reason

Create a reason that employees can use to book an appointment.

Before you begin

Role required: sn_hr_core.walkup_admin, sn_walkup.walkup_manager

Procedure

1. Navigate to **All** > **Employee Center** > **Appointment Booking** > **Appointment Reasons**.
2. On the Walk-up Reasons for Visit list, select **New**.
3. On the form, fill in the fields, then save the record.

Walk-up Reason for Visit form

Field	Description
Reason	Title for the reason. The title is displayed in the list of reasons while booking an appointment on the Employee Center.
Active	Option to activate the reason record.

4. On the Available for related list, select the users or roles who must have access to the appointment reason.
   You can also use the Not available for list to select the users or roles who must not have access to the reason.

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What to do next

Add the reasons to the walk-up location queue that you want to use for appointment booking. For more information, see Create or modify Walk-up Experience locations.

Configure appointment communication

Configure the communication channels and location consent for appointment bookings.

Before you begin

Role required: sn_hr_core.walkup_admin, sn_walkup.walkup_manager

Procedure

1. Navigate to **All** > **Employee Center** > **Appointment Booking** > **Appointment Communication Configurations**.
2. On the Location Consent list, select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Location Consent form.

What to do next

Link the communication configuration to the walk-up location queue that you want to use for appointment booking. For more information, see Create or modify Walk-up Experience locations.

Map category and reasons to a location

Use the Unified Taxonomy for Employee Center to create appointment categories to group appointment reasons and map them to location queues.

Before you begin

Ensure that you have created the following records:

- Unified Taxonomy topic for Employee Center. For more information about Unified Taxonomy, see Unified Taxonomy for Employee Center.
- Walk-up location queue record that you want to map the reasons to. For more information about creating a walk-up location queue, see Create or modify Walk-up Experience locations.
- Appointment reasons that you want to link to the location queue. For more information about creating reasons, see Create an appointment reason.
- Location consent (communication configuration) record that you want to link to the walk-up location queue. For more information about configuring location consent (communication configuration), see Configure appointment communication.

Role required: sn_hr_core.walkup_admin, sn_walkup.walkup_manager

Procedure

1. Navigate to **All** > **Walk-up Experience** > **Administration** > **Walk-up Locations**.
2. On the Walk-up Location Queues list, select the record that you want to add the category to.

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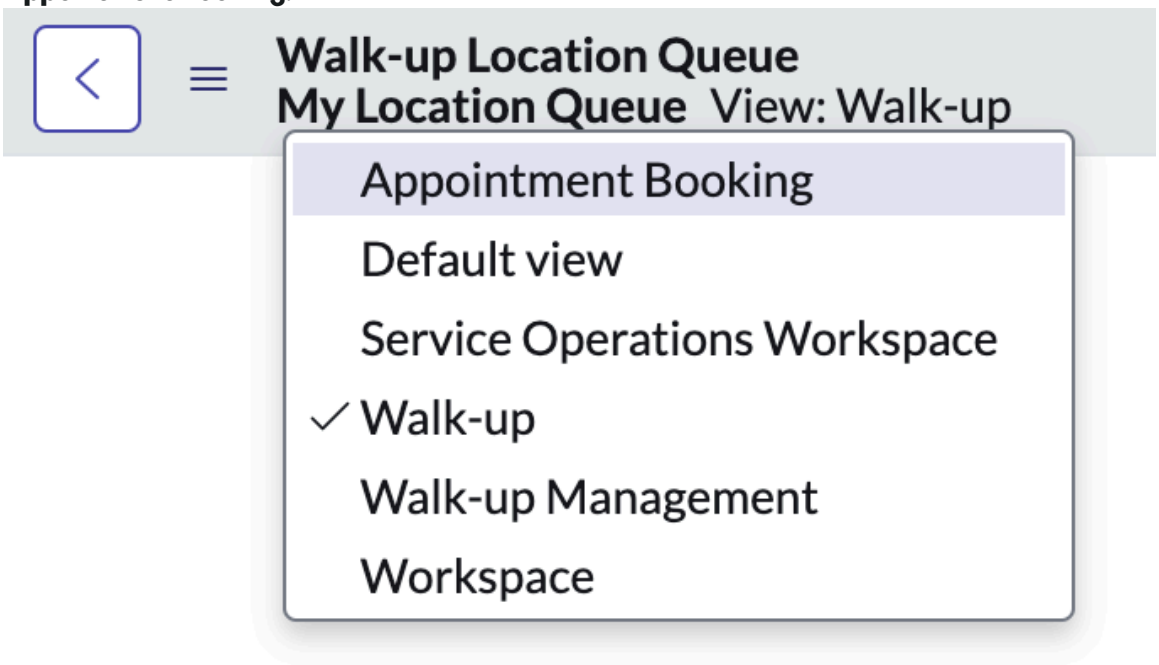
Note: To display the Topic and Location consent fields, change the view to **Appointment Booking**.



3. In the **Topic** field, select the taxonomy topic that you want to set as the category.

   Note: As an admin, you can disable the category field on the schedule appointment page by using the instance options.

4. In the **Location consent** field, select the location consent record that you want to set for the location.
5. Save the record.

   Note: The category and reasons are displayed in the application that is selected for the walk-up location record.

   The taxonomy topic and location consent are linked to the walk-up location. The topic is displayed as a category when a user wants to book an appointment.
6. On the Reasons for Visit related list, select **New**.
   The Walk-up Reason form opens. The **Location Queue** field is automatically set to the record that you navigated from.
7. In the **Reason** field, select the appointment reason that you want to link to the location queue. You can fill in the remaining fields based on your preference.
8. Save the record.
   The reason record is created and linked to the walk-up location.

Configure feedback for appointment booking

Create a feedback definition for appointment booking so employees can provide feedback for completed appointments.

Before you begin
Role required: sn_hr_sp.esc_admin

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About this task

The appointment booking experience already contains two feedback definitions for Employee Center Pro and Employee Center Pro Kiosk.

You can modify the feedback definitions provided with the plugin, or create your own. For more information about the feedback feature, see Integrated experience and service feedback.

You can modify the number of times a user can submit feedback in a single session by configuring the **Overlay session limit** field in the feedback configuration. The **Overlay session limit** value is set to 5 by default. For more information about feedback configurations, see Set up the feedback configuration.

If you create a custom feedback definition for appointment booking, ensure that you deactivate other feedback definitions that are on the same portal.

Procedure

1. Navigate to **All** > **Employee Center** > **Experience and Service Feedback** > **Feedback Definitions**.
2. On the Feedback Definitions list, select **New**.
3. On the Feedback definition form, enter the following field values.

Field values for appointment booking

Field	Value
Feedback type	Service - workflow
Widget mode	Modal
Channel	Portal
Portals	○ Employee Center ○ Employee Center Pro Kiosk **Note:** You can select one or both portals based on your requirement.

4. On the Page selection tab, in the **Included pages** field, select the following pages.
   - my_appointments
   - appointment_details

   You can fill in the remaining fields based on your preference. For a description of the field values, see Feedback definition form.
5. Save the record.
6. In the Trigger conditions related list, select **New**.
7. On the Trigger condition form, enter the following values.

Field values for appointment booking

Field	Value
Table	Walk-up Appointment [wu_appointment]

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Field	Value
User field	Opened by
Trigger randomly	Selected
Probability (%)	100

8. In the **Repeat Interval** field, ensure that all values are set to 00.
9. In the **Condition** field, enter the following values.

Condition for appointment booking

Field	Value
-- choose field --	State
-- oper --	is
-- value --	Closed Complete

10. Save the record.

Configure page routing for appointment booking

Configure page routing to redirect users to the appointment scheduling page.

About this task

When a user opts to schedule an appointment, the Appointment type page loads by default. The user can choose whether they want to schedule an appointment or join the walk-up queue. As an admin, you can configure the experience to skip the Appointment type page and redirect the user to the Schedule appointment page.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Page Route Maps**.
2. From the Page Route Maps list, select the **Appointment type to Appointment booking** record.
3. Select the **Active** field, then save the record.

Result

The page routing is configured to load the Schedule appointment page when a user opts to schedule an appointment.

Setup employee communications

Inform and engage your employees.

Employee Center Pro provides a robust suite of features to create, publish, and manage employee communications in a variety of content types and delivery channels. Follow these steps to setup employee communications features:

1. Make Content Publishing features available to content managers and employees: Properties installed with Content Publishing.
2. Set up content translation (optional): Configure Localization Framework for Content Publishing
3. Customize the out-of-the-box widgets (optional):

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- Modify the Content Experiences widget
- Modify the Featured News widget
- Modify the News feed widget

To view all the widgets installed with Content Publishing, see the widgets section of Components installed with Content Publishing.

For information on translating custom widgets, see Translate a client script message

To publish content to a custom widget, you must define the content type and associate it with your custom widget: Add or modify content type for Content Publishing

4. Review the Employee communications features table below and configure the features relevant to your use case.

Employee communications features

Feature	Description	Used with
Content Ownership	Define who has permission to create content, where they can publish it, and which employees can view it.	All employee communications
Content templates	Create a content template to enable content managers to create and publish higher volumes of news article content	News articles
Content engagement	Enable Content engagement to provide users with a way to comment and react to news articles and for managers to measure the effectiveness of their content using engagement metrics.	News articles
Video hosting integrations framework	Connect Content Publishing with a video hosting service, to make the hosted videos available for content authoring and publishing.	Microsites/Rich content
Reusable components	Configure the following reusable components: • Audiences for targeting content to users who meet specific criteria. • Content destinations for publishing news articles. • Content categories to organize news articles.	Microsites/Rich content, News articles and Portal content

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Related topics

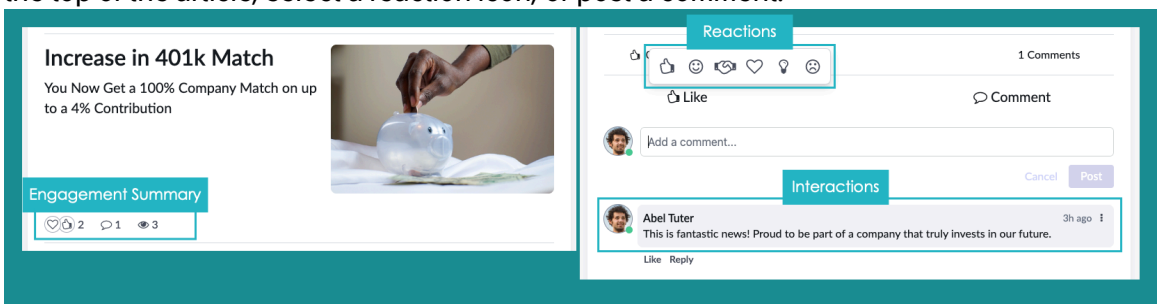
- Portal content
- Microsites
- News articles
- Managing content requests
- Creating campaigns

Content engagement

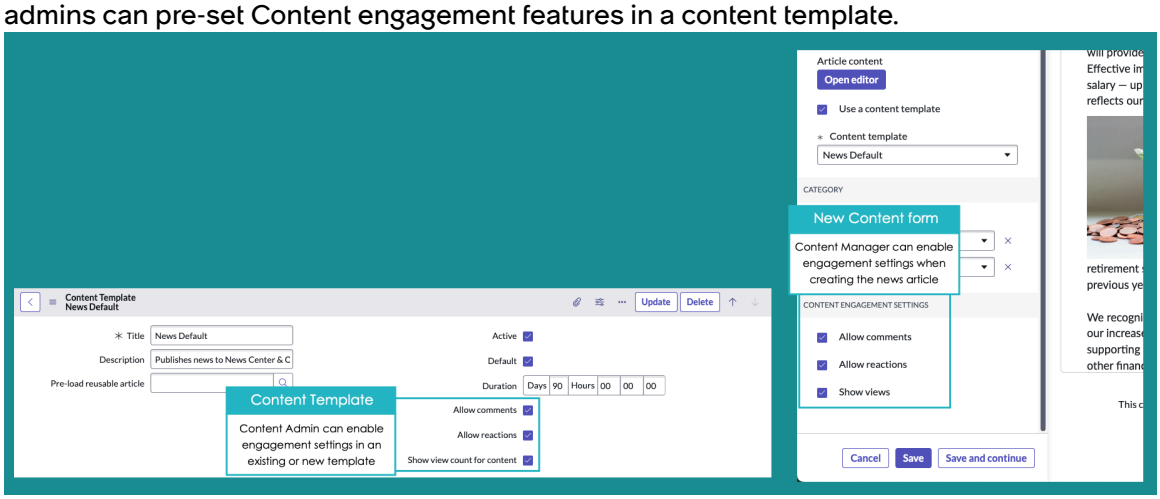
Content engagement enhances news articles by providing users with a way to comment and react to articles and for managers to measure the effectiveness of their content using engagement metrics.

Overview of Content engagement

Content engagement features are seamlessly embedded in news articles to enable employees to view engagement summaries at the top of the article, select a reaction icon, or post a comment.



Content managers can choose which content engagement features to enable when creating a news article. To enable faster news article publishing, content admins can pre-set Content engagement features in a content template.



Reporting content

Content engagement includes a comment reporting workflow, where employees can report a comment and content managers can view the reports and take appropriate action.

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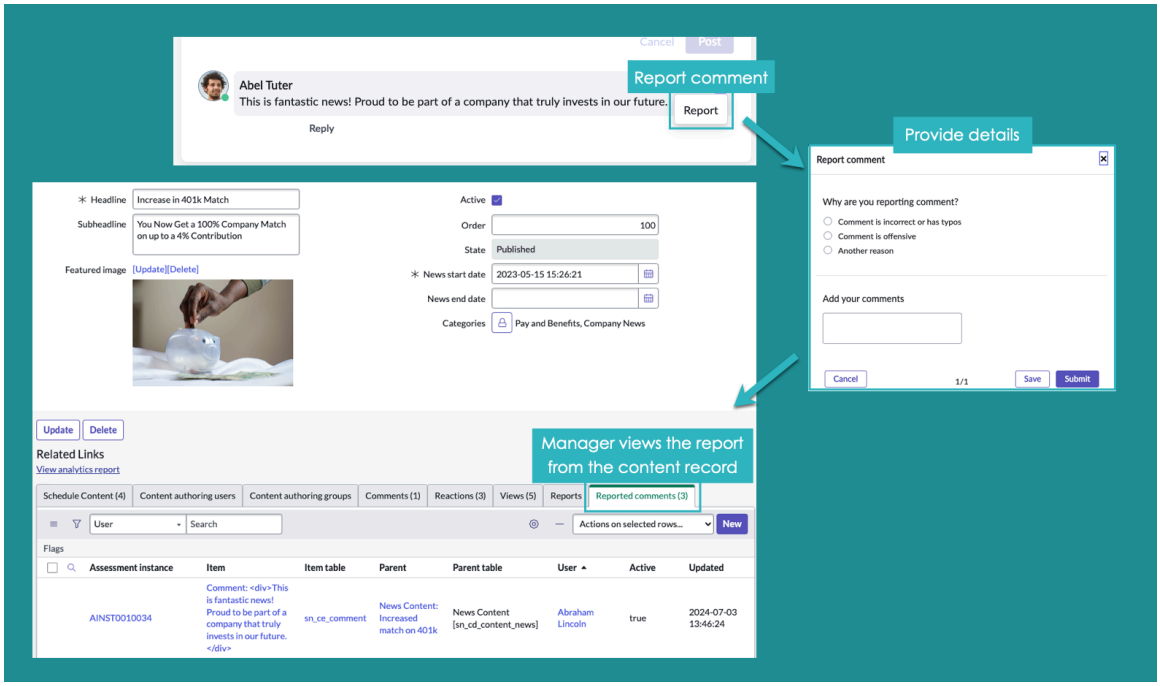

Engagement analytics

Content analytics provides visualizations for employee engagement metrics in the Content engagement dashboard.

Additionally, you can review visualizations for a specific news article, including total views count, engagement trends by day, and unique views by day. Navigate to the news article content item and click **View analytics report** in the hamburger menu.

Setting up Content engagement

Content engagement is installed as a plugin. The features are enabled through the Content Publishing properties and delivered to employees via news article widgets. Follow these steps to setup Content engagement:

1. Activate Content engagement
2. Enable Content engagement in Content Publishing properties: Properties installed with Content Publishing
3. Configure a custom reaction (optional)
4. Enable Content engagement in Content templates: Content templates (optional).

Configure a custom reaction

Content engagement utilizes font awesome icons to provide several out-of-the-box reactions for employees to interact with news articles. Engagement admins can customize the out-of-the-box reactions or configure their own.

Before you begin

Role required: Engagement admin [sn_ce.admin]

About this task

The system supports a maximum of six reactions. To create a custom reaction, you can either upload an .SVG or .PNG image file or specify a Font Awesome version 4.7 icon.

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Procedure

1. Navigate to **All** > **Content Engagement** > **Reaction Config**.
2. Click **New**.
3. Fill in the following fields:

Reaction configuration form

Field	Description
Name	System name for the reaction
Display text	Text that appears on the portal when the user hovers over or click a reaction icon
Font awesome icon	Name of the font awesome icon, as it appears on the website
Icon	Field to upload an .SVG or .PNG image file **Note:** If you enter a Font Awesome icon name in the previous field, you can skip this field.
Order	The order in which the icon appears when the user hovers over the **Like** icon on the portal relative to the other icons
Active	Makes the reaction available for users (enabled by default)

4. Click **Submit**.
   The custom reaction appears in the **Reaction Configs** list.

If you create a custom reaction, you must enable Content Publishing to access the reaction by creating an **App Reaction Config** record. You must repeat the following steps for each reaction that you want to make available to employees - including the out-of-the-box reactions.

5. Navigate to **All** > **Content Engagement** > **App Reaction Config**.
6. Click **New**.
7. Fill in the following fields:

Reaction configuration form

Field	Description
Reaction config	Select the reaction.
Application	Connects the reaction with the application. This value is set at the Application scope.
Active	Makes the reaction available for use.
Order	The order in which the icon appears when the user hovers over the **Like** icon on the portal relative to the other icons

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8. Click **Submit**.
   The reaction is now available for use in the portal.

Video hosting integrations framework

Connect Content Publishing with a video hosting service, to make the hosted videos available for content authoring and publishing.

Content Publishing offers content managers the ability to build content using videos from a video hosting service. The following components must be configured to add the video hosting service as an option in the Content library.

Note: Depending on your organization, either the content admin or a third-party vendor performs these steps.

Content provider

A content provider identifies the video hosting service.

Content Publishing versions 33.0.9 and later include the out-of-the-box provider "other", which enables organizations to skip configuration. Content managers can use this provider to add publicly available videos to microsites and news articles.

Content provider mapping

Content provider mapping makes the hosted videos available to a specific content type. Currently, only the rich content and news articles content types are supported.

Each content provider mapping is associated with a content provider and appears in the related list.

Content processor

Content processors provide an interface to configure API calls to the video hosting service. They are powered by subflows from the Flow Designer. For more information, see Building subflows.

There are two actions available:

- Authorize: enables employees to view private videos without providing credentials
- Search: adds a button to the Rich Content Editor interface that enables a content manager to view thumbnails of available videos, instead of copy-pasting the video URL.

Each content processor is associated with a content provider mapping and appears in the related list.

Content Rendering parameter

A content rendering parameter functions similarly to video hosting URL parameters, allowing content managers to customize the viewer's experience through an interface element in the Rich Content Editor. Depending on the hosting provider, this can include defining a checkbox for enabling full screen or autoplay, or a textbox for specifying the start time.

Each content rendering parameter is associated with a content provider mapping and appears in the related list.

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Set up content providers

The following process overview guides you through setting up content providers so content managers can use videos from video hosting services when assembling content.

1. The following domains are available out-of-the-box: youtube.com, player.vimeo.com, vimeo.com,players.brightcove.net, and brightcove.net.

   To configure an additional domain, the system admin must add the host domain to the `glide.html.enable_media_sites` system property. For more information, see Available system properties
2. Configure content provider and mapping
3. (Optional) If the video hosting service contains private videos that require credentials, Configure a video authorization
4. (Optional) To provide content managers with an interface where they can select a video, Configure video content search
5. (Optional) To add interface elements to the Rich Content Editor video picker, Configure content rendering parameter

Configure content provider and mapping

Connect a video hosting service to Content Publishing by configuring a content provider, then mapping the hosting service to specific content types, including rich content, news article, and styled content.

Before you begin

Role required: sn_cd.content_admin

Procedure

Create a new content provider record to identify the hosting service.

1. Navigate to **All** > **Content Publishing** > **Content Provider Configs** > **Content Providers**.
2. Click **New**.
   Fill in the form fields:

New content provider form

Field	Description
Name	Enter a name to identify the content provider when creating content in the Content Library
Type	Select **Video** to connect to a video hosting service
Active	Makes this content provider available for use in the Content Library

3. Click **Submit**.
   The system creates a new record for the content provider. You can view or edit it by navigating to **All** > **Content Publishing** > **Content Provider Configs** > **Content Providers**.

Add one or more content provider mappings to make videos available in specific content types.

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4. If you are already on the Content Providers page, click the Content Provider to add mappings. Otherwise, navigate to **All** > **Content Publishing** > **Content Provider Configs** > **Content Provider Mapping**.
5. Click **New**.
   Fill in the form fields:

Content provider mapping form

Field	Description
Content provider	Select the name of the Content provider you defined in the previous steps
Content type	Select a content type to use the video content. Choose from: ○ Rich content ○ News articles ○ Banner
Active	Makes this content provider available for use in the specific content type

6. Click **Submit**.

What to do next

- Enable employees to view private videos without providing credentials: Configure a video authorization
- To provide content managers with an interface where they can select a video, Configure video content search
- To add interface elements to the Content Library video picker, Configure content rendering parameter

Configure a video authorization

Configure a content processor to enable employees to view private videos without providing credentials.

Before you begin

- Role required: sn_cd.content_admin and fd_read_flows
- Create a subflow in Workflow Studio with the following inputs and outputs:

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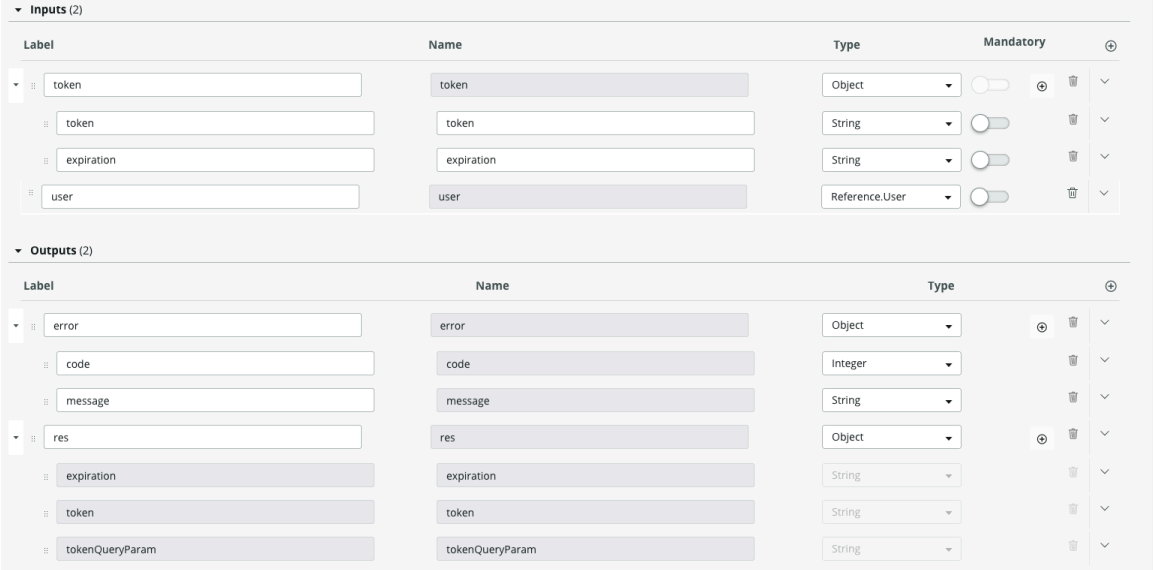

- Configure content provider and mapping

About this task

The authorize action makes authentication API calls to the video hosting service. The authorization method varies based on the provider and is determined by their supported embed iframe.

Content Publishing appends the authentication token as a query parameter along with its corresponding value to the embedded URL. The configured subflow inputs and outputs manage the query parameters and response body.

Note: The JSON Web Token (JWT) and access token authentication methods are proven to work. To use a different method, ensure you configure the subflow to return a token. The video hosting service must support auto-authentication via the token in the URL.

Procedure

1. If you have already opened a Content Provider, click the Content Provider Mapping **Preview record** icon then click **Open Record**.
   Navigate to **All** > **Content Publishing** > **Content Provider Configs** > **Content Processors**.
2. Click **New**.
   Fill in the form fields:

Content Processor form fields

Field	Description
Action	Select **Authorize**
Provider mapping	Select the Content provider that connects Content Publishing to the video hosting service
Processor subflow	Select the flow that performs the authorization API call
Active	Makes this action available to employees

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3. Click **Submit**.
   The new Content processor appears in the Content Provider related list.

What to do next

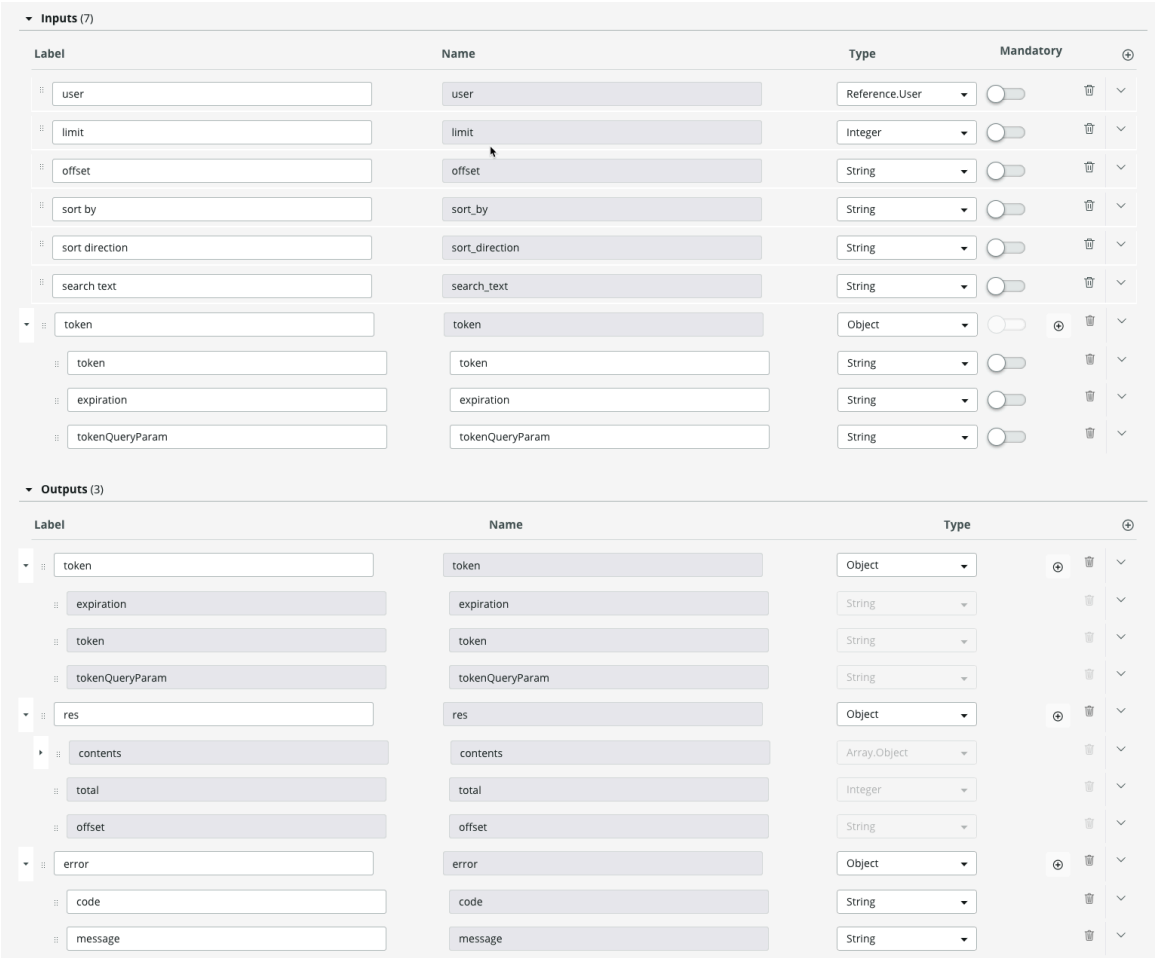
- Enable content managers to view thumbnails of available videos: Configure video content search
- Add interface elements to the Content Library video picker: Configure content rendering parameter

Configure video content search

Configure a content processor to add a button to the Content Library interface that enables a content manager to view thumbnails of available videos from the content provider.

Before you begin

- Role required: sn_cd.content_admin and fd_read_flows
- Create a subflow in Workflow Studio with the following inputs and outputs:



- Configure content provider and mapping

Procedure

1. If you have already opened a Content Provider, click the Content Provider Mapping **Preview record** icon then click **Open Record**.
   Navigate to **All** > **Content Publishing** > **Content Provider Configs** > **Content Processors**.

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2. Click **New**.
   Fill in the form fields:

New Content Processor form

Action	Select **Search**
Provider mapping	Select the Content provider that connects Content Publishing to the video hosting service
Processor subflow	Select the flow that performs the search API call
Active	Makes this action available to content managers

3. Click **Save**.
   The new Content processor appears in the Content Provider related list.

What to do next

- Enable employees to view private videos without providing credentials: Configure a video authorization
- Add interface elements to the Content Library video picker: Configure content rendering parameter

Configure content rendering parameter

A content rendering parameter functions similarly to video hosting URL parameters, allowing content managers to customize the viewer's experience through an interface element in the Rich Content Editor. Depending on the hosting provider, this can include defining a checkbox for enabling full screen or autoplay, or a textbox for specifying the start time.

Before you begin

- Role required: sn_cd.content_admin
- Complete the steps to Configure content provider and mapping

Procedure

1. If you have already opened a Content Provider, click the Content Provider Mapping **Preview record** icon, click **Open Record**, then open the **Content Rendering Parameters** related list. Navigate to **All** > **Content Publishing** > **Content Provider Configs** > **Content Rendering Parameters**.
2. Click **New**.
   Fill in the form fields:

Content rendering parameters form

Provider mapping	Select the Content provider that connects Content Publishing to the video hosting service

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Label	Appears in the Settings panel to identify the element for Content Managers (for example, autoplay or loop)
Type	Choose from: ○ Checkbox ○ Text
Render checked on UI? (Appears when you select checkbox)	Determines whether this check box is selected by default in the Rich Content Editor.
Append this query parameter to content URL	The query parameter that controls the element (for example autoplay or loopvideo)
Default Value	Sets the default value for the Content Library interface
Active	Makes this element available for use in the Content Library interface
Hide parameter	Hides this parameter from the Rich Content Editor interface, preventing it from being modified
Order	Where this element appears in relation to other custom elements, with the lowest value appearing higher on the screen

3. Click **Save**.

Content templates

Content templates empower content creators to efficiently publish large volumes of news articles. Each template defines the article layout, publishing schedule, destination, and target audience. By associating a news article with a content template, the system automatically generates publish plans, which reduces the effort required to publish content.

Your instance includes two out of the box templates with a set duration of 90 days and an audience of all active users.

- Featured News: Delivers news to widgets in the portal Home page, News Center, and mobile app.
- News Default: Delivers news to widgets in the portal Home page and News Center.

Note: If you insert a news widget onto a portal page that doesn't already have one configured out-of-the-box, you must create a new content destination to include that page in a content template.

To view a graphic that displays where the News widgets appear, see News articles.

To view the templates, navigate to **All** > **Content Publishing** > **Content Templates** > **View All**.

Note: Updating a content template does not impact existing publish plans that use that template.

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Creating a Content template

A user with the sn_cd.content_template_owner role creates a content template to define the article layout, publishing location, and audience. For more information, see Create a Content template.

Using Content templates

Content authors can use a content template when creating a News article. Depending on the template configurations, the template provides the following pre-defined components:

- Article layout
- Publishing destination (mobile or portal widget)
- Audience
- Content category
- Social engagement activities

When the content author clicks **Save** or **Save and continue**, the system auto-generates publish plans.

A Content template can be modified, even if it is associated with a News article. Changes to a Content template will not impact the existing publish plans for News articles.

Create a Content template

A content template is pre-defined publishing plan for news articles. Create a content template to enable content authors to create and publish higher volumes of news article content.

Before you begin

Role required: sn_cd.content_admin or sn_cd.content_template_owner

- The following content destinations are available out-of-the-box:
  - All News: the news feed widget on the News Center page
  - Featured News: the Featured News widget on the top of the News Center page
  - Featured News Mobile: the news section on the mobile app
  - Latest News Home Page: the news widget on the portal Home page
  - Other News: the news feed widget on the article detail page

  To publish to a different page and widget, create a custom content destination. See Add content destination.
- Define the audience. See Create an audience.
- Define content categories to tag the news articles, such as company news, pay and benefits, or industry news. See Create a content category.
- Define the article layout with a reusable article template. See Create a news article template.
- Enable and configure Content engagement features. See Content engagement.

About this task

The steps below guide you in creating a content template based on the form that appears when you navigate to **All** > **Content Publishing** > **Content Templates** > **Create New**.

If you instead navigate to **All** > **Content Publishing** > **Content Templates** > **View All** then click **New**, the form has the same fields but with different field names. Also, that form does not provide

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the ability to add a content destination, audience, or content categories to the template. Instead, you define a Content template record, then open the Content template to add the content destination, audience, or content categories.

Note: The Content template must have a defined content destination and audience to appear as an option in the Content Library **Publish** tab.

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Templates** > **Create New**.
2. Fill in the fields on the form.

New Content template form

Field	Description
Title	Title of the content template as you want it to appear in the news article creation form.
Description	Description for the content template.
Pre-load reusable article	Select the reusable article to set the content layout.
Default	Makes this content template the default publishing plan for future news content.
Duration	The period of time for which to make the news article available. **Note:** This duration setting only applies to content destinations that do not have a set duration.

If you do not see the form fields for content destinations, audiences, or categories, click **Submit**. You will be redirected to the All Content Templates list, where you can reopen the Content template to edit it. For each tab, click **Edit** to select the options.

3. Use the arrows to add one or more content destinations to the template.
4. Use the arrows to add one or more audiences to the template.
5. Use the arrows to add one or more categories to the template.
6. Select the **Reusable content item** to insert a news article layout.
7. Select which engagement activities to enable.
8. Click **Submit**.

Content Ownership

Define who has permission to create content, where they can publish it, and which employees can view it.

Content Ownership enables system admins and content admins to designate exclusive access to certain Content Publishing features to specific content managers.

Content Ownership gives control over three areas of Content Publishing:

- Who sees the content (Audience)
- Where can a content manager publish content (Topic or Page)

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- What content can the content manager create (Content item)

> **Note:** Content Managers can create audiences. To enable this, the Allow Ownership for Audiences option must be turned off. If the Ownership Property is enabled, the Content Manager will not have permission to create audiences. See, Create an auidence.

Examples by ownership area

Ownership area	Examples	Relevant links
Who - Audience Assign content managers the ability to publish content for specific employees	• Geographic audiences: target content to audiences based on their geographic location. For example, benefit information may be different for your employees located in the United States as opposed to other locations. • Type of employment: target content for employees that are contractors, new hires, or employees requiring visa transfers.	Assign ownership of an audience Create an audience
Where - Topic or Portal page Assign content managers to specific topics or pages	• Designated topics in the taxonomy • Designated pages in the portal • Pages containing rich content	Assign ownership to a portal page Assign ownership to a topic

What - Content item
 	
Assign content managers to specific content items
	• Sensitive content, such as:
	  ○ Mergers or acquisitions
	  ○ Reduction in Force (RIF)
	  ○ Content specific to geographic region
	  ○ Legal announcements
	• Rich content
	• News
		Assign ownership of content

Impact on roles

- System admin (admin) has total control and visibility into Content Publishing and Content Experiences during and after restriction set up.
- Content Administrators (sn_cd.content_admin) have full and complete access to add, edit, and publish content within the restricted areas and functions for Employee Center Pro.

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- Content Managers (sn_cd.content_manager) have restricted access to authoring and publishing capabilities. Review the tables below to understand how content managers access to audiences, pages, topic, and content items changes when a user or group is assigned to the record.

  The following graphic shows a content manager's access permissions to a record based in whether they are assigned to that record or not.

  Note: These access permission changes apply only when a record is assigned to at least one user or group. If a record does not have an assignment, it is accessible to all content managers.

  Access to records

  Audience Record

	Assigned	Unassigned
Schedule	✔	⊘
View	✔	✔
Add New	⊘	⊘
Edit	⊘	⊘
Delete	⊘	⊘

  Content Item Record

	Assigned	Unassigned
Schedule	✔	⊘
View	✔	⊘
Add New	✔	✔
Edit	✔	⊘
Delete	✔	⊘

  Topic Record

	Assigned	Unassigned
Schedule	✔	⊘
View	✔	✔
Add New	⊘	⊘
Edit	⊘	⊘
Delete	⊘	⊘

  Page Record

	Assigned	Unassigned
Schedule	✔	⊘
View	✔	✔
Add New	⊘	⊘
Edit	⊘	⊘
Delete	⊘	⊘

Activating Content Ownership

The following plug-ins are required:

- Employee Center Pro
- Content Publishing
- Content Governance (only required if using Content Governance features)
- Content Experiences (only required if using Content Experiences features)

Note: For more information on activating the above plug-ins, see Employee Center plugins and Install Employee Center Pro.

After activating the required plug-ins, enable the Content Manager Ownership properties. See Properties installed with Content Publishing. When the Content Manager Ownership properties are enabled, Content Ownership related lists appear in records for audiences, content items, topics, and portal pages.

Assign ownership of content

Assign a user or group with the content manager (sn_cd.content_manager) role to a content item so only that user or group can edit and publish the content.

Before you begin
Role required: sn_cd.content_admin

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Ensure **Yes** is checked under **Allow Ownership for Content Items** under Content Publishing or Content Experiences properties. For more information, see Properties installed with Content Experiences and Properties installed with Content Publishing.

About this task

Provide a content manager or group of managers with exclusive access to sensitive content, such as a notice of an upcoming merger or reduction of workforce.

Alternatively, use a content item as a template that can be repeatedly cloned and assigned to content owners for customization.

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Library** > **View All**.
2. Select a topic.
3. From the top-left menu (☰), select **View content record**.
   - To assign ownership to a user, select the **Restrict content by user** tab.
   - To assign ownership to a group, select the **Restrict content by group** tab.
4. Click **New**.
5. From the **User** or **Group** field, click the **Lookup using list** (🔍) icon and select a user or group.

   Note: Only groups that have the content admin (sn_cd.content_admin) or content manager (sn_cd.content_manager) roles appear. If the members of the group have these roles, but the group does not, the group does not appear.

6. Select **Submit**.
   After a user or group is associated with content, only that user or group can access the content when scheduling content or when adding content to a campaign. Removing the user or group makes the content accessible by all content managers.

Assign ownership of an audience

Provide ownership of an audience to a user or group with the content manager (sn_cd.content_manager) role so only they can access and schedule content for the audience.

Before you begin

Role required: sn_cd.content_admin

Ensure **Yes** is checked under **Allow Ownership for Audiences** under Content Publishing or Content Experiences properties. For more information, see Properties installed with Content Experiences and Properties installed with Content Publishing.

About this task

An audience is a defined group of employees that will receive targeted content. For information on creating an audience, see Create an audience.

You can restrict an audience to a specific content manager or group of content managers, which specifies which audience the content managers can publish for, and prevents other content managers from publishing content to that audience. For example, assign a regional Human Resources manager the sole ability to create content for employees based in that country.

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Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Audiences**.
2. Select an audience or create a new audience.
   - To assign ownership to a user, select the **Restrict audience by user** tab.
   - To assign ownership to a group, select the **Restrict audience by group** tab.
3. Click **New**.
4. From the **User** or **Group** field, click the **Lookup using list** (🔍) icon and select a user or group.

   Note: Only groups that have the content admin (sn_cd.content_admin) or content manager (sn_cd.content_manager) roles appear. If the members of the group have these roles, but the group does not, the group does not appear.

5. Select **Submit**.
   After a user or group is associated with an audience, only that user or group can access the audience. Remove the user or group to make the audience accessible to all content managers.

   Note: Content Managers can create audiences. To enable this, the Allow Ownership for Audiences option must be turned off. If the Ownership Property is enabled, the Content Manager will not have permission to create audiences. See, Create an auidence.

Assign ownership to a portal page

Assign ownership of a portal page to give a user or group with the content manager (sn_cd.content_manager) role exclusive content publishing ability for the Content Publishing widgets in that page.

Before you begin

Role required: sn_cd.content_admin

Ensure **Yes** is checked under **Allow Ownership for Portal Pages** under Content Publishing or Content Experiences properties. For more information, see Properties installed with Content Experiences and Properties installed with Content Publishing.

Procedure

1. Navigate to **All** > **Service Portal** > **Pages**.
2. Select the **ID** of the page.
3. Scroll down to the related list tabs.
   - To assign ownership to a user, select the **Content Publishing Owner by User** tab.
   - To assign ownership to a group, select the **Content Publishing Owner by Group** tab.
4. Click **New**.
5. From the **User** or **Group** field, click the **Lookup using list** (🔍) icon and select a user or group.

   Note: Only groups that have the content admin (sn_cd.content_admin) or content manager (sn_cd.content_manager) roles appear. If the members of the group have these roles, but the group does not, the group does not appear.

6. Select **Submit**.
   After a user or group is assigned to a page, only that user or group can publish content to that page. Remove the user or group to allow all content managers to publish content to that page.

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Assign ownership to a topic

Assign ownership of a taxonomy topic to give a user or group with the content manager (sn_cd.content_manager) role exclusive content publishing ability for the Content Publishing widgets in that topic.

Before you begin

Role required: sn_cd.content_admin

Ensure **Yes** is checked under **Allow Ownership for Topics** under Content Publishing or Content Experiences properties. For more information, see Properties installed with Content Experiences and Properties installed with Content Publishing.

About this task

The Unified Taxonomy is a collection of hierarchical topics that brings together different content types, such as requests, articles, quick links, learning content, and employee communications. For more information, see Unified Taxonomy for Employee Center.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Select a topic.
   - To assign ownership to a user, select the **Content Publishing Owner by user** tab.
   - To assign ownership to a group, select the **Content Publishing Owner by group** tab.
3. Click **New**.
4. From the **User** or **Group** field, click the **Lookup using list** (🔍) icon and select a user or group.

   Note: Only groups that have the content admin (sn_cd.content_admin) or content manager (sn_cd.content_manager) roles appear. If the members of the group have these roles, but the group does not, the group does not appear.

5. Select **Submit**.
   After a user or group is assigned to a topic, only that user or group can publish content to that topic. Removing the user or group allows all content managers to publish content to that topic.

Reusable components

Use Re-usable components to create content

Reusable components

Component	Description
Audiences	Define a list of users to see content based on conditions or criteria. Audiences
Block Content	Define reusable content. Add or modify block content
Content Destinations	Defines the page and widget for publishing news articles. Add content destination

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Reusable components (continued)

Component	Description
Content Categories	Defines categories to organize news articles. Create a content category
Link Content	Defines URL or video links for the Content Library. Add or modify links to other content sources
Reusable Articles	Lists news article reusable templates that were created by following the steps to Create a news article template. **Note:** This feature is only accessible to users with the sn_cd.content_template_owner role.

Add content destination

A content destination defines the page and widget for publishing news articles. It is a component of a content template, which auto-generates publish plans for new articles.

Before you begin

Role required: sn_cd.content_admin

About this task

The Employee Center Pro provides the following content destinations:

- All News: the news feed widget on the News Center page
- Featured News: the featured news widget on the top of the News Center page
- Featured News Mobile: the news section on the mobile app
- Latest News Home Page: the news widget on the portal Home page
- Other News: the news feed widget on the article detail page

To view a graphic of these content destinations, see the Publishing News articles section of News articles.

Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Content Destinations**.
2. Click **New**.
3. Fill in the following fields:

New Content Destination form

Fields	Description
Name	Name of the content destination. The name is what you select when you create a publish plan.

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Fields	Description
Content location	Specify whether to publish the content to the employee service portal or mobile app.
Page	The page in the employee portal where to publish the content.
Widget instance	The widget in the employee portal where to show the news article.
Active	Make the content destination available for use in publish plans.
Refine duration	The period of time for which to make the news article available. **Note:** Although content templates also have a duration field, the duration set in the content destination overrides the setting in the content template. This enables you to fine-tune the content duration based on its publishing location

4. Click **Submit**.

What to do next

After you finish creating a custom content destination, proceed to Create a Content template.

Audiences

Target portal content and lifecycle event activities to specified audiences with audience records.

Audiences configuration

For	Use case
Portal content	Defines the conditions or criteria that a user must meet to see content in the portal. See Scheduling the delivery of content for more information.
Org chart page and my team widget	Defines when new hires display on the org chart page and my team widget in the portal.
Lifecycle event activity	(Enterprise Onboarding and Transitions) Defines whether the activity should trigger for the lifecycle event case.

Scoped cache

You can add scoped cache for HR criteria to optionally save the evaluation results in cache. This is an optional feature that is available by passing a Boolean "true" as the "useCache" parameter.

You can also define how long in minutes to retain the cached entries via the sn_hr_core.cache.hrcriteria.ttl system property.

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Create an audience

Create or modify an audience record to define the conditions or criteria that users must meet to view content.

Before you begin

Role required: sn_cd.content_admin, sn_cd.content_manager

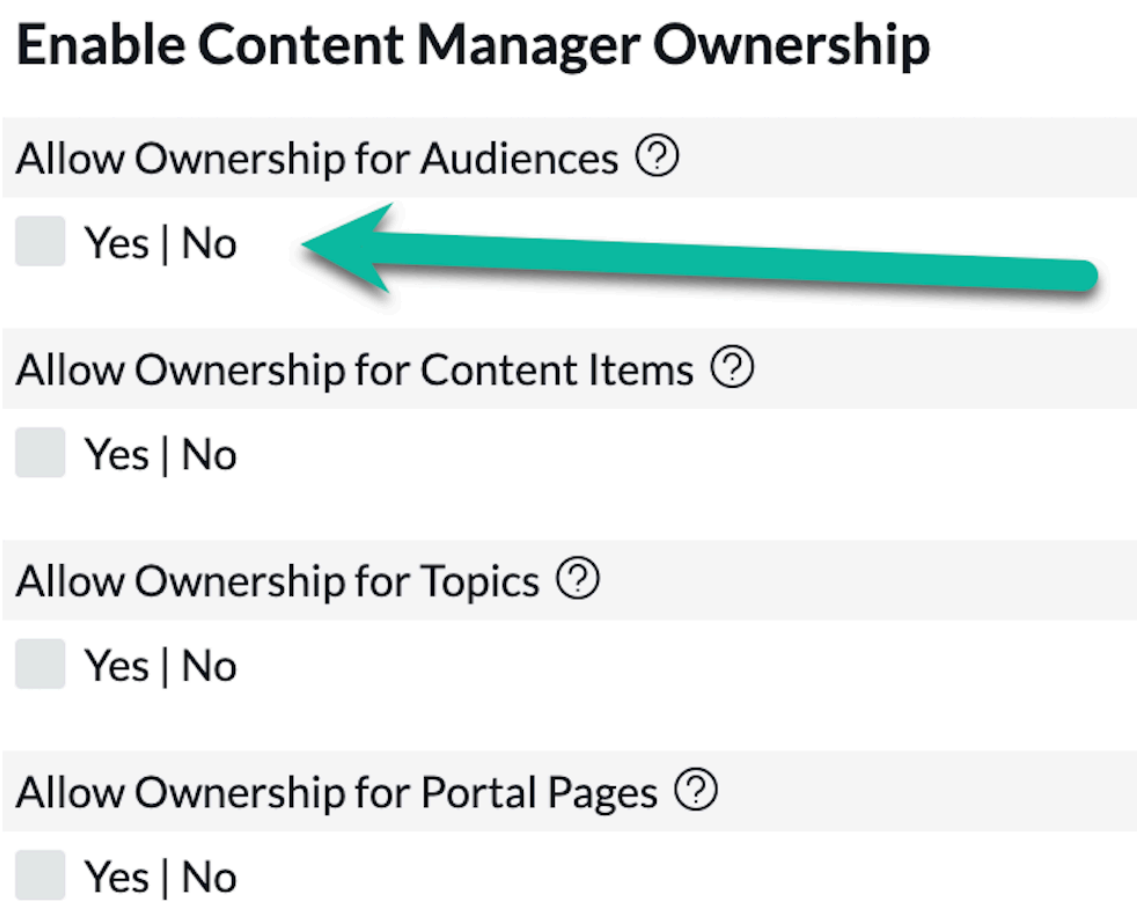
Each audience record is configured based on user conditions, user criteria, HR profile conditions, HR criteria, or an uploaded file. You can apply them to portal content or lifecycle event activities. For example, a lifecycle event activity for a work visa transfer is targeted only to employees that need a visa transfer.

Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Audiences**.
2. Click **New** or open a record.
3. Fill in the fields on the form.

> **Note:** Content Managers can create audiences. To enable this, the **Allow Ownership for Audiences** option must be turned off. If the **Ownership Property** is enabled, the Content Manager will not have permission to create audiences. Refer to the example below.

Content ownership settings



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Audience form

Field	Description	
Name	Name of the audience record.	
Audience type	The audience the content is directed to. Use one of the following selections to define an audience.	
	Users [sys_user]	Use conditions defined by the User [sys_user] table with custom conditions you choose. Use the **OR** button to define multiple conditions. Any of the conditions you define can be met when using **OR**. Use the **AND** button to evaluate all conditions you define. All conditions must be met when using **AND**. Select the **New Criteria** button to add conditions.
	User Criteria [user_criteria]	Criteria based on role, department, group, location, or company. User criteria is a platform feature. See User criteria for Service Portal.
	HR Profiles [sn_hr_core_profile]	(HR Service Delivery only) Use conditions based the HR profile [sn_hr_core_profile] table with conditions you choose.
	HR Criteria [sn_hr_core_criteria]	(HR Service Delivery only) Use pre-defined HR criteria. HR criteria is based on conditions defined by the HR Profile [sn_hr_core_profile] or User [sys_user] tables. The base system provides examples that can be used. **Note:** For more information, see HR criteria and Configure an HR criteria record.
	Upload File	Browse and choose a file with populated with user names or email addresses. ○ user_name template: Indicates that you are uploading a file with user names. ○ email template: Indicates that you are uploading a file with email addresses. **Note:** The header of the first column must contain user_name or email.

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Note: After audience type and conditions are selected, a blue link appears with the number of users that meet the criteria. Click this link to view all users by audience type.

Select the **View users** link to view the users that meet your conditions.

4. Click **Save**, **Submit**, or **Update**.

What to do next

If you click **Save** and the **Allow Ownership for Audiences** property is set to **Yes**, the **Restrict audience by user** and **Restrict audience by group** related lists appear.

Note: For more information on restricting an audience by user or group, see Content Ownership and Assign ownership of an audience.

Create a content category

Create a content category to tag news articles.

Before you begin

Role required: sn_cd.content_admin

About this task

Content categories organize news articles and make them easier to find. When you create a content category, the system creates a page in the News Center to display all the news articles tagged with that category. A news article can be tagged with one or more content categories.

Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Content Categories**.
2. Click **New**.
3. Fill in the following fields:

New content category form

Fields	Description
Name	Name of the content category. The name is what you select when you add the category to a Content template or News article.
Active	Make the content category available for use in Content templates or News articles.
Order	Where in the Category list widget this category appears in relation to other content categories, with the smaller value appearing higher on the list. If there are multiple categories with the same order value, the system lists them in alphabetical order.
Description	Optional description for the content category. This field is only visible to other content admins.

4. Click **Submit**.

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What to do next

After you finish creating a custom content category, proceed to Create a Content template or Create a news article.

Configure employee communications widgets

Modify the out-of-the-box widgets settings according to your organization's needs.

Widgets are containers that display dynamic content from ServiceNow® applications and plug-ins on the Employee Center portal. Employees can use widgets to view company announcements, complete to-dos, access SSO-integrated apps, or navigate to popular topics without leaving the portal. Portal admins can customize the widgets, rearranging their size and order and modifying their display.

Modify the Featured News widget

The Featured News widget displays featured articles on company news and announcements.

Before you begin

Role required: sp_admin or admin

Learn more about the news widgets: News articles

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Select **News Center**.
3. Press and hold the control key, right-select the Featured News widget, and then select **Instance Options**.
4. Configure the widget:

Widget configuration options

Widget option	Description
Load Async	Loads widget data in the background. If you select this option, the Employee Center homepage will appear even if the News widget hasn't finished loading.
Header	Text that appears at the top of the News Center page.
Show thumbnail	Option that displays a thumbnail image for each news article
Default thumbnail image	Select an image to display when a news article doesn't have a thumbnail image.
Show empty state	Option that allows the widget to appear if there are no news articles published to the Featured News widget.
Empty state message	The message to display when there are no news articles published to the Featured News widget.
Layout	How you want the news articles to appear in the widget. The choices are:

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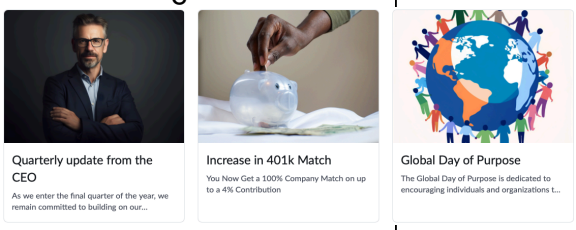
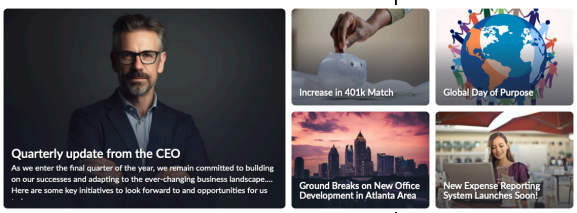
Widget option	Description
	○ **Card**: Displays a maximum of three articles where the thumbnail appears above the heading and subheading.  ○ **Tile**: Displays up to five news articles with one large tile and four small tiles where each tile has the news article thumbnail as the background. 
Fixed layout	Option to turn off pagination and display only the first page of news articles.
Performance Indicator	Enables viewing of nested call insights for total load time in parent and child news feed widgets, allowing users to add and review detailed nested calls for featured news and event widgets.

5. Select **Save**.

Modify the News feed widget

The News feed widget displays articles on company news and announcements. All news, Other news, and Related news are instances of the News feed widget.

Before you begin

Role required: sp_admin or admin

Learn more about the news widgets: News articles

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.
2. Press and hold the control key, right-select the News feed widget, and then select **Instance Options**.
3. Configure the widget:

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Note:

Admins have an additional configuration option to enable or disable a degraded or normal experience for the News Feed Widget to help during high traffic events.

News can be directed to other widget instances, provided that the content is published within the News Feed widget. The targeted news will automatically appear on the designated widget, eliminating the task of configuring any content assigned to that widget.

Widget configuration options

Widget option	Description
Load Async	Loads widget data in the background. If you select this option, the Employee Center homepage will appear even if the News widget hasn't finished loading.
Show title	Option to display the news article header title
Title	Title of the widget
Show thumbnail	Displays a thumbnail image for each news article
Show sub-headline	Option to display the news article sub-headline
Inline loading	The article reading page (cd_news_article) enables employees to open other news articles from the Article detail page without refreshing the entire page. **Note:** This is only intended to be used on the article reading page.
Enable grid/list controls	Displays an option for the user to switch between a grid and list view of news articles
Default view	Sets the default view for news articles:

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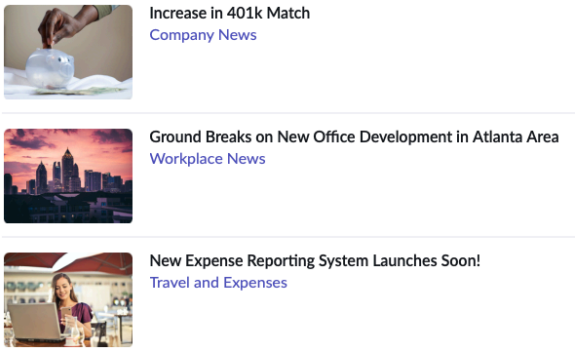
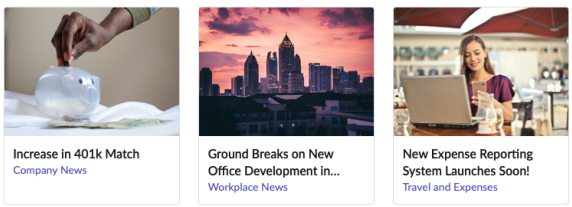
Widget option	Description
	○ **List**: Arranges articles in a vertical list.  ○ **Grid**: Arranges articles in a grid with a maximum three articles per row. 
Show categories	Option to show or hide the assigned categories
Pagination type	How users navigate through news articles. The choices are: ○ **Dotted**: Displays navigable dots representing each page of articles. ○ **Numbered**: Displays navigable page numbers. ○ **Call to action**: Displays a button with a call to action link. For example "View all news" which redirects users to the News Center page. ○ **Show more**: Displays a "Show more" button which reveals all the news articles when clicked.
Number of items per page	Maximum number of articles to display (system maximum is 500 articles)
Call to action: Text	Text for the call to action link. Select the **Call to action** layout to display this element.
Call to action: Page ID	The page where to redirect users who click on the call to action link
Default thumbnail image	Select an image to display when a news article doesn't have a thumbnail image
Empty state	Allows the widget to appear if there are no published news articles

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Widget option	Description
Degraded experience	Option to enable or disable a degraded or normal experience for the News Feed Widget to help during high traffic events.
Performance Indicator	Enables viewing of nested call insights for total load time in parent and child news feed widgets, allowing users to add and review detailed nested calls for featured news and event widgets.

4. Select **Save**.

Modify the Content Experiences widget

You can edit the banner of your Content Experiences widget to create a modern and unique layout for your content in the Content Experiences widget.

Before you begin

Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   The Employee Center home page is displayed.

   Note: **Custom HTML** options are not supported OOB on content experience widgets for **Banner content type**.

2. Press and hold the control key, right-click the Content Experience widget, and then select **Instance Options**.

   Note: On the topic page, selecting any heading—including quick link headings—allows you to access **Instance options**. Within the instance window, you can modify the current heading levels. Once changes are made, select **Save** to apply the changes; the updated heading level will be reflected on the topic page, enhancing overall visibility.

3. Configure the widget:

Widget configuration

Widget option	Description
Display heading text	Displays the Content Experience widget heading To configure the heading, navigate to **Service Portal** > **Pages** > **<Page Name>** > **Instance: Content Experience Header**
Display bounding box	Surrounds the widget with a shadow to give it a three-dimensional appearance
Display widget background color	If the content published to the widget is missing an image, the widget displays the set

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Widget option	Description
	background color instead of the portal page background color.
Widget style	How you want the content to appear in the widget when viewed on desktop. The choices are: ○ **Right-hand list menu**: Displays a menu of content headings on the right side of the widget. ○ **Dotted carousel**: Displays navigable dots representing each page of articles. ○ **Tiles**: Displays content in one large left-side tile and two smaller vertically-stacked tiles on the right side.
Allow background image to be partially covered by right-hand list menu	Stretches the image across the width of the widget. This option only applies to the widget style right-hand list menu setting.
Alt Text	Content manager can add an Alt Text field, which provides a short description of the featured images. This capability is only available within the Content Experiences Widget for styles, banner or news and event content. **Note:** This feature lets users hear image descriptions on the portal using a screen reader.
Widget height	Sets the widget height
Show 3 small tiles	When the tiles widget style is selected and widget height is 600 pixels or more, this options displays content in three small vertically-stacked tiles on the right side
Load configuration	Sets how the order in which the page and widgets data loads. Choose from: ○ **Asynchronous**: First the page loads, then the widgets data loads. Users see content appear in the widgets as soon as each individual widget loads. ○ **Synchronous**: Page and widget data loads at the same time. The page remains blank until all the data loads.

4. Click **Save**.

Modify banner width options

Modify the width of the Employee Center Pro banner widget, on the home page, to suit your preference.

Before you begin

Role required: admin

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About this task

Configure the width of the Employee Center Pro banner widget, in one of the following sizes:

- Fixed width view
- Fluid width view

Note: **Custom HTML** options are not supported OOB on content experience widgets for **Banner content type**. The banner width configurable options are only available if you have Employee Center Pro version 25.0.3. The older versions only have the Fluid option available.

Procedure

1. Navigate to **All** > **Service Portal** > **Pages** > **ec_pro_dashbaord**.
2. Scroll down to the **Page Content** and select the **Employee Center Pro Homepage - Container 1**.
3. Make the page editable.
4. **Optional:** To keep the banner compressed, change the **Width** to **Fixed** and select **Update**.

Fixed width view



5. **Optional:** To expand the banner to fit the screen, change the **Width** to **Fluid** and select **Update**.

Fluid width view



Result

Set the banner widget on the Employee Center Pro home page to your preferred width.

Configure Localization Framework for Content Publishing

Configure the translation workflow to enable Content managers to request translation via the Localization Framework. The basic workflow relies on manual translation; you can integrate with a third-party service to receive automatic translation.

Before you begin

Role required: Admin

- Activate Localization Framework
- Activate a language

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- (Optional) Configure a translation mode, such as machine translations, send to a translation management system, send via email, or export/import: Translation modes.
- Create a user group to perform translation:
  - Create a user group
  - Assign the `localization_fulfiller` role to the group: Assign a role to a group
  - Add users to perform translation: Add a user to a group
- Activate the `sn_cd.enable_localization_framework_integration` system property: Properties installed with Content Publishing

Procedure

1. Navigate to **All** > **Localization Framework** > **Settings**.
2. Click **New**.
3. Enter a name for the setting.
4. Select **All** from the **Artifact** list.
5. Select the languages into which you want the content translated.
6. Select the **Workflow Preferences** tab.
7. Select **Translation -> Publish** from the Workflow list.
8. From the **Localization fulfiller group** menu, insert the group you created.
9. Click **Submit**.

Result

The Content Library displays the **Translate content** button, enabling Content managers to request translation in the languages you have enabled.

To learn more about translation in the Content Library, see Multilingual support in the Content Library

Configuring translation for Content Publishing after upgrade

Content Publishing supports multi-lingual content creation by enabling content managers to easily change the interface language and request content translation through the Localization Framework.

For more information on multiple language support in the Content Library, see Multilingual support in the Content Library.

For information on translating custom widgets, see Translate a client script message

- Translation is available through Content Publishing versions 21.0.15 and later.
- When upgrading your version of Content Publishing, you will not automatically receive translations support for all fields. The following tables are not updated to use translated text instead of the original type field:
  - Portal Content (sn_cd_content_portal)
  - Block Content (sn_cd_block)
  - To-Do Content (sn_cd_content_todo)
  - News Content (sn_cd_content_article)
  - Notification Content (contains emails) (sn_cd_content_notification)

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Admins can manually enable the changes to the tables to use translations. Go into the table definitions (sys_db_object) for each table and change the field types to Translated Text or Translated HTML.

> ⚠ **Warning:** Before you change the field types for a table, ensure you perform a back up your data into another column or by exporting the data first. This is a safe guard against losing any data.

The tables and fields that require changing are:

Tables to manually enable translations

Table	Field	Original type	New type
Portal Content (sn_cd_content_portal)	button_text	String	Translated Text
Portal Content (sn_cd_content_portal)	link_text	String	Translated Text
Portal Content (sn_cd_content_portal)	rich_text	HTML Script	Translated HTML
Rich Content HTML (sn_cd_content_portal)	headline	HTML	Translated HTML
Rich Content HTML (sn_cd_content_portal)	heading_text	String	Translated Text
Block Content (sn_cd_block)	rich_text	HTML	Translated HTML
Block Content (sn_cd_block)	rich_text_user_specific	HTML Script	Translated HTML
To-do Content (sn_cd_content_todo)	button_text	String	Translated Text
News Content (sn_cd_content_article)	headline	String	Translated Text
News Content (sn_cd_content_article)	rich_content_html	HTML	Translated HTML
News Content (sn_cd_content_article)	title	String	Translated Text
Notification Content (sn_cd_content_notification)	rich_text_plain_html	HTML	Translated HTML
Notification Content (sn_cd_content_notification)	subject	String	Translated Text
Notification Content (sn_cd_content_notification)	description	String	Translated Text

Add or modify content type for Content Publishing

Use **Content Types** to associate the content type category with a service portal widget to determine where content resides on your service portal.

Before you begin

Roles required: sn_cd.content_admin

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The base system provides content types and content that you can use.

Procedure

1. Navigate to **All** > **Content Publishing** > **Advanced** > **Content Types**.
2. Click **New** or an existing content type to edit.

Field	Description
Name	Unique name that describes the content.
Category	The content type category. The types are: ○ Portal Content ○ Notification Content ○ Community Content ○ To-do Content ○ Mobile Content See Portal content.
Associated widgets	Widgets that can show the type of content you are defining or editing.
Active	Indicates that the content type is active and available to use.
Value	Unique identification of the content type.

3. Click **Submit** or **Update**.

Setup continuous improvement

Enhance efficiency and performance through feedback and analytics.

Continuous improvement features

Feature	Description
Content Analytics	Monitor and measure the impact of your content using Content Analytics.
Integrated experience and service feedback	Experience and service feedback enables you to gather quick feedback from your users on their user experiences and their service experiences.

Integrated experience and service feedback

Experience and service feedback enables you to gather quick feedback from your users on their user experiences and their service experiences.

Configure the experience and service feedback across the Employee Center portal to gain insights into your user sentiments, as an admin.

View all the responses captured neatly in the Feedback Analytics dashboard.

The two feedback types are:

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- Experience feedback: Provide your feedback on the user experience in the portal, the mobile, Kiosk, or through the Virtual Agent.
- Service feedback: Provide your feedback on the service experience like raising a Service Catalog item request.

Both the feedback types can be either static questions or survey questionnaires.

Note:

- Configure the experience feedback drawer widget in your portal, if it has the Employee Center header.
- Configure the experience feedback drawer widget to provide feedback in various formats like, experience, numeric value feedback, or star rating feedback. For more information on configuring feedback definition, see Set up the feedback definition.
- Avail the star rating and the numeric value rating in Experience feedback predefined with Employee Center version 35.0.
- For a description of the field values in the feedback definition form, see Feedback definition form.

Provide feedback through the drawer widget, In page in the portal or via email.

The following widgets are customizable. For more information on how to customize the widgets, see Integrated service and experience feedback management.

Feedback widgets

Name	Type	Description
experience-flow-feedback	Widget	Supports in-page feedback on the portal.
experience-workflow-feedback	Widget	Supports workflow-based feedback on the portal.

Post-feedback loop

Post-feedback loop allows tasks to be created when the feedback rating is beneath or equal to the rating threshold. The feedback tasks are visible in **My tasks**.

Note: The sn_hr_sp.esc_admin has read and write access to the feedback task table Employee Center Pro version 37 onwards. Additionally, the following fields in the feedback task form are read-only, version 37 onwards:

- **Feedback definition**
- **Assessment response**
- **Feedback provided by**

View the **Details** tab to get the feedback task assessment. For Survey feedback tasks, view the responses and assessment details.

Feedback tasks can be anonymous if the feedback provider doesn't share their personal information while submitting the feedback. Notify the feedback provider via email when the task is resolved if they have shared their personal details. For more information, see

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- Resolve a feedback task
- Feedback task notification

Experience feedback for browser extension

Get an experience feedback configuration and a feedback definition when you install Browser Extension for Employee Center plugin (sn_ex_brw_ext) version 1.0 along with Employee Center Pro plugin (sn_ex_sp_pro) version 36.0.

Note: **Experience Feedback for Browser Extension** definition has certain differentiators from the generic experience feedback options. For more information, see Set up the feedback definition.

You can view the feedback analytics from the browser extension by selecting the **Employee Center Browser Extension** in the **Portals Filter**.

Set up the feedback configuration

Set up the feedback configuration for the experience and service feedback in the Employee Center portal. Configure a seamless channel of feedback communication that remains constant for your portal.

Before you begin

Role required: sn_hr_sp.esc_admin

About this task

Set up the integrated service and experience feedback that is available with Employee Center Pro. Get responses anywhere in your portal, via email or Virtual Agent, or through the Kiosk.

The feedback configuration is generic for all feedback types and definitions.

Procedure

1. Navigate to **All** > **Employee Center** > **Experience and Service Feedback** > **Feedback Configuration**.
2. Select **New** to create a feedback configuration.
3. On the feedback configuration form, fill in the fields.
   For a description of the field values, see Feedback configuration form.
4. Select **Submit**.

Note: The following default feedback configurations are available with Employee Center Pro version 32.0.

- **Employee center feedback configuration**
- **Feedback configuration for kiosk portal**
- **MESP Feedback Configuration**

If you have the Browser Extension for Employee Center plugin (sn_ex_brw_ext) version 1.0 along with the Employee Center Pro plugin (sn_ex_sp_pro) version 36.0, you have **Browser Extension feedback configuration** by default.

Result

You've configured the properties for the integrated service and experience feedback.

What to do next

Set up the feedback definition. For more information, see Set up the feedback definition.

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Set up the feedback definition

Configure the feedback definition to curate the finer details of each feedback type.

Before you begin

Role required: sn_hr_sp.esc_admin

About this task

Feedback definition provides you with the liberty to select how and at what point and mode do you want to gather your feedback data from your users. You can:

- Select the questions to ask.
- Select the kind of question, whether static or survey.
- Select the mode of the feedback request, whether it's a drawer widget or In page, and so on.

Procedure

1. Navigate to **All** > **Employee Center** > **Experience and Service Feedback** > **Feedback Definitions**.
2. Select **New** to create a feedback definition for a portal page.
3. On the feedback definition form, fill in the fields.
   For a description of the field values, see Feedback definition form.
4. Save your modifications.
   - To save your changes and stay on the form, select **Save**.
   - To save your changes and return to the Feedback Definitions [sn_ex_sp_pro_feedback_definition] table, select **Submit**.
   - **Note:** The following feedback definitions are active on installation of Employee Center Pro version 32.0.
     - **Experience feedback**
     - **Experience feedback for Kiosk**
     - **Experience feedback for Virtual Agent**
     - **Experience feedback for mobile**
   - You only see **Experience feedback for Kiosk** when you have the Employee Center Pro Kiosk plugin (sn_ex_sp_pro_kiosk) installed.
   - The following feedback definitions are active on installation of Employee Center Pro plugin (sn_ex_sp_pro) version 35.0.
     - **Star rating for experience**
     - **Experience feedback for Kiosk**
     - **Experience feedback for Virtual Agent**
     - **Experience feedback for mobile**
   - If you're originally deploying the experience feedback functionality or the Employee Center Pro plugin (sn_ex_sp_pro) itself with version 35.0, the **Star rating for experience** definition is active by default. The **Experience feedback** definition is inactive.
   - If you're an existing user of the **Experience feedback** definition, the **Star rating for experience** definition is inactive by default. You can enable the former in Employee Center Pro plugin (sn_ex_sp_pro) version 35.0.

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- If you have the Browser Extension for Employee Center plugin (sn_ex_brw_ext) version 1.0 along with the Employee Center Pro plugin (sn_ex_sp_pro) version 36.0, you have **Experience Feedback for Browser Extension** definition by default. The following are some key differentiators from the generic experience feedback definitions.
  - The **Star - 5 point scale** is active with the feedback definition by default. You can change it to any other form of experience feedback according to your organizational requirement.
  - The **Page selection** only has **ecbe_pro_home** option for the **Included pages** field.
  - The **Widget mode** field has **Inline** option for the experience feedback for the browser extension. For more information on the field values, see Feedback definition form.

5. Trigger Conditions [asmt_condition] table is visible only for the feedback type Service - workflow once the definition is saved.
6. Select **New**.
7. On the trigger condition form, fill in the fields.
   For the description of the field values, see Trigger Condition form for surveys.

Note:

- Access the experience feedback widget in the topic pages, the Service Catalog items, and in the My Requests page available by default.
- Add the widget manually in any other page.
- Create only one feedback definition for a portal at a time.
- Create unique survey feedback for each feedback definition.
- Change the default reset timer of the feedback definition trigger condition from 30 days to your required period.

What to do next

- Use the feedback widgets across the Employee Center portal. For more information, see Use the integrated experience and service feedback.
- Check the responses received on the experience feedback dashboard. For more information, see Feedback Analytics dashboard.
- Customize the appearances of the experience flow and the workflow feedback widgets. For more information, see Integrated service and experience feedback management.

Configuring feedback for Virtual Agent

You can promote the experience feedback or set up service feedback for the Virtual Agent.

Promote experience feedback in Virtual Agent

Promote the experience feedback topic to appear in the default Virtual Agent suggestions.

Before you begin

You must have a feedback definition for the Virtual Agent channel with the **Feedback type** set to Experience.

Role required: admin

Procedure

1. Navigate to **All** > **Employee Center** > **Experience and Service Feedback** > **Feedback Definitions**
2. Select the feedback definition that you created for the Virtual Agent channel.

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3. Select the **Promote Experience feedback in VA** related link.
   The experience feedback is promoted in the Virtual Agent.
4. **Optional:** View the promoted topic record by selecting the link in the displayed message.
   For more information about promoted topics, see Promote or demote LLM conversational subflows, actions, and topics in Assistant Designer.

Set up service feedback for Virtual Agent

Set up the service feedback to appear after a topic conversation in the Virtual Agent.

Before you begin

You must have a feedback definition for the Virtual Agent channel with the **Feedback type** set to Service - workflow.

Role required: admin

Procedure

1. Navigate to **All** > **Employee Center** > **Experience and Service Feedback** > **Feedback Definitions**
2. Select the feedback definition that you created for the Virtual Agent channel.
3. Select the **Setup Service feedback in VA** related link.
4. View the setup topic record by selecting the link in the displayed message.
   For more information about setup topics, see Working with setup topics.

> **Note:** You can set the value of the `com.glide.cs.survey.probability` system property to change the probability (percentage) that the survey setup topic occurs in your conversations. For example, set the Value to 0.50 to display the survey setup topic randomly in 50% of conversations.

Result

The service feedback is set up for the Virtual Agent.

Integrated service and experience feedback management

Manage the experience and service feedback widgets according to your organizational need.

Modify the experience flow feedback widget

Customize the appearance of the experience flow feedback widget with the instance options.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > **Employee Center**.
2. From the Mega Menu, select a topic page.
3. Press the control button and simultaneously select and hold (or right-click) to get the menu options.
4. Select **Instance Options** and modify the following options.

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Feedback widget instance options

Instance options	Description
Data	**Record ID param**: Page record ID to receive feedback.
Data	**Table**: Record table ID chosen for the feedback. **Note:** The record table is primarily used for the **Service - workflow** feedback type.
Presentation	**Title**: Title of the In page feedback widget you want to display.
Presentation	**Alignment**: Alignment preference for the display text.

5. Select **Save**.

Result
The In page feedback widget is customized according to your preference.

Modify the workflow feedback widget

Customize the appearance of the workflow feedback widget with the instance options.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure
1. Navigate to **All** > **Employee Center**.
2. In any record details page, press the control button and simultaneously select and hold (or right-click) to get the menu options.
3. Select **Instance Options** and customize the appearance of the widget.
4. On the feedback widget instance options window, fill in the fields.
   For a description of the field values, see Modify the experience flow feedback widget.

Result
The workflow feedback widget is customized according to your preference.

Feedback Analytics dashboard

Track all your feedback responses with the Feedback Analytics for portals, email, Virtual Agent, kiosks, and Now Mobile®.

The Feedback Analytics, previously called the Experience feedback dashboard, helps you track all the feedback responses gathered from your users, in one place.

Feedback Analytics dashboard supports the Next Experience theme.

The following roles are required to access or view the dashboard:

Feedback Analytics dashboard roles

Role	Description
assessment_admin	This role has access to the assessment components.

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Feedback Analytics dashboard roles (continued)

Role	Description
esc_admin	This role is the Employee Service Center admin.
survey_reader	This role can view the contents of the dashboard.

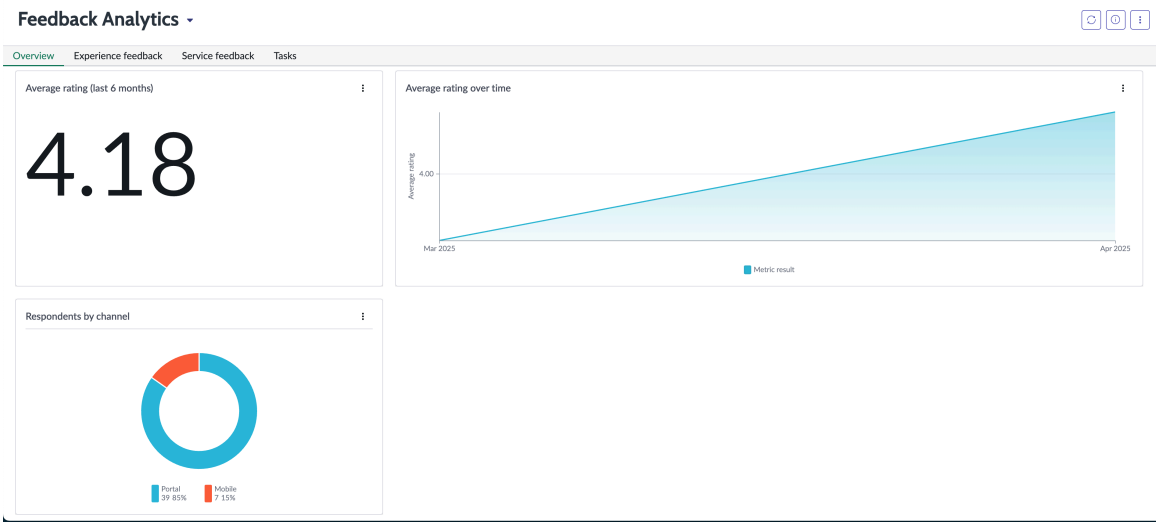
Note: Feedback Analytics is a read-only dashboard. You must clone the Feedback Analytics dashboard to customize it.

Clear the **Portal** filter option, if you want to view the trend of responses, regardless of their channels.

You can see the following trends on the dashboard.

Feedback Analytics Overview

Feedback analytics - Overview



Average rating (last 6 months): Shows the average rating gathered in the last six months.

Average rating over time: Shows the average rating gathered for a period.

Respondents by channel: Shows the number of responses received based on the type of channel used to get it. For example portal, mobile, email, kiosks, or Virtual Agent feedback.

Average rating for service feedback definitions: Shows the average rating for each feedback definition created. For example, the average rating for topic pages residing in different taxonomies or the average rating for workflows.

Service feedback - top pages by responses: Shows the top choices in the pages where feedback is received on the portal.

Experience feedback responses: Shows the number of responses received through the drawer widget or on the modal in the portal.

Experience feedback - top pages by responses: Shows the top choices in pages where experience feedback is used.

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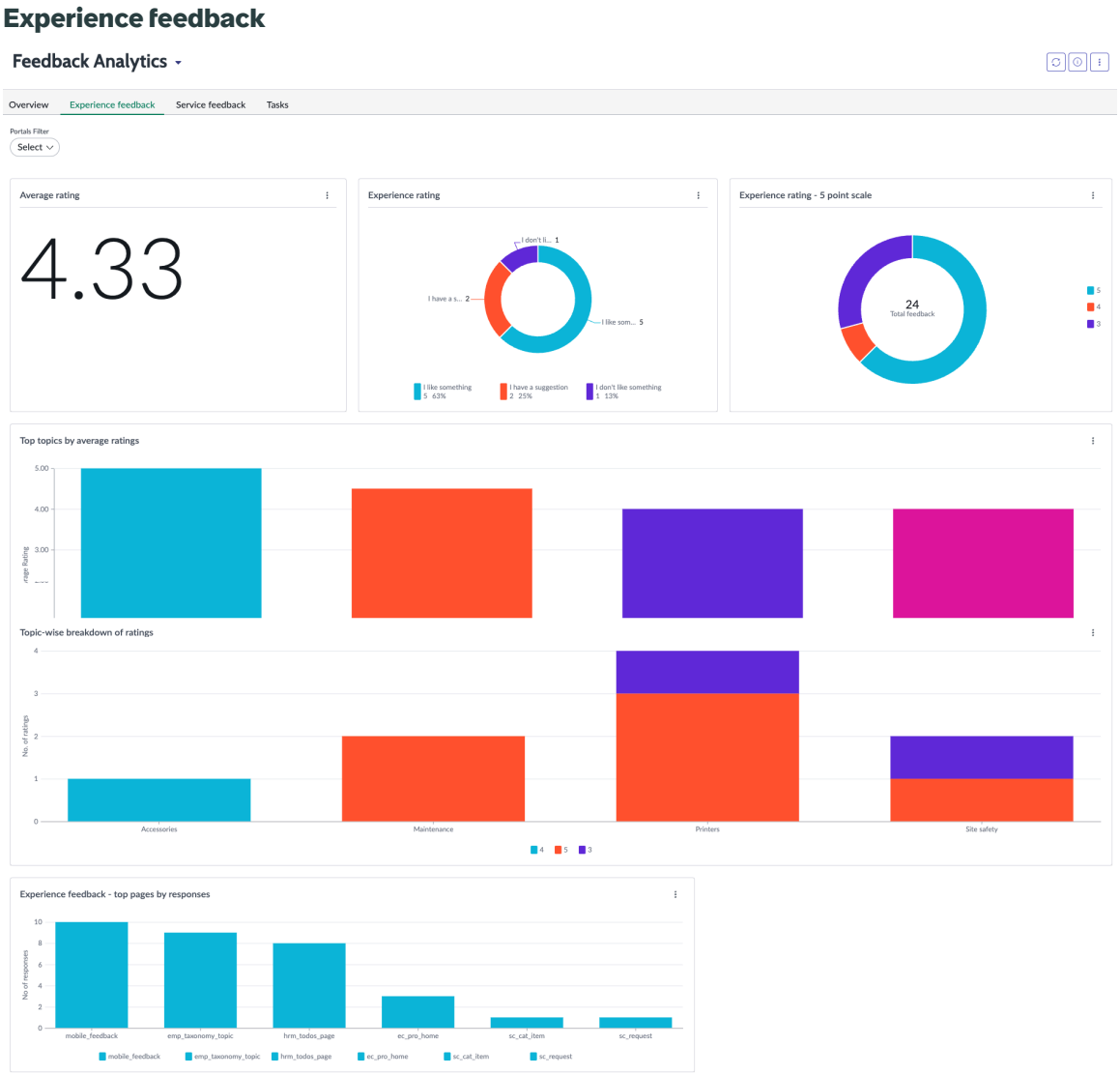
Experience feedback



Average rating: The average of the ratings received for Experience feedback.

Experience rating: Basic experience feedback rating data received presented by percentage.

Experience rating - 5 point scale: Number and type of ratings received in both 5 point scale and 5 point numeric rating scale.

Top topics by average ratings: Top topics according to the rating received in descending order.

Topic-wise breakdown of ratings: Topic-wise breakdown of the point-scale rating received.

Experience feedback - top pages by responses: Top pages with the most experience feedback ratings.

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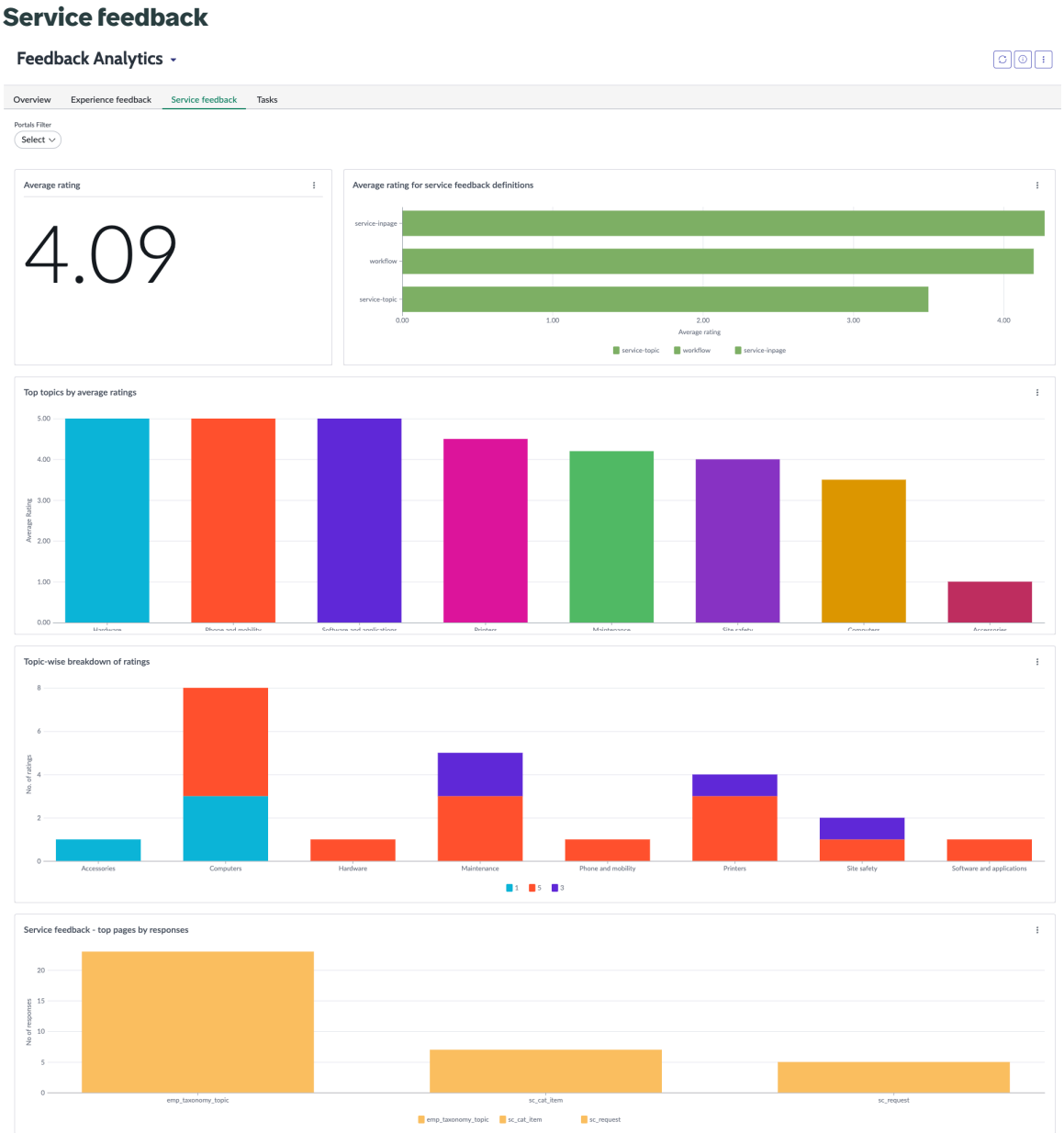
Service feedback



Average rating: Average of the ratings received for Service feedback.

Average rating for service feedback definition: Average of the ratings received by Service feedback definition types.

Top topics by average ratings: Top topics according to the rating received in descending order.

Topic-wise breakdown of ratings: Topic-wise breakdown of the point-scale rating received.

Service feedback - top pages by responses: Top pages with the most service feedback ratings.

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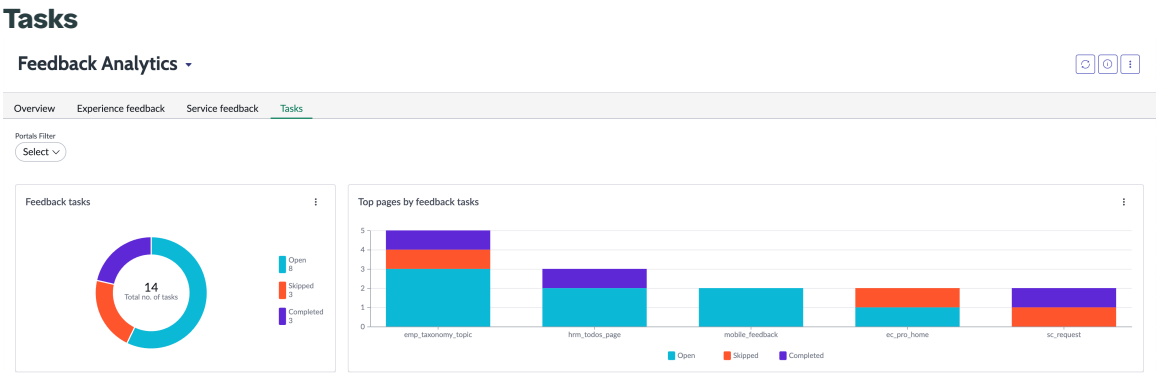
Tasks



Feedback tasks: Number of tasks displayed by their respective states.

Top pages by feedback tasks: Top pages where feedback is shared and the number of tasks displayed by their respective states.

Usage Insights dashboard

The Usage Insights dashboard helps get a consolidated view of the feedback data. It provides a quick view of all types of feedback data in the Usage Insights dashboard.

The Usage Insights dashboard shows feedback data gathered from different users at a glance. It provides data from the experience, service, and survey feedback.

If you're already familiar with the Usage Insights dashboard, track all your feedback data from different portals here.

The following are the different components of the experience and service feedback visible in the Usage Insights dashboard.

Experience feedback

See the following usage insight for the experience feedback data.

- **Page Id**: Page ID where the feedback is provided.
- **Rating**: Rating grouped to understand the percentages of positive or negative feedback.
- **Users**: User ID of the feedback provider.

  If the feedback provider chose to be anonymous, the user ID is displayed as Guest.

- **Comment**: Percentage projection of the user sentiments collected through the ratings.

> **Note:** The comment insight is only available for the Employee Center portal not for the Employee Center Pro Kiosk and the Mobile Employee Service Portal.

Experience feedback 5-point scale

See the following analytics insight for the experience feedback 5-point scale.

- **Comment**: Percentage projection of the user sentiments collected through the ratings.
- **Page Id**: Page ID where the feedback is provided.
- **Rating**: Rating grouped to understand the percentages of positive or negative feedback.

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- **Users**: User ID of the feedback provider.

  If the feedback provider chose to be anonymous, the user ID is displayed as Guest.

Service feedback

See the following analytics for the service feedback data.

- **Page Id**: Page ID where the feedback is provided.
- **Record Id**: A workflow tracking system where it shows whether the feedback is from a portal or an email.
- **Rating**: Rating grouped to understand the percentages of positive or negative feedback.
- **Users**: User ID of the feedback provider.

  If the feedback provider chose to be anonymous, the user ID is displayed as Guest.

- **Topic Name**: Topic page where the feedback is provided.
- **Comment**: Percentage projection of the user sentiments collected through the ratings.

Survey feedback

See the following analytics for the survey feedback data.

- **Page Id**: Page ID where the feedback is provided.
- **Survey Name**: Name of the survey.
- **User Id**: User ID of the feedback provider.

  If the feedback provider chose to be anonymous, the user ID is displayed as Guest.

Content Analytics

Monitor and measure the impact of the content you provide through the Employee Center and in campaigns using Content Analytics.

Content Analytics collects data and generates visualizations on employee engagement with content in the Employee Center. Content Analytics is powered by the Platform Analytics framework.

Note: Google Analytics is no longer supported as Google has stopped offering the integration.

Content Analytics dashboards

Dashboards display data visualizations in widgets. Each widget displays data for specific parameters, such as user interactions with content. Content Analytics includes the following dashboards:

Content Analytics dashboards

Dashboard	Description of data visualizations
Content Analytics	Portal engagement metrics, including unique users, average time per page, and bounce rate.

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Content Analytics dashboards (continued)

Dashboard	Description of data visualizations
Content Analytics - Basics	Portal page visits and views, including visits per day and most-frequently viewed pages.
Campaign Analytics	Campaign engagement metrics, to-dos, and impact, filtered by campaign or campaign success goal.
Campaign Overview	Campaign performance metrics by campaign, including tasks closed and user actions.
Content Library Overview dashboard	Performance metrics for content published to the portal or Now mobile app.
Content engagement	Metrics on user engagement, such as content views, reaction icon clicks, comments, and replies to comments.

Setting up Content Analytics

1. Activate Content Analytics
2. Establish the tracking profile, by performing one of the following steps:
   - Activate one of the out-of-the-box tracking profiles and set it as the default tracking profile: Activate a tracking profile
   - Create a custom tracking profile: Create a Content Analytics tracking profile

   For more information on tracking profiles, see the section below.
3. To track analytics for a custom widget or page, you must add the tracking profile to the header: Set up Content Analytics tracking

> **Important:** A new **Enable Tracking** field has been introduced to content notifications, designed specifically for email content. Existing notification records will have this field disabled by default, in line with prior system settings and by default, existing email content will have tracking turned off. However, for new email notification contents, the **Enable Tracking** option will be available for your selection and will be automatically enabled on new record creation. This feature provides greater flexibility, allowing you to determine whether tracking should be applied to specific email content record.

Tracking profiles

Tracking profiles define a bucket where you want to capture analytics. It can correspond to a portal, campaign, application, or any context you like.

Two tracking profiles are included out-of-the-box: Content Experiences and Content Publishing. You can use either one to collect data on content that is displayed with an out-of-the-box widget. If your portal is publishing content to custom widgets, you must update an out-of-the-box tracking profile to collect data for those widgets or create a new tracking profile.

Data collection and storage

Content Analytics stores collected data in tables, which are organized by data type.

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Note: If a dashboard does not display visualizations, check that the data is being collected by opening a table. Enter the table name in the navigation bar, appended by `.list`.

For a list of Content Analytics tables, see Components installed with Content Analytics.

This is an overview of the process by which Content Analytics collects and moves data:

1. The users performs an action, such as opening a page or clicking a link.
2. Content Analytics collects that data point and stores in the browser memory.
3. After a user navigates to other content or after five minutes, the data moves to the server in memory.
4. The data moves to the content analytics tables.
   - Tracked Event [sn_cda_tracked_evt_agg]
   - Tracked Page [sn_cda_tracked_page_agg]
   - Tracked Visit [sn_cda_tracked_visit_agg]
5. The tracking profiles trigger runs to transfer data to the shared analytics tables.
   - Event Statistic [sn_cda_event_stat]
   - Page Statistic [sn_cda_page_stat]
   - Analytics Visit Statistic [sn_cda_analytics_visit_stat]

Activate Content Analytics

Activate Content Analytics if you have an admin role to use the default analytics solution that provides web portal traffic analytics, as well as Content Experiences (aka Campaigns) related engagement statistics.

Before you begin

Role required: admin

About this task

Content Analytics requires the following plugins to collect data and generate dashboards:

Content Analytics plugins

Plugin	Description
Content Analytics [sn_cda]	Collects data and provides basic metrics on page views and user sessions
Content Publishing [sn_cd]	Provides data from content published through Content Publishing
Content Experiences [sn_ca]	Provides data from content published through Content Experiences
Performance Analytics - Portal Analytics [sn_cdap]	Enhances dashboards with content profiling and time window filters
Performance Analytics - Content engagement Analytics [sn_ca_pa]	Enhances dashboards with campaign filters enabling users to view campaign-specific analytics and engagement over time for to-do content

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select a version from the list and select **Install**.

   In the Install dialog that is displayed, any dependencies that are installed along with your application are listed.
4. If you are prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.
6. Select **Install**.

What to do next
Content Analytics

Related topics

Components installed with Content Analytics

Activate a tracking profile

Activate one of the out-of-the-box tracking profiles to start collecting portal and campaign metrics.

Before you begin
Role required: sn_cda.analytics_admin

About this task
Content Analytics contains two out-of-the-box profiles (Content Experiences and Content Publishing) that track metrics for the demo portal associated with the product.

You can use either tracking profile to track metrics for the Employee Center by setting it as the default profile.

Procedure

1. Navigate to **All** > **Content Analytics** > **Setup**.
2. Activate one of the profiles: Double-click in the **Active** column, select **True**, then click the **Save** icon.

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3. Set a default profile: Double-click in the **Default** column, select **True**, then click the **Save** icon.

> **Note:** The two profiles act as repositories for data collection. The different repository of data provides options to display data sets separately in the analytics dashboard.

Result

The out-of-the-box tracking profiles each have a scheduled job to collect data. You can modify or manually execute the script associated with the scheduled job by doing these steps:

1. Click the link in the Trigger column.

> **Note:** If the Trigger column doesn't appear in the Tracking profiles list, click the **Update Personalized List** icon and add the Trigger column to the selected list.

The Profile trigger form opens, where you can modify the import run time (how often the script runs) or set a condition.

2. To manually execute the script, click **Execute Now**.

Create a Content Analytics tracking profile

Use Tracking Profiles to configure your ServiceNow content analytics dashboards.

Before you begin

Role required: sn_cda.analytics_admin

Tracking profiles define:

- What website you want to collect data from.
- From what time zone a day starts and ends for data tracking.
- From what time zone the time data collection should start.
- What countries you want to exclude in your analytics data collection and where you want to capture data from.

Procedure

1. Navigate to **All** > **Content Analytics** > **Setup**.
2. Click **New**.
3. Click **ServiceNow**.
4. Fill in the form.

Tracking Profile

Fields	Description
Name	A description of the tracking profile.
Active	Indicates that the profile is active and available to use. **Note:** If you attempt to deactivate a tracking profile that is in use, a warning message appears to confirm your actions.

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Fields	Description
Default	Indicates that the profile is the default profile. Portals use the default tracking profile when configured for tracking without setting a specific tracker. **Note:** The base system Employee Center (EC) uses the default tracking profile.
Owner	The user that is responsible for the profile.
Collection time zone	Defines when a day starts for data collection based on the time zone you select. A day starts at 12:00 AM and ends at 11:59:59 PM by default. For example, if you select System (America/Los_Angeles), that means a day starts at 12:00 AM PST.
Import run time	For the ServiceNow profiles, the time and the time zone data moves from the content analytics tables to the shared analytics tables. See Collected data.
Import run time zone	The time zone for the Import run time. For example, if you set the Import run time as 00: 00: 00 and System (America/Los_Angeles) as the Import run time zone, your data moves from the content analytics tables to the shared analytics tables at midnight, PST.
Restricted Countries	The countries of the users you do not want to track. **Note:** Restricted countries are based on the user profile (sys_user) and not the country the user is in at the time. Click **Insert a new row...** and select a country. If a country you want restricted does not appear, add it to the list by navigating to **Organization** > **Locations**.

5. Click **Submit**.

Result

The new tracking profile appears in the Tracking profiles list and the system creates a scheduled job to collect data. You can modify or manually execute the script associated with the scheduled job by doing these steps:

1. Click the link in the Trigger column.

Note: If the Trigger column doesn't appear in the Tracking profiles list, click the **Update Personalized List** icon and add the Trigger column to the selected list.

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The Profile trigger form opens, where you can modify the import run time (how often the script runs) or set a condition.

2. To manually execute the script, click **Execute Now**.

Set up Content Analytics tracking

To use Content Analytics with custom pages or widgets, add the tracking profile to your Employee Center or service portal theme header and add the cdaAnalytics service to your custom widgets.

Before you begin

Role required: sn_cda.analytics_admin

About this task

More steps for page tracking:

Add the tracking profile to your Employee Center or service portal theme header.

```
<widget
id="cda-site-analytics"
options="{ 'tracking_profile_name': '{PROFILE_NAME}',
 'enable_logging': false}"
></widget>
```

Note: If you don't specify a tracking profile in the options, content analytics tries to use the default tracking profile. See Create a Content Analytics tracking profile.

Procedure

1. Navigate to **All** > **Service Portal** > **Headers & Footers**.
2. Select your header (Content Publishing Header, Employee Center Header, ESC Header, or HRMadrid Header).
3. If necessary, clone the header.
   For more information, see Service Portal configuration page. Or, you can use Angular Providers, see Reuse components with Angular Providers.
4. If using a clone from the Content Publishing header, search for the cda-site-analytics widget tag in the **Body HTML template** field.
5. Then replace PROFILE_NAME with the profile that you want to use for tracking.
   For more information, see Configure a portal header menu.
6. If you're using a different header, add the following to the Body HTML and replace PROFILE_NAME:

   ```
   <widget
   id="cda-site-analytics"
   options="{ 'tracking_profile_name': '{PROFILE_NAME}',
    'enable_logging': false}"
   ></widget>
   ```

   If you don't specify a tracking profile in the widget options, content analytics tries to use the default tracking profile (if it exists).

   Track Employee Center events

   To track Employee Center events, add the cdaAnalytics service to your custom widgets. See Widget developer guide.

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For example:

```
function ($scope, cdaAnalytics) {
$scope.onButtonClick = function() {

// track event using the default tracker (no argument for
 getTracker)
cdaAnalytics.getTracker() .then(function(tracker) {
tracker.trackEvent(
'{Desired Category}',
'{Desired Action}',
'{Desired Name}'
);
});

// track event using specific tracker
cdaAnalytics.getTracker ('Human Resources Portal
 Tracker').then(function (tracker) {
tracker.trackEvent(
'Human Resources',
'Video Viewed',
'Open Enrollment 2018'
);
});
};
}
```

7. Navigate to **Service Portal** > **Widgets**.
8. Select a widget or create one.
9. Add cdaAnalytics to the Related List of Angular Providers.
10. Update the client controller of the widget to use the cdaAnalytics service.

Quick start tests for Employee Center Pro

Validate the continued functionality of Employee Center Pro after any configuration change such as an upgrade or after developing an application. Copy and customize these quick start tests to pass when using your instance-specific data.

All test suites and tests should pass on a default implementation. To validate a custom implementation, copy the automated tests and configure them for your customizations.

Quick start tests are disabled and read-only test templates. By default, they only produce a pass result when you run them with the default demo data that is provided with the application or feature plugin.

To make quick start tests produce a pass result when you run them with your instance-specific data, copy and configure them to use your instance data.

Use Performance Profiling to compare tests to detect performance degradation when you upgrade your instance, so you can investigate and fix the issues. See Performance profiling.

The Agile Development 2.0 (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests (com.snc.sdlc.agile.2.0.atf) plugins must be enabled.

Note: When running, demo data is required.

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Employee Center Pro

Employee Center Pro quick start tests

Test	Description	Release version
Create Adhoc Delegation for Approval Task	Ensures an adhoc delegation for an approval task can be created from the My Tasks form in the Employee Center.	San Diego
Create Adhoc Delegation for HR Task	Ensures an adhoc delegation for an HR task can be created from the My Tasks form in the Employee Center.	San Diego
Employee Center - My Favorites	Verifies the favorite functionality in the Employee Center. Also verifies when a KB article or catalog item is added to the Favorite widget.	San Diego
Employee Center - Approval Hub Approve Request	Verifies the approval functionality in the Employee Center. Also verifies that when a request is approved, it appears in the user's **Completed** column.	San Diego
Employee Center - Approval Hub Reject Request	Verifies the rejection functionality. Also verifies that when a request is rejected, it appears in the user's **Completed** column.	San Diego
Employee center - Employee Profile Generation	Verifies that employee profiles are generated as per the employee definition.	Xanadu
Employee Center - Topic Page	Associates a KB article or catalog item to a topic and verifies they display on the topic page.	San Diego
Employee Center - Validate home page widgets	Validates the following widgets are present on the Employee Center home page: • Relevant for you • Popular topics • My Active Items • Quick tasks • Homepage Search	San Diego
Employee Center Pro - App launcher	Verifies the following on the My Application page:	San Diego

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Employee Center Pro quick start tests (continued)

Test	Description	Release version
	• Creates an application and verifies it is visible on the application page. • Creates a topic/category and associates the application and verifies it is visible under the topic and category.	
Employee Center Pro - Validate home page widgets	Validates the following widgets are present on the Employee Center Pro home page: • Content Experience • Recommended for you • Popular topics • Upcoming Events • My Active Items • Videos • App launcher • Homepage Search	San Diego
ESC: Employee can see ticket updates	Employees can view updates to their tickets.	Quebec
ESC: Post General HR Inquiry questions on ESC portal	Verifies an HR employee can create a General Inquiry case and post general HR inquiry questions on the ESC.	Quebec
ESC: Submit a Record Producer which creates Universal Request and HR Case	Verifies a user can submit an HR catalog item that creates a Universal Request. Also verifies the Universal Request and HR case are created and linked.	Quebec
ESC: Verify Standard Ticket page on ESC for HR Case	Creates a general inquiry case from the service portal and verifies it appears on the standard Ticket page.	Quebec
ESC: Verify widget contents in Catalog items	Verifies the widget content in a Catalog page.	Orlando
ESC: Verify widget contents in knowledge pages	Verifies the widget content in a Knowledge page.	Orlando

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Employee Center Pro quick start tests (continued)

Test	Description	Release version
HR: Search catalog items & KBs in ESC	Verifies the search functionality in the ESC.	Quebec
Taxonomy and Topic Creation	Creates taxonomy and topics and then adds content to the topic.	San Diego

Content Publishing

Test	Description	Release version
Content Publishing: Audience	Tests the audience configurations for Content Publishing.	Orlando
Content Publishing: Create Banner type content in SCA	Ensures the Create Banner type can be created when using Streamlined Content Authoring (SCA) under the Content Publishing module.	Rome
Content Publishing: Create Styled content (Video) type content in SCA	Verifies an admin can create styled content that is a video type using Content Publishing.	Rome
Create news content via Content Library	Creates and publishes a news article to the portal.	Xanadu
Content Publishing: Schedule Portal Content (Banner, Calendar, Event, and Rich Text	Creates and schedules test portal content.	Yokohama
Create and publish new styled content (block and banner)	Verifies that a user can create a styled content banner and block, and publish the content items to a topic page.	Yokohama

Content Experiences

Test	Description	Release version
Content Experiences: Create and Publish a Campaign	Creates and publishes a campaign with portal content.	Orlando
Create and publish campaign - Styled content (block), event, and calendar	Verifies that a user can create a campaign for immediate publication containing styled content (block), event, calendar content types.	Yokohama
Create and publish Fixed Date stage campaign - Styled Content (Block), Event and Calendar	Verifies that a user can create a campaign with a specific publication date containing styled content (block), event, calendar content types.	Yokohama

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Content Experiences (continued)

Test	Description	Release version
Content Experiences: Portal preview	Verifies that a campaign manager is able to preview portal content using the portal preview.	Rome
Content Experiences: Preview individual content before Publishing a Campaign	Verifies a campaign manager can preview any individual content for a campaign.	San Diego

Content Governance

Test	Description	Release version
Content Governance - New Content Request E2E Workflow	Provides end-to-end testing from creating a content request through publishing the content.	San Diego

Related topics

Quick start tests for Employee Center

Managing portal performance

Discover ways to reduce portal loading time and enhance portal display.

Review widget performance metrics

The **Performance details** feature provides comprehensive tracking of each widget on a page, enabling better assessment of the user experience. You can view load times, customization status, and display visibility for each widget. For guidance on accessing the widget performance metrics, see View widget performance metrics.

Enable asynchronous loading for widgets

By default, widgets try to load and display data simultaneously. This can cause longer load times in content-heavy portals. To improve loading speed and reduce employee wait times, select the **Asynchronous** option to enable widgets to display data as it becomes available, instead of waiting for all the data to load.

The following widgets support asynchronous loading:

- Content experience
- Recommended for you
- Popular topics
- Quick Links
- My applications
- My active items

Note: Performance tracking is not supported for widgets with asynchronous data loading enabled.

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For step-by-step instructions to enable asynchronous loading, see Improve portal load time with asynchronous loading and Configure Mega menu async load system properties.

Optimize connected content

To improve page load times, limit the number of connected content items in topics. Connect only the required content to topics and remove any unnecessary content like outdated or unpublished versions.

For guidance on managing connected content, see Create and associate topics and Taxonomy and connected content.

Portal performance optimization

Learn more about the heavy-load and high-traffic scenarios and ways to optimize the user experience and portal performance.

Using the following performance enhancements, you can improve the overall user experience.

- **Optimized high-load experience**: Optimizes the employee experience during high usage such as live events, major announcements.

  For more information, see High-traffic experience.

- **Defer widget load**: Speeds up initial page rendering by loading only essential content first and deferring non-critical elements until later. Delay loading non-critical resources until after the main content is rendered.

  For more information, see Defer load in Employee Center.

- **Mega menu async load**: Loads resources or data asynchronously in the background without blocking the main thread.

  For more information, see Configure Mega menu async load system properties.

- **Skeleton load**: Improves perceived performance by displaying placeholder elements (like grey boxes or lines) while actual content is loading. This placeholder UI reassures employees that the system is functional and reducing the wait times.

Admins can select regular or light modes by configuring your widget instances.

Note:

- Skeleton loaders are not applicable to the customized widgets.
- Defer load configuration at the SP Portal level overrides the instance-level configurations.

Related topics

Configure Mega menu async load system properties

Modify defer load instance option

High-traffic experience

Improve portal load time with asynchronous loading

Reduce the time employees spend waiting for the portal to load by enabling widgets to load data asynchronously. This allows widgets to display information as it becomes available, improving overall portal performance.

Before you begin

Role required: sp_admin

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About this task

By default, widgets try to load and display data simultaneously. This can cause longer load times in content-heavy portals. To improve loading speed and reduce employee wait times, select the **Asynchronous** option to enable widgets to display data as it becomes available, instead of waiting for all the data to load.

Procedure

1. Navigate to **All** > **Employee Center**.
2. Go to the following widgets, press and hold the control key, right-click the widget, and then select **Instance Options**.
   - Content experience
   - Recommended for you
   - Popular topics
   - Quick Links
   - My applications
   - My active items

   Note: The following widgets support asynchronous loading.
3. Select the **Asynchronous** loading configuration option (wording can change, depending on the widget).
4. Click **Save**.

Related topics

Portal performance optimization

Manage connected content from topic pages

Improve the image load time on Employee Center

Use CDN URLs to reduce the load time of the banner images, background images, and app icons on the Employee Center portal.

Before you begin

Role required: esc_admin

Enable the System Property [sn_ex_sp.enable.image.url.support] for the feature support on the Employee Center portal.

About this task

You can manage the icon images, background images on the profile pages, banner images of the topic pages, by storing all of it in a local CDN server. It doesn't need to be fetched from the ServiceNow AI Platform® server.

The feature considerably improves the first load time of the graphics. The load time keeps improving as frequently you use and reload the pages.

The CDN URL support is available for the Popular topics, the Quick Links, and the My applications widgets.

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Note:

- My applications is only available with the Employee Center Pro license.
- The ServiceNow AI Platform® provides support to create and manage your own CDN server and URL. The configuration and maintenance are the responsibility of the customer.

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Topics**.
2. Select a topic to update the **Icon URL** and the **Banner Image URL**.
   Update the **Icon URL** and the **Banner Image URL** from your local CDN server. This enables you to have enhanced load time and better accessibility to the images.
3. Go to **All** > **Content Taxonomy** > **Quick Links**.
4. Select and item to update the **Background image URL** and the **Icon URL** from your local server.
5. Go to **All** > **Employee Center** > **Web Applications**.
6. Select a web application to update the **Application icon URL**.

Note:

- Popular topics and Quick links have base system preference set to the CDN URLs. If a URL image is available, the icons and images from the ServiceNow AI Platform® server are not used.
- My application has preferences set for the **Application icon**. You must delete the **Application icon** for the CDN URL to be detected and used.

View widget performance metrics

View the metrics provided by the performance window to identify which widgets take the longest to load data.

Before you begin

Role required: sp_admin

To track the performance of a custom widget, add a hotspot to the script: Add hotspots to track custom widget performance

About this task

The **Performance Details** window provides comprehensive tracking of each widget on a page, enabling better assessment of the user experience. You can view load times, customization status, and display visibility for each widget.

Widget Metrics

Time is shown in milliseconds (ms).

Widget Name	Instance	Server Time	Category	Displayed
News Feed	Latest news	467	Out of the box	Yes
Content Experience	CEW - Header	183	Out of the box	Yes
Content Experience	CEW - 3 column	128	Out of the box	Yes
Content Experience	CEW - 9 column	104	Out of the box	Yes
Upcoming Events (CD)	Upcoming events	9	Out of the box	No

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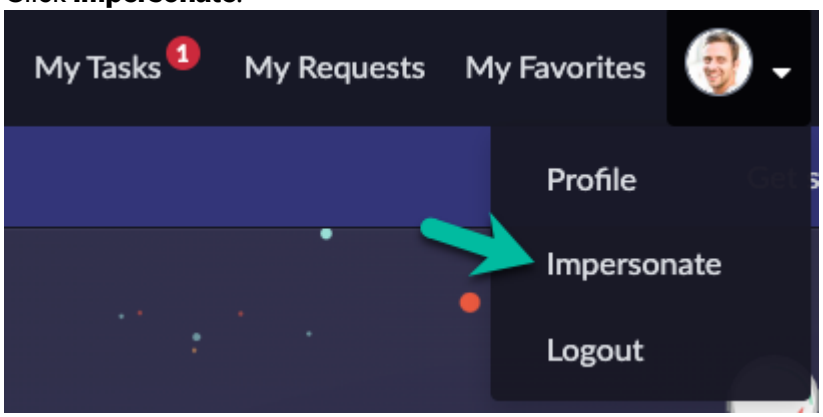
Procedure

1. Navigate to **All** > **Employee Center**.
2. Select the clock icon to open the **Performance details** window.
   The clock icon is located at the bottom-left corner of the screen.
3. Click **Enable Performance Stats**.
4. Click **Close**.
5. Impersonate a user to enable the system to capture widget load times for that user.

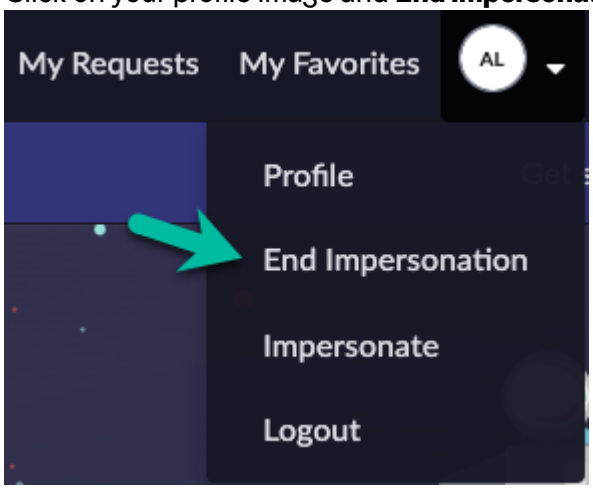
   a. Click on your profile image.

   b. Click **Impersonate**.



   c. Select the user to impersonate.

   d. Click on your profile image and **End impersonation**.



6. Select the clock icon to open the **Performance details** window.
7. In the **Search for user** field, select the user that you impersonated.
8. Review the **Server time** column to identify which widgets have the longest load times.
9. **Optional:** Export the data as an Excel file.
10. Click **Close** when you are done.

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Add hotspots to track custom widget performance

Hotspots help capture and log widget load times, which enables better debugging of long portal load times.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Widget**.
2. Click the custom widget you want to add the hotspot to.
3. Insert the following code snippets into the **Server script** field:
   Define a start time below the loading configuration expression:

```
var startTime = new GlideDateTime();
```

   Retrieve widget instance identifier:

```
data.spInstanceId =
                            grInstanceRecord.getUniqueValue();
```

   Add load time tracking:

```
new sn_cd.cd_Utils().postInstanceHotspot({
    startTime: startTime,
    callerId: data.spInstanceId,
    shortDesc: '{insert a short description}'
  });
```

4. Click **Update**.

What to do next

Open the Performance details window to view how long the custom widget takes to load data:
View widget performance metrics

Authoring and managing employee communications

Content managers and admins use Employee Center Pro capabilities to create employee communications, assemble multi-stage and multi-channel campaigns, manage content requests, and measure impact.

Content Publishing



Create, manage, and publish multi-channel content with ease.

Content Experiences



Add your content to a multi-stage, multi-channel "campaign" for targeted employee engagement.

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Content Governance	Content Analytics
End-to-end request, tracking, fulfillment, review, and approve capabilities to enable content requests from the greater org.	Measure the impact and success of your content.

Related topics

- Setup employee communications
- Setup continuous improvement

Creating employee communications

Content Publishing offers robust communications creation tools that enable you to create, manage, and publish a variety of content types including portal content, notifications, mobile content, and tasks.

Overview of creating communications

To create employee communications using Content Publishing, follow the process shown in this infographic.

Content creation process



1. Select the platform

   When creating a new piece of content, the first step is to select a platform. This determines where your content appears and narrows your selection of content formats.

2. Choose a content format

   After selecting the platform for your content, select from the available content formats.

3. Create a content record

   Fill in the fields in the New content form to provide details such as content item name and order.

4. Prepare the content

   Do the steps applicable to the content format, such as upload the image or video, assemble the banner or news article, or provide the URL.

5. Translate your content

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(Optional) Request a language translation for the content you are creating. For more information, see Multilingual support in the Content Library.

6. Configure publishing

   Configure publishing to control when the content becomes available, who can see it, and for how long. See Publishing content.

   Alternatively, you can build out a more robust publishing configuration using Creating campaigns

Platforms and content formats

Select a tile to learn about the available platforms and content formats, and to get started with creating employee communications.

Microsites  Assemble HTML-based rich content using a drag-and-drop interface.	News articles  Keep employees updated on company news and announcements.	Company events  Host live company events in the employee portal.
Portal  Create portal content in a variety of formats including video, URL, banners, and events.	Notification  Create email, push, and SMS notifications to send messages directly to your employees.	Mobile  Create content specifically for viewing on mobile devices.
To-do  Create tasks that prompt employees to take action.	Pulse survey  Send Pulse surveys to employees to obtain feedback.	Employee Forums  Create content that appears on employee forums.

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		Microsoft Teams  Send messages on Microsoft Teams to drive employee action.

Microsites

Rich Content Editor enables content managers and admins to create HTML-based content for the Employee Center Pro topic and portal pages using a visual drag-and-drop interface.

You can create a layout, add components (such as containers, images, videos, and links), and adjust the settings of the components with little or no HTML or CSS (cascading style sheets) knowledge. The Rich Content Editor allows non-technical users to build sections of pages without the help of IT or technical users.

The Rich Content Editor provides a library of components and a canvas area, where you use drag-and-drop method to create your content. The components can be edited individually and you can preview what you are creating on a desktop, tablet, or mobile device before you make your content available to your audience.

Overview of building microsites

The Rich Content Editor makes it possible to build HTML content with little or no HTML or CSS (cascading style sheets) knowledge, using the following process:

1. Create the Rich Content type record: Create rich content
2. Create the page layout.
   - Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
   - Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor
3. Add components such as images, videos, text boxes, and buttons.
4. Change the canvas size to create content for tablet and mobile.

   Note: For best results when creating content for all three platforms, first create your content for desktop, then tablet and mobile.

5. (Optional) Select a different language to view your session in or request a language translation for the content you are creating. For more information, see Multilingual support in the Content Library.
6. Make the content available to users via a publish plan: Create a publish plan for your content

   Alternatively, you can build out a more robust publishing configuration using campaigns: Creating campaigns

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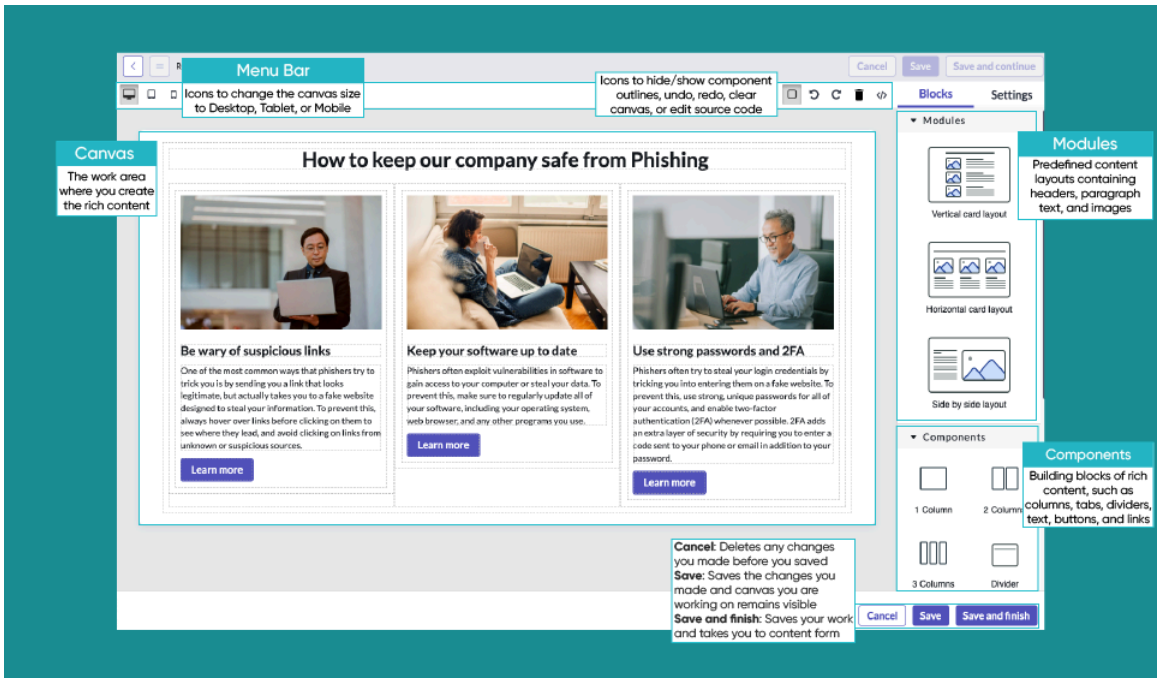
Rich Content Editor interface

The Rich Content Editor interface is comprised of a canvas where you assemble the content, content components that you drag-and-drop into the canvas, and menu bar icons to modify the canvas.

Note: If the Edit Source code icon does not appear, ask an admin to enable the **Edit code** property. See Properties installed with Content Publishing



When you select a component, a toolbar appears at its top-left corner, allowing you to manipulate the component directly. Each component offers a variety of customization options that are accessed from the **Settings** tab.

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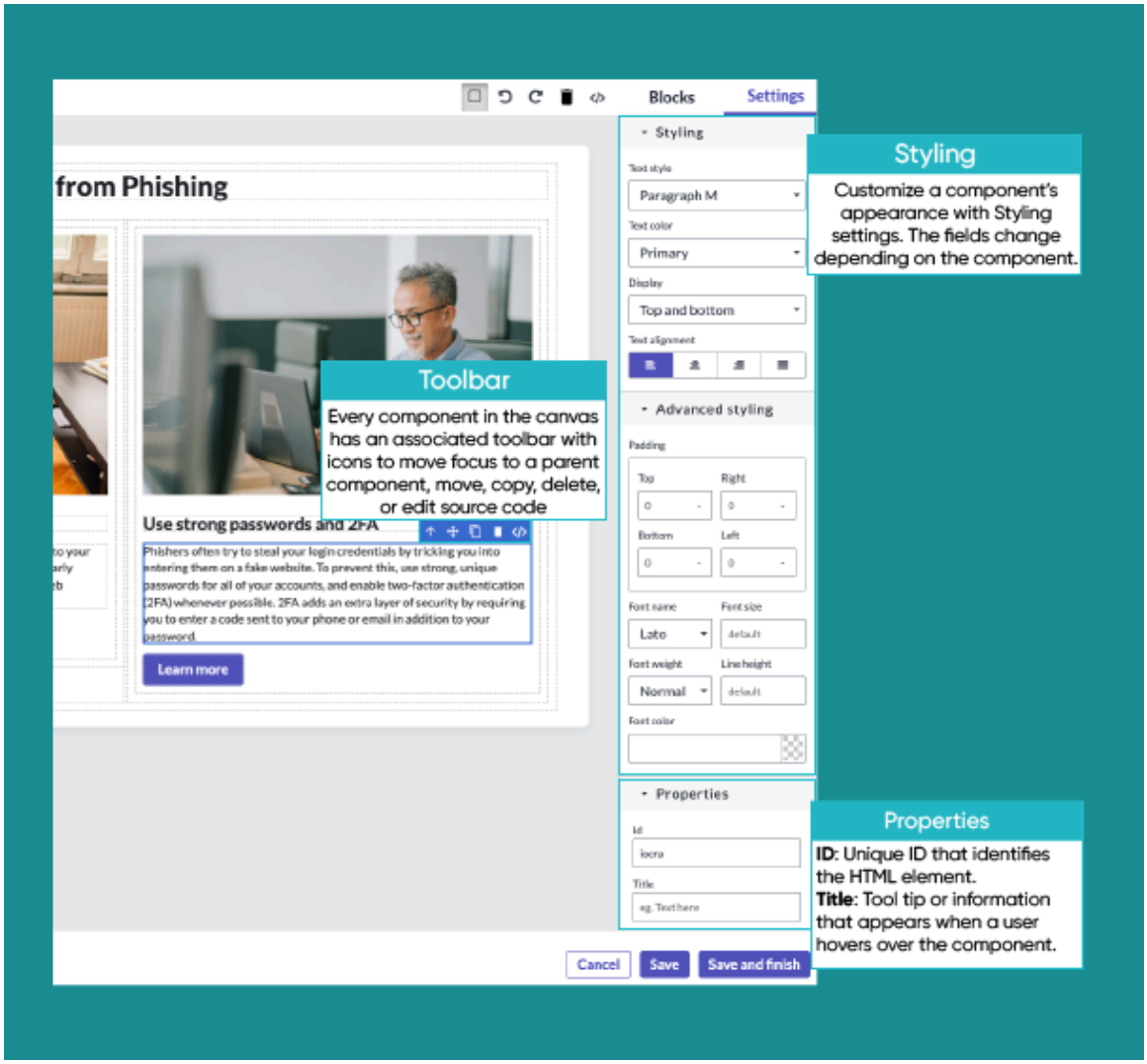

Keyboard shortcuts for accessibility

You can assemble microsites and news articles in the Rich Content Editor using a keyboard for improved accessibility.

The Rich Content Editor supports many operating system and text formatting shortcuts, including Save, Bold, and Undo. In Content Publishing versions 33.0.9 and later, users can navigate the top toolbar and style manager using the right, left, up, and down arrow keys. You can use these additional keyboard shortcuts to support your content creation:

Keyboard shortcuts

Action	Mac keyboard shortcut	Windows keyboard shortcut
Paste and match style of selected text box	Shift+Option+Command+V	Shift+Alt+Windows+V

See Next Experience keyboard shortcuts for additional information.

Searching for Rich content

When employees enter a keyword in the global search bar, Employee Center uses AI Search to return published pages containing that keyword in the content name or body.

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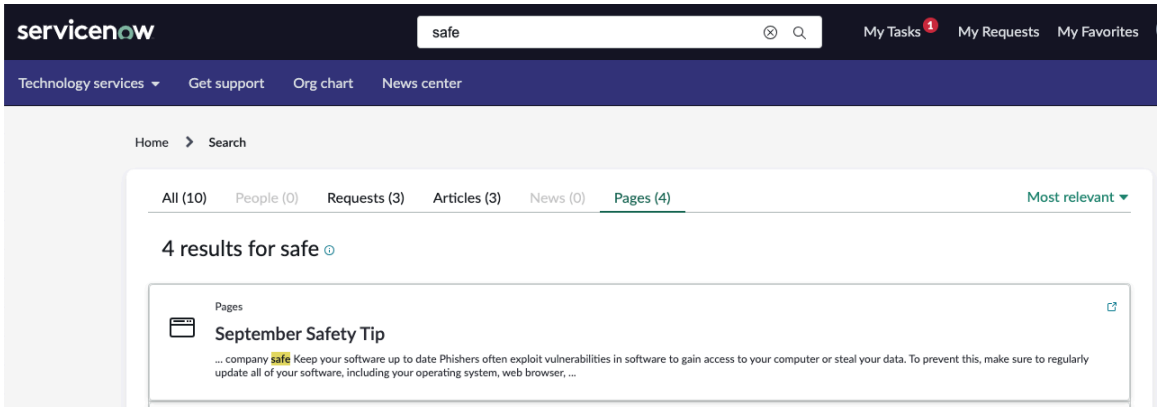

AI Search returns additional results based on user roles:

- Users with either the system admin or content admin role can see unpublished content.
- For users with the content manager, content admin, or content approver roles, search results include content for which they are not the audience. However, they cannot view the content unless they are part of the configured audience.

Related topics

Editing source code in the Rich Content Editor

Content versioning

Multilingual support in the Content Library

Create rich content

Use the Rich Content Editor to build long form content with an easy to use web styled tool.

Before you begin

Role required: sn_cd.content_manager

About this task

Rich content provides the ability to create and schedule long form content using a drag-and-drop method without the knowledge of coding. Rich content helps you to easily and visually create high quality curated content that matches the Service Portal look and feel with limited technical knowledge. You can target Rich content to any Portal page.

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Library** > **Create new**.
2. Select **Rich content** then **Continue**.
3. Fill in the fields in the **New content** form.

New content form

Field	Description
Content name	The name that describes the content you are creating or editing. **Note:** This field appears as the content header in search results.

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Field	Description
Order	The number that indicates the order in which the portal and styled content appears in the Content list.
Active	Indicates the content is active and available for use. **Note:** Since there is no direct method for migrating content records between ServiceNow® environments, we recommend you create content in your production environment and use the **Active** option and publish plans to control content availability.
Version	Tracks content changes if content versioning is enabled. For more information, see Content versioning.
State	Indicates whether the content is in draft or published.

4. Select **Open editor**.
   Selecting this button saves the information you entered above.

What to do next
Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

Create and edit content from portal widgets

Use the widget authoring shortcuts to create and edit rich, banner, styled, and news (edit only) content directly from the employee portal. When you use the widget shortcuts, the system generates a publish plan to deliver the content to that specific widget.

Before you begin
Role required: sn_cd.content_manager and editing permission for this topic or page. For more information on ownership permissions, see Content Ownership

About this task
The following widgets offer authoring shortcuts:

- Content experiences
- Rich Content
- News (edit existing news articles only)

Note: On the topic page, selecting any heading—including quick link headings—allows you to access **Instance options**. Within the instance window, you can modify the current heading levels. Once changes are made, select **Save** to apply the changes; the updated heading level will be reflected on the topic page, enhancing overall visibility.

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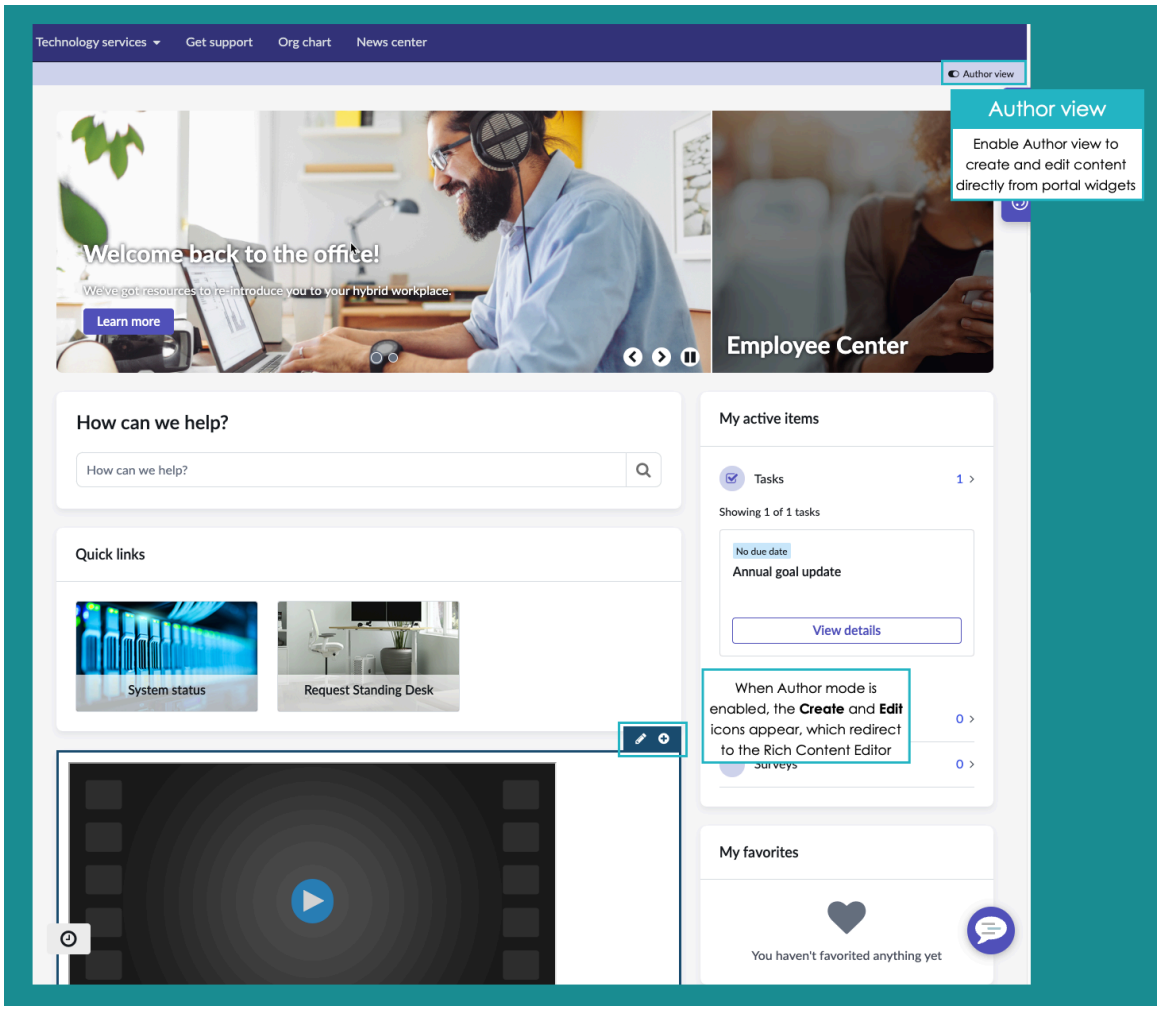
For more information on which widgets support which content type, see Publishing content.



Procedure

1. Navigate to **All** > **Self Service** > **Employee Center**.
2. Enable the **Author view** toggle.
   The **Add content** and **Edit content** icons appear above the Rich Content widget.
3. Click the **Add content** or **Edit content** icon.
   - If you click **Add content**, the new content form opens. Follow the content creation flow to create a content record and assemble the rich, banner, styled, or news content.
   - If you click **Edit content**, the Rich Content Editor opens where you can edit the content as needed.
4. Select **Save and Finish** to return to the content record.
5. Click **Save and continue** or the **Publish** tab.
   The system auto-populates a publish plan that targets the content to the widget.

What to do next

If necessary, modify the publish plan. See Create a publish plan for your content.

Related topics

Create rich content

Create a news article

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Create banner content

Create customized media with styled content

Add predefined content layouts with the Rich Content Editor

Use modules to easily add new content layouts containing headers, paragraph text, and images. Choose from layouts comprised of three vertical cards, three horizontal cards, or a side-by-side configuration with an image positioned to the right of a text block.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. Drag-and-drop the module you want to use from the **Blocks** panel.
3. Replace the placeholder headers and paragraph text with your content.
   For more information on styling the text and textboxes, see Add Text or a Text section with the Rich Content Editor.
4. To add an image, do the following steps:

   a. Double-click the image container.

   b. From the file picker pop-up, select an image.
   Or, if you have previously selected images, select the image from the available images on the right side of the **Select Image** pop-up.

   For more information on styling the image, see Add an Image with the Rich Content Editor.

   Note: Content Managers and Admins have the option to apply background colors to selected canvas elements, including images. Available features include the use of solid and gradient colors, as well as adjustments for color opacity. These settings can be accessed in the right-hand panel under the Settings Styling tab when adding rich content to a canvas element.

5. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

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- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add columns with the Rich Content Editor

Use the **Rich Content Editor** canvas to create columns to help define and organize your layout for your page.

Before you begin

Role required: sn_cd.content_manager

After you have completed the **New content** form (see Create rich content) and navigated to the Rich content canvas, you can create rich content.

You can add 1, 2, or 3 columns. Each column acts as a container for other components. Each column component can also be edited by selecting the component and updating the properties under settings.

Note: The minimum height for a cell within a column is 75px. If you set the cell height smaller, the cell overflows the row.

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Rich Content Editor** canvas, you can use a drag-and-drop method to add columns. Columns act as containers for the content you are creating.

Rich Content Editor



After you drop a **1 Column**, **2 Column**, or **3 Column** into the **Rich Content Editor** canvas, there are two separators that appear. The outside separator is labelled **Row**. The inside separator is labelled **Cell**.

Add styling to the row or cells, such as background color, maximum width, or padding. If you do not want to add styling, you can proceed to the links at the bottom of this page.

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3. Select a row or cell to edit.
4. Navigate to **Settings** tab.
5. Use any of the following styling settings:

> **Note:** Content Managers and Admins have the option to apply background colors to selected canvas elements, including images. Available features include the use of solid and gradient colors, as well as adjustments for color opacity. These settings can be accessed in the right-hand panel under the Settings Styling tab when adding rich content to a canvas element.

Styling settings

Settings field	Description
Styling	
Background Color	Use the color picker (grey square) to select a color or enter the color code that represents the background color you want to appear. All HTML colors are supported. For more information, see HTML color names. **Note:** Background color to canvas element shows the background options for gradient, color and image. Toggle on and then select background options.
Advanced styling	
Width	Specify the value by entering a number or dragging the right side of the cell. Select the unit of measure: ○ px: pixel ○ %: percentage
Height	Specify the value by entering a number or dragging the bottom of the row. Select the unit of measure: ○ px: pixel ○ %: percentage
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Margin (for rows only)	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Border (for cells only)	Define the width, border style, and color.
Border radius (for cells only)	Radius setting rounds the border corner.

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Settings field	Description
Properties	
ID	A unique ID that identifies the HTML element.
Title	A tool tip or information that appears when a user hovers over the component.

6. Select **Save**.

What to do next

Add and style more columns to create a layout for all the content on the page.

Then, add components such as images, videos, text boxes, and buttons:

- Add Tabs with Rich Content Editor
- Add a Divider with the Rich Content Editor
- Add an Image with the Rich Content Editor
- Add a Video with the Rich Content Editor
- Add Text or a Text section with the Rich Content Editor
- Add a Link or Link block with the Rich Content Editor
- Add a Button with the Rich Content Editor

Add a Divider with the Rich Content Editor

Add a horizontal Divider into your canvas to visually separate elements or highlight important sections.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Rich Content Editor** canvas, you can use a drag-and-drop method to add dividers.
3. Navigate to **Settings** tab.
4. Use any of the following styling settings:

Styling settings

Settings field	Description
Styling	

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Settings field	Description
Background Color	Use the color picker (grey square) to select a color or enter the color code that represents the background color you want to appear. All HTML colors are supported. For more information, see HTML color names.
Advanced styling	
Width	Specify the value by entering a number. Select the unit of measure: ○ px: pixel ○ %: percentage
Height	Specify the value by entering a number. Select the unit of measure: ○ px: pixel ○ %: percentage
Margin	Margin is the space between the divider and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Properties	
ID	A unique ID that identifies the HTML element.
Title	A tool tip or information that appears when a user hovers over the component.

5. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

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Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add an Image with the Rich Content Editor

Use the **Rich Content Editor** canvas to add images in your content.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

About this task

The Rich Content Editor supports the following types of images:

- .jpg
- .png
- .bmp
- .gif
- .jpeg
- .ico
- .svg

Note: Content Managers and Admins have the option to apply background colors to selected canvas elements, including images. Available features include the use of solid and gradient colors, as well as adjustments for color opacity. These settings can be accessed in the right-hand panel under the Settings Styling tab when adding rich content to a canvas element.

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Blocks** column, use a drag-and-drop method to move the **Image** component to your canvas.
3. Click in the file picker pop-up to select an image.

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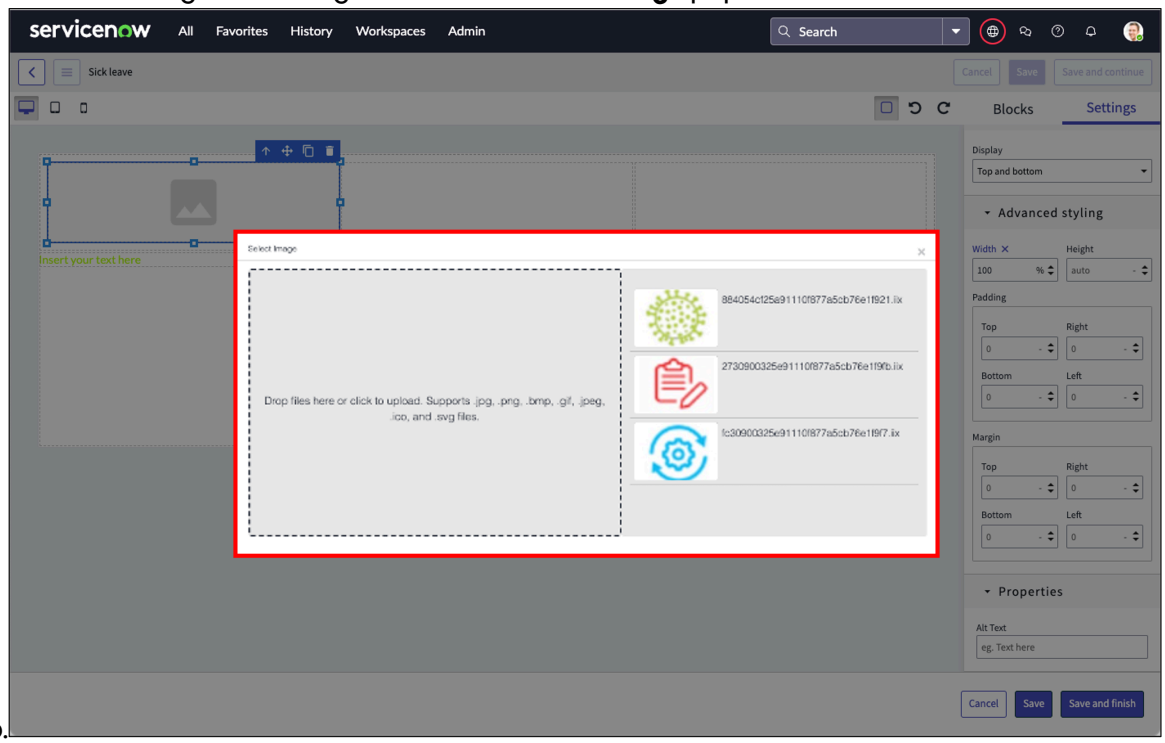
Or, if you have previously selected images, select the image from the available images on the right side of the **Select Image** pop-up.



4. Navigate to **Settings** tab.
5. Configure the following settings:

> **Note:** When adding images, videos, or text, there are several functional and convenient styling features that help create Rich Content and News Articles. Some of the right-hand panel options include the ability to enable different backgrounds, opacities and shadows, improved cells and buttons allow additional border settings, colors and types, as well as additional text styles, colors and fonts, and right-hand panel property setting improvements, which provide more available options when creating rich content.

Settings options

Settings field	Description
Styling	
Display	Configure the appearance of multiple components within the same column, such as an image and a text component. Select from the following options: ○ **Top and bottom** (default): Image appears above the other component. ○ **Side by side**: Image appears with the other component next to it.

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Settings field	Description
	Note: For best results, set the same display for the components. For example, if you have an image and text components in a column and want the image to appear on the left and the text to appear at the right, change the **Display** settings for both components to **Side by side**.
Horizontal align	Configure where the image appears in the container. Choose from the Right, Center, and Left icons.
Advanced styling When you insert an image into a container, by default the image is the full width of the container and the height auto-adjusts based on the image dimensions.	
Width and Height	Specify the value by entering a number or dragging the sides of the image. Select the unit of measure: ○ px: pixel ○ %: percentage
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Margin	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Background Color	Background color to canvas element shows the background options for gradient, color and image. Toggle on and then select background options. **Note:** Color Opacity shows the gradient and color layer options. Since background image layer is first, opacity isn't relevant. Gradient is **FFFFFF** and **OOOOOO** by default.
Properties	
Alt text	Describe the appearance or function of your image for accessibility purposes.

6. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

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What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add a Video with the Rich Content Editor

Use the **Rich Content Editor** canvas to add videos in your content.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

About this task

The **Rich Content Editor** supports the following types of video:

- HTML5

  Note: Hover-text or tool tips are not supported for HTML5 at this time.

- YouTube
- Vimeo
- Video streaming service

  Note: You must configure a content provider to use videos from a video streaming service. See Video hosting integrations framework.

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- Other

> **Note:** Additionally, if you want to add videos hosted on other sites that are public and require no authentication, you can add a video component and set the **Provider** to **Other**.

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Blocks** column, use a drag-and-drop method to move the **Video** block to your canvas.
3. Navigate to **Settings** tab.
4. Use any of the following styling settings:

> **Note:** When adding images, videos, or text, there are several functional and convenient styling features that help create Rich Content and News Articles. Some of the right-hand panel options include the ability to enable different backgrounds, opacity and shadows, improved cells and buttons add additional border settings, colors and types, as well as additional text styles, colors and fonts, and right-hand panel property setting improvements, which provide more available options when creating rich content.

Provider "Other"

5. Navigate to **Content Publishing** and select **Content Provider** and confirm that **Other** provider is listed.
6. Open Other and confirm that it's mapped to a**News Article** or **Rich Content**.
7. Update **glide.html.enable_media_sites** to add the video platform domain you're testing.
8. Create Create rich content or Create a news article and open the Rich Content Editor.
9. Add a **video component** and set **Provider** to **Other**.
10. Paste your public video URL from an allowed domain.
11. Save video.
12. Confirm that the video renders in **Rich Content Editor**.
13. Follow the additional setting options to configure video settings, as needed.

Settings options

Settings field	Description
Styling	
Horizontal align	Configure where the video appears in the container. Choose from the Right, Center, and Left icons.
Advanced styling When you insert a video into a container, by default the video is the full width of the container and the height auto-adjusts based on the video dimensions.	
Width and Height	Specify the value by entering a number or dragging the sides of the video. Select the unit of measure:

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Settings field	Description
	○ px: pixel ○ %: percentage
Margin	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Properties	
Title	Text that appears when a user hovers over the video.
Provider	Where the video is hosted. Choose from: ○ HTML5 Source ○ Vimeo ○ Youtube ○ Video streaming content providers ○ Other
Source/Video ID	The unique identification for the video you want to appear in your canvas. ○ For HTML5, the source is the unique identification for the video you want to appear in your canvas. ○ For YouTube, the video ID is the text that appears after the v= in the URL string. ○ For Vimeo, the video ID are the numbers that appear at the end of the URL string.
Show controls (Youtube and HTML5 Source)	Check this box to display the video player controls that your users can interact with to start, stop, control volume, show closed captions, show the video full screen, or change the video settings.

14. Select **Save** or **Save and Finish**.
Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

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- Preview your content from the **Publish** tab.

> **Note:** Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add Text or a Text section with the Rich Content Editor

Use the Rich Content Editor canvas to add **Text** or a **Text section** in your content.

Before you begin

Role required: sn_cd.content_manager

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

About this task

- **Text** provides the tools to format and arrange text.
- **Text section** provides the tools to format and arrange text and an area to add a headline.

> **Note:** For **Text section**, the headline, text, and container settings are configured separately.

When you copy and paste formatted content into the Rich Content Editor, the content retains its original formatting and appears in a new text box. Alternatively, you can use the browser toolbar option **Edit** > **Paste and Match Style** to paste the content as plain text, matching the formatting of the destination text box.

Pasting behavior:

- Clicking into the text box and pasting: The content appears at the cursor's position.
- Selecting the entire text box and pasting: The content appears in a new text box underneath

> **Note:** Content Managers and Admins have the option to apply background colors to selected canvas elements, including images. Available features include the use of solid and gradient colors, as well as adjustments for color opacity. These settings can be accessed in the right-hand panel under the Settings Styling tab when adding rich content to a canvas element.

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Blocks** column, use a drag-and-drop method to move a **Text** or **Text section** block to your canvas.
3. Enter text or text and a headline depending on what component you dropped into the column.
4. Navigate to **Settings** tab.

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5. Use any of the following styling settings:

> **Note:** When adding images, videos, or text, there are several functional and convenient styling features that help create Rich Content and News Articles. Some of the right-hand panel options include the ability to enable different backgrounds, opacities and shadows, improved cells and buttons allow additional border settings, colors and types, as well as additional text styles, colors and fonts.

Settings options

Settings field	Description
Styling	
Text style	Allows you to quickly change the look of your text by selecting a pre-formatted choice. You can select different headlines or paragraph styles. Headline 1-6 corresponds to h1 - h6 HTML tags.
Text color	Use this drop-down to change the color of your text. Your choices are: ○ Primary: The primary color defined by your portal theme. ○ Muted: The color defined by your portal theme. ○ White: Changes the color of your text to white. This is useful when using a background color other than white. Text color assigns predefined CSS classes for text color. **Note:** Font color might be white by default; however, this can be updated even with "white" selected. All properties will be cleared when changing the text styles and colors.
Display	Configure the appearance of multiple components within the same column, such as an image and a text component. Select from the following options: ○ **Top and bottom** (default): Image appears above the other component. ○ **Side by side**: Image appears with the other component next to it.

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Settings field	Description
	Note: For best results, set the same display for the components. For example, if you have an image and text components in a column and want the image to appear on the left and the text to appear at the right, change the **Display** settings for both components to **Side by side**.
Text alignment	Determines the horizontal alignment of your text. Choose from: ○ Left justify ○ Center justify ○ Right justify ○ Justify (text is aligned with both margins)
Add Text to list item (link)	Enables you to add text below a linked list item by pressing the Right Arrow key, then typing beneath the link.
Advanced styling	
Padding	Sets the spacing between the text and the border of the text container in pixels or as a percentage of the total text container. Specify the padding for the top, right, bottom, and left sides.
Font name	Defines the font face used to render characters. Click the drop-down arrow to select a different font.
Font size	Sets the size of the font.
Font weight	Determines how bold or light your text appears. Click the drop-down arrow to select a different weight.
Line height	Sets the vertical distance between two lines of text.
Font color	Overrides the font color from your portal theme. To select a color, enter the hex code or click the color picker (grey square to the right of the font color) and select a color from the color palette.
Properties	

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Settings field	Description
ID	A unique ID that identifies the HTML element.
Title	Text that appears when a user hovers over the component.

6. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add a Button with the Rich Content Editor

Add a Button to trigger actions or redirect users to different content.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

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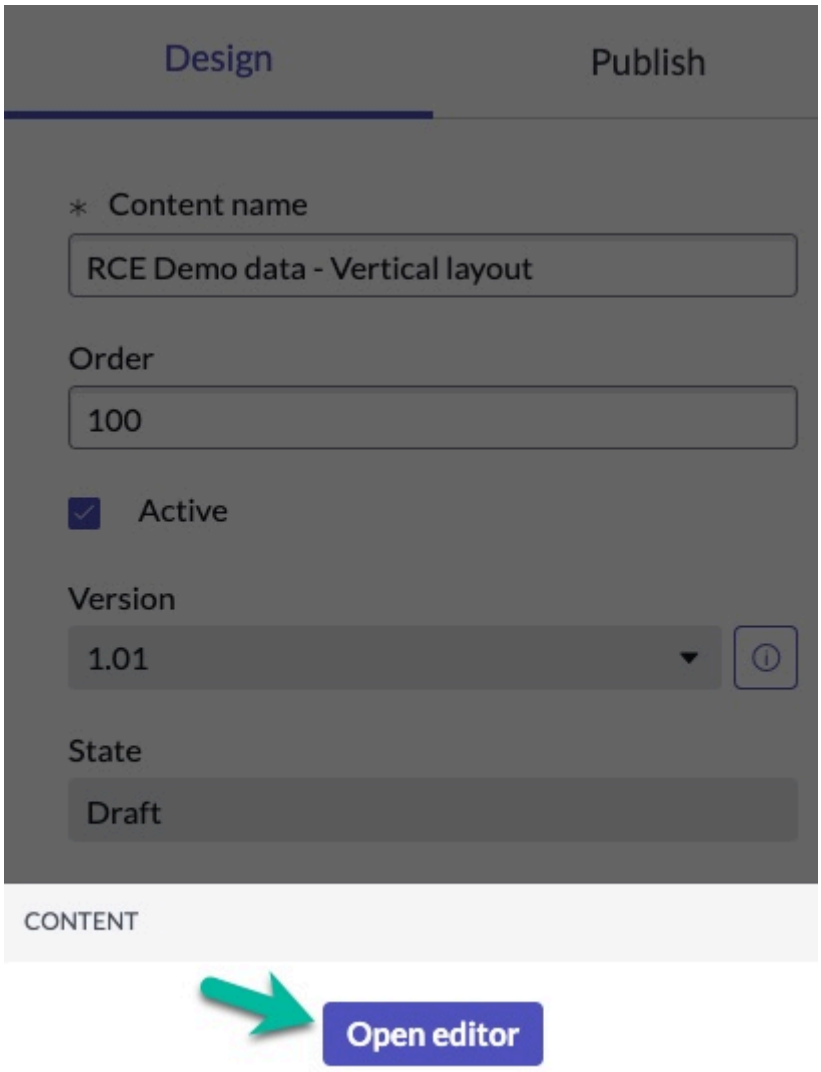
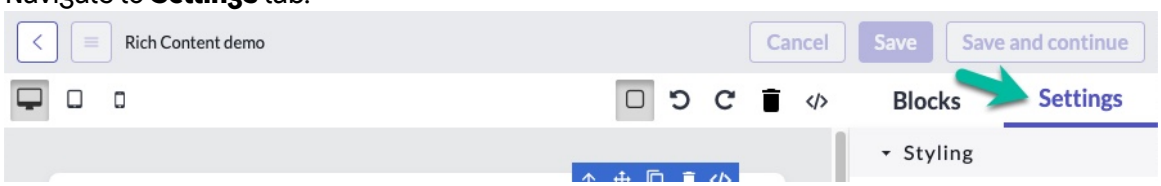
Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.



2. From the **Rich Content Editor** canvas, you can use a drag-and-drop method to add a button.
3. Navigate to **Settings** tab.



4. See full configration settings options.

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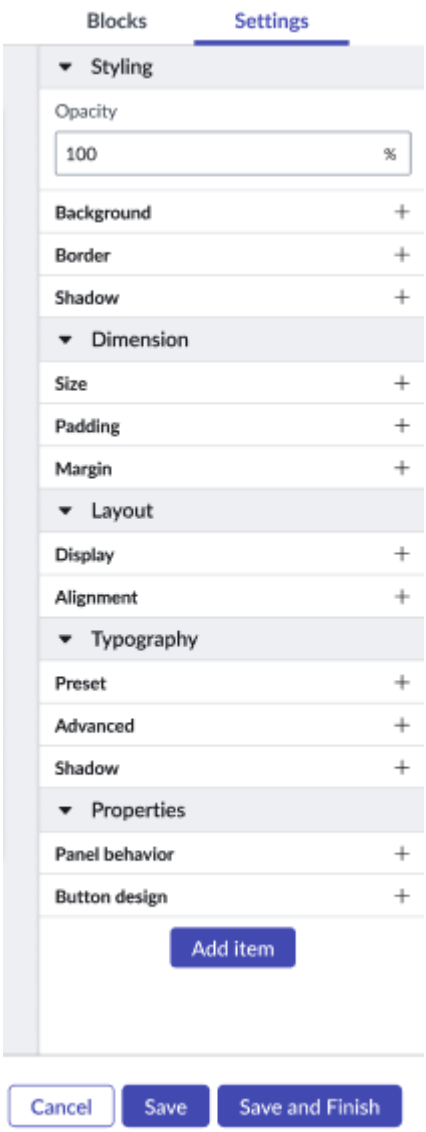

5. Use any of the following styling settings:

Note: Changing the button type or size will clear all other setting properties and values. The background-color layer will be removed when changing the button type, and some values might be affected by button size selections, such as font size, line height, padding and border radius.

Styling settings

Settings field	Description
Styling	
Button type	Defines what kind of button you are adding. Your choices are: ○ Primary (default) ○ Secondary

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Settings field	Description
	○ Link only **Note:** All properties and background color layers will be cleared when changing the button type.
Button size	Defines the size of your button. Your choices are: ○ X-Small ○ Small ○ Medium (default) ○ Large **Note:** All button size properties will be cleared when changing the button sizes.
Display	Configure the appearance of multiple components within the same column, such as an image and a text component. Select from the following options: ○ **Top and bottom** (default): Image appears above the other component. ○ **Side by side**: Image appears with the other component next to it. **Note:** For best results, set the same display for the components. For example, if you have an image and text components in a column and want the image to appear on the left and the text to appear at the right, change the **Display** settings for both components to **Side by side**.
Horizontal align	Sets the button alignment. Choose from left, center, or right.
Advanced styling	
Button color	Change the color of your button. **a.** Enter the color code that represents the background color you want to appear. **Note:** All HTML colors are supported. For more information, see HTML color names. **b.** Or, you can select the color picker (grey square) to the right of the **Background Color** field. **c.** Click into the color palette that appears.

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Settings field	Description
	d. After selecting a color from the color palette, use the slide bar on the right side to fine tune your color. **e.** Slide the bar up and down. **f.** Use the bottom slide bar to lighten or darken your color.
Width Height	Adjust the width and height of a button by selecting it and using the **Width** and **Height** drop-downs to enter number or use the up and down arrows. You can also choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows. The choices are: ○ auto: Size is based on the content within the tab. If you enter additional text in the tab, the width automatically increases. ○ px: Use pixels as your measurement. ○ %: Use a percentage as your measurement.
Margin	Adjust the margins or the space outside and around the button. Use the drop-downs under the **Margin** section to adjust the margins on the top, bottom, right, and left sides. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows.
Border	Edit the border around the outside of the button. **Note:** The border is the outline around the button. Width: Use the up and down arrows to adjust the width of the border. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows. Style: The format of the border around the button. Select the drop-down to select the type of border you want around the button. Color: The color of the border around your button. Select the color of your button using the color palette and slide bars similar to how you select your background color.

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Settings field	Description
Border radius	Use the up and down arrows to adjust the radius of the border. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows.
Font name	Defines the font face used to render characters. Click the drop-down arrow to select a different font.
Font size	Sets the size of the font.
Font weight	Determines how bold or light your text appears. Click the drop-down arrow to select a different weight.
Line height	Sets the vertical distance between two lines of text.
Font color	Overrides the font color from your portal theme. To select a color, enter the hex code or click the color picker (grey square to the right of the font color) and select a color from the color palette.
Properties	
Button label	Text that appears on the button.
Title	Text that appears when a user hovers over the button.
URL	Location of a web page or content. Enter the complete URL address you are targeting when a user selects the button.
Target	Indicates where the button directs the user. Your choices are: ○ This window: Selecting the button opens the content in the same window you have displayed. ○ New window: Selecting the button opens the content in a new window.

6. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

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What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add a Link or Link block with the Rich Content Editor

Use the **Rich Content Editor** canvas to add a link or a link block to redirect users to different content or a web page. A **Link** provides a textbox and a **Link block** allows you to add an image that acts as a link.

Before you begin

Role required: sn_cd.content_manager

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Rich Content Editor** canvas, drag-and-drop a **Link** or a **Link block**.
3. Navigate to **Settings** tab.
4. Configure the following settings:

Settings options

Settings field	Description
Styling	
Background color	Sets the background color for the link container.

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Settings field	Description
	To select a color, enter the hex code or click the color picker (grey square to the right of the font color) and select a color from the color palette.
Display (Link only)	Configure the appearance of multiple components within the same column, such as an image and a text component. Select from the following options: ○ **Top and bottom** (default): Image appears above the other component. ○ **Side by side**: Image appears with the other component next to it. **Note:** For best results, set the same display for the components. For example, if you have an image and text components in a column and want the image to appear on the left and the text to appear at the right, change the **Display** settings for both components to **Side by side**.
Add Text to list item (link)	Enables you to add text below a linked list item by pressing the Right Arrow key, then typing beneath the link.
Advanced styling	
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Font name (Link only)	Defines the font face used to render characters. Click the drop-down arrow to select a different font.
Font size (Link only)	Sets the size of the font.
Font weight (Link only)	Determines how bold or light your text appears. Click the drop-down arrow to select a different weight.
Line height (Link only)	Sets the vertical distance between two lines of text.
Font color (Link only)	Overrides the font color from your portal theme. To select a color, enter the hex code or click the color picker (grey square to the right of

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Settings field	Description
	the font color) and select a color from the color palette.
Properties	
Title	Text that appears when a user hovers over the link or link block.
URL	Location of a web page or content. Enter the complete URL address you are targeting when a user selects the button.
Target	Indicates where the button directs the user. Your choices are: ○ This window: Selecting the button opens the content in the same window you have displayed. ○ New window: Selecting the button opens the content in a new window.
Bulleted or numbered list (Adding link)	Adding links to a bulleted or numbered list of items. See, Add a List with the Rich Content Editor

5. If you added a Link block, drag-and-drop an Image into the Link block.
   For information on configuring an image, see Add an Image with the Rich Content Editor.
6. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

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Add a List with the Rich Content Editor

Add a numbered or bullet list to better organize your content.

Before you begin

Role required: sn_cd.content_manager

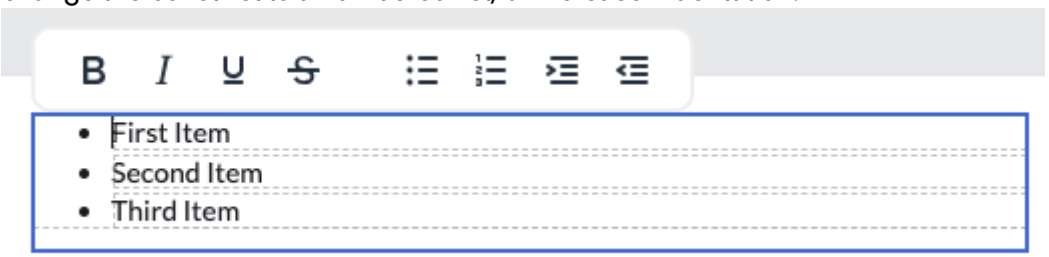
Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. Drag and drop a list component into the canvas.
3. Double-click within the list to open the text formatting bar, where you can format the text, change the bullet list to a numbered list, or increase indentation.



Note: You can also add a link to the bulleted or numbered list.

4. Navigate to the **Settings** panel to configure the following styling settings:

Styling settings

Settings field	Description
Styling	
Background Color	Use the color picker (checkered square) to select a color or enter the color code that represents the background color you want to appear. All HTML colors are supported. For more information, see HTML color names.
Advanced styling	
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.

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Settings field	Description
Font name	Defines the font face used to render characters. Click the drop-down arrow to select a different font.
Font size	Sets the size of the font.
Font weight	Determines how bold or light your text appears. Click the drop-down arrow to select a different weight.
Line height	Sets the vertical distance between two lines of text.
Font color	Overrides the font color from your portal theme. To select a color, enter the hex code or click the color picker (grey square to the right of the font color) and select a color from the color palette.

5. **Optional:** Select the **Properties** drop-down.

Properties

Field	Description
ID	A unique ID that identifies the HTML element.
Title	Text that appears when a user hovers over the component.

6. Select **Save** or **Save and Finish**.
Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

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Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add Tabs with Rich Content Editor

Add tabs to your rich content to help your users navigate efficiently by allowing them to select the various tabs to reveal the associated content within them.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

About this task

You can add other components under a tab, like an Image, Video, Text, Text section, Link, Link block, or Button. When you drop the **Tabs** component into your canvas, an area below the tabs appears that allows you to drop other components into it.

Note: When the **Tabs** functionality is not enabled, try reinstalling the Content Publishing application.

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. From the **Rich Content Editor** canvas, you can use a drag-and-drop method to add tabs.

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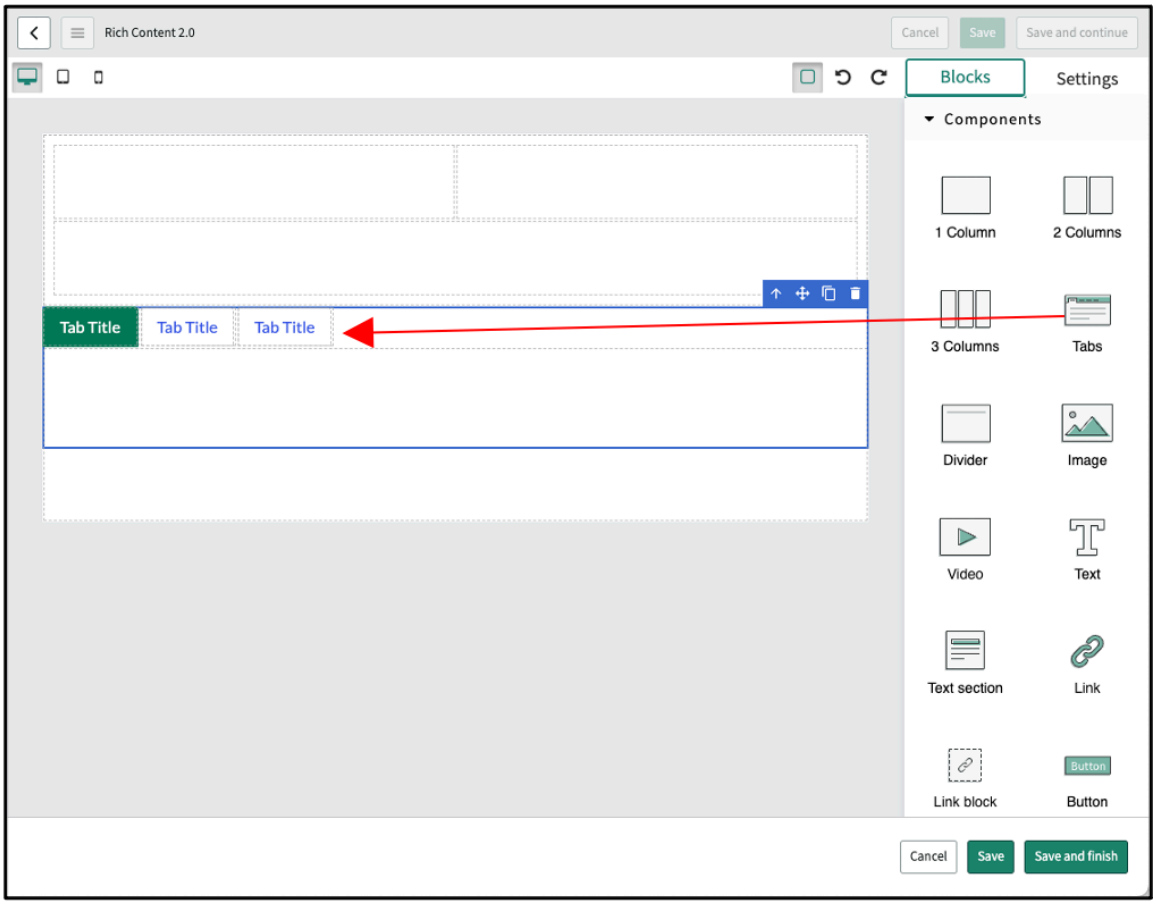
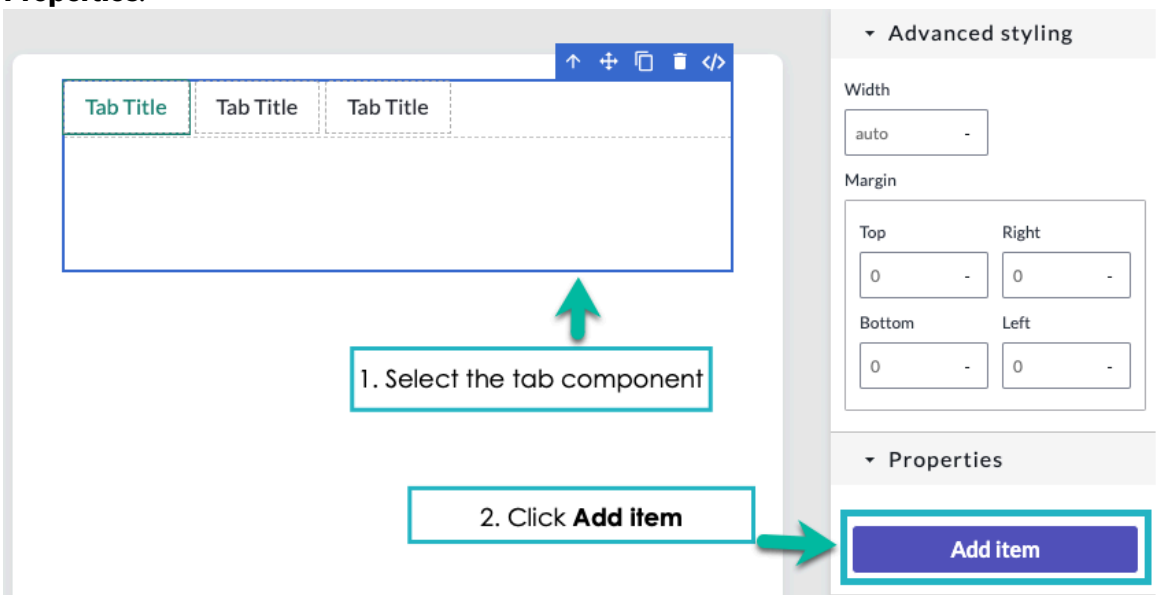


3. To add more tabs, select the entire tab component and click **Add item**, located in **Settings** > **Properties**.



4. Select a tab you added to your canvas.
5. To change the color of the tabs, first click into the color palette.
6. From the **Settings** tab, select **Styling**.
7. Enter the color code that represents the color you want to appear.
   All HTML colors are supported. For more information, see HTML color names.
8. Or, you can select the color picker (grey square) to the right of the **Background Color** field.

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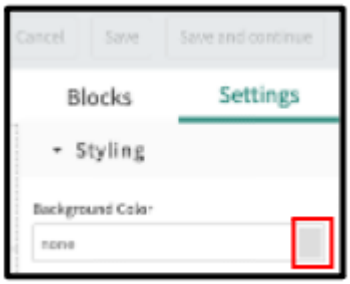
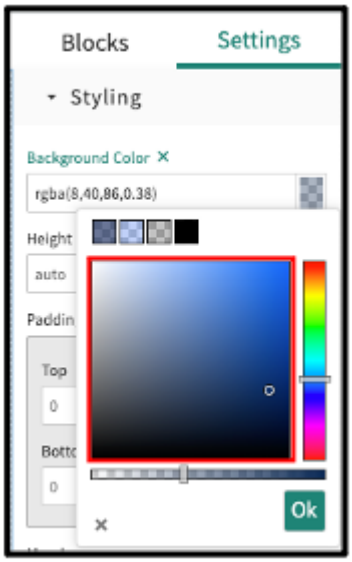
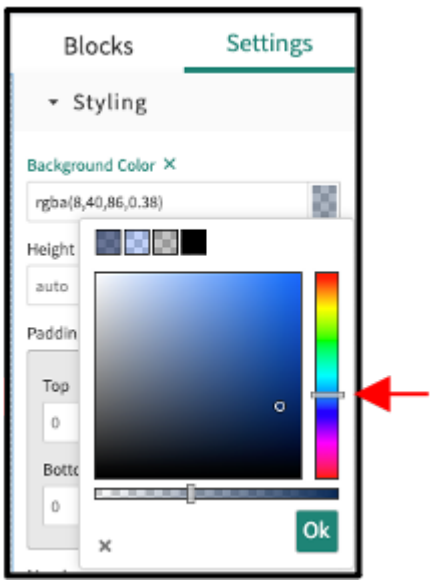


9. Click into the color palette that appears.



10. After selecting a color from the color palette, use the slide bar on the right side to fine tune your color.
    Slide the bar up and down.



11. Use the bottom slide bar to lighten or darken your color.

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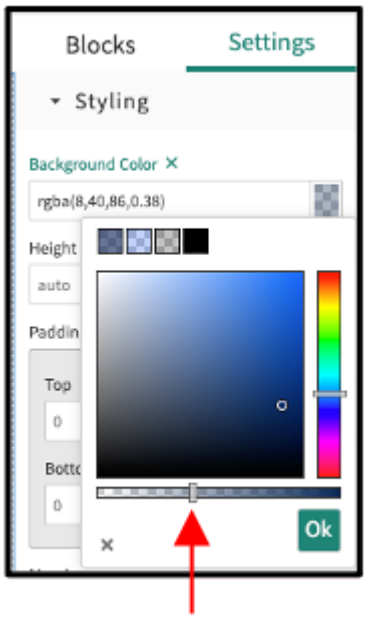
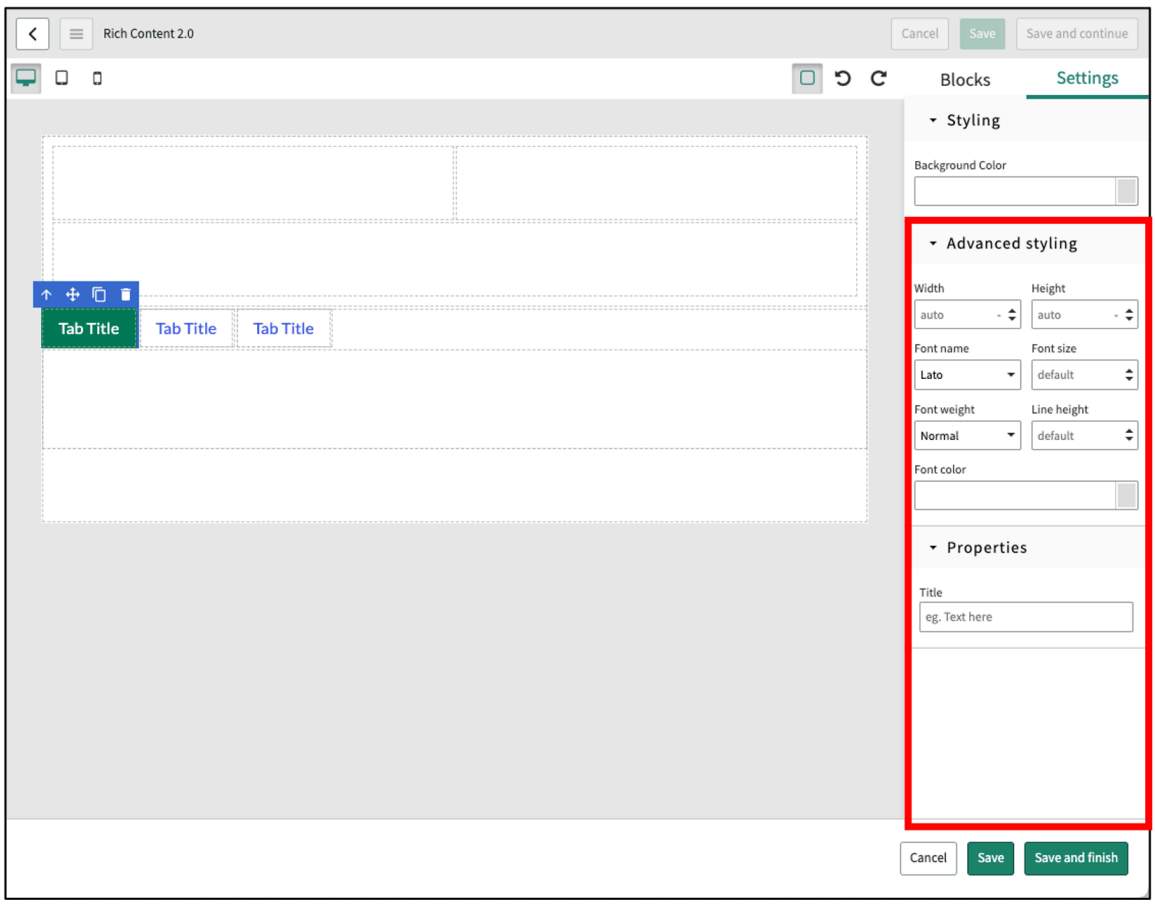


Note: When previewing your changes and you select the tab, the colors or outline of the tab may show the default colors of the portal theme.

12. You can edit or change the text that appears on the tab by highlighting **Tab Title** and overwriting it.
13. You can edit the size of each tab and the font of the **Tab title** by selecting a tab and then selecting **Advanced styling**.
14. You can drop other components into the area below the Tabs you added to your canvas.



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Advanced styling

Field	Description
Width	Edit the width of each tab by selecting it and using the **Width** drop-down. Your choices are: ○ auto: Size is based on the content within the tab. If you enter additional text in the tab, the width automatically increases. ○ px: Use pixels as your measurement. ○ %: Use a percentage as your measurement.
Height	Edit the height of each tab by selecting it and using the **Height** drop-down. Your choices are: ○ auto: Size is based on the content within the tab. If you enter additional text in the tab, the width automatically increases. ○ px: Use pixels as your measurement. ○ %: Use a percentage as your measurement.
Font name	Select the drop-down to choose a specific font.
Font size	Enter a number to change the font size or use the up and down arrows to make the font smaller or larger.
Font weight	Determines how bold or light your text on the button appears. Select the drop-down arrow to choose a different weight.
Line height	Determines the distance between lines of text. Use the up and down arrows to make line height smaller or larger.
Font color	Defines the color of the font. Select the color picker (grey square) to the right of the **Font color** field. Click into the color palette, and choose the color you want. Use the slide-bars on the right and bottom to fine tune your color. **Note:** When previewing your changes and you select the tab, the color of the text may show the default colors of the portal theme.

15. Edit the **Title** field under **Properties**.
    The text you enter appears as hover text for the tab and the screen reader announces it.

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16. Select **Save** or **Save and Finish**.
    Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
    Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add an Accordion with Rich Content Editor

Add an accordion component to the canvas to design content that can be expanded or collapsed.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. Drag and drop the accordion component into the canvas.

Configure accordion component behavior and toggle/button design, and add more panels.

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3. Navigate to the **Settings** > **Properties** section to configure the accordion component:

Accordion properties settings

Settings field	Description
Panel behavior	
Expand first panel on load	Selecting this option loads the accordion with the content in the first panel visible. If you deselect this option, the accordion loads with all the panels closed.
Allow multiple panels to expand	Selecting this option allows employees to expand multiple panels at once. If you deselect this option, when an employee expands a panel, the currently expanded panel automatically closes.
Button design	
Style	Select the style of the accordion button, or toggle, that employees click to expand and close panels.
Size	Use the up and down arrows to adjust the size of the buttons.
Placement	Specify whether the buttons appear to the left or right of the accordion titles.
Color	Use the color picker (checkered square) to select a color or enter the color code that represents the color you want to appear. All HTML colors are supported. For more information, see HTML color names.

4. To add more panels to the accordion, click **Add item**, located in **Settings** > **Properties**.

Configure the accordion styling, such as background color or border. Click the outer component container (Accordions) to configure all the panels at once. To configure individual panels, click the respective containers.

5. Navigate to the **Settings** panel to configure the following styling settings:

Styling settings

Settings field	Description
Styling	
Background Color	Use the color picker (checkered square) to select a color or enter the color code that represents the background color you want to appear.

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Settings field	Description
	All HTML colors are supported. For more information, see HTML color names.
Advanced styling	
Width	Specify the value by entering a number or dragging the right side of the cell. Select the unit of measure: ○ px: pixel ○ %: percentage
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Margin	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Border	Edit the border around the outside of the button. **Note:** The border is the outline around the button. Width: Use the up and down arrows to adjust the width of the border. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows. Style: The format of the border around the button. Select the drop-down to select the type of border you want around the button. Color: The color of the border around your button. Select the color of your button using the color palette and slide bars similar to how you select your background color.
Border radius	Use the up and down arrows to adjust the radius of the border. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows.

Format accordion title text.

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6. To format the accordion title text, click the **Accordion Title** container and navigate to the **Settings** > **Styling** section.

Accordion title styling settings

Settings field	Description
Styling	
Text style	Allows you to quickly change the look of your text by selecting a pre-formatted choice. You can select different headlines or paragraph styles. Headline 1-6 corresponds to h1 - h6 HTML tags.
Text color	Use this drop-down to change the color of your text. Your choices are: ○ Primary: The primary color defined by your portal theme. ○ Muted: The color defined by your portal theme. ○ White: Changes the color of your text to white. This is useful when using a background color other than white. Text color assigns predefined CSS classes for text color.
Display	Configure the appearance of multiple components within the same column, such as an image and a text component. Select from the following options: ○ **Top and bottom** (default): Image appears above the other component. ○ **Side by side**: Image appears with the other component next to it. **Note:** For best results, set the same display for the components. For example, if you have an image and text components in a column and want the image to appear on the left and the text to appear at the right, change the **Display** settings for both components to **Side by side**.
Align	Determines the horizontal alignment of your text. Choose from: ○ Left justify ○ Center justify

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Settings field	Description
	○ Right justify ○ Justify (text is aligned with both margins)
Advanced styling	
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Margin	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Font name	Defines the font face used to render characters. Click the drop-down arrow to select a different font.
Font size	Sets the size of the font.
Font weight	Determines how bold or light your text appears. Click the drop-down arrow to select a different weight.
Line height	Sets the vertical distance between two lines of text.
Font color	Overrides the font color from your portal theme. To select a color, enter the hex code or click the color picker (grey square to the right of the font color) and select a color from the color palette.

7. Build out the accordion content by adding images, videos, text, or links to the panels.
8. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

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Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Add a Table with Rich Content Editor

Add a table to your content to organize information in rows and columns.

Before you begin

Role required: sn_cd.content_manager

Fill in the New content form fields. See Create rich content

Create the page layout using modules or columns.

- Modules are predefined content layouts comprised of header, paragraph text, and images. See Add predefined content layouts with the Rich Content Editor
- Columns are containers that enable you to define a custom layout. See Add columns with the Rich Content Editor

Procedure

1. Navigate to the canvas by selecting the **Open editor** button from the **Design** tab of the **New content** form.
2. Drag and drop the table component into the canvas.
3. In the **Create new table** window, enter the number of columns and rows.
4. Create a table header row by navigating to **Settings** > **Properties** and selecting **Enable header**.
5. To format the header title text, click the text box in the header row and configure the following settings:

Table header settings

Settings field	Description
Styling	
Text style	Allows you to quickly change the look of your text by selecting a pre-formatted choice. You can select different headlines or paragraph styles.

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Settings field	Description
	Headline 1-6 corresponds to h1 - h6 HTML tags.
Text color	Use this drop-down to change the color of your text. Your choices are: ○ Primary: The primary color defined by your portal theme. ○ Muted: The color defined by your portal theme. ○ White: Changes the color of your text to white. This is useful when using a background color other than white. Text color assigns predefined CSS classes for text color.
Display	Configures the appearance of multiple components within the same column, such as an image and a text component. **Note:** This setting only applies in the case that you add another component next to the title text box. Select from the following options: ○ **Side by side** (default): Text appears with the other component next to it. ○ **Top and bottom**: Image appears above the other component. **Note:** For best results, set the same display for the components. For example, if you have an image and text components in a column and want the image to appear on the left and the text to appear at the right, change the **Display** settings for both components to **Side by side**.
Align	Determines the horizontal alignment of your text. Choose from: ○ Left justify ○ Center justify ○ Right justify ○ Justify (text is aligned with both margins)
Advanced styling	

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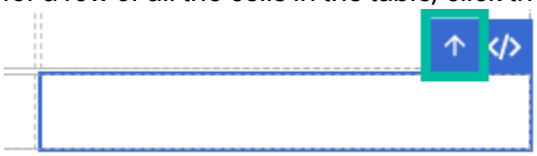
Settings field	Description
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Margin	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Font name	Defines the font face used to render characters. Click the drop-down arrow to select a different font.
Font size	Sets the size of the font.
Font weight	Determines how bold or light your text appears. Click the drop-down arrow to select a different weight.
Line height	Sets the vertical distance between two lines of text.
Font color	Overrides the font color from your portal theme. To select a color, enter the hex code or click the color picker (grey square to the right of the font color) and select a color from the color palette.

Click on a cell to configure the settings for that cell, such as the background color or border. To configure settings for a row or all the cells in the table, click the up arrow until your desired container is selected.



6. Configure table styling settings:
   Settings options will vary, depending on if you have selected a cell, row, or the entire table.

Styling settings

Settings field	Description
Styling	
Background Color	Use the color picker (checkered square) to select a color or enter the color code that represents the background color you want to appear.

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Settings field	Description
	All HTML colors are supported. For more information, see HTML color names.
Align	Determines the horizontal alignment of your text. Choose from: ○ Left justify ○ Center justify ○ Right justify ○ Justify (text is aligned with both margins)
Advanced styling	
Width Height	Adjust the width and height of the component using the **Width** and **Height** fields. You can also choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows. The choices are: ○ auto: Size is based on the content within the tab. If you enter additional text in the tab, the width automatically increases. ○ px: Use pixels as your measurement. ○ %: Use a percentage as your measurement.
Padding	Padding is the space between content and the border of an element. Specify the value for top, bottom, right, or left padding by entering a number.
Margin	Margin is the space between a row and another element/the canvas boundary. Specify the value for top, bottom, right, or left padding by entering a number.
Border	Edit the border around the outside of the button. **Note:** The border is the outline around the button. Width: Use the up and down arrows to adjust the width of the border. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows. Style: The format of the border around the button. Select the drop-down to select the type of border you want around the button.

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Settings field	Description
	Color: The color of the border around your button. Select the color of your button using the color palette and slide bars similar to how you select your background color.
Border radius	Use the up and down arrows to adjust the radius of the border. Just like the width and height, you can choose the unit of measure you prefer by selecting the single down arrow key to the left of the up and down arrows.

7. With a cell selected, use **Settings** > **Properties** to add or delete columns or rows, merge cells, and move rows up or down.

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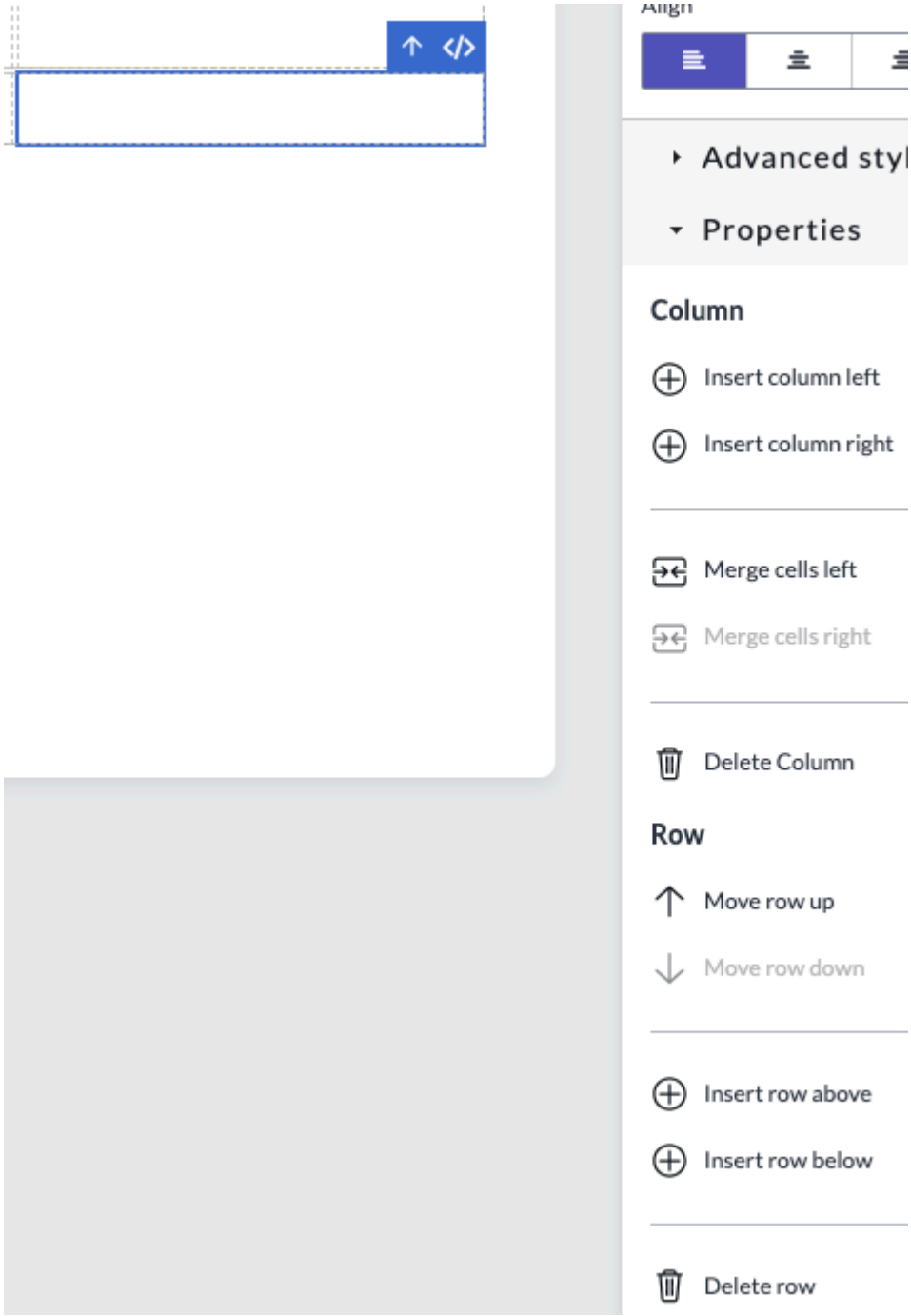

8. Select **Save** or **Save and Finish**.
   Selecting **Save** saves your content and you remain on the **Rich Content Editor** canvas.
   Selecting **Save and Finish** saves your record and returns you to the **New content** form.

What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

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Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

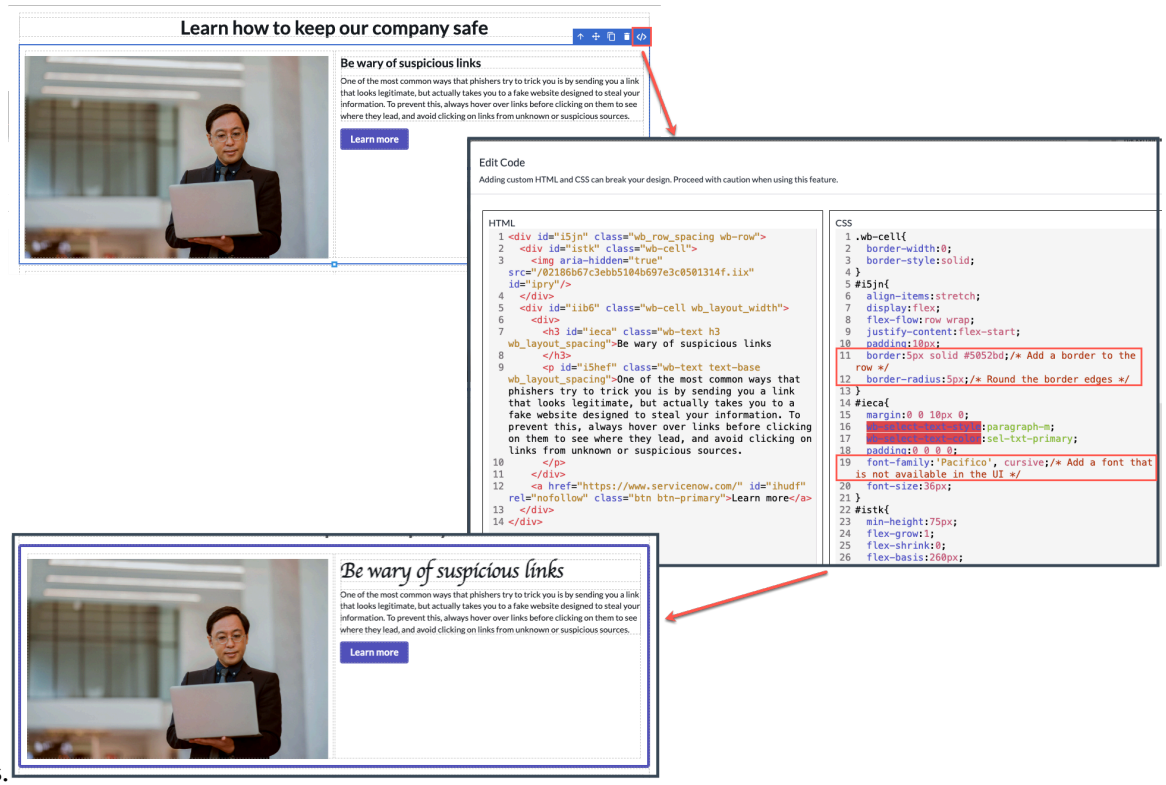
Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Editing source code in the Rich Content Editor

Modify the HTML and CSS source code for all the elements in the canvas or for a specific element.

Build the layout using HTML elements, directly edit the CSS for an element to add styling that isn't otherwise available in the canvas interface, or copy-paste code to migrate content from other sources.



Features and capabilities

Ensure portal security

When you click **Apply** in the Edit code window, the code editor removes HTML tags that could be used to compromise your instance. For more information, see HTML sanitizer.

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Identify important code

The editing window highlights CSS fragments in red if they should not be deleted. This indicates either a setting that is part of the portal theme or that multiple elements use that code.

Additionally, if you delete a CSS rule that is referenced by one of the following HTML elements, the code editor reinstates the CSS rule:

- Row
- Cell
- Canvas
- Divider
- Button
- Link block
- Tabs

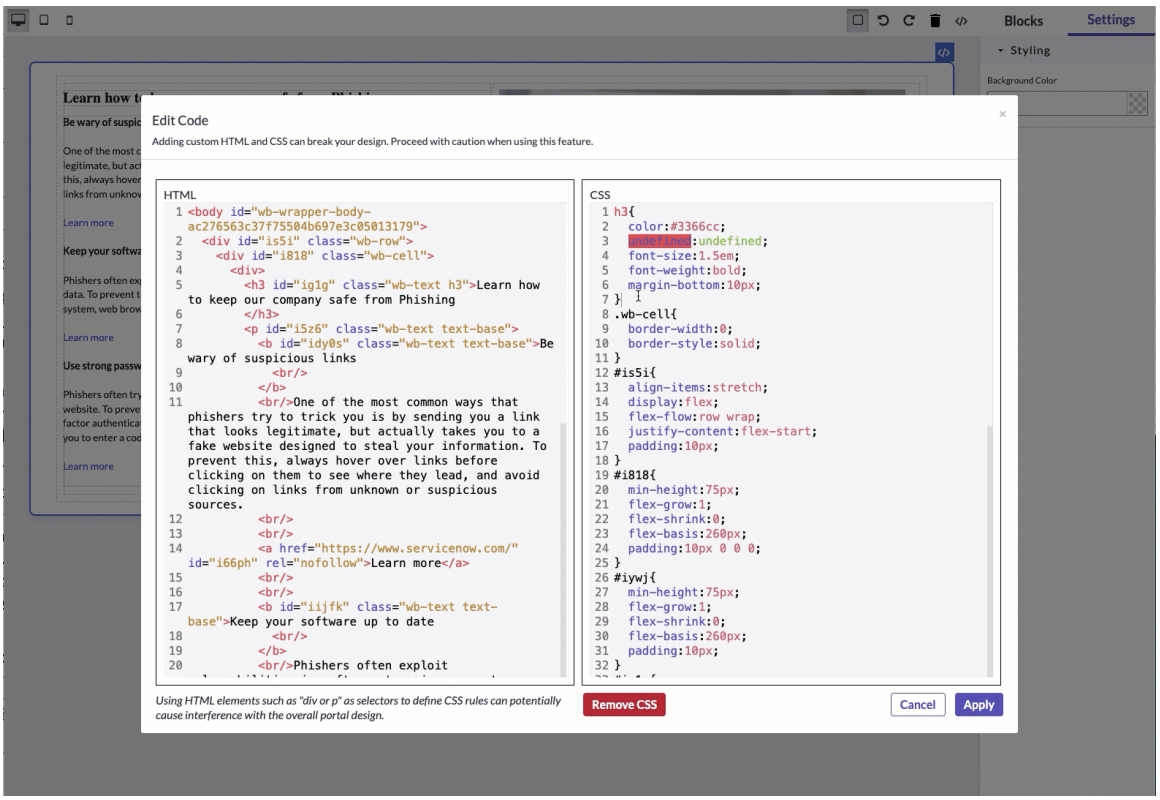
Remove unnecessary code

When you save your changes, the code editor removes any unused CSS rules.

Conversely, if the code editor reinstates a CSS rule that you are trying to remove, highlight that block of CSS code and click the **Remove CSS** button to override the code editor.

Example of using the Remove CSS button

In the following video, the user tries to delete a CSS rule using the delete key, but the system reinstates the code. Next the user highlights the code and clicks **Remove CSS**, which successfully removes the code.



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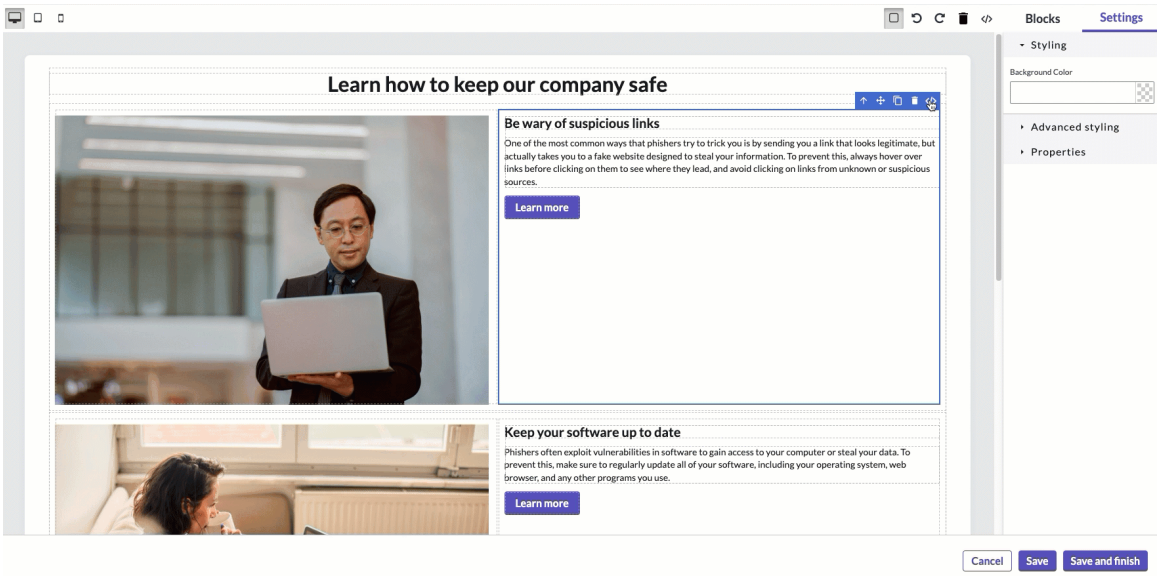
Note: This feature is not available by default. An Admin must enable the **Edit code** property. See Properties installed with Content Publishing

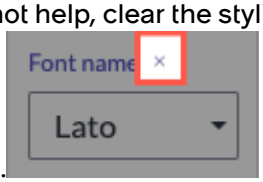
Important considerations

- Adding custom HTML and CSS can break your design. Proceed with caution when using this feature. The Rich Content Editor does not track changes in the code editor, so the **Undo** button will not reliably revert the code changes.
- We do not recommend using HTML elements (such as div or p) to define CSS rules, as that can have unintended consequences.

Example of an unexpected outcome when using HTML element to define CSS rule

In the following example, the user defines a CSS rule for the p element in a cell. However, in the page preview, the style rules apply to the p elements in all the text boxes, as well as in the footer.



- Different browsers may exhibit varying copy/paste behaviours. If pressing Ctrl+V does not duplicate the content as expected, click the duplicate icon in the component toolbar.
- If copy-pasted content does not retain its styling (such as font), and adjusting the settings does not help, clear the styling by clicking the “x" next to the styling field, then set the styling. 

- If pasted content appears differently saving, it likely due to some script tags being removed by the HTML sanitizer.

Copy and Paste in the Rich Content Editor

Copy and paste HTML and CSS source code for elements in the canvas.

Directly edit the CSS for an element to add styling, or copy-paste code to migrate content from other sources.

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Important: For the May 2025 release, if any pasted content has a **background-color**, the right-hand panel will not display the color unless it is formatted with **background-image styling**. The background acts as layers to add **background-color**, **gradient**, and **image** to your content. The edit code feature can be used to adjust the pasted styling from **background-color** to the corresponding value for **background-image CSS**, if you want the color to be displayed on the right-hand panel.

Tip: Color opacity functionality is a new feature and isn't supported in any prior release.

Limitations

- Browsers might display different copy-paste behaviors due to browser functional differences.
- Copying a component on canvas doesn't duplicate as expected on ctrl+v, so you must access the **component toolbar**.

Component Toolbar

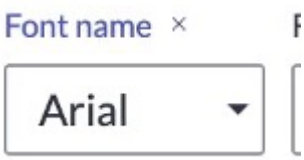


Note: You can also add color opacity to the canvas. However, one of the limitations is that copy/paste won't transfer all styling when the colors are formatted in **rgba()**instead of **rgb** or **hex**.

- Pasting highlighted text isn't supported within text components, so behaviors that work in Chrome might not work in Firefox or Safari.
- We recommend adding colors of pasted content in **hex code** format (**#rrggbbaa** to add opacity, or you can use **#rrggbb**).
  - The hash-tag (#) is required.
  - Hex codes start with a pound sign or hash-tag (#) followed by 6 letters if there is no color opacity, or 8 letters if there is color opacity.
  - The 8-character syntax only works if it is added to the element CSS through the edit-code feature. The color input field on the right-hand panel only accepts 6-character syntax.
- You can also open the edit code modal to adjust the **rgba()** colors of the component to hex code to reflect the styling.

If certain styling isn't applied (for example Font name) or adjusting any of the settings for the pasted content doesn't work, try to clear the styling first by selecting the "**x**" next to **Font name**.

Font name



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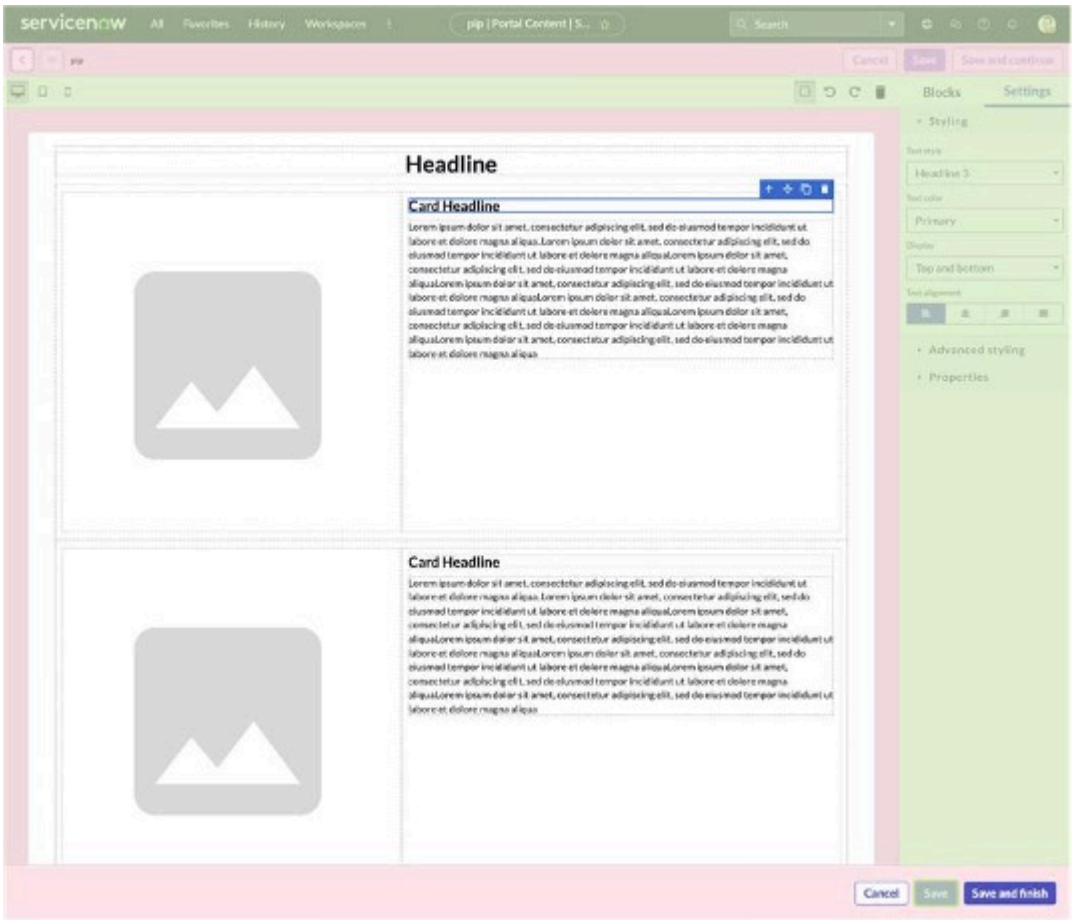
- If your pasted content doesn't display as expected or behaves incorrectly, try to copy a smaller chunk instead of a big section at once.
- • If your pasted content is displayed differently before and after saving and reloading, it might be due to some script tags removed by the HTML sanitizer.

Deselected Areas

- If you select the **Pink** areas, it deselects any component that is selected on the canvas.
- If you select the **Green** areas, it keeps the current component selected.

Rich Content Editor Canvas



Note: Cutting and pasting highlighted text isn't supported within text components and experiences across browsers might behave differently. Behaviors that work in Chrome might not work in Firefox or Safari.

Additional Rich Content Actions and Behaviors

Note: Content Managers and Admins have the option to apply background colors to selected canvas elements, including images. Available features include the use of solid and gradient colors, as well as adjustments for color opacity. These settings can be accessed in the right-hand panel under the Settings Styling tab when adding rich content to a canvas element.

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The ability to add color opacity to the canvas is a useful function available to you. The only limitation is that the copy and paste function styling is different when the colors are formatted in rgba() instead of rgb, or hex.

- Add colors in hex code format (`#rrggbbaa` to add opacity or just `#rrggbb`).
- Open the edit code modal to adjust the rgba() colors of the component to hex code to reflect the styling.
- Color Opacity shows the gradient and color layer options. Since background image layer is first, opacity isn't relevant. Gradient is FFFFFF and OOOOOO by default.
- Background color to canvas element shows the background options for gradient, color and image. Toggle on and then select background options.

Note: Content is pasted at the end of the canvas when no component is selected.

- If a component is selected, content pastes underneath it.
- If a component is being edited, the following paste behavior occurs:
  - If the source is plain text, the content pastes into the current component, and matches the pasted text to the destination styling.
  - If the source is formatted, it's appended under the most current component.
  - If the component enables nested components (for example Tab, Accordion, or Row), then content is appended within the parent container.
- If components are deselected when selected out of the canvas, it enables paste with source formatting.

For more information on editing source code, see Editing source code in the Rich Content Editor

News articles

The News article content type combines content creation features from the Rich Content Editor with new publishing methods that enable high volume content publishing to the portal and Now Mobile app to keep employees updated on company news and announcements.

News articles in the employee portal

News articles are delivered to users through customizable instances of the News Feed widget. The News Feed widget instances appear on the portal Home page, News and Events, Article detail page, and the emp_taxonomy_topic page. The admin can configure the News Feed widget to display news articles in a vertical list or as a three-column grid, add a call to action that links to another page, or to display the news categories. For more information, see Modify the News feed widget.

The Featured News widget appears at the top of the News and Events page to display highlighted news articles. For information on configuring the Featured News widget, see Modify the Featured News widget.

For ServiceNow instances that are on version Washington or later, the News and Events automatically appears as a menu option in the top-level navigation menu (mega menu) to give users quick access to all the published news articles. To remove it from the menu, see Hide News and Events from the Mega Menu.

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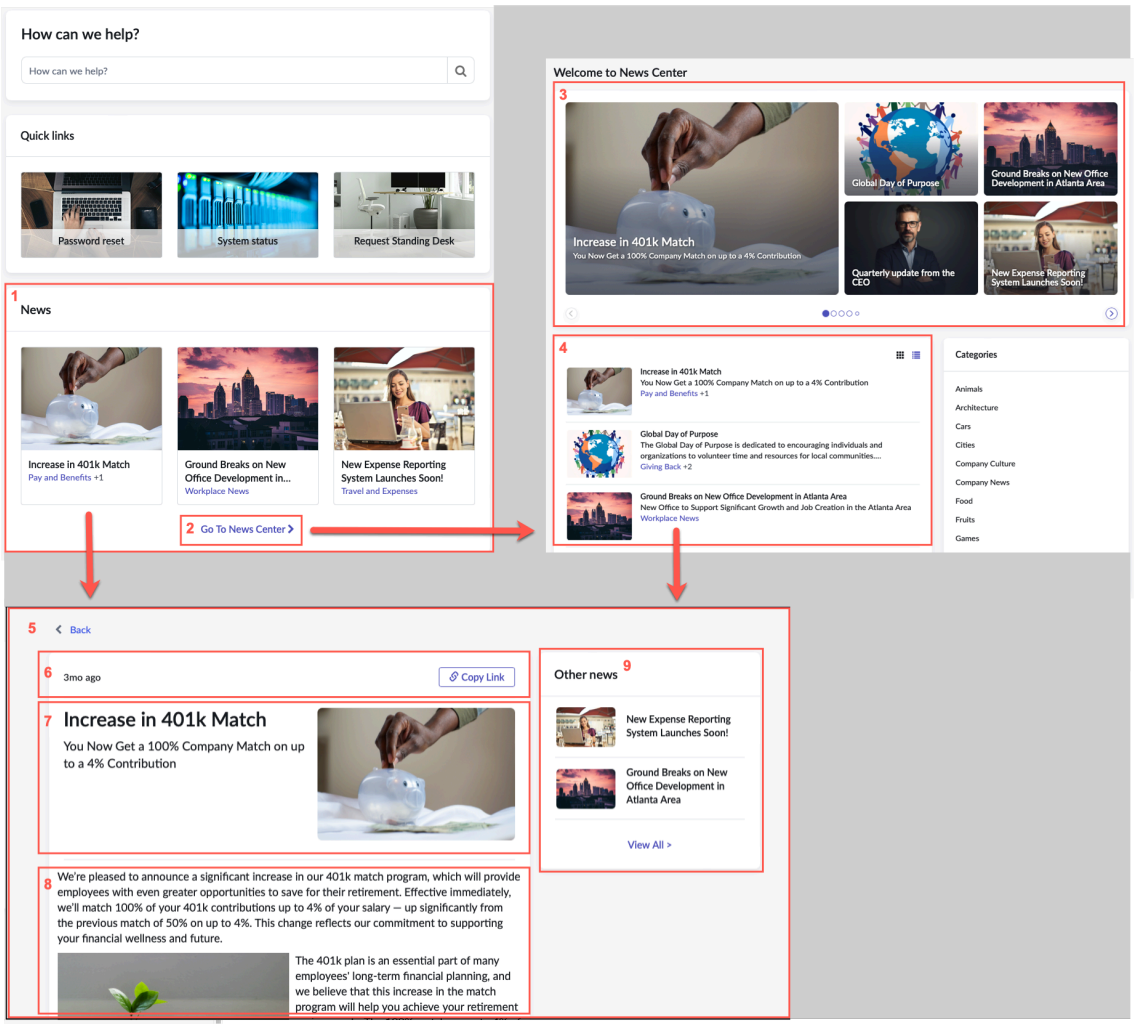
Review the following graphic to understand how employees see and interact with the widgets that display News articles:



1. News and Events widget displays highlighted articles on the home page
2. News and Events button opens the News Center page
3. Featured News widget displays highlighted articles in the News and Events page.
4. All news list uses the News feed widget to show news configured for delivery to this page
5. When an employee clicks a news article, the full article opens in the Article details page

   The three subsequent widgets (News info, News Header, and News Article Detail) work in tandem to display a news article. The three widgets contain the instance option **Use dataloader**. We recommend enabling this option as it allows the news widgets to share data with each other, which reduces calls to the server and web page loading time.

6. News Info widget: Holds the Published date and Copy Link button
7. News Header widget: Holds the headline, subheadline and image thumbnail
8. News Article Detail widget: Holds the article body as created in the Rich Content
9. Other news uses the News feed widget to show news configured for delivery to this page

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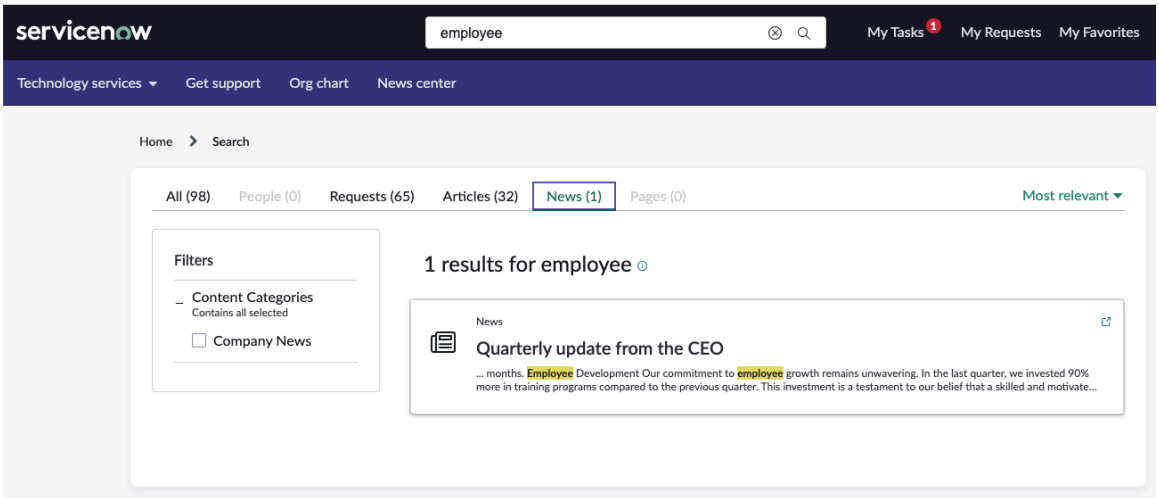
Searching for news articles

When employees enter a keyword in the global search bar, Employee Center uses AI Search to return published news articles containing that keyword in the heading, subheading, article content, or category.



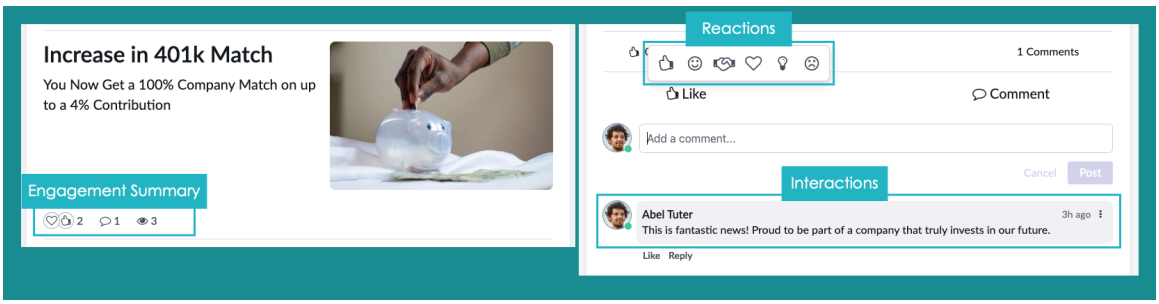
AI Search returns additional results based on user roles:

- Users with either the system admin or content admin role can see unpublished content.
- For users with content approver roles, search results might include content for which they are not the audience. However, they cannot view the content unless they are part of the configured audience.
- For users with content admin or content manager roles, search results shouldn't include content (such as news, company events or rich content) in AI search results if they don't meet the scheduled availability window, or for which they are not the configured audience.

Employee engagement with news articles

Content engagement enhances news articles by providing users with a way to comment and react to articles and for managers to measure the effectiveness of their content using engagement metrics. For more information, see Content engagement

Note: Some news articles and news and events might also be viewable on the event calendar widget. The calendar display provides a view of news feeds or new widgets, indicating days with scheduled events by date. The calendar view also provides the option to select a specific day and view a list of news-related events and feeds.



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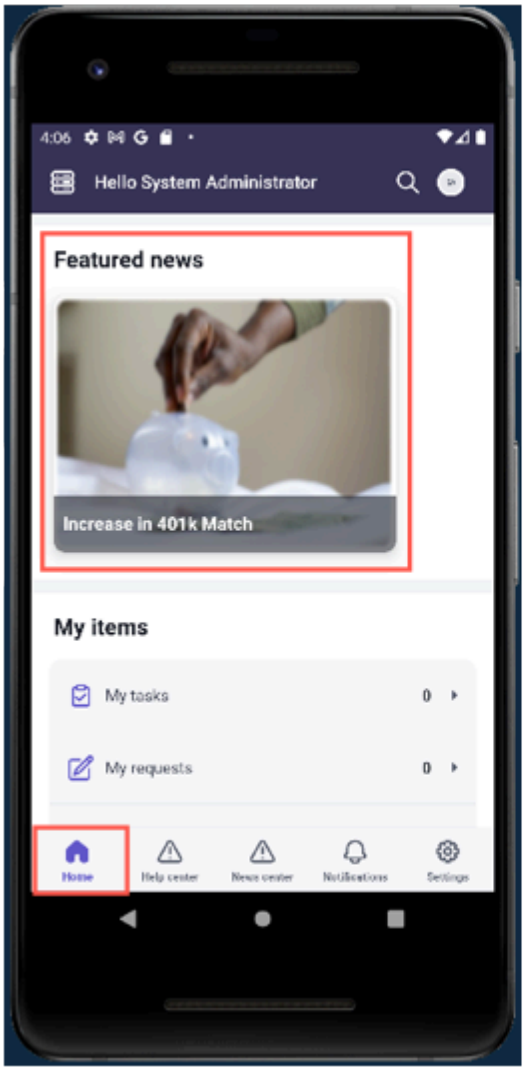
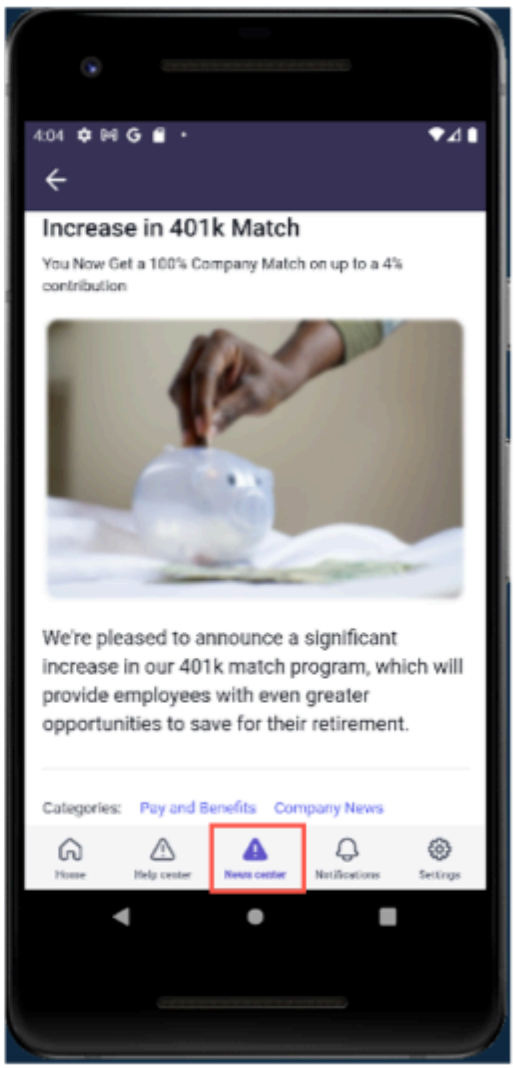
News articles in the Now Mobile app

The Now Mobile app features the News center screen, which displays the same News articles that are published to the News feed widget in the portal. In addition, content managers can configure News articles to appear on the Now Mobile app Home screen.





For information on the Now Mobile app user experience, see News in Now Mobile. For information on publishing news articles, see Create a publish plan for your content.

Organizing news articles

Content admins and managers can assign one or more categories to a news article, for example Industry news or Company culture. Once the article is published, employees can see the categories associated with an article when previewing it in the News Feed widget on the Home page or in the News and Event. An employee can click the category to open the Category page, which lists all the news articles associated to that category in reverse chronological order.

The following table demonstrates how categories enhance the user experience:

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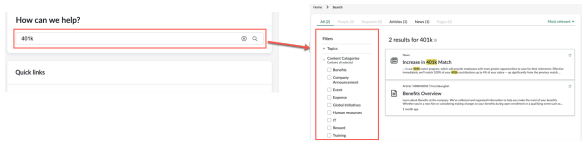
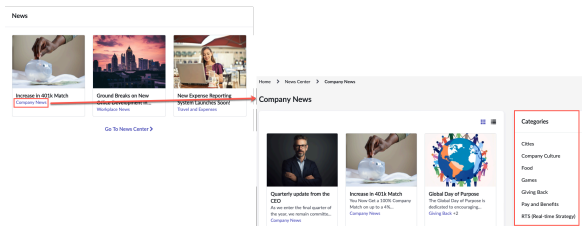
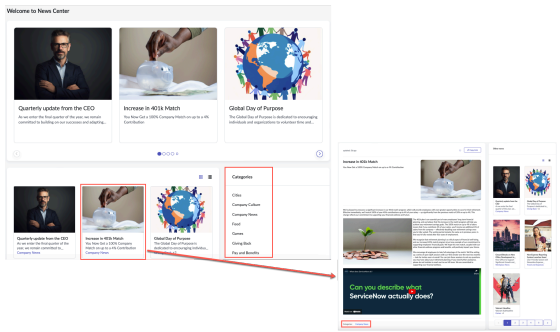
Categories capabilities with example screen shots

Capability	Screen shot
When an employee searches for a news article, they can filter the search results by news category.	
The News Feed widget displays the categories for each article, which link to a page for that category. Each category page lists the associated news articles, organized by publication date, with the most recently published articles displayed first. The page also holds a Category list widget with links to the other category pages. The widget displays the categories based on the configured order. If there are multiple categories with the same order value, the system lists them in alphabetical order.	
News and Event holds a Category list widget with links to the category pages. When an employee opens a news article, the Article detail page displays the news category at the bottom of the article.	

Boosting News article production

Content authors can increase their productivity by leveraging content templates to produce large volumes of News articles. A user with the sn_cd.content_template_owner role first creates a content template to define the article layout, publishing location, and audience. When a content author creates a new article, they can associate the news article to a content template to access a pre-built template and auto-generated publish plans.

For more information, see Content templates.

Customizing the News experience

The News and Event and Article Detail pages support other Content Publishing widgets. For example, you can configure the News and Event page to display upcoming events. For information on configuring the portal pages, see Creating portal pages.

To set a limit for the number of articles displayed in the News widget or to select different pages for the News and Event or Article display, see the News section of Properties installed with Content Publishing.

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If you plan to customize the News and Events or Article details page, we recommend that you create new pages and update the properties to redirect to the new pages. Some additional considerations include:

- The Article details page widgets require a `sys_id` query string parameter with the sys_id of the specific News Article.
- We recommend having a News Dataloader widget in the Article details page, and enabling the **Use Dataloader** option in the other widgets in the page. This facilitates data sharing between the widgets on the page, which reduce the page loading time.

Create a news article

Use News articles to keep employees updated on company news and announcements.

Before you begin

- Role required: sn_cd.content_manager
- To publish large quantities of news articles, create a Content template before you create news articles. See Create a Content template
- You can assign one or more content categories to the news article so employees can filter news articles by category. See Create a content category.
- Social engagement settings enable employees to view page count, select a reaction icon, or leave a comment. See Content engagement

About this task

The news article content type is built using the Rich Content Editor and published to the employee portal via news widgets. For an overview of News articles, see News articles.

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New**.
3. Select **News Article** under the **Choose a content format** section.
4. Select **Continue**.
5. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating.
Order	The order in which the news article appears in a widget or the news page. A news article with a lesser value appears first. If two articles have the same order value, articles will appear based on the most-recent publish date.
Active	Indicates the content is active and available for use.
Article publish start date and time	The date and time when the article becomes available for viewing on the portal.

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Field	Description
	Note: The article becomes visible to specific users on a set date, based on the publish plan configurations.
Article publish end date and time	The date and time when the article is no longer available for viewing.
Headline	The headline for the news article
Subheadline	The secondary header for the news article
Featured image	The image that will appear in the news article and as a thumbnail in the News feed widget in the Employee Center Pro. We recommend a 4:3 ratio for images.
Article content	Link to assemble the body of the news article in the Rich Content editor. See Microsites
Use a content template (Optional)	Option to use a preconfigured template which provides a content layout and generates a publish plan. See Content templates
Category	Select one or more categories to associate with the news article.
Social engagement settings	If the Content Admin enabled social engagement, the following settings appear in the form to allow employees to engage with the article: ○ Allow comments ○ Allow reactions ○ Show page view count

6. Click **Save and continue** to proceed to publishing the article.
   If you change the Content template after saving the News article, the system deletes the auto-generated publish plans and generates new plans per the newly-selected Content template. You are redirected to the **Publish** tab.

What to do next

- Review how the News article will appear in the Article detail page by clicking **Preview on portal**.

  Note: The content preview does not show how News articles appear in a widget or on mobile.

- Publishing news articles

Create a news article template

Create a news article template to enable content authors to reuse the article layout to rapidly assemble news articles.

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Before you begin

Role required: sn_cd.content_admin or sn_cd.content_template_owner

You can create a reusable article template from scratch or based on an existing news article: Create a news article

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select the news article.
3. From the hamburger menu, select **Clone as reusable article**.



4. Enter a name for the reusable article.
5. Click **Open editor** to edit the layout.
6. Click **Save**.
   The reusable article appears in **Content Publishing** > **Reusable Components** > **Reusable Articles**.

What to do next

Add the reusable article to a new or existing content template: Create a Content template

Publishing news articles

News articles can be published via a publish plan or using Content templates to auto-generate publish plans. These auto-generated publish plans are inactive by default and must be activated for News articles to appear in the portal.

Before you begin

- Role required: sn_cd.content_manager
- Complete the steps to Create a news article

About this task

Content templates

If you selected a Content template when you created the news article, the system generates the publish plans defined in the Content template. You can edit the auto-generated publish plans. The changes you make to publish plans do not impact the Content templates.

Note: If the Content template is edited after the system auto-generated the publish plans, those changes are not reflected in existing publish plans.

Content availability vs Publish plans

Content availability defines when the content is available and the core audience who can access it. These parameters are set at the content item level.

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Publish plans determine how and where content is displayed in widgets. Publish plans specify the widget location, audience visibility (which can expand the audience defined in content availability), and the timeframe for displaying the content.

Note: Publish plans do not override content availability date settings. If a publish plan displays content outside of availability parameters (for example, before it is available), users attempting to access the content will encounter a message such as "Sorry, this isn't available".

To avoid this, content managers must ensure that publish plan duration dates align with the content availability parameters.

Procedure

1. Navigate to the News article that you want to publish.
2. Fill in the fields to define content availability:

Content availability fields

Field	Description
Content can be accessed starting	Determines the date and time when the content is available for viewing.
Content cannot be accessed after	Determines the date and time after which the content is no longer available.
Add audience	Define the users who can view the content.

3. Click **Save availability**.
4. Review the auto-generated publish plans and edit as necessary, such as to change the audience or publishing dates, or create new publish plans: Create a publish plan for your content.

Note: If you edit an auto-generated publish plan, ensure you select the **Active** option.

5. Click **Activate generated plans**.

What to do next

If you edit a news article after publishing it and want to change the publish start date, you must generate new publish plans.

Hide News and Events from the Mega Menu

The News Center menu option appears in the primary navigation menu by default, however, a portal admin can remove it from the menu.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Menus**.
2. Locate the menu used in the Employee Center portal and click the link in the **Updated** column.
3. Scroll to the Related Links table and locate the News Center menu item.

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4. Click in the **Active** column to change the value to `False`.
   The News and Events menu option no longer appears in the primary navigation menu.

Company events

Host live company events directly in the employee portal, with prebuilt configurations to streamline the pre-event communications and handle traffic surges. Content authors can easily create and share event content using the drag-and-drop Rich Content Editor and mass-publishing capabilities.

Create a company event

Use company events to configure a live-streamed event.

Before you begin

- Role required: sn_cd.content_manager
- To create and publish company events with greater efficiency, use a content template. For more information, see Create a Content template.
- You can assign one or more content categories to the company event so employees can filter by category. See Create a content category.
- Social engagement settings enable employees to view page count, select a reaction icon, or leave a comment. See Content engagement.

About this task

The company event content type is built using the Rich Content Editor and published to the employee portal via widgets. For an overview, see Company events.

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New**.
3. Select **Company event** under the **Choose a content format** section.
4. Select **Continue**.
5. Fill in the fields in the **New content** form.

Design

Field	Description
Event content record name	The name that describes the content you are creating.
Order	The order in which the event appears in a widget. An event with a lesser value appears first.
Active	Indicates the content is active and available for use.

Event information

Field	Description
Location	Physical location of the event (if applicable).

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Field	Description
Event start date and time	The date and time when the article becomes available for viewing on the portal. **Note:** The article becomes visible to specific users on a set date, based on the publish plan configurations.
Event end date and time	The date and time when the article is no longer available for viewing.
Optimize performance for high traffic volume	Supports an audience of up to 10,000 viewers.

Content

Field	Description
Headline	The headline for the company event.
Subheadline	The secondary header for the company event.
Featured image	The image that will appear in the company event and as a thumbnail in the News feed widget in the Employee Center Pro. We recommend a 4:3 ratio for images.
Article content	Link to assemble the body of the company event using the Rich Content Editor. See Microsites
Content template (Optional)	Option to use a preconfigured template which provides a content layout and generates a publish plan. See Content templates.
Category	Select one or more categories to associate with the event.
Social engagement settings	If the Content Admin enabled social engagement, the following settings appear in the form to allow employees to engage with the event: ○ Allow comments ○ Allow reactions ○ Show page view count

6. Click **Save and continue** to proceed to publishing the event.
   If you change the Content template after saving the Company event, the system deletes the auto-generated publish plans and generates new plans per the newly-selected Content template.
   You are redirected to the **Publish** tab.

What to do next

- Review how the event will appear in the portal by clicking **Preview on portal**.
- Publish the company event

Publishing company events

Company events can be published via a publish plan or using Content templates to auto-generate publish plans. These auto-generated publish plans are inactive by default and must be activated for company events to appear in the portal.

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Before you begin

- Role required: sn_cd.content_manager
- Complete the steps to Create a company event

About this task

Content templates

If you selected a Content template when you created the company event, the system generates the publish plans defined in the Content template. You can edit the auto-generated publish plans. The changes you make to publish plans do not impact the Content templates.

Note: If the Content template is edited after the system auto-generated the publish plans, those changes are not reflected in existing publish plans.

Content availability vs Publish plans

Content availability defines when the content is available and the core audience who can access it. These parameters are set at the content item level.

Publish plans determine how and where content is displayed in widgets. Publish plans specify the widget location, audience visibility (which can expand the audience defined in content availability), and the timeframe for displaying the content.

Note: Publish plans do not override content availability date settings. If a publish plan displays content outside of availability parameters (for example, before it is available), users attempting to access the content will encounter a message such as "Sorry, this isn't available".

To avoid this, content managers must ensure that publish plan duration dates align with the content availability parameters.

Procedure

1. Navigate to the company event that you want to publish.
2. Fill in the fields to define content availability:

Content availability fields

Field	Description
Content can be accessed starting	Determines the date and time when the content is available for viewing.
Content cannot be accessed after	Determines the date and time after which the content is no longer available.
Add audience	Define the users who can view the content.

3. Click **Save availability**.
4. Review the auto-generated publish plans and edit as necessary, such as to change the audience or publishing dates, or create new publish plans: Create a publish plan for your content.

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Note: If you edit an auto-generated publish plan, ensure you select the **Active** option.

5. Click **Activate generated plans**.

Workplace Service Delivery Integration

Create new reservations and make changes to existing reservations for your company events from the Workplace Service Management portal, which integrates with Employee Center Pro.

Before you begin

- Role required: sn_cd.content_manager

About this task

The workplace service delivery integrates with employee center pro to provide you with an opportunity to create new reservations and modify existing reservations for your company events seamlessly by following a few simple steps.

Note: This integration is for **Company Events** only.

Procedure

1. Navigate to **Workplace Service Management** > **Portal** > **New Reservation.**

   New Reservation

2. Enter the day and time for the event to start and end.

   Note: Make sure to enter future dates (for example: for the current day, make sure to set the day and time for tomorrow 9AM to 11AM).

3. Select **Search** to populate the **Search results** for a list of available buildings for the day and time you selected.

   Make a reservation

4. Select **Next**.

   Note: You will be able to save and make changes to events in the content library.

5. Enter the **Reservation subject**(required field) on the **Reservation details** form.
6. Validate info in the other fields, including who **This reservation is for**, and the building selections.
7. Review the **Reservation summary** and select **Submit reservation**.

   Reservation details and summary

Note: Any **Workplace User** can see the **Reservation details** and **Reservation summary**; however, only a **Content Manager** is able to save the event or make changes to the event in the content library.

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8. Validate that your selections are correct and submit**Reservation**.
   New reservations or reservation changes are successfully executed and reflected within the portal reservation details.

Related topics

Create Company Event with Workplace Service Management

Create a company event

Publishing company events

Create Company Event with Workplace Service Management

Create new company events and make changes to existing company events from the Workplace Service Management portal, which integrates with Employee Center Pro.

Before you begin

- Role required: sn_cd.content_manager

About this task

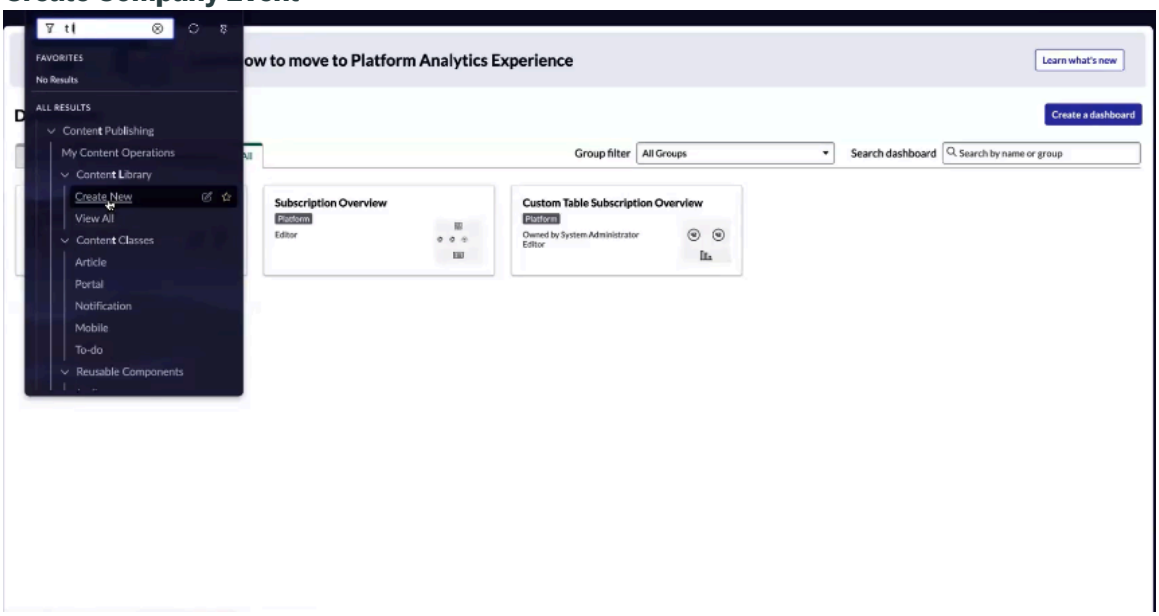
The workplace service delivery integrates with employee center pro to provide you with an opportunity to create and edit company events seamlessly by following a few simple steps.

Note: This integration is for **Company Events** only.

Procedure

1. Navigate to **Workplace Service Management** > **Portal** > **Content publishing** > **Create new.**

Create Company Event



2. Select **Company event** to choose the type of content you want to create.
3. Select **Continue**.

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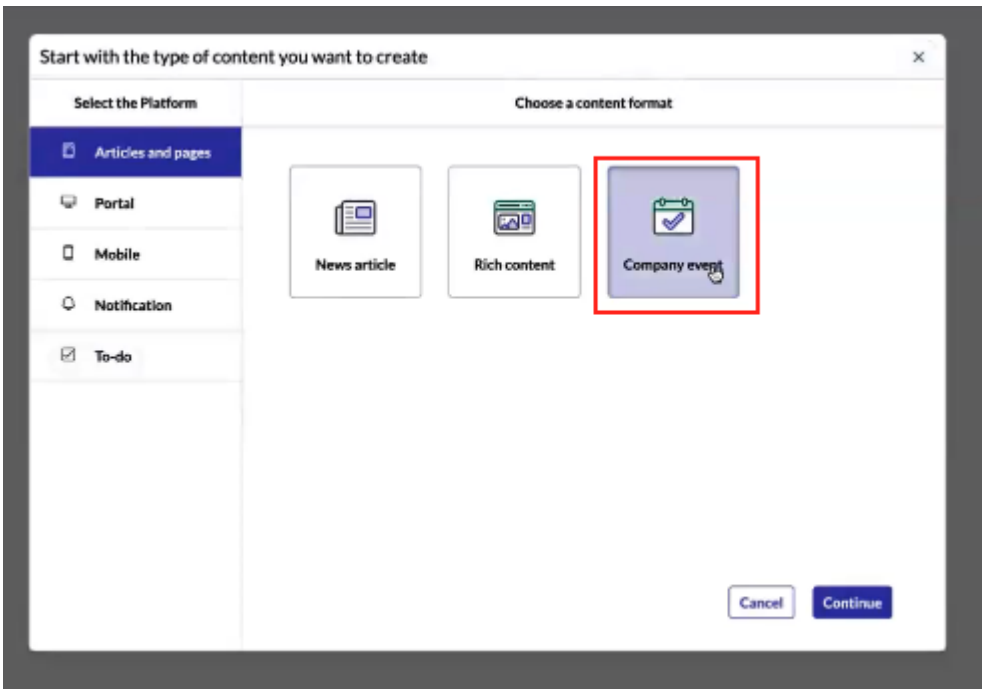
Content Format

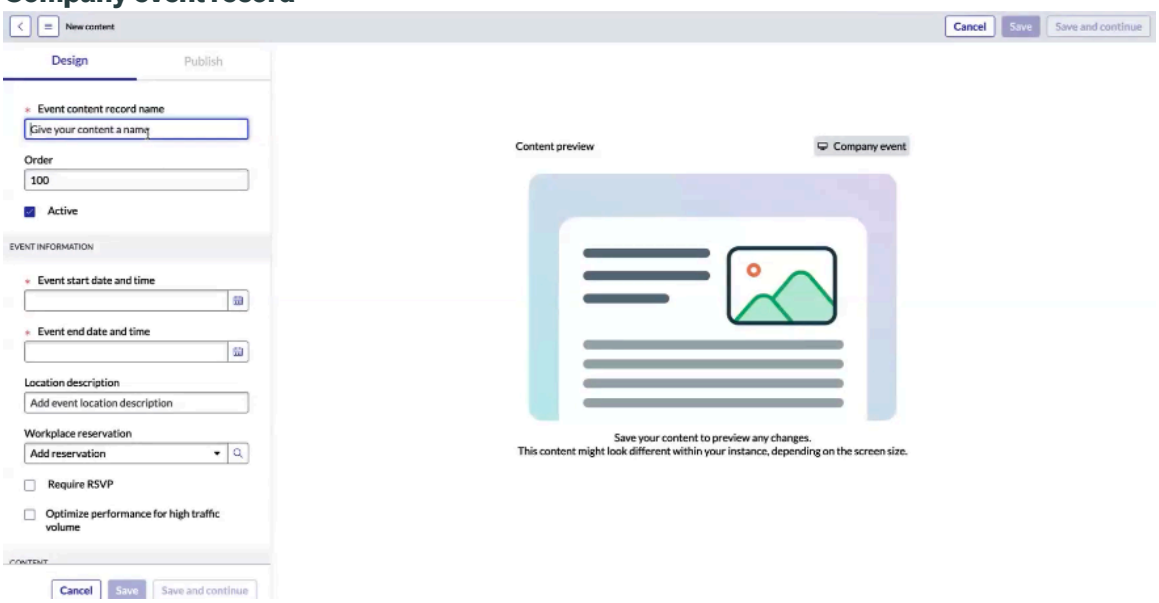


Note: When you fill in the required fields all reservation details will show up in the workplace reservation field on the company event record.

4. Fill in the required fields on the company event record Design tab, which includes the **Event content record name**, **Event start date and time**, and the **Event end date and time**.
5. Select to **Save** or **Save and continue** once you are finished.

Note: The **Publish** tab will allow you to proceed with publishing your event. Content Manager role will be required to publish a company event.

Company event record



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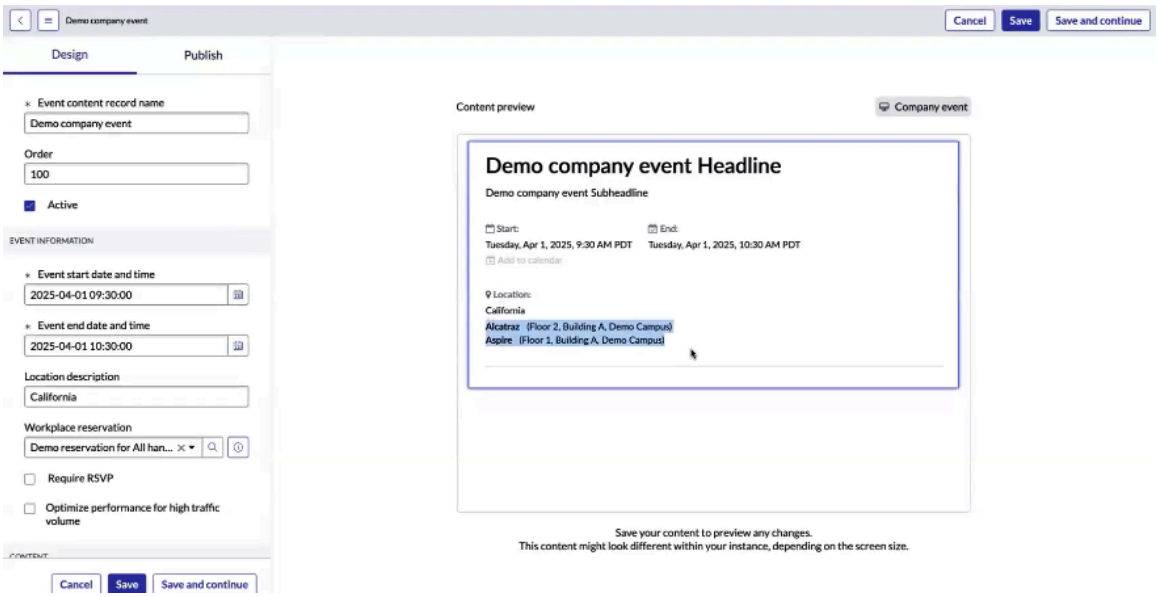
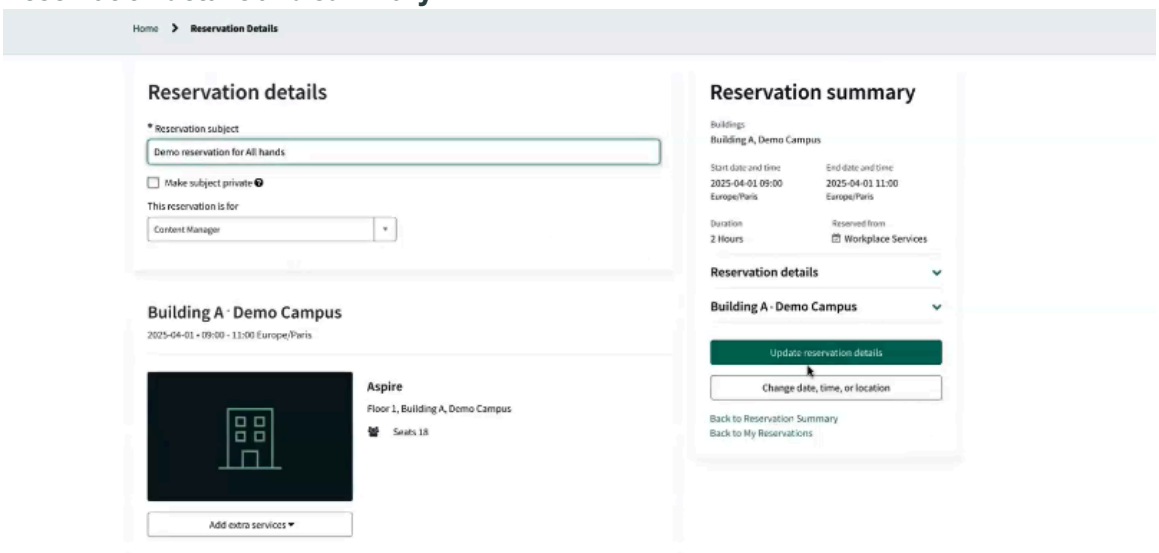
6. Review the content and reservation details in the **Content preview** to ensure everything looks good.
7. Select **Save** or **Save and continue.**

Content Preview



8. Review the **Reservation details** and **Reservation summary**.

Reservation details and summary



9. Make any necessary update and then select Update reservation details.

> **Note:** This will refresh your reservation details to ensure that the updates details are reflected in the portal.You can also remove a reservation, or even add a new reservation, when you want to add additional users or a location that accommodates larger groups.

10. The option to make changes, cancel or share your reservation is available from the **Actions** menu.

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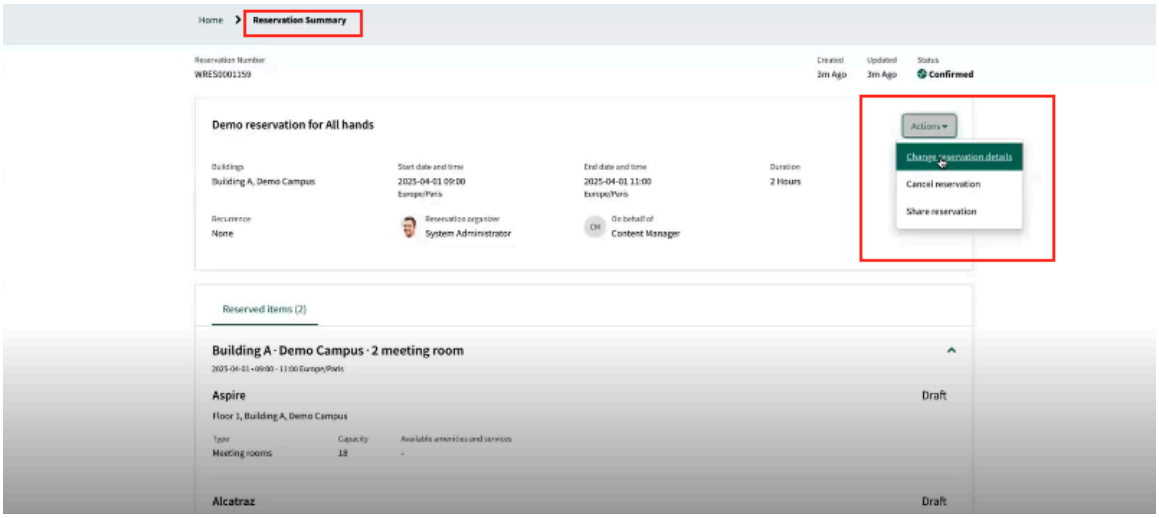
Actions Menu



Note:

When you make changes to your reservations make sure you refresh to ensure that your reservation details are reflected throughout the portal pages.

11. Refresh to validate reservation changes.
Reservation details for company event is updated and published.

Related topics

Create a company event

Publishing company events

Company Event Troubleshooting

Company event troubleshooting steps help resolve reservation changes and cancellations.

Before you begin

- Role required: sn_cd.content_manager

About this task

Provides helpful troubleshooting steps to manage new and existing reservations for your company events.

Note: This integration is for **Company Events** only. Workplace Service Delivery core and Workplace Reservation plugin is required to complete company event reservations.

Procedure

1. Navigate to **Workplace Service Management** > **Portal** > **New Reservation.**

Note: see Workplace Service Delivery Integration for more information on creating new company events, reservations details, and reservation actions.

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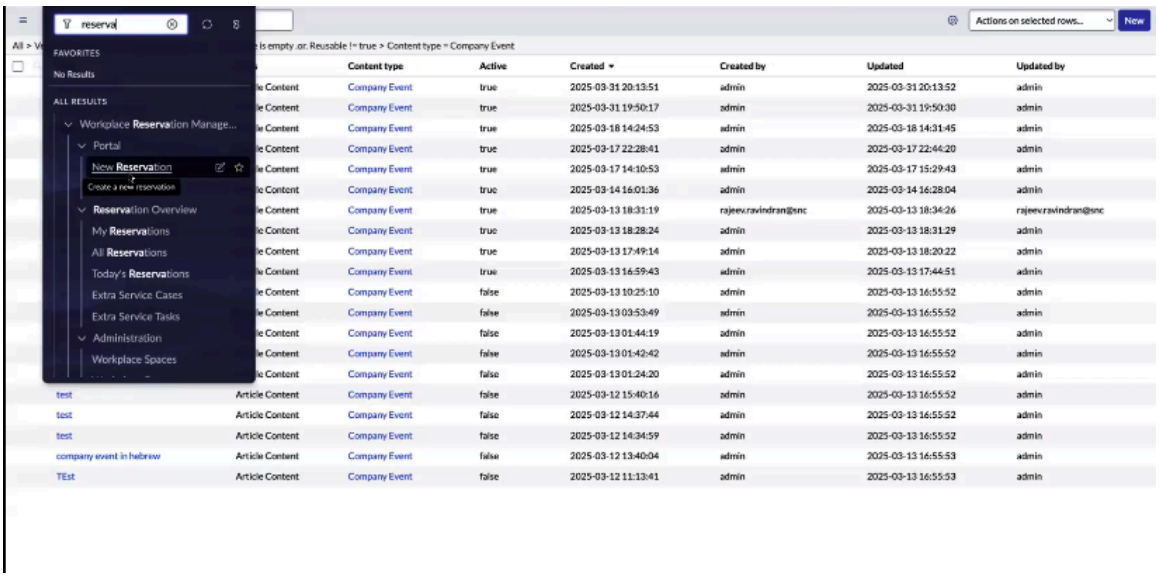
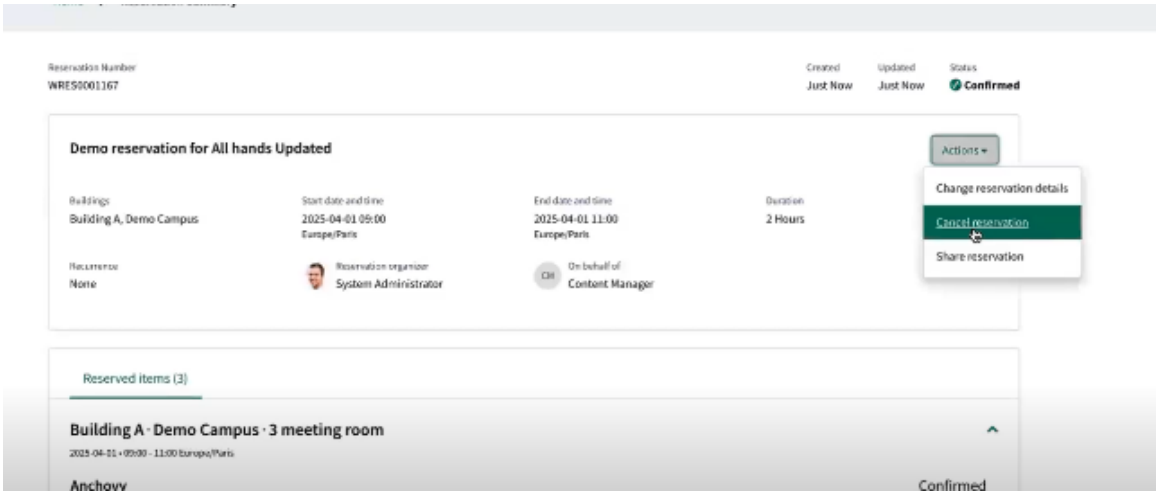
New Reservation



Note: **Content Manager** role is required to create a new company event in the content library.

2. When your reservation is open, select the**Actions** drop-down menu to **Change reservation**, **Cancel reservation**, or **Share reservation**.

Cancel reservation



3. Write **Cancel notes** to describe the reason for canceling the event.
4. Select **Cancel all reservations** to complete the cancellation.

Note: The status of the reservation will update to canceled. The original reservation can still be viewed within the reservation content preview details. However, only the content manager can add reservations, if needed.

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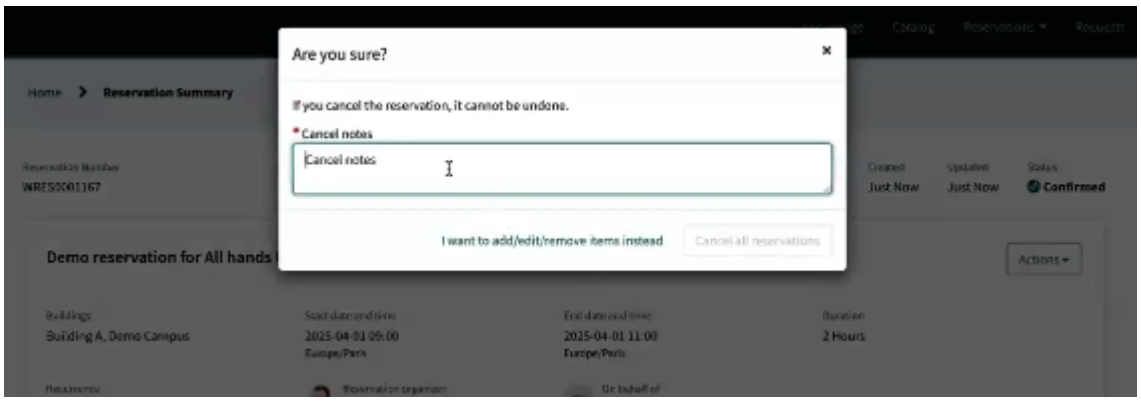
Cancel notes



5. Refresh to validate reservation changes.
   Reservation details for company event is updated based on the **Action** you selected.

Attendee List and RSVP for company events

Attendee list can be viewed for company events.

Before you begin

- Role required: sn_cd.content_manager
- Complete the steps to Create a company event.

About this task

Attendee List

When you create a company event you can **View attendee list** based on the number of attendees you added to the event.

Note: When creating a company event you might have required an RSVP based on your **Attendee limit** by selecting the option for **Require RSVP**. In addition to the RSVP, you can select **Allow waitlist** for the attendees for the event.

Procedure

1. Navigate to the company event that you want to publish.
2. Fill in the fields to define content availability.
3. *Require RSVP* and add an **Attendee limit.**
4. *Allow waitlist*
5. Select **View attendee list**

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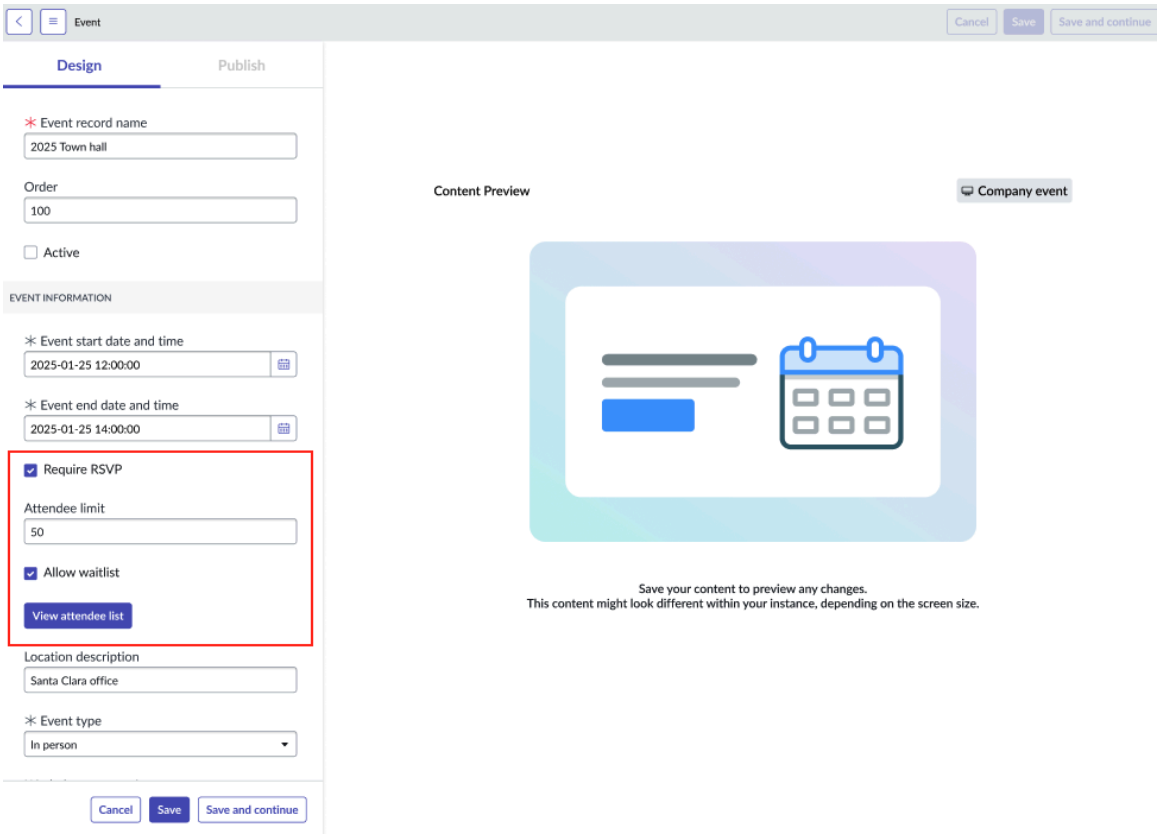
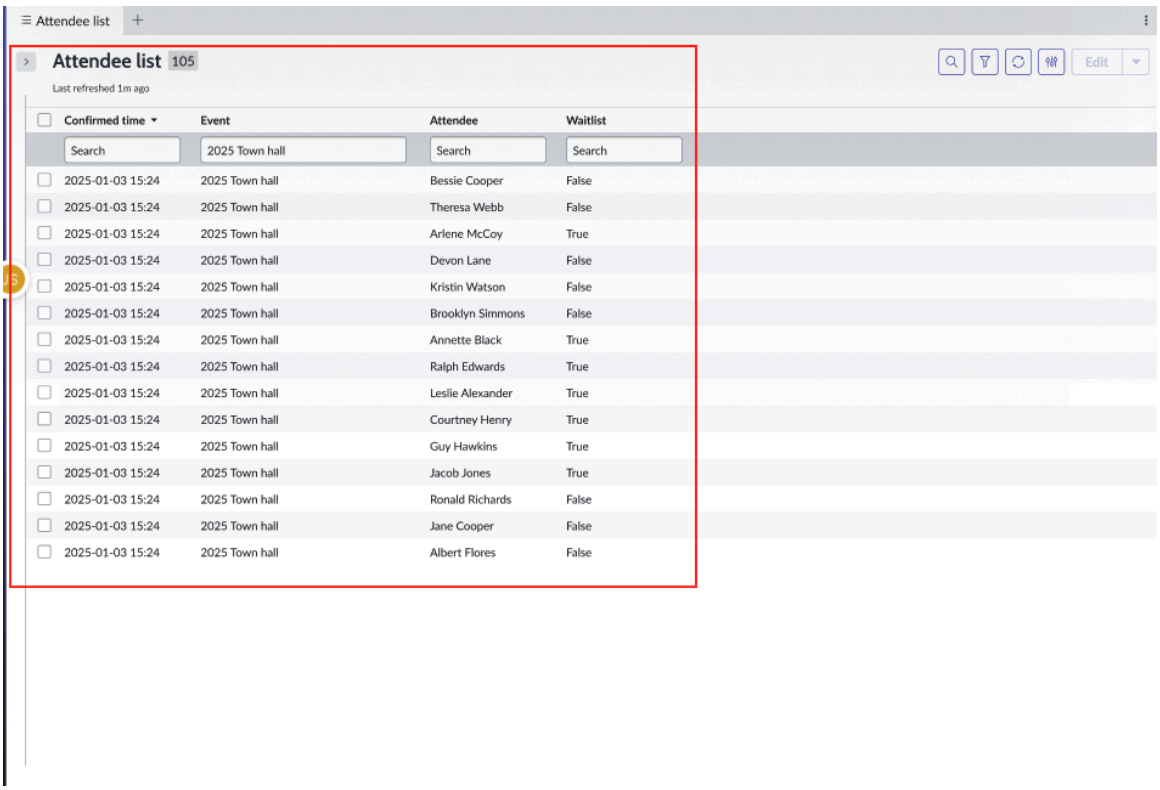
View attendee list



6. View the listed attendees for the event.

Attendee list



7. An email notification is sent when the RSVP is created.

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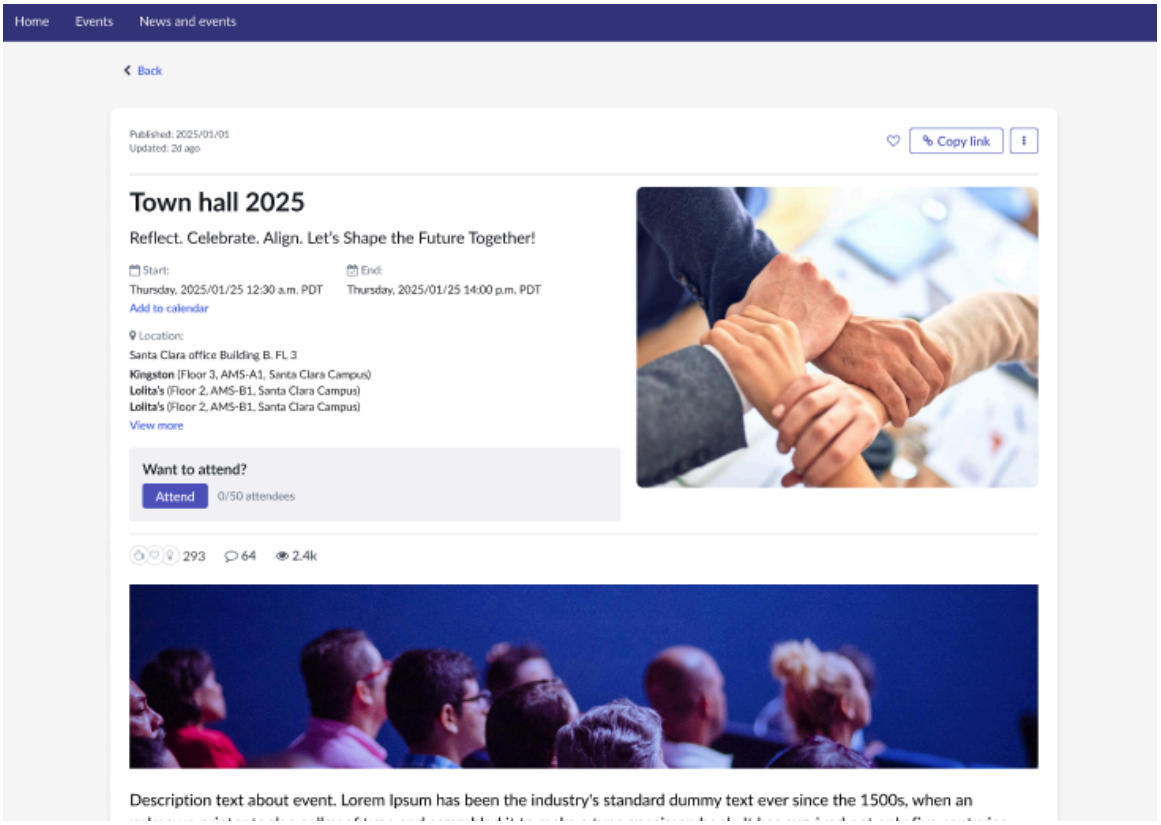
RSVP Overview



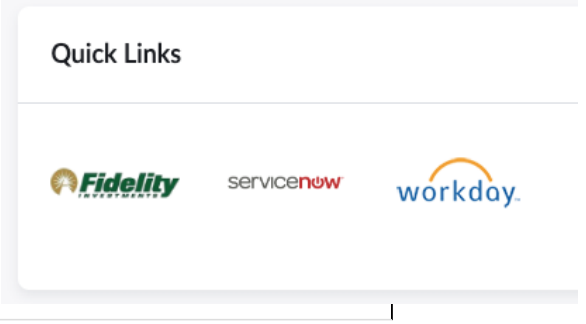
8. After an RSVP has been completed it can be edited, if needed, to indicate whether you will attend or not. Making this change will update the RSVP status.

> **Note:** If an event has reached capacity, you may opt to join the waitlist, and you will be notified should a spot become available. You can also update or remove yourself from the waitlist. An event is closed once the deadline has passed. If the event is full at the RSVP deadline, it will also be marked as closed. After the RSVP deadline, you can only cancel your RSVP and cannot rejoin the event.

Portal content

The Content Library is your one-stop location for creating and publishing a variety of content types to appear on the employee portal.

Content formats with examples

Content format	Description	Example
Image-based link	An picture or graphic that redirects employees to an internal or external web page.	

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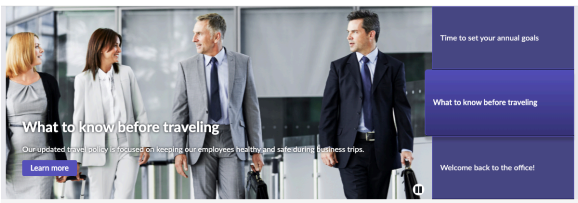
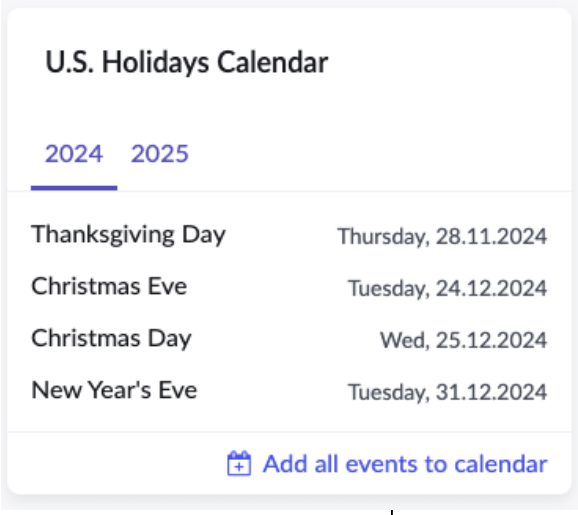
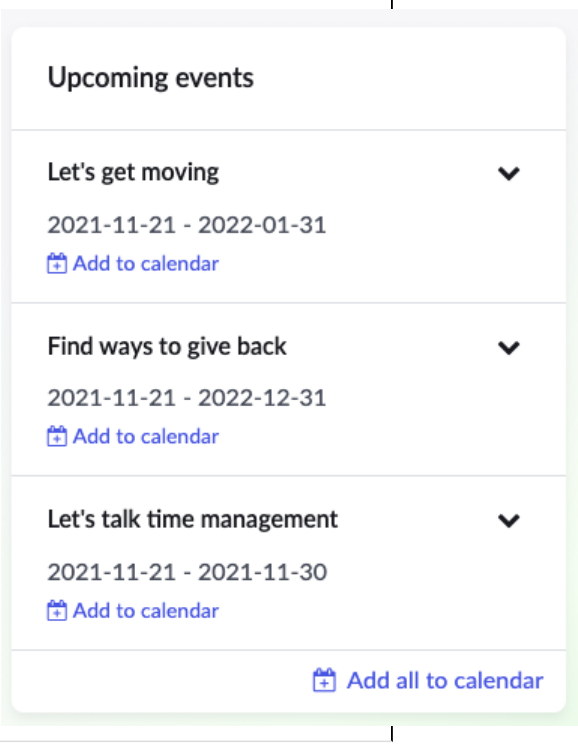
Content formats with examples (continued)

Content format	Description	Example
Banner	An image with text that appears at the top of the portal homepage.	
Calendar	Displays upcoming company holidays. **Note:** Employees can download content as an .ics file to upload to Outlook.	
Event	Provides employees with a quick view of upcoming company events. **Note:** Employees can download content as an .ics file to upload to Outlook.	

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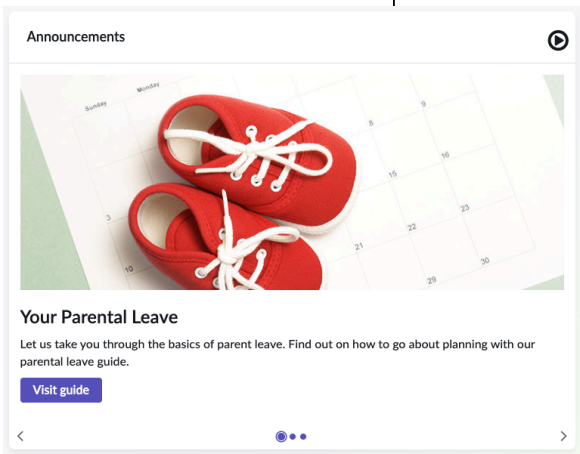
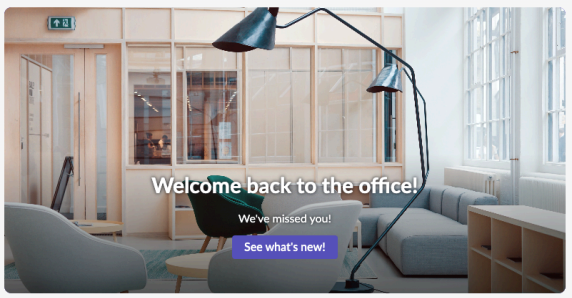
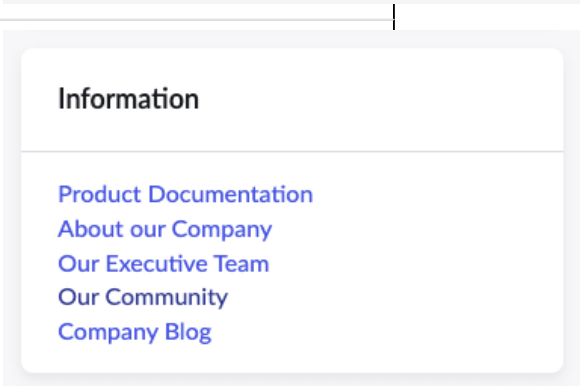
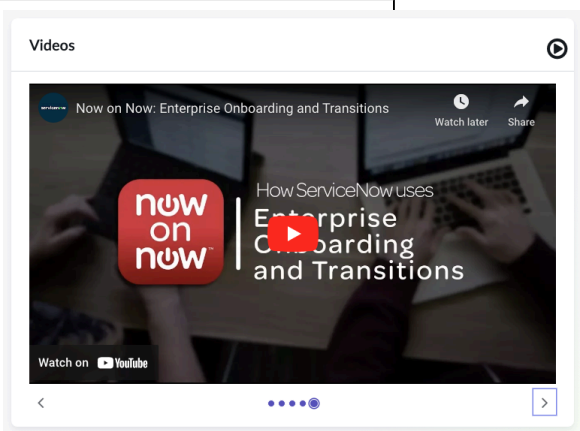
Content formats with examples (continued)

Content format	Description	Example
Rich text	Blocks of formatted text and images.	
Styled content	A banner, video, or block of rich text.	
URL	A text-based link that redirects employees to an internal or external web page.	
Video	Embed a video in the portal.	

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Related topics

- Publishing content
- Creating campaigns

Create customized media with styled content

Create banners, block/announcements, or videos using the styled content type to customize settings such as text color, text alignment, links, background colors, and images on Employee Center Pro.

Before you begin

Role required: sn_cd.content_manager

If you are creating video content, you must first upload the video: Add or modify links to other content sources

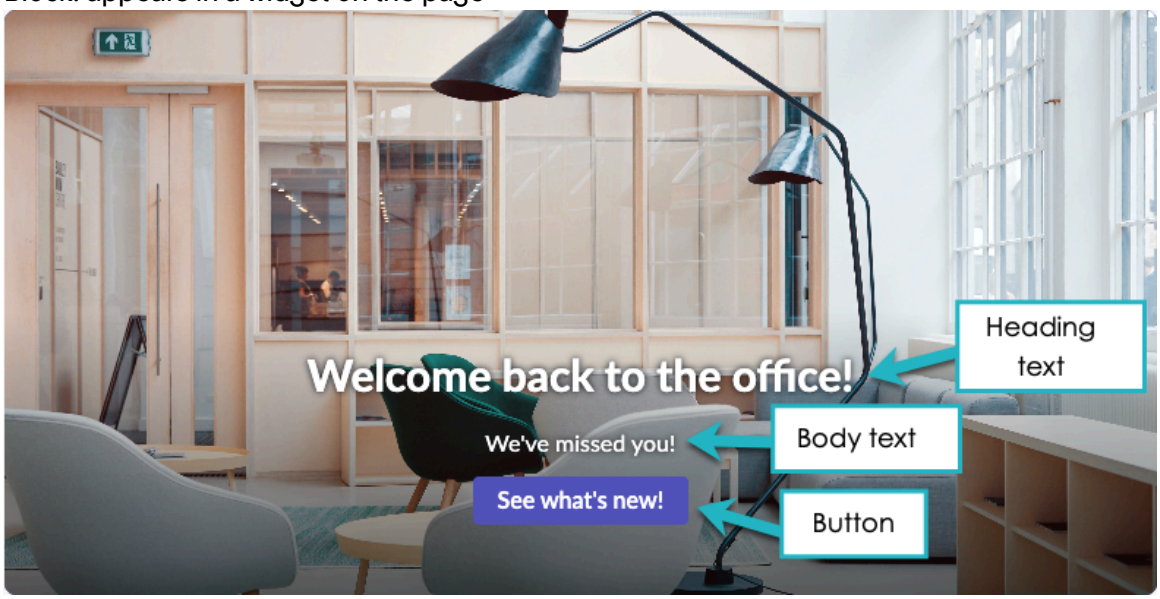
About this task

This content type offers three options:

- Banner: appears at the top of the page



- Block: appears in a widget on the page



- Video: can appear anywhere on a page, including at the top in place of a banner

When creating or editing a banner using styled content, you can view and edit the background image rather than editing your image externally and then importing it.

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The Form Context menu () at the top, left of the form provides the ability to quickly accomplish tasks when creating content. Select the icon and the following choices appear:

- Clone: duplicate the content record.
- Delete: remove the content record and associated scheduled content records.
- View content record: access and view the content record.

Note: You must save the underlying content record before the Form Context menu selections are activated.

Procedure

1. Navigate to **Content Publishing** > **Content Library** > **Create New**.
2. Select **Portal** under the **Select the Platform** column.
3. Select **Styled content** under the **Choose a content format** section.
4. Select **Continue**.
5. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Order	The number that indicates the order in which the portal and styled content appears in the Content list.
Active	Indicates the content is active and available for use.
Content style	Identifies if your content is: ○ Banner ○ Block ○ Video
CONTENT	
User reference table	Determines the variables you can use to personalize text for the block content. Select **HR Profile** to select variables from the sn_hr_core_profile table. **Note:** When the Human Resources Scoped App: Core (com.sn_hr_core) plugin is activated, only **HR Profile** appears. Select **User** to select variables from the sys_user table.
Headline	A title you want to appear for your content.

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Field	Description
	This field is not required if you want your banner to show only a graphic. **Note:** This field only appears when the Content Experience widget is used.
Heading text	Text that provides additional information or clarity to your headline.
Body text	The detailed message you want to appear over the banner.
User column	Together with the HR profile [sn_hr_core_profile] table, filters users when evaluating a condition. This field only appears when you select **HR Profile** from the **User reference table** field.
Text color	Indicates if you want the body text to appear dark or light. **Note:** For the Banner content style, both dark and light are supported. For Block content style, only light is supported if the **Text over background** field is active (green).
Text alignment	Indicates how you want your text to appear. You can select left, center, or right justified.
Icon	Determines if you want an icon to appear. Slide right to choose an icon. Only appears when you select **Block** from **Content style**.
Pick an icon	Select the icon you want to appear. This field only appears when you turn the Icon field to green.
Icon size	Indicates the size of your icon. This field only appears when you turn the Icon field to green. The recommended size for icons are: ○ Topic icon: 56 x 56px ○ Sub-topic icon: 28 x28px
Call to action	Select if you want a button or link to appear.
Button title	The text that appears over the button.

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Field	Description
	This field only appears when you select **Button**.
Button link	The link the user goes to when selecting the button. Select the down arrow to view a list of links. This field only appears when you turn the Icon field to green.
Link title	The text that appears for the link. This field only appears when you select **Link**.
Link	The link the user goes to when selecting the link. Select the down arrow to view a list of links. This field only appears when you select **Link**.
Video link	The link to the video you want to appear on your portal. This field only appears when you select **Video** from **Content style**. **Note:** Only YouTube and Vimeo videos are supported at this time. Ensure you use the embedded video link.
BACKGROUND	
Background Color	The background color of the banner or block text. To define the color, you can use: ○ Hex color codes **Note:** For a list of hex color codes see Hex color codes. ○ CSS color value and includes keywords, name, RGB decimal, or RGB hex number of the color. **Note:** For more information, see HTML Color Names (W3CSchools).
Background image	Indicates that you want an image to appear as the background. Slide right to display additional image fields.
Image file [Upload an image]	Select the link to add an image. This field only appears when you activate **Background image**.

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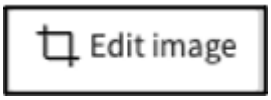
Field	Description
	The recommended size for banners are: ○ Home page banner: 1440 x 400px ○ Topic page: 1258 x 300px
	Allows you to edit your background image within the Content Library module. This field only appears after you upload a background image. A crop box appears over the image in the Image Editor Mode form. You can use the crop box by dragging the edges in or out to indicate what part of your image you want to display. After opening the image editor, the default mode is crop. When you upload and edit a .svg file, it is saved as a .png file. **Note:** .gif files are not supported. The following icons and buttons appear to help edit your image: Each icon allows you to edit the image you imported: ○ Reset to original  ▪ Activates after you make edits to your image. ▪ Select and the **Reset to original?** pop-up appears. Select the **Reset image** button to back out any edits you made to your image. **Note:** After you select **Save**, you can no longer reset your image. You must upload the image again if you are not satisfied with your edits. ▪ If you do not want to keep your edits, select **Cancel**. ○ Move image mode 

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Field	Description
	▪ Select your image in any place outside of the crop box and with your mouse, move your image. ▪ Use the points to resize the image. ▪ Press and hold your mouse to move the crop box. ○ Crop image mode  ▪ Select and your cursor is set to crop. ▪ Create a new crop box by holding and dragging your cursor. ▪ Hold and press your mouse to move the crop box. ▪ Resize the crop box using the points. ○ Zoom in  ▪ Click to make the image larger and closer. ▪ Continue clicking to incrementally zoom in on the image. ○ Zoom out  ▪ Click to make the image smaller and farther away. ▪ Continue clicking to incrementally zoom out on the image. ○ Move left 10 pixels  ▪ Click to move the image to the left by 10 pixels. ▪ Continue clicking to move the image to the left in 10 pixel increments. ○ Move right 10 pixels  ▪ Click to move the image to the right by 10 pixels. ▪ Continue clicking to move the image to the right in 10 pixel increments. ○ Move up 10 pixels  ▪ Click to move the image up by 10 pixels. ▪ Continue clicking to move the image up in 10 pixel increments. ○ Move down 10 pixels 

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Field	Description
	▪ Click to move the image down. ▪ Continue clicking to move the image down in 10 pixel increments. ○ Rotate left 45 degrees  ▪ Click to rotate the image 45 degrees counter clockwise. ▪ Continue clicking to rotate the image counter clockwise in 45 degree increments. ○ Rotate right 45 degrees  ▪ Click to rotate the image 45 degrees clockwise. ▪ Continue clicking to rotate the image clockwise in 45 degree increments. ○ Crop-short rectangle  ▪ Click to change the crop tool to a short rectangle shape. ▪ Use the square points of the rectangle to further crop your image. ○ Crop-tall rectangle  ▪ Click to change the crop tool to a tall rectangle shape. ▪ Use the square points of the rectangle to further crop your image. ○ Crop-square  ▪ Click to change the crop tool to a square shape. ▪ Use the square points of the square to further crop your image. ○ Custom  ▪ Click to display the **Detail Editing** pop-up. ▪ You can define the size of the crop tool and the size of your image by pixels. ▪ You can also specify the angle you want your image rotated. ○ Preview  ▪ Select to display a preview of your edited image. ▪ Enter location information similar to when you publish your content. This allows you

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Field	Description
	to view your image where you want it to appear. For information on the fields, see Create a publish plan for your content. ○ Cancel and Save ▪ Select **Cancel** to exit editing your image and not save your changes. ▪ Select **Save** to save the edits you made to your image. You can select **Crop and continue** to continue editing. **Note:** After you select the **Save and continue** your edits are saved and you cannot back out your edits.
Image size	How you want the image to appear. ○ Fill width: Resize the image to cover the entire container, even if the image must be stretched or cut off on the edges. ○ Fit width: Resize the image to ensure it is entirely visible. ○ Original size: Use the original size of the image. This field only appears when you activate **Background image**.
Image position	The location you want your image to appear. Select a box to define the image position. This field only appears when you activate **Background image**.
Text over background	Indicates that you want the text to appear over the background image. If you leave unchecked, the text appears below the image. Slide right to select a gradient for your background.
Add gradient	Indicates that you want the text to include color gradient to make your text easier to read. Only appears when you activate the **Text over background** field.

6. Select **Save** to save the record and remain on the **Design** tab.
7. Or, select **Save and continue** to save the record and move to the **Publish** tab.

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What to do next

- (Optional) Translate your content.

  Request language translation for your content. For more information, see Multilingual support in the Content Library.

  Note: Only translate content after you are done modifying the content. For best results, we do not recommend that you add or remove components or change the formatting after translation.

  To create rich content that is formatted differently in different languages, duplicate the content and modify the formatting as needed. Then, use Audiences to target the content to users by language. See Audiences

- Preview your content from the **Publish** tab.

  Note: Content Preview is designed to provide a general idea of how your content looks. Content may look different once published due to variations in device resolution, theme difference, or mobile app style configuration.

- Configure a publish plan to control where the content is delivered, the audience, and the period of time it is available: Create a publish plan for your content.

Create video content

Using the Content Library, you can create video content to appear on the employee portal.

Before you begin

Role required: sn_cd.content_manager

To add features to your video link like heading text, body text, text color, background color, and background image, use Portal Styled content from the **Content Library**. For more information, see Create customized media with styled content.

About this task

The Content Library supports the following types of video:

- HTML5

  Note: Hover text or tooltips are not supported for HTML5 at this time.

- YouTube
- Vimeo

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Portal** under the **Select the Platform** column.
4. Select **Video** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **New content** form.

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Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Active	Indicates the content is active and available for use.
Video URL	The link to the video you want to appear as content. Only YouTube and Vimeo videos are supported at this time. Ensure you use the embedded video link. Select the Lookup using list icon ( ) to view a list of link content. This list matches the content you can select when selecting the down arrow key ( ). You can also select the Preview this record icon ( ) to view the link content record. **Note:** Depending on your configurations or extensions, your link may open in a new window.

7. Select **Save** to save the record and remain on the **Design** tab.
8. Or, select **Save and continue** to save the record and move to the **Publish** tab.

To switch languages or translate your content, select the **Language settings** drop-down at the top, right side.

To switch languages and have the fields on the form appear in a different language, select the **Switch language** button, at the top. This button only appears when the sn_cd.enable_language_switching system property is activated. This is similar to changing your language at login. For more information, see Properties installed with Content Publishing.

To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

For information on publishing your content, see Create a publish plan for your content.

Content Governance

When portal content is requested from Content Governance, the **Content Request Items** related list tab appears. Select the content request item to view information about the request. For more information, see Edit a content request item.

When the **Content Request Item** has a state of **Work in Progress**, the **Send for Review** button appears.

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The content is sent to the **Opened by** or content requester person for review.

> **Note:** To edit the content after a review, the content request item state must be changed to **Work in Progress**.

Create URL content

Using the Content Library, you can create URL content containing a link to information.

Before you begin

Role required: sn_cd.content_manager

Define the link: Add or modify links to other content sources

Procedure

1. Navigate to **Content Publishing** > **Content Library** > **New**.
2. Select **Portal** under the **Select the Platform** column.
3. Select **URL** under the **Choose a content format** section.
4. Select **Continue**.
5. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Active	Indicates the content is active and available for use.
Link	The URL link to content you want to appear for your employees. Select the Lookup using list icon ( ) to view a list of link content. This list matches the content you can select when selecting the down arrow key ( ). **Note:** Depending on your configurations or extensions, your link may open in a new window.

6. Select **Save** to save the record and remain on the **Design** tab.
7. Or, select **Save and continue** to save the record and move to the **Publish** tab.
   For information on publishing your content, see Create a publish plan for your content.

   To switch languages or translate your content, select the **Language settings** drop-down at the top, right side.

   To switch languages and have the fields on the form appear in a different language, select the **Switch language** button, at the top. This button only appears when the sn_cd.enable_language_switching system property is activated. This is similar to changing your language at login. For more information, see Properties installed with Content Publishing.

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To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

Content Governance

When portal content is requested from Content Governance, the **Content Request Items** related list tab appears. Select the content request item to view information about the request. For more information, see Edit a content request item.

When the **Content Request Item** has a state of **Work in Progress**, the **Send for Review** button appears.

The content is sent to the **Opened by** or content requester person for review.

Note: To edit the content after a review, the content request item state must be changed to **Work in Progress**.

Create image-based link content

Using the Content Library, you can upload a picture or graphic and link it to a url.

Before you begin

Role required: sn_cd.content_manager

Define the link: Add or modify links to other content sources

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Portal** under the **Select the Platform** column.
4. Select **Image-based link** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number.

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Field	Description
	Note: Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.
Active	Indicates the content is active and available for use.
Link	The URL link to content you want to appear on the Employee Center or Employee Center Pro. Select the Lookup using list icon () to view a list of link content. **Note:** Depending on your configurations or extensions, your link may open in a new window.
Image Click to add an image	The image the URL is embedded in. Select the **Click to add an image** link to add an image.

7. Select **Save** to save the record and remain on the **Design** tab.
8. Or, select **Save and continue** to save the record and move to the **Publish** tab.
   For information on publishing your content, see Create a publish plan for your content.

   To switch languages or translate your content, select the **Language settings** drop-down at the top, right side.

   To switch languages and have the fields on the form appear in a different language, select the **Switch language** button, at the top. This button only appears when the sn_cd.enable_language_switching system property is activated. This is similar to changing your language at login. For more information, see Properties installed with Content Publishing.

   To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

   Content Governance

   When portal content is requested from Content Governance, the **Content Request Items** related list tab appears. Select the content request item to view information about the request. For more information, see Edit a content request item.

   When the **Content Request Item** has a state of **Work in Progress**, the **Send for Review** button appears.

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The content is sent to the **Opened by** or content requester person for review.

Note: To edit the content after a review, the content request item state must be changed to **Work in Progress**.

Create events content

Using Content Library, you can create content that announce events to your employees.

Before you begin

Role required: sn_cd.content_manager, sn_cd.content_admin

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Portal** under the **Select the Platform** column.
4. Select **Events** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number. **Note:** Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.
Active	Indicates the content is active and available for use.
Content	
Event start	The date and time the event begins.
Event end	The date and time the event ends.

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Field	Description
User reference table	Determines the variables you can use to personalize text for the block content. Select **HR Profile** to select variables from the sn_hr_core_profile table. **Note:** When the Human Resources Scoped App: Core (com.sn_hr_core) plugin is activated, only **HR Profile** appears. Select **User** to select variables from the sys_user table.
Rich text	Message for your event. Use the editing tools to format your text. Based on the table you select from the **User reference table** drop-down, you can customize your messages using variables from the table. For example, when **User** is selected from the **User reference table** drop-down, a list of variables appears in the **Fields** field. You can place a variable like **First name** so the message displays the user's first name and you don't have to add it manually.
Fields	Variables that customize the rich text of the event. The table you select from the **User reference table** drop-down determines what variables are available.

7. Select **Save** to save the record and remain on the **Design** tab.
8. Or, select **Save and continue** to save the record and move to the **Publish** tab.
   For information on publishing your content, see Create a publish plan for your content.

   To switch languages or translate your content, select the **Language settings** drop-down at the top, right side.

   To switch languages and have the fields on the form appear in a different language, select the **Switch language** button, at the top. This button only appears when the sn_cd.enable_language_switching system property is activated. This is similar to changing your language at login. For more information, see Properties installed with Content Publishing.

   To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

   Content Governance

   When portal content is requested from Content Governance, the **Content Request Items** related list tab appears. Select the content request item to view

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information about the request. For more information, see Edit a content request item.

When the **Content Request Item** has a state of **Work in Progress**, the **Send for Review** button appears.

The content is sent to the **Opened by** or content requester person for review.

Note: To edit the content after a review, the content request item state must be changed to **Work in Progress**.

Create banner content

Using the Content Library, you can create banner content that appears on the employee portal.

Before you begin

Role required: sn_cd.content_manager

About this task

Banner content appears at the top of the home page to display announcements and redirect users to a portal page or external link. A banner is comprised of a headline, heading, body text, and an optional button.



Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Portal** under the **Select the Platform** column.
4. Select **Banner** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Active	Indicates the content is active and available for use.
User reference table	Determines which table provides the variables you can use to personalize text for employees. Selecting **User** allows you to insert variables from the sys_user table

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Field	Description
	to the Headline, Heading text, or Body text. The available variables depend on the user record, which is configured at the platform level. Since the banner design form does not display a list of available variables, you can create a rich text content item, to view all available variables from the sys_user table. **Note:** When the Human Resources Scoped App: Core (com.sn_hr_core) plugin is activated, only **HR Profile** appears. Select **HR Profile** to use variables from the sn_hr_core_profile table.
User column	Together with the HR profile [sn_hr_core_profile] table, filters users when evaluating a condition. Only appears when you select the **HR Profile** from the **User reference table** field.
Headline	A title you want to appear for your content. This field is not required if you want your banner to show only a graphic.
Heading text	The headline you want to appear over the banner. Limit is 80 characters. You can use variables to customize the message for the reader. For example, insert `${name}` to display the employee's full name.
Body text	The detailed message you want to appear over the banner. You can use variables to customize the message for the reader.
Primary button	Use to display a button with a link to different content from your banner. Displays the **Button title** and **Button link** fields.
Button title	Text that labels the button or prompts the user to click. Only appears when the **Primary button** is switched to green.

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Field	Description
Button link	A link to content that provides access after selecting the button. Only appears when the **Primary button** is switched to green. **Note:** Select the Lookup using list icon () to view a list of link content. This list matches the content you can select when selecting the down arrow key (). You can also select the Preview this record icon () to view the link content record.
Background image Click to add an image	Link to add a background image to your banner. The recommended size for banners are: ○ Home page banner: 1440 x 400px ○ Topic page: 1258 x 300px

7. Select **Save** to save the record and remain on the **Design** tab.
8. Or, select **Save and continue** to save the record and move to the **Publish** tab.
   For information on publishing your content, see Create a publish plan for your content.

   To switch languages or translate your content, select the **Language settings** drop-down at the top, right side.

   To switch languages and have the fields on the form appear in a different language, select the **Switch language** button, at the top. This button only appears when the sn_cd.enable_language_switching system property is activated. This is similar to changing your language at login. For more information, see Properties installed with Content Publishing.

   To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing and Configure Localization Framework for Content Publishing.

   Content Governance

   When portal content is requested from Content Governance, the **Content Request Items** related list tab appears. Select the content request item to view information about the request. For more information, see Edit a content request item.

   When the **Content Request Item** has a state of **Work in Progress**, the **Send for Review** button appears.

   The content is sent to the **Opened by** or content requester person for review.

   Note: To edit the content after a review, the content request item state must be changed to **Work in Progress**.

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Create rich text content

Using the Content Library, you can create rich text content, which enables you to format your text in a creative and attention-grabbing way.

Before you begin

Role required: sn_cd.content_manager

Rich text can be built using reusable block content. For more information, see Add or modify block content.

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Portal** under the **Select the Platform** column.
4. Select **Rich text** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **New content** form.

Design

Field	Description
Content name	The name that describes the content you are creating or editing.
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number. **Note:** Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.
Active	Indicates the content is active and available for use.
Use block content	You can create rich text or use block content for portal content. Select the toggle switch to show the Block content field.

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Field	Description
Block content	The block content you want to appear on the Employee Center. Only appears when you select the **Use block content** toggle switch. Select the Lookup using list icon () to view a list of link content.
User reference table	Determines the variables you can use to personalize text for the **Rich text** field. Appears when the **Use block content** is turned off. Select **HR Profile** to select variables from the sn_hr_core_profile table. **Note:** When the Human Resources Scoped App: Core (com.sn_hr_core) plugin is activated, only **HR Profile** appears. Select **User** to select variables from the sys_user table.
User column	Together with the HR profile [sn_hr_core_profile] table, filters users when evaluating a condition. Only appears when you select the **HR Profile** from the **User reference table** field.
Rich text	Message you want to appear as portal content. Use the editing tools to format your text. **Note:** When translating rich text, the HTML sanitizer can remove HTML formatting to protect against security concerns. For more information, see HTML sanitizer.

7. Select **Save** to save the record and remain on the **Design** tab.
8. Or, select **Save and continue** to save the record and move to the **Publish** tab.
   For information on publishing your content, see Create a publish plan for your content.

   To switch languages or translate your content, select the **Language settings** drop-down at the top, right side.

   To switch languages and have the fields on the form appear in a different language, select the **Switch language** button, at the top. This button only appears when the sn_cd.enable_language_switching system property is activated. This is similar to changing your language at login. For more information, see Properties installed with Content Publishing.

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To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

Content Governance

When portal content is requested from Content Governance, the **Content Request Items** related list tab appears. Select the content request item to view information about the request. For more information, see Edit a content request item.

When the **Content Request Item** has a state of **Work in Progress**, the **Send for Review** button appears.

The content is sent to the **Opened by** or content requester person for review.

Note: To edit the content after a review, the content request item state must be changed to **Work in Progress**.

Create calendar content

Add a calendar to the employee portal to provide employees with a quick way of viewing upcoming company events, such as holidays.

Before you begin

Role required: sn_cd.content_manager

Calender dates are configured in the ServiceNow AI Platform. For more information, see Holidays.

Procedure

1. Navigate to **Content Publishing** > **Content Library** > **Create New**.
2. Select **Portal** under the **Select the Platform** column.
3. Select **Calendar** under the **Choose a content format** section.
4. Select **Continue**.
5. Fill in the fields in the **New content** form.

Design

Field	Description
Title	The name that describes the content you are creating or editing.
Content type	The content type you are creating or editing. Select **Calendar**.
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number.

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Field	Description
	Note: Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.
Active	Indicates the content is active and available for use.
Schedule	The calendar you want to appear on the Employee Center. Select the Lookup using list icon ( ) to view a list of link content.

6. Click **Save**.
   The **Schedule Content** related list displays. For information on publishing your content, see Scheduling the delivery of content.
7. Or select **Submit** to save the record and return to the list of content.

Add or modify links to other content sources

Use link content to create URL or video links. You can use these links on the Employee Center, in a campaign, or in Communities (when Communities is installed).

Before you begin

Role required: sn_cd.content_manager

Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Link Content**.
2. Click New or an existing Link Content.
   For more information on the fields and description, see Link content form.
3. Click **Submit**, **Update**, or **Save**
   If you select **Save**, the **Portal Content** tab appears. To associate portal content to your link, you must first create portal content and associate it via the **Link** field on the **Portal Content** form. For more information, see Create calendar content.

What to do next

Use the Content Library to create content that includes the link and publish it to the portal or mobile app:

- Create URL content
- Create image-based link content
- Create customized media with styled content
- Mobile content

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Note: The option to open links in a new tab is only supported in the Service Portal. In the mobile app and Workspace, links will open in the current window, regardless of the **Load link in** configuration.

Add or modify block content

Create block content as reusable information you can insert into campaigns, notifications, rich-text announcements, or community posts (when community is installed).

Before you begin

Role required: sn_cd.content_manager

Procedure

1. Navigate to **All** > **Content Publishing** > **Re-usable Components** > **Block Content**.
2. Click **New** or on an existing block content record.
3. On the form, fill in the fields.
   For more information on fields and description, see Block content form.
4. Select **Save** or **Submit**.
   If you select **Save**, the **Block Content** form remains displayed and the **Translate content** button appears at the top.

   Note: Personalized Block Content can't be used for notification, community, or to-do content types.

5. To have your content translated into a different language, select **Translate content** to initiate the translation workflow your company has configured.
6. Select the language you want your content translated to from the modal that appears.
   For more information on language translations, see Configure Localization Framework for Content Publishing.

Notification content

Create email, push, and SMS notifications to send messages directly to your employees. Messages can also be sent as part of a campaign.

Getting started

To send email, push, or SMS notifications, perform the following tasks:

- Activate the Notify [com.snc.notify] plugin: Activate Notify
- Ensure that the following system properties are configured:

Notification content system properties

System property	Description
sn_ca.sms_notification.max_events	Determines the maximum number of campaign events to queue per job run for SMS. The default value is 50.
sn_ca.sms_notification.max_users_per_event	Determines the maximum number of users to add per a campaign event for SMS. The default is 1,000.

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System property	Description
sn_cd.sms_notification.max_recipients	Determines the maximum number of users to add per Content Delivery notification for SMS. The default value is 50,000.
sn_cd.sms_notification.max_users_per_event	Determines the maximum number of users to add for a Content Delivery event for SMS. The default value is 1,000.
glide.notify.sms.max_concatenation	Notify supports the concept of SMS concatenation. The maximum length of a single SMS is 160 characters for plaintext or 70 characters for Unicode SMS messages. Up to 10 SMS messages are linked together when the maximum length is reached. This property configures the maximum number of SMS messages that are linked into one large SMS message. If the body length is exceeded the body truncates and a message logs. **Note:** The charges are per SMS, which means that 1600 character SMS is 10 times as expensive as a 160 character SMS. Also, not all providers support SMS concatenation.

- Configure notifications to work with an SMS service provider or configure a Twilio account. See Configure Notify with Twilio.
- Create notification content. See Create email, SMS, or push notification content.
- Map SMS content to a campaign (Content Experiences). See Create a campaign.
- Schedule content (Content Experiences). See Create a campaign, Create content for a campaign, or Create campaign bundles/stages, or Scheduling the delivery of content.
- Run scheduled jobs:
  - Content Experiences: Send SMS Notifications: Responsible for sending SMS notifications for campaigns. Default value is to run every hour.
  - Content Experiences: Update Campaign Audience: Reevaluates the audience for a campaign and removes employees that no longer satisfy the criteria.

    Adds users that match your defined criteria to the campaign. Users show up in the Campaign Targets related list for a campaign.
  - Content Experiences: Add Non-Portal Campaign Content: Creates sn_ca_campaign_item_user_records for sent emails. It does not send the email.
  - Content Publishing: Send SMS notifications: Responsible for sending SMS notifications for Content Delivery. Default value is to run every hour.

For more information, see: Email and SMS notifications, Notify, and Numbers and number groups.

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Create email, SMS, or push notification content

Use Notification Content to send an information blast directly to your employees via email, SMS, or push to their mobile devices. Notifications can be used to direct users to the portal for detailed information.

Before you begin

Role required: sn_cd.content_manager

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Notification** under the **Select the Platform** column.
4. Select **Email** or **Push** under **Choose a content format**.
5. Fill out the new notification content form:

Notification Content

Field	Descriptions
Title	A descriptive title of the notification. The title is not the subject of the notification, although they can be identical.
If you select the **Email** content type, provide the following information: **Note:** You will configure recipients as part of a publish plan or in a campaign. The email will be individually addressed to the first listed user, while the remaining users will be blind copied (BCC).	
From	The email address of the person or organization you want the notification to come from. Use the format `admin@example.com`. **Note:** The system does not support string-type inputs, such as `Administrator<admin@example.com>`.
Reply to	The email address that can accept a reply when you want your audience to be able to respond to the notification. Use the format `admin@example.com`. **Note:** The system does not support string-type inputs, such as `Administrator<admin@example.com>`.
Subject	The subject of the notification, similar to the subject line in an email.
Use block content	You can select reusable block content for your notification message.

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Field	Descriptions
	For more information, see Add or modify block content.
Block content	Click the **Lookup using list** icon to select the block content you want for your notification message. Only appears when you select the **Use block content** check box.
Active	Indicates that the notification is active and available. **Note:** Your content must be active in order to publish it.
Body	The body or message of the notification. When you insert an image, use 1440 x 600 pixels (px) and a file size of 100–500 kilobytes (KB). A file size of 100 KB is optimal. This field only appears when Content type is email. **Note:** Optimize your image. It improves performance on the service portal. Also, use SVG files for optimal quality.
If you select the **Push** content type, provide the following information:	
Description	The message you want to send via push. You are limited to 1600 characters.

6. Select **Submit** or **Update** to save and return to the Notification Content list.
   Go to Schedule Content to define the audience, date, and time your content is available. For more information, see Scheduling the delivery of content. Or, go to Manage Content to add your content to a campaign bundle. For more information, see Create campaign bundles/stages.

   To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

   Note: Integration with Localization Framework is not available for Push or SMS content.

Mobile content

Create different types of content that your employees can view on their mobile devices.

Create mobile banner content

Create banner content that your employees can view on their mobile devices.

Before you begin

Role required: sn_cd.content_manager

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Define the link: Add or modify links to other content sources

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Mobile** under the **Select the Platform** column.
4. Select **Mobile Banner** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **Mobile Content** form.

Mobile Content

Field	Description
Title	Title of the mobile banner.
Content type	The content type you are creating or editing. Select **Mobile Banner**.
Active	Indicates the content is active and available for use.
Image	Image to display for the mobile banner.
Link	Link to use with the mobile banner. The link displays when the user taps anywhere on the banner.
Header text	Text that appears in the header of the banner (max 80 characters).
Text	Text that displays in the body of the banner.
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number. **Note:** Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.

7. Right-click the form header and select **Save**.

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The **Schedule Content** related list displays.

8. Or select **Submit** to save the record and return to the list of content.

What to do next

Make the content available to users: Scheduling the delivery of content.

Alternatively, you can build out a more robust publishing configuration using Creating campaigns

Create mobile text card content

Create text card content that your employees can view on their mobile devices.

Before you begin

Role required: sn_cd.content_manager

Define the link: Add or modify links to other content sources

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Mobile** under the **Select the Platform** column.
4. Select **Mobile Text Card** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **Mobile Content** form.

Mobile Content

Field	Description
Title	Title of the mobile text card.
Content type	he content type you are creating or editing. Select **Mobile Text Card**.
Active	Indicates the content is active and available for use.
Link	Link to use with the mobile text card. The link displays when the user taps anywhere on the text card.
Header text	Text that appears in the header of the text card (max 80 characters).
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number.

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Field	Description
	Note: Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.
Style	Style of the mobile text card: ○ Light ○ Dark

7. Right-click the form header and select **Save**.
   The **Schedule Content** related list displays.
8. Or select **Submit** to save the record and return to the list of content.

What to do next

Make the content available to users: Scheduling the delivery of content.

Alternatively, you can build out a more robust publishing configuration using Creating campaigns

Create or edit mobile video content

Create video content that your employees can view on their mobile devices.

Before you begin

Role required: sn_cd.content_manager

Define the link: Add or modify links to other content sources

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Mobile** under the **Select the Platform** column.
4. Select **Mobile Video** under the **Choose a content format** section.
5. Select **Continue**.
6. Fill in the fields in the **Mobile Content** form.

Mobile Content

Field	Description
Title	Title of the mobile text card.
Content type	he content type you are creating or editing. Select **Mobile Video**.
Active	Indicates the content is active and available for use.

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Field	Description
Link	Link to use with the mobile video. The link displays when the user taps on the area below the video.
Video link	Video to display for the mobile video. **Note:** Only YouTube and Vimeo links are currently supported.
Header text	Text that appears in the header of the mobile video (max 80 characters).
Text	Text to display for the mobile video.
Order	When you have multiple pieces of content that appear in a carousel, you can define the order they appear. Enter a number defining the order the content appears on the service portal or Employee Center. Content appears closer to the beginning of the carousel when assigned a lower number. **Note:** Use increments of 100 when determining the order. This method makes it easier to edit. For example, you numbered your links 1, 2, 3, 4, 5 and wanted to place a new content after 2. You would have to renumber 3, 4, and 5. If you use 100, 200, and 300 and wanted to place content from 100 through 200, you would simply use any number from 101 through 199.

7. Right-click the form header and select **Save**.
   The **Schedule Content** related list displays.
8. Or select **Submit** to save the record and return to the list of content.

What to do next

Make the content available to users: Scheduling the delivery of content.

Alternatively, you can build out a more robust publishing configuration using Creating campaigns

To-do content

You can assign tasks to your employees that prompts them to take action.

The types of to-do content you can create are:

- Button Complete
- E-Signature
- Play Video
- View Link

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For more information on creating to-do content, see To-do content form.

You can also create to-do content that appears in a banner or styled content. For more information, see Creating to-do content.

Creating to-do content

Use Content Publishing to create links between a banner or styled content items and to-dos content items.

The two ways of delivering to-do links are:

- Scheduled Content (Content Publishing)
- Campaigns (Content Experiences)

Create to-do links for your banner or styled content items to make it easier to access. Placing to-do links in a banner or styled content makes it highly visible for high priority to-do tasks.

Process for Content Publishing

To create to-do links for a banner or styled content, do the following:

- Create to-do content: For more information, see Create to-do content.
- Create link content referencing your to-do content: For details, see Add or modify links to other content sources

  Note: Select **To-do** in the **Type** field. And, select the to-do content you created previously from the **To-do content** list.

  .
- Create portal content that references your link content.
- Schedule your content using Content Publishing.
  - Schedule the portal content (banner or styled content).

    Note: Your to-do content automatically schedules when you schedule your portal content (banner or styled content).

  - The to-do scheduled content appears in the **To-do scheduled content** field after you select **Save**. Your to-do content also aligns with the schedule of your portal content.
  - The to-do content is automatically scheduled separately when the link content is scheduled.
  - For more information, see Scheduling the delivery of content.
  - The Content Publishing: Create To-dos scheduled job must run before the content becomes available.

Process for Content Experiences (campaigns)

To create to-do links for a banner or styled content within a campaign, you must first have a campaign with stages and content. For more information, see Creating campaigns. Use the same steps in Content Publishing, but instead of scheduling your content, add it to a campaign stage.

- Create to-do content.
- Create link content referencing your to-do link content.
- Create portal content that references your link content.
- Add your portal content to a stage/bundle as an activity in your campaign.

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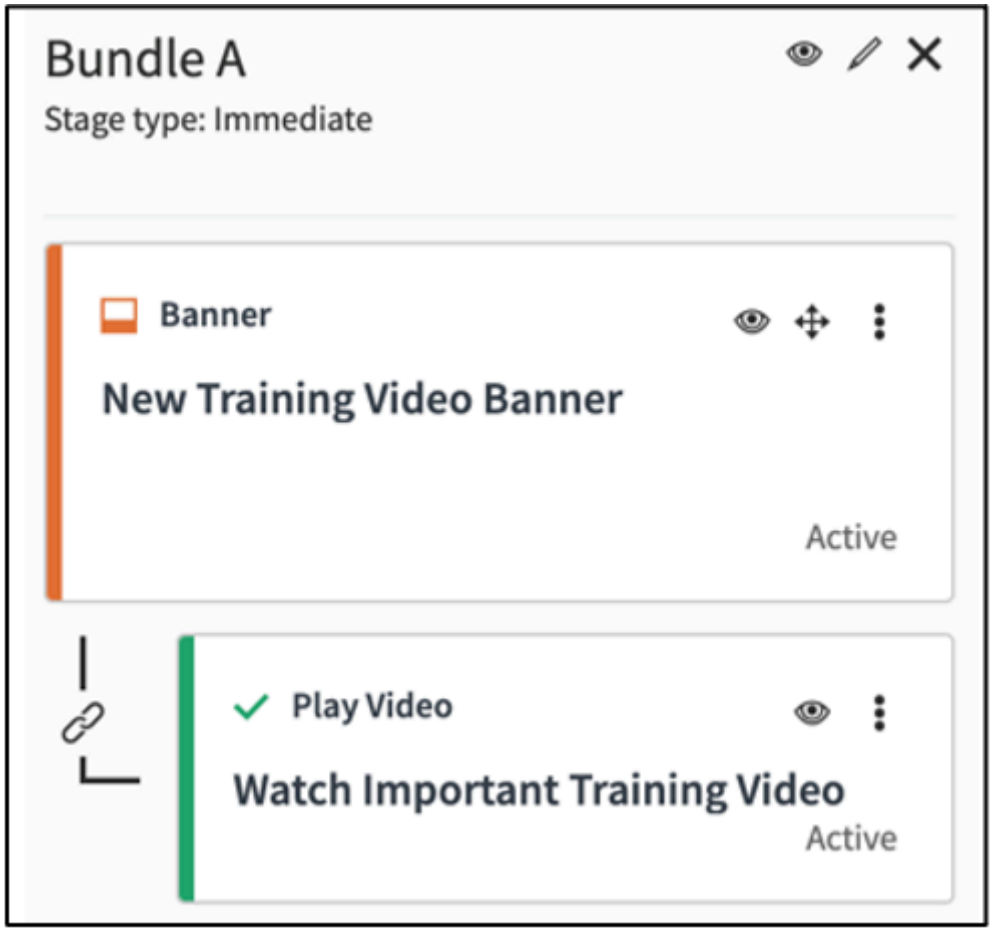
- You can use the legacy lists and forms or the campaign builder UI to add your portal content.
- For more information, see Create a campaign.

- If you use the campaign builder UI, you will see the banner and link content.



- Use Portal preview to view your content. For details, see Campaign preview.
- After verifying your content, publish it.

Note: You cannot delete the link content without deleting the banner (parent) content. You also cannot move the link content to another stage (bundle) without moving the banner (parent) content.

Create to-do content

You can assign tasks to your employees that prompts your employees to take action. You can also have the to-do as part of a campaign or trigger additional content once a task is completed. To-dos can also be sent via email.

Before you begin

Role required: sn_cd.campaign_manager

About this task

For example, an Open Enrollment for Benefits campaign can have tasks that appear as to-dos. These tasks prompt employees to sign up for health care.

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Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **To-do** under the **Select the Platform** column.
4. Select **Button Complete**, **E-Signature**, **Play Video**, or **View Link**.
5. Fill in the form.
   For more information on each field, see To-do content form.
6. Select **Submit** or **Save**.
   The Schedule Content related list appears. For more information on scheduling your content, see Scheduling the delivery of content.

   If you want your to-do content to be a link you can add to a banner or styled content, see Add or modify links to other content sources.

   To request your content to be translated into a different language, select the **Translate content** button at the top. This button only appears when the sn_cd.enable_localization_framework_integration system property is activated. For more information, see Properties installed with Content Publishing.

Pulse survey content

You can create and send Pulse surveys to your employees as a way to receive feedback.

Create pulse survey content

Create pulse surveys that can be delivered to your employees to obtain feedback, drive action, and measure impact.

Before you begin

Role required: sn_lp.creator, sn_cd.content_manager, sn_ca.campaign_manager

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select **New** or existing content.
3. Select **Pulse** under the **Select the Platform** column.
4. Select **Pulse Survey** under the **Choose a content format** column.
5. Select **Continue**.
6. On the form, fill in the fields:

Survey Content form

Field	Description
Title	Suitable name for the pulse content.
Theme	Theme with which you want to associate the pulse content. **Note:** Only the themes of type Group Pulse can be selected in the pulse content.

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Field	Description
Active	Option to indicate that the pulse content is active and available for use.

7. Right-click in the form header and select **Save**.
8. In the **Questions** related list:
   - To add a question to content, click **New**. For more information, see Create a pulse question.
   - To add a question from Question Bank, click **From Question Bank**.

   Add Content (of type Pulse Content) to a campaign in Content Experiences or schedule content in Content Publishing. For more information, see Publishing content.

Create a pulse question

Create a question in a pulse survey or add a question to pulse question bank.

Before you begin

Role required: sn_lp.creator

Procedure

1. Navigate to **Listening Posts** > **Pulse Question Bank**.
2. In the **Questions** related list, click **New**.

   Note: You can also open a pulse survey and directly add questions to the pulse survey by clicking **New**.

3. On the form, fill in the fields:

Pulse Survey Question form

Field	Description
Name	Name of the question.
Question	Description of the question.
Type	Name of the pulse survey.
Rating option	Format in which the rating is provided for questions asked in a pulse survey. For example, Star or Number.
Description	Description to appear when a user points to a question in the pulse survey.
Order	Order in which you want to place the question in the survey. For example, a question with a lesser order is placed first in the survey.
Allow additional information	Option to provide a text box in the survey for the user to enter more details.
Active	Option to indicate that the question is used for assessments and metric calculations.
Mandatory	Option to indicate that the question is mandatory and must be answered by the survey recipient.

4. Click **Submit**.

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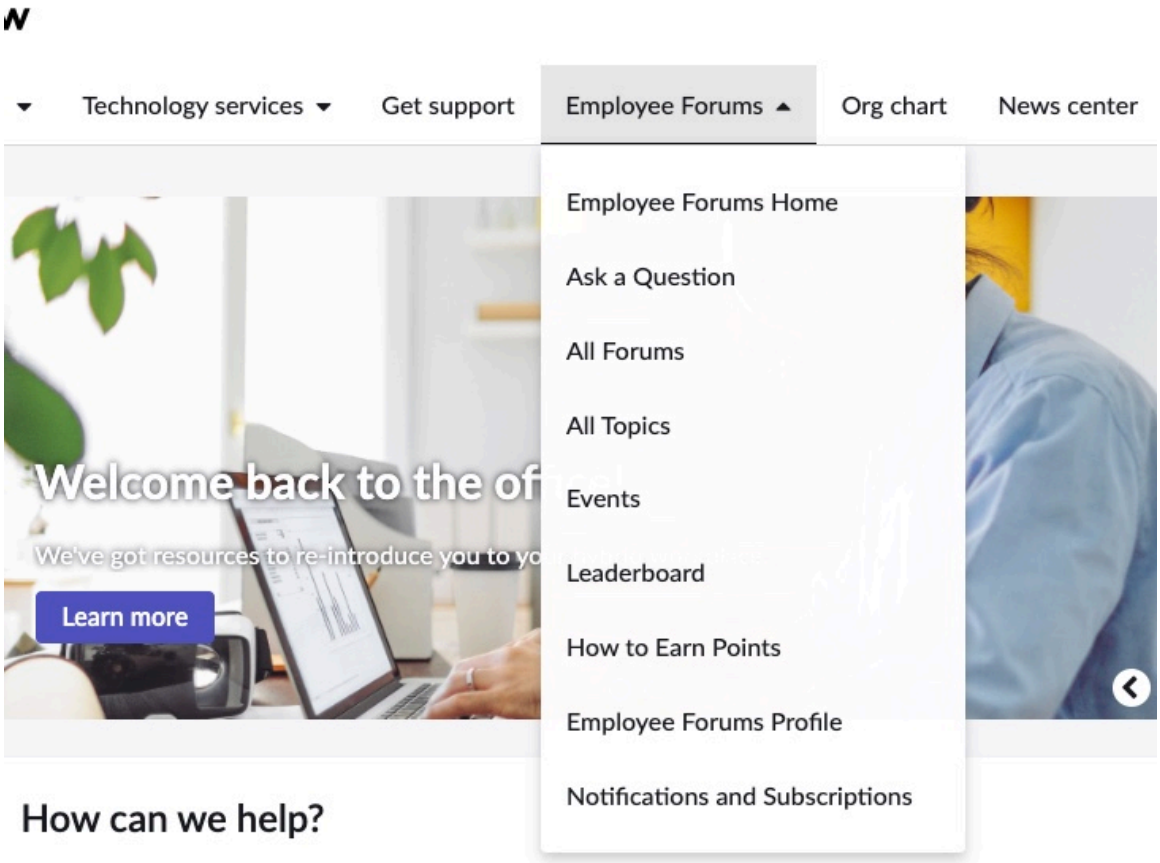
Employee Forums

Employee Forums delivers Communities features to the Employee Center Pro portal to help employees connect, engage, and collaborate with other employees. Use Employee Forums to share business information, promote employee engagement, encourage ideas and feedback, and to give your employees a voice.

Employee Forums enhances employee self-service by providing access to Communities through an out-of-the-box menu item, which takes users to the community where they can post, view, and subscribe to topics.



Employee Forums integrate with campaigns and content publishing so that:

- Content managers can create and schedule content to a forum or topic from Content Publishing.
- Campaign managers can build campaigns that include forum content. Community or forum content can include blog posts, events, videos, or links to posts or other content.

Before content managers can use Employee Forums, an admin must first configure Communities, including forums and topics. These features serve as publishing destinations for managers creating content via Content Publishing. For information on communities, see Communities.

Add or modify forum content

Provide content to your employees through employee forums.

Before you begin

Role required: sn_cd.content_manager

About this task

Creating forum content also requires the following to post to a community or forum:

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- A forum to post community content. For information on creating forums, see Configure community forums.
- The `Content Publishing: Post to Forums` scheduled job runs every hour by default to process posts. For more information on scheduled jobs, see Components installed with Content Publishing.

Note: The Communities (com.sn_communities) plugin must be activated in order to use this feature.

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Library** > **Community**.
2. On the form, fill in the fields.

Community Content form

Field	Description
Title	Title or name that identifies the community post.
Content type	Classification of the community post. Fields used to define the post change based on the content type selection. ○ Community Blog ○ Community Event ○ Community Video ○ Forums Post List (lists posts from a specific forum) **Note:** For more information on community content types, see Community content types.
Active	Indicates that the community post is active and available to post.

Fields change depending on which content type you select.

Community Blog

Community Blog fields

Field	Description
Use block content	Indicates that you are using block content and not rich text. For information on creating block content, see Add or modify block content.
Block content	Appears when you check the **Use block content** box. Click to access existing block content or to create content for your community blog.

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Field	Description
Description	Appears when the **Use block content** box is unchecked. Enter rich text for your community blog.

Community Event if you select **Virtual event**, the fields are different.

Community Event fields

Field	Description
Show attendee list	Indicates that attendees can view a list of other attendees.
Attendee limit	Determines the maximum number of attendees that can attend the event.
Virtual event	Indicates that event is online. When checked, the Event URL, Start time, and End time fields appear.
Event URL	The URL link to the virtual meeting.
Start time	The date and time the virtual event begins.
End time	The date and time the virtual event ends.
Location name	The name or description of the event location.
Street	The street address of the event location.
City	The city of the event location.
Zip / postal code	The zip or postal code of the event location.
Time zone	The time zone of the event location. Used to determine the event scheduling and reminder.
Event reminder	Indicates when you want an event reminder sent.
State / province	The state or province of the event location.
Country	The country of the event location.
Description	A description of the event.

Community Video

Community Video fields

Field	Description
Video	Link to the video you want to post to your community, use as part of a campaign, or post to the Employee Center.

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Field	Description
	Videos appear as web URLs that link to popular video sites. Supported video link hosts are: ○ dailymotion.com ○ facebook.com ○ vimeo.com ○ youtube.com For more information on video content, see Add or modify links to other content sources.
Description	Description of the video.

Forums Post List

Forums Post List fields

Field	Description
List type	How you want the posts from a forum to appear on the Employee Center. ○ Manual List: You decide the order and content links to appear. ○ Dynamic List: Automatically generated list.
Forum links	Determines what forum links you want to appear on the Employee Center. Appears when you select **Manual List** from **List type**. Click the **Unlock forum links** icon and select the links you want to appear. **Note:** The first forum link you select appears first on the Employee Center.
Dynamic list type	The method your posts appear in the forum list. ○ Recently Added: The most recently added forum posts appear. ○ Most Popular: Forum posts that Appears when you select **Dynamic** in **List type**.
Number of list items	The number of forum posts you want to appear. Only appears when you select **Most Popular** from **Dynamic list type**.

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3. Click **Save** to save and remain on the form, or click **Update** to save and return to the Community Content list.

What to do next

- Go to Schedule Content to define the audience, date, and time your content is available. For more information, see Scheduling the delivery of content.

  Note: If you edit published forum content, you must create a new Schedule content record to publish the updates.

- Or, go to Campaign Content to add your content to a campaign bundle. For more information, see Create campaign bundles/stages.

Content versioning

Content versioning tracks changes made to Portal and Rich content types after they are published, enabling managers to view previous versions of content.

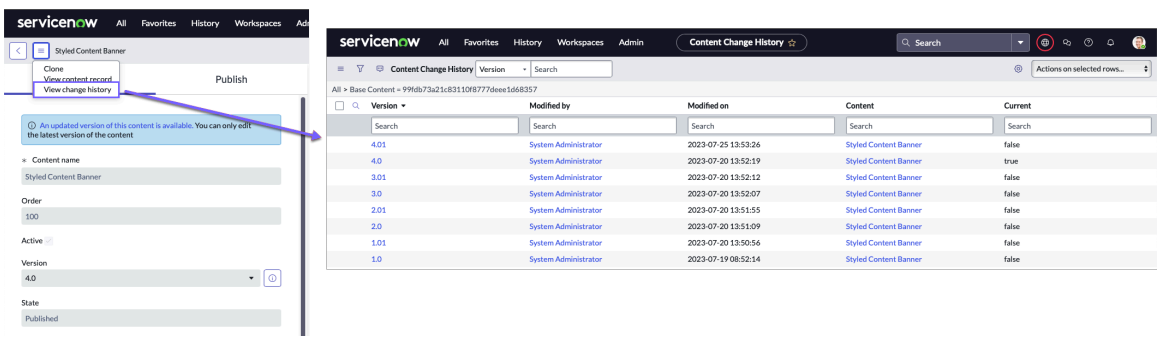
Content versioning tracks changes made to the following content types after they are published:

- Banner
- Calendar
- Events
- Image-based link
- Rich content
- Rich text
- Styled content
- URL
- Video

To edit content once it is published, you must checkout the content, which the system saves as a new version in draft state. Once you publish the new version of the content, the system increments the version number by 1.0.

Note: Content versioning must be enabled in **Content Publishing** > **Advanced** > **Properties**. For more information, see Properties installed with Content Publishing

The following screen shot displays an example of change history, which allows the content admin to view the content in previous versions, identify when were the changes made, and by whom.



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For instructions on how to checkout content for editing, see Checkout published content.

Content versioning and translation

When content versioning is enabled, the **Switch Language** button appears only for the first draft version and published content.

Customers who create content in a non-English language should use of the the following workarounds:

- Turn off Content versioning, then click the **Switch Language** button to enter the content in a non-English language.
- Enter the content in English, then use the **Translate Content** button to initiate the translation workflow.

For more information, see Multilingual support in the Content Library.

Checkout published content

After Portal or Rich content is published, you must checkout the content to modify it.

Before you begin

Role required: sn_cd.content_manager

Note: Content versioning must be enabled in **Content Publishing** > **Advanced** > **Properties**. For more information, see Properties installed with Content Publishing

About this task

For more information on content versioning, see Content versioning.

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Library** > **View All**.
2. Select the content you will edit.
3. Click **Checkout**.
   A new version of the content is created and the **Version** field value is appended with .01.
4. Make the necessary edits.
5. Click **Save** or **Save and continue**.
   This version is saved to the Content Library without impacting the published version of the content.
6. To preview the updated content as it would appear in the portal, based on the current publish plan:
   a. Click the **Publish** tab.
   b. Click the publish plan to preview.
   c. Click **Preview on portal**.
      The Employee Center opens in a new tab, displaying the updated content as it would appear once published.
7. When you are ready to publish your updates, click **Save and publish**.

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This version replaces the currently-published version. The new version maintains the same publish plans as the previous version.

The **Version** field value increments by 1.0.

What to do next

After publishing the updated content, you can create additional publish plans: Create a publish plan for your content

Publishing content

Use Content Publishing to create, schedule, and deliver your portal content to your employees.

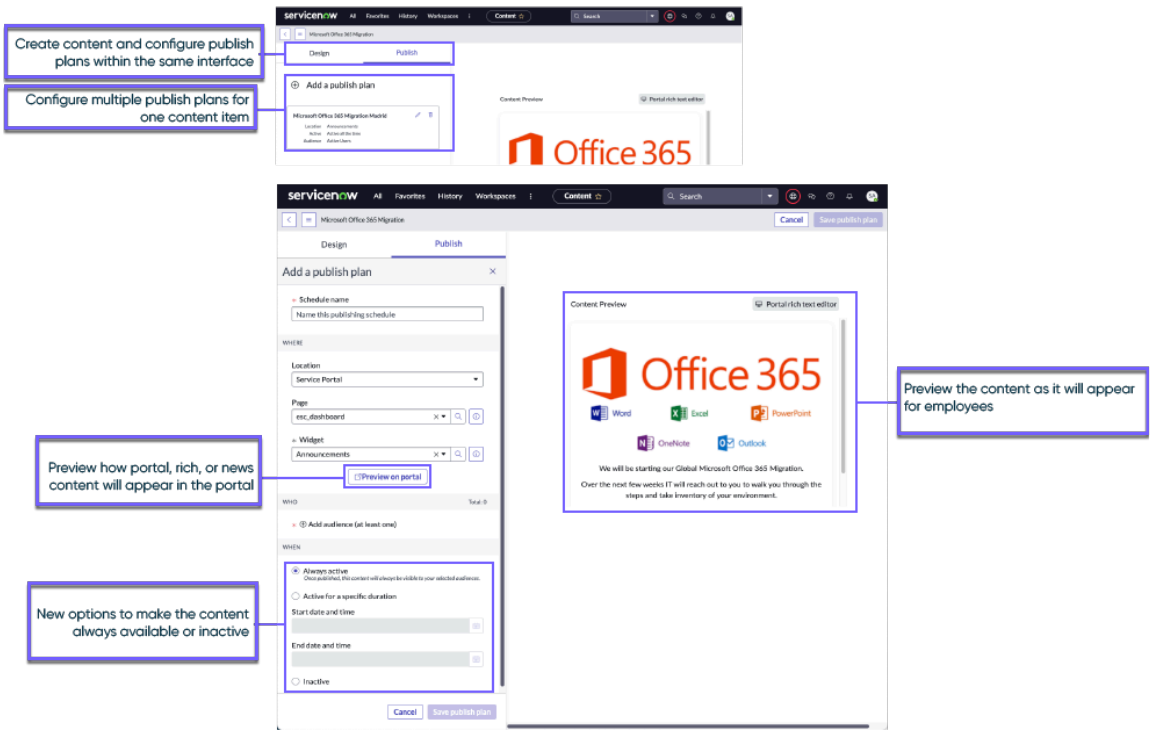
Options for publishing

Content publishing offers two options for publishing your content:

Publish plans via Content Library

Publish plans are integrated in the Content Library workflow and offer a robust configuration options, including where the content will appear, who will see it, and publishing duration. You can create a publish plan for news, rich, or portal content. For all other content types, you must use the Schedule content form.

> **Note:** To publish content to the Workspace or UIB Workspace, you must use the Schedule content form, as the Content Library does not offer the option to publish to the Workspace or UIB Workspace.



Schedule content form

Configure content delivery for the following types of content using the Schedule content form:

- Mobile content
- Notification content
- To-do content

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- Pulse survey content
- Employee Forums

Publishing destinations

When you are configuring a content schedule or publish plan, you must define the publishing destination via three fields: Location, Page, and Widget.

Location

For most content types, **Service Portal** is the only option. Some content types, such as news articles, enable you to specify a publish plan for the Now Mobile app. For more information, see Publishing news articles.

Page

The page field lists portal and taxonomy pages. To narrow the selection, you can first select a widget, then return to the page field, which only lists the pages that contain the widget.

Note: If you select a taxonomy topic, the form prompts you to specify the taxonomy and one or more topics.

Portal pages are managed in **Service Portal** > **Pages**.

Taxonomy topics are managed in **Taxonomy** > **Topics**. See Unified Taxonomy for Employee Center.

Widget

The widgets field only lists supported widgets for that content type. For more information on the content types, see the table below.

Where you can publish content

Publishing locations by content type

Content type	Supported widgets
Banner	Content Experiences
Banner	Welcome Banner (CD)
Calender	Event Calender
Event	Upcoming Events (CD)
Image-based link	Quick Links (CD)
News article	News Feed
News article	Featured News
Rich content	Rich Content (CD)
Rich text	Announcements (CD)
Styled content	Content Experiences
Styled content	Styled Content (CD)
URL	Information Links (CD)
Video	Video Carousel (CE)

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To customize the content type and publishing widget, see Add or modify content type for Content Publishing

Scheduling the delivery of content

After you create content in Content Publishing, use **Schedule Content** to post to your Employee Center, in a campaign, To-dos, email notifications, and community.

Before you begin

Role required: sn_cd.content_manager
You can also schedule content after creating and saving it from the related list of the content. See the following:

- Configure mobile content
- Portal content
- Create email, SMS, or push notification content
- Create to-do content
- Add or modify forum content
- Add or modify links to other content sources
- Add or modify block content

Note: Ensure you schedule the portal content when you are adding a link content to a banner or styled content. The to-do content is automatically scheduled separately when the link content is scheduled. For more information, see Creating to-do content.

Procedure

1. Navigate to **All** > **Content Publishing** > **Schedule Content**.
2. Select the content you want to schedule.
3. Complete the form.

Schedule content

Field	Description
Content	The content or information you want to make available to employees. Select content from the list or **New** to create content. When scheduling content you want to appear as a link for to-do content in a banner or styled content, ensure you select the portal content you created. Do not schedule the to-do content, it automatically schedules with the portal content. For more information, see Creating to-do content.

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Field	Description	
	Note: You cannot schedule Link Content and Block Content as standalone content because it is reusable content.	
Content Request Item	A unique number that identifies the content item associated with the content request. Content requests can be created from the Employee Center by employees or from the Content Request form by content managers or admins. For more information, see Edit a content request item.	
Title	A descriptive name for the schedule content record. By default, the name of your content appears here after you select your content in the **Content** field.	
Active	Indicates that the schedule for content is active and available to employees.	
Add Users	Indicates you want to add specific users to view your content. Selecting this removes the audience you selected. **Note:** To schedule content, the default is to select an audience. When you select this field, you can only select individual users and you cannot select an audience.	
Users	Users you want to view the content you are scheduling. Select the Unlock Users icon to search and add users. **Note:** This field only appears when you select **Add Users**.	

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Field	Description	
Audience	Who you want to see the content. See Audiences. Does not show for Community Content.	
Approvers	Who you want to approve the content before it is available. Only users with the Content Approver [sn_ca.content_approver] role appear after clicking the Lookup user list icon. After adding approvers, click **Update** or **Save**. You can send email notifications to approvers requesting their approval. See Notifications and Email templates. **Note:** If **Yes** is the value in the **sn_cd.all_must_approve** Content Delivery property, all approvers must approve before campaign publication. If **No** is the value, you only need one approver.	
When to process	The date and time you want your content to be sent, created, or posted. **Note:** This field only appears when you schedule to-do or notification content.	
Due date	The date and time you want your users to complete the to-do or notification content. **Note:** This field only displays when you schedule to-do content.	
Content status	The status of your to-do content.	

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Field	Description	
	○ Pending: The Content Publishing scheduled jobs have not processed the content. ○ Scheduled: Content is scheduled and is queued to be processed. ○ Max Exceeded: The scheduled content exceeded the allowable time. The maximum value is configured in the sn_cd.todo.max_run_time property under Content Publishing/Configurations/Properties. ○ Error: An error scheduling or posting community content occurred.	
Completed on	The date and time the Content Publishing: Create To-dos scheduled job completed.	
Availability start date	You can optionally restrict when content is available by start date. The date the content is first available to the audience. Does not show for Community Content.	
Availability end date	You can optionally restrict when content is available by end date. The date the content is no longer available to the audience. Does not show for Community Content.	
Location	Where the content you are scheduling appears. Your choices are: ○ Service Portal ○ Workspace The fields change depending on what you select in this field because you are	

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Field	Description	
	selecting where you want your content to appear.	
	The following fields appear when **Service Portal** is selected from the **Content location** field. For more information, see Portal content.	
	Page	The page on your Service Portal you want the content to appear. Select a page and only the widget instances that appear on the page are available in the **Widget instance** choice list. You can open the Page record and select the **Try It** button to view the page. Only appears when **Service Portal** is selected from **Content location**. **Note:** If you schedule Styled or Banner content to the Content Experiences widget on the emp_taxonomy_topic page, the original topic banner image does not display for the topics on the schedule.
	Widget	The Employee Center widget instance. A widget instance is a reference to a widget that contains properties and CSS specific to that instance. A list of filtered widget instances appear when you select a page from the **Page** choice list. Only appears when **Service Portal** is selected from **Content location**.

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Field	Description	
		Note: If you schedule Styled or Banner content to the Content Experiences widget on the emp_taxonomy_topic page, the original topic banner image does not display for the topics on the schedule.
	Taxonomy	Filters what topics you can schedule your content to. Taxonomy is a collection of hierarchical topics that brings together different content types, like requests, articles, quick links, and employee communications. For example, you can set up separate taxonomies for HR and IT so you can group specific topics under each. For this field to appear, select a page that has Taxonomy (sn_ex_sp_taxonomy) entered in the Choices tab for the dictionary entry for the Category table of the page. For more information, see Create a table. For more information on taxonomy for the Employee Center, see Unified Taxonomy for Employee Center. For child topics to appear on your Employee Center, you must add it to the Portal form under Service Portal. For more information, see Create a portal.
	Topic	The topics you want your content to appear in under a taxonomy. For more information, see Create and associate topics.
	The following fields appear when **Community Content**	

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Field	Description	
	is the content type for content selected. For more information, see Community content types.	
	Forum	The forum you want to post the community content. For more information on forums, see Create a forum.
	Topics	The area of interest that users can discuss. Click to select a topic that is within the forum. For more information on topics, see Create a topic.
	The following fields appear when **Workspace** is selected from the **Content location** field:	
	Content identifier	Associates portal content to widgets in Agent Workspace custom landing pages. **Note:** Currently, only HR Service Delivery Agent Workspace has base system components that shows content for Content Publishing. This field only appears when you select **Workspace** from the **Content location** field. When the custom landing page of Agent Workspace renders, the following components search for scheduled content that matches the content identifier, applies to the current user, and current time: ○ Announcements ○ Quick Links

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Field	Description	
		○ My frequently used apps **Note:** The base system provides these components, but the labels can be changed. To find content identifiers for the base system provided workspace landing pages, see Create a custom landing page in UI Builder. **Note:** For more information, see Setting up landing pages in a workspace.

4. Select **Submit** or **Update**.
   You can also select **Publish with Approval** when a content request and content request item have been approved by the content requester. For more information, see Add or remove content approvers.

Create a publish plan for your content

After you create content in the Content Library, add one or more publish plans to control where the content is delivered, the audience, and the period of time it is available.

Before you begin

Role required: sn_cd.content_manager

Note: When the Enable Content Management Ownership sys properties are activated, you can only schedule and publish content assigned to you. For more information, see Content Ownership

To publish Rich content to the UIB Workspace, you must create a schedule content record, as publish plans do not support publishing to the UIB Workspace.

Procedure

1. Navigate to **Content Publishing** > **Content Library**.
2. Select the content you want to publish.
   If you can't find the content you want to publish, ensure the **Active** field is checked on your content.
3. Select **Save** or **Save and continue**.
4. Select the **Publish** tab.
5. Select **Add a publish plan**.
6. Fill in the form.

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Add a publish plan

Field	Description
Schedule name	The name that describes the schedule for your content.
Order	The order in which the content appears in a widget, relative to other content published to the same widget. Content with a lesser order value appears first. If two content items have the same order value, the content will appear based on the most-recent publish date.
WHERE	
Location	Where you want your content to appear. Your choices are: ○ Service Portal ○ Mobile (for News articles only) ○ Workspace: Requires the Human Resources Scoped App: Workspace (com.sn_hr_agent_workspace) plugin to be activated.
Section	This option appears if you select **Mobile**. The section in the mobile app where you want the news content to appear. This is a read-only field. An Admin can update this field from the **Content Publishing** > **Advanced** > **Properties**. For more information, see Properties installed with Content Publishing.
Page	This option appears when you select **Service portal** or **Workspace**. The page on your Employee Center you want your content to appear. A page is a pre-existing record that contains code and structure that define how to display content you want to schedule and make available to your employees.

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Field	Description
	Note: Templates are contained in a topic and references a page. Templates have a direct relationship with a page, but multiple topics can be associated with a template/page. For example, the base system provides the emp_employee-taxonomy page and most of the topics are associated with that page. For more information, see Create topic page template. When a page has topics associated with it, the **Taxonomy** field appears and you can filter by it and you can select topics associated with the taxonomy. Select a page and only the widget instances that appear on the page are available in the Widget instance choice list. Select the Preview this record icon  to view the page record. **Note:** Using Page to help filter the available widgets across the portal can be useful, but is optional.
Widget	The widget you want your content to appear in. Widgets contain properties and CSS specific to that instance. A list of filtered widget instances appear when you select a page from the **Page** choice list. Select the Preview this record icon  to view the widget record. **Note:** If you schedule Styled or Banner content to the Content Experiences widget on the emp_taxonomy_topic page, the original topic banner image does not display for the topics on the schedule.
Taxonomy	The taxonomy or top level in the organization hierarchy you want your content to appear under. Also allows you to filter your preview by taxonomy. Taxonomy is a collection of hierarchical topics that brings together different content

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Field	Description
	types, like requests, articles, quick links, and employee communications. A taxonomy is the top-level of the hierarchy and can have multiple topics under it. For example, you can have taxonomies for HR and IT so you can group specific topics under each. When you use **Page** or **Add Topic** to filter your preview, the value in this field can change because the topic might not be under the taxonomy or on the page you selected. When this field is greyed out, it indicates for the page and topic selected, there is only one taxonomy.
Add Topic	The topic you want your content to appear under. Also, allows you to preview content associated with a topic. Topics are organized under a taxonomy. When the Allow Ownership for Topics (sn_cd.activate_topic_ownership) sys property is set to **Yes** and the topic is assigned to you or a group you belong to, you only see topics assigned to you or topics that do not have restrictions. For more information, see Properties installed with Content Experiences and Assign ownership of content. Ownership of a topic includes: ○ Ability to restrict what groups or users can schedule content for publication. ○ Ability to edit content assigned to the topic. ○ Ability to preview content for the topic. **Note:** Other users that have access to the content can view the content scheduled to the restricted topic, but cannot remove the topic from the schedule. For more information, see Content Ownership.
Who	
Add audience (at least one)	Who you want to see the content. For more information, see Audiences.

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Field	Description
	Note: You do not have the option of scheduling content for individual users. You can only schedule content for an audience. To schedule content for individual users, see Scheduling the delivery of content.
WHEN	
Always active	Content appears indefinitely until you replace or take it down.
Active for a specific duration	Content appears for a specific date and time range.
Inactive	Content is available for use, but does not appear on the Employee Center.

7. Select **Save publish plan**.

   After you create a publish plan, the **Preview on portal** button appears in the **Publish** tab, which redirects you to view how the content will appear on the employee portal once published.

   Once rich or portal content is published, you must checkout the content to edit it. See Checkout published content.

Multilingual support in the Content Library

The Content Library includes two features for multilingual content creation: Translate content (content translation workflow) and Switch language (changes the interface language).

Switch language vs Translate content

When the Translations and Language switching properties are enabled, the Content Library has two language settings options:

Switch language

The Switch language option enables content creators to change the language of the Content Library interface (similar to changing the system language setting).

Translate content

The Translate content option sends the content for translation in the specified language.

For more information on the properties, see Properties installed with Content Publishing.

Translating content in the Content Library

After you are done creating content, you can initiate the translation workflow to request translation for your portal, block (re-usable components), notification, or to-do content.

Note: At this time, translation is not available for the Calendar content type.

The following provides an overview of the base translation workflow. The admin for your company may configure additional translation modes, such as an integration with a third-party service to automate translation.

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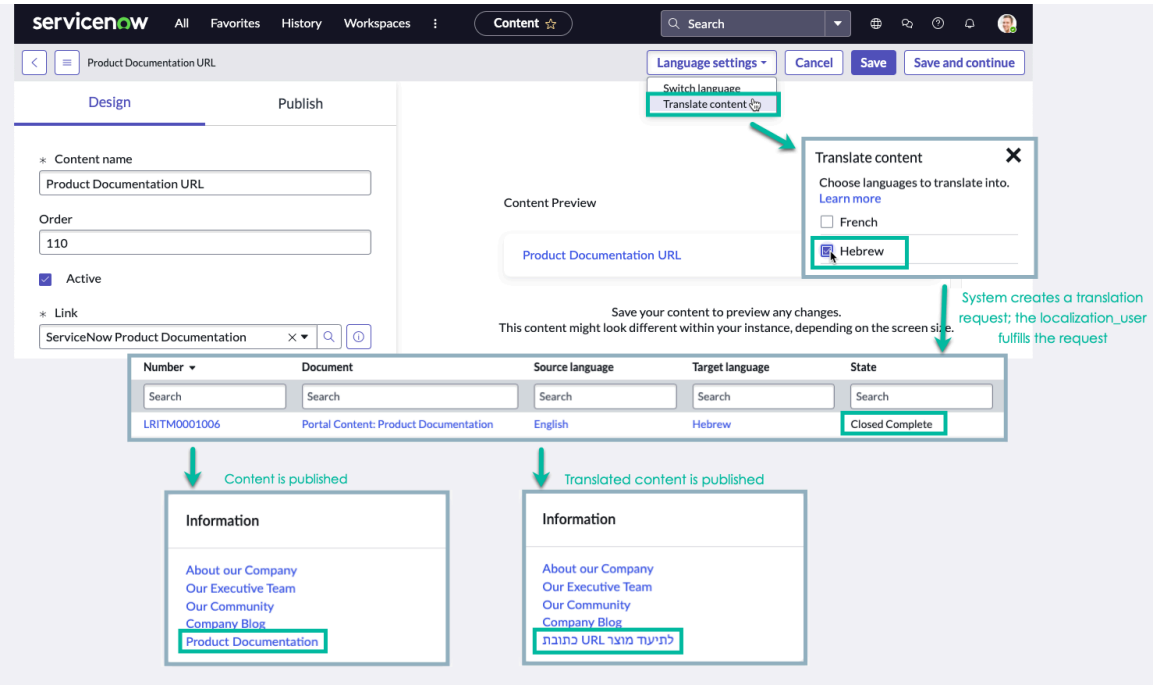

1. The Content manager requests content translation from the Content Library or Block content interface and specifies the languages.
2. The system creates a localization request item (prefix LRITM) for each language selected. Each localization request item has an associated localization task (prefix LFTASK), which is assigned to the user or group with the localization_fulfiller role.

   The Content manager can view the status of the localization request item from the **Localization Framework** > **My Requested Items** list.
3. The user with the localization_fulfiller role performs the translation. For more details, see Fulfill a localization task.
4. When the localization request item has a `Closed complete` state, the Content manager can schedule the content for publishing, see Create a publish plan for your content. The system uses the same content schedule for the original and translated content.

Changing the Content Library interface language

The *`Switch language`* window displays available languages, each appended by one of three possible statuses:

Base language

The default language based on system settings.

Translated

Indicates that translations are available for the content. This occurs when the content has been translated through the Localization Framework or manually translated in the New Content form fields.

Selecting this option will translate both the interface and the values entered in the New Content form to the chosen language.

Not translated

Translation for the field values is not available. In this case, only the interface language is translated, while the values entered in the form remain unchanged.

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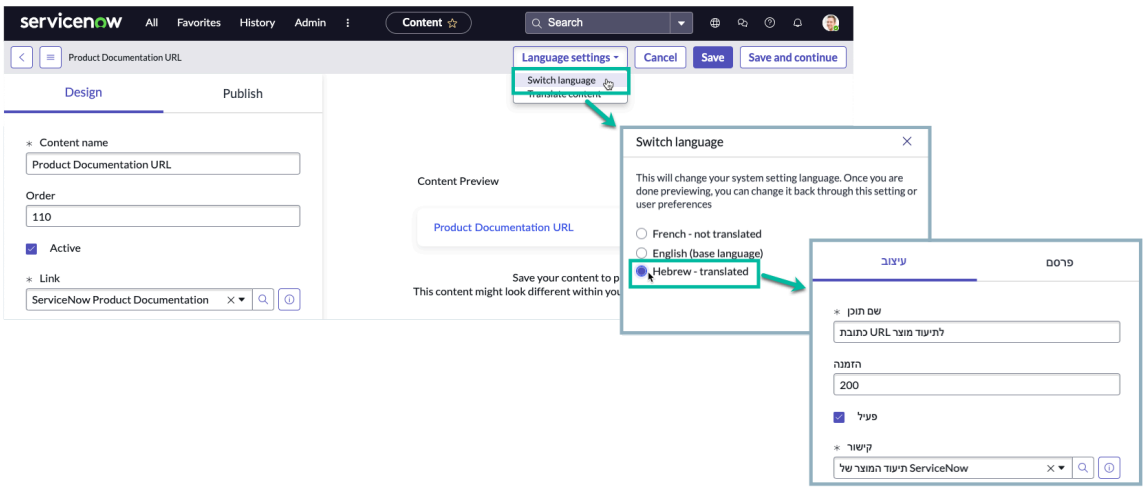

Note: Remember to switch back to your original language before leaving the page, otherwise the ServiceNow interface will continue to appear in the translated language.

Content versioning and translation

When content versioning is enabled, the **Switch Language** button appears only for the first draft version and published content.

Customers who create content in a non-English language should use of the the following workarounds:

- Turn off Content versioning, then click the **Switch Language** button to enter the content in a non-English language.
- Enter the content in English, then use the **Translate Content** button to initiate the translation workflow.

For more information, see Content versioning.

Creating campaigns

Campaigns offer a powerful content publishing tool that provides organizations with the ability to efficiently deliver targeted information to their employees. As a content manager, you can configure multiple channels to ensure content reaches the intended audience at the optimal time.

Here are a few examples of what you can accomplish through the targeted messaging of campaigns:

- Deflect: Prevent your employees from creating more inquiry cases.
- Drive action: Encourage your employees to sign up for health benefits.
- Provide communication: Ensure that your employees know about a specific subject.

Note: Campaigns are intended for internal communications only. Please do not use campaigns for customer marketing, as doing so could potentially lead to the NOW mailsystem being flagged as spam by email reputation systems.

Example campaigns

Content Experiences includes demo campaigns to help you better understand campaign structuring, explore examples of bundle trigger configurations, and discover various use cases.

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To access the demo campaigns, navigate to **All** > **Content Experiences** > **Content Experience Builder**.

Note: The admin must select **Load demo data** during the installation or upgrade of the Content Experiences plugin. If the demo data does not appear in your instance, ask your admin to install the demo data.

Campaign components

When planning a campaign, consider the following components:

Who: Audiences

Target different content to different audiences. You can have a campaign deliver one set of content to managers and another set to direct reports.

When: Trigger

Content becomes available to employees based on the configured trigger. Content can be made available based on a fixed or dynamic date range, when a condition is met, or a system event occurs.

Where: Location

Target content to specific pages, topics, and widgets to ensure the content reaches the intended audience.

What: Information that you want to communicate

Define the information, links, videos, SMS messages, and emails that you want to communicate to your employees.

Campaign structure

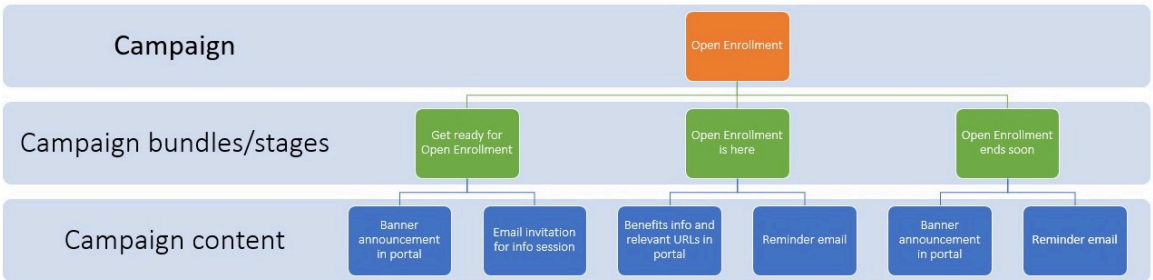
A campaign consists of a hierarchy of stages, where each stage contains content.

Note: Some parts of the interface use the term "bundles" to refer to stages.

Here's an example of how to structure a company benefits open enrollment campaign, consisting of three stages:

1. Get ready for Open Enrollment: This stage delivers content before the open enrollment period to prepare employees.
2. Open enrollment is here: This stage delivers content during the open enrollment period to provide the necessary information on employee benefits.
3. Open enrollment ends soon: In this stage, reminders are sent during the final week of the open enrollment period.

Each campaign stage includes content that will be visible on the employee portal and distributed via email.



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Setting up a campaign

Set up a campaign using one of the following methods:

- Content Experience Builder
- Legacy (records and forms)

Content Experience Builder

With the Content Experience Builder, you can complete the entire workflow of configuring a campaign within a single interface.

1. Create content in the Content library

   You can create a variety of content types that can be delivered via the employee portal, email, SMS, or push notification.

   Note: News articles are not yet supported.

2. Create a campaign

   Create a campaign to define the audience, content approvers, and start and end dates.

3. Create campaign stages with Content Experience Builder

   Add stages to your campaign to define what content users will see and when they will see it. You can also use stages to further refine the audience. For example, you can create one stage to hold content for managers and another stage to hold content for direct reports.

4. Add content to a campaign using Content Experience Builder

   You can add content from the Content library and create a variety of content types in the Content Experience Builder.

   Note: If you are creating a campaign that contains rich content, you must create the rich content in the Content Library Rich Content Editor, since the Content Experience Builder does not currently support rich content creation. See Microsites

5. Preview the campaign

   See how your campaign will appear to your audience before publishing.

6. Publish the campaign from the Content Experience Builder.
7. Analyze the effectiveness of the campaign

   Verify that your campaign is targeting the correct audience. Create goals to see if your campaign is driving action from your employees, or reducing activity such as the number of inquiry cases coming in. Continually evaluate your campaign as it progresses.

Legacy (records and forms)

If you prefer to create campaigns using records and forms, or if you are publishing to a custom widget, follow these steps:

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1. Create content in the Content library

   You can create a variety of content types that can be delivered via the employee portal, email, SMS, or push notification.

2. Create a campaign

   Create a campaign to define the audience, content approvers, and start and end dates.

3. Create a campaign stage

   Add stages to your campaign to define what content users will see and when they will see it. You can also use stages to further refine the audience. For example, you can create one stage to hold content for managers and another stage to hold content for direct reports.

4. Preview the campaign

   See how your campaign will appear to your audience before publishing.

5. Publish the campaign
6. Analyze the effectiveness of the campaign

   Verify that your campaign is targeting the correct audience. Create goals to see if your campaign is driving action from your employees, or reducing activity such as the number of inquiry cases coming in. Continually evaluate your campaign as it progresses.

Create a campaign

Create a campaign to push communications and important information to your employees.

Before you begin

Role required: sn_ca.campaign_manager

If you would like to use Content Analytics to track the success of your campaign, you must set up a tracking profile and activate it. For more information, see Content Analytics.

About this task

Campaigns are organized in a hierarchical structure.

Create a campaign by defining a title, state, audience, start and end times, and other information. For example, you can create a campaign that promotes open enrollment for health benefits, targeting new hires, and runs through the open enrollment period.

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Click **New**.
3. Fill in the following fields:

Campaign new record form

Field	Description
Title	Unique name for the campaign.
State	State of the campaign. This field automatically updates as you move through the campaign configuration process.

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Field	Description
Audience	Audience that will view the content of a campaign. Click the Unlock Audience icon to select the audience that you want the campaign to target. For more information, see Create an audience.
Approvers	Users responsible for approving content before the campaign is published. When you click the Lookup using list icon, only users with the Campaign Approver sn_ca.campaign_approver role appear. The approvers receive an email notification that you require their approval. For more information, see Notifications and Email templates.
Description	Descriptive information about the campaign.
Start time (yyy-MM-dd HH:mm:ss)	The date and time that a campaign will launch. **Note:** To publish a campaign, you must define the start date and time.
End time (yyy-MM-dd HH:mm:ss)	The date and time that a campaign will end.
Re-evaluate campaign	Option for reviewing the audience for a campaign. Check the box to display the **Re-evaluate frequency** field to define how often you want the **Content Experiences: Update Campaign Audience** scheduled job to run. When your campaign is re-evaluated, it removes or adds users depending on the current audience criteria. If the **Re-evaluate campaign** box is unchecked, the **Content Experiences: Update Campaign Audience** scheduled job runs one time after which the targeted audience is never re-evaluated or changed.
Re-evaluate frequency	The frequency, in days, that you want to re-evaluate the audience. **Important:** To ensure that campaigns reflect any audience changes occurring since the last publication date, it is necessary to set the re-evaluation frequency.

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Field	Description
	Audiences are re-evaluated after the *Content Experiences: Update Campaign Audience* scheduled job runs based on the value you enter here. This field appears only after you select the **Re-evaluate campaign** check box. The value you set in this field overrides the default (7 days) value that is set in the **Campaign Re-evaluation** field in the Content Experiences system property. For more information, see Properties installed with Content Experiences.
Tracking on	Enables Content Analytics to track metrics for this campaign.
Tracking profile	Tracking profile to use for Content Experiences analytics. Profiles determine what data to capture for campaign analytics. This field appears when the **Tracking on** option is selected. Click the Lookup using list icon and select the tracking profile that you want to use.

4. Click **Save** to remain on the campaign page.
   Clicking **Submit** returns you to the campaigns list.

What to do next

Click **Next** or the **Schedule of Content** tab to add stages and content to the campaign: Create campaign stages with Content Experience Builder

Campaign bundle triggers

Define a trigger to make the content in the campaign stage available to employees.

A campaign bundle organizes and manages the delivery of campaign content. When configuring a bundle, you set the bundle trigger, which determines when content becomes available and for how long.

Note: The interface use the terms "bundle" and "stage" interchangeably.

Campaign bundle triggers

Trigger	Description
Immediate	The content is visible to the audience immediately after campaign publication, for the duration of the campaign. Create a campaign stage with immediate trigger

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Campaign bundle triggers (continued)

Trigger	Description
Fixed date	The content becomes available according to a specific start and end date and time and within the start and end date and time of the campaign.
Recurring	Use to create a campaign stage (bundle) that has date-based repeatable content. For example, use this trigger for content specific to employee birthdays or work anniversaries. Create a campaign stage with recurring trigger
To-do completion	The content in this campaign stage becomes available when a user completes a specific to-do item from another stage in the campaign. Create a campaign stage with to-do trigger
Dynamic	The campaign stage triggers when a field in a table (sn_hr_core_profile or sys_user) fulfills a specific condition. An example use case for this trigger type is a new hire campaign, where each stage contains onboarding content for each week and delivers the content based on the employment start date. **Note:** The dynamic stage trigger will show content only one time. To configure a stage that is triggered on a repetitive basis, such as on an annual basis, use the recurring trigger. Create a campaign stage with dynamic trigger
Condition	This trigger type is specifically for Employee Journeys: Parental Leave of Absence. You can use it for your process, but it is an advanced feature that requires building a triggering mechanism, such as a business rule or scripting. Create a campaign stage with condition trigger

Create campaign stages with Content Experience Builder

Use the Content Experience Builder to create stages for your campaign on Employee Center Pro. Campaign stages control when content is available to your employees and for how long. The Content Experience Builder provides a simple, single-page view for managing content and assembling your campaign.

Before you begin

Role required: sn_ca.campaign_manager

Complete the steps to Create a campaign

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About this task

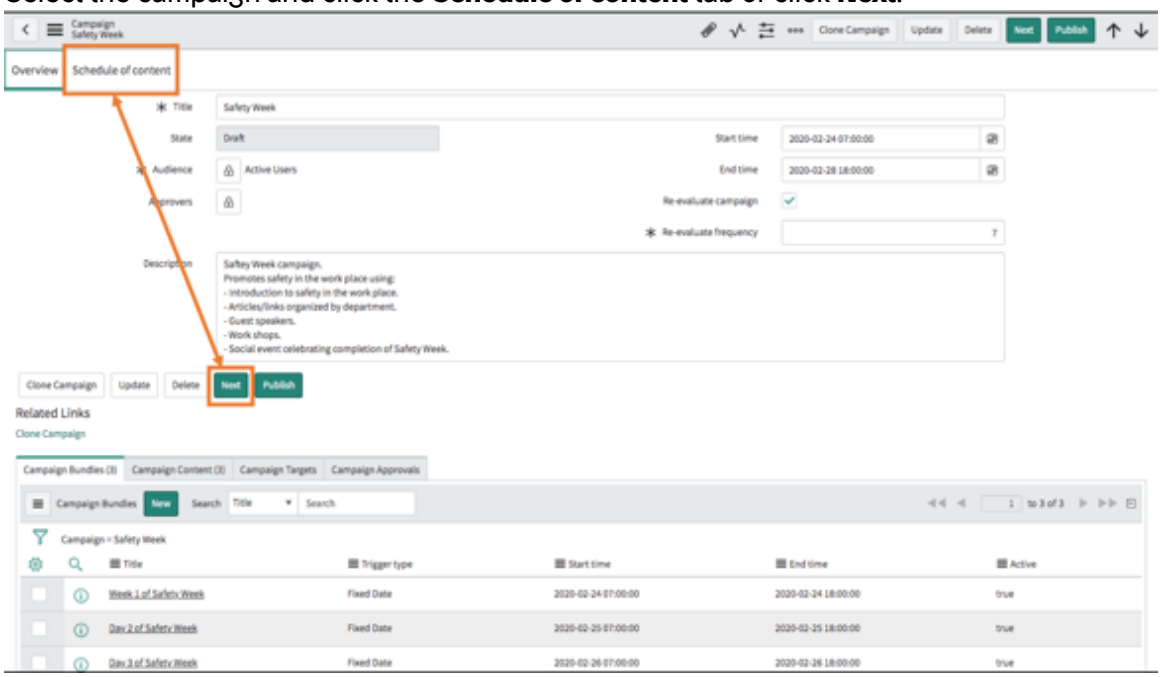
Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long. To learn more about triggers, see Campaign bundle triggers.

Note: Some parts of the interface use the term "bundles" to refer to stages.

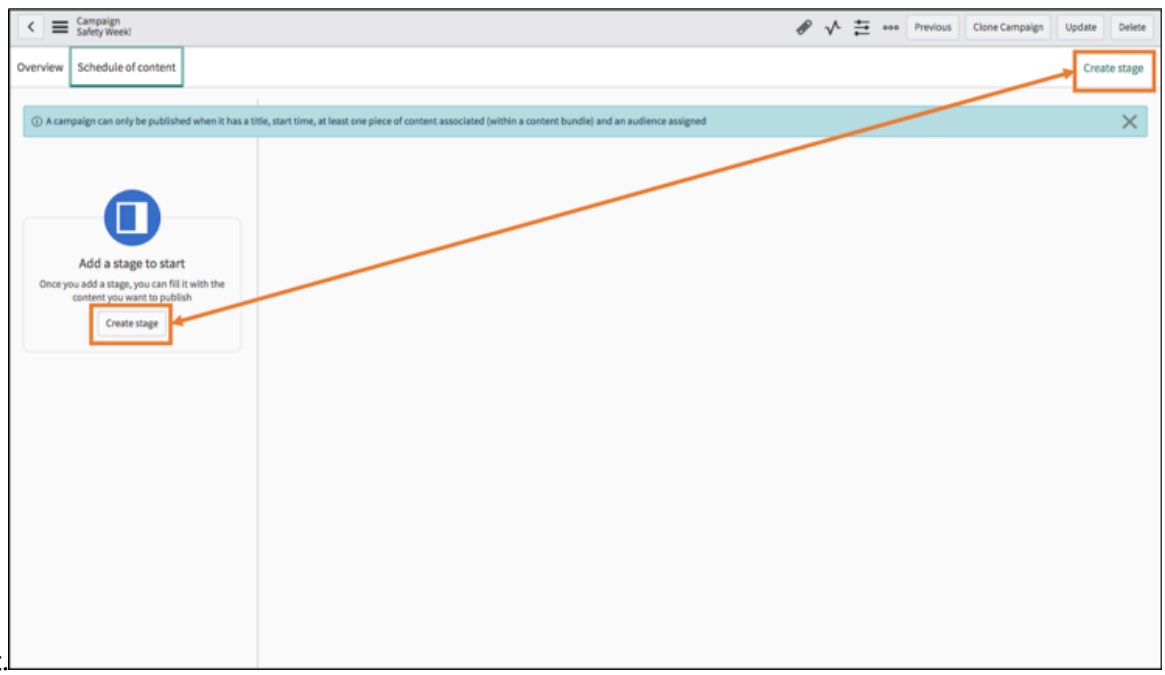
Procedure

To open a campaign in the Content Experience Builder do steps 1 and 2. If you have already opened the campaign in the Content Experience Builder, proceed to step 3.

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.



3. Click **Create stage**.
   A stage is a visible area to add content.



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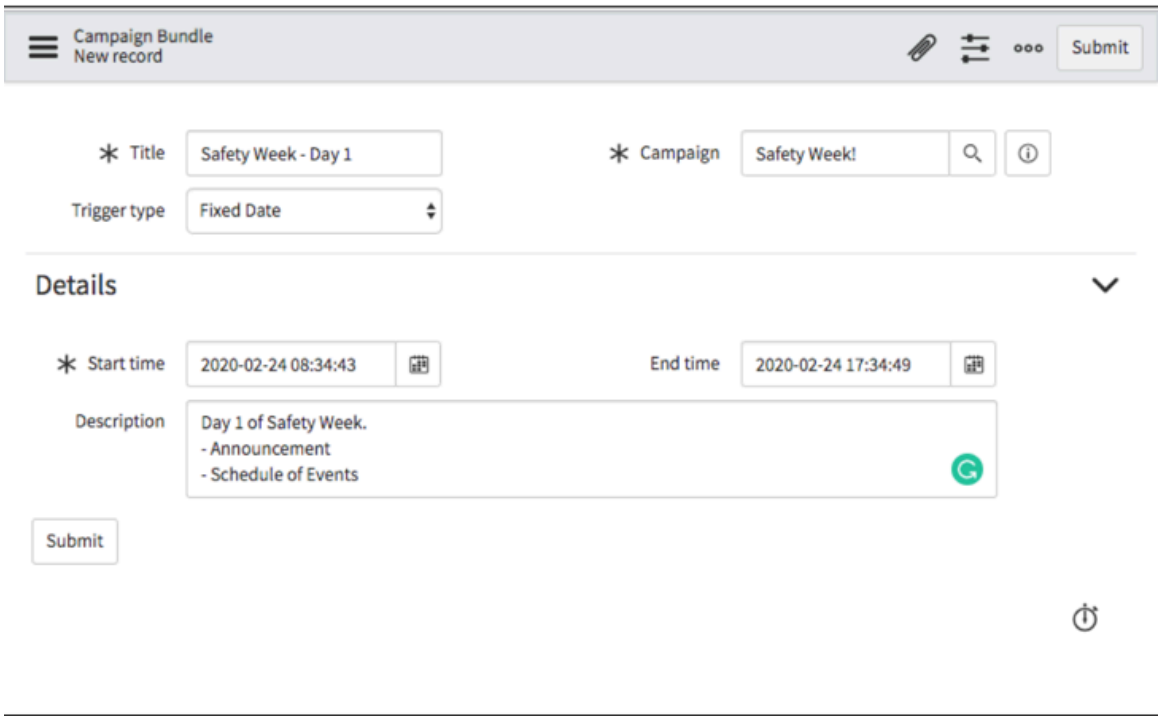
4. On the form, fill in the fields.

Campaign Bundle form

Field	Description
Title	The name of the campaign bundle.
Campaign	The campaign associated with the campaign bundle.
Trigger type	How the campaign bundle starts or ends. To learn more about triggers, see Campaign bundle triggers
Description	Descriptive information about the campaign bundle.



5. Click **Submit**.

What to do next

- Click **Add stage** to configure additional stages
- Add content to the stage, specify an audience, and set the location where the content will be delivered. For more information on creating content in the Content Experience Builder, see Add content to a campaign using Content Experience Builder

Create a campaign stage with to-do trigger

The content in a stage with a to-do trigger becomes available when a user completes a specific to-do item from another stage in the campaign. For example, create a stage that sends a confirmation email when an employee completes the "Select health plan" to-do item.

Before you begin

Role required: sn_ca.campaign_manager

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Complete the steps to Create a campaign

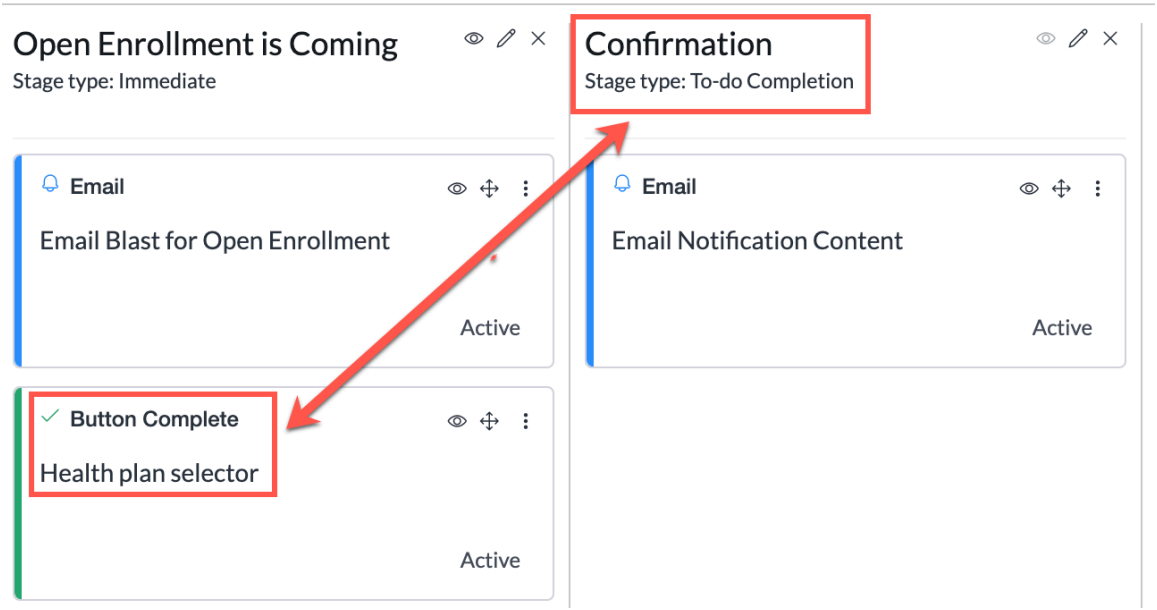
Create a stage with a to-do content item. For more information on this content type, see To-do content.

About this task

Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long.

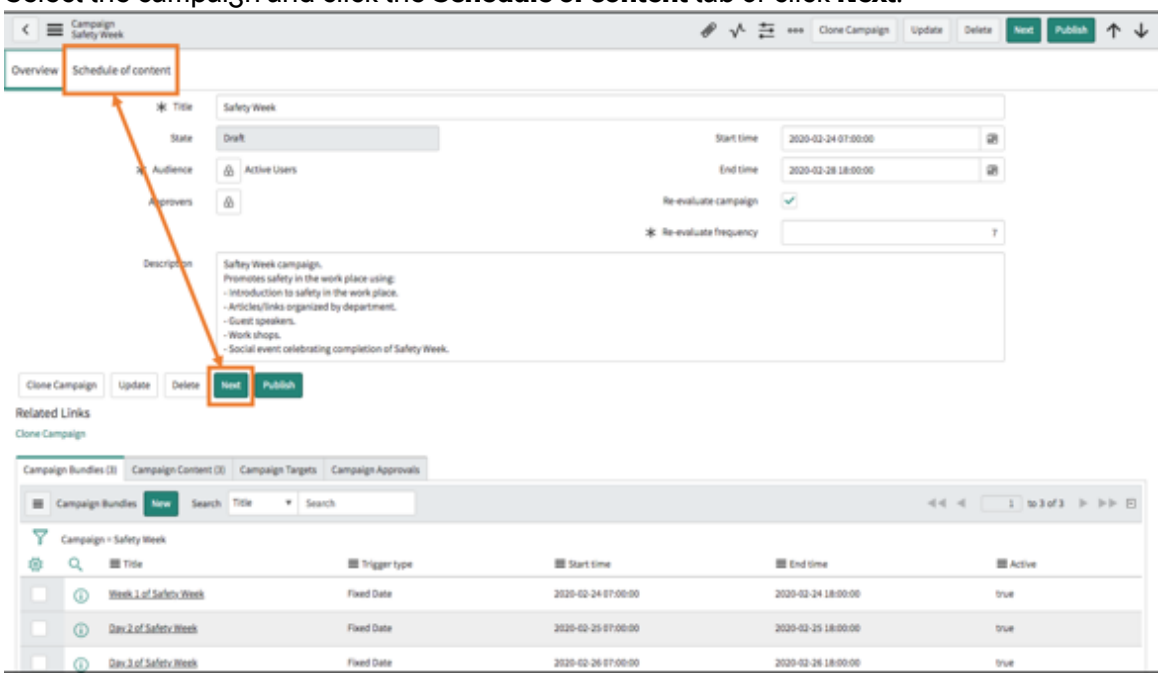
Note: Some parts of the interface use the term "bundles" to refer to stages.

Create a stage that is triggered when the user completes a to-do item from another stage.



Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.



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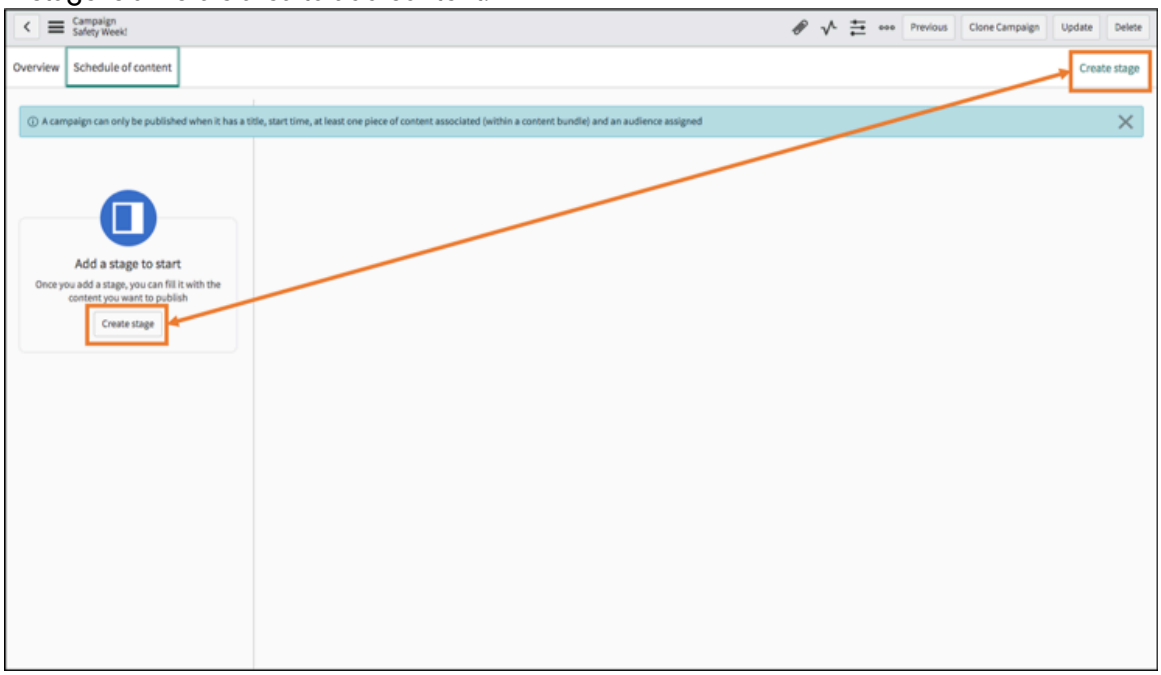
3. Click **Create stage**.
   A stage is a visible area to add content.



4. On the form, fill in the fields.

Campaign Bundle form

Field		Description
Title		The name of the campaign bundle.
Campaign		The campaign associated with the campaign bundle.
Trigger type		Select **To-do Completion**.
Description		Descriptive information about the campaign bundle.
Trigger item		The to-do item that activates the content in this bundle.
Offset start date		Select this check box to trigger your campaign stage before or after the actual trigger start date.
Date offset quantity		The number of days, weeks, or months to offset the trigger type.
Date offset units		Units of time to offset the trigger type.
When		Whether to offset the units before or after the set date.
End > **Duration type**		Defines how long the content in this stage is available. Choose from:

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Field		Description
		○ **Campaign end date** makes content available until the campaign ends. ○ **Time Length** ends content after a specific number of days or hours. ○ **Dynamic field** uses a trigger table and field to determine when content is no longer available. An example is to end content based on an employee's HR profile and employment end date.
If you selected **Time Length**	Item duration	The number of days, hours, minutes, and seconds you want your campaign stage to remain active.
If you selected **Dynamic field**	End date table	Specify the table from which to select the condition that ends the campaign stage.
	End date field	The fields from the table you selected that you want to create a condition that triggers your campaign bundle.
	Offset end date	Select to indicate content availability ends after a specific amount of time.
	Date offset quantity	The number of days, weeks, or months to offset the trigger type. This field works with the next fields to determine when content is available.
	Date offset units	Units of time to offset from the content end date.
	When	Whether to offset the units before or after the set date.
Close other content		Select to make content from previous stages unavailable.

5. Click **Submit**.

What to do next

- Click **Add stage** to configure additional stages
- Add content to the stage, specify an audience, and set the location where the content will be delivered. For more information on creating content in the Content Experience Builder, see Add content to a campaign using Content Experience Builder

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Create a campaign stage with immediate trigger

The content in a stage with an immediate trigger is visible to the audience immediately after campaign publication, for the duration of the campaign.

Before you begin

Role required: sn_ca.campaign_manager

Complete the steps to Create a campaign

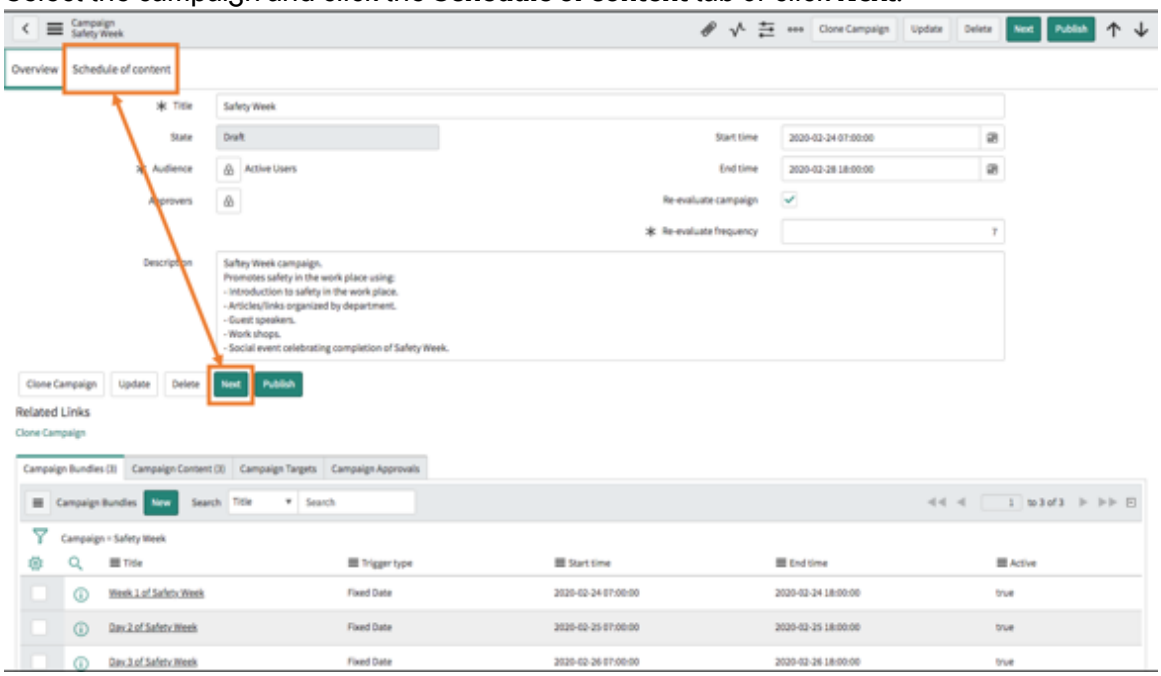
About this task

Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long.

Note: Some parts of the interface use the term "bundles" to refer to stages.

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.



3. Click **Create stage**.
   A stage is a visible area to add content.

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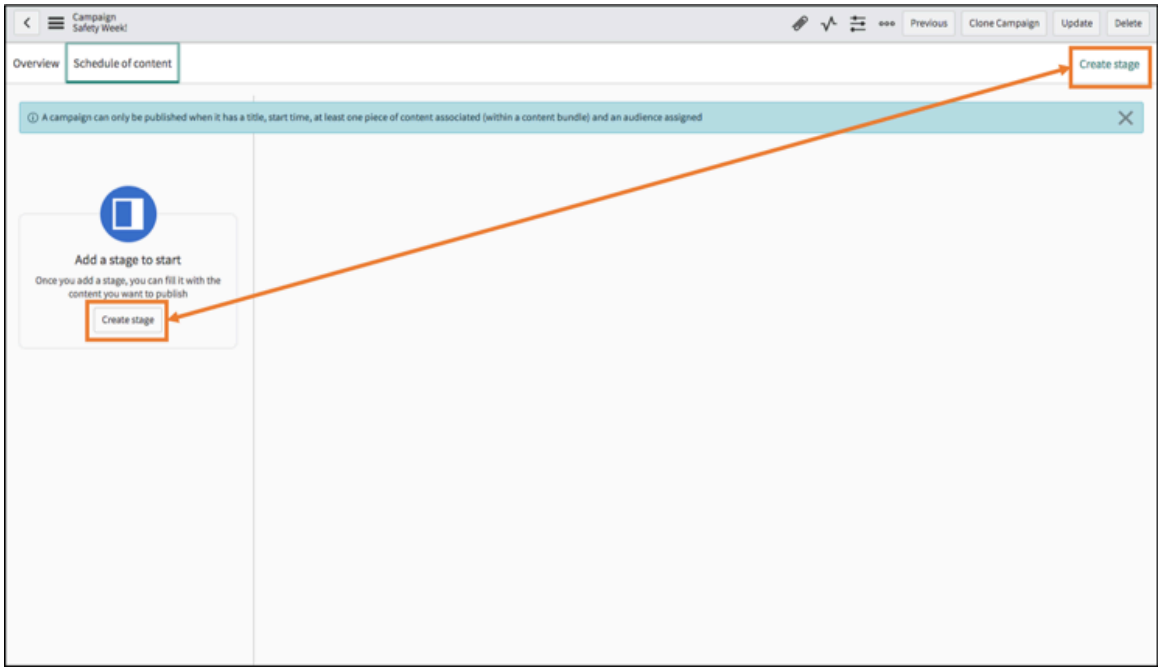

4. On the form, fill in the fields.

Immediate trigger configuration fields

Field	Description
Offset trigger start	Enables you to move the start date forward or backward from the dates set in the campaign stage.
Date offset quantity	The number of days, weeks, or months to offset the trigger type.
Date offset units	Units of time to offset the trigger type.
When	Determines whether to trigger the stage content before or after the dates set in the campaign bundle.
Specify end	Enables you to set a specific end to the content availability in this campaign stage.
Duration type	Defines how long the campaign stage is active. Choose from: ○ **Campaign end date** makes content available until the campaign ends. ○ **Time Length** ends content after a specific number of days or hours. ○ **Dynamic field** uses a trigger table and field to determine when content is no longer available. An example is to end content based on an employee's HR profile and start date.
Offset trigger end	Appears when you select **Dynamic field** duration type. Select to indicate you want

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Field	Description
	content to end days, weeks, or months before or after the trigger field end value.

5. Click **Submit**.

What to do next

- Click **Add stage** to configure additional stages
- Add content to the stage, specify an audience, and set the location where the content will be delivered. For more information on creating content in the Content Experience Builder, see Add content to a campaign using Content Experience Builder

Create a campaign stage with recurring trigger

Use this trigger to publish date-based repeatable content. For example, recognition announcements like birthdays or work anniversaries.

Before you begin

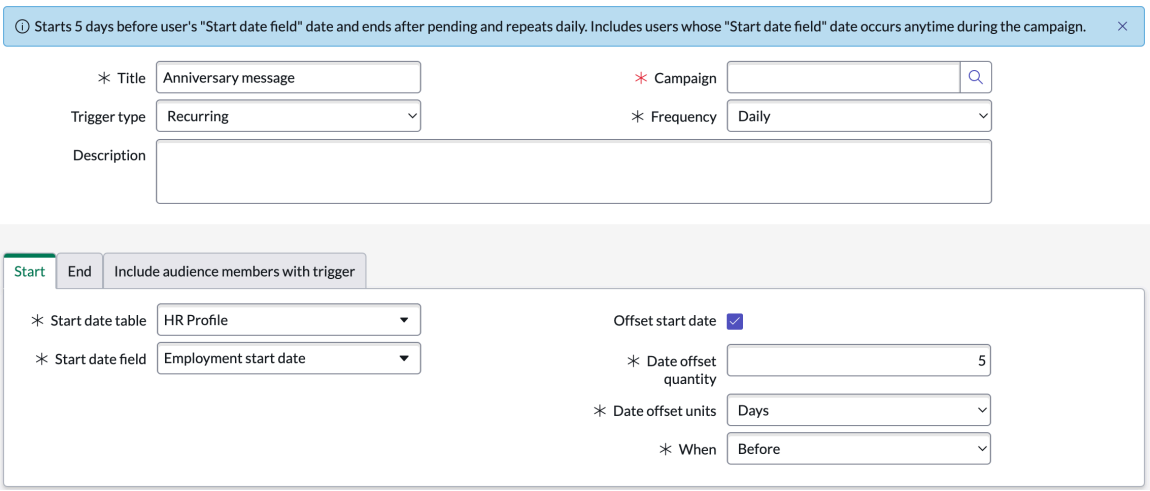
Role required: sn_ca.campaign_manager or sn_cd.content_admin

Complete the steps to Create a campaign

About this task

Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long.

Note: Some parts of the interface use the term "bundles" to refer to stages.



Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.

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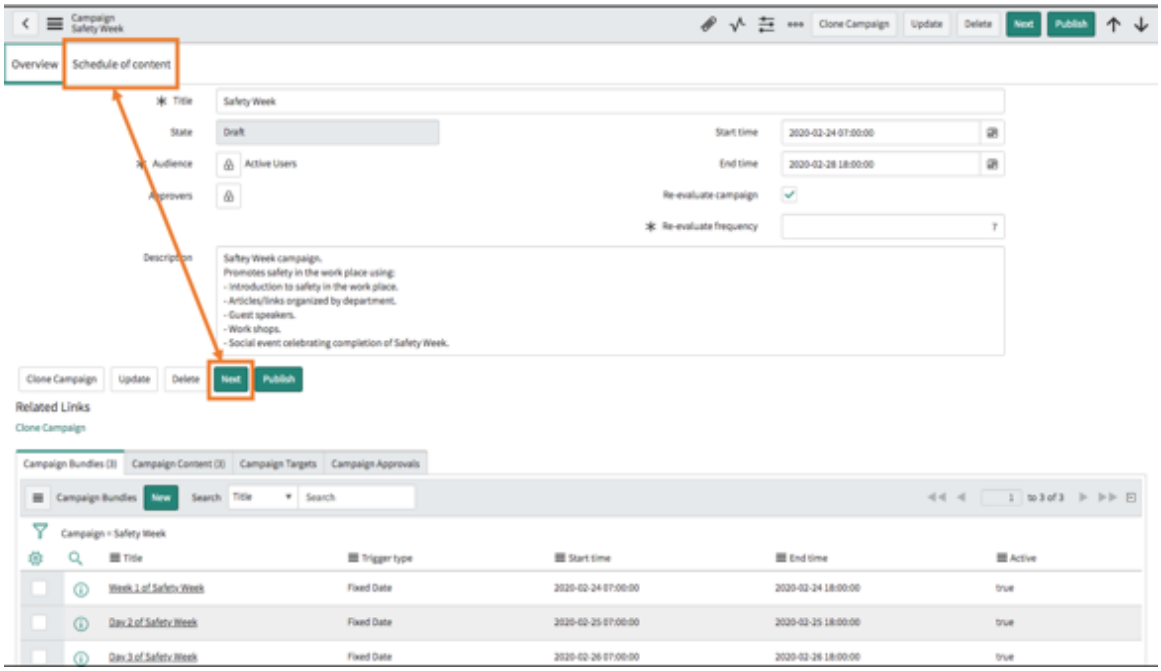
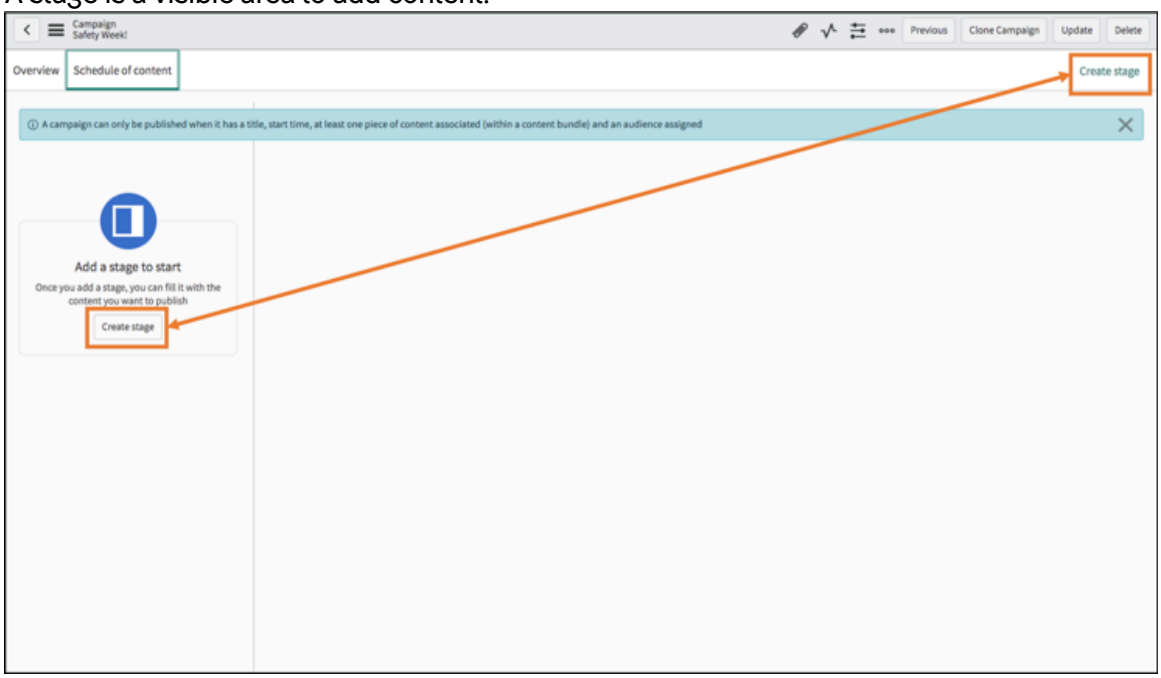


3. Click **Create stage**.
   A stage is a visible area to add content.



4. On the form, fill in the fields.

Recurring trigger configuration fields

Field	Description
Frequency	Defines how often you want your announcement to repeat. Choose from: ○ Daily ○ Weekly ○ Monthly ○ Yearly

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Field	Description
Start date table	The table you want to base your recurring campaign stage to trigger. Choose from: ○ HR profile (sn_hr_core_profile) ○ User (sys_user)
Start date field	The fields from the table you select to base your recurring campaign stage to trigger. For example, if you are creating a recurring campaign stage for employee birthdays, select the HR profile table and **Date of birth** from this drop-down.
Offset start date	Select this check box to trigger your campaign stage before or after the actual trigger start date. For example, if you are creating a recurring campaign stage for employee birthdays, you can trigger the campaign stage 2 days before the employee birthdays and keep the campaign stage active after the employee birthdays. **Note:** Content is not triggered unless the initial trigger is in the past. For example, if you set a yearly recurring trigger on a date in 2024, the content does not trigger until 2024, so the trigger must be set in the past. You can use the Offset trigger start field to pull the initial trigger start date before the current date.
Date offset quantity	The number of days, weeks, or months to offset the trigger type. This field works with the next fields to determine when content is available. For example, if you want your campaign stage to trigger 2 days before the actual date, enter 2 and select **Days** in the **Date** offset units drop-down.
Date offset units	Units of time to offset the trigger type.
When	Determines whether to trigger the stage content before or after the dates set in the campaign bundle.
End > **Item duration**	The number of days, hours, minutes, and seconds you want your campaign stage to remain active.
Include audience members with trigger > **That occurs**	Specifies whether the content in the stage becomes available to new audience members. Choose from:

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Field	Description
	○ **Anytime**: Includes all users in the campaign. ○ **During campaign**: Content is only available to users for whom the triggering event occurs after the campaign start date. ○ **After specified**: Content is available only to users for whom the triggering event occurs after a specific date.

5. Click **Submit**.

What to do next

- Click **Add stage** to configure additional stages
- Add content to the stage, specify an audience, and set the location where the content will be delivered. For more information on creating content in the Content Experience Builder, see Add content to a campaign using Content Experience Builder

Create a campaign stage with dynamic trigger

The campaign bundle triggers based on a trigger table (sn_hr_core_profile or sys_user), trigger field, and date offsets.

Before you begin

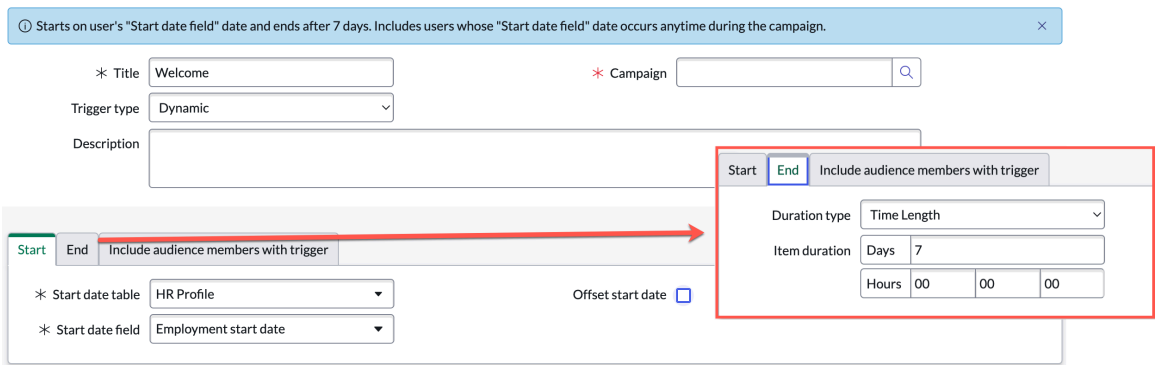
Role required: sn_ca.campaign_manager

Complete the steps to Create a campaign

About this task

Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long.

Note: Some parts of the interface use the term "bundles" to refer to stages.



Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.

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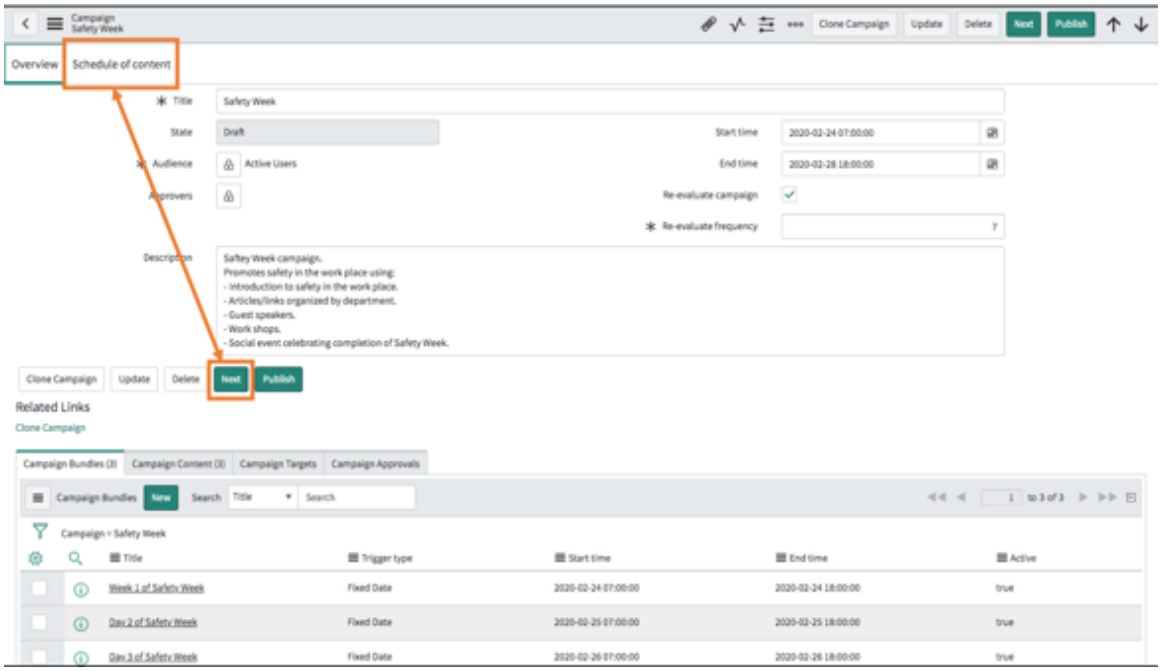
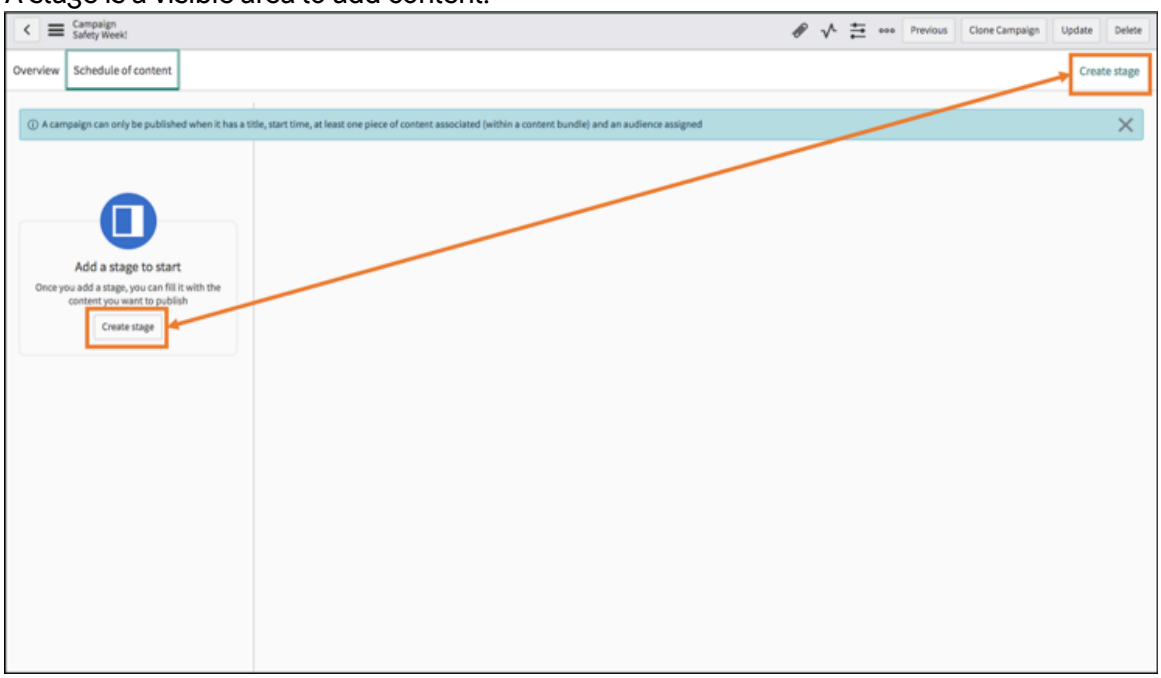


3. Click **Create stage**.
   A stage is a visible area to add content.



4. On the form, fill in the fields.

Dynamic trigger configuration fields

Field		Description
Start date table		The table you want to base your recurring campaign stage to trigger. Choose from: ○ HR profile (sn_hr_core_profile) ○ User (sys_user)

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Field		Description
Start date field		The fields from the table you select to base your recurring campaign stage to trigger. For example, if you are creating a recurring campaign stage for employee birthdays, select the HR profile table and **Date of birth** from this drop-down.
Offset trigger start		Select this check box to trigger your campaign stage before or after the actual trigger start date. For example, if you are creating a recurring campaign stage for employee birthdays, you can trigger the campaign stage 2 days before the employee birthdays and keep the campaign stage active after the employee birthdays. **Note:** Content is not triggered unless the initial trigger is in the past. For example, if you set a yearly recurring trigger on a date in 2024, the content does not trigger until 2024, so the trigger must be set in the past. You can use the Offset trigger start field to pull the initial trigger start date before the current date.
	Date offset quantity	The number of days, weeks, or months to offset the trigger type. This field works with the next fields to determine when content is available. For example, if you want your campaign stage to trigger 2 days before the actual date, enter 2 and select **Days** in the **Date** offset units drop-down.
	Date offset units	Units of time to offset the trigger type.
	When	Whether to offset the units before or after the set date.

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Field		Description
EndDuration type		Defines how long the campaign stage is active. Choose from: ○ **Campaign end date** makes content available until the campaign ends. ○ **Time Length** ends content after a specific number of days or hours. ○ **Dynamic field** uses a trigger table and field to determine when content is no longer available. An example is to end content based on an employee's HR profile and start date.
Include audience members with trigger > **That occurs**		Specifies which audience members can view the content in the campaign stage, based on when their triggering event occurs. Choose from: ○ **Anytime**: Includes all users in the campaign. ○ **During campaign**: Content is only available to users for whom the triggering event occurs after the campaign start date. ○ **After specified**: Content is available only to users for whom the triggering event occurs after a specific date.

5. Click **Submit**.

What to do next

- Click **Add stage** to configure additional stages
- Add content to the stage, specify an audience, and set the location where the content will be delivered. For more information on creating content in the Content Experience Builder, see Add content to a campaign using Content Experience Builder

Create a campaign stage with condition trigger

This trigger is for Employee Journeys.

Before you begin

Role required: sn_ca.campaign_manager

Complete the steps to Create a campaign

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Create a stage with a to-do content item. For more information on this content type, see To-do content.

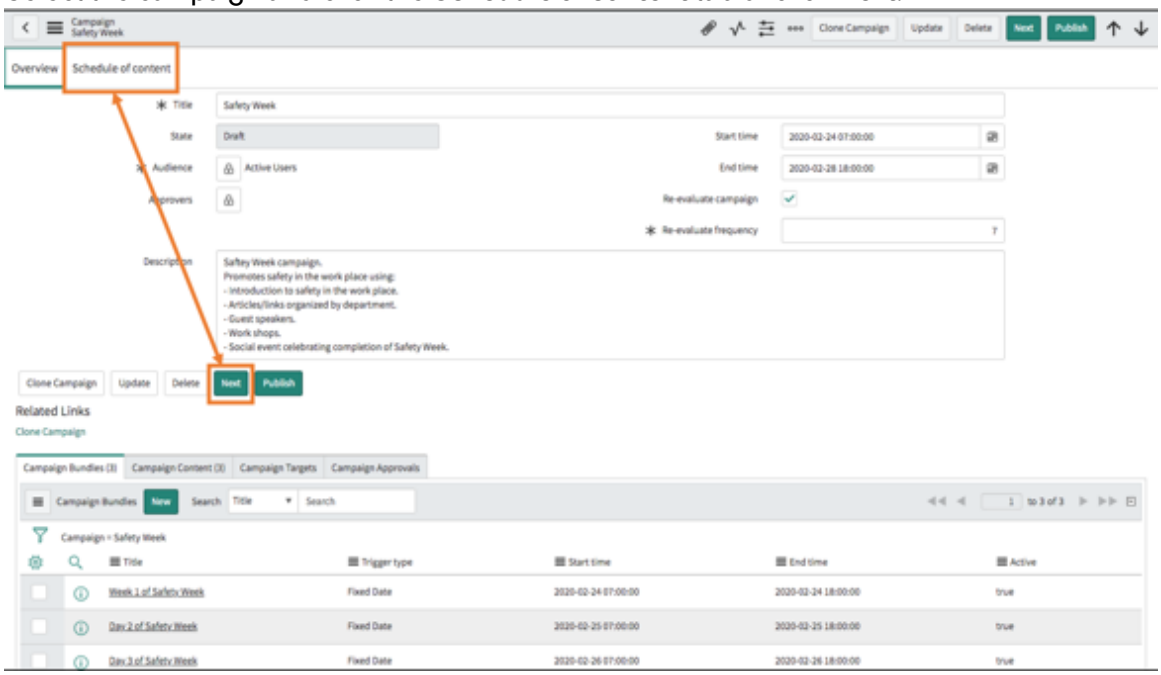
About this task

Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long.

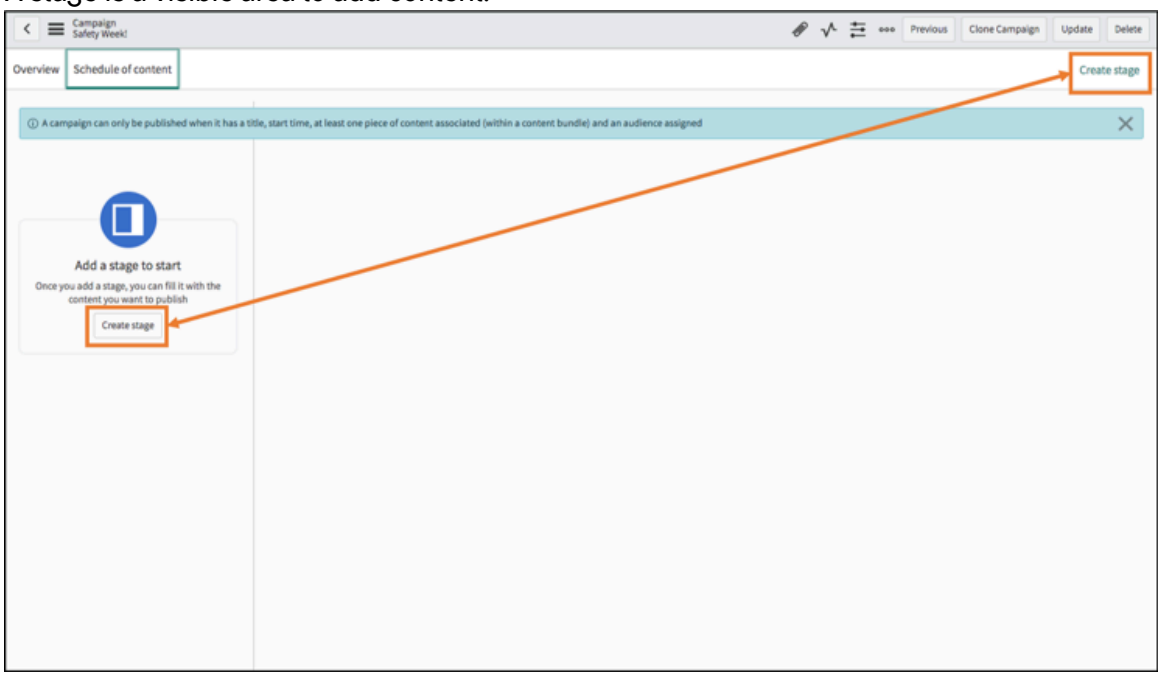
Note: Some parts of the interface use the term "bundles" to refer to stages.

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.



3. Click **Create stage**.
   A stage is a visible area to add content.



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4. On the form, fill in the fields.

Condition trigger configuration fields

Field	Description
Condition table	The table you want to use to create condition triggers for your campaign bundle.
User field	The fields from the table you selected that you want to create a condition that triggers your campaign bundle.
Start condition	Filter conditions based on the table and field you select for when you want the campaign bundle to trigger.
Offset trigger start	Indicates that you want the trigger to start after or before a defined number of days, weeks, or months from the trigger field you selected.
Date offset quantity	The number of date offset units (days, weeks, or months) the trigger date should occur.
Date offset units	The unit of time (days, weeks, or months) the date offset type should trigger.
When	Indicates if the trigger date should be before or after what you select in the trigger field.
End > **Duration type**	Defines how long the content in this stage is available. Choose from: ○ **Campaign end date** makes content available until the campaign ends. ○ **Time Length** ends content after a specific number of days or hours. ○ **Dynamic field** uses a trigger table and field to determine when content is no longer available. An example is to end content based on an employee's HR profile and start date.
End > **Stop condition**	Filter conditions based on the table and field you select for when you want the campaign bundle to stop.

5. Click **Submit**.

What to do next

- Click **Add stage** to configure additional stages
- Add content to the stage, specify an audience, and set the location where the content will be delivered. For more information on creating content in the Content Experience Builder, see Add content to a campaign using Content Experience Builder

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Add content to a campaign using Content Experience Builder

Create or place content into a bundle or stage for a campaign using Content Experience Builder. The Content library holds existing content and is organized by content type.

Before you begin

Role required: sn_ca.campaign_manager

Complete the steps to Create a campaign and Create campaign stages with Content Experience Builder

About this task

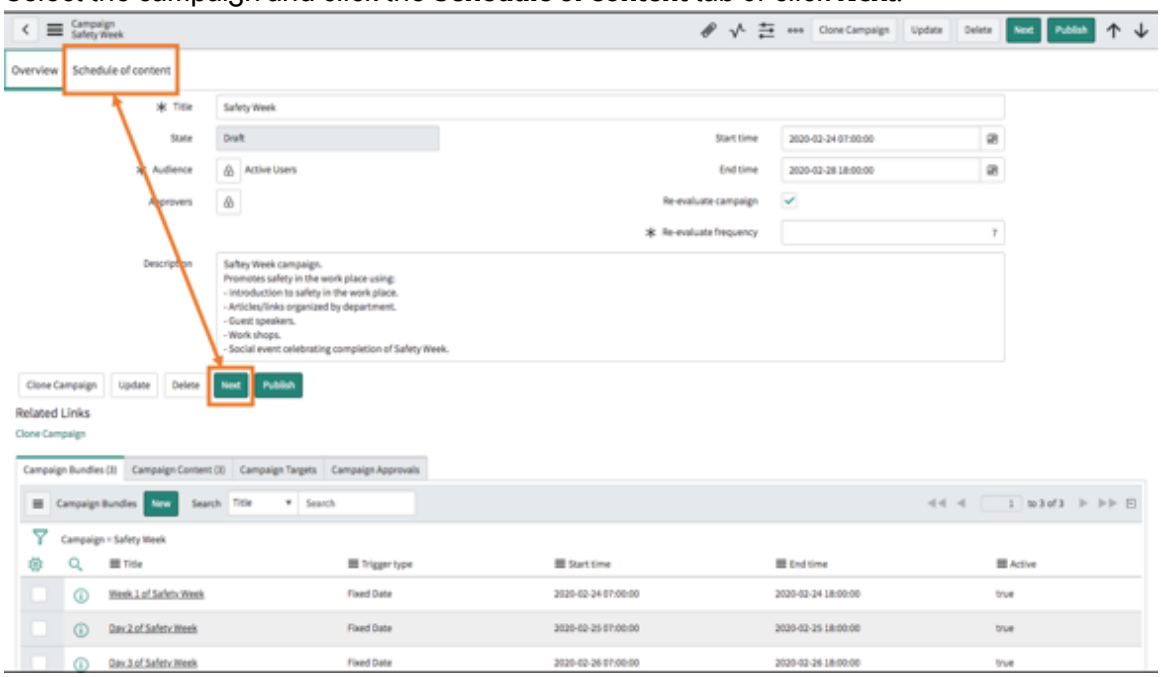
You can add content to the campaign from the Content Library or create new content using the Content Experience Builder.

Note: You must create rich content in the Content Library Rich Content Editor, since the Content Experience Builder does not currently support rich content creation. See Microsites

Procedure

To open a campaign in the Content Experience Builder do steps 1 and 2. If you have already opened the campaign in the Content Experience Builder, proceed to step 3.

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign and click the **Schedule of content** tab or click **Next**.



3. To create new content or select content from the Content library, click the accordion icon ( ) next to a content type.

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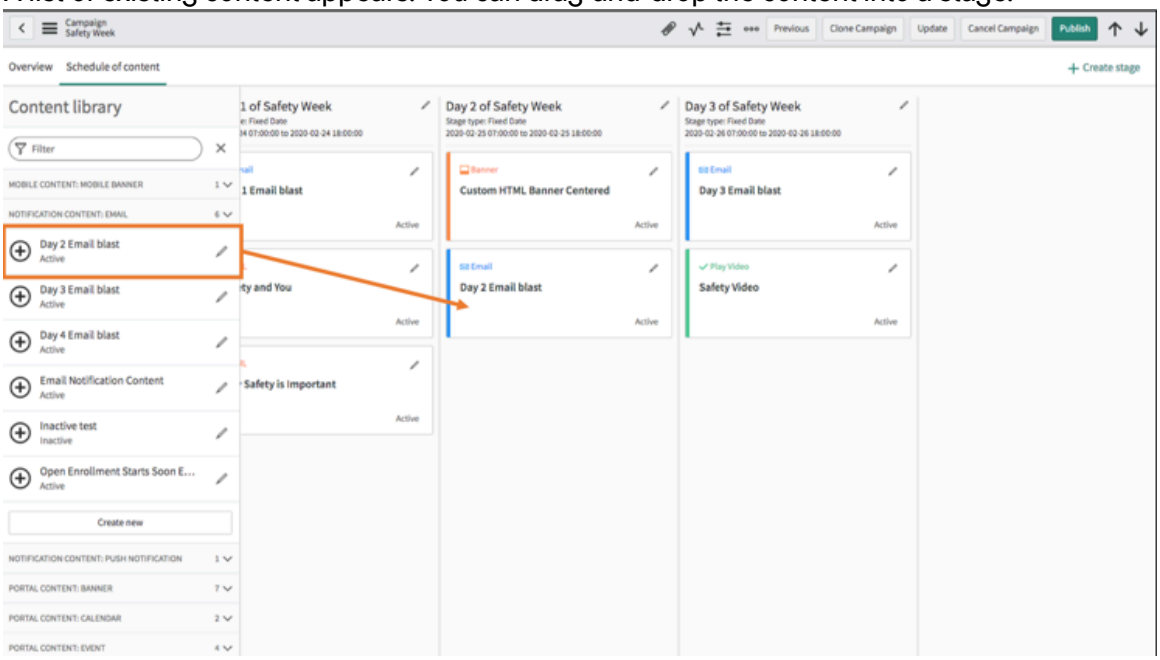
A list of existing content appears. You can drag-and-drop the content into a stage.



You can use the Filter field to search for content by title (for example "Travel policy update") or content type (such as Mobile or Portal content).

Click **Create new** to create new content. For more information on the New Content form fields, refer to the links in the table below:

Content type

Content type	Description
Mobile Content	Announcement banners that you can send to your employee's mobile devices. The banner can be an image that links to your ServiceNow® Employee Center or ServiceNow® Service Portal content. For information on creating mobile content, see Configure mobile content.
Notification Content	Information blast that you send directly to your employees via email or push to their mobile devices. **Note:** Emails sent through campaigns are individually addressed to one user within the campaign, while the remaining users are blind copied (BCC). For information on creating notification content, see Create email, SMS, or push notification content.
Portal Content	Content that appears on your Employee Center or Service Portal.

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Content type	Description
	For information on creating portal content, see Portal content.
To-do Content	Content that assigns tasks to your employees and can be sent via email, SMS, or posted to your Employee Center or Service Portal. For information on creating to-do content, see Create to-do content.

4. Click **Update**.

What to do next

- Continue adding stages and content to the campaign
- Use Campaign preview to see how the campaign will appear to the audience. See Campaign preview
- If you are creating more than one campaign with similar features, use the **Clone campaign** button to clone the campaign, stages, and content.
- When you are ready to publish the campaign, click **Publish**.

Campaign preview

When creating a campaign, you can preview the content prior to publishing it.

Being able to see how your content looks to your audience is crucial to ensuring you have correct messaging and visuals. Campaign preview provides:

- A way to verify that your campaign is error-free from a user, scheduling, and content perspective.
- A method to gain insight and an accurate view into your content and overall campaign.
- A means to preview a single piece of content, a stage, or a full portal view.

Single content preview

Single content preview provides a view of the following content types:

- Banner
- Calendar
- Event
- Rich text (styled content)
- URL
- Video
- Notification
  - Email
  - SMS
  - Push
- To-do (content shown as to-do in the service portal or ESC)

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- Audience the content is targeted to
- Content type
- Stage details the content belongs to

Note: Mobile (with exception to Push and SMS) and community content are not available for preview.

Stage preview

Stage preview provides a view into all content in a stage or bundle of a campaign.

You can also view a specific page (not just your home page if you are presenting content on multiple pages).

For more information, see Preview single content.

Note: Also available in full portal preview.

Full portal preview

Full portal preview provides a view into all content that appears on your portal. There are filters you can use to view:

- A specific stage within your campaign
- Content targeting a specific audience
- A specific page (not just your home page if you are presenting content on multiple pages)

Note: Also available in stage preview.

Only pages with content are available for preview.

Information tags

When previewing your campaign content, a blue outline and information tags shows you what content on your portal is part of your campaign. It also shows additional information about the content like a URL, and what stage the content is part of.

Note: Previews can't be edited.

Content highlight

Content highlighted in blue is active and content highlighted in grey is inactive.

Campaign Preview property

If you have multiple service portals, use the sn_ca.campaign.preview.portal_url_suffix property to select the portal you want to render campaign previews. Navigate to **Content Experiences** > **Configurations** > **Properties** to view this property.

Preview your portal

Use campaign preview to view the campaign content that appears on your portal. Use the Preview filters to fine-tune what you want to preview.

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Before you begin

Role required: sn_cd.content_manager, sn_ca.campaign_manager

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select a campaign.
3. Select the **Portal preview** tab.

   Note: You can also show a portal preview by selecting the show preview icon () from the top of a stage.

4. Use **Preview filters** to determine what you preview.

Preview filters

Filter	Description
Select a stage	The stage or campaign stage/bundle you want to view. Select a specific campaign stage you want to preview the content for.
Refine your audience	The targeted audience for the content in the selected stage. Selecting an audience provides a preview of what content that audience sees.
Select a page	The page on your Service Portal you want to preview. A page is a pre-existing record that contains code and structure that define how to display content you want to schedule and make available to your employees. **Note:** Templates are contained in a topic and references a page. Templates have a direct relationship with a page, but multiple topics can be associated with a template/page. For example, the base system provides the emp_employee-taxonomy page and most of the topics are associated with that page. For more information, see Create topic page template. When a page has topics associated with it, the **Taxonomy** field appears and you can filter by it and you can select topics associated with the taxonomy.
Select a taxonomy	Allows you to filter your preview by taxonomy.

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Filter	Description
	Taxonomy is a collection of hierarchical topics that brings together different content types, like requests, articles, quick links, and employee communications. A taxonomy is the top-level of the hierarchy and can have multiple topics under it. For example, you can have taxonomies for HR and IT so you can group specific topics under each. When you use **Select a page** or **Select a topic** to filter your preview, the value in this field can change because the topic might not be under the taxonomy or on the page you selected. When this field is greyed out, it indicates for the page and topic selected, there is only one taxonomy.
Select a topic	Allows you to preview content associated with a topic. Topics are organized under a taxonomy. When the Allow Ownership for Topics (sn_cd.activate_topic_ownership) system property is set to **Yes** and the topic is assigned to you or a group you belong to, you only see topics assigned to you or topics that do not have restrictions. For more information, see Properties installed with Content Experiences and Assign ownership of content.
Show inactive content	Provides messages in the banner identifying content that is inactive. Toggle switch to green to turn this feature on.

Note: Preview filters that are greyed out indicates the displayed value is the only available selection for preview.

Content highlighted in blue is active and content highlighted in grey is inactive.

5. Exit **Preview filters** to view the portal.

Note: Select the **View content details** ( ) icon to see additional details about the content.

Preview single content

Use the **Schedule of content** tab to view specific content or a stage in your campaign.

Before you begin
Role required: sn_ca.campaign_manager

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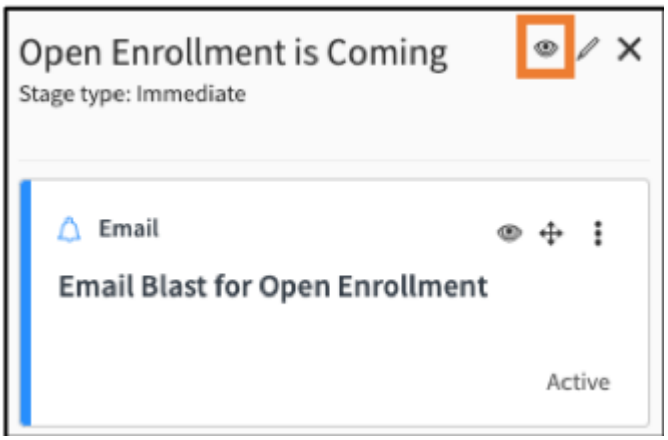
Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select a campaign you want to preview.
3. Select the **Schedule of content** tab.
4. Select the show preview icon ( ) in the content you want to view.
5. Select the show preview icon ( ) in a stage to preview all content for that stage.



6. Close the preview to return to the schedule of content view of the campaign.

Note: When the show preview icon ( ) is gray, a preview is not supported at this time.

Analyzing your campaign for effectiveness

Analyze your campaign to ensure that your messaging is effective and that you are targeting the correct audience when you use campaign success goals. You can also check your campaign's progress and evaluate how successful your campaign is.

Campaigns uses Content Analytics to collect data on user interactions and generate visualizations that help you determine the effectiveness of your campaign. View the data visualizations for published campaigns in the Campaign overview and Campaign analytics dashboards.

Note: Content Analytics is a separate plugin that must be installed and configured. For installation information, see Activate Content Analytics.

Evaluating a campaign

Since many factors can impact how effective a campaign is, define the factors that matter to your campaign. For example, you can configure the Content Experiences: Update Campaign Audience scheduled job to continually reevaluate the audience for your campaign and remove employees that no longer satisfy the criteria that you define. With this process, you can develop campaign targets to help you verify if your intended audience is accurate.

You can define the following factors to make your campaign more effective:

Audience

An audience is a group of users who meet a set of conditions. You define an audience at the campaign level and refine that audience at the content level to control who sees content.

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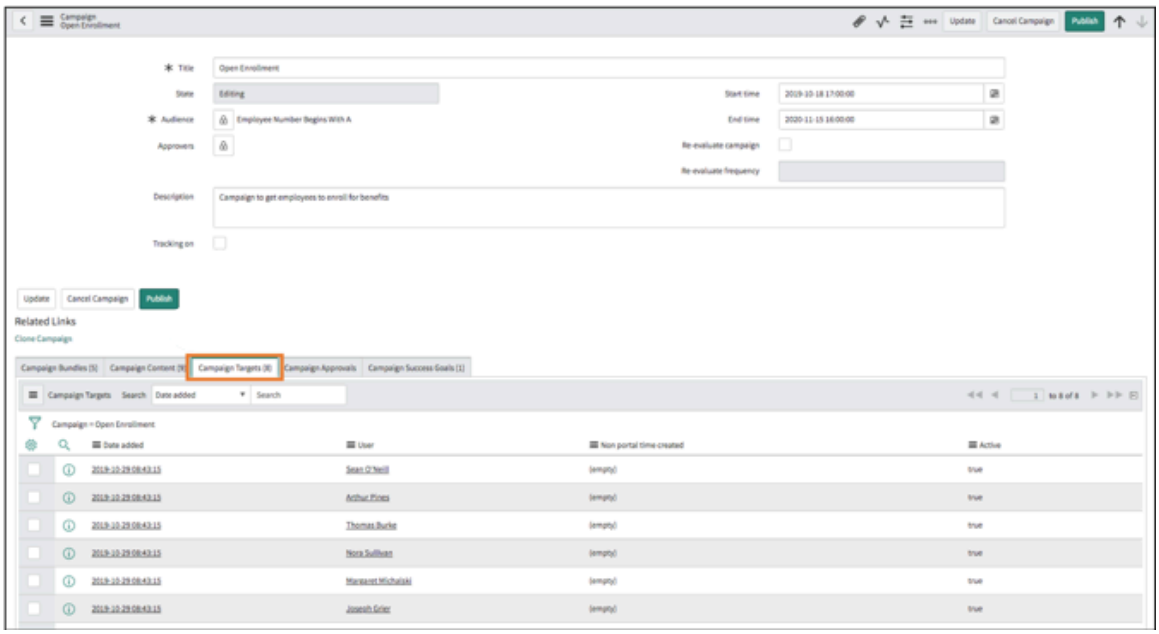
After the campaign starts, the Content Experiences: Update Campaign Audience scheduled job adds or removes users when they meet or no longer meet the conditions. For example, a campaign targets employees of the Engineering department. The scheduled job periodically re-evaluates the audience, adding new hires to the audience and removing users who transfer to another department or leave the company. The campaign content is displayed only to the current employees in the Engineering department.

Alternatively, you can manually modify the audience after your campaign starts. For more information, see Editing a published campaign.

Campaign targets appear after a campaign is published and the Content Experiences: Update Campaign Audience scheduled job runs. You can view a list of the users in the target audience by opening a campaign and navigating to the **Campaign Targets** tab. The campaign target list contains the date the user was added, the user, the campaign the user is assigned, and if the campaign is active.

Click the **Campaign Targets** tab to view the users that you are targeting for your campaign.



Trigger configuration

The trigger configurations determine when the content in a stage becomes available to your employees. The configurations include the trigger type and date offset.

When a campaign starts and employees are added, you can reevaluate the trigger type and dates of a campaign stage. By continually reevaluating the trigger types and dates, you can ensure that the correct audience receives the correct campaign content.

Campaign success goals

Use campaign success goals to set a desired outcome for the campaign, for example driving employees to enroll in benefits or reducing the number of employee-created inquiry cases. If you aren't seeing the results that you expected, you can modify the campaign.

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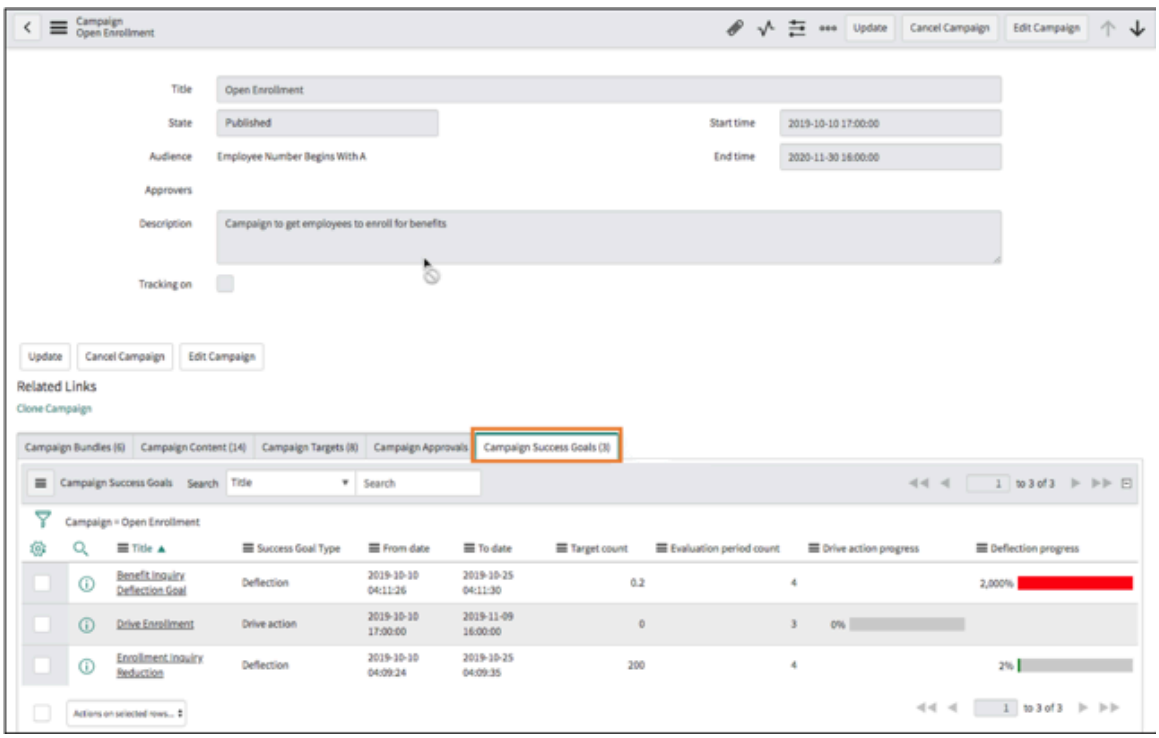
Note: You can create campaign success goals only when the state of a campaign is in Draft or Editing.

Here are some ways that you can utilize campaign success goals:

- Determine if your campaign is successfully driving a specific type of action, like employees signing up for benefits. For example, your company has 2,000 employees and 1,500 have already signed up for payroll direct deposit. You create a campaign that is directed at the 500 employees who have not signed up for payroll direct deposit yet. If your campaign is in the last stage and few employees have signed up, you can add another stage to the campaign with additional content encouraging employees to sign up.
- Compare metrics from your campaign against a previous campaign. For example, the open enrollment campaign last year included a webinar with a question-and-answer session, whereas this year the campaign has an informational video instead. You can review the difference in enrollment rates to determine if the content change had an impact.
- See if your campaign is successfully reducing a type of action. For example, you create a campaign that provides videos, knowledge articles, and links to inform employees about a program. In the weeks after the campaign ends, you compare the number of inquiry cases created before the campaign started to the number of cases created after.



Click the **Campaign Success Goals** tab to view the progress of a campaign. Depending on the type of success goal that you create, you can see a progress chart under Drive action progress or Deflection progress.

You can also select the campaign success goal to view the record.

Create campaign success goals

Create your own success goals to see how your campaign is progressing and learn how to use baselines to compare against your target goals.

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Before you begin

Role required: sn_ca.campaign_manager

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder** and select a campaign.
2. Click the **Campaign Success Goals** tab and select **New**.
3. On the form, fill in the fields.

Campaign Success Goals form

Field	Description
Title	Name of the success goal.
Description	Description of the success goal. **Note:** The title and description help to identify how you are measuring the success of your campaign.
Success Goal Type	How you want to create and calculate your campaign success goal. • Deflection: You want your campaign to inform employees so the number of inquiry cases decreases. • Drive action: You want your campaign to drive employees to create cases, like enrolling in health benefits.
Table	Provides field that the **Success Goal Type** uses to calculate from. You can use to create filter conditions to create specific success goals. **Note:** This field is not editable.
Case date field	Shows the field from the HR Case [sn_hr_core_case] table that the **Success Goal Type** uses to calculate on. After the Content Experiences: Evaluate Campaign Success Goals scheduled job runs, and the first active case that is related to the HR service is created, tracking starts for your success criteria. Use the filters to identify specific conditions you want to track. **Note:** This field is not editable.
Active	Option to activate this campaign success goal.
Filters	Filters that you use to determine your evaluation and target goals.

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Field	Description
	For example, for a Drive Action type, you can set your filters to this condition: • HR service • is • General Benefits Inquiry After selecting your evaluation criteria and target, you can see the number of general benefits inquiry cases that were created and compare it to your target count.

4. Select the **Evaluation Criteria** tab.

Campaign Success Criteria section fields

Field	Description
Evaluation type	How you want to define your campaign data collection. You can select three types: • Target count only: Use this type when you have no historical data to compare your campaign to. This type uses date ranges and a specific **Target value** (see Target tab) to determine campaign success. • Date range: Use this type when you want to compare your campaign data to a past campaign. • Relative to campaign: Use this type when you only want to compare success within the campaign and not compare it to historical data. For example, you can define the type to start 10 days before and after the campaign and view the activity. You can also specify a date that is related to a campaign like Created, Publish time, Updated, and others. **Note:** The fields change based on the evaluation type that you select.
From date	Date that you want the evaluation period to start. The start date can be: • Before the campaign starts. • The start date of the campaign. • Any date after the campaign starts.
To date	Date that you want the evaluation period to end.

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Field	Description
	The end date can be: • After the campaign ends. • The date that the campaign ends. • Any date before the campaign ends.

5. From the **Evaluation type** field, select the **Date range**.
6. On the **Campaign Success Goal** form, fill in the fields.

Evaluation Criteria tab

Field	Definition
Evaluation date range: From date	Date that you want the evaluation period to start. The start date can be: • Before the campaign starts. • The date that the campaign starts. • Any date after the campaign starts.
To date	Date that you want the evaluation period to end. The end date can be: • After the campaign ends. • The date the campaign ends. • Any date before the campaign ends.
Baseline date range From date	Date that you want the baseline period to start. Baseline dates are for past campaigns or any period you want to establish as your baseline to compare against your campaign data. The start date for your baseline can be: • Before the campaign starts. • The date the campaign starts. • Any date after the campaign starts.
To date	Date that you want the baseline period to end. The end date can be: • After the campaign ends. • The date that the campaign ends. • Any date before the campaign ends.

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Field	Definition
	Note: Select the **Calculate baseline** related link to quickly see what your historical data is for the date ranges that you selected. If the calculation doesn't show data, you can expand your date range.

7. From the **Evaluation type** field on the Campaign Success Goal form, select **Relative to campaign**.
8. On the **Campaign Success Goal** form, fill in the fields.

Evaluation Criteria tab

Field	Description
Date offset quantity	Number of days, weeks, or months that you want to collect campaign data before and after the value you select in the **Campaign date** field.
Date offset units	Unit of time measurement that you want to define as your period to evaluate campaign data. The values you can select are: • Days • Weeks • Months
Date offset type	Value that indicates the date offset quantity and units collect data before and after these values.
Campaign date field	Dates or times that are affiliated with a campaign that the evaluation period uses to collect data.

9. Select the **Target** tab.
10. On the **Campaign Success Goal** form, fill in the fields.

Target tab

Field	Description
Target value	Only appears when you select Target count only from the Evaluation type field. The number of cases deflected or created you target for your campaign.
Direction	Identifies the data based on the success goal type that you select. The values are:

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Field	Description
	• Maximize: Drive action • Minimize: Deflection Only appears when you select Date range and Relative to campaign evaluation types.
Percentage	Percentage of cases deflected or created that you target for your campaign.

11. Click **Submit** or **Update**.
    After the Content Experiences: Evaluate Campaign Success Goals scheduled job runs (daily by default), the base count and evaluation period count populates.

View campaign targets

Use campaign targets to view a list of employees that your campaign has targeted, their status, and the date they were added.

Before you begin
Role required: sn_ca.campaign_manager, sn_cd.content_admin

Procedure

1. Navigate to **All** > **Content Experiences** > **Campaign Targets**.
2. Select a published campaign.
   The campaign target list appears with the date the user was added, the user, the campaign the user is assigned, and if the campaign is active.

Create a campaign

Create a campaign to push communications and important information to your employees.

Before you begin
Role required: sn_ca.campaign_manager or sn_cd.content_admin

About this task
Campaigns are organized in a hierarchical structure.

First, you create a campaign defining a title, state, audience, start and end times, and other information. For example, you can create a campaign that promotes open enrollment for health benefits, targeting new hires, and runs through the open enrollment period.

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Click **New**.
3. Fill in the following fields:

Campaign new record form

Field	Description
Title	Unique name for the campaign.
State	State of the campaign. This field is automatically set to draft. After you associate

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Field	Description
	content and stages with the campaign, the **Publish** button will appear.
Audience	Audience that will view the content of a campaign. Click the Unlock Audience icon to select the audience that you want the campaign to target. For more information, see Create an audience. **Note:** After a campaign is in the Published state, you cannot add users. To add new users to a published campaign, click the **Edit Campaign** button. Or, go to the specific content of a campaign and use the **Refine audience** field. For more information, see Create content for a campaign.
Approvers	Users responsible for approving content before the campaign is published. When you click the Lookup using list icon, only users with the Campaign Approver sn_ca.campaign_approver role appear. To send notifications to approvers, select **Publish with Approval**. The approvers receive an email notification that you require their approval. For more information, see Notifications and Email templates. **Note:** If you select **Yes** in the *sn_ca.all_must_approve* property, all approvers must approve before the campaign publishes. If you select **No**, only one approver is required.
Start time (yyy-MM-dd HH:mm:ss)	The date and time that a campaign should launch. **Note:** To publish a campaign, you must define the start date and time.
End time (yyy-MM-dd HH:mm:ss)	The date and time that a campaign should end.
Re-evaluate campaign	Option for reviewing the audience for a campaign. If the box is unchecked, the **Content Experiences: Update Campaign Audience** scheduled job runs one time after which the

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Field	Description
	targeted audience is never re-evaluated or changed. Check the box to display the **Re-evaluate frequency** field so you can define how often you want the **Content Experiences: Update Campaign Audience** scheduled job to run. When your campaign is re-evaluated, it removes or adds users depending on the current audience criteria.
Re-evaluate frequency	The frequency, in days, that you want to re-evaluate the audience. Audiences are re-evaluated after the *Content Experiences: Update Campaign Audience* scheduled job runs based on the value you enter here. This field appears only after you select the **Re-evaluate campaign** check box. This field allows you to override the default (7 days) value that is set in the **Campaign Re-evaluation** field in the Content Experiences system property. For more information, see Properties installed with Content Experiences.
Description	Descriptive information about the campaign.
Tracking on	Option for capturing analytics for your campaign. For more information about campaign analytics, see Content Analytics. This field appears only when a tracking profile is selected from the **Tracking profile** field.
Tracking profile	Tracking profile to use for Content Experiences analytics. Profiles determine what data to capture for campaign analytics. Click the Lookup using list icon and select the tracking profile that you want to use.

4. Click **Save** to remain on the campaign page.

What to do next

Select **Clone Campaign** to copy the campaign, bundles or stages, and content. Cloning saves you time when creating a new campaign if information from the original campaign can be used in a new campaign.

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Select **Next** or the **Schedule of Content** tab to view the **Schedule of content** and access the **Content library**, stages, and content of the campaign.

Select the **Portal preview** tab to show the content you want to appear in your campaign. You can use filters to determine what you want to preview from the portal or single content. For more information, see Preview your portal and Preview single content.

After completing all parts of a campaign, click the **Publish** button.

Note: To start your campaign immediately, ensure the Used to manage whether we want to trigger the campaign publishing process immediately after publishing the campaign (sn_ca.publish.campaign.immediately) sys property is set to **Yes**. This works for campaigns that have a start date and time in the past or the time of publish. Changing this sys property is recommended for campaigns that target less than 100,000 users.

The Trigger Campaign Published Workflow business rule executes and the scheduled jobs are bypassed. The Campaign Targets tab populates with the targeted audience and content is delivered. There are several states that appear after you publish your campaign with the Used to manage whether we want to trigger the campaign publishing process immediately after publishing the campaign (sn_ca.publish.campaign.immediately) sys property is set to **Yes**. The states are:

- Targeting Audience: The audience is in the process of being built/defined.
- Add Non-Portal Campaign Content: Email, SMS, Push, and To-do content are being added and ready to be distributed.
- Delivering Content: The audience and content has been defined and in the process of delivering the content.

The other scheduled jobs related to re-evaluate a campaign and frequency are not affected by this sys property. For more information, see Properties installed with Content Experiences.

Publishing a campaign prior to the start date enables the scheduled jobs to add users to the campaign and create and schedule the content for the campaign.

Campaign Targets show a list of users assigned to a campaign after the *`Content Experiences: Update Campaign Audience`* scheduled job runs.

Note: The **Publish** button only appears when at least one bundle or stage with content is attached to the campaign, a title, and start time. Publishing activates all content for a selected audience and duration.

Create content for a campaign

There are different places you can create content. You can create content from a campaign, bundle/stage, or directly from **Manage Content** under Content Experiences.

Before you begin

Role required: sn_ca.campaign_manager, sn_cd.content_admin

Procedure

1. Navigate to **All** > **Content Experiences** > **Configurations** > **Campaign Content**.
   You can also create content from:
   - The **Campaign Content** related list of a campaign
   - Select **Create new** from the content library column after selecting the  . For more information, see Add content to a campaign using Content Experience Builder.

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Campaign Content

Field	Description
Title	The title you entered from the **To-do content** form. This field only appears when you select content that has a content type of: ○ Button Complete ○ E-Signature ○ Play Video ○ View Link These are all to-do types of content that request the user to complete a task. **Note:** For more information, see Creating employee communications.
Content	The content you want to appear in your campaign. Select the **Lookup using list** icon and select the content from the list. The content you want to select must already be created before you can add it to a campaign. **Note:** For more information, see Creating employee communications.
Due date	Assigns a date when an employee must complete the to-do. Adding a due date allows you to sent a to-do and override the campaign bundle or stage end date. **Note:** Only appears for content that has a to-do content type.
Page	Filters widget instances for the page you select. Select a page and only the widget instances that appear on the page are available in the **Widget instance** choice list. You can open the Page record and select the **Try It** button to view the page. **Note:** Only appears when **Portal Content** or **Styled content** is the content type for content selected.
Widget instance	The Employee Center widget instance. A widget instance is a reference to a widget

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Field	Description
	that contains properties and CSS specific to that instance. A list of filtered widget instances appear when you select a page from the **Page** choice list. **Note:** Only appears when **Portal Content** or **Styled content** is the content type for content selected.
Taxonomy	Filters what topics you can schedule your content to. Taxonomy is a collection of hierarchical topics that brings together different content types, like requests, articles, quick links, and employee communications. For example, you can set up separate taxonomies for HR and IT so you can group specific topics under each. For this field to appear, select a page that has Taxonomy (sn_ex_sp_taxonomy) entered in the Choices tab for the dictionary entry for the Category table of the page. For more information, see Create a table. For more information on taxonomy for the Employee Center, see Unified Taxonomy for Employee Center. For child topics to appear on your Employee Center, you must add it to the Portal form under Service Portal. For more information, see Create a portal.
Topic	The topics you want your content to appear in under a taxonomy. Only topics that are associated with a specific page/template display. When the Allow Ownership for Topics (sn_cd.activate_topic_ownership) sys property is set to **Yes**, topic ownership is enabled. For more information, see Properties installed with Content Publishing. Ownership of a topic includes: ○ Ability to restrict what groups or users can schedule content for publication. ○ Ability to edit content assigned to the topic. ○ Ability to preview content for the topic.

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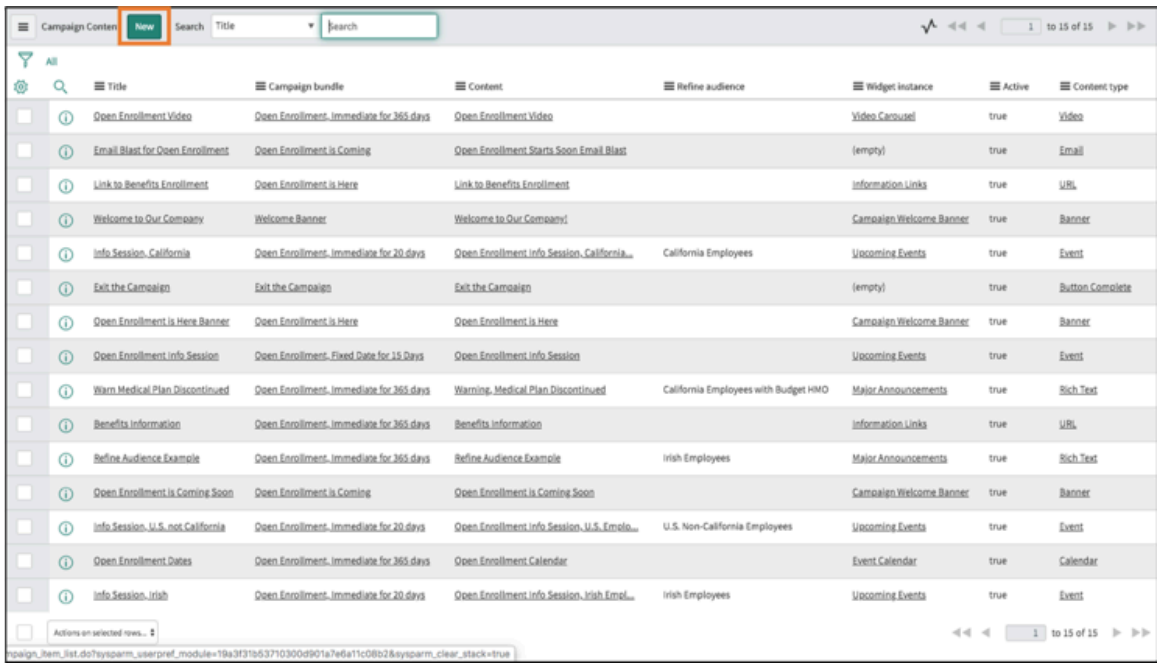
Field	Description
	Note: Other users that have access to the content can view the restricted content assigned to a topic, but cannot edit or delete the topic. For more information, see Content Ownership and Create and associate topics.
End campaign on completion	Removes employees from the campaign after the to-do is completed.
Active	Indicates the to-do content is active and available to use.
Campaign bundle	The campaign bundle or stage you want the content to belong to.
Refine audience	Narrows your audience selected at the campaign level. Selecting an existing audience creates a subset of the original audience.
Description	Description of the to-do content.



2. Click **New**.

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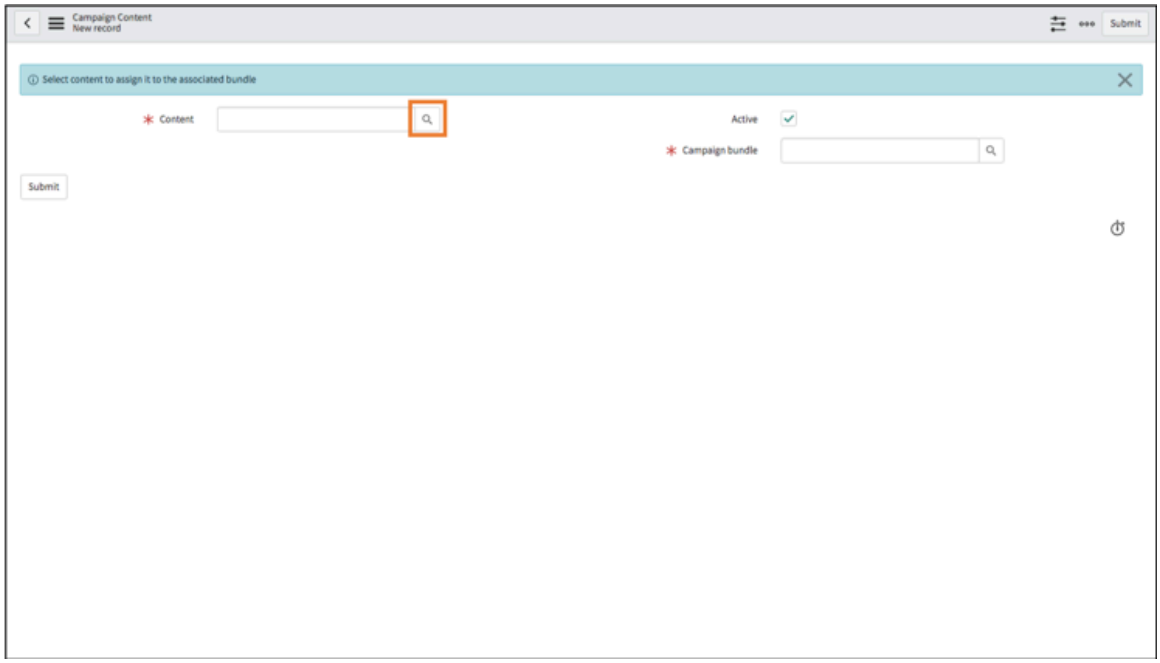
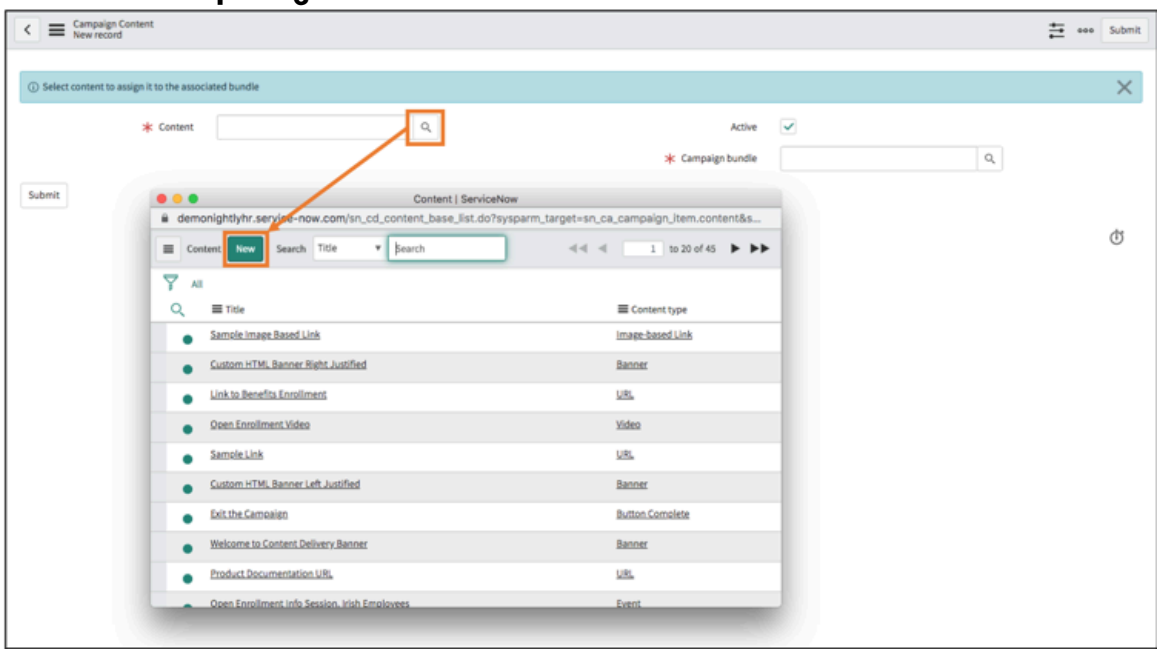


3. Select the **Lookup using list** icon next to Content.



4. Select existing content or **New**.

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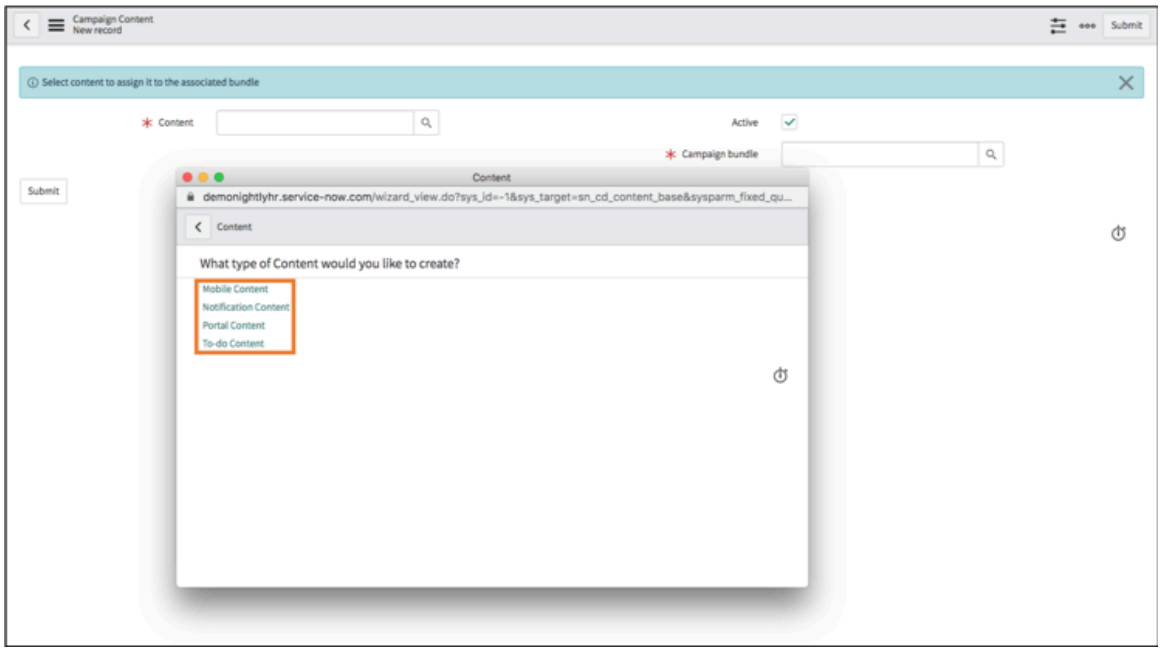

5. Select the content type.

Content type

Content type	Description
Mobile Content	Announcement banners you can send to your employee's mobile devices. The banner can be an image that links to content of your Employee Center or Service Portal. **Note:** For information on creating mobile content, see Configure mobile content.
Notification Content	Information blast you send directly to your employees via email or push to their mobile devices. **Note:** For information on creating notification content, see Create email, SMS, or push notification content.
Portal Content	Content that appears on your Employee Center or Service Portal. **Note:** For information on creating portal content, see Portal content.
To-do Content	Content that assigns tasks to your employees and can be sent via email, SMS, or posted to your Employee Center or Service Portal. **Note:** For information on creating to-do content, see Create to-do content.

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6. Click **Submit**.
7. Right-click the form header and select **Save** to remain on the form.
8. Or, click **Submit** or Update and return to the list.

What to do next

Since you attached your content to a bundle or stage, you can launch your campaign by clicking **Publish** from the campaign. Publish only appears when at least one bundle with content is attached to the campaign, and the campaign has a title and a start time. Publishing activates all content for a selected audience and duration.

After the **Content Experiences: Update Campaign Audience** schedule job runs, the **Campaign Targets** tab shows specific employees that are part of the refined audience for the campaign content.

Click **Edit Campaign** to pause the campaign and make edits to the content, audience, or duration.

Click **Cancel Campaign** to de-activate all undelivered content (including notifications) to a scheduled audience. You cannot reverse this step. Canceling a campaign that has already launched de-activates all undelivered content and you cannot restart it.

Click **Deactivate Content** to remove the content from a campaign. The content does not appear for users who have not yet viewed it.

Create campaign bundles/stages

Use campaign stages to group your campaign content within a campaign. This process allows you to determine when the content is available to your employees and for how long.

Before you begin

Role required: sn_ca.campaign_manager, sn_cd.content_admin

About this task

Stages organize and manage the delivery of campaign content. When configuring a stage, you set the stage trigger, which determines when content becomes available and for how long. To learn more about triggers, see Campaign bundle triggers.

Note: Some parts of the interface use the term "bundles" to refer to stages.

Procedure

1. Navigate to **All** > **Content Experiences** > **Configurations** > **Campaign Stages**.
2. Click **New**.

Campaign Bundle form

Field	Description
Title	The name of the campaign bundle.
Campaign	The campaign associated with the campaign bundle.
Trigger type	How the campaign bundle starts or ends. To learn more about triggers, see Campaign bundle triggers

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Field	Description
Description	Descriptive information about the campaign bundle.

3. Right-click the form header and select **Save** to remain on the Campaign Bundle form.
4. Or, click **Submit** or **Update** and return to the Campaign list.

What to do next

When a campaign is in the Edit state, you can edit the campaign bundles. You can also click **Deactivate Bundle** to remove the bundle from the campaign. Deactivating removes the content from the campaign, but remains viewable for existing users.

When a campaign is in the **Editing** state, you can also add new campaign bundles and campaign content for matching audiences.

Editing a published campaign

If you need to make changes to a published campaign, review this information to understand your options. Editing a campaign pauses the campaign; any content that is not yet available is suspended until the campaign is published again. The campaign, campaign bundles, and campaign content are editable.

Review the section that applies to your situation:

Published campaign editing options

Type of edit	Information
Edit or add new campaign content	Add new content and modify existing content while the campaign is visible to the audience. Click **Edit Campaign**.
Edit campaign stage/bundle	Edit the stage/bundle name and details such as start time. Click **Edit Campaign**. **Note:** You cannot change the trigger type of published campaign bundle.
Add new campaign stage/bundle	Add a new campaign stage/bundle to a published campaign. Click **Edit Campaign**
Add or remove users from the audience	Modify the campaign audience or refine the audience for specific content. Click **Edit Campaign**.
Pause a campaign	Pause a campaign to suspend undelivered content. After you publish the campaign, the changed content is delivered to users who did not see the originally published content. Click **Edit Campaign**.
Cancel a campaign	Cancelling a campaign deactivates undelivered content. Click **Cancel Campaign** from the Campaign page.

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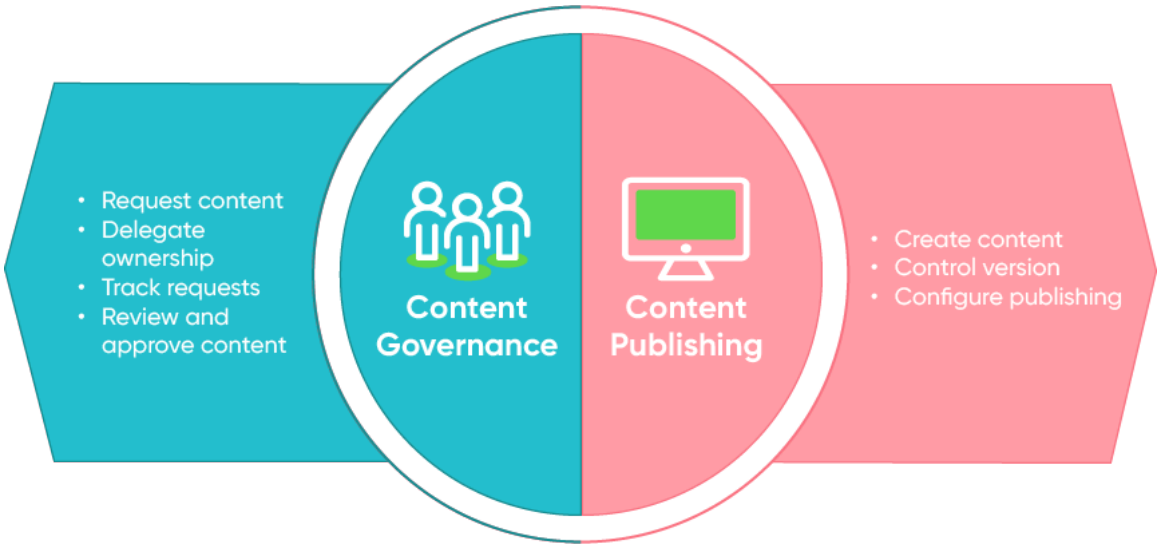
Managing content requests

Content Governance provides a streamlined way for employees to ask for content to be created, track the progress, preview the content, and approve it before it is published.

Content Governance integrates with Content Publishing to provide content managers and admins an efficient way to fulfill and manage content requests. Content managers and admins can view these requests, assign it to a content creator, review the content, approve or make suggestions, and publish the content to make it available to their employees.



Content Governance components

Content request

A content request is a system-generated record that tracks the status of an employee's content request and facilitates the Content Governance workflow.

Content request item

A content request item provides additional details about the content request and the type of content to be created. You can have multiple content request items associated with a content request.

Content request items also provide a status or state of the content being created.

Reviewers

By default, the employee who made the content request is also responsible for approving the content for publishing. The requester or manager can select additional reviewers.

Assignment groups

An assignment group is a group of users that receive the content request. Content Governance includes two assignment groups out of the box: Content Admin and Content Manager, which contain the users with those roles. To configure a new assignment group, see Configure assignment group types

Content request process overview

The following process overview provides a high-level understanding of how employees and content-producing teams use Content Governance.

Step 1: Request content

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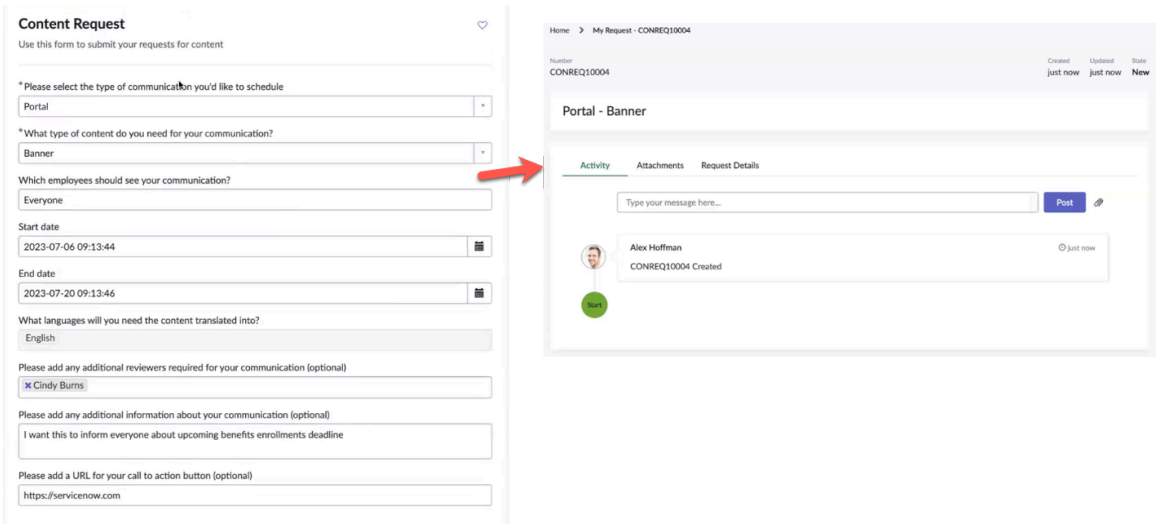
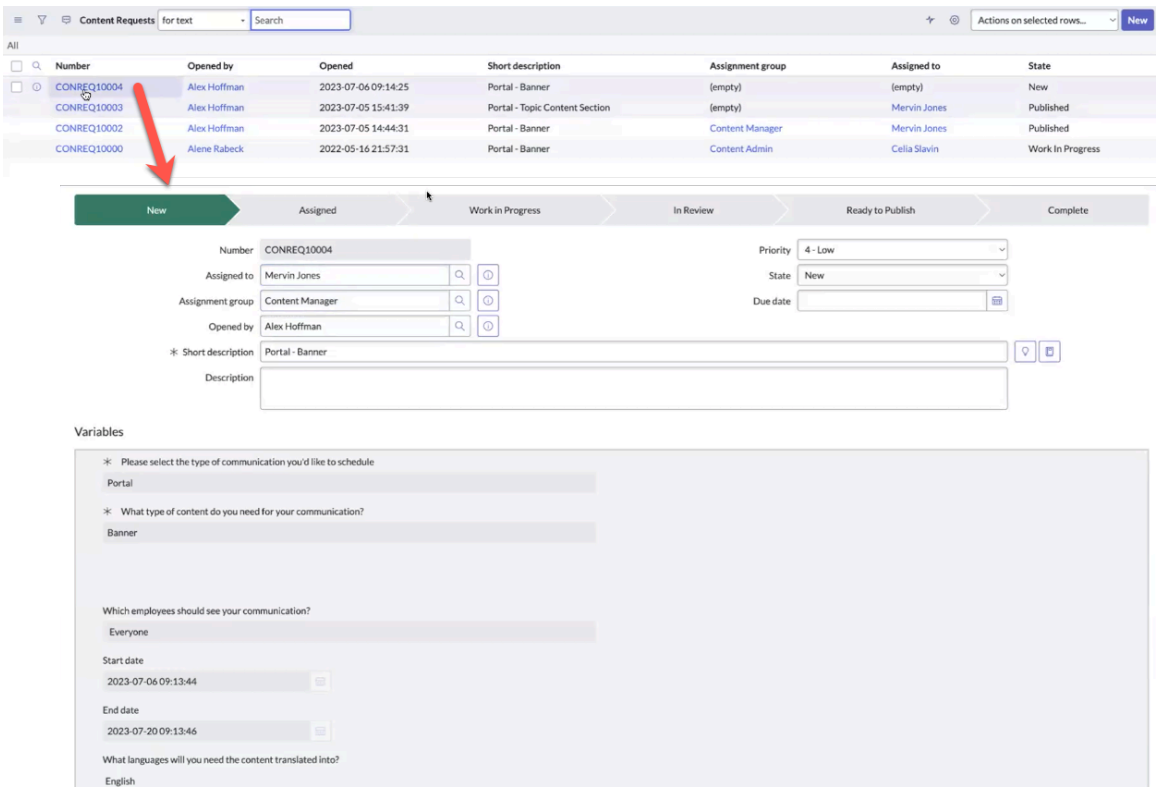
A user fills out the Content Request form, providing details about the needed content. Once the user submits the form, the system creates a content request record, where the user can add comments and attach files.



Requesting content

Step 2: Content request is created and assigned

The content manager opens the content request record to review the request details and assign it to an employee responsible for creating content.



Tracking content requests

Assign content request to content creator

Step 3: Content is created and scheduled

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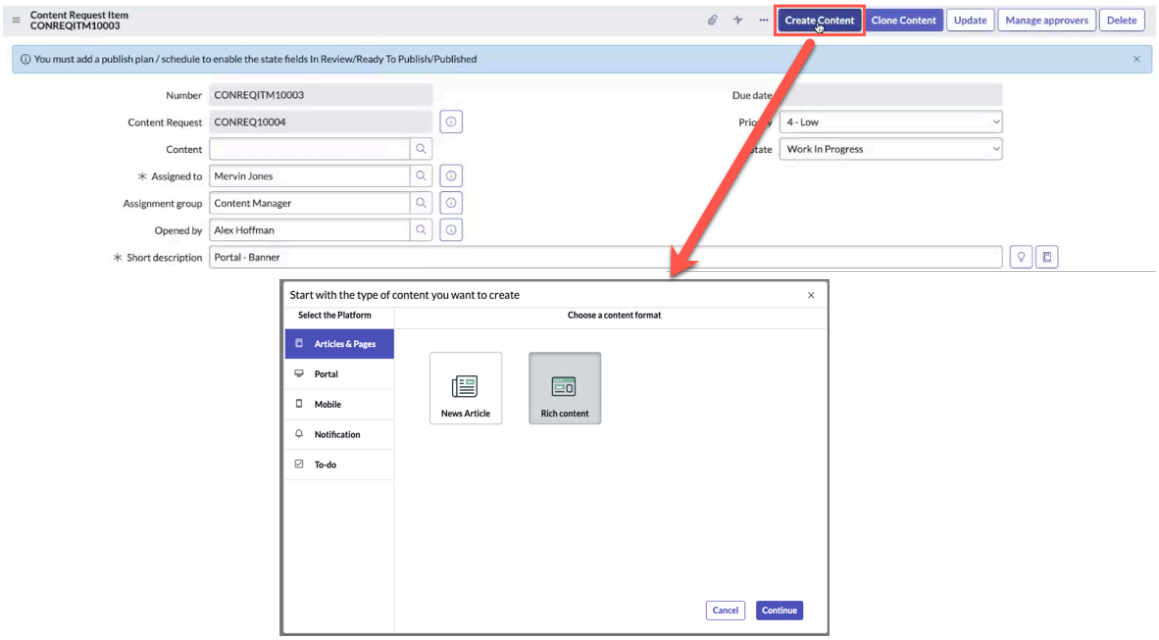
Once the request is assigned to a content manager and the content request is updated to the **Work In Progress** state, the content manager can create content in the content library directly from the request page. This associates the content with the content request for tracking purposes.

Note: Content can only be associated with one content request.

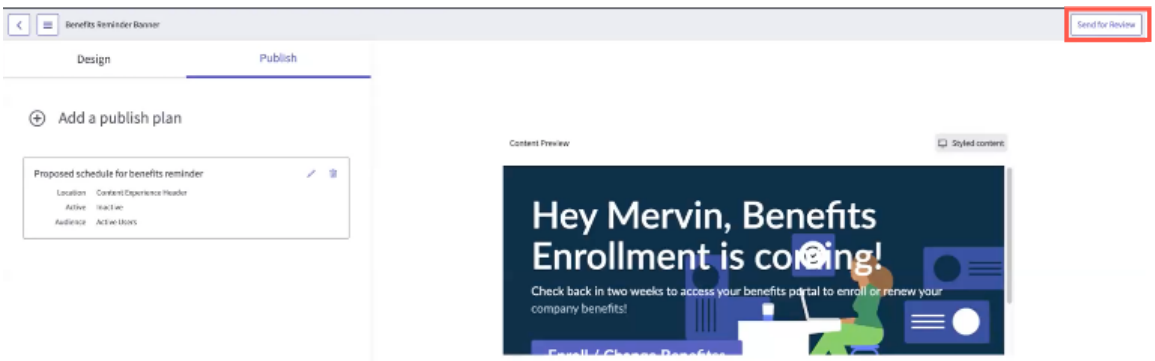


Creating content through Content Governance

Step 4: Content is sent to requester for review

When the content creator is done, they send the content to the requester for review. Content must be associated with a publish plan before it can be sent for review.

Note: Once a Content Request record is in the Review state, the associated content is locked to prevent further editing.



Step 5: Content is reviewed and approved

The requester receives the review request as a new task in their portal and via email notification. The content requester and any additional approvers do the following:

- Review the content

Note: Only rich content, news, and portal type content can be previewed

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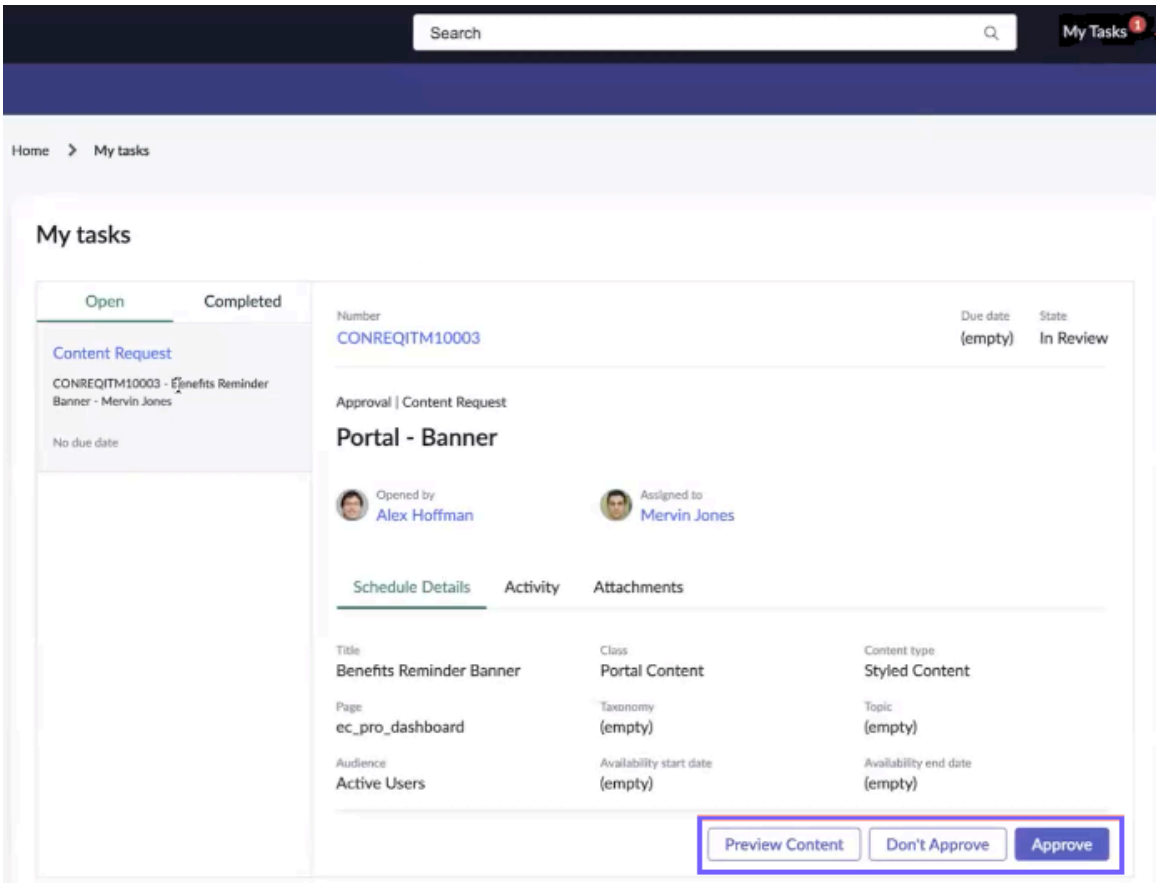
- Suggest edits or changes
- Approve the content



Previewing and approving a content request item

Step 6: Content is published

After the content creator implements any feedback and the content is approved, the content is published based on the configured publish plan.

Requesting content

Content Governance provides multiple ways for employees to request content to be created for employee communications and for your company's content team to clarify the request and assign the request to team members.

Once a content request has been created, Content Governance provides the ability to track the request, review the content created from the request, approve it, and publish it.

There are several ways for your employees to request content to be created:

Employee Center Pro

Employees can use the Content Request catalog item from the Employee Center Pro. Your company decides where on the Employee Center Pro it appears. Any employee that has access to Employee Center Pro can request content.

Service Catalog

Employees can request content from the Service Catalog similar to requesting content from the Employee Center Pro.

Content Request form

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Primarily used by the content team to create a content request when the original request was made verbally or through some other method. The **Content Request** form allows the content team to create the request, then track, review, approve, and publish the content that is created from the request.

Request content from the Employee Center Pro

Employees that have access to the Employee Center Pro can request content to be developed for distribution to other employees.

Before you begin

Role required: none

You can use unified taxonomy to link the request content to a topic so the request can be accessed from the Topic page. For more information, see Unified Taxonomy for Employee Center.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Content Request**.
   Your company decides where on the Employee Center this appears.

   Note: You can also enter **Content Request** from the Search bar.

3. Fill in the fields on the **Content Request** form.

Field	Description
***Please select the type of communication you'd like to schedule**	How you want your content to be communicated. Your choices are: ○ Portal ○ Mobile ○ To-do ○ Other
***What type of content do you need for your communication?**	The type of content you want communicated. The type of content depends on what type of communication you select in the field above. Your choices for Portal are: ○ Banner ○ Video ○ Topic Content Section ▪ What is your desired Topic page? This field appears when you select Topic Content Section. ▪ Enter the topic page you want your requested content to appear in. ○ Other Your choices for Mobile are: ○ Banner ○ Video

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Field	Description
	Your choices for To-do are: ○ Click a button ○ View a video ○ Click a link ○ Sign a document Your choices for Other are: ○ Email ○ SMS Text ○ Other **Note:** The Content Manager should define what it means to select Oth er/Other. For example, it could be used for another type of personal com munication like company chat.
What is your desired Topic page?	Enter the topic page you want your content to appear in. This field only appears when you select **Topic Content Selection** from the **What type of content do you need for your communication** drop-down. For more informa tion, see Dynamic topic pages.
Which employees should see your commu nication?	Who you want your content to be directed to. You can direct your content at all employees or as specific as you want. For example, you may want your content only available to em ployees that work and reside in the US and have different content for employees outside the US. You can also have your content and communi cation target specific employees, groups, divi sions, specific roles, or job titles.
Start date	The date you want you content made avail able.
End date	The date you want your communication to stop.
What languages will you need the content translated into?	The language(s) you want your content to be created in and made available to your audi ence. **Note:** The available languages are de pendent on what your company has in stalled.

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Field	Description
Please add any additional reviewers re quired for your communication (optional)	Click into the field and select people you want to review and approve the content that is created from your request. When approvals are required and the con tent request item is moved to the **In Review** state, the content request appears under **My tasks** for the reviewers and approvers. The content can be previewed, approved, or don't approve.
Please add any additional information about your communication (optional)	Details that can clarify what you want includ ed in the content you are requesting.
Please add a URL for your call to action but ton (optional)	A URL link you want your audience to select if you are requesting to-do, survey, or any type of action content.
Add attachments	Any files that you want to be included in the content you are requesting.

4. Select **Submit**.
   A content request number (CONREQ prefix and sequential number) is generated and what you can use to track, review, and approve the content you requested. You can view your request under the **My Requests**.

Request content using the Service Catalog

Employees who have access to Service Catalog can request content from the Service Catalog.

Before you begin
Role required: none

Procedure

1. Navigate to **All** > **Service Catalog** > **Services**.
2. Select **Content Request**.

   Note: You can also enter **Content Request** from the Search bar.

3. Fill in the fields on the **Content Request** form.

Field	Description
***Please select the type of communication you'd like to schedule**	How you want your content to be communicat ed. Your choices are: ○ Portal ○ Mobile ○ To-do ○ Other
***What type of content do you need for your communication?**	The type of content you want communicated. The type of content depends on what type of communication you select in the field above.

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Field	Description
	Your choices for Portal are: ○ Banner ○ Video ○ Topic Content Section ▪ What is your desired Topic page? This field appears when you select **Topic Content Section**. ▪ Enter the topic page you want your requested topic to appear in. ○ Other Your choices for Mobile are: ○ Banner ○ Video Your choices for To-do are: ○ Click a button ○ View a video ○ Click a link ○ Sign a document Your choices for Other are: ○ Email ○ SMS Text **Note:** Requires integration with Notify. For more information, see . ○ Other **Note:** The Content Manager should define what it means to select Other/Other. For example, it could be used for another type of personal communication like company chat.
What is your desired Topic page?	Enter the topic page you want your content to appear in. This field only appears when you select **Topic Content Selection** from the **What type of content do you need for your communication** drop-down. For more information, see .
Which employees should see your communication?	Who you want your content to be directed to.

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Field	Description
Start date	The date you want you content made avail able.
End date	The date you want your communication to stop.
What languages will you need the content translated into?	The language(s) you want your content to be created in and made available to your audi ence. **Note:** The available languages are de pendent on what your company has sub scribed to.
Please add any additional reviewers re quired for your communication (optional)	Select the **Lock** icon. Next, select the Lookup using list icon. Select people you want to review the content that is created from your request. When approvals are required and the content request item is moved to the **In Review** state, the content request appears under **My tasks** for the reviewers and approvers. The content can be previewed, approved, or rejected.
Please add any additional information about your communication (optional)	Details that can clarify what you want includ ed in the content you are requesting.
Please add a URL for your call to action but ton (optional)	A URL link you want your audience to select if you are requesting to-do, survey, or any type of action content.
Manage Attachments	Any files that you want to be included in the content you are requesting.

4. Select **Submit**.
   A content request number (CONREQ prefix and sequential number) is generated on the **Content Request** form. For more information, see Request content using the Content Request form.

Request content using the Content Request form

The content team uses the **Content Request** form to create a content request when the original request was made verbally or through some other method outside of Content Governance. The **Content Request** form enables the content team to create a content request and then assign, track, review, approve, and publish content.

Before you begin

Role required: sn_cg.content_request_user

When an employee requests content without using the Service Catalog or Employee Center Pro either verbally or another communication method, the **Content Request** form can be used by your content team to enter the request into Content Governance. This allows the content team to track, review, approve, and create a content request.

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The **Content Request** form can also be used by the content team to delegate work to other team members and allow them to track the request and work across the team.

Procedure

1. Navigate to **All** > **Content Governance** > **Create New Request**.
2. Fill in the fields of the Content Request form.

Field	Description
Number	A unique number that identifies the content request. This field pre-fills the content request number and cannot be edited and has a CONREQ pre fix followed by a sequential number.
Assigned to	The person assigned to create the content from the content request. **Note:** After the record is saved, a noti fication email is sent to the assigned to person. If you select an assignment group, the As signed to person must be a member or the se lected group. When you enter an Assigned to person, this person automatically appears as the As signed to person in a Content Request Item. If you leave this field blank, the Assigned to per son on a Content Request Item is also blank.
Assignment group	The group assigned to create the content from the content request. If you select an assignment group, the As signed to person must be a member or the se lected group. **Note:** For more information, see Man When you enter an assignment group in this field, it automatically appears in the **Assign ment group** field for a Content Request Item. You can only enter members of that group to the **Assigned to** field for a Content Request Item.
Opened by	The person who is requesting the creation of content.
Priority	The urgency associated with the content re quest. Your choices are:

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Field	Description
	○ 1- Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low ○ 5 - Planning
State	The status of the content request. ○ New ○ Assigned ○ Work in Progress ○ In Review ○ Ready to Publish ○ Published ○ Cancelled
Due date	The date the request for content should be completed.
Short description	A short description of the content request. The text entered here appears by default in the short description for the content item.
Description	A longer description of the content request with more details.
Work notes	Additional information about the content re quest. Work notes are useful if additional information is required from the requester.
Additional comments (Customer visible)	You can choose to make this information visi ble to the requester by checking the Addition al comments (Customer visible) box.

When a content request is created from Employee Center Pro or the **Service Catalog**, the **Variables** section appears with information entered from those sources.

3. Select **Save** or **Submit**.
   If you select **Save**, your information is saved and the **Content Request** form remains visible and the **Content Request Items** related list appears. For more information, see Edit a content request item. If you select **Submit**, the record is saved and you are returned to the **Content Requests** list.

Discuss

Select to start a sidebar discussion on the proposed content. After selecting this button, the **Start a Sidebar discussion** widow opens. You can add participants to the discussion and enter a brief message that is sent to the discussion participants.

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Edit a content request item

Use the **Content Request Item** form to provide details on what type of content should be created from a content request.

Before you begin

Role required: sn_cd.content_manager

When a content request is submitted via the **Content Request** form or through the Employee Center, a content request item is automatically created and associated with the content request.

You can edit a content request item from the **Content Request Items** related list of a content request. To add more content request items, select the **New** button.

You can also access the **Content Request Item** form by selecting a content request from the **Assigned to Me**, **Unassigned**, or **All Requests** lists.

Procedure

1. Navigate to **All** > **Content Governance** > **My Requests**.
2. Select the content request that contains the content request item you want to edit.
   For more information, see Request content using the Content Request form or Request content from the Employee Center Pro.
3. Select the content request item from the **Content Request Items** related list.
   The content request item is identified by the CONREQITM prefix followed by a sequential number.
4. Fill in the fields on the Content Request Item form.

Fields	Description
Number	A unique number that identifies the content item associated with a content request.
Content Request	A unique number that identifies the content request. This field pre-fills the content request number and cannot be edited and has a CONREQ pre fix followed by a sequential number.
Content	The name of the content to fulfill the content request. Select the **Lookup using list** icon (and select the content that was created to fulfill the content request. For more informa tion on creating content, see Portal content. Once content is selected and you fill in the required fields, you can save the content re quest item and schedule the content to be published. The **Schedule Content** related list appears after saving the record. For more information, see Publishing content.
Assigned to	The person assigned to create the content from the content request.

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Fields	Description
	This field is required to change the state to **Work in Progress**. If you select an assignment group, the **As signed to** person must be a member or the se lected group. **Note:** When a person is entered in the **Assigned to** field for a Content Request, that person is automatically entered into this field when: ○ The **Assigned to** field is empty. ○ The **Assigned to** field is not automati cally entered when: ▪ The **Assignment group** field is differ ent on the content request and con tent request item. ▪ When the **Assigned to** field is manu ally entered on the content request item. Entering an assigned to per son on the content request item does not override the assigned to person on a content request.
Assignment group	The group assigned to create the content from the content request. If you select an assignment group, the As signed to person must be a member or the se lected group. **Note:** For more information, see Man When an assignment group is entered in the **Assignment group** field for a Content Re quest, it automatically appears in this field.
Opened by	The person who is requesting the creation of content. **Note:** When the state of the content re quest item is changed to **In review**, the **Opened by** person receives a notifica tion.
Due date	The date the request for content should be completed.
Priority	The urgency associated with the content re quest. Your choices are: ○ 1- Critical ○ 2 - High

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Fields	Description
	○ 3 - Moderate ○ 4 - Low ○ 5 - Planning
State	The status of the content request. ○ Open ○ Work in Progress: An assigned to person must also be entered to change the state to **Work in Progress**. ○ In Review ▪ After the content request item is sched uled for publication, the content request item should be changed to **In Review**. Adding a Schedule Content record to the content request item is required to change the state to **In Review**. ▪ When the State is changed to **In Review**, a notification is sent to the content re quester and creates a to-do task for the requester. ▪ A notification and a to-do task is also cre ated for any approvers associated with the content request item. ▪ The notification contains the details of the request and a link to a To-do that ap pears in the Employee Center for the Opened by person or the content re quester. In the To-do, there are buttons to preview and review the content. ▪ When the content requester reviews and approves the content, the **Ready to Pub lish** button appears on their **To-dos** page. ○ Ready to Publish ▪ Selecting the **Ready to Publish** button indicates the content requester has ap proved of the content. ▪ Adding a Schedule Content record to the content request item is required to change the state to **Ready to Publish**. ○ Published ▪ After the content request has been set to **Ready to Publish**, the content manager can change the state to **Published**. ▪ After the state is changed to **Published** all content items are scheduled for publi cation and become available to your em

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Fields	Description
	ployees when the availability start date from the **Schedule Content** is reached. ▪ Adding a Schedule Content record to the content request item is required to change the state to **Published**. ○ Cancelled ▪ Cancels the content request item. ▪ All records associated to the content re quest item are retained and can still be re viewed after cancellation.
Short description	A short description of the content request. The text entered here appears by default in the short description for the content item.
Description	A longer description of the content request with more details.
Additional comments (Customer visible)	You can choose to make this information visi ble to the requester by checking the Addition al comments (Customer visible) box.

5. Select **Save** or **Update**.
   If you select **Save**, the Content Request Item form continues to display and you can schedule the content to be published. Selecting **Update** takes you back to the **Content Request** form.
6. To schedule content, select **New** from the **Schedule Content** related list.
   For more information on scheduling content, see Publishing content.

Approvers related list

The **Approvers** related list appears at the bottom of the **Content Request Item** form. A list of approvers appears with their associated state and the **Opened by** person automatically appearing.

Use the **Manage approvers** button to add or remove approvers.

The current state of each approver appears.

- Not Yet Requested: Content is not ready for review.

  Note: This state prevents an approval from appearing in an approver's to-do list until the state is changed to Requested.

- Requested: Approval has been sent to the user. The request appears in an approver's to-do list.
- Approved: Content has been approved by the approver. After approval, the state of the content request item is moved to **Ready to publish**.

  Note: Content managers (sn_cd.content_manager) can override the state manually.

- Rejected: The content is not approved. If comments were added, they appear under the **Comments** column.

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- Cancelled: User was removed as an approver.
- No Longer Required: Approval is no longer required.

Discuss

Select to start a sidebar discussion on the proposed content. After selecting this button, the **Start a Sidebar discussion** widow opens. You can add participants to the discussion and enter a brief message that is sent to the discussion participants.

Create Content

You can create content from the **Content Request Item** form.

Select a person in the **Assigned to** field and change the **State** to **Work in Progress**.

The **Create Content** button appears at the top of the **Content Request Item** form.

Selecting the **Create Content** button takes you to the **Content Library** form where you can select the type of content you want to create. For more information, see Portal content.

Edit Content

You can also change existing content associated with a content request item by selecting the **Edit Content** button.

The **Edit Content** button appears when there is content associated with the content request item and the **State** is **Work in Progress**.

This takes you to the content form. For more information on editing content, see Portal content.

Clone Content

You can also clone content from the **Content Request Item** form by selecting the **Clone Content** button. When you clone content, you are making a copy of the original content and a sequenced number is added to the content name. For example, if **welcome banner** is the name of the content associated with the content request item and you select the **Clone Content** button, the name of the cloned content is **welcome banner (1)**. The original content name and details remain the same.

In order to clone content, all associated scheduled content must first be removed.

The **Clone Content** button appears when the **State** is **Work in Progress**.

Selecting the **Clone Content** button takes you to the content list where you can select content to clone. For more information on editing content, see Portal content.

View Content

You can view content associated with a content request item if it has an associated schedule and the state is:

- In Review
- Ready to Publish
- Published

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> **Note:** When the content request item is in the above states, associated content cannot be edited or cloned.

For more information, see Publishing content.

Manage approvers

Select to add or delete existing content reviewers.

> **Note:** This button only appears for people with the content manager (sn_cd.content_manager) role. The **Opened by** user cannot be removed. The **Opened by** person cannot be removed. A content manager (sn_cd.content_manager) can change the **Opened by** person and then remove the user if the user needs to be removed.

To add an approver, select from the **Users** column and use the right arrow button to move the user to the **Approvers** column. Select **Submit**.

To remove an approver, select from the **Approvers** column and use the left arrow button to move the user to the **Users** column. Select **Submit**.

The **Approvers** related list appears at the bottom of the form and shows all users required to approve the content.

Delete

Select the **Delete** button to remove the content request item.

Tracking content requests

After a content request is submitted, Content Governance enables the content requester, content managers, and content admins to track the status of the request and associated content.

Tracking as the content requester

After submitting a content request, the employee can track the status of the request by navigating to **My requests** and opening the content request. They can

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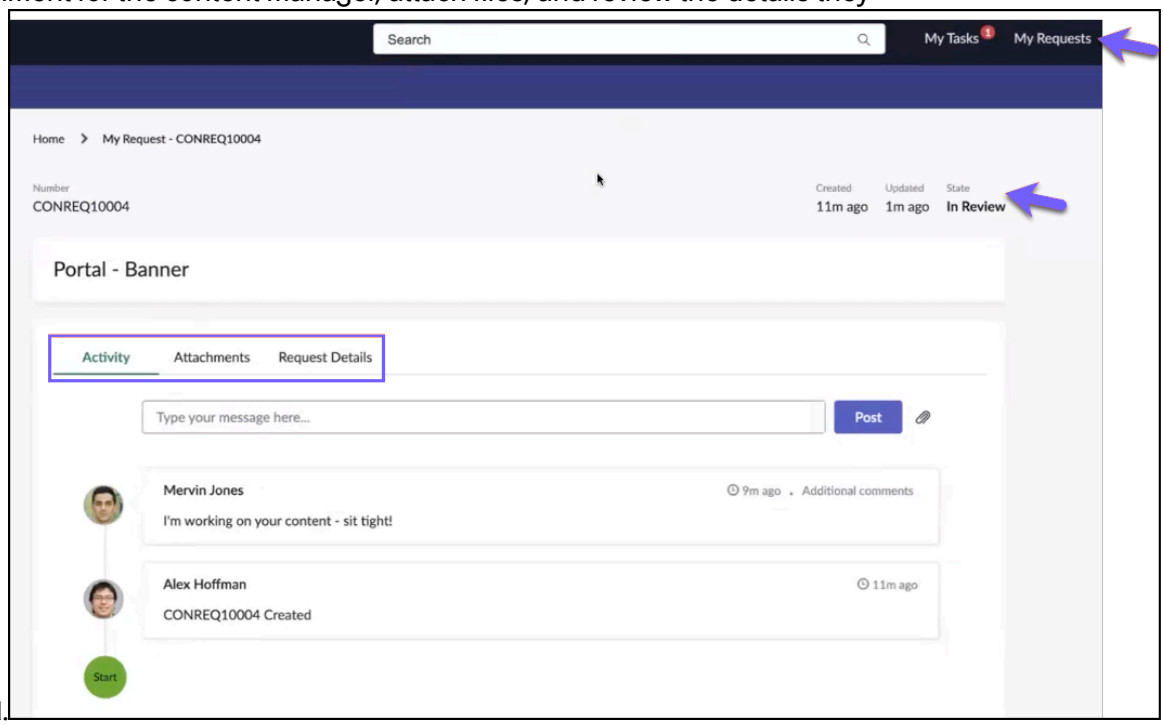
add a comment for the content manager, attach files, and review the details they submitted.



The state field of a content request provides a quick status update to the requester and content team, as well as triggers system actions. For more information, see Understanding content request states.

Tracking as a content manager or content admin

Content managers and content admins can view content requests by navigating to **Content Governance** > **All Requests**. Each time an employee submits a content request, the system creates a record with the prefix CONREQ. This record can be assigned either to an individual content manager or to a group. The record is used for the following purposes:

- Holds the request details, such as the type of content that needs to be created and the intended audience
- Communicate with the employee who made the request
- Holds the associated content once it's created in the Content Request Items list
- Tracks the request status

Content admins and content managers can view all the content requests and associated content, even if they aren't assigned to that record.

Understanding content request states

The content request state provides a quick update on the current status to the employee who made the content request, approvers, and the content team.

The status bar at the top of a content request record displays all the states, with the current state highlighted.



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Content request and content request item states

Content request state	Content request item state	Description
New	Open	Content request was submitted
Assigned	Open	Content admin or manager assigns the request to a content manager or team, and manually updates the state
Work in Progress	Work in Progress	Content manager manually updates the state when they start working on the ticket
In Review	In Review	After the content manager creates the content and publishing plan and clicks **Send for review**, the system updates the state to "In Review" and assigns a task to the content requester and approvers to review the content **Note:** Once a content request item is **In Review**, the content cannot be edited. The content manager must revert the state to "Work in Progress" to edit the content.
Ready to Publish	Ready to Publish	When the requester clicks **Approve**, the system updates the state to **Ready to Publish**
Published	Published	The content manager manually updates the record to **Published** and the content becomes available to employees according to the publish plan configuration
Cancelled	Cancelled	The content admin cancels the request.

Note: Content request items require content and publishing plan in order to change the state to **In Review**, **Ready to Publish**, and **Published**.

For information on how to customize the approval process, see Employee tasks page.

Assign content request to content creator

Assign a new content request to a content manager so they can create the content and a publish plan, then send it for approval.

Before you begin
Role required: sn_cd.content_admin

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About this task
You can assign a content request to a user with the sn_cd.content_manager or an assignment group.

An assignment group is a group of users that receive the content request. Content Governance includes two assignment groups out of the box: Content Admin and Content Manager, which contain the users with those roles. To configure a new assignment group, see Configure assignment group types

Procedure
1. Navigate to **All** > **Content Governance** > **Unassigned**.
2. Click the content request you want to assign.
3. Enter an employee in the **Assigned to** field or select an assignment group.
4. Change the state field to **Assigned**.
5. Click **Update**.

Result
The content request appears in the user's **Content Governance** > **Assigned to me** list.

Add or remove content approvers

A content admin can modify the content approvers list for a request.

Before you begin
Role required: sn_cd.content_admin

Procedure
1. Navigate to **All** > **Content Governance** > **All requests**.
2. Click the content request you want to modify.
3. Scroll down to the content request item related list and select the request item.
4. Click **Manager approvers**.
5. Use the left and right arrows to add or remove users from the approvers list.
6. Click **Submit**.
7. Click **Update**.

Creating content through Content Governance

When a content request item is assigned to you, create and schedule the content, then send it for approval.

Before you begin
Role required: sn_cd.content_manager

Procedure
1. Navigate to **All** > **Content Governance** > **Assigned to me**.
2. Click the content request you want to fulfill.
3. Change the state field to **Work In Progress**.
4. From the top-left menu, click **Save**.
   If you click **Update**, the system returns you to the Assigned to me list and you must reopen the content request.

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5. Scroll down to the content request item related list and select the request item.
6. Click **Create Content**.
   Create and schedule the content in the Portal content.

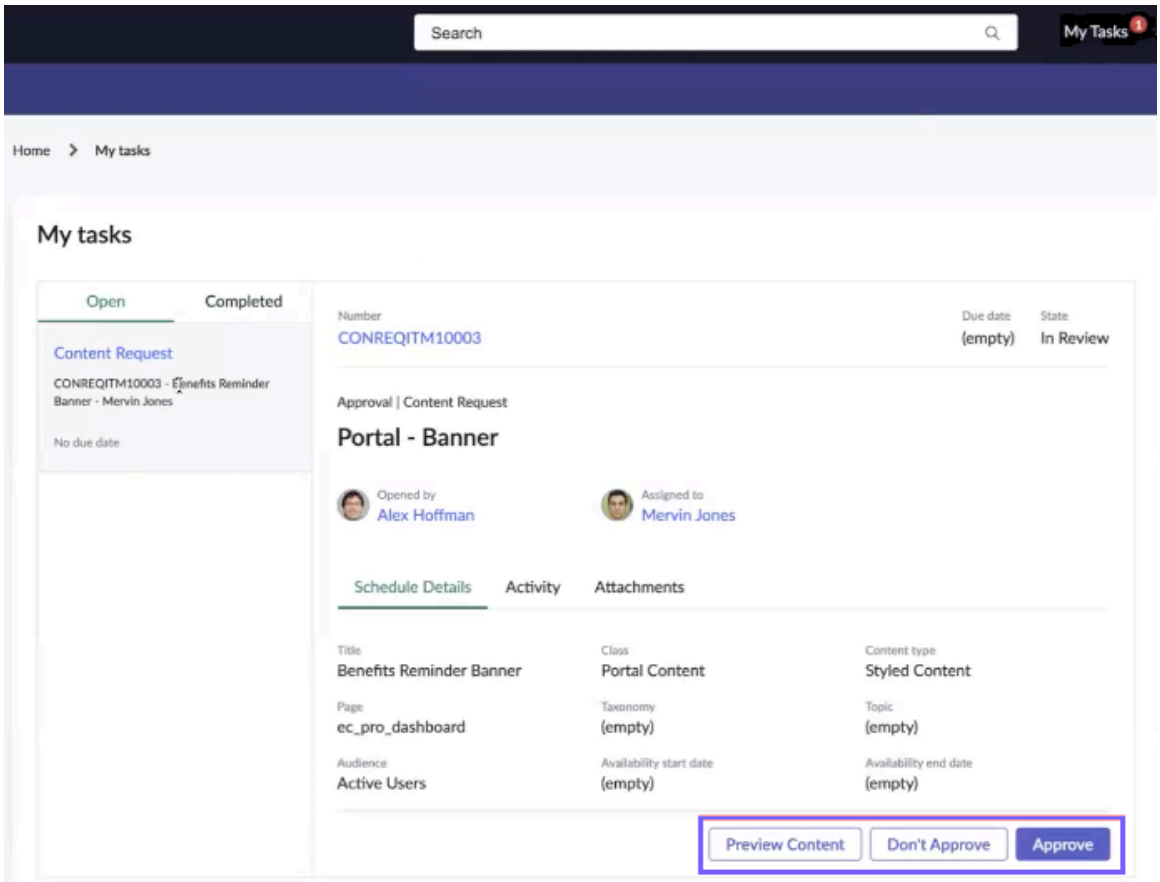
   Note: When you are creating the publish plan, the **Inactive** option is selected by default. When the content is approved, the system activates the publish plan. Alternatively, you can set a publishing duration. However, if you select **Always active**, the content will publish without approval.

7. Click **Send for Review**.
   The system updates the content request status to `In Review`. To edit the content, you must revert the status to `In Progress`.

Previewing and approving a content request item

Content requesters can preview content request items before they approve it to be published.

When a content creator sends the completed content for review, the system assigns a new task to the requester and any additional approvers.



The content requester can preview the content item that appears in a preview portal with the content item highlighted.

Note: Only rich content, news, and portal type content can be previewed.

The portal used for previews is determined by the sn_ca.campaign.preview.portal_url_suffix system property found in **Properties** under Content Experiences Configurations. For more information, see Properties installed with Content Publishing and Properties installed with Content Experiences.

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Email notification

An email notification is sent to the content requester and appears as a to-do under **My Tasks** in the Employee Center Pro. A link is provided to the to-do.

For information on setting up email notifications, see Create an email notification.

Understand the Content Operations dashboard

The Content Operations dashboard is a launchpad for content authors, where they can create content, view engagement metrics for published content, content publishing calender, incoming content requests, and review ownership for pages and widgets.

Dashboard overview

Users with the Content Manager role can access the **My Content Operations** dashboard from Content Publishing, Content Experiences, or Content Governance as their starting point for creating or managing content.

Note: The admin must install the following plugins (August 2024 store release or later) to enable this dashboard:

- Content Publishing
- Content Governance
- Content Experiences (optional)

For more information, see Employee Center plugins.

My Content

The my content tab contains metrics on the content you created. The display may vary depending on the plug-ins in your instance.

My Content cards

Card	Description
My Content	List of all the content you created.
Content Library and Campaigns	Provides a quick view of the status of your scheduled content and campaign content (if the Content Experiences plugin is installed) via the following cards: • **Content to be published**: The number of your content items that are scheduled but not yet published on the portal or Now mobile app. Click this card to open the Schedule content records. • **Content expiring within 7 days**: The number of your content items with a schedule end date within seven days. • **Campaign content to be published**: The number of your content items that are in a campaign bundle. • **Campaign content expiring within 7 days**: The number of your currently-published content items that are in bundles with an end date within seven days.

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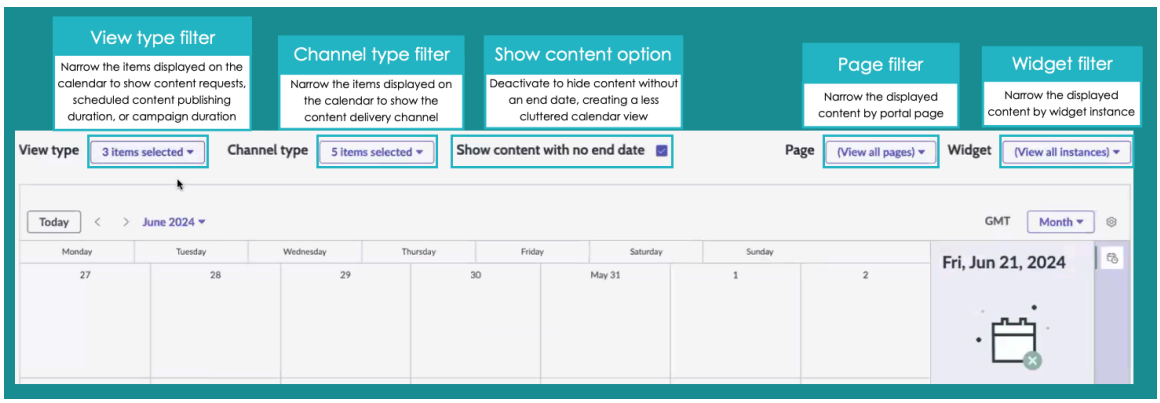
My Content cards (continued)

Card	Description
	Note: The Content Admin can change the number of days for the **Content expiring** and **Campaign content expiring** fields by modifying the Content Governance properties. See Properties installed with Content Governance.
Content requests	Provides a quick view of content requests via the following cards: • **Content requests unassigned**: Incoming content requests that do not have an assigned user. • **Content requests due within 7 days**: Assigned and unassigned content requests with a due date within seven days. • **Content requests in progress**: Content requests that have an associated content item and an **in progress** status. • **Content requests in review**: Content requests that are awaiting approval from the user who requested the content or from additional reviewers. • **Content requests ready to publish**: Approved content requests that have a content item with a content schedule record. **Note:** The Content Admin can change the number of days for the **Content requests due** field by modifying the Content Governance properties. See Properties installed with Content Governance.

Publishing Calendar

The publishing calender provides a single interface where content managers can view what content will be published and where, upcoming campaigns, and content requests by due date.



Calendar filters

Filter	Description
View type	Narrow the items displayed on the calendar to show:

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Calendar filters (continued)

Filter	Description
	• Content requests The Content request appears on the Content request item due date. For more information, see Managing content requests. • Content Library Content appears based on the content schedule record, with the exception of news articles and to-do content, which are explained in the **Channel type** section below. **Note:** The calendar only displays content with configured start date. Content set to "Always active" will not appear in the calendar. • Campaign Content The calendar displays content that is in a published campaign and in a bundle with either an immediate or fixed date trigger. For more information, see Campaign bundle triggers. The content appears in the calendar based on the bundle date, not the campaign start date. **Note:** This option appears only if the Content Experiences plugin is installed. • Campaign Content The calendar displays campaign content based on the bundle trigger configuration. For more information, see Campaign bundle triggers. **Note:** This option appears only if the Content Experiences plugin is installed.
Channel type	The calendar uses different colors to distinguish between channel types, helping you easily differentiate them. Use the filter to narrow the items displayed on the calendar to show specific content delivery channels. • Mobile content • News content displays based on the article publish start date • Notification content • Portal content • To-do content displays based on the **When to process** date
Page	Narrow the displayed content by portal page.
Widget	Narrow the displayed content by widget instance.

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Calendar filters (continued)

Filter	Description
	The drop-down menu displays Content Publishing widgets. For more information, see Employee Center widgets.

Ownership

The ownership tab provides an overview of content, pages, topics, and audience ownership. To learn more about ownership, see Content Ownership.

You can use filters to specify a group or user to view information by:

Group

The drop-down menu for the group filter contains role-based groups (Content admin and Content manager), which include all users with the selected role. These role-based groups are configured at the platform level by a system admin.

User

The drop-down menu for the user filter contains all the users with either a Content admin or Content manager role.

Ownership cards

Card	Description
Owned content	View all the content that you created or have ownership permissions for
Owned pages	View all the content that you created or have ownership permissions for
Owned topics	View all the topics that you have ownership permissions for
Owned audiences	View all the audiences that you have ownership permissions for

Using Employee Center Pro

Employee Center Pro extends the standard Employee Center capabilities and provides additional features. These features are focused on providing a unified information and engagement platform for your employees.

- Use the integrated experience and service feedback

  Enable the Integrated experience and service feedback to create a quick and efficient feedback loop across portals.

- Schedule an appointment

  schedule and manage appointments across multiple business units on the Employee Center Pro portal.

Use the integrated experience and service feedback

The integrated experience and service feedback enables quick feedback sharing across the Employee Center portal.

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You can enable the experience and service feedback drawer widget on all the pages of your portal. It provides a seamless feedback experience for the users.

Experience feedback

You can provide your user experience feedback from the Drawer widget in your portal pages or from the Virtual Agent.

Depending on your portal configuration, the feedback widget might pop-up at regular intervals. You can select **Remind me later** to stop the reminder.

Service feedback

You can share your service experience feedback:

- After raising a Service Catalog item request.
- After accessing a Knowledge Base article.

You can provide your overall user experience for a topic page or any other page on the portal. You can also provide feedback from the Virtual Agent. For more information on how to curate different types of feedback, see Set up the feedback definition.

Along with the rating, available for the service feedback types, you can choose to provide additional comments you may have.

You can choose to stay anonymous and not share your personal information while providing your feedback.

Resolve a feedback task

Resolve a task created from a feedback submitted through the integrated experience and service feedback.

Before you begin

Role required: esc_admin

Procedure

1. Navigate to **Self-Service** > **Employee Center** > **My Tasks**.
2. **Optional:** In the My tasks page, select **Feedback tasks** from the Filter by: options.
   You can select one or more of the following **Feedback task** types:
   - **Experience**
   - **In-Page**
   - **Topic Page**
   - **Workflow**

   Note: The **Task type** filter in My tasks can be enabled from the **To-dos filter categories**.
3. In the **Open** tab, select the feedback task you want to resolve.
   The task details show up on the page including the **Feedback provided by**, **Scaled value**, and **Feedback definition** type.
4. Select **Skip** or **Resolve and complete** to close an open feedback task.

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Selection	Action
Skip	The feedback task is skipped.
Resolve and complete	The feedback resolve and complete window open to suggest steps to complete the task.

5. On the Resolve and complete window, fill in the fields.

Resolve and complete form

Field	Description
Do you want to notify the feedback provided?	Option to send a notification email to the feedback provider. This field is visible when the feedback provider shares personal information while submitting the feedback.
Provide a resolution (the feedback provider will see this)	Comment box to provide a resolution.

6. Select **Resolve and complete** button to submit the solution and mark it as complete.
7. **Optional:** Go to the **Completed** tab to view your completed feedback task.
   You can use the **Feedback tasks** filter option to view both your open and completed tasks.

Note: A feedback notification is sent to the feedback provider when it's resolved. For more information, see Feedback task notification.

Feedback task notification

Feedback task notification is sent to the feedback provider once the resolution is provided.

A notification email is sent to the Feedback provider when a Feedback task is marked as **Resolved and completed**.

Feedback email notification

The notification email contains the date and time of the Feedback provided, any Feedback response added with it, and the resolution details.

Schedule an appointment

Schedule a virtual or in-person appointment by selecting a reason and providing your contact information.

Before you begin

Role required: none

Procedure

1. You can schedule an appointment from the following entry points.
   Some entry points might not be available based on the configuration set by the admin.

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Entry Point	Steps to schedule appointment
Employee Center	○ On the landing page, select **Schedule Ap pointment** from the **Quick Links** section. ○ On the landing page, select **Appointments**, then select **New appointment**. ○ In the **Human resources** menu, in the **Quick links** section, select **Schedule ap pointment**.
Employee Center Pro Kiosk	In the **Get support** section, select **Schedule appointment**.
Knowledge Base article	At the end of the article, select **Schedule an appointment**.
Request details	From the Actions menu, select **Schedule an appointment**.
My tasks page	**a.** Select a task. **b.** In the task details pane, select **Schedule ap pointment**.
ITSM Walk-up Experience	While scheduling a walk-up, select **Schedule appointment instead**.

2. On the Appointment type page, select **Schedule appointment**, then select **Continue**.
3. On the Schedule appointment form, fill in the fields.
   For a description of the field values, see Schedule appointment form

   Note: Some fields might not be available based on the configuration set by the admin.

   .
4. Select the check box to agree to receive messages and updates about your appointment.
5. **Optional:** Select the check box to update the contact information in your profile.
   This is applicable if the contact information you provided is different from the information in your profile.
6. **Optional:** Enter additional details about your appointment.
7. Select **Schedule appointment**.

Manage your appointments

Update or cancel upcoming appointments or provide feedback for completed appointments.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From **My active items**, select **Appointments**.
3. **Optional:** Select an **Appointment category** and **Appointment state** to filter the list of appointments.

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4. **Optional:** Select an appointment to open the Appointment details page.
5. From the context menu, select an option based on your requirement.

Note: You can perform these actions from the Appointment list page or the Appointment details page.

Choice	Action
Cancel	The **Cancel appointment** window opens. You can cancel the appointment by selecting **Yes, cancel**.
Update	The Schedule appointment page opens. The fields are pre-filled with the appointment de tails. You can edit the details and reschedule the appointment. For more information about scheduling an ap pointment, see Schedule an appointment.
Give Feedback	The **Give feedback** window opens. You can select a rating and provide additional com ments. This option is available only if the appoint ment state is **Complete**. You can only give one feedback for an appointment. For more information about providing feed back, see Use the integrated experience and service feedback.

Employee Center Pro reference

Reference topics provide additional information about the lists and forms that you use to configure and manage Employee Center Pro.

Block content form

Block content form

Block content fields

Fields	Description
Name	Name of the block content. The name is what you select when you pull in block content for a community blog.
Allow personalization	Enables the use of variables taken from either the HR Profile or Sys User tables to personalize your content.

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Block content fields (continued)

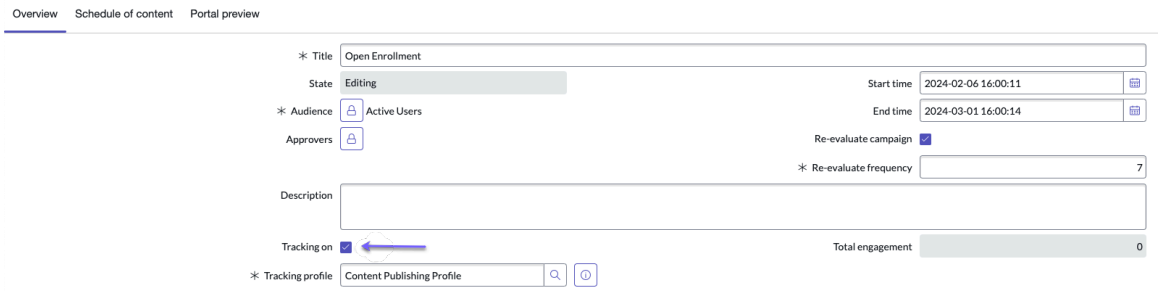
Fields	Description
	Select the box and **User reference table** appears.
User reference table	Determines the variables you can use to personalize text for the block content. Select **HR Profile** to select variables from the sn_hr_core_profile table. Select **User** to select variables from the sys_user table.
Select variables	Displays variables dependent on the table selected in **User reference table**. Variables pull information from the selected table to personalize the block content.
Rich text	Text that comprises the block content. To insert variables, place your cursor in the desired location and click the variable. Use the formatting tools to apply formatting options such as bold, italic, underline, and font styling.

Campaign overview and Campaign analytics dashboards

Content Analytics collects data on user interactions and generates visualizations to help campaign managers determine the effectiveness of campaigns.

Use Content Analytics to measure the effectiveness of a campaign and the content provided to your employees. Content Analytics is one of several resources to help you improve your campaigns. To learn about the other resources, see Analyzing your campaign for effectiveness.

When tracking is enabled for a campaign, Content Analytics generates data visualizations. For more information on how to enable tracking, see Create a campaign.



Note: We recommend waiting at least 24 hours after publishing for data to appear on the dashboards.

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Interaction tracking

Dashboards display data visualizations for specific parameters, such as user interactions with content.

Note:

- An interaction is an action performed by the user, such as a download, link click, to-do completion, or video play.
- An impression is an instance of content appearing for a user. Each time a user views the content, it is counted as an interaction.

Content Analytics tracks the following user interactions (depending on content type). When content is rendered in the portal, the system counts that as an impression. When an employee clicks on content, the system counts that as a clickthrough, download, or played (depending on the content type).

- Banner clickthrough
- Banner impression
- Calendar download
- Calendar impression
- Email clickthrough
- Event download
- Event impression
- Image-based link clickthrough
- Image-based link impression
- Link clickthrough
- Rich content clickthrough
- Rich content impression
- To-do completion
- To-do impression
- Video impression
- Video played

Campaign overview dashboard

The Campaign overview dashboard displays performance metrics by campaign, including tasks closed and user actions.

Campaign performance metrics

Visualization	Description
Open Campaign Tasks	Number of tasks in each state by campaign. The value in each cell links to a list of the tasks in that state and campaign.
Campaign Task Closures This Week	Stacked bar chart that shows the number of tasks that were closed this week. Mouse over a bar to see metrics specific to a campaign.

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Campaign performance metrics (continued)

Visualization	Description
Event Activity Over Time	Total number of user interactions with content.
Events Over Time by Content	Number of user interactions with content, where each line represents a piece of content. Mouse over a line to see metrics specific to a piece of content.
Events Over Time by Action	Number of user interactions with content, where each line represents a type of interaction. Mouse over a line to see metrics specific to a type of interaction.
Action Activity	Pie chart that shows the proportions of each type of interaction and impressions compared to the total number of actions.
Top Content	Bar chart showing the most accessed content. Clicking a bar shows metrics for the specific content and action.
Top Notifications	Bar chart showing the most clicked email notifications during the campaign.

Campaign analytics dashboard

The Campaign analytics dashboard displays data on campaign engagement, to-dos, and impact. Use filters to specify the metrics to include in the visualizations. Choose from **Campaign** and **Campaign Success Goal**, then specify which campaign or campaign success goal.

Campaign Engagement tab

Visualization	Description
Campaign info	Displays the campaign title and audience
Days running	The start and end dates of a campaign and the total days the campaign has run to date
Total engagement	This metric provides statistics on how many employees are interacting with the campaign. It shows the percentage of campaign targets who have visited the destination portal and have engaged with content by clicking or viewing. Those campaign targets who have never been to the portal are not part of this calculation. **Note:** Currently, email link clicks are tracked as anonymous and do not affect the campaign engagement score.
Event activity over time	Total number of user interactions with content.
Events over time by content	Number of user interactions with content, where each line represents a piece of content.

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Campaign Engagement tab (continued)

Visualization	Description
	Mouse over a line to see metrics specific to a piece of content.
Events over time by action	Number of user interactions with content, where each line represents a type of interaction. Mouse over a line to see metrics specific to a type of interaction.
Action activity	Pie chart that shows the proportions of each type of interaction and impressions compared to the total number of actions.
Top content	Bar chart showing the most accessed content. Clicking a bar shows metrics for the specific content and action.
Top notifications	Bar chart showing the most distributed notifications during the campaign.

To-dos tab

Visualization	Description
All campaign to-dos	Shows campaign data in a bar chart for the last 12 months for to-dos by state. • Closed complete • Closed incomplete • Open

Campaign impact tab

Visualization	Description
Campaign impact	Campaign impact shows data related to your established campaign success goals. For more information on creating campaign success goals, see Create campaign success goals. Select a campaign success goal to view a chart that shows how your campaign is progressing. The campaign impact chart shows: • Evaluation count: Shows current data during campaign duration. Use this information to compare against your baseline and target count shows how your campaign is progressing. • Baseline count: Shows historical data based on past, similar campaigns.

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Campaign impact tab (continued)

Visualization	Description
	• Target count: The count you hope to reach when no historical data is available. • Trend: Depends on how you set your campaign success goal type. If you select Deflection, your trend should point down. If you select Drive action, your trend should point up. • Forecast Evaluation Count: Shows how close the campaign is to the target count and when it might be reached.

Components installed with Employee Center Pro

Several types of components install with the activation of the Employee Center Pro plugin, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Employee Center [com.sn_hr_service_portal] plugin activates the sn_hr_sp.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Employee Center admin user by requiring a minimum number (default is two) of active users with this role.

Tables installed

Tables installed

Table	Description
EC Portal Configuration [sn_hr_sp_esc_portal_config]	EC portal configuration table.
To-dos Configuration [sn_hr_sp_todos_config]	To-dos configuration table.
To-dos Widget Mapping [sn_hr_sp_todos_widget_mapping]	To-dos widget mapping table.

For further information on table administration and how to manage data, see Table administration.

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Widgets installed

Widgets installed

Widgets installed

Widget	ID	Description
App Launcher	app-launcher	Appears on the home page to provide one-click access to recently-used applications and favorites.
Complete feedback task	complete-feedback-task	
Dotted Managers Org Chart	dotted-managers-org-chart	
EX Feedback Survey	ex-feedback-survey	Provides the survey feature in the portal.
Experience Feedback Drawer	experience-feedback-drawer	
Experience Feedback Header Item	experience-feedback-header-item	Provides a header menu for the Experience feedback functionality in Now Mobile®.
Experience Feedback Header Wrapper	experience-feedback-header-wrapper	
Experience Feedback Mobile	experience-feedback-mobile	
Experience Feedback Modal	experience-feedback-modal	
Experience feedback rating	experience-feedback-rating	Drives the presentation logic of the feedback ratings.
Experience Feedback Wrapper	experience-feedback-wrapper	
Experience Flow Feedback	experience-flow-feedback	
Experience Workflow Feedback	experience-workflow-feedback	Drives the feedback workflow.
Feedback to do details	ex-feedback-to-do-details	
MESP Feedback Wrapper	mesp_feedback_wrapper	
Organization Chart (EC)	org_chart	Displays the employees organization chart, the relationships to other employees, and more.
Rating Emoji Feedback	rating-emoji-feedback	Captures feedback through emojis.
Rating Numeric Feedback	rating-numeric-feedback	Captures numeric rating feedback.
Rating Star Feedback	rating-star-feedback	Captures 5-star rating feedback.
Rating Thumb Feedback	rating-thumb-feedback	
Skip feedback task	skip-feedback-task	

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Widgets installed

(continued)

Widget	ID	Description
Web Applications	web_applications	Provides one-click access to applications assigned to the user.

Components installed with Content engagement

Several types of components are installed with activation of the Content engagement plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

For more information about tables, see Table administration.

Roles installed

Roles installed

Role title [name]	Description	Contains roles
Engagement Admin [sn_ce.admin]	Configures the reactions	None

Components installed with Content Experiences

Several types of components install with the activation of the Content Experiences [sn_cd] plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

For more information about tables, see Table administration.

Demo data is available for this feature.

Note: The Content Experiences [sn_cd] plugin activates the sn_ca.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Content Experiences admin user by requiring a minimum number (default is two) of active users with this role.

Roles

The following roles are included when you install the Employee Center application (sn_ex_sp):

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Roles

Role title [name]	Description	Contains roles
Campaign Approver [sn_ca.campaign_approver]	When configured, can approve content for a campaign. Requires approval before a campaign publishes.	Content Approver [sn_cd.content_approver]
Content Admin [sn_ca.campaign_admin]	Grants access to all Content Experiences information and privileges. Can create, configure, administer, and schedule campaigns. Can access read and write records to the Content Experiences tables. Can use an analytics tracking profile with a campaign. **Note:** Does not inherit Content Delivery Analytics Admin [sn_cda.analytics_admin] role to set up tracking profiles.	Content Experiences Manager [sn_ca.campaign_manager]
Content Manager [sn_ca.campaign_manager]	Provides access to all Content Experiences content. This includes: Creating and scheduling content for the Employee Center and campaigns.	• Campaign Approver [sn_ca.campaign_approver] • sn_esign.config_manager • sn_cda.analytics_reader • sn_cd.content_approver

Scheduled jobs installed

Scheduled jobs installed

Scheduled job	Description
Content Experiences: Add Non-Portal Campaign Content	Creates sn_ca_campaign_item_user_records for sent emails. It does not send the email. Runs every four hours by default.
Content Experiences: Calculate Campaign Engagements	Calculates the total number of actionable engagements (videos viewed, links clicked) recorded divided by the total number possible with an engagement percentage. Runs on a designated repeating interval.

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Scheduled jobs installed (continued)

Scheduled job	Description
Content Experiences: Campaign Success Criteria	Populates the base count and evaluation period count. Runs the evaluation criteria set up for a campaign. Takes the success goals from published or finished (end date has passed) campaigns and evaluates them to calculate the: • Baseline count • Target count • Evaluation count Evaluation count analyzed against the Target count to determine success. Runs daily.
Content Experiences: Create To-dos	Creates to-do tasks for assigned audience for a campaign. Runs every hour by default.
Content Experiences: Deactivate Campaign Users	Deactivates users assigned to a campaign that has ended. Runs every six hours by default.
Content Experiences: Manage Content States	Updates the state of targeted content and marks content as available or expired. For example: • A Targeted Content record is available starting on 12-01-2019. • Today is 11-27-2019. • When 12-01-2019 arrives, the state of the targeted content changes from Pending to Ready or Available. • If the same content is only available until 12-05-2019 and the date is 12-06-2019, the state of the targeted content changes to Complete or Incomplete. Runs every hour and five minutes by default.
Content Experiences: Process SNC analytics	Processes analytics captured using a ServiceNow tracker to update campaign statistics. Runs daily. **Note:** Available to use if the SNC tracking profile fails to upgrade and work with flow designer.
Content Experiences: Purge Campaign Data	Purges campaigns and users based on the Content Experiences Configurations Properties settings. See the Purging section in Properties installed with Content Experiences. Runs every hour by default.

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Scheduled jobs installed (continued)

Scheduled job	Description
Content Experiences Profile	Works with the trigger associated with Content Experiences Profile. Processes analytics collected by the Content Experiences Profile tracker to update campaign statistics. Runs daily.
Content Experiences: Send Email Notifications	Sends the emails for a campaign. Runs every hour by default.
Content Experiences: Send Push Notifications	Sends SMS notifications for a campaign. Runs on a designated repeating interval.
Content Experiences: Send MS Teams Notifications	Sends an MS Teams notification for a campaign. Runs every 90 minutes by default.
Content Experiences: Update Campaign Audience	Reevaluates the audience for a campaign and removes employees that no longer satisfy the criteria. Adds users that match your defined criteria to the campaign. Users show up in the Campaign Targets related list for a campaign. You can view the updated audience from the Campaign Targets tab of a campaign. See View campaign targets. Runs daily by default.

Tables installed

Tables installed

Table	Description
Campaign [sn_ca_campaign]	Defines high-level information about a campaign, including the to and from date range a campaign runs and the audience that can view it.
Campaign Bundle [sn_ca_campaign_bundle]	Grouping mechanism for items that have the same triggering mechanism and availability.
Campaign Content [sn_ca_campaign_item]	Campaign content associated with a bundle.
Targeted Content [sn_ca_campaign_item_user]	Campaign content available to the audience. After a campaign publishes and content is available, users appear under the Campaign Target tab of the campaign,
Campaign Target [sn_ca_campaign_user]	Who in your company is part of a campaign.
Creation Status [sn_ca_creation_status]	Tracks whether a campaign target has visited a particular widget instance that is part of the campaign.

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Components installed with Content Publishing

Several types of components install with the activation of the Content Delivery [com.sn_content_delivery] plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Content Publishing [com.sn_content_delivery] plugin activates the sn_cd.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Content Publishing admin user by requiring a minimum number (default is two) of active users with this role.

Roles installed

The following roles are included when you install Employee Center application (sn_ex_sp):

Roles installed

Role title [name]	Description	Contains roles
Content Publishing Admin[sn_cd.content_admin]	Grants access to all Content Publishing information and privileges. Can access read and write records to the content publishing tables. Can add or edit content type. Can create or edit Content templates. Can schedule content for the service portal or Employee Center.	• Content Publishing Manager [sn_cd.content_manager] • Template Manager [sn_cd.content_template_owner]
Content Publishing Manager[sn_cd.content_manager]	Can create and schedule content for Content Publishing.	None
Template Manager [sn_cd.content_template_owner]	Can create and view content templates for news articles.	None
Campaign manager [sn_ca.campaign_manager]	Provides access to all Content Experiences content. This includes: Creating and scheduling content for the Employee Center and campaigns.	• sn_esign.config_manager • sn_cda.analytics_reader • sn_cd.content_approver
Content Publishing Analytics Admin[sn_cda.analytics_admin]	Required to set up an analytics profile.	None

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Roles installed (continued)

Role title [name]	Description	Contains roles
Content Publishing Analytics Reader[sn_cda.analytics_reader]	Can access and view analytics reports.	None

Scheduled jobs installed

Scheduled jobs installed

Scheduled job	Description
Content Publishing: Create To-dos	Creates to-do tasks for assigned audience. Runs every hour by default.
Content Publishing: Deactivate Expired Content	Deactivates published content items if the scheduled dates have passed. Runs every hour by default.
Content Publishing: Send Email notifications	Sends email notification for a specified audience and specified date. Runs every hour by default.
Content Publishing: Post to Forums	Posts community content to community forums. Runs every hour by default.
Content Publishing: Send MS Teams Notifications	Sends a scheduled notification to employees in MS Teams Runs every hour by default.

Tables installed

Tables installed

Table	Description
Audience [sn_cd_audience]	A targeted group of users.
Audience Data [sn_cd_audience_data]	Used when **Audience type** is **Upload File** from the Audience form. Where you store uploaded users.
Block Content[sn_cd_block]	Reusable content for notifications, rich-text announcements, or community posts (when you install communities).
Community Content [sn_cd_content_community]	Content posted to a topic or forum in a community. Community content can be: • Blog • Event

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Tables installed (continued)

Table	Description
	• Video • Post list
To-do Content [sn_cd_content_todo]	Defines the to-do content. To-do content are tasks assigned to employees that can be a part of a campaign. To-dos can also trigger additional content after completing the initial task. Users verify task completion by: • Button click • Video launch • Link click
Content Task [sn_cd_task]	Extends the HR task [sn_hr_core_task] table and where you create tasks for the Employee Center to-dos.
Org Chart Configuration [sn_cd_config_org_chart]	What information appears on the Org Chart.
User Display Configuration [sn_cd_user_display_configuration]	Controls when users display on the Org Chart page and HRI My Team widget in the Employee Center.
Company events [sn_cd_event]	Company events content type
Content [sn_cd_content_base]	Base table for fields common to Content tables.
News Content [sn_cd_content_article]	Company news and announcements published to the portal via widgets.
Notification Content [sn_cd_content_notification]	Defines an email blast announcing important news and links directing the user to the service portal.
Portal Content [sn_cd_content_portal]	Content or information you make available to your employees on the Employee Center. Content can be a banner, calendar, event, image-based link, rich text, URL, or video.
Content Type [sn_cd_content_type]	Classifies the content you want to appear on the Employee Center. Examples are: • Community content • Portal content • Notification content • To-do content
Schedule Content [sn_cd_content_visibility]	Determines what content appears on the Employee Center, for what audience, and when.
Link Content [sn_cd_url_asset]	URL links to information to appear on the Employee Center.

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Widgets installed

Widgets installed

Widget	ID	Description
Announcements (CD)	cd-announcements	Shows portal content with content type of Rich Text. Generally, a brief broadcast message and shows in a carousel when there are multiple items.
Category News Feed	cd-news-feed-category	Shows previews of news articles for a specific category.
Content Experience	cd-content-experience	Delivers targeted, actionable communications to employees. For more information, see Creating campaigns.
Content To-do (CD)	cd-content-todo	This widget is part of the HR to-do completion process used in the Employee Service Center, but cannot be used as a standalone widget.
Event Calendar (CD)	cd-event-calendar	Shows portal content with content type of Calendar. Shows schedules.
Featured News	cd-news-featured	Shows highlighted articles at the top of the News Center.
Information Links (CD)	cd-information-links	Shows portal content with content type of URL. Shows hyperlinks.
News Article Detail	cd-news-article-detail	Appears on the Article details page and holds the article body as created in the Rich Content Editor.
News Dataloader	cd-news-dataloader	Can be added to the Article details page to facilitate data sharing between the widgets on the page, which reduces the page loading time.
News Feed	cd-news-feed	Appears on the home page, News Center, and article details pages and holds previews of news articles.
News Header	cd-news-header	Appears on the Article details page and holds the headline, subheadline and image thumbnail.

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Widgets installed (continued)

Widget	ID	Description
News Info	cd-news-info	Appears on the Article details page and holds the news article publication date and Copy Link button.
Organization Chart (CD)	cd-orgchart	Shows an organization chart of an employee.
Preview Mobile Content (CD)	cd-preview-mobile-content	Notifications that show up in mobile view.
Preview of Content To-do (CD)	preview_content_todos	Shows a preview of to-do content.
Quick Links (CD)	cd-quick-links	Shows portal content with content type of Image-based Link. Shows a row of clickable images.
Rich Content (CD)	cd-richcontent	Allows you to publish rich content like a long-form article within a widget on the portal (page or topic). Shows previews of three pieces of rich content. Appears as a carousel when are there more than three published pieces of rich content.
Styled Content (CD)	cd-styled-content	Shows portal content with content type of Styled Content. Shows informative banners or text. You can configure color, alignment, and other options for text and background. Appears as a carousel when there are multiple items.
Upcoming Events (CD)	cd-upcoming-events	Shows portal content with content type of Event. Shows upcoming events.
Video Carousel (CD)	cd-video-carousel	Shows portal content with content type of Video. Multiple videos show in a carousel. You can show a scrolling list of videos using this widget.

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Widgets installed (continued)

Widget	ID	Description
		Note: Only YouTube and Vimeo embedded links are supported.
Welcome Banner (CD)	cd-banner	Shows portal content with content type of Banner. Generally used to show informative banners/text. Shows in a carousel when there are multiple items.

Note: These widgets support the Content Experience widget; they are not mean to be used directly in the portal: CD Preview widget, CE Banner content, CE Carousel Layout, CE List Layout, CE Styled Content, and CE Tile Layout.

Components installed with Content Governance

Several types of components install with the activation of the Content Governance [sn_cg] plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Content Governance [sn_cg] plugin activates the sn_cda.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Governance admin user by requiring a minimum number (default is two) of active users with this role.

Roles installed

Roles installed

Role title [name]	Description	Contains roles
Content request user [sn_cg.content_request_user]	Gives read and write access to content request records. This role is automatically assigned to the Content Publishing Content admin (sn_cd.content_admin) and Content manager (sn_cd.content_manager) roles.	None
Content items request user [sn_cg.content_request_item_user]	Gives read and write access to content items records. This role is automatically assigned to the Content Publishing Content admin (sn_cd.content_admin) and Content manager (sn_cd.content_manager) roles.	None

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Tables installed

Tables installed

Table	Description
Content Request Item [sn_cg_content_request_item]	Content created from the Content Governance interface
Content Request [sn_cg_content_request]	Request for content created by an employee or manager

Components installed with Content Analytics

Several types of components install with the activation of the Content Analytics [sn_cda] plugin, including tables, user roles, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Note: The Content Analytics [sn_cda] plugin activates the sn_cda.min_admin_count system property [sys_properties.list]. This property prevents you from deleting your only Content Analytics admin user by requiring a minimum number (default is two) of active users with this role.

Roles installed

Roles installed

Role title [name]	Description	Contains roles
Analytics admin [sn_cda.analytics_admin]	Creates tracking profiles, assigns the sn_cda.analytics_admin and sn_cda.analytics_reader roles, and can view the dashboards.	None
Analytics reader [sn_cda.analytics_reader]	Can view tracking profiles and dashboards.	None

Scheduled jobs installed

Scheduled jobs installed

Scheduled job	Description
Content Experiences: Calculate Campaign Engagements	Calculates the engagement score for every published campaign with tracking turned on. By default, runs every five minutes.
Content Experiences: Process SNC analytics	Converts analytics from the Tracked Event [sn_cda_tracked_evt_agg] table into the Analytics Statistic [sn_ca_analytics_stat] table. This fills in campaign, action, and content references.

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Scheduled jobs installed (continued)

Scheduled job	Description
	By default, runs daily.

Note: You can trigger or run a tracking profile scheduled job from the Tracking Profile list. You may have to add the **Trigger** field by using the Update Personalized List feature. See Personal lists.

Tables installed

Tables installed

Table	Description
Analytics Import [sn_cda_import]	Stores information regarding profile imports.
Analytics Log [sn_cda_analytics_log]	Stores logs created when profile validation or import fails.
Analytics Visit Statistic [sn_cda_analytics_visit_stat]	An accumulation of visit statistics on a per day and per profile basis. For example, the number of visitors and page views per session.
Browser [sn_cda_visit_browser]	Stores unique list of browsers.
Browser Statistic [sn_cda_browser_stat]	Stores analytics related to visits based on browsers and devices.
Device Statistic [sn_cda_device_stat]	Stores analytics related to device types (for example, desktop, mobile).
Event Statistic [sn_cda_event_stat]	Stores browser event analytics (for example, video plays, button clicks) from all profiles.
External Tracking Profile [sn_cda_external_tracking_profile]	Generic table that holds external tracking profiles.
Page Statistic [sn_cda_page_stat]	Stores page view analytics from all profiles.
Profile Trigger [sn_cda_profile_trigger]	Stores schedule jobs, one per profile, which imports data for the tracking profile.
Restricted Country [sn_cda_m2m_prof_country]	Defines what countries you do not want to track. Do not track users that reside in the defined country.
ServiceNow Tracking Profile [sn_cda_snc_tracking_profile]	Stores profiles when tracking with ServiceNow. Extends Tracking Profile [sn_cda_tracking_profile]
Tracked Event [sn_cda_tracked_evt_agg]	Stores raw tracked events for ServiceNow profiles. When imported, transforms to the sn_cda_event_stat table.
Tracked Field Value [sn_cda_tracked_fld_value]	Helper table to use during tracking for storing references to unique field/value combinations. Enables analytics breakdowns.
Tracked Page [sn_cda_tracked_page_agg]	Stores raw page view events for ServiceNow profiles. When imported, transforms to the sn_cda_page_stat table.

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Tables installed (continued)

Table	Description
Tracking Profile [sn_cda_tracking_profile]	Generic table that holds analytics profiles.
Tracked Visit [sn_cda_tracked_visit_agg]	Stores raw visit events for ServiceNow profiles. When imported, transforms to the sn_cda_visit_analytics_stat table.
Visit Referral [sn_cda_visit_referral]	Stores analytics related to page referrals.

Tables installed with Content Experiences and Content Analytics

Table	Description
Analytics Statistic [sn_ca_analytics_stat]	Stores aggregate analytics for a campaign, including interactions with campaign, action, and content.
Archived Campaign Statistic [sn_ca_campaign_arch]	Stores archived campaign statistics.
Tracked Action [sn_ca_tracked_action]	What unique actions you want to track with a campaign.
Campaign Tracked Action [sn_ca_m2m_campaign_action]	Track the many-to-many relationships between actions and a campaign. Track only actions that are part of a campaign.
Convertive Action [sn_ca_m2m_action_content_type]	Many-to-many relationship between actions and content types. Defines what types of actions contribute to the engagement score of a campaign. For example, a banner impression action should not change the engagement score, but a banner click-through should.

Widgets installed

Widgets installed

Widget	ID	Description
Content Analytics Site Tracker	cda-site-analytics	Helps analyze user behavior, usage metrics, and more from the user experience dashboard.

Note: A new **Enable Tracking** field has been introduced to content notifications, designed specifically for email content. Existing notification records will have this field disabled by default, in line with prior system settings and by default, existing email content will have tracking turned off. However, for new email notification contents, the **Enable Tracking** option will be available for your selection and will be automatically enabled on new record creation. This feature provides greater flexibility, allowing you to determine whether tracking should be applied to specific email content record.

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Content Analytics dashboards

Content Analytics display data visualizations for portal data collected in the default tracking profile.

Content Analytics dashboard

The Content Analytics dashboard displays portal engagement metrics, including unique users.

Dashboard widgets

Widget	Description
Adoption	Tracks the number of new and returning (unique) users each day
Average Session Duration	Average number of minutes a user spends in a session. The system tracks a session as either • 30 minutes after a user opens a page • Until the user closes the tab
Average Time per Page	Average number of minutes a user spends looking at a page
Engagement Metrics	Type of engagement (page views and session) by week represented with vertical bars, with a line representing average weekly page views
Visits by Browser	Number of views by browser type
Visits by Device	Number of views by device type
Unique Users	Total number of users from the previous day

Content Analytics- Basics dashboard

The Content Analytics dashboard displays portal page visits and views, including visits per day and most-frequently viewed pages.

Dashboard widgets

Widget	Description
All Visits in Last 365 Days	Total number of visitors in the last 365 days
Average Page Views Per Session	Average pages a user views in a session. The system tracks a session as either • 30 minutes after a user opens a page • Until the user closes the tab
This Week's Top Pages	Bar chart displaying the most viewed pages from the previous seven days
Page Views Per Day	Line graph displaying the number of pages viewed each day

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Dashboard widgets (continued)

Widget	Description
Visits Per Day	Line graph displaying the number of visitors to the portal each day
Yesterday's Top Pages	Bar chart displaying the most viewed pages from the previous day

Content engagement dashboard

Content analytics displays data visualizations of engagement metrics for content published to the portal or Now mobile app in the Content Engagement dashboard.

Dashboard overview

The Content engagement dashboard displays metrics for user engagement, such as content views, reaction icon clicks, comments, and replies to comments. For more information, see Content engagement

Content Engagement Visualizations

Visualization	Description
Total engagement over articles posted	Number of reactions and comments/replies by day
Unique views	Number of unique views by day
Reported content	Lists content items with reported comments.
Reported comments	Lists reported comments.

Content Library Overview dashboard

Content analytics displays data visualizations of performance metrics for content published to the portal or Now mobile app in the Content Library Overview dashboard.

Dashboard overview

The Content Library Overview dashboard displays metrics for content published via a schedule or publish plan. This dashboard does not display content delivered via a campaign. For campaign content data visualizations, see Campaign overview and Campaign analytics dashboards.

Content Library visualizations

Visualization	Description
Open Content Tasks	Number of tasks by status (such as open or closed complete). Each bar in the chart links to a list of the tasks with that status.
Recent Content Task Closures	Vertical bar chart that shows the number of tasks that were closed by time period. Each bar in the chart links to a list of tasks closed within that time frame
Event Activity Over Time	Total number of user interactions with content.

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Content Library visualizations (continued)

Visualization	Description
Events Over Time by Content	Number of user interactions with content, where each line represents a piece of content. Mouse over a line to see metrics specific to a piece of content.
Events Over Time by Action	Number of user interactions with content, where each line represents a type of interaction. Mouse over a line to see metrics specific to a type of interaction.
Top Content	Bar chart showing the most accessed content. Clicking a bar shows metrics for the specific content and action.
Action Activity	Pie chart that shows the proportions of each type of interaction and impressions compared to the total number of actions.
Top Notifications	Bar chart showing the most clicked notifications for the specific time period.

Interaction tracking

Dashboards display data visualizations for specific parameters, such as user interactions with content.

Note:

- An interaction is an action performed by the user, such as a download, link click, to-do completion, or video play.
- An impression is an instance of content appearing for a user. Each time a user views the content, it is counted as an interaction.

Content Analytics tracks the following user interactions (depending on content type). When content is rendered in the portal, the system counts that as an impression. When an employee clicks on content, the system counts that as a clickthrough, download, or played (depending on the content type).

- Banner clickthrough
- Banner impression
- Calendar download
- Calendar impression
- Email clickthrough
- Event download
- Event impression
- Image-based link clickthrough
- Image-based link impression
- Link clickthrough
- News article tab clickthrough
- News article clickthrough

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- News article impression
- Rich content tab clickthrough
- Rich content clickthrough
- Rich content impression
- To-do completion
- To-do impression
- Video impression
- Video played

Employee Center Pro widgets

You can use base system widgets as-is in the portal or clone them to suit your own business needs.

Employee Center Pro widgets

EC Pro widgets

Widget	ID	Description
App Launcher	app-launcher	Appears on the home page to provide one-click access to recently-used applications and favorites.
Organization Chart (EC)	org_chart	Displays the employees organization chart, the relationships to other employees, and more.
Web Applications	web_applications	Provides one-click access to applications assigned to the user.

Content Publishing widgets

Content Publishing

Widget	ID	Description
Announcements (CD)	cd-announcements	Shows portal content with content type of Rich Text. Generally, a brief broadcast message and shows in a carousel when there are multiple items.
Category News Feed	cd-news-feed-category	Shows previews of news articles for a specific category.
Content Experience	cd-content-experience	Delivers targeted, actionable communications to employees. For more

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Content Publishing (continued)

Widget	ID	Description
		information, see Creating campaigns.
Content To-do (CD)	cd-content-todo	This widget is part of the HR to-do completion process used in the Employee Service Center, but cannot be used as a standalone widget.
Event Calendar (CD)	cd-event-calendar	Shows portal content with content type of Calendar. Shows schedules.
Featured News	cd-news-featured	Shows highlighted articles at the top of the News Center.
Information Links (CD)	cd-information-links	Shows portal content with content type of URL. Shows hyperlinks.
News Article Detail	cd-news-article-detail	Appears on the Article details page and holds the article body as created in the Rich Content Editor.
News Dataloader	cd-news-dataloader	Can be added to the Article details page to facilitate data sharing between the widgets on the page, which reduces the page loading time.
News Feed	cd-news-feed	Appears on the home page, News Center, and article details pages and holds previews of news articles.
News Header	cd-news-header	Appears on the Article details page and holds the headline, subheadline and image thumbnail.
News Info	cd-news-info	Appears on the Article details page and holds the news article publication date and Copy Link button.
Organization Chart (CD)	cd-orgchart	Shows an organization chart of an employee.
Preview Mobile Content (CD)	cd-preview-mobile-content	Notifications that show up in mobile view.
Preview of Content To-do (CD)	preview_content_todos	Shows a preview of to-do content.
Quick Links (CD)	cd-quick-links	Shows portal content with content type of Image-based

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Content Publishing (continued)

Widget	ID	Description
		Link. Shows a row of clickable images.
Rich Content (CD)	cd-richcontent	Allows you to publish rich content like a long-form article within a widget on the portal (page or topic). Shows previews of three pieces of rich content. Appears as a carousel when are there more than three published pieces of rich content.
Styled Content (CD)	cd-styled-content	Shows portal content with content type of Styled Content. Shows informative banners or text. You can configure color, alignment, and other options for text and background. Appears as a carousel when there are multiple items.
Upcoming Events (CD)	cd-upcoming-events	Shows portal content with content type of Event. Shows upcoming events.
Video Carousel (CD)	cd-video-carousel	Shows portal content with content type of Video. Multiple videos show in a carousel. You can show a scrolling list of videos using this widget. **Note:** Only YouTube and Vimeo embedded links are supported.
Welcome Banner (CD)	cd-banner	Shows portal content with content type of Banner. Generally used to show informative banners/text. Shows in a carousel when there are multiple items.

Note: These widgets support the Content Experience widget; they are not mean to be used directly in the portal: CD Preview widget, CE Banner content, CE Carousel Layout, CE List Layout, CE Styled Content, and CE Tile Layout.

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Content Analytics widgets

Content Analytics

Widget	ID	Description
Content Analytics Site Tracker	cda-site-analytics	Helps analyze user behavior, usage metrics, and more from the user experience dashboard.

Employee Profile

List of widgets for Employee Profile

Widget	ID	Description
Employee Profile Details	employee_profile_details	Displays the basic profile and work- related information of an employee.
Employee Profile Header	employee_profile_header	Appears across the employee profile page.
Employee Profile My Team	employee_profile_my_team	Displays my team information.
Employee Profile Overview	employee-profile-overview	Displays the employee profile overview.
Public Profile Visibility	public_profile_visibility	Shows the visibility setting for the profile. You can modify the visibility settings based on your needs.

For more information, see Employee profile.

Employee Center Pro Kiosk widgets

List of widgets for EC Pro Kiosk

Widget	ID	Description
Kiosk Header	eck-header	Appears across the kiosk portal and provides quick access to My requests, My favories, Employee profile, and so on.
Employee Center Pro Kiosk Portal login	ec-pro-kiosk-portal-login	Enables the login and access to the kiosk portal.
Employee Upcoming Shift	employee-upcoming-shift	Shows upcoming events.
Timeoff Accrual Balance	timeoff-accrual-balance	Shows the time off and leave balances.
Timeoff Accrual Balance - Home Page	timeoff-accrual-balance-home-page	Shows the time off and leave balances home page.

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List of widgets for EC Pro Kiosk (continued)

Widget	ID	Description
Preferences	preferences	Shows the user preferences such as accessibility and language.

For more information, see Employee Center Pro Kiosk.

For more information on configuring widgets, see Customize Employee Center Pro Kiosk widgets.

Feedback configuration form

Description of the feedback configuration form fields to target a portal for feedback responses.

Feedback configuration form

Field	Description
Name	Name of the table record
Feedback portal	Targeted portal for feedback
Anonymous response	• **User opt-in**: Admin receives the user details from the feedback. • **Anonymous**: User details remain anonymous.
Application	Application scope where the record resides.
Active	Selected Option to enable the application scope.
Order	Order of priority for the record.
Overlay session limit	Number of times the feedback widget reloads.
Feedback title	Introductory text for the feedback request.
Feedback button label	Text visible on the button of the feedback widget.
Privacy Information	• **User privacy link**: Link that contains terms and conditions of company privacy policy. • **User privacy text**: Prompt text to notify the user about the privacy policy. • **User privacy help text**: Help text with a short description of the privacy policy.
Success Message Preferences	• **Success icon**: Icon to display with the success message. • **Success text**: Success message that is displayed to the user after submitting feedback. • **Success description**: Acknowledgment message that is displayed after you submit your feedback.

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Feedback configuration form (continued)

Field	Description
Drawer Options	• **Drawer text**: Welcome text on the feedback drawer widget. • **Page placement**: Placement of the feedback drawer on the portal page. • **Orientation**: Orientation of the feedback drawer on the portal page. • **Position from top**: Position where the Drawer shows up on the page.

Feedback definition form

Description of the feedback definition form fields to curate the experience and service feedback widgets in the portal pages.

Feedback definition form

Field	Description
Name	Name of the feedback definition
Feedback type	• **Experience:** Feedback through the drawer widget visible across the portal or through the Virtual Agent. • **Service - in page:** Feedback after using any page on the portal. • **Service - topic page:** Feedback for a topic page under a taxonomy. **Note:** Admin must select the topic page where the feedback prompt appears. • **Service - workflow:** portal, Virtual Agent, or email where you want to set up the feedback experience. **Note:** • You can exclude a page on the portal manually from all the feedback types except **Service - topic page**. • You can view **Survey** as a feedback type only if you have a **Survey Instances** set up. For more information on setting up a survey instance, see Configure a survey in the survey designer.
Widget mode	**Drawer:** Drawer widget shows up on the portal pages. This widget mode is visible when the feedback type is **Experience**.
Widget mode	**Modal:** Feedback widget visible unless there's an overlay setting in place to stop the reload. **Note:** **Overlay session limit** can be configured from the feedback configuration form.

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Feedback definition form (continued)

Field	Description
Widget mode	**Inline:** Feedback widget visible inline on the portal page.
Channel	**Portal**: Channel to receive feedback from the portal pages.
Channel	**Mobile**: Channel to receive feedback from the MESP pages.
Channel	**Email**: Channel to receive feedback via Outlook email. This channel is visible only when **Service - workflow** or **Survey** is selected from the **Feedback type**.
Channel	**Virtual Agent**: Channel to receive the feedback via the Virtual Agent. This channel is visible only when **Service - workflow** or **Survey** is selected from the **Feedback type**.
Active	Selected Option to keep the feedback definition record active.
Portals	Portal where the feedback shows up. Each feedback definition targets one portal that provides flexibility of creating separate definitions for different portals. This field is only available when the **Channel** is **Portal** or **Mobile**.
Audience	Target audience for the feedback. This field is only available when the **Channel** is **Portal** or **Mobile**.
Order	Order of priority for the feedback. The larger the order in number, the higher is the priority of the feedback definition.
Feedback content	**Use existing survey**: Option to enable the **Survey** field to add a survey to the definition. The check box is available for both **Experience** and **Service - in page Feedback type**.
Feedback content	**Question**: Question to provide feedback on that is visible to the user. This field appears only when **Feedback type** is **Service -in page**, **Service - topic page**, or **Service - workflow**.
Feedback content	**Rating**: Type of rating chosen for the feedback. The options available are the following: • **Experience** • **Numeric - 5 point scale** • **Stars - 5 point scale**
Feedback content	**Additional information label**: Text field to write additional feedback.

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Feedback definition form (continued)

Field	Description
	This field is visible when **Allow additional information** box is checked.
Feedback content	**Additional information requirement**: Additional information of varying requirements to be provided. The following options are available: • **Optional**: Additional information is optional before submitting the feedback. • **Mandatory**: Additional information is mandatory before submitting the feedback. • **Mandatory based on rating threshold**: Additional feedback is mandatory if the rating is equal to or below the set threshold. The threshold is configurable.
Feedback content	**Rating threshold**: Rating threshold below which additional information is mandatory to submit the feedback. This field is only visible when the **Additional information requirement** is **Mandatory based on rating threshold**.
Feedback content	**Survey**: Existing survey to be added to the **Feedback type**. To use a survey for the **Email Channel**, Outlook Actionable Messages must be selected in the survey definition. To use a survey for the **Virtual Agent Channel**, **Chat Survey** must be selected in the survey definition. For more information about chat surveys, see Create chat surveys. For more information about survey definitions, see Modify a survey definition.
Feedback content	**Survey rating metrics**: Survey question type that is used to gauge customer satisfaction. It captures feedback data for the User Experience Dashboard. **Note:** A feedback task is generated when the rating provided is beneath or equal to the value set for the **Rating threshold** field. The question must have a numeric answer type. Text-type answers aren't supported in this field. This field is available only when a **Survey** is selected from the list of surveys in the **Survey** field.
Page selection	**All pages:** Selected Option to choose all pages for a **Feedback type**.
Page selection	**Included pages:** Pages where the feedback type is available. This field is visible when the **All pages** check box is cleared.
Page selection	**Excluded pages:** Pages the feedback type isn't added.

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Feedback definition form (continued)

Field	Description
	The **Included pages** field is replaced by the **Excluded pages** field when **All pages** is checked.
Overlay settings	Overlay settings for the feedback to determine how and when it shows up to the user. **Widget trigger:** Trigger type for the overlay settings. The following are the available widget triggers. **Manual:** Feedback widget is only available when selected. This field is only available for **Widget mode Drawer**. **Delay:** Feedback widget is available after an allotted delay. **On scroll:** Feedback widget is available on scrolling. **On load**: Feedback widget is available on loading the page. **Widget delay**: Delay in loading the feedback widget measured in seconds. This field appears only when **Delay** is selected in **Widget trigger**.
User Engagement	**Feedback Exclusion Period**: Period of time selected as a buffer when the user won't be reminded to provide feedback when they land on a page.
Post-feedback Configuration	**Rating threshold**: Rating value below which a feedback task is generated. **Note:** Feedback task for any feedback type is generated when the rating provided is beneath or equal to the value set for the **Rating threshold** field. **Assignment groups**: Group that receives the feedback task when generated. **Create feedback task**: Selected Option to create a feedback task post-feedback submission.

Link content form

Link content form.

Link Content

Field	Descriptions
Name	The name that describes the link to content.
URL	The URL link to content to appear on the service portal. This field only appears when you select **Video** or **Link** from the **Type** list.
To-do content	The to-do content you want to reference to your link content.

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Link Content (continued)

Field	Descriptions
	This field only appears when you select **To-do** from the **Type** field. **Note:** Use this field to reference your to-do content to a link that can be used in a banner or styled content. For more information, see Creating to-do content.
Type	The type of link for the content. • Video: Link is a video. **Note:** Must be an embedded link. • Link: Link is to content, information, image, or documentation. • To-do: Link is a to-do. **Note:** Use this when you want to place a to-do link in a banner or styled content. • Forums Link: Link to a Communities forum post. Only appears when Communities plugin [com.sn_communities] is installed. **Note:** After link content is associated with Portal Content, the **Type** cannot be modified. See Portal content.
Load link in	You can override how your links open within your portal. Previously, all link content loaded in a new tab. Use this field to load your link into the current portal page. New tab: Default value and loads your link content in a new tab on your portal. Current page: Select to load your link content in your portal and not as a separate tab.
Forum	The forum in Communities you want the link to appear and share with members of the forum. Only appears when **Forums Link** is selected from **Type** and the Communities plugin [com.sn_communities] is installed. For information on Communities, see Communities.

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Link Content (continued)

Field	Descriptions
Topic	Topic you want the link to appear in. Topics are subcategories to a forum. For example, HR is the forum and Benefits is a subcategory to HR. Only appears when **Forums Link** is selected from **Type** and the Communities plugin [com.sn_communities] is installed.
Forum post	The list of posts from the topic or forum the link appears. For example: • Forum: HR • Open Enrollment: Benefits • Forum post: Only appears when **Forums Link** is selected from **Type** and the Communities plugin [com.sn_communities] is installed.

Notification content form

Notification content form

Notification Content form

Field	Description
Title	Title that displays for the push notification.
From	The email address of the person or organization you want the notification to come from. **Note:** This field only appears when **Content type** is **Email**.
Reply to	Email address you want to appear in the **Reply to** field of the email.
Subject	The subject of the email.
Use block content	Indicates you want to use block content as a notification.
Block content	Only displays when you check **Use block content**. Select the block content you want to appear as a notification or select **New** to create block content. **Note:** For more information, see Add or modify block content.

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Notification Content form (continued)

Field	Description
Body	Only displays when you check **Use block content**. Enter message text for your notification. **Note:** You can use the rich text edits to enhance your notification.
Description	Only appears when you select **Push** from the **Content type** list. A description for the push notification.
Content type	The type of notification you want to send. Set the value to `Push` or `Email`.
Active	Option to activate the push notification for use. **Note:** Your content must be active in order to publish it.

Properties installed with Content Experiences

The Content Experiences [sn_ca] plugin adds properties that determine how a campaign runs related to scheduled jobs and performance.

To access Content Experiences properties, navigate to **Content Experiences** > **Configurations** > **Properties**.

Content Experiences properties determine how the scheduled jobs run and help to ensure that there is limited impact on the performance of your instance.

Note: Properties with an asterisk (*) in front of the name indicates that the default values are recommendations when the number of users targeted is 100,000 or less. If your audience is over 100,000 and the scheduled jobs run longer than expected, you can try increasing the values.

Approvals

Property	Usage
All approvers must approve any schedule content record to publish it (sn_ca.all_must_approve)	Indicates that all approvers must approve any scheduled content prior to publishing it. If you check **No**, only one approver is required to publish a campaign.

Enable Content Management Ownership

Property	Usage
Allow Ownership for Audiences (sn_cd.activate_audience_delegation_controls)	Indicates you want to be able to enable audience ownership within Content Experiences. For more information, see Content Ownership.

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Enable Content Management Ownership (continued)

Property	Usage
Allow Ownership for Content Items (sn_cd.activate_content_authoring_controls)	Indicates you want to be able to enable content item ownership within Content Experiences. For more information, see Content Ownership.
Allow Ownership for Topics (sn_cd.activate_topic_ownership)	Indicates you want to enable topic ownership within Content Experiences. Ownership of a topic includes: • Ability to restrict what groups or users can schedule content to a topic for a campaign. • Ability to edit content assigned to the topic. • Ability to preview content for the topic. **Note:** Other users that have access to the content can view the content scheduled to the restricted topic, but cannot remove the topic from the schedule. For more information on this and what roles are required, see Content Ownership.
Allow Ownership for Portal pages (sn_cd.activate_page_ownership)	Indicates you want to exclude groups or non-applicable content managers (specific users) from assigning content to a specific portal page.

Add users

Property	Usage
*Max run time in seconds of scheduled job (Job will finish processing current item after time has elapsed) (sn_ca.add_users.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Update Campaign Audience scheduled job runs. Limits the length of the scheduled job, but completes any work in progress and does not pick up any new work. Default value: 1,800 seconds
The number of seconds to stagger events to process campaigns by (sn_ca.add_users.event_stagger.campaign)	The amount of time between campaign events when a scheduled job runs. Staggering provides time for the events to be processed during the staggered time. Default value: 300 seconds
The number in seconds to stager events to add user by (sn_ca.add_users.event_stagger.users)	The amount of time between campaign events to add users when the Content Experiences: Update Campaign Audience scheduled job

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Add users (continued)

Property	Usage
	runs. Staggering provides time for the events to be processed during the staggered time. Default value: 3 seconds
Max number of events to add users per campaign (sn_ca.add_users.max_events)	The maximum number of events that users can be added for a campaign when the Content Experiences: Update Campaign Audience scheduled job runs. Default value: 1,000
Max number of users to add per event (sn_ca.add_users.max_users_per_event)	The maximum number of users you can add in a single event. Default value: 1000

Non-Portal Content

Property	Usage
*Max run time in seconds of scheduled job (Job will finish processing current item after time has elapsed) (sn_ca.campaign.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Add Non-Portal Campaign Content scheduled job runs. Limits the length of the Content Experiences: Send Email Notifications scheduled job, but completes any work in progress and does not pick up any new work. Default value: 2,700 seconds
*Max number of campaign targets to process per job run (sn_ca.campaign.max_records_process)	The maximum number of people a campaign can target per scheduled job run. Default value: 100,000
*Max number of records to create per job run (sn_ca.campaign.max_records_create)	The maximum number of records to create per job run. Default value: 100,000
The number of seconds to stagger events to process pending content by (sn_ca.campaign.pending.event_stagger)	The number of seconds between each time the Content Experiences: Add Non-Portal Campaign Content scheduled job runs to try to send non-portal content. Default value: 3 seconds

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Non-Portal content limitations

Note
These properties determine limits on non-portal content (emails and SMS). The Content Experiences: Send Email Notifications scheduled job runs every hour by default and attempts to send non-portal content not sent in the first pass. Customers with a large database should consider increasing this property after testing the impact it could have on performance.

To-do Content

Property	Usage
Max run time in seconds of scheduled job (Job will finish processing current item after time as has elapsed) (sn_ca.task.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Create To-dos scheduled job runs. Limits the length of the scheduled job, but completes any work in progress and does not pick up any new work. Default value: 300 seconds
Max number of records to create per job run (sn_ca.task.max_records_create)	The maximum number of records to create per scheduled job run. Default value: 25,000

Notifications

Property	Usage
The maximum number of users to add per event for SMS (sn_ca.sms_notification.max_users_per_event)	The maximum number of users to add per event for an SMS notification. Default value: 1,000
*Max run time in seconds of scheduled job (Job will finish processing current item after time has elapsed) (sn_ca.notification.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Send Email Notifications, Content Experiences: Send Push Notifications, Content Experiences: Send SMS Notifications scheduled jobs run. Default value: 1,800 seconds
*The maximum number of events to queue per job run for SMS (sn_ca.sms_notification.max_events)	The maximum number of events to queue for SMS messages when the Content Experiences: Send Email Notifications, Content Experiences: Send Push Notifications, Content Experiences: Send SMS Notifications scheduled jobs run. Default value: 100

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Notifications (continued)

Property	Usage
	Note: The Notify (com.snc.notify) plugin must be activated for this sys property and Content Experiences: Send SMS Notifications scheduled job to appear.
The number of seconds to stagger events by (sn_ca.notification.event_stagger)	The amount of time between events when the Content Experiences: Send Email Notifications, Content Experiences: Send Push Notifications, Content Experiences: Send SMS Notifications scheduled jobs run. Staggering provides time for the events to be processed during the staggered time. Default value: 3 seconds
*The maximum number of events to queue per job run for Email (sn_ca.notification.max_events)	The maximum number of events to queue for the Content Experiences: Send Email Notifications, Content Experiences: Send Push Notifications, Content Experiences: Send SMS Notifications scheduled jobs run. Default value: 100
The maximum number of events to queue per job run for Email (sn_ca.notification.max_events)	The maximum number of events to queue per job run for email notifications. Default value: 100
The maximum number of users to add per event for Email (sn_ca.notification.max_users_per_event)	The maximum number of users to add per event for email notifications. Default value: 1,000

State Management

Property	Usage
The number of seconds to stagger the sn_ca.campaign.published event after kicking off the Create To-Dos and Send Notifications Flow Designer Actions. Default is 2700 seconds or 45 minutes. (sn_ca.campaign.published.event_stagger)	Determines the time to delay the publication of a campaign after the Create To-Dos and Send Notifications Flow Designer Actions are started. This sys property determines when the state of a campaign is set back to Published after going through the other states. The Published state is required for the scheduled jobs to pick up for future processing. Default value: 2700 seconds or 45 minutes.

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State Management (continued)

Property	Usage
Max run time in seconds of scheduled job (Job will finish processing current item after time has elapsed) (sn_ca.state_management.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Manage Content States scheduled job runs. Default value: 300 seconds
Used to manage whether we want to trigger the campaign publishing process immediately after publishing the campaign. (sn_ca.publish.campaign.immediately)	Check **Yes** to indicate you want a campaign to trigger immediately after selecting the Publish button. Checking **Yes** is recommended for campaigns targeting less than 100,000 users. **Note:** Selecting **Yes** bypasses the scheduled jobs and is dependent on the start date and time.
Max number of records to update per job run (sn_ca.state_management.max_records_update)	The maximum number of records to update per job run. Default value: 25,000

User Deactivation

Property	Usage
Max run time in seconds of scheduled job (Job will finish processing current item after time has elapsed) (sn_ca.user_deactivation.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Deactivate Campaign Users scheduled job runs. The scheduled job deactivates flagged users. Default value: 300 seconds
Max number of users to deactivate per job run (sn_ca.user_deactivation.max_users_per_job)	The maximum number of users to deactivate per job run. The Content Experiences: Deactivate Campaign Users scheduled job runs every six hours by default. Default value: 25,000 users

Content Experiences limitations

Note
These properties determine limits on the Content Experiences: Deactivate Campaign Users scheduled job for optimal performance. Customers with a large database should consider increasing this property after testing the impact it could have on performance.

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Purging

Property	Usage
Max run time in seconds of scheduled job (Job will finish processing current item after time has elapsed) (sn_ca.purging.max_run_time)	The maximum amount of time (in seconds) the Content Experiences: Purge Campaign Data scheduled job runs. Default value: 300 seconds
Max number of users to purge per job run (sn_ca.purging.max_users_per_job)	The maximum number of users to purge per job run. Default value: 25,000
Purge campaign data after the campaign ends (sn_ca.purging.purge_after_campaign_end)	Purge all campaigns when the end date is reached. Default value: Yes
Number of days after the campaign ends to start purging campaign data (sn_ca.purging.days_after_campaign_end)	The number of days after the campaign end date when campaigns are purged. Default value: 180 days
Purge campaign data for a user after user exits campaign (sn_ca.purging.purge_on_user_removed)	Indicates if campaign information for a user should be purged after the user is removed from the campaign. Default value: Yes
Number of days after user exits campaign to start purging campaign data (sn_ca.purging.days_after_user_removed)	The number of days after a user is removed from a campaign to remove the campaign information. Default value: 180 days

Campaign Re-evaluation

Campaign Re-evaluation

Property	Usage
The number of days after which the campaign audience to be re-evaluated (sn_ca.campaign.reevaluation_frequency)	The default number of days to re-evaluate a campaign audience. You can override this default from the **Re-evaluate campaign** and **Re-evaluate frequency** fields on the Campaign form. For more information, see View campaign targets. Default value: 7 days

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Portal Preview

Portal Preview

Property	Usage
Service Portal URL suffix you want to use for portal previews (sn_cd.preview.portal_url_suffix)	The URL suffix of the service portal or Employee Center (EC) your company uses for portal previews. You can change this system property when you want to preview your content over different portals. Default value: esc

Properties installed with Content Governance

The Content Governance [sn_cg] plugin adds properties that determine how many records to show in the Content Operations dashboard.

Content Operations dashboard

Property	Usage
Set amount of days from when campaign content will be expiring	Sets the number of days for the "Campaign content expiring within x days" card in the Content library and campaigns section Default value: 7 days
Set amount of days from when content needs approval	Sets the number of days for the "Content requests due within x days" card in the Content requests section Default value: 7 days
Set amount of days from when schedule content will be expiring	Sets the number of days for the "Content expiring within x days" card in the Content library and campaigns section Default value: 7 days

Properties installed with Content Publishing

The Content Publishing [com.sn_content_delivery] plugin adds the following properties that are designed to control how scheduled jobs work in relation to notifications, to-dos, and communities.

To modify Content Publishing properties as a Content Admin [sn_cd.content_admin], navigate to **Content Publishing** > **Advanced** > **Properties**.

Content Publishing properties determine how the scheduled jobs run and help to ensure that there is limited impact on the performance of your instance.

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Approvals

Properties	Description
sn_cd.all_must_approve	Indicates that all approvers must approve any scheduled content prior to publishing it. If you check No, only one approver is required to publish it.

Enable Content Management Ownership

Properties	Description
Allow Ownership for Audiences (sn_cd.activate_audience_delegation_controls)	Indicates you want to be able to enable audience ownership within Content Publishing. For more information, see Content Ownership.
Allow Ownership for Content Items (sn_cd.activate_content_authoring_controls)	Indicates you want to be able to enable content item ownership within Content Publishing. For more information, see Content Ownership.
Allow Ownership for Topics (sn_cd.activate_topic_ownership)	Indicates you want to enable topic ownership within Content Publishing. Ownership of a topic includes: • Ability to restrict what groups or users can schedule content for publication. • Ability to edit content assigned to the topic. • Ability to preview content for the topic. **Note:** Other users that have access to the content can view the content scheduled to the restricted topic, but cannot remove the topic from the schedule. For more information, see Content Ownership.
Allow Ownership for Portal pages (sn_cd.activate_page_ownership)	Indicates you want to exclude groups or non-applicable content managers (specific users) from assigning content to a specific portal page.

Enable Content Versioning and Change History

Properties	Description
sn-cd.activate_content_snapshots	Select the checkbox to enable Content Versioning for the Content Library. See Content versioning

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Notifications

Properties	Description
sn_cd.notification.max_run_time	The maximum amount of time (in seconds) the Content Publishing: Send notifications scheduled job runs. Limits the length of the scheduled job, but completes any work in progress and does not pick up any new work. Default value: 600
sn_cd.sms_notification.max_recipients	The maximum number of people you can send an SMS notification to. Default value: 50,000. **Note:** When the maximum is exceeded, the SMS is not sent. The **Notification status** on the Schedule Content form is **Max Exceeded**.
sn_cd.sms_notification.max_users_per_event	The maximum number of users to add per event for an SMS notification. Default value: 1000.
sn_cd.notification.event_stagger	The amount of time between events when a scheduled job runs. Staggering provides time for the events to be processed during the staggered time. Default value: 60 seconds.
sn_cd.notification.max_events	The maximum number of events from campaigns to process during the scheduled job. Default value: 50.
sn_cd.notification.max_users_per_event	The maximum number of users to add per event for an email notification.
sn_cd.notification.max_recipients	The maximum number of recipients allowed per email notification.

To-dos

Properties	Description
sn_cd.todo.max_run_time	The maximum run time in seconds for the Content Publishing: Create To-dos scheduled job. When the job finishes running, any current items are still processed after the elapsed time.
sn_cd.todo.event_stagger	The number of seconds between events.

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To-dos (continued)

Properties	Description
sn_cd.todo.max_events	The maximum number of events that are queued per scheduled job run.
sn_cd.todo.max_users_per_event	The maximum number of users that can be added per event.
sn_cd.todo.max_assignees	The maximum number of people you can assign to a task.

Forums

Properties	Description
sn_cd.content_community.max_posts	The maximum number of posts to a forum allowed per Content Publishing: Post to Forums scheduled job.

Translations and Language switching

Properties	Description
sn_cd.enable_language_switching	Allows you to change your system setting language in the Content Library. When you turn this system property on, the **Switch language** button appears after creating content from the Content Library. Selecting the **Switch language** button allows you to view the fields on the form to appear in the language you select. You can select the button after reviewing to switch back to your original language. For more information, see Portal content.
sn_cd.enable_localization_framework_integration	Enables integration with Localization Framework. For more information, see Configure Localization Framework for Content Publishing.

Portal Preview

Properties	Description
Service Portal URL suffix you want to use for portal previews (sn_cd.preview.portal_url_suffix)	The URL suffix of the service portal or Employee Center (EC) your company uses for portal previews. You can change this system property when you want to preview your content on a different portal.

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Portal Preview (continued)

Properties	Description
	Default value: esc

News

Properties	Description
Limits how many news articles are shown in the News widgets (sn_cd.content_page_limit)	Sets a maximum of news articles that can appear in any of the news widgets, with a system maximum of 500 articles.
Page ID you want to use for News Center (sn_cd.news_center_page_id)	Defines the landing page for news content. The **News Center** button in the main navigation redirects to this page, as well as breadcrumbs and the Call to action button in the widgets.
Page ID you want to display News articles in (sn_cd.news_article_page_id)	Defines the page where a full news article is viewed. When a user clicks a news article in a News widget, the widget redirects to this page.
Sys ID (sys_id) from the Record Section (sys_sg_item_section) table for where news articles will be displayed in the mobile app (sn_cd.mobile_record_section)	Defines the section in the mobile app where the news article is viewed.

Rich Content Editor

Properties	Description
Enables the ability to edit the HTML and CSS within a Rich Content design (sn_cd.activate_rce_edit_code)	Select **Yes** to allow content managers to edit rich content source code.

Content Providers

Properties	Description
The number of seconds to wait before timing out a video content provider subflow (sn_cd.provider_timeout)	Sets the period of time that the Employee Center attempts to connect to the video content provider. See Video hosting integrations framework

Content engagement

While Content engagement capabilities are delivered via the Content engagement plugin, the properties are configured in Content Publishing.

Properties	Description
Allow comments (sn_cd.allow_comments)	Displays a checkbox in the new content and content template forms for content managers

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Content engagement

While Content engagement capabilities are delivered via the Content engagement plugin, the properties are configured in Content Publishing.

(continued)

Properties	Description
	to allow employees to comment on news articles
Allow replies to comments (sn_cd.allow_replies_to_comments)	Displays a checkbox in the new content and content template forms for content managers to allow employees to reply to comments on news articles
Allow reactions (sn_cd.allow_reactions)	Displays a checkbox in the new content and content template forms for content managers to allow employees to select a reaction icon
Show view count (sn_cd.show_views)	Displays the number of unique views for a news article at the top of the article

Standard banner and icon sizes

Use the following sizes for the banner and icons for optimal portal performance.

Images and sizes

Images	Sizes
Home page	1440 x 400px Height is 400px and width is responsive. For desktop: 1440px width viewport, 1440 x 400px **Note:** For troubleshooting the background banner image for employee center in mobile view, see KB1280740 and other related KBs.
Topic page	1258 x 300px Height is 300px and width is responsive. For desktop: 1440px with viewport, 1258 x 300px
Icons	Topic icon: 56 x 56px **Note:** The **Background image** and the **Icon** fields show the required specifications of the respective image sizes when you hover over the field labels.

Tips for image size

Note
Tip: The updated recommendations for image sizes are available on the widget Instance Options (Control + select and hold or right click).

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To-do content form

Use the To-do content form to add to-dos to your portal page.

To-do Content form

Field	Description
Title	Name that identifies the to-do link.
Content type	Defines the kind of to-do link. • Button Complete: Employee selects a button to complete the task. • Play Video: Employee launches video to complete the task. • View Link: Employee selects a link to complete the task. • E-Signature: Requires an e-signature to complete to task. **Note:** For more information, see Add or modify content type for Content Publishing.
Use block content	Indicates that you want to use block content in your to-do.
Block content	The block content for the to-do. Appears when you check **Use block content**. **Note:** For more information, see Add or modify block content.
Active	Indicates the to-do content is active and available to use.
Button text	Text describing the button. For example, to indicate completions of enrollment in a benefits plan, enter Enrollment Complete. Appears when Button Complete is selected from **Content type**.
E-signature template	The e-signature template used with the e-signature content type. **Note:** For more information, see Configure an e-signature template.
Video	The video link you want an employee to click. Appears when you select **Play Video** in **Content type**. Define video links in Link Content.

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To-do Content form (continued)

Field	Description
	Note: For more information, see Add or modify block content.
Link	The link you want an employee to click. Appears when **View Link** is selected from **Content type**. Define links in Link Content. For more information, see Add or modify block content. **Note:** Depending on your configurations or extensions, your link may open in a new window.
Rich text	Area to provide detailed information about the task. Use the editing tools to enhance the appearance of the text. Appears if you do not check **Use block content**.

Now Assist for Employee Center Pro

Now Assist for Employee Center Pro expands across AI-powered capabilities, enterprise search, and omni-channel delivery to meet modern productivity needs.

Now Assist for Employee Center Pro offers the portal experience with all the employee communications and engagement tools. Now Assist employee experience with seamless conversational interactions, and AI search, which provides a consumer-grade search engine for Service Portal, Now Mobile, and Virtual Agent.

Note: Now Assist for Employee Center Pro only provides employee or requester conversations and might require other Now Assist products to deliver AI agents or other related features.

Get started

Explore



Learn about Now Assist for Employee Center Pro concepts and features.

Configure



Set-up the Now Assist Employee Center Pro applications and features.

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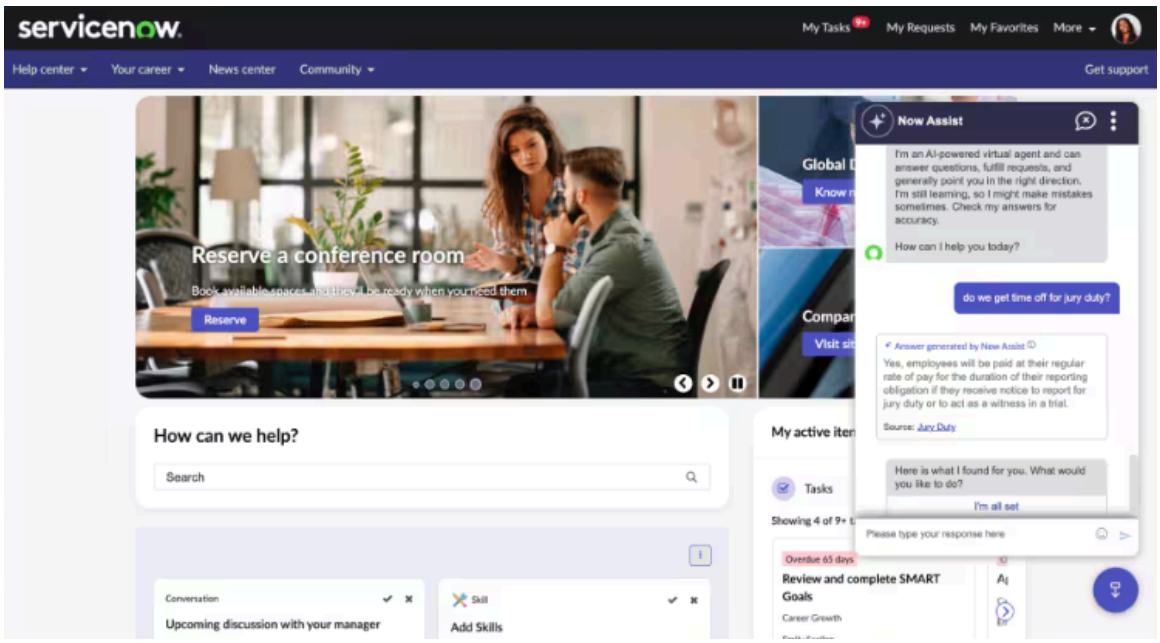
Exploring Now Assist for Employee Center Pro

Now Assist for Employee Center Pro is a modern, multi-application employee engagement layer that is designed to provide a digital front-door for employee self-service capabilities, request support and conversational assistance, and powerful enterprise search capabilities.

Now Assist for Employee Center Pro overview

Now Assist for Employee Center Pro is layered with Employee Center Pro, a multi-department employee destination site that drives employee engagement and productivity. Now Assist, which improves productivity, efficiency, and self-service while empowering your users to search more effectively. AI Search, which enables your users to have a powerful consumer-grade search experience.



Employee Center Pro

Employee Center Pro expands the portal experience beyond service delivery with employee communication and engagement tools including content publishing, campaigns, and employee communities.

Unified portal experience

improves employee productivity by reducing the time and effort employees spend looking for services, updates, and information. With the portal, access to information and services across all departments are made simple and can be accessed through any device.

Extensible service delivery platform

Organizations can easily scale from a single to a multi-department service delivery use case that includes best-in-class home page and specialized widgets designed for multi-department tasking.

Employee engagement and communication

Employees stay informed on news and events, engage with coworkers and leaders, receive targeted communications, and find cross-enterprise answers.

Now Assist

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Now Assist is a growing cross-platform family of generative AI features, which are tasks that a large language model (LLM) can perform. Generative AI features are based on the initial training and architecture.

A skill delivers a feature plus the use case to the user. An example of a skill is chat summarization within a customer workspace. Now Assist products provide features and skills that are tailored to meet the needs of users in different workflows.

Now Assist Framework

The Now Assist framework is supported across the ServiceNow AI Platform.

Note: Now Assist for Employee Center Pro only provides employee or requester conversations and might require other Now Assist products to deliver AI agents or other related features.

AI Search

Enables you to provide consumer-grade search experiences for your users.

AI Search architecture

The AI Search index stores data from ServiceNow AI Platform records or external sources and makes that data available for users to search in multiple applications. Search query features use ServiceNow AI Platform technologies to improve the search user experience.

AI Search configuration

Search administrators configure AI Search indexing and search settings in indexed sources, search sources, search profiles, and search application configurations.

What to explore next

To learn more about configuring Now Assist for Employee Center Pro, see: Configuring Now Assist for Employee Center Pro

Configuring Now Assist for Employee Center Pro

Guidance for setting up Now Assist for Employee Center Pro.

In the links below, Now Assist for Employee Center Pro features are organized into categories, each with its own landing page to help guide users through the configuration process.

- Content Engagement

  Content engagement enhances news articles by providing users with a way to comment and react to articles and for managers to measure the effectiveness of their content using engagement metrics.

- Creating employee communications

  Content Publishing offers robust communications creation tools that enable you to create, manage, and publish a variety of content types including portal content, notifications, mobile content, and tasks.

- Enterprise Service Management Integrations Framework

  The ServiceNow Enterprise Service Management Integrations Framework application contains common components that can be used for integrating your ServiceNow application with third-party systems.

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- Outlook Actionable Messages

  Outlook actionable messages plugin enables users to respond to the survey from within the Microsoft Outlook application.

- Configuring Now Assist settings and features

  Use the Now Assist Admin console to activate the various Now Assist applications and skills that you're entitled to.

  Note: Now Assist for Employee Center Pro only provides employee or requester conversations and might require other Now Assist products to deliver AI agents or other related features.

Related topics

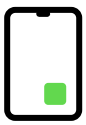
Employee Center Pro

Now Assist

AI Search

Employee Center Integrations

Access Employee Center capabilities beyond the portal to further enhance the employee experience.

Mobile  Access Employee Center through the NowMobile app.	Employee Center Pro Kiosk  Provide deskless workers with simplified access to information and services for self-service.
Employee Center for Microsoft Viva  Deliver the ServiceNow employee experience into the Microsoft Viva Connections dashboard.	Employee Center for Zoom  Enable employees to access Employee Center capabilities from the Zoom client app.

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Employee profile integration with for Microsoft Teams  Show the current statuses of employees on their respective Employee Profile pages.	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Now Mobile experience for Employee Center

The Employee Center mobile capabilities enable employees to stay connected regardless of when, where, and how they are working.

Install the Now Mobile application from ServiceNow Store to install the default taxonomy for the Employee content store application. This application auto-assigns the Employee taxonomy to the Mobile Employee Service portal (MESP) record.

Curated experiences on Now Mobile

The following are the features that are delivered to give you a curated experience on your mobile device.

Help Center

Unifies the help content, such as requests and articles across multiple departments.

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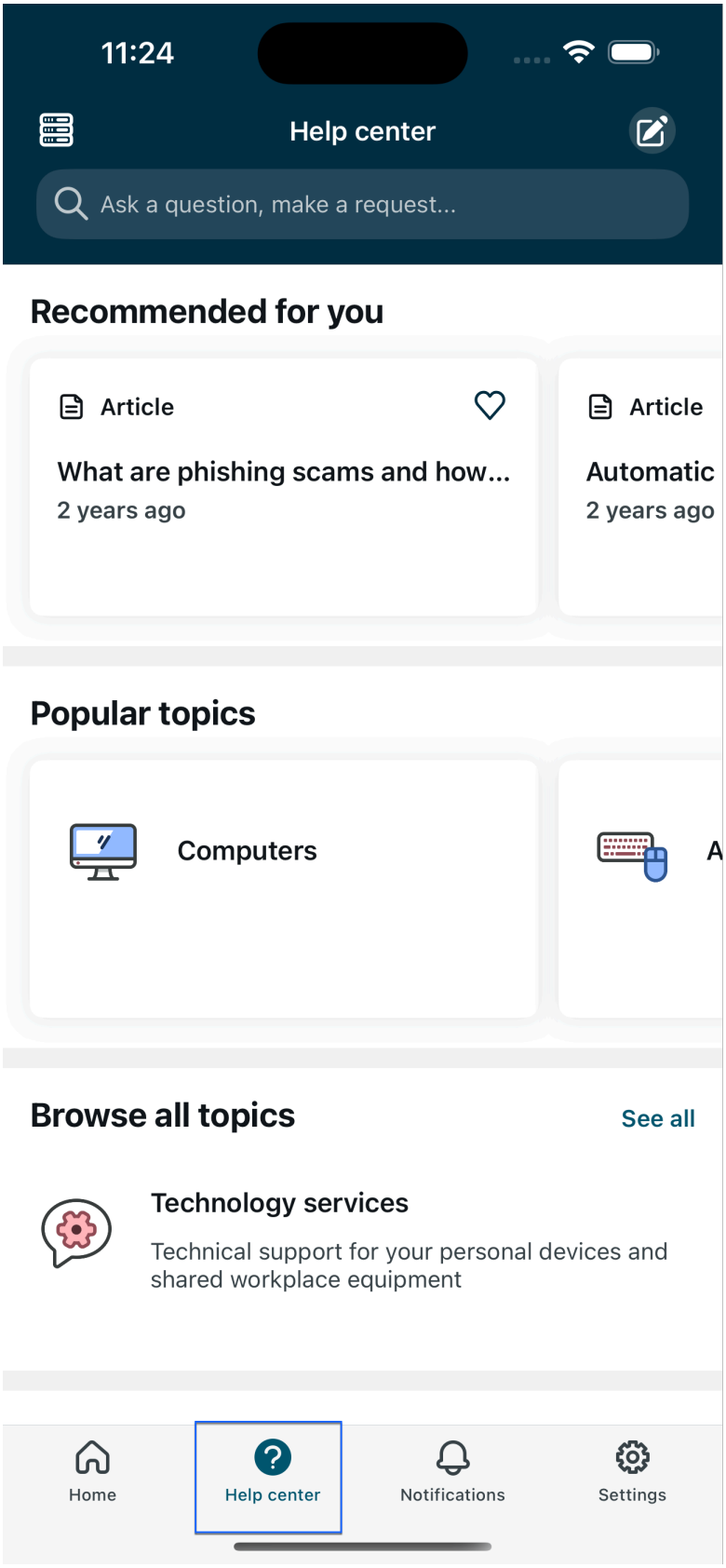

Popular topic section

Displays up to six popular topics based on content popularity.

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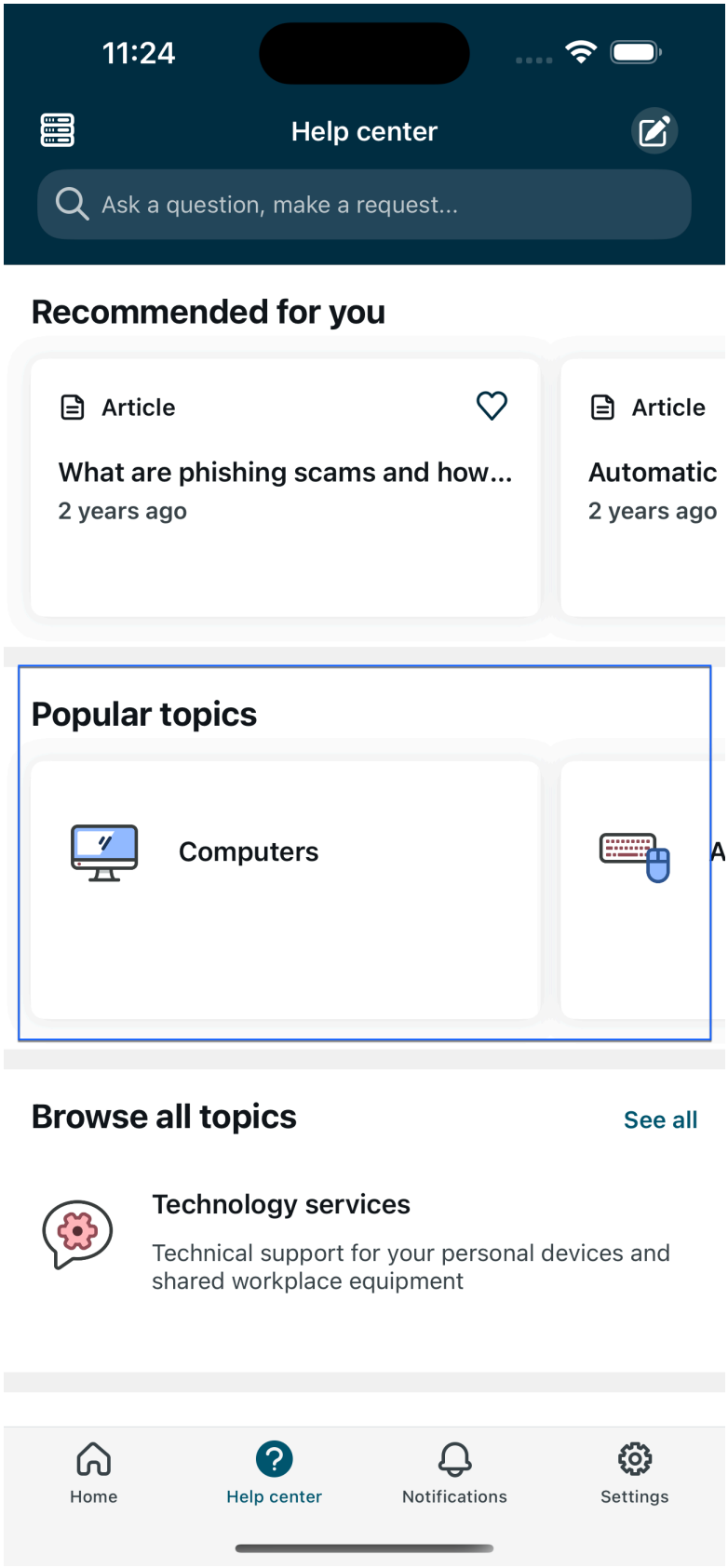

Browse experience

Displays the first 10 root topics for the taxonomy associated to the MESP portal record.

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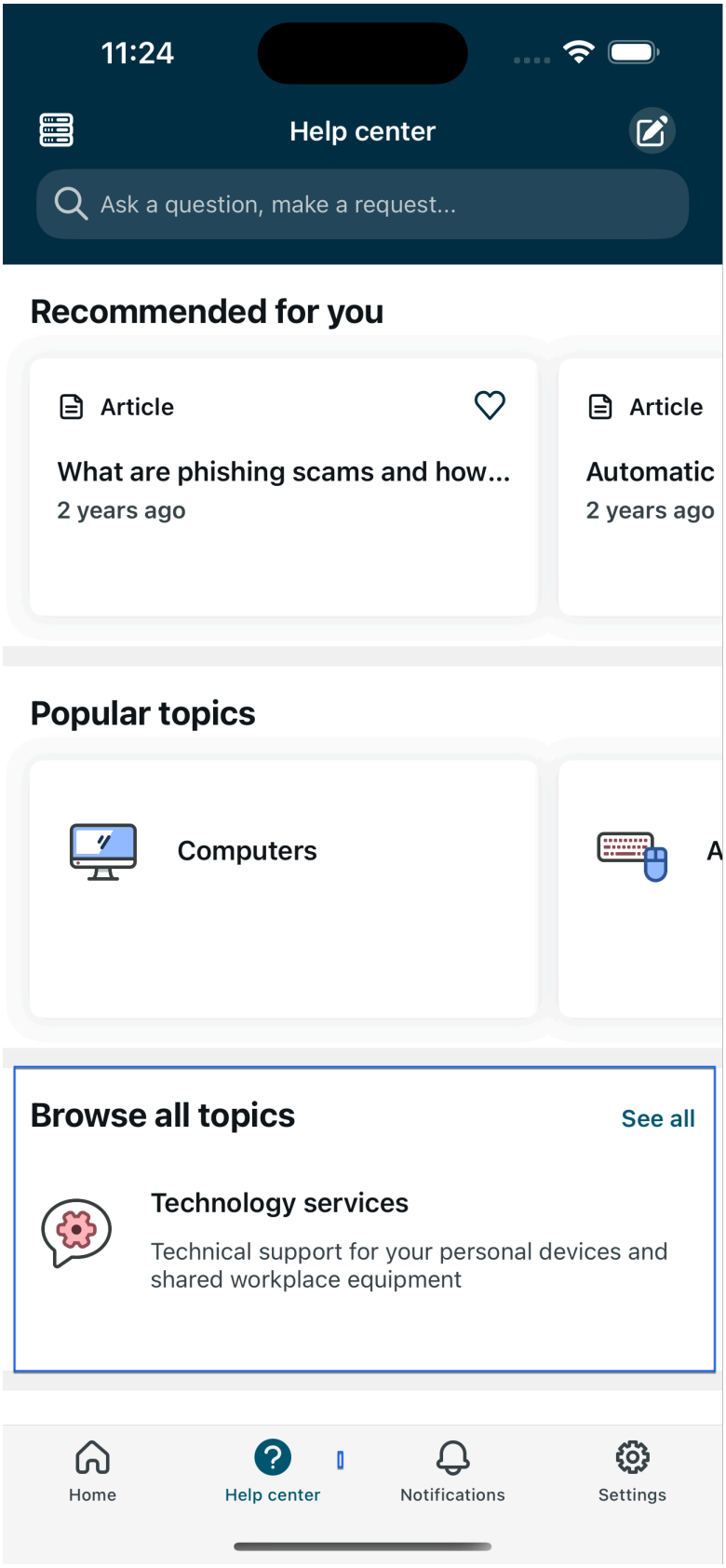

Employee Profile on Now Mobile

You can view the employee profile details, such as, **About**, **Bio**, **Personal information**, and **Employment details** on Now Mobile.

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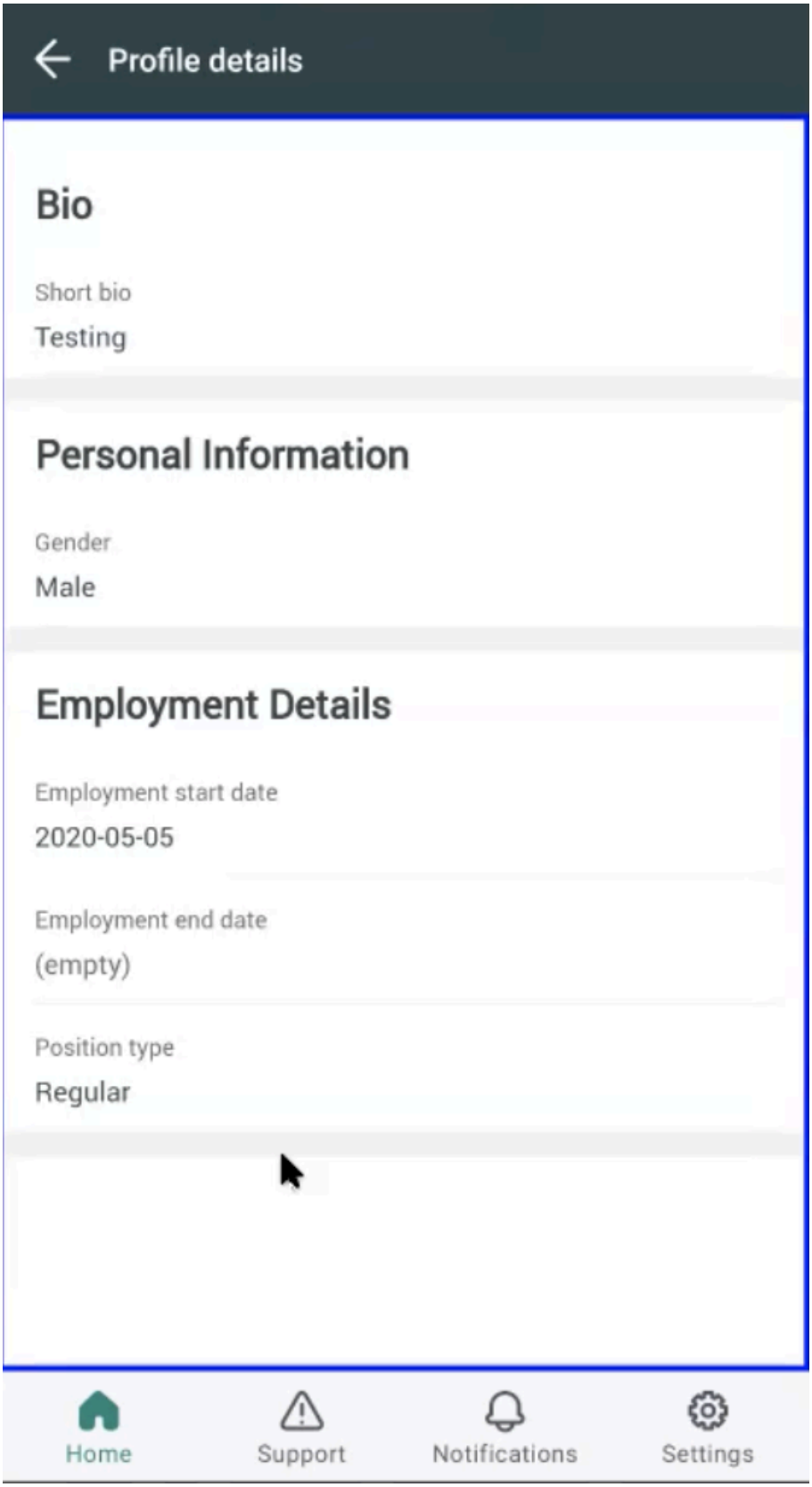

Quick links

Use the helpful quick links available on the home page.

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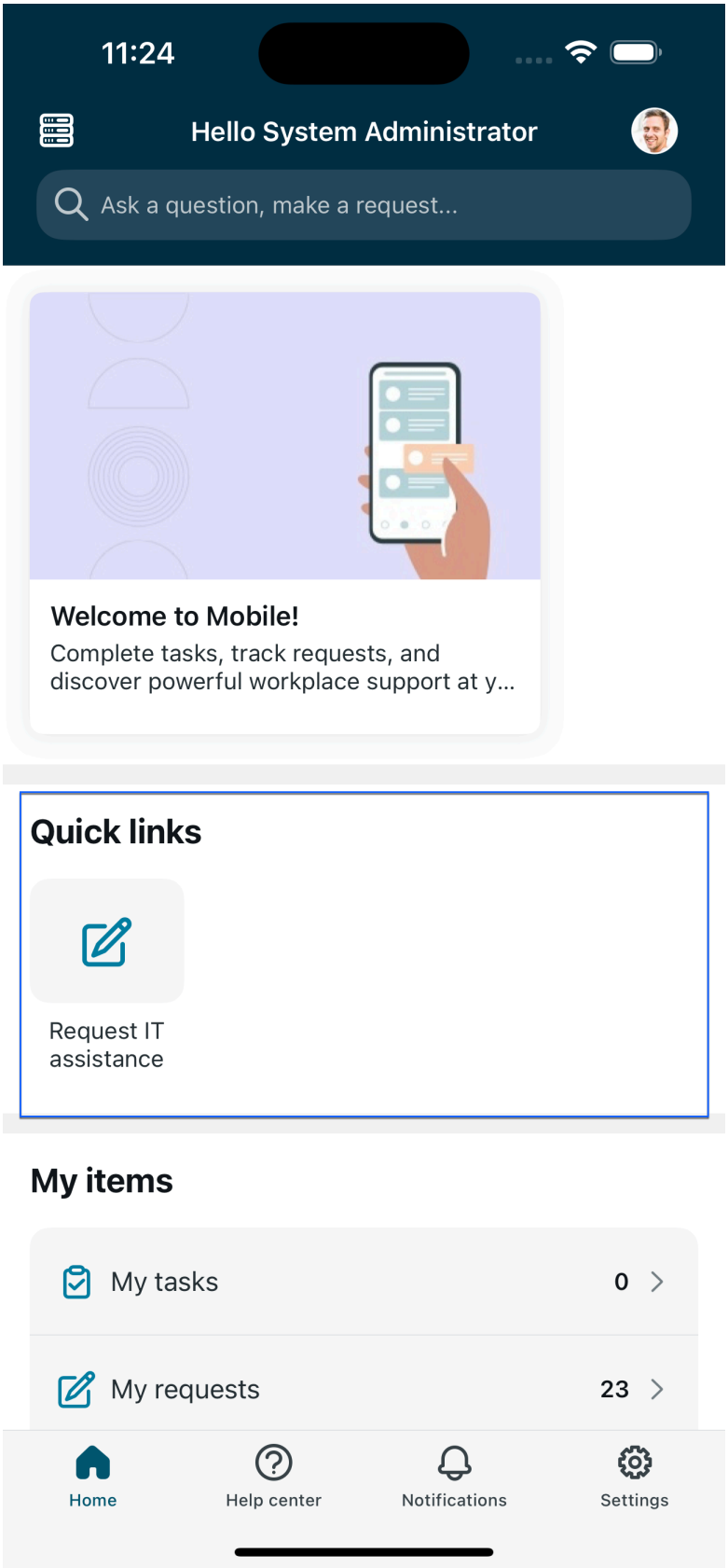

For more information on configuring for Employee Center, see Configuring Employee Center for mobile.

Related topics

Exploring Employee Center Pro

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Integrated service and experience feedback in Now Mobile®

Integrated service and experience feedback in Now Mobile® provides greater ease of access to the users to provide their feedback on their user experiences and their service experiences.

Experience feedback

A default experience feedback configuration is available with Employee Center Pro version 32.0.

In the **More** menu options in the Now Mobile® app, you see the option to **Provide feedback**.

The default version of the feedback asks for your experience with static questions and a **Submit** button that is enabled when you have selected an option. You can also add comments along with selecting the static feedback option.

Similar to the portal, you have the option not to share your personal information, while submitting the feedback.

A success message displays on the screen when the feedback is submitted.

If the feedback you provided is beneath or equal to the rating threshold set by your organization, a feedback task is triggered.

Service feedback

When you raise a request for a Service Catalog item or go to a topic page and access a Knowledge Base article, you see that a rating-based service feedback is prompted.

Similar to the experience feedback in Now Mobile®, you can choose not to share your personal information while providing the service feedback.

You can configure more feedback configurations and definitions apart from the ones available by default.

- For more information on creating a feedback configuration, see Set up the feedback configuration.
- For more information on creating a feedback definition, see Set up the feedback definition.

Recommended for you in Now Mobile

Recommended for you section is available on Now Mobile app, providing quick access to the section through mobile bringing in more flexibility of usage for customers.

View knowledge articles and catalog items recommended for you on the support tab of the Now Mobile app.

Recommended for you for Now Mobile app lets the user easily access relevant items and knowledge articles on the app itself.

By default, top five recommendations are visible on the widget, at once. The widget gives the user a preview of a knowledge article, showing the title, description, and the time-lapsed since it was added to the recommendations. Similarly, the catalog items show the description and the price of the product, if any.

Also, there is a **Favorite** icon available to add a card to your favorite list.

The article or the catalog item opens in a Mobile Employee Service Portal (MESP) view when a user clicks any recommendation.

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If the customer is not using either the HR profile plug-in or the Employee profile plug-in, the recommendations are provided based on the popularity of the content pulled from the M2M connected content. The recommendations, in that case, are dissimilar to the ones provided if the HR profile or Employee Profile plug-in is installed.

Note:

The default validity of the recommendations is for six months on the Now Mobile app.

For more information on configuring Recommended for you, see Recommended for you.

Search topic content in Now Mobile app

The search functionality for topic content is available on the Now Mobile app.

You can search for Knowledge Base articles, Service Catalog items, and Learning content available on the topic pages with the search functionality.

You can quickly look for any desired result using different filter and sort options that help with easier content discovery.

To access the search functionality for topic content in the Now Mobile app:

Note:

- You must upgrade to Utah release and install the Now Mobile version 28.
- You must enable the AI Search functionality.

News in Now Mobile

News articles are available in Now Mobile to provide easy access to consumable content, on-the-go.

Get the news experience on mobile with Employee Center on the Now Mobile app. View news articles on-the-go on your phone.

View news articles from the Featured news section or go to the **News center** tab. Scroll through the Featured news carousel to view all the featured articles on the News center MESP page.

You can select any news article to see the entire article open on the news details page. Scroll down to read the entire article on your phone. The news details page shows when the article was last updated. It also displays the **Favorites** icon ♡ to add it to your list of favorite articles.

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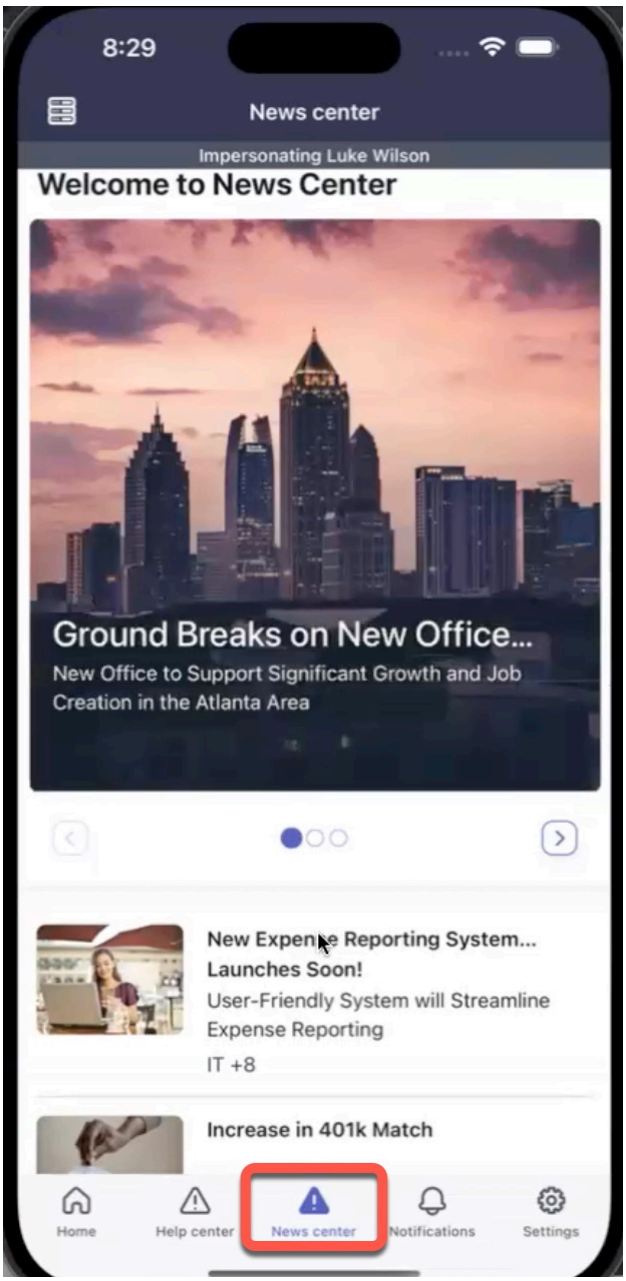
News center in Now Mobile



If you want to browse the articles by categories, you can use the Categories section at the bottom of the news details page. All the categories associated to that article are displayed at the bottom of the page. You can also access all the categories at the bottom of the News center page, to search articles by categories. Use **Show more** to load more categories listed on the page.

You can associate a news article to a topic page to see it on the Related news section of that topic page in mobile.

Apart from the news articles, also access videos and calendar from the **News Center** tab.

For more information on news articles on the Employee Center portal, see News articles.

Now Assist genius results in Now Mobile®

Now Assist genius results in Now Mobile® helps provide a personalized way of using the search functionality.

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Now Assist genius results are a more personalized way of search as opposed to the traditional AI search experience.

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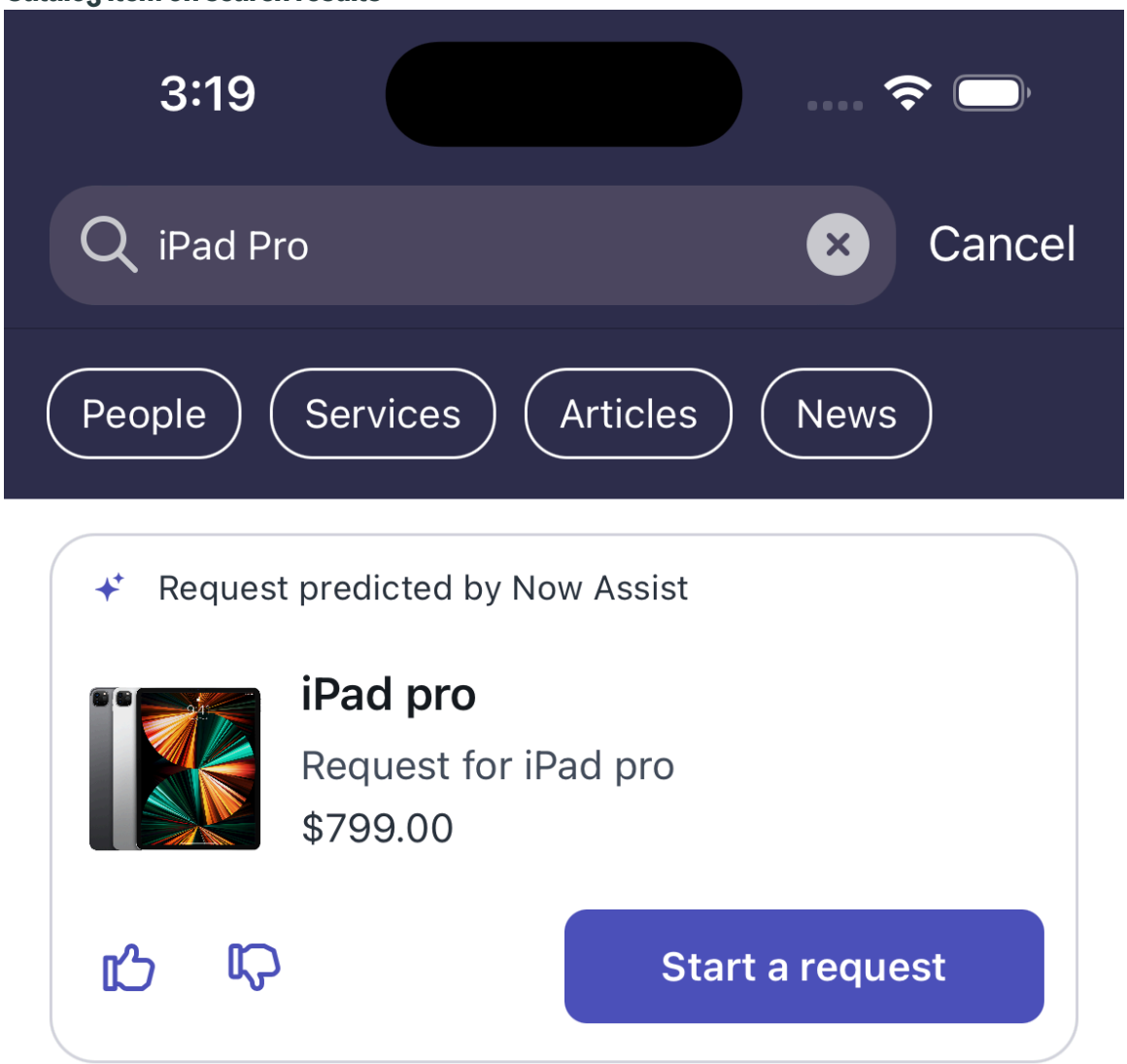
Catalog item on search results



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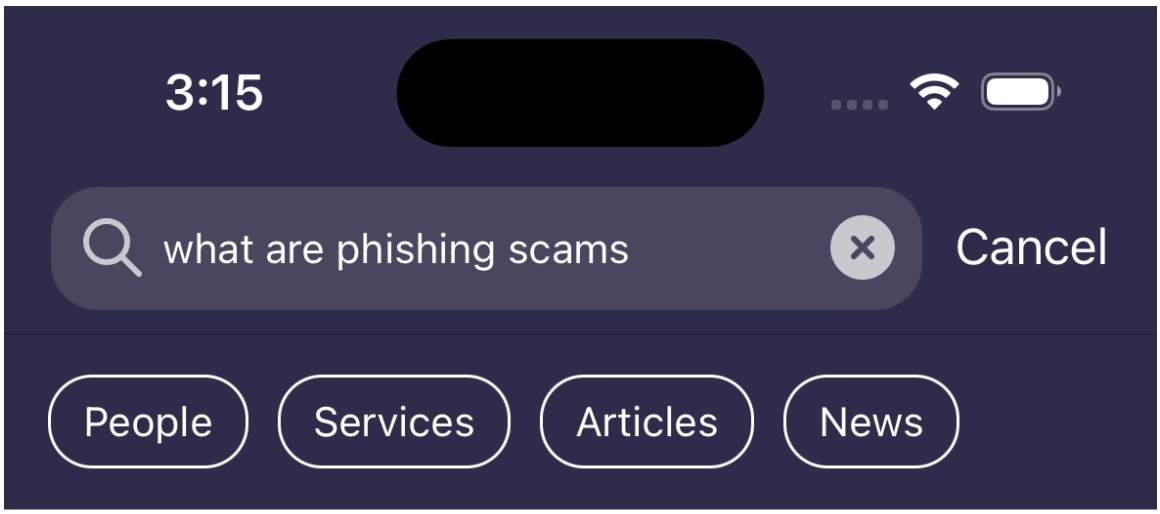
KB article on search results



Answer generated by Now Assist. Check sources for accuracy.

what are phishing scams

Phishing scams are fraudulent email messages that appear to be from legitimate enterprises, aiming to obtain private information such as passwords or credit card details by... Show more

Sources

What are phishing scams and how can I avoid them?...

107 Views

What is Spam?

10 Views

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The genius results include:

- Now Assist Actionable genius result: Request for a Service Catalog item by search.
- Now Assist Q&A genius result: View the entire Knowledge Base article with **Show more** functionality from the search results.

Note: You must enable the **Now Assist in AI Search Setup** in the required applications where you want to use genius results. For more information, see Enable Now Assist genius results.

Configuring Employee Center for mobile

Configure Employee Center capabilities on Now Mobile to help employees utilize the employee-centric content experience. This configuration enables all services, information, and support tabs.

Next Experience theme for Now Mobile

Next Experience delivers a next generation, intuitive, personalized experience to drive productivity, improve engagement, and surface insights across the ServiceNow AI Platform.

You can configure Next Experience on Now Mobile.

- Provide a better accessible Next Experience on Now Mobile.
- Offer consistent experiences across web and Now Mobile.
- Provide a unified design experience across applications.

Summary of enhancements

The following list provides a quick summary of the improvements as part of Next Experience.

- Use the new layout, screens, and card designs for accessibility and intuitive experience.
- Provide a consistent experience on web and mobile with the updated MESP portal theme that aligns with the next experience theme.
- Set the value of glide.ui.polaris.experience to true to enable the new color variables. A fallback color hex code is used when the new experience is not enabled.
- Use the color variables for UI rules, card templates, and icons.
- Enhance the search and discovery of the content and people.
- Improve accessibility with the new input form screens for functions instead of UI parameters.
- Convert the Content section to the Record section (sys_sg_item_section) to enable the display of each item as a card (mobile view).
- Make the MESP portal record editable. Admin can now configure and apply the custom theme for MESP portal to provide a unified experience across native mobile and MESP.

Enable AI Search upgrade considerations

From Utah, AI Search is the default search engine on Now Mobile.

For existing customers, when you upgrade to Utah, you continue to use your existing search engine for Now Mobile as it was before the upgrade.

- Glide fix runs before the plugin upgrade where the current search engine is stored in a system property sn_me_search.search_engine.
- After plugin upgrade, another glide fix runs to set the value of search engine to sn_me_search.search_engine property value, provided this value is not empty.

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MESP (Webviews) upgrade considerations

From Utah, Next Experience is the new theme on the MESP. For the existing customers, when you upgrade to Utah, the theme adoption works in the following manner:

- When you have not branded the Now Mobile app and enable the Next Experience option, the new theme applies automatically on the MESP portal record.
- When you have not branded the Now Mobile app and do not turn on the Next Experience option, the new theme is not applicable on the MESP portal record.
- When you have branded the Now Mobile app; irrespective of the turning on or off the Next Experience option, the new theme is not applicable on the MESP portal record.

MESP (Webviews) upgrade scenario descriptions

Upgrade scenario	Description
If you are upgrading from Tokyo to Vancouver, when the glide.ui.next_experience.opt_out and the glide.ui.polaris.experience are set to true	Update the MESP record manually to use the Next Experience theme.
If you are upgrading from Tokyo to Vancouver, when the glide.ui.next_experience.opt_out and the glide.ui.polaris.experience are set to false	Update the MESP record manually to use the Next Experience theme.

Now Mobile native upgrade considerations

Here are the Now Mobile upgrade considerations for various Employee Center Applications. When you make changes at the mapping level, the latest changes are not available out-of-the-box.

- Apps compatible with Utah: Now Mobile, Webviews for mobile, Search configurations for mobile, and Tasks for mobile.
- Apps compatible with Utah, San Diego, and Tokyo family releases: Employee Center, Employee Center Core, Employee Profile, and Content Publishing.

Now Mobile native upgrade considerations table

Upgrade scenario	Description
For apps compatible with Utah	When you upgrade to Utah, Next Experience is installed without any additional steps.
For apps compatible with Utah San Diego and Tokyo, with Next Experience changes installed and upgraded to Utah	For pre-Utah, Next Experience changes are not applied. • Use the glide fix to automatically revert Next Experience changes. • After the instance is upgraded to Utah, you can manually run the uptake scripts for each app to uptake Next Experience changes.
For apps compatible with Utah San Diego and Tokyo, without Next Experience changes installed and upgraded to Utah	When you upgrade to Utah, Next Experience is installed without any additional steps.

Run the following fix scripts manually by setting the *runManually=true* to revert Next Experience changes for each application.

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Next Experience revert fix script description table

Fix script	Application
Mobile Revert Next Exp - Cont Pub	Content Publishing
Mobile Revert Next Exp - EC	Employee Center
Mobile Revert Next Exp - EC Core	Employee Center Core
Mobile Revert Next Exp - EP	Employee Profile
Mobile Revert Next Exp - Now Mobile	Now Mobile
Mobile Revert Next Exp - NowMobileSearch	Search Configurations for mobile

Run the following fix scripts manually by setting the *runManually=true* to uptake Next Experience changes for each application.

Next Experience uptake fix script descriptions table

Fix script	Application
Mobile Next Exp - Cont Pub	Content Publishing
Mobile Next Exp - EC	Employee Center
Mobile Next Exp - EC Core	Employee Center Core
Mobile Next Exp - EP	Employee Profile

Employee profile for Now Mobile

Employee profile on Now Mobile provides customizable and compact information about employees and their organizational hierarchy.

You must opt in to the employee profile as well as upgrade to the new Now Mobile app to access these new features.

Customers who opt in to the new employee profile have the **View more profile details** button on the **About** tab. The **View more profile details** button is only visible to the logged-in user, Selecting **View more profile details** opens the Profile details page.

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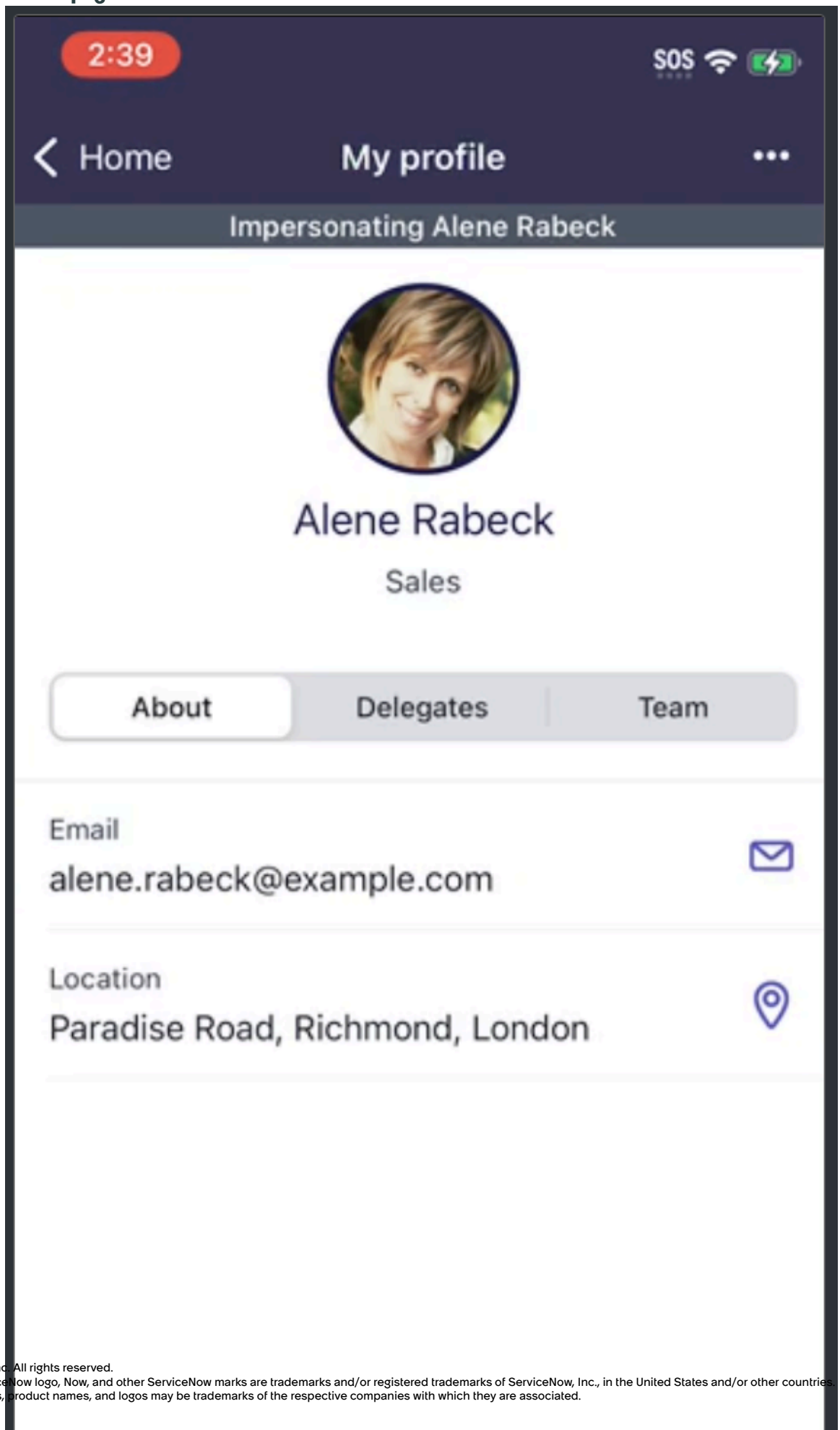
Profile page



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The **Team** tab is the mobile version of the My Team widget on the employee profile page in the Employee Center portal. This tab lists **Manager**, **Direct reports**, and **Coworkers** depending on the logged-in user. The default number of results shown in each section is five. To see more results, select **See all**.

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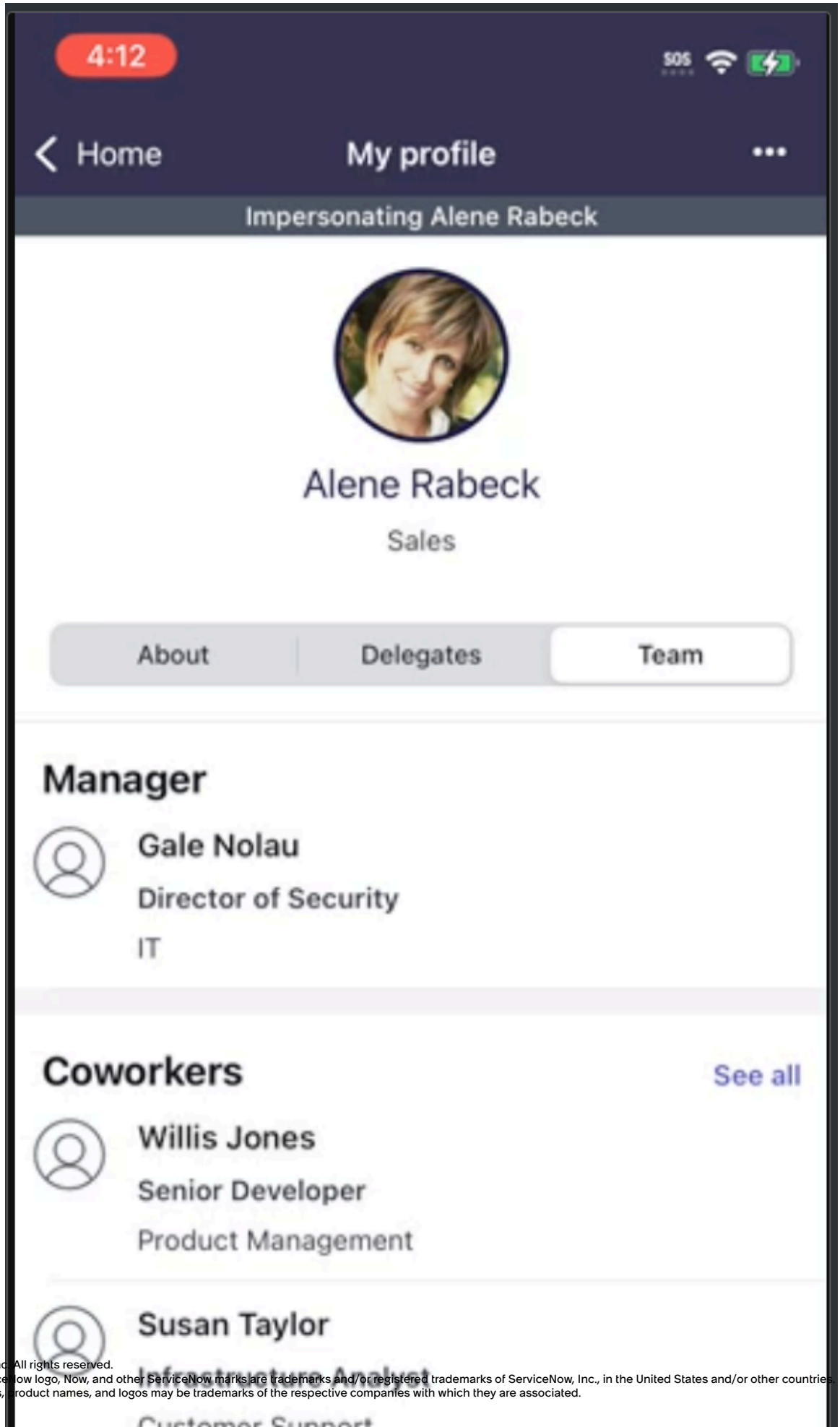
Team tab



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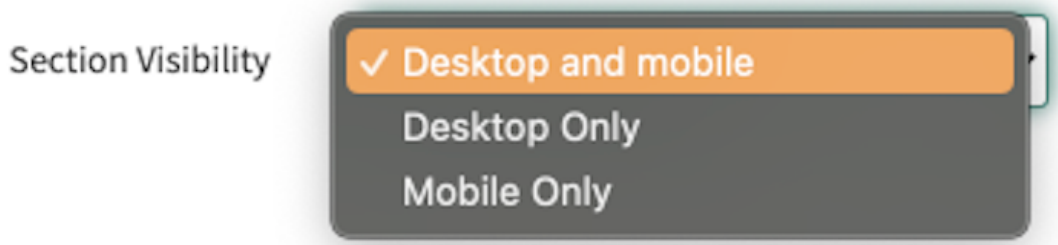
The Profile details page includes the About, Bio, and Personal information sections by default. An admin can customize these sections across several business units on the platform. The default **Section Visibility** settings for About and Bio are available for the **Desktop**. An admin can change the visibility as required.

Select any user card on the **Team** tab to view the user details.

You can also search for employees by typing their name in the search bar provided on the home screen of Now Mobile.

Section Visibility options



Note: The admin can configure the **Section Visibility** settings for the Profile details page on the employee profile application by navigating to **All** > **Employee Profile** > **Overview UI Configuration**.

Note: If a customer upgrades the employee profile but does not have an upgraded Now Mobile app, then the search redirects to the older profile page.

You can avoid this redirection by upgrading to the new Now Mobile profile page.

For more information on configuring Employee profile, see Employee profile.

Upgrade search redirection to the new Now Mobile profile page

Upgrade to the new Now Mobile profile page for an enhanced user-navigational experience.

Before you begin

Role required: admin

About this task

Update the function instance manually to redirect ServiceNow® AI Search to the new Now Mobile profile page.

Procedure

1. Navigate to **System Mobile** > **Now Mobile App** > **Applet Launcher**.
2. In the launcher screen list, select **Homepage**.
3. Navigate to **Header** > **Search config**.
4. Select the **Preview this record** icon to open **Search config**.
5. In the **Search config** page, go to the List Item Configuration list and select **People Genius Search Main Item**.
6. In the People Genius Search Main Item list, go to **People genius result redirection**.
7. Update the **Order** to **200** to prioritize search redirection to the Now Mobile profile page.

Note: You can also update the **value** to **200** at `/sys_sg_button_instance.do?sys_id=510879044d0c2010f87749679b4774e8`

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Result
The search redirection takes you to the new Now Mobile profile page.

Configure Now Mobile® Home page

Configure the widgets on the Now Mobile® home page Quick links, My items, and My favorites.

Configure My items

Set up My items on the Now Mobile® application to access all your tasks, requests, and other personal resources like assets and purchases from one place.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **System Mobile** > **Now Mobile App** > **Applet Launchers**.
2. In the Launcher screens page, select **Homepage**.
3. In the Homepage screen, go to the **Body** tab and select **My items**.
4. In the Launcher section mapping page, select **Preview this record** on the **UI section**, which should display **My items**.
5. In the Icon section page, go to the **Icon section destinations** tab, select **New**, and create as many items you would like to display to on the My items section.
   Set up the icon sections, colors, destinations from the **Icon section destinations** tab. You can also use the Mobile App Builder to get a more holistic view while configuring. For more information, see Configure an icon UI section.

Result
You have set up My items on your Now Mobile® application.

Configure Quick links for Now Mobile®

Configure Quick links for Now Mobile® to provide your employees with quick access to important forms, links, and other data.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **System Mobile** > **Now Mobile App** > **Applet Launchers**.
2. In the Launcher screens page, select **Homepage**.
3. In the Homepage screen, go to the **Body** tab and select **Quick links**.
4. In the Launcher section mapping page, select **Preview this record** on the **UI section**, which should display **Quick links**.
5. In the Icon section page, go to the **Icon section destinations** tab, select **New**, and create as many items you would like to display to on the Quick links section.
   Set up the icon sections, colors, destinations from the **Icon section destinations** tab. You can also use the Mobile App Builder to get a more holistic view while configuring. For more information, see Configure an icon UI section.

Result
You have set up Quick links on your Now Mobile® application.

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Popular topics in Now Mobile®

Popular topics displays the most sought out information employees have searched for, in one place, providing quick access to important information.

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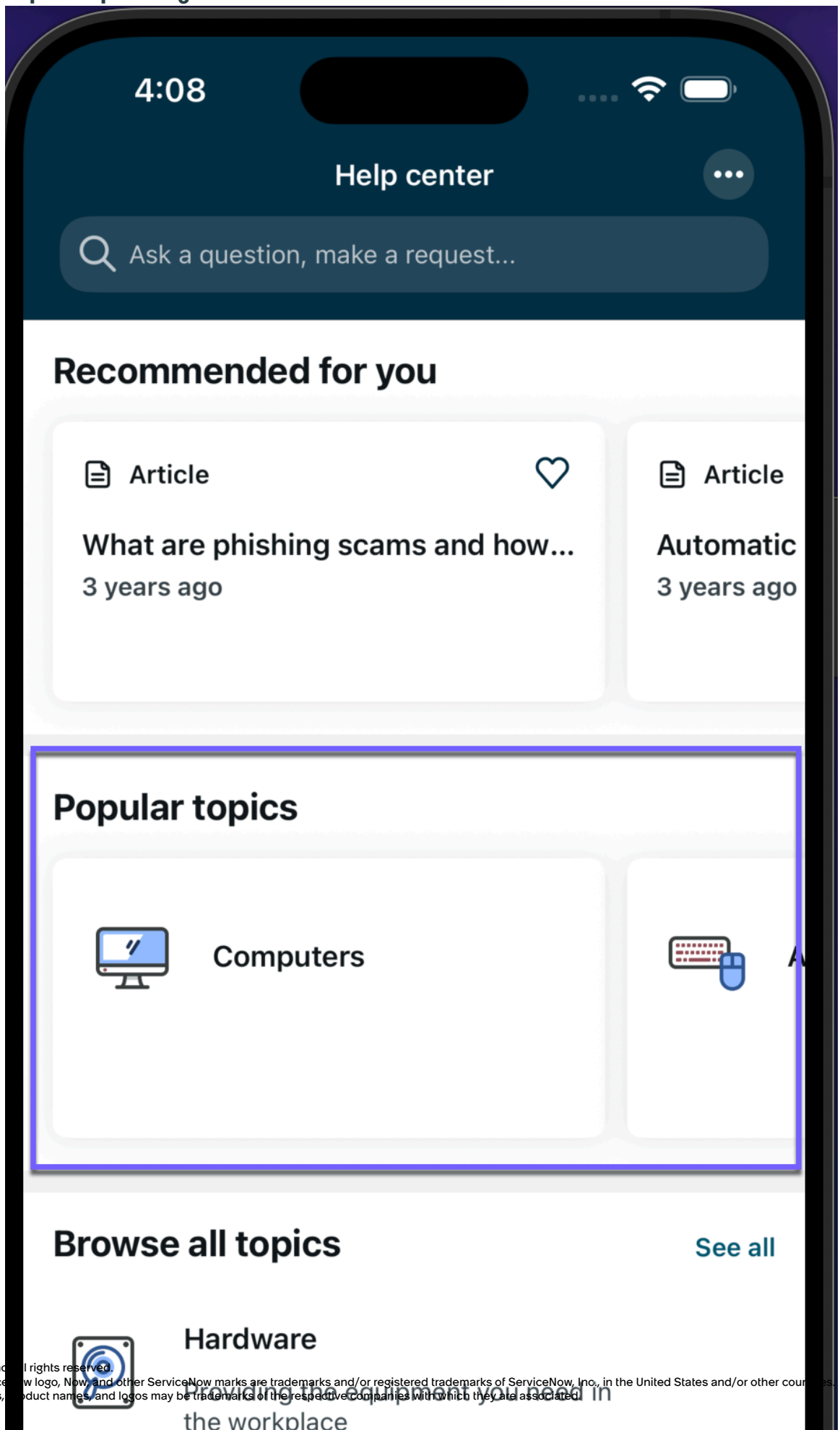
Popular topics widget



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Employee Center uses an algorithm to determine which topics appear on the widget. Popular topics widget contains topics, Service Catalog items and Knowledge Base articles that have been viewed the most number of times, and have higher popularity. Now Mobile® uses the same algorithm used on the portal.

The popularity is calculated based on a scheduled job that runs daily. The algorithm takes into account all the search history for different topics since the configuration of the Employee Center portal.

For more information on the Popular topics configuration, see Popular topics widget.

Approvals in Now Mobile

View all your approval tasks in one place in the Now Mobile app.

Access all your approval tasks under **My Tasks** section in Now Mobile.

- Approve or reject after checking the details of an approval task on the **Details** tab.
- Use the **Updates** tab to provide your comments, view comments from someone, or add or see an attachment relevant to the approval task.
- View the due date information of each task on the list view under **My Tasks** and on the details pages of individual approval tasks.

If you want to reject an approval task, you must provide a reason to submit it. Comments are optional when you approve a task.

The order of priority for the information displayed on the list view in **My Tasks** is as follows:

1. Short description
2. Approval For
3. Approving

Generic approval

The generic approval that is shipped with the Now Mobile version 29.0 displays all the approval tasks available on the Approval [sysapprover_approval] table.

Users with an approver role can access all their approval tasks in the Now Mobile app under **My Tasks**.

Note: The Generic approval is enabled in the base system as:

- The system property, sn_me_todos.all_approvals_mobile_enabled, is enabled by default.
- The system property, sn_me_todos.all_approvals_mobile_enabled, can be disable to stop using the generic approval card.
- If you want to create a custom approval card within the Approval To-dos list, the value of the **Condition order** field of the custom configuration must be lower than the **Condition order** of the Generic approval card.

For more configuration info, see Enable task configuration for approvals.

Enhanced Requests Experience on Now Mobile

You can get the Enhanced Requests Experience on the Now Mobile app, bringing the full request management capabilities from the Employee Center portal to mobile. Employees can view, search, filter, and manage their requests on the go.

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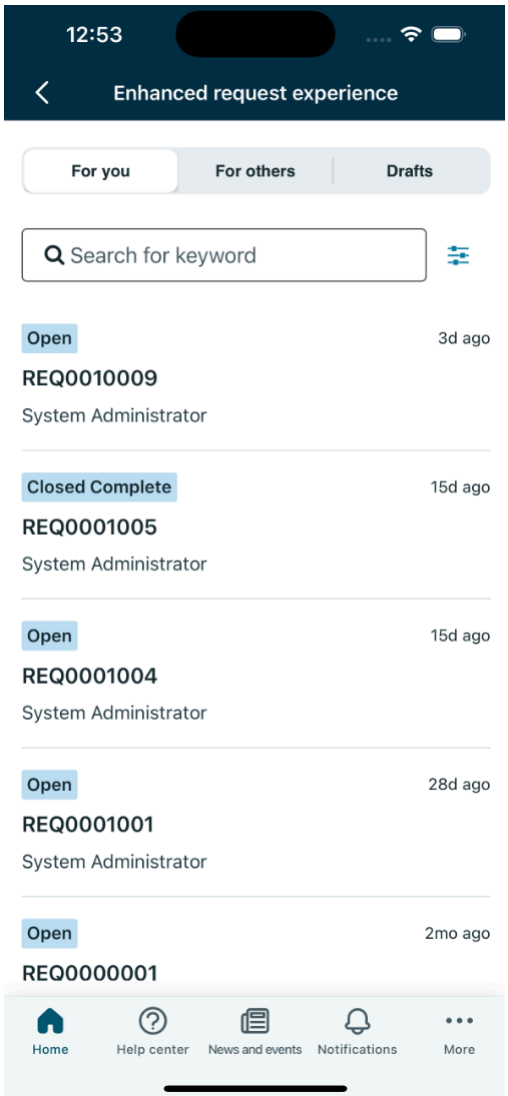
You can directly view your Enhanced requests experience from the Now Mobile homepage. Under **My items**, select **Requests**.

Important: To get the Enhanced Requests Experience on the Now Mobile app, you must opt-in for the setup. For more information, refer to Opt in to the enhanced Enhanced Requests Experience.

Requests

The Enhanced requests experience page gives you a consolidated view of all your requests on your mobile device. You can switch between tabs to see requests relevant to you, and use the search bar and filter options to quickly find what you need. Each request shows key details like its status, title, number, and when it was last updated, making it easy to stay on top of your requests at a glance.



Tabs

The Enhanced requests experience page supports multiple tabs to help you view requests by type. Each tab shows a relevant set of requests, making it easy to switch between views. You can view any additional tabs configured based on your organization requirements by selecting the Show more icon.

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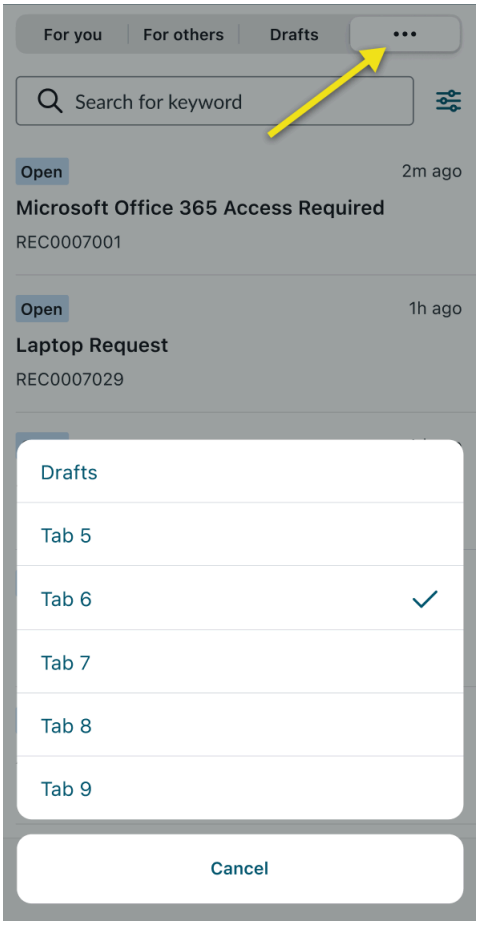

The following default tabs are available:

- **For you**: Displays requests created for you or by you.
- **For others**: Displays requests you have created on behalf of others.
- **Drafts**: Displays requests saved as drafts that have not yet been submitted. You can open a draft request and submit it anytime.

Filters

You can apply filters to narrow down the relevant request. Select the Filters button ( ) to see requests of certain type. Apply filters based on their Request type, Status, Updated, Department, and Urgency.

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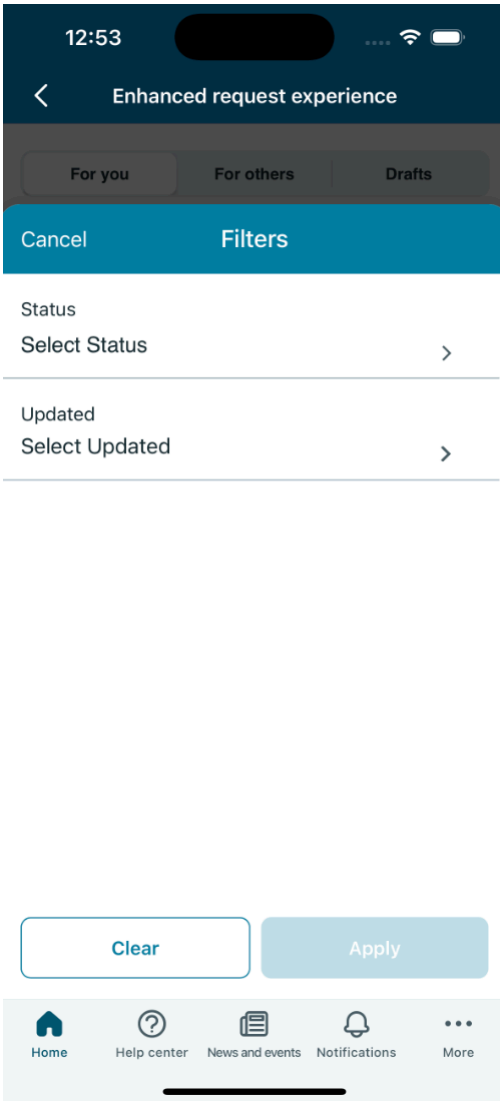

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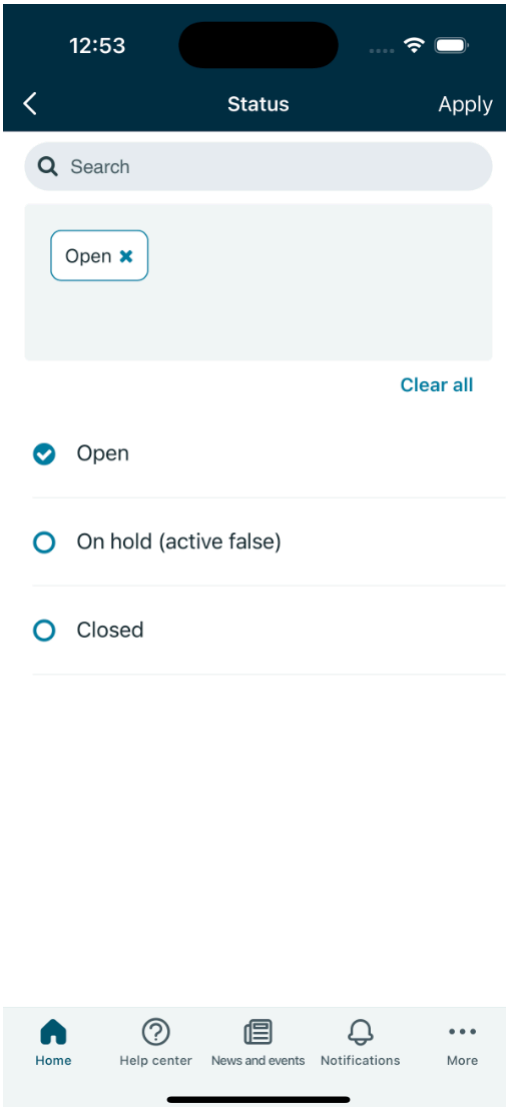

Search for keyword

Use the search bar to find requests by keyword.

Request details

Each request card shows key details at a glance, so you can track and manage requests on the go. Tap a card to view the full request details.

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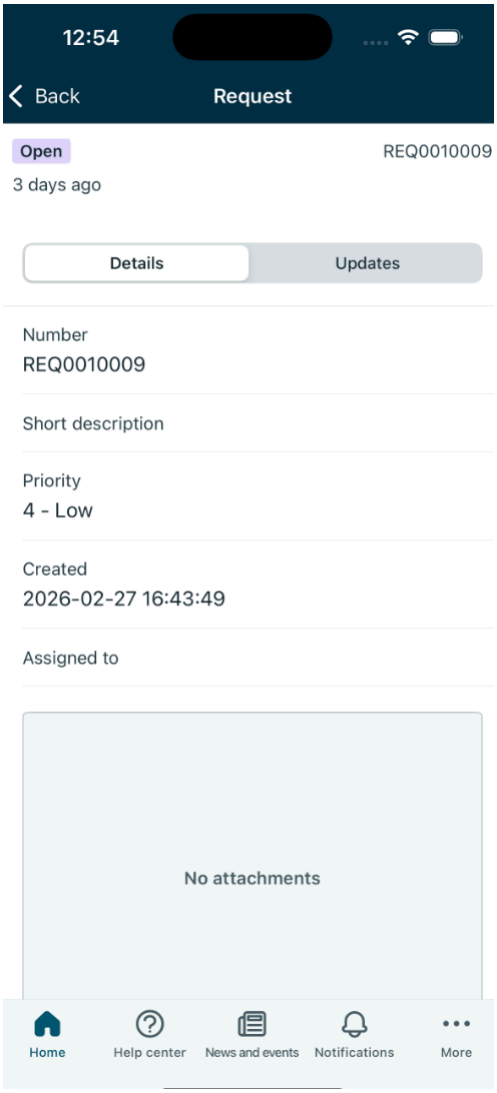

Each request card shows the following details:

- Request number
- Short description
- Status
- Last updated time
- Priority or urgency
- Department and Requested for fields

Related topics

Enhanced Requests Experience

Workday approvals in Now Mobile

Access your Workday approvals in the Now Mobile app, with Employee Center.

Receive all your Workday approval tasks under the **My Tasks** section with Employee Center on Now Mobile. Select an approval task to:

- Approve or reject the approval requests from your mobile.
- View the details of the approval request on **About** and **More details** tabs.

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- Check that any attachments added with the request on the **Attachments** tab.
- Navigate to the Workday portal to view the approval tasks on Workday.

The following approval types have default approve or reject buttons on the Now Mobile app. You can finish the approval task on the Now Mobile app for the following approval types.

- Time off
- Time off correction
- Termination
- Leave of absence

For the other approval types, often, more information is required to approve or reject the task. The approve and reject buttons aren't available for such approval tasks. You can select the **Complete In Workday** link to view the following task types in detail on the Workday portal.

- Job requisition
- Time sheet
- Compensation range
- Spend authorization
- Job change

Note: You can configure the approve and reject button to display in Now Mobile for all the approval types. For more information on the configuration, see Configure Workday approval functions for Now Mobile.

For more information on the configuration of the Workday approvals, see Configure Workday to-dos.

Configure Workday approval functions for Now Mobile

Configure the approve and reject buttons for all the Workday approval task types. Complete all your approval tasks in the Now Mobile app.

Before you begin

Role required: sn_hr_workday.admin

Procedure

1. Navigate to **All** > **System Mobile** > **Screens**.
2. Select **About** for the correct approval type.
   Check the corresponding **Description** next to **About** to know the approval type.
3. In the **Function instances belonging to screen** tab, turn the options to **True** as required.

   Note: The base system settings for a few approval types are set to false in the Now Mobile app. For more information, see Workday approvals in Now Mobile.

Result

Approve and reject buttons are displayed on the configured approval task types in mobile.

Configure mobile content

Configure mobile content such as banners, text cards, and video for content delivery or for use in campaigns. Mobile content is delivered to users that meet the audience criteria on Now Mobile.

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Before you begin
Role required: sn_cd.content_manager

About this task

Mobile content displays in a carousel section on the Now Mobile app to users that meet the specified audience criteria. You can configure mobile banners, text cards, and videos for content delivery or for use in campaign.

Procedure

1. Navigate to **All** > **Content Publishing** > **Mobile Content**.
2. Click **New** or open a record.
3. On the Mobile Content form, set the **Content type** field value to one of the following:
   - Mobile Banner
   - Mobile Text Card
   - Mobile Video

   For each content type, follow the applicable task.

For mobile banner

Configure content for a mobile banner.

Before you begin
Role required: sn_cd.content_manager

Procedure

1. On the Mobile Content form, set the **Content type** field value to `Mobile Banner`.
2. Fill in the fields on the form, as appropriate.

Mobile Content form

Field	Description
Title	Title of the mobile banner.
Content type	Set the value to `Mobile Banner`.
Image	Image to display for the mobile banner.
Link	Link to use with the mobile banner. The link displays when the user taps anywhere on the banner.
Header text	Header text to display for the mobile banner.
Text	Text to display for the mobile banner.
Order	Order in which the mobile content displays. Lower numbered content displays before higher numbered content.
Active	Option to activate the mobile content for use.

3. Right-click the form header and click **Save**.
   The **Schedule Content** related list displays.

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4. Schedule the content.
   - To schedule the content for delivery, see Scheduling the delivery of content.

For mobile text card

Configure content for a mobile text card.

Before you begin

Role required: sn_cd.content_manager

Procedure

1. On the Mobile Content form, set the **Content type** field value to `Mobile Text Card`.
2. Fill in the fields on the form, as appropriate.

Mobile Content form

Field	Description
Title	Title of the mobile text card.
Content type	Set the value to `Mobile Text Card`.
Link	Link to use with the mobile text card. The link displays when the user taps anywhere on the text card.
Header text	Header text to display for the mobile text card.
Order	Order in which the mobile content displays. Lower numbered content displays before higher numbered content.
Style	Style of the mobile text card: ○ Light ○ Dark
Active	Option to activate the mobile content for use.

3. Right-click the form header and click **Save**.
   The **Schedule Content** related list displays.
4. Schedule the content.
   - To schedule the content for delivery, see Scheduling the delivery of content.

For mobile video

Configure content for a mobile video.

Before you begin

Role required: sn_cd.content_manager

Procedure

1. On the Mobile Content form, set the **Content type** field value to `Mobile Video`.
2. Fill in the fields on the form, as appropriate.

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Mobile Content form

Field	Description
Title	Title of the mobile video.
Content type	Set the value to `Mobile Video`.
Link	Link to use with the mobile video. The link displays when the user taps on the area below the video.
Video link	Video to display for the mobile video. **Note:** Only YouTube and Vimeo links are currently supported.
Header text	Header text to display for the mobile video.
Text	Text to display for the mobile video.
Order	Order in which the mobile content displays. Lower numbered content displays before higher numbered content.
Active	Option to activate the mobile content for use.

3. Right-click the form header and click **Save**.
   The **Schedule Content** related list displays.
4. Schedule the content.
   - To schedule the content for delivery, see Scheduling the delivery of content.

Configure content roll-up on topics for Now Mobile

Browse through the associated content on the parent topic and its sub-tree topics. Enable the feature to see a wider range of results for your search on the Now Mobile app.

Before you begin
Role required: admin

About this task
Browse content directly associated to the topic that you're viewing along with the content on the sub-tree topics. With this feature, you can:

- Find associated content on topic pages easily.
- Search content with a broader result display with the results from the sub-tree topics.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties** > **sn_ex_sp.u_allow.rollup.mesp**.
2. Set the system property to **true**, and select **Save**.

Note: Verify the value is set to true to enable the feature. The default value is set to false.

Manage taxonomy for Now Mobile

Clone the default taxonomy or create your own taxonomy and map it to the Mobile Employee Service portal (MESP) to ensure the right taxonomy gets assigned.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Content Taxonomy** > **Taxonomies**
2. Click the default **Employee** taxonomy.
3. Click **Clone**.
4. Enter the **New Taxonomy Name** in the dialog box that appears and click **OK**.
   This copies the taxonomy and its contents to the new taxonomy. *Optionally*, you can manually create a taxonomy and add your topics. For more information, see, Create taxonomy
5. Modify the taxonomy content and click **Update**.
6. Deactivate the existing taxonomy so that the search configurations pick up the content from the new taxonomy.
7. Navigate to **Service Portal** > **Portals**.
8. Click **Mobile Employee Service Portal**.
9. In the **Taxonomy** tab related list, add the new taxonomy that you created.
10. Click **Update**.

Update search configurations

Search configurations are not automatically updated when you install the Now Mobile application. Manually run the fix script that is provided to update the search configuration to experience unified browsing on your mobile device.

Before you begin
Role required: admin

Procedure

1. In the Navigation filter, enter `sys_properties.list`.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Create a property of type **true/false** in the Now Mobile application scope.
   For example, create a property `enable_taxonomy`. For more information on creating system properties, see Add a system property .
3. Set the property value to **true**.
4. Navigate to **System Definition** > **Fix Scripts**.
5. Search for `Enable Taxonomy For Mobile`script and click to open.
6. Click **Run Fix Script** to update the search configuration.

> **Note:** If the default Employee Taxonomy is attached to the Mobile Service Portal, then run the **Set primary topics for Employee taxonomy** fix script to update the mappings.

Employee Center Pro Kiosk

Enable the field workers and shift workers with the in-context information for operational efficiency.

A deskless worker is an employee who typically doesn't sit behind a desk or use a computer to perform the job. Empowering deskless workers with resources is crucial for enhancing productivity, engagement, and overall organizational success.

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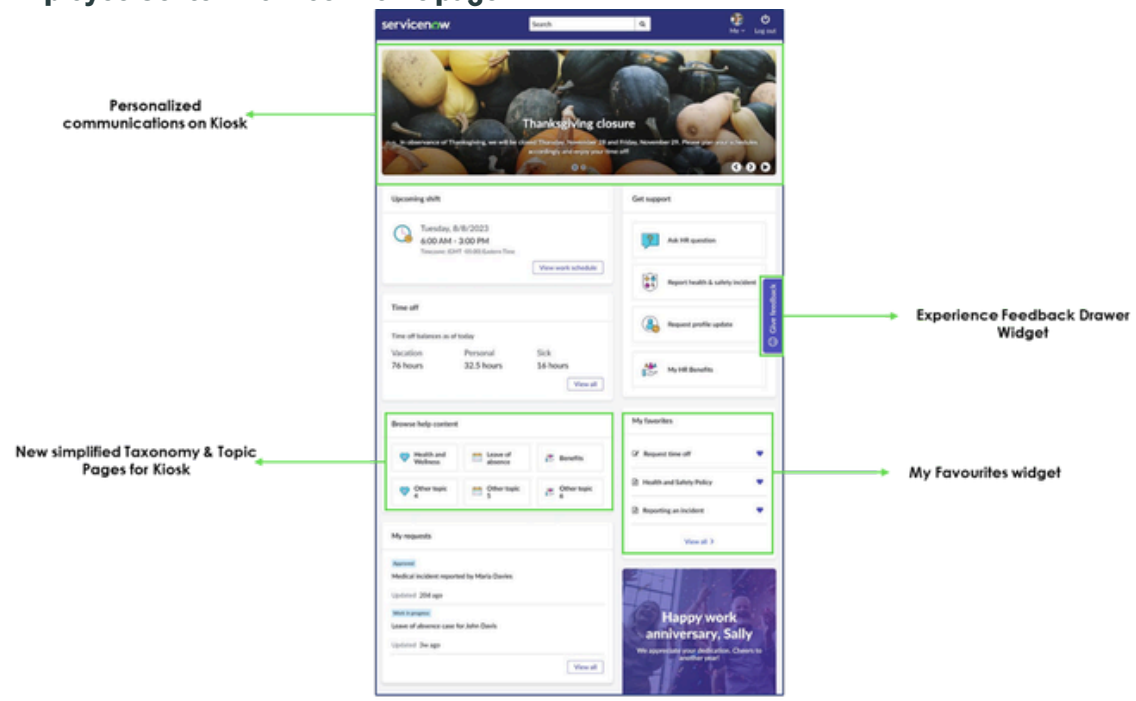
A new plugin Employee Center Pro Kiosk enables all such deskless workers with simplified access to information and services for self-serve and improved productivity.

Kiosk overview

Using the Kiosk application, deskless employees can manage their time off, schedule, and requests.

Employee Center Pro Kiosk home page



Employee Center Pro Kiosk Homepage

- **One-stop source**: Meet employees where they're and how they want to receive information and request services.
- **Guided experiences**: Empower the deskless employee workforce with relevant services and actions.
- **Personalized self-service experience**: Access relevant information and services that help with day-to-day work.
- **Feedback drawer widget**: Organizations can easily capture feedback on the Kiosk experience using the experience feedback drawer widget on the home page. For more information, see Integrated experience and service feedback.

Note: Employee Center Pro Kiosk (sn_ex_sp_pro_kiosk) home page is available with Employee Center Pro (com.snc.employee_center_pro) license.

Access all your information and services from a unified location from external applications such as Ultimate Kronos Group. Installation of the HR Service Delivery with the UKG plugin (com.sn_hr_ukg) provides a default setup of the UKG spoke. For more information, see Integrate with the UKG spoke.

Prerequisites

This portal supports displaying timeoff balance, employee schedule, my requests, and get support for deskless workers. Employee Center Pro Kiosk has a dependency on the following applications.

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Note: Ensure you activate these applications first before installing the Employee Center Pro Kiosk app from ServiceNow Store.

- Employee Center Pro (sn_ex_sp_pro)
- Employee Center (sn_ex_sp)
- Employee Experience Foundation (sn_ex_emp_fd)
- Employee Profile (sn_employee)
- HR Service Delivery Integration with Ultimate Kronos Group (sn_hr_ukg)
- UKG Spoke (sn_kronos_spoke)

Note: Installation of the com.sn_hr_ukg plugin provides a default setup of the UKG spoke.

- (Optional) Health and Safety Incident Management

Note: To report health and safety, activate the plugin and apply the `sn_ohs_im.reporter` role.

Kiosk users and roles

Roles required for Kiosk

User roles	Required role
Kiosk admin	sn_hr_sp.esc_admin
Kiosk user	sn_ex_sp_pro_kiosk.user
Employee profile admin	sn_employee.admin

Note: Ensure that the users have the `sn_ex_sp_pro_kiosk.user` role to access the Kiosk portal.

Related topics

Use Employee Center Pro Kiosk

Integrated experience and service feedback

Employee Center Pro Kiosk benefits

Enable the field workers and shift workers with the in-context information for operational efficiency.

Providing resources for deskless workers is essential for boosting productivity, engagement, and organizational success.

- Access information and use services.
- Provide self-service options such as raising and tracking requests.
- Help with shifts, time off, and pay information and other industry-specific needs and use cases.

Benefits

Employee Center Pro Kiosk is a centralized platform that helps employees with essential services and information. The Kiosk offers a user-friendly interface that presents relevant details and options tailored to the deskless employees needs.

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- **Shift information**: Displays the shortest and upcoming work shift info with the date and time on the home page. Go to the shift page to see detailed information to plan and manage work routines productively. For more information, see Schedule in Employee Center Pro Kiosk.

  You can use instance options to change the display preferences. For more information, see Modify the Upcoming shift widget display.

- **Time off balance**: Helps employees with the available time off balances such as casual and sick leave. This information helps employees plan and manage their time off effectively. For more information, see Time off balances in Employee Center Pro Kiosk.

  You can use instance options to change the display preferences. For more information, see Modify the Time off widget display.

- **Get support**: Provides employees with quick access to various services and requests such as:
  - Ask HR Question: Allows employees to submit queries or seek assistance from the HR department.
  - Request Profile Update: Allows employees to request updates or changes to the employee profile information.
  - Report Health and Safety Incident: Provides a convenient way for employees to report any health and safety incidents or concerns.

    Note: With the Health and Safety Incident Management plugin, you can report health and safety with the `sn_ohs_im.reporter` role.

  For more information, see Get support.
- **Browse help topics**: Allows employees to request updates or changes to the employee profile information.

  You can use instance options to change the display preferences. For more information, see Modify the Browse help content widget display.

- **My Favorites**: Allows employees to mark useful information as favorites.
- **Guided Self-service**: Guides employees to self-serve with step-by-step assistance and to navigate their way to the relevant article or catalog item. For more information, see Guided Self-Service in Employee Center.
- **My requests**: Allows employees to track the progress of their requests. This section shows all the open requests in descending order.
- **AI Search**: Allows employees to search and find relevant information or services such as knowledge articles and catalog items.
- **Header**: Offers easy navigation to My requests, Profile, and other useful information.
- **Footer**: Contains legal information, links, and copyright details.
- **Feedback widget**: Organizations can easily capture feedback on the Kiosk experience using the experience feedback drawer widget on the home page. For more information, see Integrated experience and service feedback.

  For more information on how to configure, see Configure Employee Center Pro Kiosk.

For more information on how to use the Kiosk application, see Use Employee Center Pro Kiosk.

Configure Employee Center Pro Kiosk

Configure and use the default Kiosk for better deskless experience.

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Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > **Service Portals** > **Portals** > **Employee Center Pro Kiosk**.
2. Edit the portal to suit your needs.
   For more information on the portal form fields and description, see Create a portal.
3. Navigate to **All** > **Service Portal** > **Themes**.
   a. Search and select `Employee Center Pro Kiosk Coral Theme` to use the default theme.

      Note: Use the default theme for better visual and usability experience. However, you can customize the theme to suit your needs.

   b. Click **Update**.
4. Navigate to **All** > **Service Portal** > **Headers & Footers** to check and use the following default header configuration.
   - Header: `eck_header`
   - Header name: `Employee Center Pro Kiosk Header`
5. Navigate to **All** > **Employee Center** > **Employee Center footer** to check and use the following default footer configuration:
   - Footer: `employee-center-footer`
   - Footer name: Employee Center Footer
6. On the theme page, Edit **CSS variables** information to customize other settings such as primary and background colors.
   For more information on the theme fields and description, see Create a portal theme.
7. Verify and use the following default configuration:
   - Theme: `Employee Center Pro Kiosk Coral Theme`
   - Main menu: `EC Pro Kiosk Menu`
   - Homepage: `eck_home`
   - Login page: `eck_login_page`
   - Topic template: `eck_taxonomy_topic`
8. Mark the **Enable AI Search** option to **Active** to use AI search.

   Note: For Employee Center Pro Kiosk, the default option is active.

Enable Favorites

9. Navigate to **All** > **Service Portal** > **Portals**, and mark the **Enable favorites** option to **true** to enable My favorites.

   Note: By default, the favorites are disabled on the header. You can enable the favorites with the following steps:

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a. On the portal page, next to the **Main menu** field, click preview this record, and open the **EC Pro Kiosk Menu** record.

b. Edit the **Additional options, JSON format** field.

```
"enable_requests":{ "displayValue":"true", "value":true
"enable_favorites":{ "displayValue":"true", "value":true
```

The **My Favorites** option appears on the header.

10. Select **Support right-to-left languages** for supporting the right-to-left language display on the UI.
11. Click **Update**.
12. **Optional:** Navigate to **All** > **Service Portal** > **Portals** > **Employee Center Pro Kiosk**, click **Try it** to preview the kiosk.

Result

Your employees can now use the configured Kiosk portal. Kiosk app displays the portal, theme, header, footer, and others based on your configuration.

Schedule in Employee Center Pro Kiosk

The schedule details in Employee Center Pro Kiosk is a one-stop destination to check the shift scheduling details for the deskless workers.

Employee Center Pro Kiosk provides a centralized access to the deskless workers on their everyday activities at work.

Track and manage your shift schedule with a simplified home page optimized for the kiosks.

The **Schedule** tab displays the scheduling calendar. The Calendar header includes:

- Date picker
- Button that brings you back to the present date.
- Keyboard accessibility icon button to provide keyboard-only navigational tooltip.
- Option to navigate back and forth in time depending on the chosen view.

Note:

- The default view of the calendar displays a month-view. You can change it to the day or the week view.
- Only the day view is available in mobile.

The calendar legends include:

- Shift: Work shift type.
  - Regular: Regular allotted shift.
  - Transfer: Transferred shift apart from the regular assignment.
  - Break: Pre-determined breaks during the shift.
- Holiday: Designated holidays allotted to an employee
- Time off: Paid time off allotted to an employee

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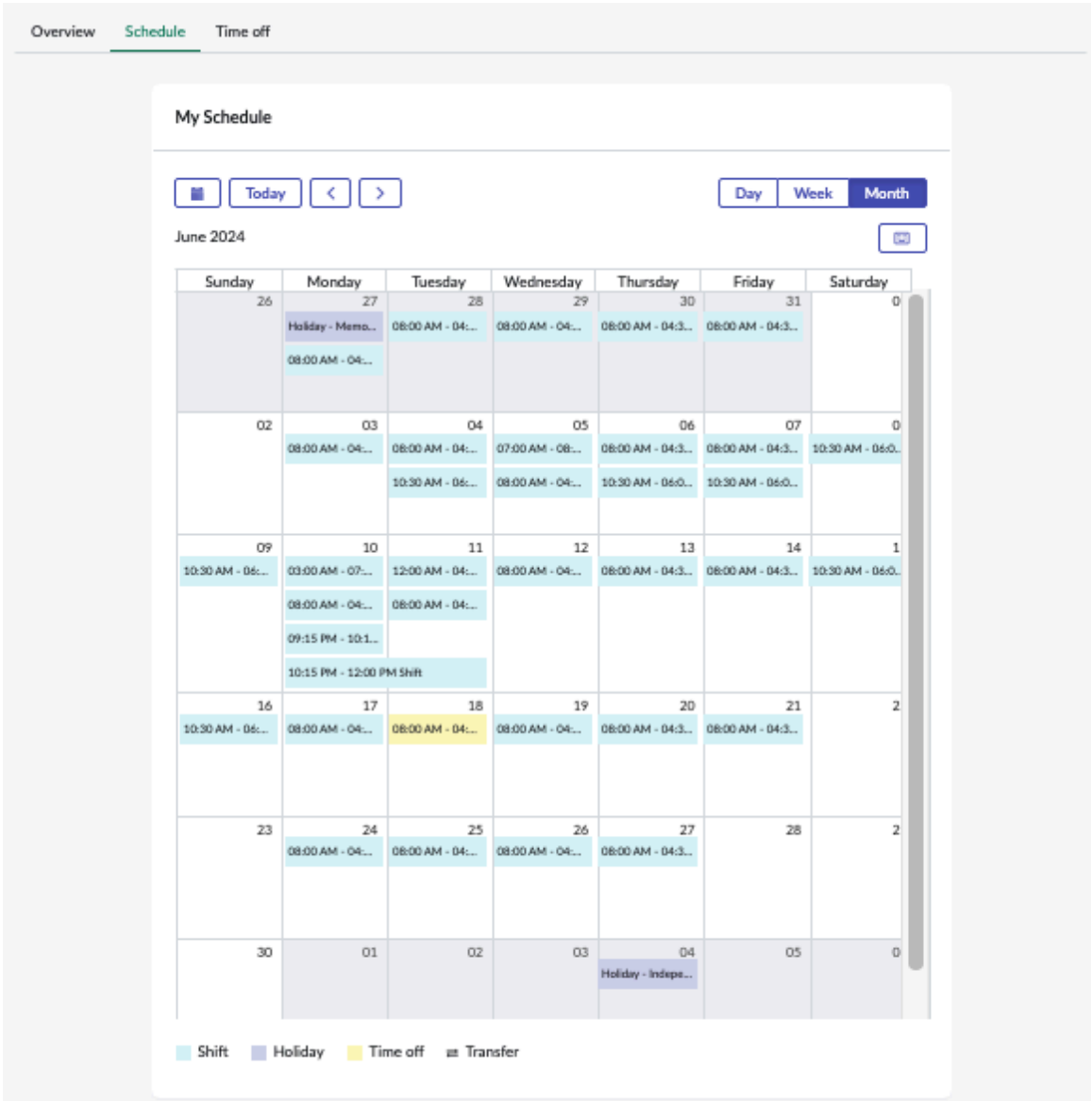
You can select each event type on the calendar to see the details of that event.

Note: Customize the color of the calendar legends by modifying the **Employee Center Pro Kiosk Theme**. For more information, see Customize Employee Center portal theme.

Schedule tab



The display title of the **Schedule** tab is customizable. For more information, see Customize the schedule widget.

Customize data display in Kiosks

Create implementations to customize the display of data in the **Schedule** and **Time off** tabs based on your location or any other criterion according to your organizational requirement.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
   The names of the two API methods for the **Schedule** tab and the **Time off** tab are:

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- `sn_ex_sp_pro_kiosk.RetrieveEXKioskEmpSchedule`
- `sn_ex_sp_pro_kiosk.EXKioskEmployeeTimeOffBalance`

2. From the Extension Points list, select any of the API methods mentioned in step 1.
3. In the `sn_ex_sp_pro_kiosk.RetrieveEXKioskEmpSchedule` method page, select **Create implementation** from the Related Links section.
4. In the Script Include page, add the unique location sys_id in the `this.LOCATIONS` array in **Script**.
   - For more information on location tracking, see Enabling and selecting location tracking options.
   - For more information on script include customizations, see Script includes and customization.

   a. The location sys_id enables a `fixed_match`. The `fixed_match` enables you to show location-based data to your users.

   b. If `fixed_match` isn't available, then the data available is for a `global_match`. The data remains the same regardless of location.

   c. If it's a `no_match`, there isn't a **Schedule** or **Time off** tab visible.

Result
You can view data on the **Schedule** and **Time off** tabs based on your location or any other user criterion you've set.

Customize the schedule widget

Customize the schedule widget on the Employee Profile to display it to your preference.

Before you begin
The kiosk data display for the **Schedule** tab is location-based. You can customize it for different users based on their locations. For more information see, Customize data display in Kiosks.

Role required: esc_admin/sn_ex_sp_pro_kiosk.user

Procedure
1. Navigate to **All** > **Employee Profile** > **Profile Tabs**.
2. Select the **Schedule** from the list of tabs.

   Note: The **Schedule** tab is available in the base system.

3. In the Tab Widget mapping section, select **Schedule** to open the record.
   You can edit the **default_calendar_view** and the **widget_title** within the **Widget Parameters** according to your preference.

Result
The **Schedule** tab is visible on your Employee Profile.

Time off balances in Employee Center Pro Kiosk

The time off balances details in the Employee Center Pro Kiosk is the source of truth for the time off or leave details of the deskless workers.

Track and manage your time off balances with a simplified home page optimized for the kiosks.

The **Time off** tab displays:

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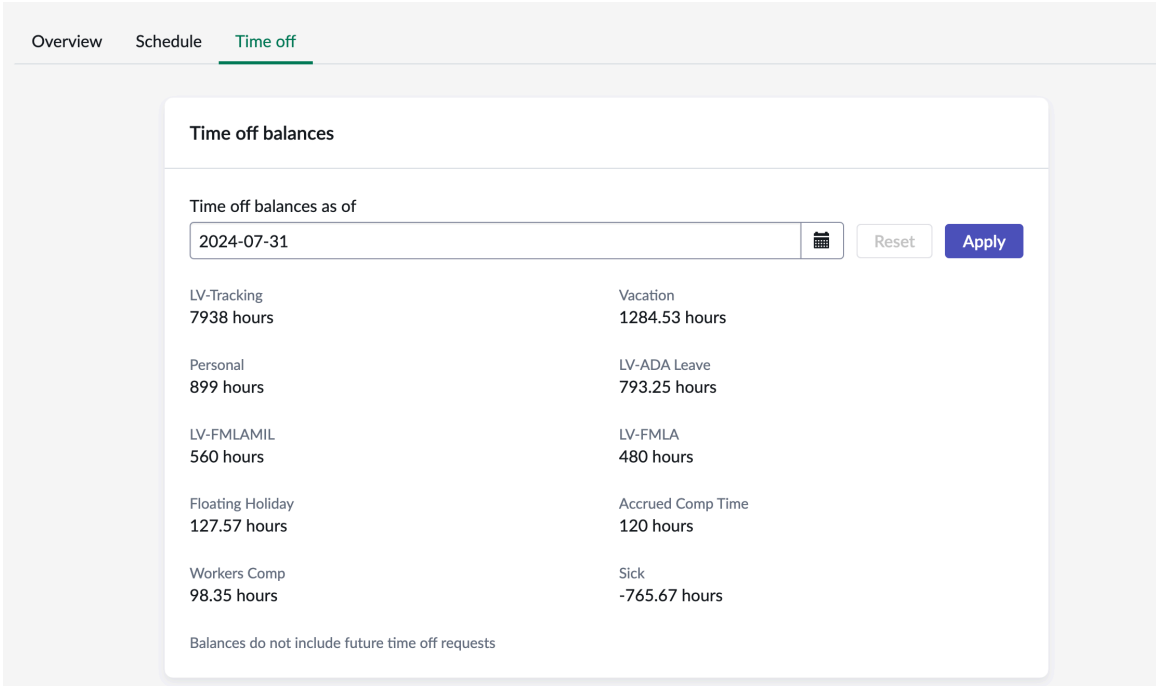
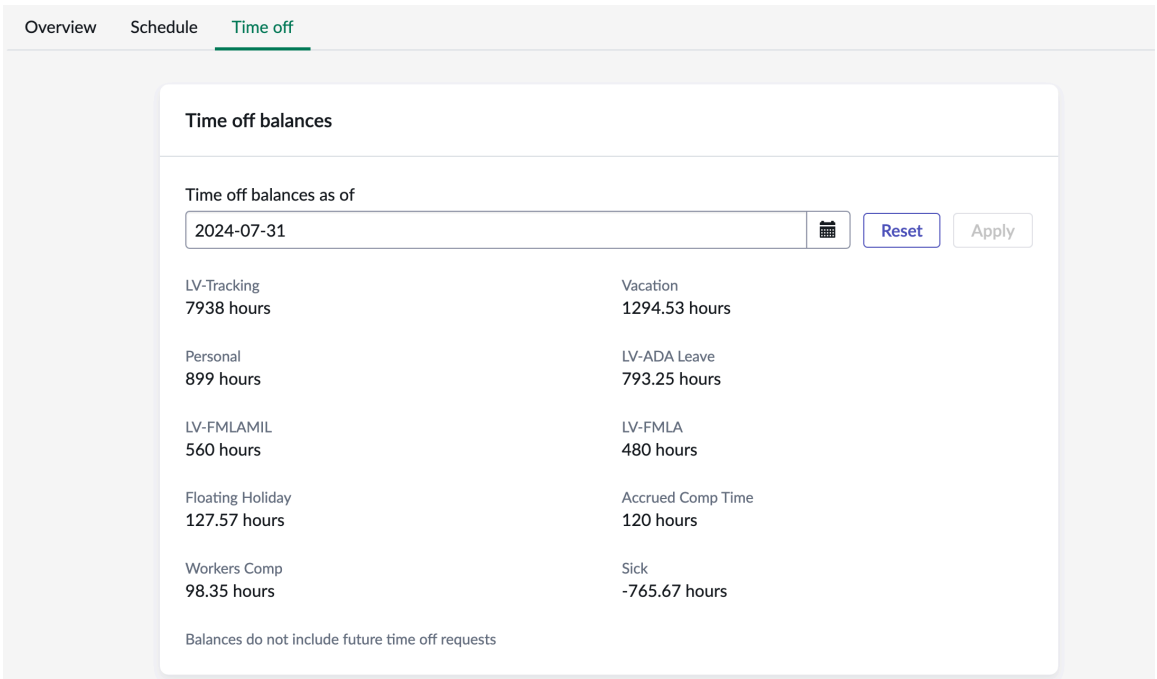
- The current leave balance as of the present date.
- The Date picker to view the leave balance on any other date.
- The **Apply** and **Reset** buttons.

Time off balances - date picker



Time off balances - reset



- Select a date from the date picker and select **Apply** to view your time off balances as on the selected date.
- Select **Reset** to reset the date picker to the present date.

Note: View your time off balances until and up to a year as supported by default.

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The display title of the **Time off** tab is customizable. For more information, see Customize the time off widget.

For more information on customizing the data display in Kiosks, see Customize data display in Kiosks.

Customize the time off widget

Customize the time off widget on the Employee Profile to display it to your preference.

Before you begin

The kiosk data display for the **Time off** tab is location-based. You can customize it for different users based on their locations. For more information see, Customize data display in Kiosks.

Role required: esc_admin/sn_ex_sp_pro_kiosk.user

Procedure

1. Navigate to **All** > **Employee Profile** > **Profile Tabs**.
2. Select the **Time off** from the list of tabs.

   Note: The **Time off** tab is available in the base system.

3. In the Tab Widget mapping section, select **Time off** to open the record.
   You can edit the **widget_title** within the **Widget Parameters**.

Result

The **Time off** tab is visible on your Employee Profile.

Customize Employee Center Pro Kiosk widgets

You can configure the widget instance options to control how data is displayed within the widget.

Modify the Upcoming shift widget display

The upcoming shift widget displays the shift information of the Employee Center Pro Kiosk user. You can configure the instance options based on your display preferences.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to Employee Center Pro Kiosk home page.
   The kiosk home page is displayed.
2. Click the **Upcoming shift** widget.
3. Press and hold the control key on the keyboard, right-click the Upcoming shift widget, and then select **Instance Options**.
4. Configure the instance options.

Shift widget instance options

Instance option	Description
Title	Specify the title of the widget. Default: `Upcoming shift`.

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Instance option	Description
Time frame for upcoming shift information	Number of shifts to show. The choices are 7, 14, and 30 days. Default value: 7 **Note:** Earliest shift details are displayed.

5. Click **Save**.

Note: The latest shift information is available only after relogging.

Related topics

Configure Employee Center Pro Kiosk

Modify the Time off widget display

The widget displays the time off balances. You can configure the instance options based on your display preferences.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to Employee Center Pro kiosk home page.
   The kiosk home page is displayed.
2. Click the **Time off** widget.
3. Press and hold the control key on the keyboard, right-click the time off widget, and then select **Instance Options**.
4. Configure the **Title** instance options.
   Specify the title of the widget. Default: `Time off`.

Note: Leave balance is rounded off.

5. Click **Save**.

Note: The time off information is available only after relogging.

Related topics

Configure Employee Center Pro Kiosk

Modify Send to self widget display

The Send to self widget displays the options for sending useful information as an email or an SMS for the Employee Center Pro Kiosk user. You can configure the instance options based on your display preferences.

Before you begin
Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to Employee Center Pro Kiosk home page.
   The kiosk home page is displayed.

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2. Click the **Send to self** widget.
3. Press and hold the control key on the keyboard, right-click the Upcoming shift widget, and then select **Instance Options**.
4. Configure the instance options.

Instance options

Instance option	Description
Enable Send SMS	Select the SMS option to send information.
Enable Send Email	Select the Email option to send information.

5. Click **Save**.

Related topics

Configure the mail and SMS send to self

Modify the Browse help content widget display

The widget displays the help content for the Employee Center Pro Kiosk user. You can configure the instance options based on your display preferences.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to Employee Center Pro Kiosk home page.
   The kiosk home page is displayed.
2. Click the **Browse help content** widget.
3. Press and hold the control key on the keyboard, right-click the widget, and then select **Instance Options**.
4. Configure the instance options.

Instance options

Instance option	Description
Title	Specify the title of the widget. Default: `Upcoming shift`.
Time frame for upcoming shift information	Number of shifts to show. The choices are 7, 14, and 30 days. Default value: 7 **Note:** Earliest shift details are displayed.

5. Click **Save**.

Note: The latest shift information is available only after relogging.

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Related topics

Configure Employee Center Pro Kiosk

Modify the Support resources widget display

The widget displays the support resources for the Employee Center Pro Kiosk user. You can configure the instance options based on your display preferences.

Before you begin

Role required: sn_hr_sp.esc_admin

Procedure

1. Navigate to the Employee Center Pro Kiosk home page.
   The kiosk home page is displayed.
2. Click the **Support resources** widget.
3. Press and hold the control key on the keyboard, right-click the widget, and then select **Instance Options**.
4. Configure the instance options.

Support resources instance options

Instance option	Description
Search Application	Default search application (Read only).
Search Sources Filter	Comma-separated list of SYS IDs for searched sources filter from the sys_search_filter table.
Title	Title of the widget.
Number of items per page	Number of items you want to appear on the widget. Default value: 12.
Default sort order	Order in which the items are sorted and displayed. The options are: ○ **popularity** ○ **alphabetical** Default value: popularity.
Give employees the option to globally expand their search	Select this option to expand the search.
Content displayed from	Options in which the items are displayed. The options are: ○ **Current topic only** ○ **Current topic and all child topics** Default value: Current topic only.
Show empty state	Opt in to show the widget with empty state. Default: Active. You can uncheck this option

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Instance option	Description
	to hide the support resources widget when there is no connected content.

5. Click **Save**.

Related topics

Configure Employee Center Pro Kiosk

Configure the mail and SMS send to self

Help employees access information easily by sending required information as an SMS or email.

Before you begin

Ensure you set up the email and SMS notifications first.

- Configure email as explained in Create an email notification.
- Configure SMS notification with Twilio as explained in Configure Notify with Twilio.

> **Important:** Work with the notify_admin user for Twilio **Account SID** and **Auth Token** to set up Notify with Twilio. Follow the instructions from Configure Notify with Twilio and verify Verified Caller IDs.

Role required: sn_hr_sp.esc_admin

About this task

You can send useful information such as **Schedule** or **Article** to self as an email or SMS.

Procedure

1. Navigate to **All** > **Employee Center** > **Send to self configuration**.
2. Click **New** or open an existing record.
3. On the form, fill in the fields.

Send to self configuration form

Field	Description
Send to self channels	Channel for sending the information. ○ Email ○ SMS ○ Email and SMS (Default) **Note:** Ensure you specify the **Email** address and **Home phone** number on the **sys_user** table.
Active	Check the box to activate. **Note:** You can have only one active configuration for each portal.
Portal	Portal on which you want to display the **Send to self** option.

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Field	Description
	Note: By default, this option is available for Kiosk. However, you can configure for other portals too.
Twilio number	Number to send SMS. This field is visible only when you select **SMS** or **Email and SMS**.

Note: When the email or phone number is not configured, an error message appears. For example,

- When you enable the sn_hr_core plugin, you can raise a profile update request directly: `Unable to send email as there is no email address available. To add an email address to your profile, submit a profile update request here: Request profile update.`
- When you don't enable the sn_hr_core plugin, you can request your manager for a profile update: `Unable to send email as there is no email address available. To add an email address to your profile, contact your manager.`

4. Click **Save**.

Result
On configuration, Employee Center Pro Kiosk portal displays the **Send to self** option.

What to do next
Employee can send the mail and SMS using the default Email and SMS template.

- *`User triggered notification template`* is available from **All** > **System Notifications** > **Email** > **Templates**.
- *`User triggered employee notification layout`* is available from **All** > **System Policy** > **Email** > **Layout**.

Related topics
Use Employee Center Pro Kiosk

Modify Send to self widget display

Modify email notification layout

Integrate with the UKG spoke

Integrate with the UKG spoke to use the Employee Center Pro Kiosk in your organization.

Before you begin
Activate the following plugins in their required versions or later versions to use the Employee Center Pro kiosk.

- Activate Employee Center Pro plugin version 31.0.4 (sn_ex_sp_pro).
- Activate Employee Profile plugin version 11.0.3 (sn_employee).
- Activate the HR Service Delivery with Ultimate Kronos Group plugin (sn_hr_ukg).

Note: Installation of the HR Service Delivery with Ultimate Kronos Group plugin (com.sn_hr_ukg) provides a default setup of the UKG spoke.

Role required: admin

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About this task
If you don't plan to activate the HR Service Delivery with Ultimate Kronos Group plugin (com.sn_hr_ukg), Set up the UKG spoke manually. The HR UKG integration plugin provides you with a default Kronos integration.

Procedure

Set up the UKG spoke.

- For more information on the setup, see Set up the .
- The schedule and time off data on the Employee Center Pro kiosk is enabled with the existing UKG spoke actions.
  - **Look up Employee Schedule**: To get the shift schedule data.
  - **Get Employee Accruals by Person Number**: To get the time off balance data.

    For more information on creating requests, see Create request as manager using the catalog item .

Receive employee data from UKG to the Employee Center Pro Kiosk

Map the employee IDs between the UKG system and the Employee Center Pro Kiosk to see employee details in your organizational kiosks.

Before you begin
Role required: admin

About this task
Map the **Person Number** from the UKG system to the **Employee number** in the Employee Center Pro Kiosk. The mapping is required for your employees to be able to view their details in their organizational kiosks.

Procedure

1. Navigate to **All** > **Employee Center** > **System Security** > **Users**.
2. Add the **Person Number** details in the **Employee number** field for each employee.

Result
You have mapped the employee data flow from the UKG system to the Employee Center Pro Kiosk.

Use Employee Center Pro Kiosk

Use the Kiosk experience to self-serve, leading to improved productivity, and operational efficiencies for the organization.

As an EC Pro Kiosk user (sn_ex_sp_pro_kiosk.user), you can easily navigate to the content that's organized to serve your work needs.

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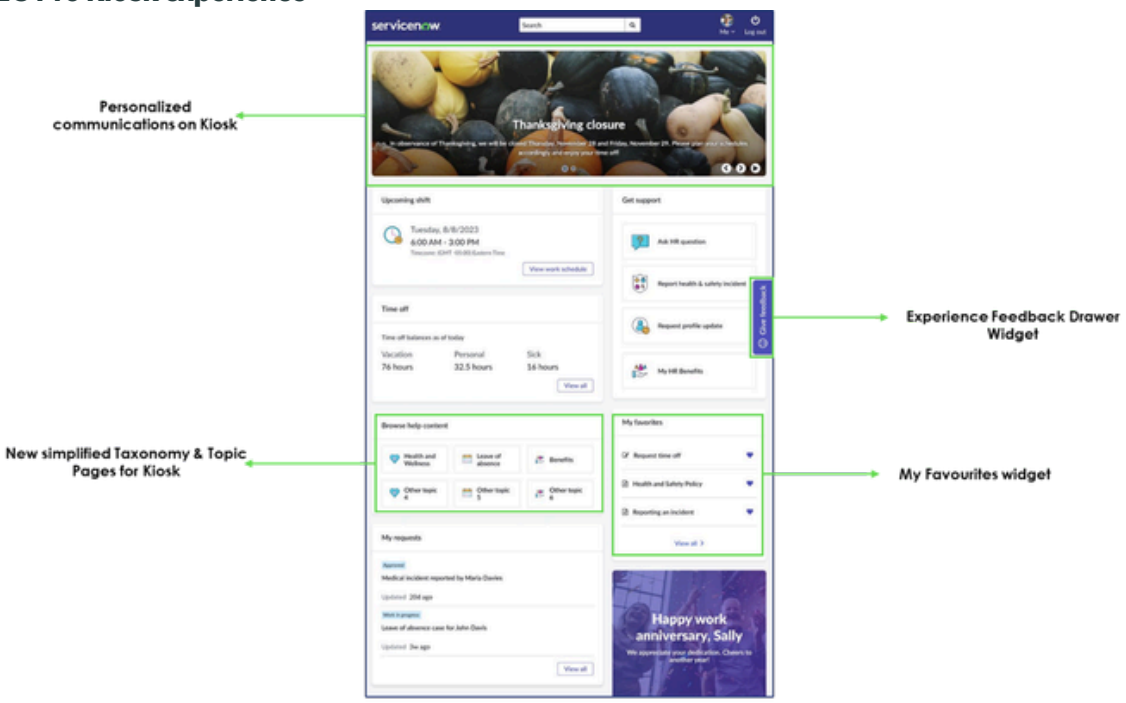
EC Pro Kiosk experience



Employee Center Pro Kiosk Homepage

- Be more productive with simplified authentication and guided help.
- Access information, services, and technology.
- View the shift and time off information.
- Raise requests about health, profile updates, and other services.
- Send the required information to self as an SMS or email.

How Send to self works

You can send useful information such as **Schedule** or **Article** to self as an email or SMS.

Send to self: Mail and SMS templates

1. Options to select from **Send as Email** or **Send as SMS**.
2. Sample mail template for the required article.
3. Sample SMS template for the schedule information.
4. Sample mail template for the schedule information.

For more information, see Employee Center Pro Kiosk and Configure the mail and SMS send to self.

Employee Profile integration with Microsoft Teams

Employee Profile provides integration with Microsoft Teams that show the current statuses of employees on their respective Employee Profile pages itself.

The Microsoft Teams integration with the Employee Profile lets users quickly gauge the availability of their peers during work hours and beyond on their Employee Profile pages itself.

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When you navigate to another user's profile, the Microsoft Teams status view shows a **Connect** option that leads to a chat window in Microsoft Teams where you can start a conversation. You can also view the Teams status for that particular user on their Employee Profile page.

The statuses available for display are **Available**, **Away**, **Busy**, and **Offline**.

If you are not already logged in to Microsoft Teams from your profile page, the screen shows a prompt **Login to Microsoft Teams to view status** to connect with your Microsoft Teams account using a login form.

You can disable the status view if you do not wish to see it on your profile page.

Note:

To use this integrated feature, the user must install either the HR Service Delivery integration with Microsoft Teams version 3.1.0 app or the IT Service Management integration with Microsoft Teams version 2.4.0 app.

Disable Microsoft Teams status view

You can disable the status view of Microsoft Teams on your Employee Profile page.

Before you begin
Role required: sp_admin/sn_hr_sp.esc_admin

About this task
You can choose whether you want to show the integrated status view of Microsoft Teams on your Employee Profile page.

For employees, you can enable or disable the user presence info using the employee profile header configuration. For more information, refer to Configure the Employee Profile header.

For non-employees, follow this procedure:

Procedure

1. Navigate to **All** > **Employee Center** > **Profile**.
2. Right-click and choose **Instance Options** from the list.
3. Select or deselect the **Enable non employee user presence info** and click save on the pop-up screen, depending on your preference whether you want the Microsoft Teams status view on your Employee Profile page.

Result
Customize your employee profile page as per your business requirement, by adding or removing the Microsoft Teams status view.

Employee Center for Microsoft Viva Connections

The Employee Center for Microsoft Viva Connections integration extends the ServiceNow for Microsoft Teams integration, bringing the ServiceNow employee experience into the Microsoft Viva Connections dashboard.

Before installing Employee Center for Microsoft Viva Connections, ensure that the following prerequisites are met:

- Your ServiceNow instances have been upgraded to Vancouver release.
- You've installed and deployed the **IT Service Management for Microsoft 365(sn_now_teams_it)** or **HR Service Delivery for Microsoft 365(sn_now_teams_hr)** plugins.

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- You've installed and deployed Employee Center. For more information, see Configuring Employee Center.
- You've installed and deployed **Employee Center Core (sn_hr_sp)** August 23 store release version.

There are multiple admin roles required to deploy the Employee Center for Microsoft Viva Connections integrations application. The following table depicts the different admin roles required to perform various setup tasks in your environment.

Roles

Activity	Role on ServiceNow	Role on Microsoft Azure portal
Install Employee Center for Microsoft Viva Connections application	External app install admin	NA
Authorize Employee Center for Microsoft Viva Connections	External app install admin	Any of the following roles: • Application Administrator • Cloud Application Administrator • Global Administrator • Privileged Role Administrator
Update the Microsoft Teams application ID	External app install admin	Microsoft Teams administrator
Download the Microsoft Viva solution package	External app install admin	NA
Deploy the Microsoft Viva integrations package in Microsoft SharePoint	NA	Microsoft SharePoint administrator
Enable the display of the Microsoft Viva card in Microsoft SharePoint	NA	Microsoft SharePoint administrator

Get started

Integrate	Configure
Integrate your Viva experience with Microsoft Teams and Employee Center.	Plan and configure your implementation.

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Manage	Reference
Manage app access to deploy the Viva connections card.	Reference content for Viva connections.

Integrating Employee Center for Microsoft Viva Connections

Integrate Employee Center with Microsoft Viva Connections to enable an employee experience that allows users to manage tasks and navigate to Employee Center from Microsoft Teams.

Install Employee Center for Microsoft Viva Connections application

Install the Employee Center for Microsoft Viva Connections application to enable users to easily access their task cards from Microsoft Teams.

Before you begin

Role required: external_app_install_admin

Procedure

1. Navigate to **System Application** > **All Available Applications** > **All**.
2. In the search field, enter `Employee Center for Microsoft Viva Connections`.

   You can search for the application by its name or ID.
3. Select **Install**.

Result

A confirmation message appears on successful installation.

Configuring Employee Center for Microsoft Viva Connections

Configure your ServiceNow instance and Microsoft Teams application to enable the ServiceNow card in the Microsoft Viva dashboard.

Authorize Employee Center for Microsoft Viva Connections

Authorize the Employee Center for Microsoft Viva Connections application to enable the display of the ServiceNow card in the Microsoft Viva dashboard.

Before you begin

Role required:

- ServiceNow instance: external_app_install_admin
- Microsoft Azure portal: Administrator role

The administrator role in Microsoft Azure can be as follows:

- Application Administrator
- Cloud Application Administrator
- Global Administrator
- Privileged Role Administrator

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Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.
2. Select the **Authorize** button in the **Employee Center for Viva Connections** entry.
3. Select **Accept** to provide admin consent.

Result

On successful authorization, the app is installed in the instance.

Update the Microsoft Teams application ID

Update the Microsoft Teams application ID in your ServiceNow instance to navigate to your custom ServiceNow for Microsoft Teams app.

Before you begin

Ensure you have created and uploaded the ServiceNow for Microsoft Teams manifest file. For more information, see Create and download manifest file for Employee Center and Microsoft 365 integration.

Role required:

- Microsoft: Microsoft Teams administrator
- ServiceNow instance: external_app_install_admin

Procedure

1. Copy the App ID.
   a. Log in to the Microsoft Teams admin center.
   b. Navigate to **Teams apps** > **Manage apps**.
   c. Select the ServiceNow for Microsoft 365 app.
   d. Copy the App ID.
2. Update the App ID.
   a. Log in to your ServiceNow instance.
   b. In the filter navigator, enter `sys_properties.list`.
   c. In the **Name** field, search for `sn_now_ms_viva.service_now_for_teams_app_id`.
   d. Select the property to view the property details.
   e. Update the **App ID** in the **Value** field.
   f. Select **Update**.

Allow cross-domain requests to REST APIs

Allow cross-domain requests to REST APIs from a browser-based application in a different domain by creating a record in CORS rules through the Microsoft Viva Connections Integration application scope.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Web Services** > **REST** > **CORS Rules**.
2. Select **New**.

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3. On the form, fill in the fields.

CORS rule form

Field	Description
Name	Name for the CORS rule.
Application	Application containing the associated CORS record. This field is automatically set to Employee Center for Microsoft Viva Connections.
REST API	The REST API this CORS rule applies to. Enter `Microsoft VIVA Integration [sn_now_ms_viva/viva]`.
Domain	The domain that this CORS rule applies to. Enter `https://{tenantName}.sharepoint.com`. For example, https://nowhkconnect.sharepoint.com. This CORS rule is evaluated against requests from the specified domain. You can specify a domain pattern or an IP address.
Max age	The number of seconds to cache the client session. After an initial CORS request, further requests from the same client within the specified time do not require a preflight message. If you do not specify a value, the default value of 0 indicates that all requests require a preflight message.
HTTP Methods tab	The HTTP methods allowed. Only the selected methods can be called from the specified domain. The available methods are: ○ **GET** ○ **POST** ○ **PUT** ○ **PATCH** ○ **DELETE**
HTTP Headers tab	
Exposed headers	List of headers that the browser is allowed to access from the request.

4. Select **Submit**.

Managing Employee Center for Microsoft Viva Connections

Download and deploy the Microsoft Viva solution package.

Download the Microsoft Viva solution package

As a ServiceNow admin with the external_app_install_admin role, download the Microsoft Viva solution package to your ServiceNow instance. Your Microsoft SharePoint administrator will then deploy the package to enable the Microsoft Viva card on the Microsoft SharePoint home site.

Before you begin
Role required: external_app_install_admin

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Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Microsoft Viva Connections** > **Viva Package**.
2. Select **Download package**.
3. Unzip the Microsoft Viva package.

What to do next

Ensure that the Microsoft Viva integrations package is deployed in Microsoft SharePoint, either by you if you have Microsoft SharePoint administrator privileges or by your site's Microsoft SharePoint administrator. For more information, see Deploy the Microsoft Viva integrations package in Microsoft SharePoint.

Deploy the Microsoft Viva integrations package in Microsoft SharePoint

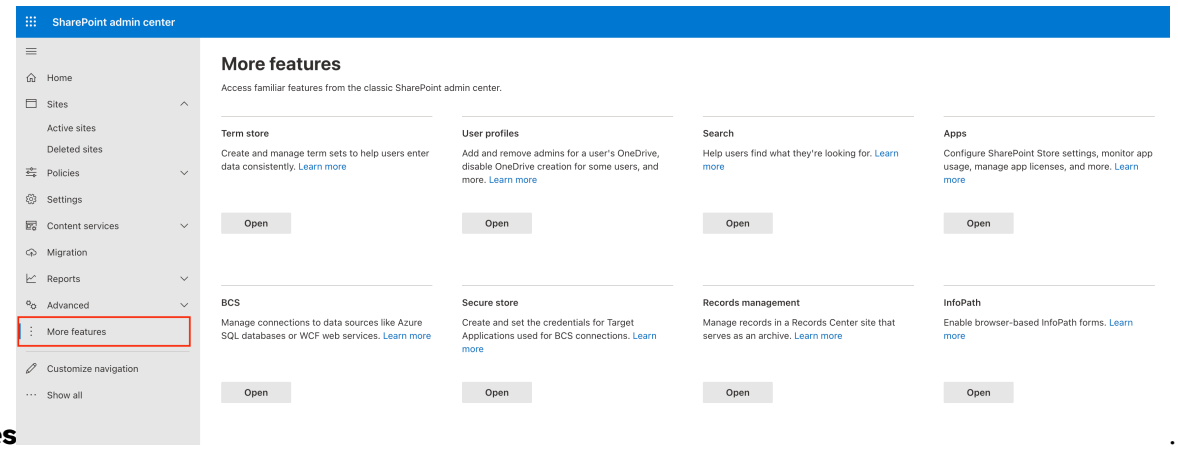
Deploy the Microsoft Viva integrations package in the Microsoft SharePoint admin center to enable the display of card details in the Microsoft Viva dashboard.

Before you begin

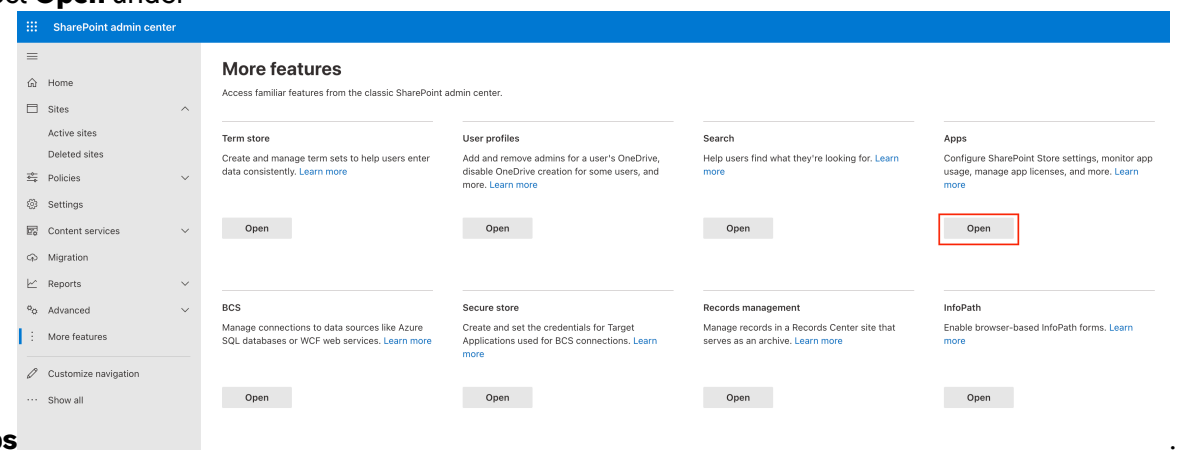
Role required: SharePoint administrator

Procedure

1. Log in to Microsoft SharePoint admin center.
2. Navigate to **More features**.



3. Select **Open** under **Apps**.



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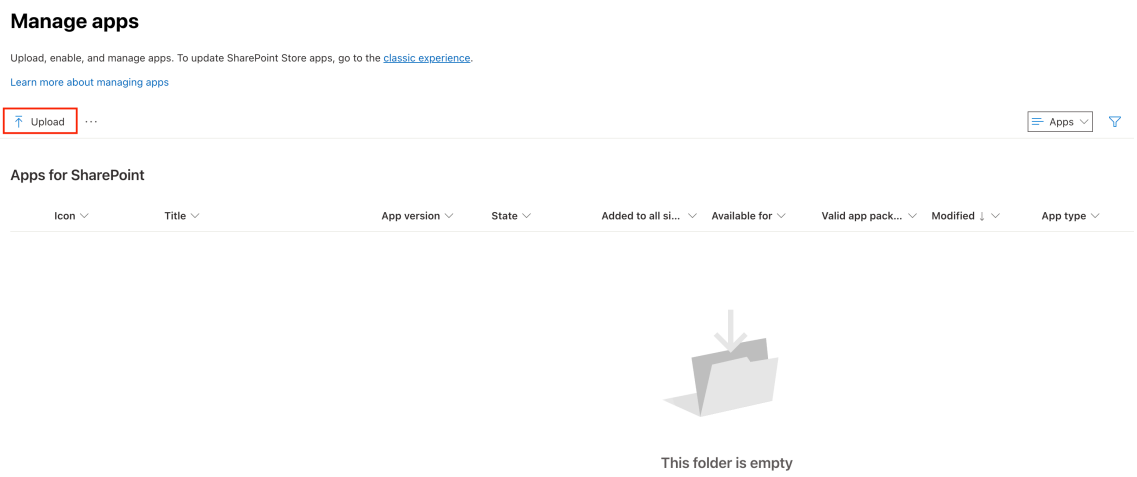
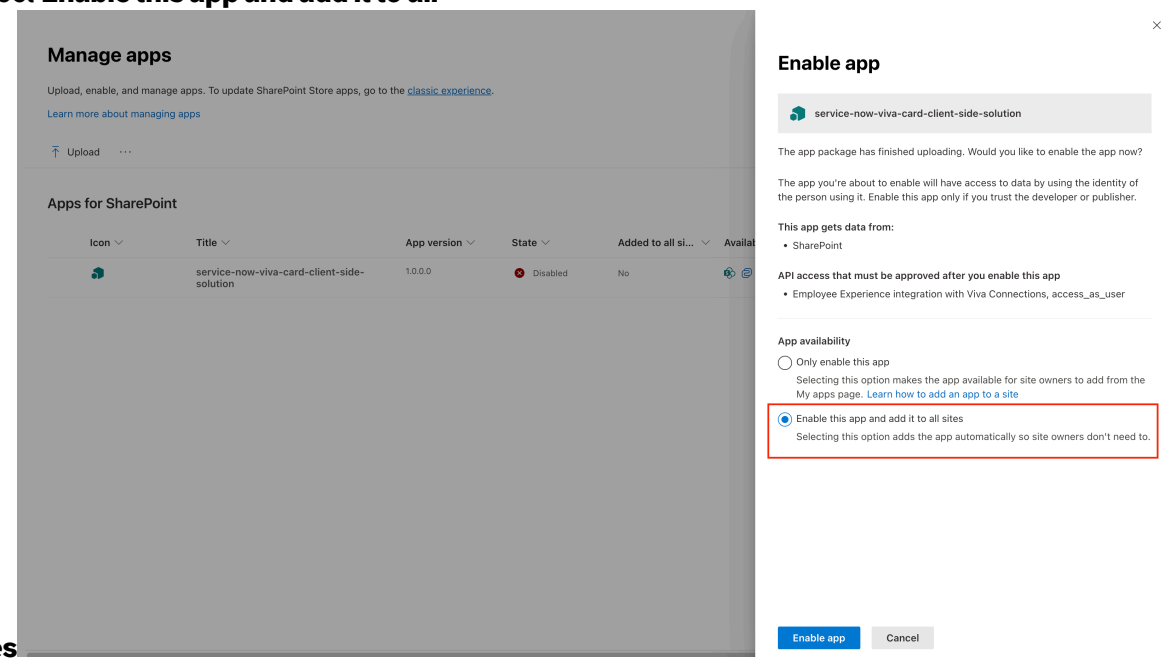
4. Select



Upload

5. Select the Microsoft Viva solution package.
6. Select **Enable this app and add it to all**



sites

7. Select **Enable app**.

Enable the display of the Microsoft Viva card in Microsoft SharePoint

Enable the display of the Microsoft Viva card details to be displayed to users in Microsoft SharePoint.

Before you begin

Role required: SharePoint administrator

About this task

The Microsoft Viva card provides users with a quick view of all tasks assigned to them in both Microsoft SharePoint and Microsoft Teams. It also enables users to quickly navigate to Employee Center to view detailed tasks there.

First grant app access in Microsoft SharePoint and then publish the card.

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Procedure

1. Log in to Microsoft SharePoint admin center.
2. Grant app access to the Microsoft Viva integrations app access in Microsoft SharePoint.
   a. Navigate to **Advanced** > **API access**.
   b. Navigate to **Pending requests** > **Organization-wide**.
   c. Select **Employee Experience integration with Viva**.
   d. Select **Approve**.
3. Publish the card.
   a. Select **Edit**.
   b. Select **Add a card**.
   c. Select the **ServiceNow Viva Integrations** card.
   d. Hover over the card and select the Edit icon ( ).
   e. On the form, fill in the fields.
   For more information, see Microsoft Viva integrations card properties.
   f. Select **Republish**.

   The card is now available for use.

Employee Center for Microsoft Viva Connections reference

Reference topics provide additional information about components and forms required for Employee Center for Microsoft Viva Connections integrations.

Microsoft Viva integrations card properties

Add properties of the Microsoft Viva integrations card to view tasks from Microsoft Teams.

Viva card properties

Field	Description
Card size	Size of the card.
Card Title	Title of the card.
Card Icon	Icon for the card.
Description Field	Description of the card.
Employee Center Label	Option to customize the Employee Center label.
View Tasks Label	Option to customize the View Tasks label.
Primary Text Label	Option to customize the primary tasks label.
Get Help Label	Option to customize the get help label.
Employee Service Center Error Label	Option to customize the Employee Service Center error label.

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Viva card properties (continued)

Field	Description
Tasks List Label	Option to customize the tasks list label.

Employee Center for Zoom

Integrate Employee Center with a Zoom account for your organization employees so they can use Employee Center capabilities from within the Zoom client application.

Before you begin

Ensure you have installed the Employee Center integration with Zoom plugin [sn_ex_ec_zm].

At least Zoom application version 5.13.11 and it must be installed on the ServiceNow® instance.

Role required: admin, Zoom admin

The Zoom admin role is the Zoom account admin role, and it is not a role in ServiceNow.

About this task

Integrating Zoom with#Employee Center enables access#to Employee Center functionality from within the Zoom client either on Windows OS or iOS. For more information, see Use Employee Center from Zoom.

For information about ServiceNow integrations with the Zoom application, see ServiceNow for Zoom.

Procedure

1. Navigate to Zoom App Marketplace and sign in to your account as Zoom admin.
2. Connect your Zoom account to ServiceNow Employee Center on your ServiceNow instance.
   a. Log in to your ServiceNow instance.
   b. Navigate to **All** > **Employee Center** > **Employee Center for Zoom** > **Setup**.

      Note: Different domains can have different Zoom accounts mapped.

   c. On the Connect to an account page, select **Connect** associated with Zoom.

      You are redirected to the Zoom App Marketplace.

      Note: If you are prompted to log in, log in to your Zoom account as an admin.

   d. Enable **Approve for all users**.
   e. Select **Enable** in the Enable App Approval for All Users dialog box.

      ServiceNow Employee Center access and usage in Zoom application is enabled for all employees in your organization.

   f. Select **Allow**.

      The message `Successfully connected to Zoom account` is displayed in your ServiceNow instance setup.

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3. Access ServiceNow Employee Center in the Zoom application by an admin.

   a. Open your Zoom application.

      The notification `ServiceNow Employee Center is added` is displayed.

   b. Navigate to **Apps** > **My Apps**.

      You can now access the ServiceNow Employee Center application.

   c. Select **ServiceNow Employee Center**.

   d. Enter your ServiceNow login credentials and select **Log in**.

      ServiceNow Employee Center homepage is displayed.

Related topics

Use Employee Center from Zoom

Set up a custom portal

Configure the ServiceNow® Employee Center portal appearance of your organization's custom portal in Zoom.

Before you begin
Role required: admin

Procedure

1. Log in to your ServiceNow instance.
2. In the navigation filter, enter `sys_properties.list`.
3. Create the custom portal.

   a. Select the **Show column search row** icon, enter `sn_ex_ec_zm.portal.suffix` in the **Name** search field, and press **Enter**.

   b. Select **sn_ex_ec_zm.portal.suffix**.

   c. On the System Property form, enter your custom portal suffix in the **Value** field.

   d. Select **Update**.

   Note:

   Because the system property is domain separated, different domain admins can create different custom portals.

4. Create a custom header for the embedded portal.

   a. In the Navigator pane, type `sys_response_header.list`.

   b. Select **New**.

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c. On the form, fill in the fields.

HTTP Response Header form

Field	Description
Active	Option to make the HTTP response header configuration active.
Application	Application scope for the custom portal record.
Applies to	Select **Specify Type**.
Type	Type of record the HTTP response header configuration applies to , in this case, Service Portal (Service Portal [sp_portal]) records.
Record	The record for your custom portal.
Name	Name for the name-value pair for the HTTP response header for example, Content-Security-Policy. `Content-Security-Policy`
Value	Value you want to assign to the name-value pair for the HTTP response header. `frame-ancestors 'self' https://zoom.us`
Description	Description for the HTTP response header.

d. Select **Submit**.

For more information about adding a header, see Configure HTTP response headers.

View connected Zoom accounts

View the list of Zoom accounts connected to your ServiceNow® instance.

Before you begin

Role required: admin

Procedure

1. Log in to your ServiceNow instance.
2. Navigate to **All** > **Employee Center** > **Employee Center for Zoom** > **Connected Zoom accounts**. On the Installed Accounts form, the Zoom accounts connected to the ServiceNow instance are listed.
3. Select any Account ID value to see the associated Zoom account details.

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Connect your Zoom account to a different ServiceNow instance

Connect your Zoom account to another ServiceNow® instance by overriding your existing ServiceNow instance.

Before you begin
Role required: admin

Procedure

1. Open the ServiceNow instance that you want to connect to your existing Zoom account.
2. Navigate to **All** > **Employee Center** > **Employee Center for Zoom** > **Setup**.
3. On the Connect to an account form, select **Connect** associated with Zoom.
4. Enter CHANGE in the **Type CHANGE to continue** field and select **Override connection**.

Result
Your Zoom account is successfully connected to another ServiceNow instance.

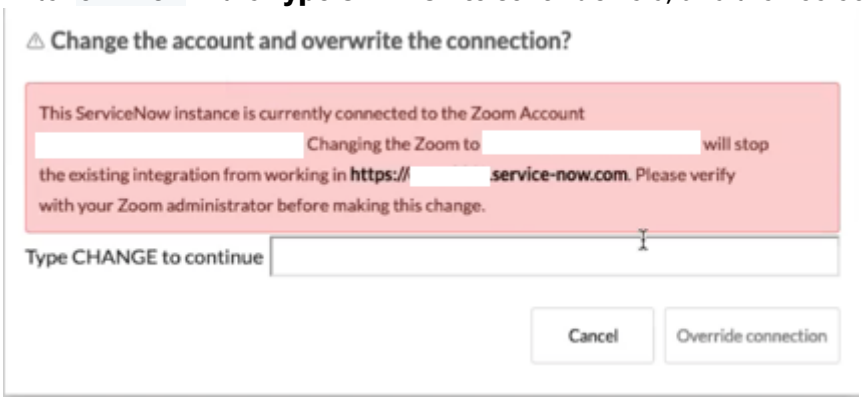
Change existing Zoom account connection

Change your existing Zoom account connection in your ServiceNow® instance.

Before you begin
Role required: admin, Zoom admin

Procedure

1. Navigate to Zoom App Marketplace and sign into your other Zoom account which you want to connect to your existing ServiceNow instance.
2. Log in to your ServiceNow instance.
3. Navigate to **All** > **Employee Center** > **Employee Center for Zoom** > **Setup**.
4. On the Connect to an account form, select **Change account**.
5. On the Confirm Change Account pop-up page, select **OK**.
6. Enter CHANGE in the **Type CHANGE to continue** field, and then select **Override connection**.



Note: You can have different domains, which have different Zoom accounts mapped.

Result
Your existing ServiceNow instance is successfully connected to another Zoom account.

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Moveworks for Employee Center

Moveworks for Employee Center enables AI-powered conversational support within the Employee Center portal through natural language interactions.

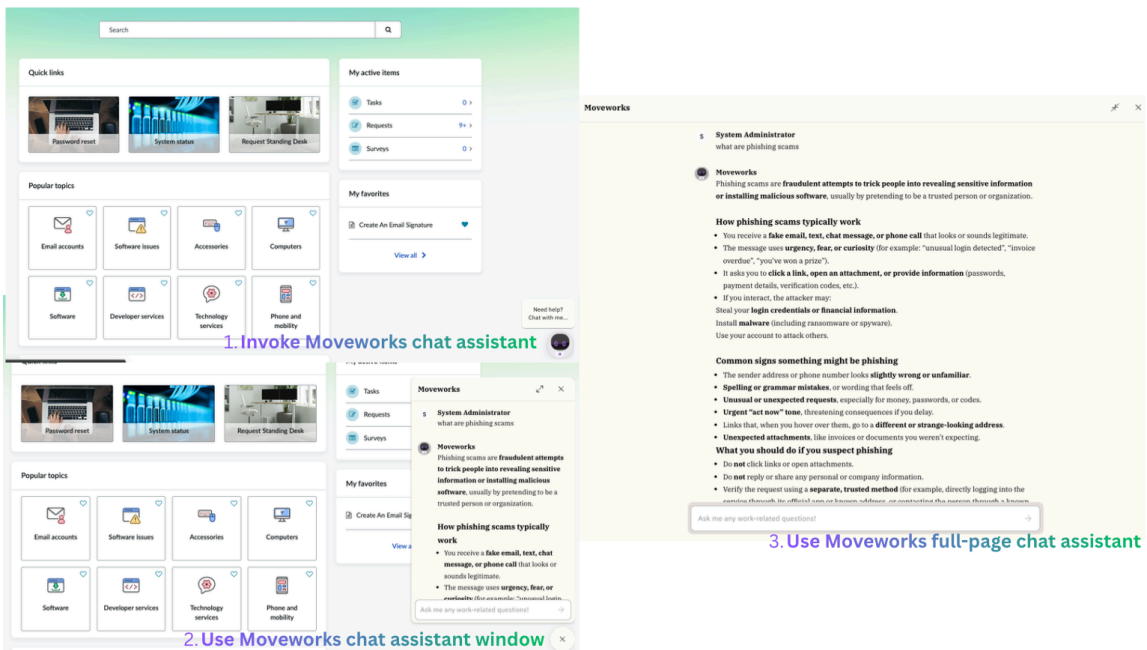
Using Moveworks embedded AI assistant, your employees can ask questions, get instant answers, and complete tasks end-to-end from Employee Center and Employee Center Pro.

Employees can access Moveworks embedded AI conversational assistant from ServiceNow Employee Center and Employee Center Pro and get help. Benefit from the AI that knows your people and process, understands your business, and gets work done.

- **Embedded AI Assistant**: Meet employees where they're and how they want to receive information and request services.
- **Conversational self-service experiences**: Let employees ask questions in their own words about IT, HR, and other domains, and get instant resolutions from your ServiceNow knowledge base, service catalogs, and more.
- **Actionable workflows, not just answers**: Go beyond FAQs by helping employees check ticket statuses, update requests, and perform common actions in ServiceNow (and beyond) through a single conversational interface.
- **Enterprise search across systems**: When paired with Moveworks Enterprise Search, surface results from ServiceNow and other connected systems through one unified experience.
- **Proven and scalable deployment model**: Built on the trusted Moveworks Embedded Assistant pattern that makes service portals AI-powered.

After you configure the app, you can access the Moveworks Embedded AI Assistant from Employee Center portals with easier access to relevant knowledge, services, and actions.

Moveworks for Employee Center: Embedded AI assistant



Moveworks unifies the enterprise systems under one intelligent layer to deliver outcomes that matter for every role, team, and business objective. For more information, see Moveworks documentation.

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Related topics

- Getting started with Moveworks for Employee Center
- Install Moveworks for Employee Center app from store
- Upload Java KeyStore certificate
- Configure bot ID and AI assistant
- Use Moveworks on employee portal

Getting started with Moveworks for Employee Center

Moveworks integration adds an AI assistant to Employee Center replacing the standard Virtual Agent with Moveworks conversational AI.

A new plugin, Moveworks for Employee Center (sn_ex_mw_chat_int) assistant, lets your entire workforce ask questions, get instant answers, and complete tasks end-to-end.

Using the Moveworks chat assistant, you can access knowledge articles, requests, and tasks. Ensure that you activate the EC applications before installing the Moveworks app from ServiceNow Store.

- Employee Center (sn_ex_sp)
- Employee Center Pro (sn_ex_sp_pro)

Moveworks for Employee Center integration



You can complete the integration process in three steps:

- Install the plugin from store (`sn_ex_mw_chat_int`).
- Upload the Java KeyStore (JKS) certificate and create JWT provider.
- Configure the bot ID and Embedded AI Assistant.

Understand Moveworks basics

Familiarity with the following Moveworks concepts helps with successful configuration:

- User identity management: How Moveworks identifies and authenticates users.
- Content ingestion: Process for indexing knowledge articles.
- Group actions: Configuring bulk operations for common tasks.
- Hand-off configuration: Setting up live agent escalation.
- Multilingual support: Enabling conversations in multiple languages.

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For more information, see Moveworks documentation and Moveworks academy.

Useful tips and information

Before getting started, see the reference information available at Moveworks for Employee Center reference, for settings, observations, and troubleshooting.

Note: Moveworks for Employee Center is available on both Employee Center and Employee Center Pro.

Related topics

- Getting started with Moveworks for Employee Center
- Install Moveworks for Employee Center app from store
- Upload Java KeyStore certificate
- Configure bot ID and AI assistant
- Use Moveworks on employee portal
- Moveworks for Employee Center reference

Install Moveworks for Employee Center app from store

Install and activate the Moveworks for Employee Center plugin to enable AI-powered conversational experience in Employee Center and Employee Center Pro.

Before you begin

Ensure you have the appropriate entitlements for the application.
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **Applications**.
2. Find the **Moveworks for Employee Center** application using the filters and search bar.
3. **Optional:** Check for dependencies, if any, in the Review Installation Details dialog box.
4. Click **Install** to complete the installation process.

Result

The Moveworks for Employee Center application is now installed.

What to do next

Perform the following actions:

- Follow the instructions available at Contact Moveworks and request for JKS certificate file.
- Check your inbox for an encrypted mail from Moveworks and upload JKS certificate.

Upload Java KeyStore certificate

Upload a Java KeyStore certificate and specify the password that's sent in Moveworks encrypted email.

Before you begin

Ensure you have the encrypted email from Moveworks to set up secure connection.

Note: Follow the instructions available at Contact Moveworks support to receive encrypted email.

Role required: admin or OAuth admin

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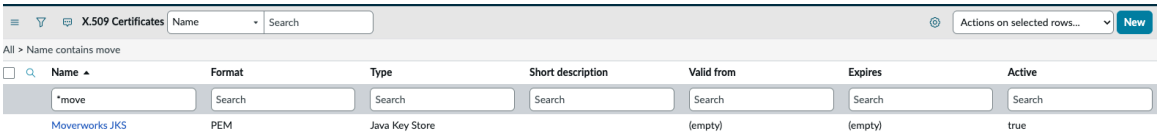
About this task

Certificate authentication creates encrypted communication between your ServiceNow instance and the Moveworks platform. You must upload the JKS certificate file and configure the keystore password in both the certificate record and JWT key provider.

Procedure

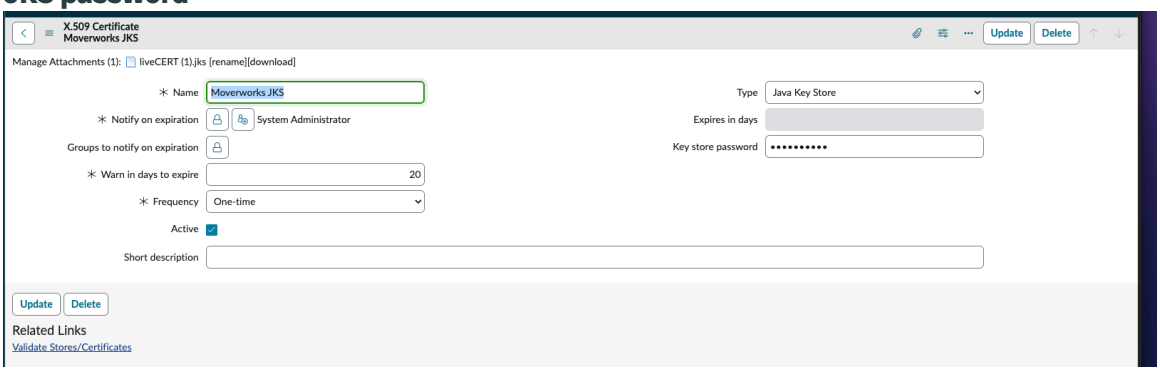
1. Navigate to **All** > **System Definition** > **Certificates**.
2. Search for *moveworks.jks* in the certificate list.

Moveworks JKS certificate



3. Open the certificate record and upload the certificate file.
   a. Select the **Attachment** option.
   b. Upload your *moveworks.jks* file.
4. Enter the password in the **Key Store Password** field.

JKS password



Note: This password you receive from *Moveworks* team.

5. Select **Validate Stores and Certificates**.
   The system validates the certificate with no errors and displays `Valid key_store` message.

Note: Contact Moveworks support for troubleshooting.

6. Navigate to **System Definition** > **JWT Providers**.
   a. Find the `Moveworks JWT Provider` entry in the list and open it.
   b. Enter the same **Key Store Password** in the **Signing Key** field.
7. Select **Save** or **Update**.

Result

Certificate authentication is configured. JWT tokens can now be generated for secure communication between ServiceNow and Moveworks services.

What to do next

Proceed to add bot ID to complete the Moveworks AI assistant setup.

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Related topics

Moveworks for Employee Center reference

Configure bot ID and AI assistant

Specify the bot ID to configure Moveworks AI assistant on Employee Center portal.

Before you begin

Ensure you have the appropriate entitlements for the application.
Role required: admin

About this task

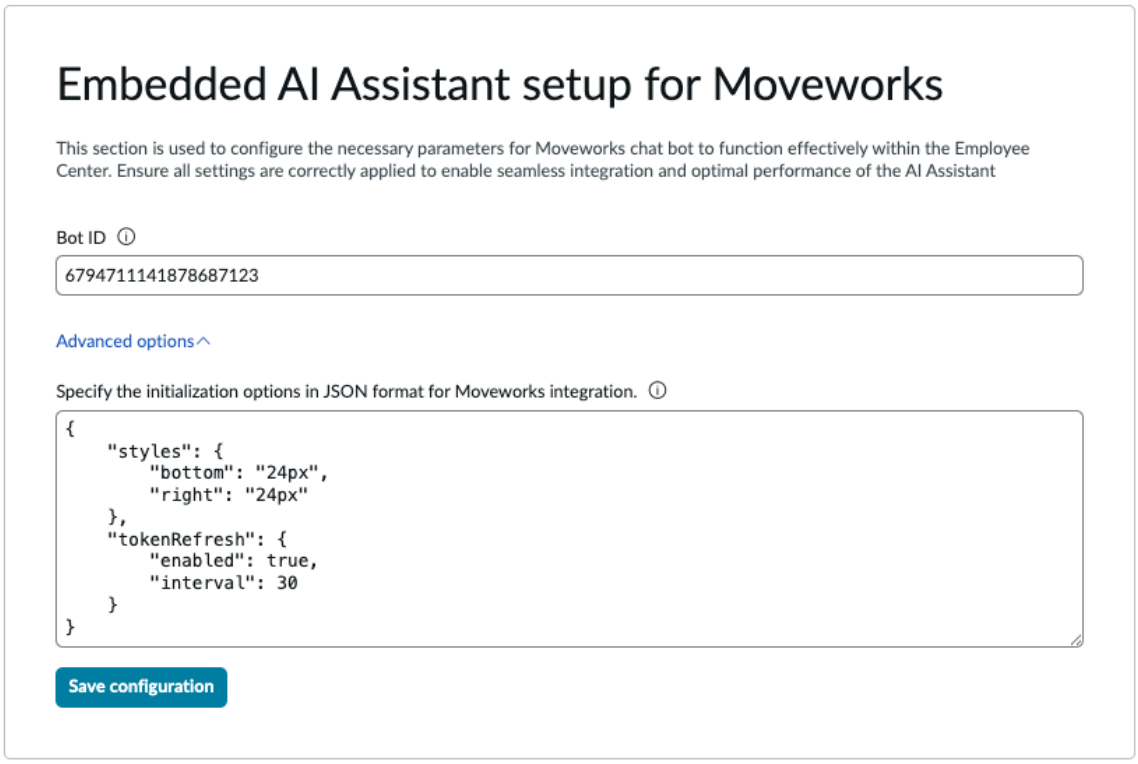
Ensure you copy the bot ID from **Moveworks** > **Chat Platform** > **Manage Chatbots**. For more information, see Embedded AI Assistant Installation-ServiceNow.

Note: You don't need to perform other steps or provide any REST API details.

Procedure

1. Navigate to **All** > **Employee Center** > **Moveworks Assistant Setup**.
2. Add **Bot ID** which can be found from the **Manage Chatbots** record from Moveworks.
   For detailed Bot ID instructions, see Embedded AI Assistant Installation-ServiceNow.
3. Specify the initialization options in JSON format for Moveworks integration.

Example: Embedded AI Assistant setup for Moveworks



4. Click **Save configuration**.

Result

The Moveworks application is ready for use. You can access the features and functionality per your role permissions.

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What to do next

You can perform the following actions:

- Verify the Moveworks chatbot visibility from **All** > **Self-Service** > **Employee Center** portal. For more information, see Use Moveworks on employee portal.
- Test basic functionality by invoking the assistant and asking a sample question.
- Check system properties and verify that all Moveworks-specific properties are configured properly.

Related topics

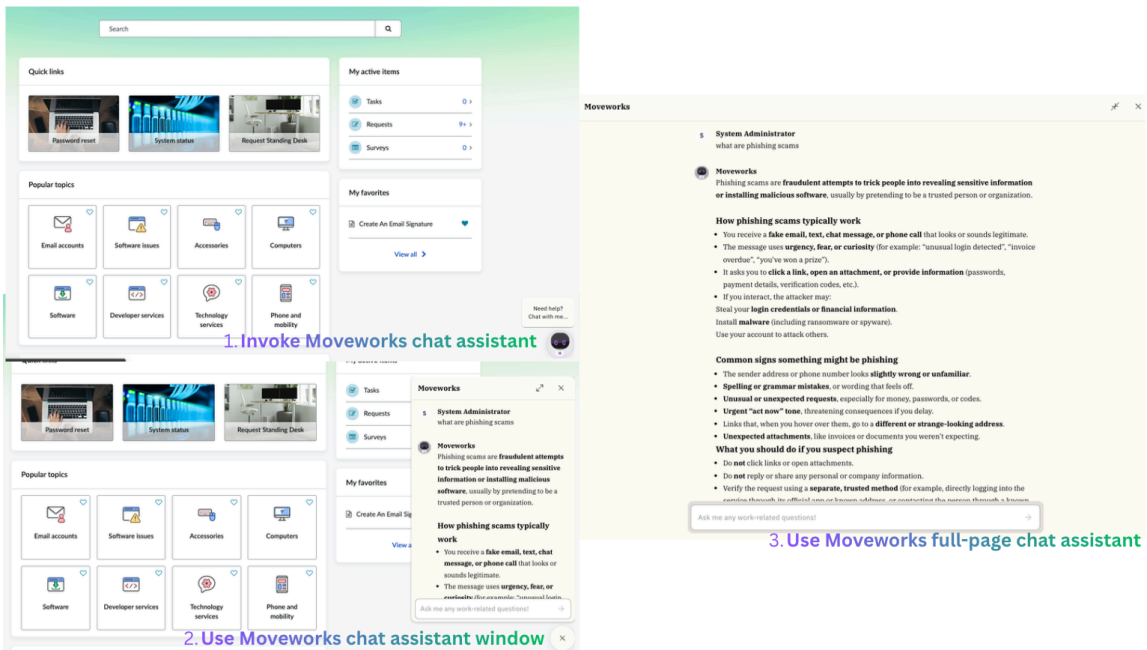
Moveworks for Employee Center reference

Use Moveworks on employee portal

Using the Moveworks AI assistant experience, your employees can access knowledge base, requests, and tasks leading to improved productivity and operational efficiencies.

As an employee, you can use the AI-powered chat assistant to self-serve your work needs. You can go to **All** > **Self-Service** > **Employee Center** to use the Moveworks AI assistant.

Moveworks for Employee Center: Embedded AI assistant



- Benefit from the AI that knows your people, understands your business, and gets work done.
- Be more productive with AI-assisted conversational experience.
- Access information, services, and technology.
- Submit requests, check statuses, and update tickets.
- Enable easier access to relevant knowledge, services, and actions.

You can chat with the Moveworks assistant in a chat window and expand to full-page mode for complex conversations.

Related topics

Getting started with Moveworks for Employee Center

Install Moveworks for Employee Center app from store

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Upload Java KeyStore certificate

Configure bot ID and AI assistant

Moveworks for Employee Center reference

Moveworks for Employee Center reference

The reference topics for the application provide additional information about the Moveworks for Employee Center settings, observations, and troubleshooting.

Certificate validation fails

When certificate validation returns errors during the setup process, verify the following configuration:

- The correct key store password is entered (case-sensitive).
- JKS file isn't corrupted, if necessary, request a fresh file, see Upload Java KeyStore certificate.
- Password is entered in both certificate record and JWT provider settings.
- Contact support if issues persist after verification.

Moveworks chat isn't visible

When the Moveworks chat assistant isn't visible on Employee Center or appears non-functional, you can check the following.

- Confirm that the Moveworks plugin is installed and enabled from the ServiceNow Store.
- Navigate to **System Applications** > **Applications** and confirm the status column displays **Active** for the plugin.
- Verify that the JKS is valid and JWT keys are configured with the correct password.
- Check that the Moveworks website setup page is saved with a valid bot ID as explained in Configure bot ID and AI assistant.
- When all the settings look correct, validate their portal-side configuration and ingestion status.

Enable or disable virtual agent on employee center

The Moveworks for Employee Center chat replaces the classic virtual agent. However, you can initiate and maintain an agent chat of your choice in the following way.

1. Navigate to **All** > **Service Portal** > **Agent Chat**
2. Update the **ESC Chat** value to **True** on the Service Portal Agent Chat Configurations `sp_agent_chat_config` table.

Chat responses aren't relevant

Verify the following configuration:

- Ensure content ingestion is complete in Moveworks platform.
- Verify knowledge articles are published.
- Verify knowledge articles aren't restricted by ACLs.
- Check that requested services are available in your service catalog.

Note: Moveworks for Employee Center is available on both Employee Center and Employee Center Pro.

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Related topics

- Getting started with Moveworks for Employee Center
- Install Moveworks for Employee Center app from store
- Upload Java KeyStore certificate
- Configure bot ID and AI assistant
- Use Moveworks on employee portal

Moveworks overview

Moveworks is an Agentic AI Platform that makes work flow by empowering employees with an AI Assistant to answer questions, take actions, and automate work across the enterprise.

Moveworks combines agentic reasoning with enterprise-ready integrations to deliver intelligent automation at scale through natural language interactions. Employees can benefit from the AI that knows your people and processes, understands your business, and gets work done.

Here is a quick overview of the product capabilities:

Moveworks overview



- **Moveworks AI-Powered Employee Assistant**: AI Assistant provides an agentic AI experience that millions of employees love for instant support and self-service.
- **Rapid Agent Development**: Agent Studio enables developers to build powerful, enterprise-ready AI agents quickly without extensive coding.
- **Unified Enterprise Search**: Agentic RAG application searches across all your systems, formats, and domains instantly.
- **Enterprise-Grade Security**: Built-in security and compliance features make agentic AI safe for enterprise deployment.
- **Advanced Agentic Reasoning**: LLM-powered Agentic Reasoning Engine that intelligently orchestrates complex multistep workflows.
- **Automated Service Management**: Built-in AI agents handle service desk operations including ticket triage, approvals, and form management.

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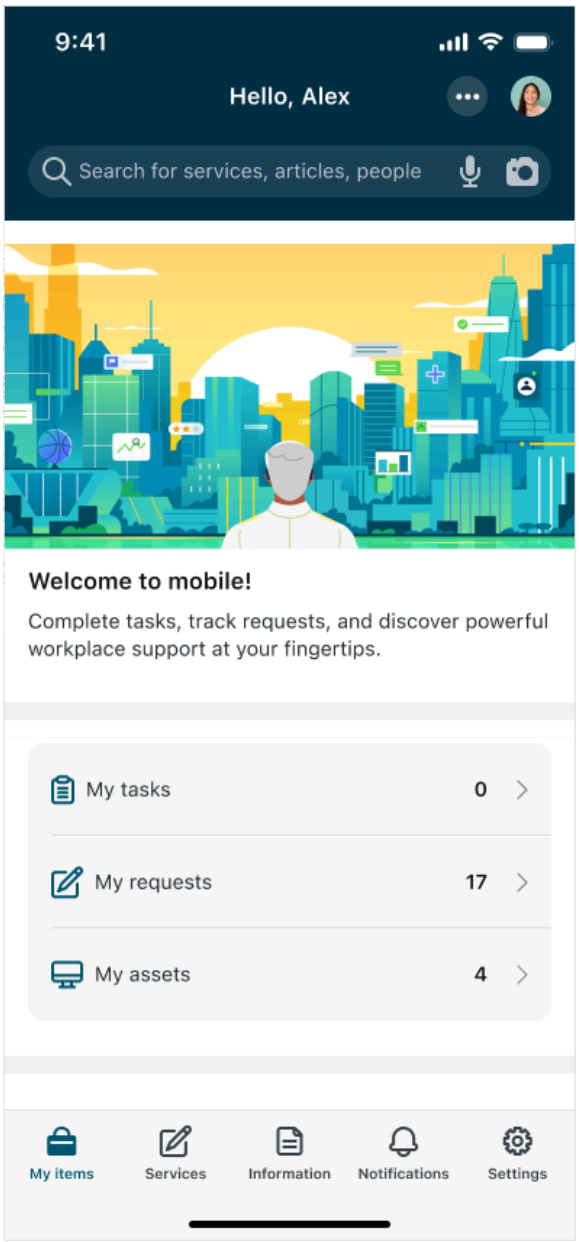
- **Productivity Amplification**: Pre-built plugins and capabilities deliver immediate productivity boosts to employees across the organization.
- **Extensive Integration Ecosystem**: Access 100+ integrations through the AI Agent Marketplace for seamless connectivity.

Moveworks unifies the enterprise systems under one intelligent layer to deliver outcomes that matter for every role, team, and business objective. For more information, see Moveworks documentation and Moveworks academy.

Now Mobile app

Enable your users to submit incidents and requests, manage tasks, and access company resources from anywhere using the Now Mobile app.

Now Mobile applet launcher features

Feature	Description
	**Features of the Now Mobile app** The Now Mobile app is a downloadable app designed to help your employees with the following tasks: • Get help by submitting requests and issues. • Find answers using global search and knowledge base. • View and report issues around your assets • View and complete tasks • Upload images and attachments to ServiceNow records • Request help from Agent Chat and Virtual Agent • Use pre-configured Siri shortcuts unique to the Now Mobile app to complete common actions. **Note:** For more information, see Base system functionality for ServiceNow mobile. **Download the app** Download the Now Mobile app for Apple iOS or Google Android from the Apple App Store or the Google Play store.

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Now Mobile applet launcher features (continued)

Feature	Description
	Access the demo Take a look at the Now Mobile app demo. The demo is a curated experience designed to show how your employees can accomplish their work from anywhere. For more information on the app, see Now Mobile app demo.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Now Mobile app demo

Access the demo in your Now Mobile app to learn how the app can help you work from anywhere using your mobile device.

The Now Mobile demo includes curated demonstrations to show how employees, new hires, and Chief Information Officers (CIO) can get work done on their mobile device.

Access the demo

In the Now Mobile app, tap **Try with a demo account**. Then select the role that matches the demo you'd like to see:

- Employee - quickly submit incidents and requests, manage tasks, and access company resources
- Chief Information Officer - quickly measure the performance of IT as a business unit, be informed of key updates, and monitor progress of major initiatives
- New Hire - get access to resources and information necessary to start a new job successfully

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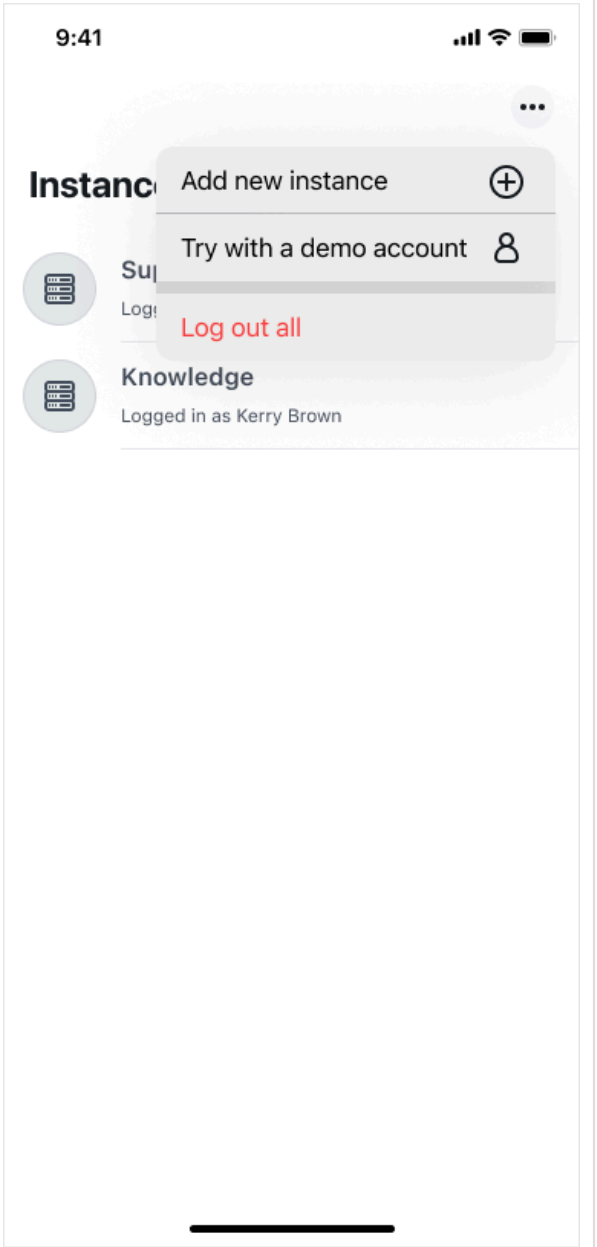
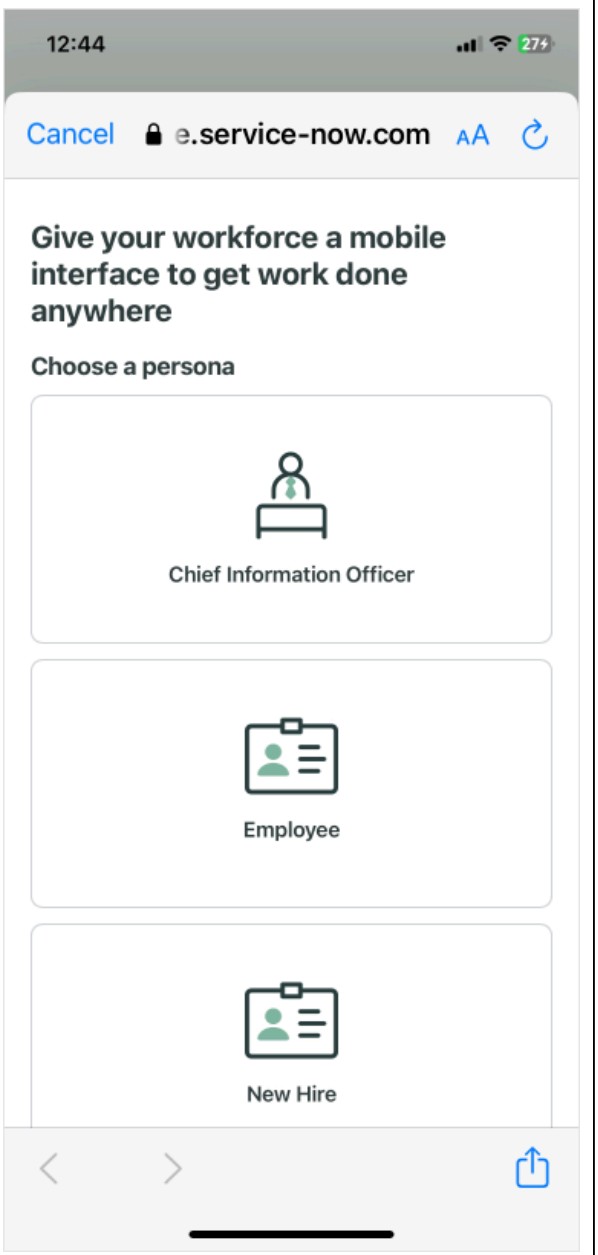
Demo screens with different personas

Demo screen	Persona selection screen
	

Demo highlights

The Now Mobile demo displays a launcher screen divided into UI sections. Tap an item in any section to open the item. For details on how launcher screens, other types of screens, and actions work together in the mobile environment, see Mobile hierarchy.

Employee

Campaigns

The carousel display shows how you can easily present targeted information to employees based on location, job role, and other key criteria. Rich media, including in-app video playback, can cover a variety of important company communications.

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Frequently Used Items

The display includes an example of shortcuts to items employee users are likely to access frequently, such as scheduling a visit to the tech lounge. These can be configured by the organization to keep them readily available for employees. For more information about the tech lounge example, see Walk-up Experience. For more information on office entry codes, see Verify your health status and compliance.

My Items

The My items section provides links to active tasks, requests, assets, and team members.

- **Tasks**

  Items assigned to a user for completion, such as approvals or policy acknowledgement, will appear in the tasks for the employee. Inline action can be taken to respond to approval requests.

- **Requests**

  Once the employee has submitted a request for an item or service the open ticket or case will be available here to track. Universal requests, indicated with a UR at the beginning of the case number, can be easily transferred between departments as needed. For more information on services and requests, see Request experience in Now Mobile.

- **Assets**

  Items assigned to a user are itemized for easy reference, making it simple to report an issue or review all checked out assets. For more information, see Hardware Asset Management.

- **Team**

  Reaching colleagues is just a tap away. In addition to contact information, profiles show examples of how deeplinks can directly launch other apps, such as a Microsoft Teams chat or a LinkedIn profile. For information on configuring native mobile functions like those used to make calls and send emails, see Mobile functions.

Services

Employees can request items or help from departments across the enterprise. Popular services make the most commonly requested needs easy to find. Other items are easy to browse by topic or can be reached via the search.

Saved

Use saved views to gain quick access to frequently used screens and views. Saved views enable you to save any screen or web page within your mobile app. Learn more about Mobile saved views.

Health

Employees have everything they need for workplace health and safety. Users can verify health, make reservations, or report vaccinations. For more information, see Safe Workplace for mobile.

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Virtual Agent Chat

Use the chat button to connect to a virtual agent. Virtual agent is an automated conversational interface you can use to address common issues, such as password resets, or email account setup. The Now Mobile uses a quick action to access chat. For more information on Virtual Agent, see Virtual Agent. The chat button on the demo launch page is a quick action. For details on how to add a virtual agent to your mobile apps, see Enable Live Agent in the Now Mobile app.

Chief Information Officer (CIO)

Value

CIOs need to always have a pulse on the value being delivered by IT to the business. Implementing this core value is delivered within the following sections:

- **Targets**

  Quickly glance at how IT is performing against its set targets. This ultimately ties to the CIOs objectives and key results (OKRs). Possible targets could be:

  - IT spend to plan YTD
  - Employee satisfaction
  - Number of projects delivered YTD

- **Investments**

  What strategies and business units are investing in IT.

- **Business Enablement**

  Review and identify any current Capability gaps and take action to address them.

- **Business Consumption**

  See the details of subscription or license costs, the vendor, type of agreement, and most importantly when a contract is ending.

Risk and Resiliency

- **Service Degradation**

  Service availability and performance issues that the CIO needs to be aware of.

- **Security and Compliance**

  Security vulnerabilities that are possible risks to the business and compliance issues that need to be addressed to avoid audits.

Execution

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- **Goals**

  Standards compliance goals as well as applications retired or cloud migration business goals.

- **Projects in Red**

  Understand what the project is slated for along with access to current and past status reports. These reports can include executive summaries on the status to decide whether or not to engage with the project.

- **Upcoming Releases**

  Single view to track all new products, features, and enhancements being delivered across the organization.

- **Digital Transformation**

  Measure and track execution of the digital transformation efforts within IT, in support of all business units.

- **Saved Items**

  Any of the cards or graphs or metrics have drill-down capability, allowing the CIO to navigate down to specific records in ServiceNow. In addition, any section of the CIO mobile has a Save item feature that can serve as bookmarks, so the CIO has a place to go directly to what is top of mind rather than having to navigate to a particular area of the mobile.

  Saved items are all available with a single tap and swipe under **Saved**at the bottom of the CIO mobile app.

New Hire

Welcome Section

Easily present targeted information to employees based on location, job role, and other key criteria. Rich media, including in-app video playback, can cover a variety of important company communications.

Get Ready

A list of common tasks from across the organization that new employees may complete as part of their onboarding experience. These tasks are lifecycle activities, which are part of the Enterprise Onboarding and Transitions application. For more information on lifecycle activities, see Configure a lifecycle event activity.

New Hire Contacts

Use the contacts in this section to view and connect with colleagues using your mobile device's built in capabilities.

For information on configuring functions like those used to make calls and send emails, see Mobile functions.

Get Informed

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Use targeted mobile campaigns to push relevant information to employees at the right moment. Tapping into this section opens a screen with helpful info about New Hire orientation.

Learn more about the Now Mobile app

Use the following links to learn more about on how to use and configure the Now Mobile app.

- Now Mobile app
- Configuring the Mobile Platform

Configuring Now Mobile

Configure options for the Now Mobile app. For example, you can link the app with a service catalog and knowledge base, personalize the greeting for the home page, and specify which records appear under **My Requests** in the **For Me** tab.

Note: Offline mode is not supported in the Now Mobile app.

For Me

This page includes these configuration options:

Greeting

Configure the greeting that your users see when they log in to the Now Mobile app. For example, you can add a hello message that includes the user's first and last name.

My To-Dos

Users can view items that are assigned to them and complete their tasks. By default, My To-Dos show the user things that they need to approve from the Requests [sc_request] and Requested Items [sc_req_item] tables. Other applications, such as HR Service Delivery, might include other types of tasks.

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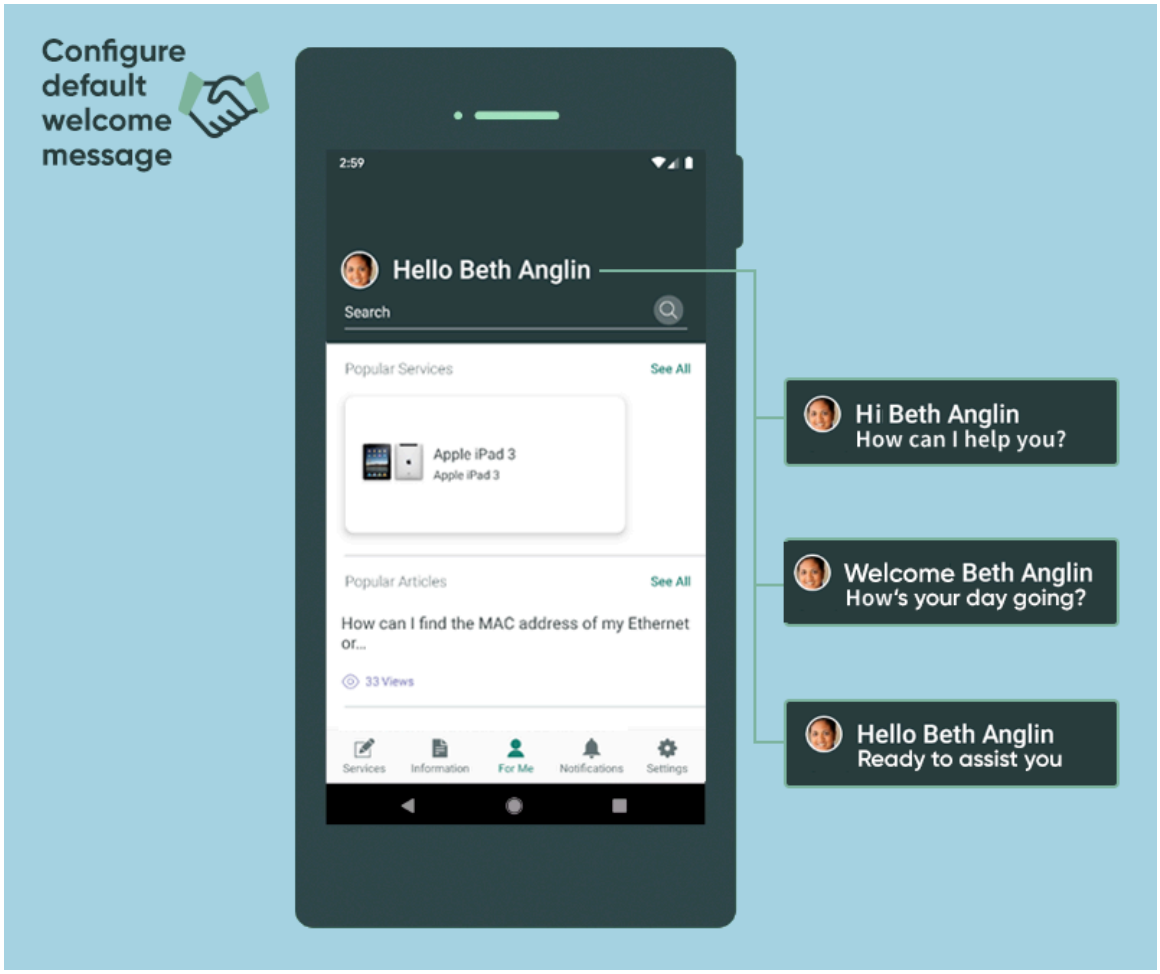

My Requests

Specify which records that you want your users to see under **My Requests** so that they can track their work assignments. For example, you can add a filter to display records that are opened by the user from the Problem table. By default, the app displays records that are opened by the user from the Incident and Requested Item tables.

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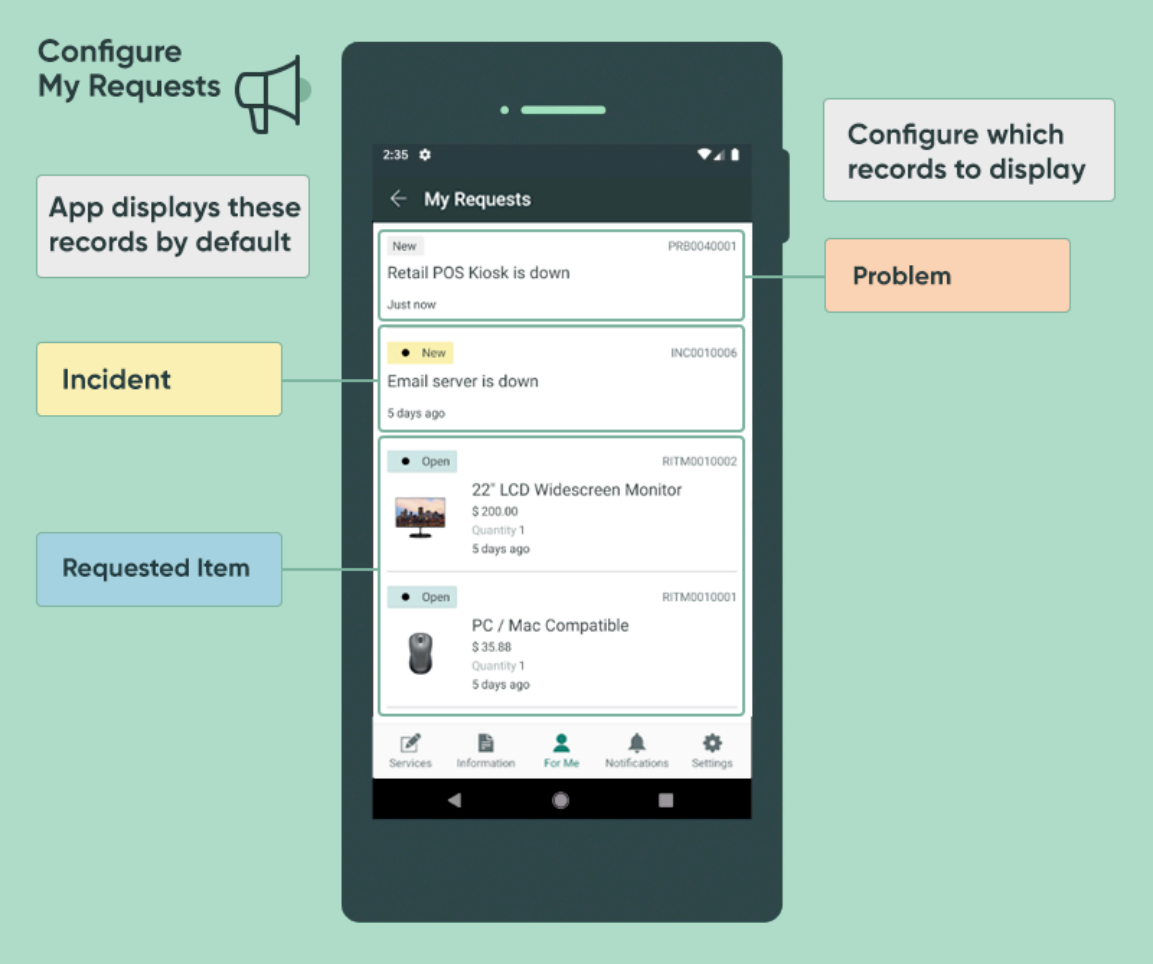

Search

Search includes these configuration options:

People search

Configure whether users can search for other users in the system. By default, people search is enabled. For people search to display results, your users must have read-only access to the User [sys_user] table. You can test people search by logging in as a user without any roles and searching for another user. If search results do not include meaningful data, for example, locations and phone numbers, update the access control lists (ACLs) on the User table to allow read access. For more information, see Access control list rules.

Analytics and suggestions

The Now Mobile app collects search data and analytics that generate search suggestions. If you are upgrading from a previous release, the search analytics do not contain any data yet. To immediately provide suggestions to your users, you can populate the search suggestions using knowledge, catalog, and user search records from the Text Searches [text_search] table.

Search Suggestions is a ServiceNow AI Platform feature. For more information, see Search Suggestions.

Items and services

Service Catalog items and services include these configuration options.

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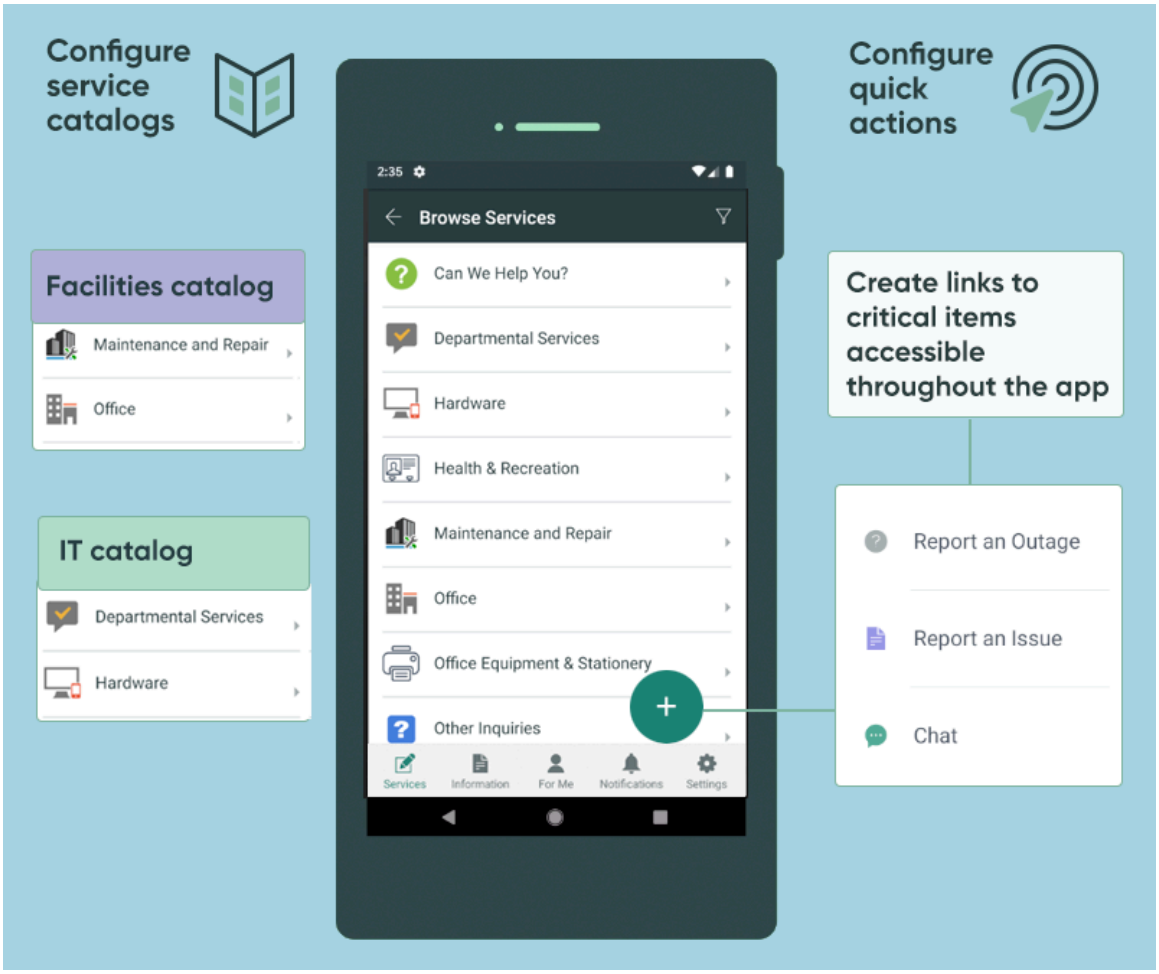
Catalog

Enable your users to view and request their associated items in the Now Mobile app. If no catalogs are selected, users can view and request items from all catalogs in the system. By default, the app uses Service Catalog.

For more information, see Now Mobile for Service Catalog.

Quick actions

Select catalog items to display as additional user menu actions. For example, add the **Report an Incident** catalog item to enable users to quickly navigate to the form. Users can only see items if they have the required user criteria permissions.



Knowledge

Enable users to view knowledge articles from the mobile app. If no knowledge bases are selected, users can view articles from all knowledge bases in the system. By default, the app uses the IT knowledge base.

For more information, see Now Mobile for Knowledge Management.

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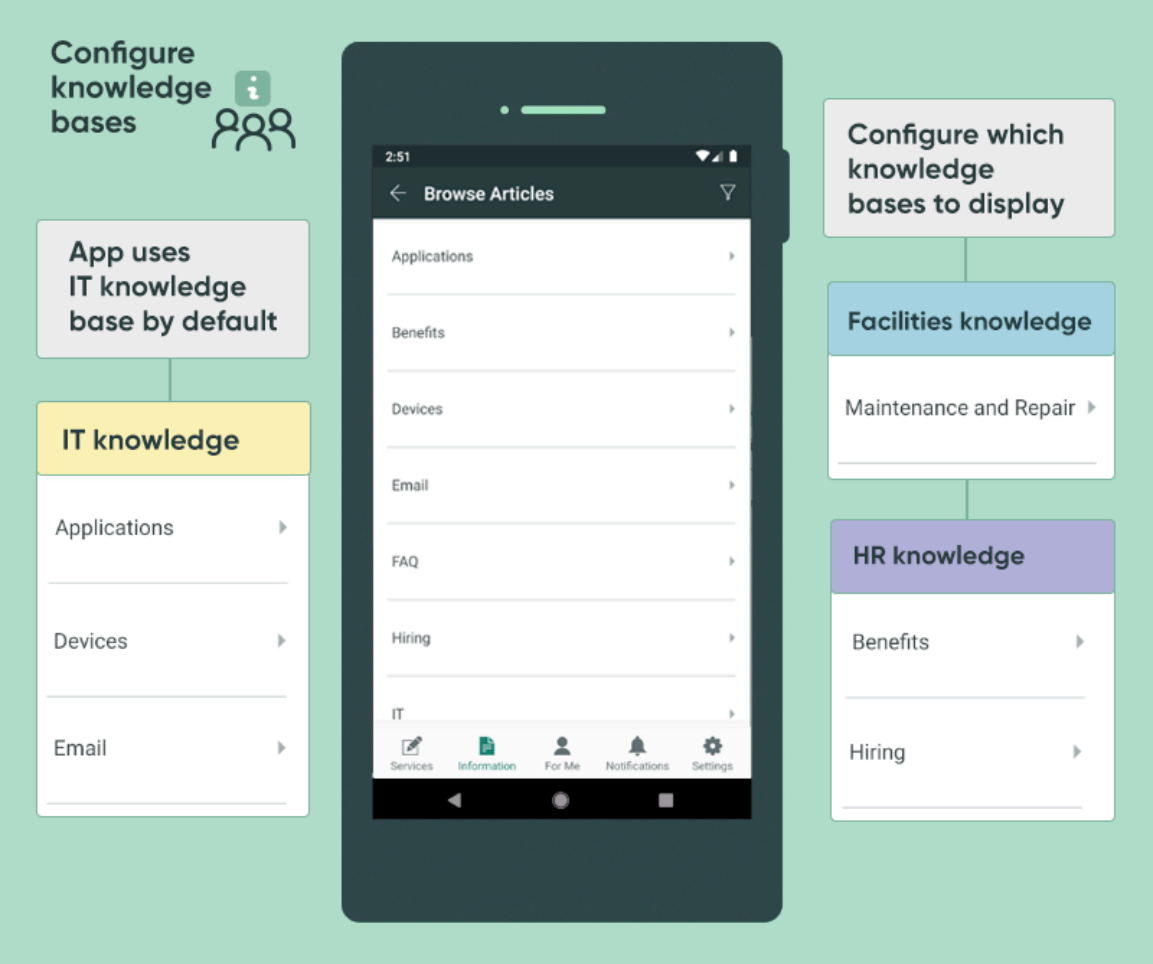

Siri shortcuts

In the base system, iOS users can use Siri shortcuts to open these pages in the app:

- Open a chat window.
- Browse items and services.
- Open my tasks.
- Open my requests.

Configure a personalized greeting

Configure the greeting that your users see when they log in to the Now Mobile app. For example, you can add a hello message that includes the user's first and last name.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Mobile App** > **Applet Launchers**.
2. In the Applet Launchers [sys_sg_applet_launcher] table, open the Homepage record.
3. Add the **Header Titles** field to the form.
4. In the **Header Titles** field, open the record.
5. Update the **Text** field as required.

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This text displays in the Now Mobile app heading.

This field uses the `{{sys_id}}` syntax to reference a variable for the first and last name of the currently logged-in user. Changing the variable is not supported.

6. Click **Submit**.

Result
When a user logs in to the Now Mobile app, they see your personalized greeting.

Configure My Requests to track open records

Specify which records that you want your users to see under **My Requests** so that they can track their work assignments. For example, you can add a filter to display records that are opened by the user from the Problem table. By default, the app displays records that are opened by the user from the Incident and Requested Item tables.

Before you begin
Role required: admin

About this task
Demonstrates configuring service catalogs, knowledge bases, and My Requests in the Now Mobile App.

Procedure

1. Navigate to **All** > **Now Mobile App** > **My Request Filters**.
2. In the My Request Filters [request_filter] table, create a filter to display records from a specific table:

   a. Click **New**.

   b. On the form, fill in the fields.

Request filter form

Field	Description
Title	Name for the filter.
Table	Table that extends the Task table. The app displays records from this table under **My Requests**.
Filter	Filter for the table. For example, you can set the filter to **[Opened by] [is (dynamic)] [Me]** to enable users to view their own requests.
Active	Option that you can select to make the filter active.
Applies to	Option that you can select to apply to **Mobile** apps.

   c. Click **Submit**.

Records from the defined filter are displayed in the app under **My Requests** in the **For Me** tab.

AI Search in mobile

The AI Search search engine in the Now Mobile platform enables users to find answers to issues and then proceed quickly with their tasks.

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The mobile platform supports two search engines within applet launchers: AI Search and Zing.

AI Search uses user data sources (people), catalog items (services), and knowledge articles. The Zing search engine uses additional data sources not associated with AI Search, for example, user tasks and requests.

- For more information on AI Search configuration, see AI Search.
- For more information about Zing configuration, see Global search for mobile.

Note: You cannot simultaneously use both AI Search and Zing search engines within the same search field. However, you can configure individual applet launchers to host a different search engine per applet. For more information, see Add AI Search to a launcher screen.

AI Search offers the following features:

- Navigation tab filters - Filters help users narrow down results on a site.
- Auto-complete - As the user enters text, AI Search predicts the query and helps formulate the user's question.
- Recent and popular searches - When the user starts to search, two categories of search answers display: the user's personal search history and the most common queries by all users on the instance.
- Auto-correct typos - Typos are auto-corrected based on indexed content.
- Synonym handling - The search engine also looks for words similar to the search term.
- Genius cards and action items - Genius result cards display the most relevant answers and offer users the option to perform actions within the card, for example, adding buttons to make a call, send an email, or add to a shopping basket.

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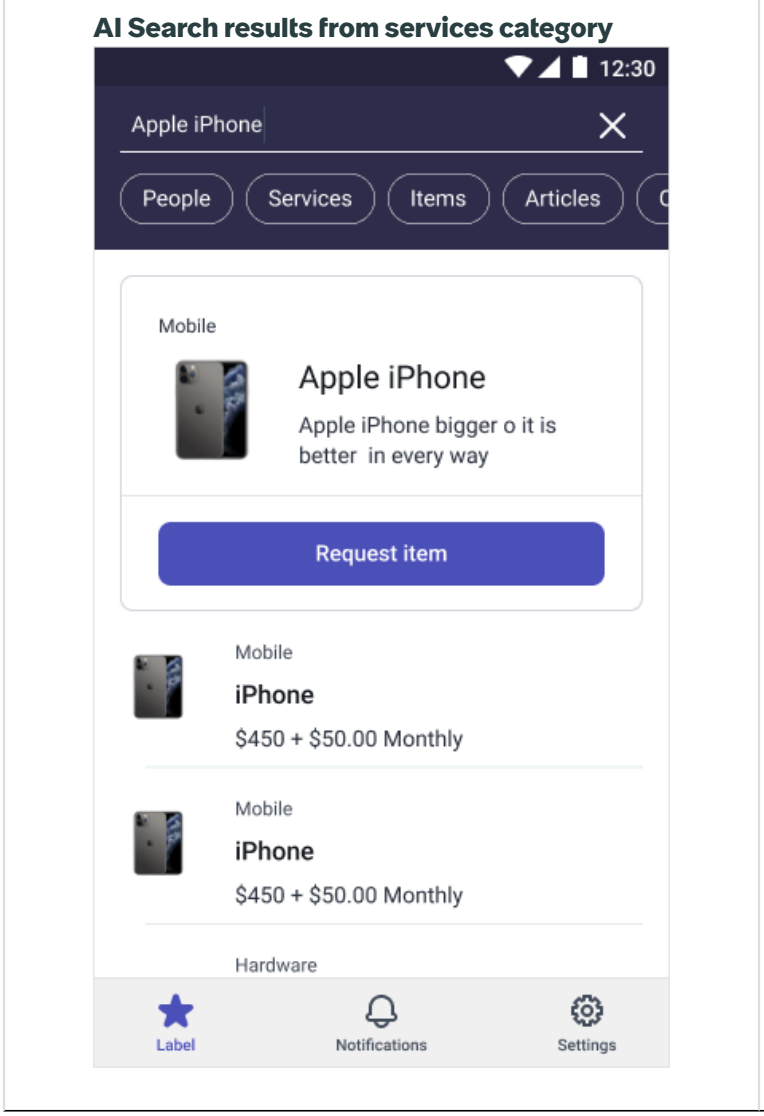
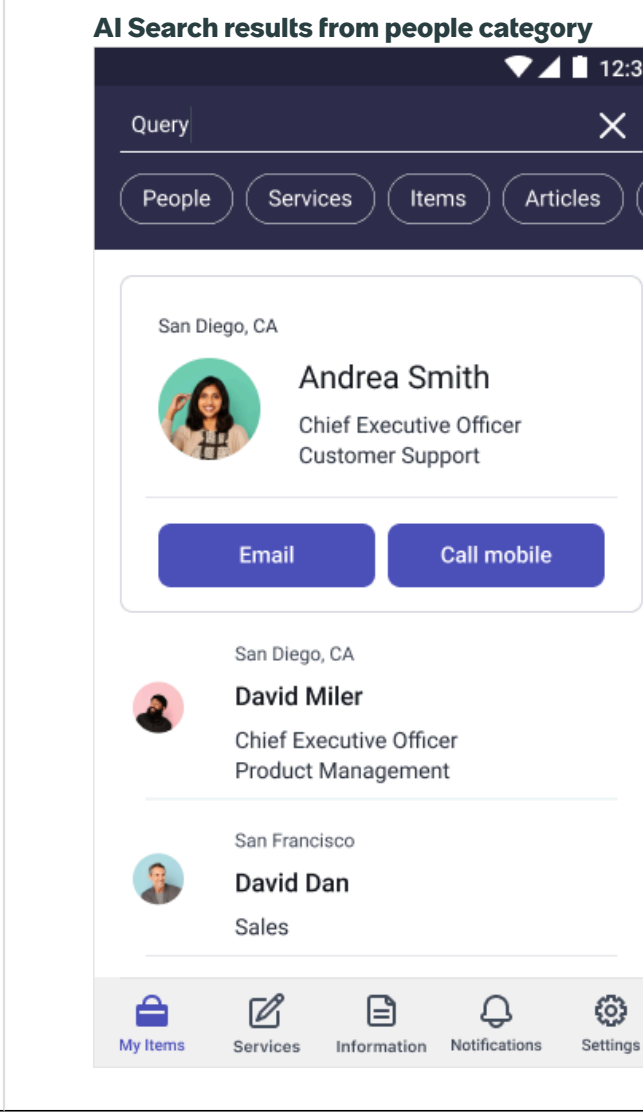
AI search results

Service category AI search	People category AI search
	

Configure AI Search for mobile devices

Configure the Now Mobile search bar to use the AI Search search engine.

Before you begin

To enable the AI Search capability to search for people and customers, ensure that you have the Employee Center Pro plugin [com.snc.employee_center_pro] installed. For more information, see Install Employee Center Pro. You must purchase a subscription before activating the plugin. For more details, see ServiceNow plugins.

Make sure you are working in a scoped application where you can add new item configurations.

Role required: admin

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Procedure

1. Change the search engine from Zing to AI Search and select the relevant profile.
   a. In the web-based UI, enter `sys_sg_global_search.list` in the filter navigator, to open a list of global search configurations.
   b. Select the record **Homepage Search - Catalog, Knowledge, People**.
   c. Select **click here** at the top of the page to edit the record.
   d. Select the reference lookup icon ( ) in the **Search Application Configuration** field, and select **Open Record** to open the Search Context Configuration form.
   e. Select AI Search in the **Search Engine** field.
   f. Select the information icon ( ) in the **Search Profile** field and select the NowMobile Default Search profile.
   g. Select **Yes** in the confirmation message.
   h. Select the form header ( ) and select **Save**.
2. Remove the item configuration, Catalog Item Main item.
   a. In the web-based UI, enter `sys_sg_global_search.list` in the filter navigator to reopen the list of global search configurations.
   b. Select the record **Homepage Search - Catalog, Knowledge, People**.
   c. In the **Catalog Item Main Item** row, right-click the information icon ( ) and select **Open Link in New Tab**.
   d. Select **Delete** in the top-right of the page and select **Delete** in the subsequent confirmation message.
3. In the Global Search M2M Item Configurations related list, add the new catalog item to be the main item.
   a. Select **New**.
   b. Select the reference lookup icon ( ) in the **Item Configuration** field.
   c. In the Item Configuration form search bar, search for `Catalog Item Search Result Main Item` and then select the entry
   d. Select **Submit**.
4. In the Global Search M2M Item Configurations related list, remove the two existing knowledge item configuration records.
   a. Select the **Knowledge article search main item** row and the **Knowledge article search main item (viewcount1)** row.
   b. Select **Actions on selected rows**, and then select **Delete**.
   c. Select **Delete** in the subsequent confirmation message.
5. In the Global Search M2M Item Configurations related list, add the new knowledge item as the main item.
   a. Select **New**.
   b. Select the reference lookup icon ( ) in the **Item Configuration** field.

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c. In the Item Configuration form search bar, search for `Knowledge AIS Search Main Item` and then select the entry.

d. Select **Submit**.

6. Activate the view configuration for the people-based records.

a. In the web-based UI, enter `sys_sg_master_item.list` in the filter navigator, to open a list of item configurations.

b. In the Name search bar, search for `People Search Main Item`.

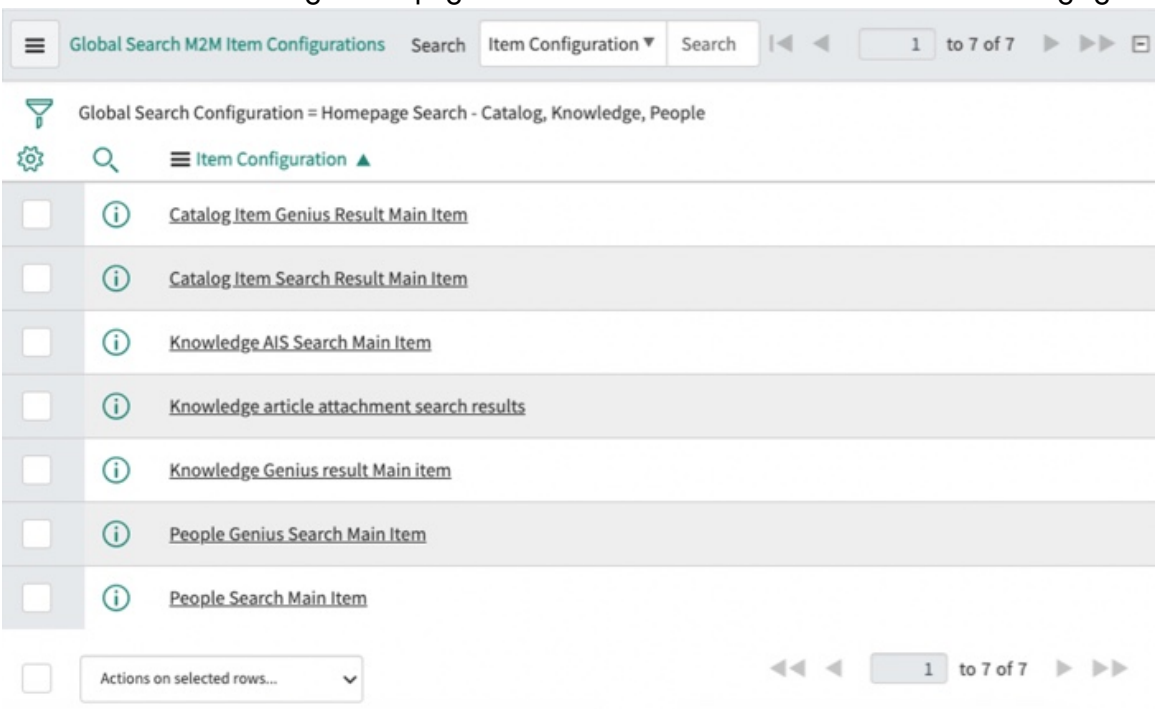
c. Select the information icon ( ) next to People Search Main Item and select Open Record.

d. In the Item Configuration form, select **Use card**.

e. Select the menu icon ( ) and select **Save**.

Result

The Global Search Configuration page should contain the items shown in the following figure.



Customize AI Search results

Customize AI Search results to provide users with a tailored search experience.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Mobile** > **Search** > **Search Configurations.**.
2. Select the AI Search configuration to customize.
3. On the form, fill in the fields.

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Search Context Configuration form

Field	Value
Name	This field is automatically set to the name of the search context configuration.
Search Engine	This field is automatically set to the selected search engine. For this configuration, the value is AI Search.
Search Profile	The search experience offered to users. This field is automatically set to **NowMobile Default Search Profile**.
Search Results Limit	The number of standard results displayed per page not including Genius results. The default value is 10.
Genius Results Limit	Number of Genius results listed at the top of the results. The default value is 1 and the maximum value is 3.
Enable Typo Handling	Option for replacing misspelled search query terms with auto-correction terms derived from indexed content.

4. **Optional:** Modify the display name and the navigation tab filters for the People, Services, and Articles categories.
   These filters display under the search bar.

   a. Select the **Navigation Tabs** tab.

   b. Select the information icon next to either **People**, **Articles**, or **Services** and select **Open Record** to open the record for that navigation tab.

   c. On the form, fill in the fields.

Navigation Tab form

Name	Name of the navigation tab category.
Active	Option for determining whether the navigation tab filter displays.
Order	The position in which the navigation tab displays. The lower the order value, the further left it displays.
Label	Label to display for the navigation tab filter in the search application.
Search Context Config	This field is automatically set to the name of the search context configuration.

   d. Repeat this process for each category you want to display.

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5. **Optional:** Customize the Autocomplete Suggestions tab, which relates to the display of relevant auto-complete suggestions as the user enters text.

   Note: The only options available for mobile applications are the section headers, **Recent searches** and **Popular searches**.

   a. Select the Autocomplete Suggestions tab.

   b. Select the information icon ( ) next to either **Recent searches** or **Popular searches** and select **Open Record** to open the record for that navigation tab.

   c. On the form, fill in the fields.

Suggestion Reader Group form

Suggestion Type	(Optional) Application-specific name for the auto-complete suggestion type. This field is automatically set.
Section Header	(Optional) Label that displays auto-complete suggestions. Available options are: ▪ **Popular Searches** - Displays search queries commonly submitted by all users searching on this instance. ▪ **Recent Searches** - Displays search queries drawn from the user's recent personal search history for the search application.
Order	Position in which the section headers appear. The higher the order value, the lower the section is in the list of suggestions.
Suggestion Limit	The maximum number of suggestions to show at any one time in this section. Default is 5.
Click-in Mode	Option for controlling the section header display. ▪ If selected, auto-complete suggestions display when the user first taps in the empty application search field. ▪ If cleared, auto-complete suggestions display as the user types search query terms into the application search field.

   d. Repeat this process for each section header you want to display.

What to do next

After you have customized the display of your search results, select the AI Search results to be displayed in an applet launcher. See, Add AI Search to a launcher screen.

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Consider configuring a customized empty state display to inform users that their search has not produced any results. If you do not customize an empty state, a preconfigured default empty state is displayed. To customize an empty state, see Configure an empty state for search results.

Add AI Search to a launcher screen

Configure your launcher screen to use the AI Search search engine.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Mobile** > **Mobile App Builder**.
   The Mobile App Builder opens in a new browser tab and displays the application scope selection screen.
2. Search for the application scope you are working in and then select the name of the application scope.
   The Mobile App Builder categories home screen displays.
3. Select the **Screens** category, and then select the launcher you want to update.
4. In the **Search configuration** section, select the search configuration record you wish to associate with your search option.
5. Select **Save**.

Define people search as inactive

Configure whether users can search for other users in the system. By default, people search is enabled.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Now Mobile App** > **Applet Launchers**.
2. Open the page where you want to disable people search.
3. In the **Search Configuration** field, select **Homepage Search - Catalog and Knowledge**.
4. Click **Update**.

Result
Your users can no longer see search results for other users in the system.

Configure catalogs

Enable your users to view and request their associated items in the Now Mobile app. If no catalogs are selected, users can view and request items from all catalogs in the system. By default, the app uses Service Catalog.

Before you begin
Role required: admin

About this task
Demonstrates configuring service catalogs, knowledge bases, and My Requests in the Now Mobile App.

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Procedure

1. Navigate to **All** > **Now Mobile App** > **Catalogs**.
2. **Optional:** In the portal catalogs [m2m_sp_portal_catalog] table, add a catalog in addition to the base system catalog, or change the catalog that is associated with the base system record:
   a. Click **New** or open the base system record.
   b. On the form, fill in the fields.

Portal catalogs form

Field	Description
Portal	Portal that you select. Select **Employee Center**.
Catalog	Catalog that you would like to associate with the app.
Order	Number that indicates the order that the configurations should run. If there are multiple configurations on a portal, the system runs the configurations from the lowest to the highest order that you selected.

Result
Your users can view and request items from all added catalogs.

Configure knowledge bases

Enable users to view knowledge articles from the mobile app. If no knowledge bases are selected, users can view articles from all knowledge bases in the system. By default, the app uses the IT knowledge base.

Before you begin
Role required: admin

About this task

Procedure

1. Navigate to **All** > **Now Mobile App** > **Knowledge Bases**.
2. **Optional:** In the portal knowledge bases [m2m_sp_portal_knowledge_base] table, add a knowledge base in addition to the IT knowledge base.
   a. Click **New**.
   b. On the form, fill in the fields.

Portal knowledge bases form

Field	Description
Active	Option that you can select to make the configuration active.
Portal	Portal that you select. Select **Mobile Employee Service Portal**.

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Field	Description
Knowledge Base	Knowledge base that you would like to associate with the app.
Order	Number that indicates the order that the configurations should run. If there are multiple configurations on a portal, the system runs the configurations from the lowest to the highest order that you selected.

3. **Optional:** Change the default knowledge base that is associated with the Now Mobile app.
   a. In the **Portal** field, open the record with **Mobile Employee Service Portal**.
   b. In the **Knowledge Base** field, select the knowledge base that you would like to associate with the app.
   c. Click **Update**.

Result

Users can select the  icon on the applet launcher page to open the quick action.

Configure Siri shortcuts for Now Mobile

Configure Siri shortcuts for quick access to common features on your iOS mobile device.

Before you begin

Role required: admin

Procedure

1. Log in to a ServiceNow mobile app.
2. On the navigation bar, tap the **Settings**.
3. On the settings page, tap **Siri shortcuts**.



4. In the Siri shortcuts section, tap the plus button ( ) to configure a Siri shortcut.

> **Note:** The currently available shortcuts are limited to **Open My Tasks**, **Browse Services**, and **Open My Requests**.

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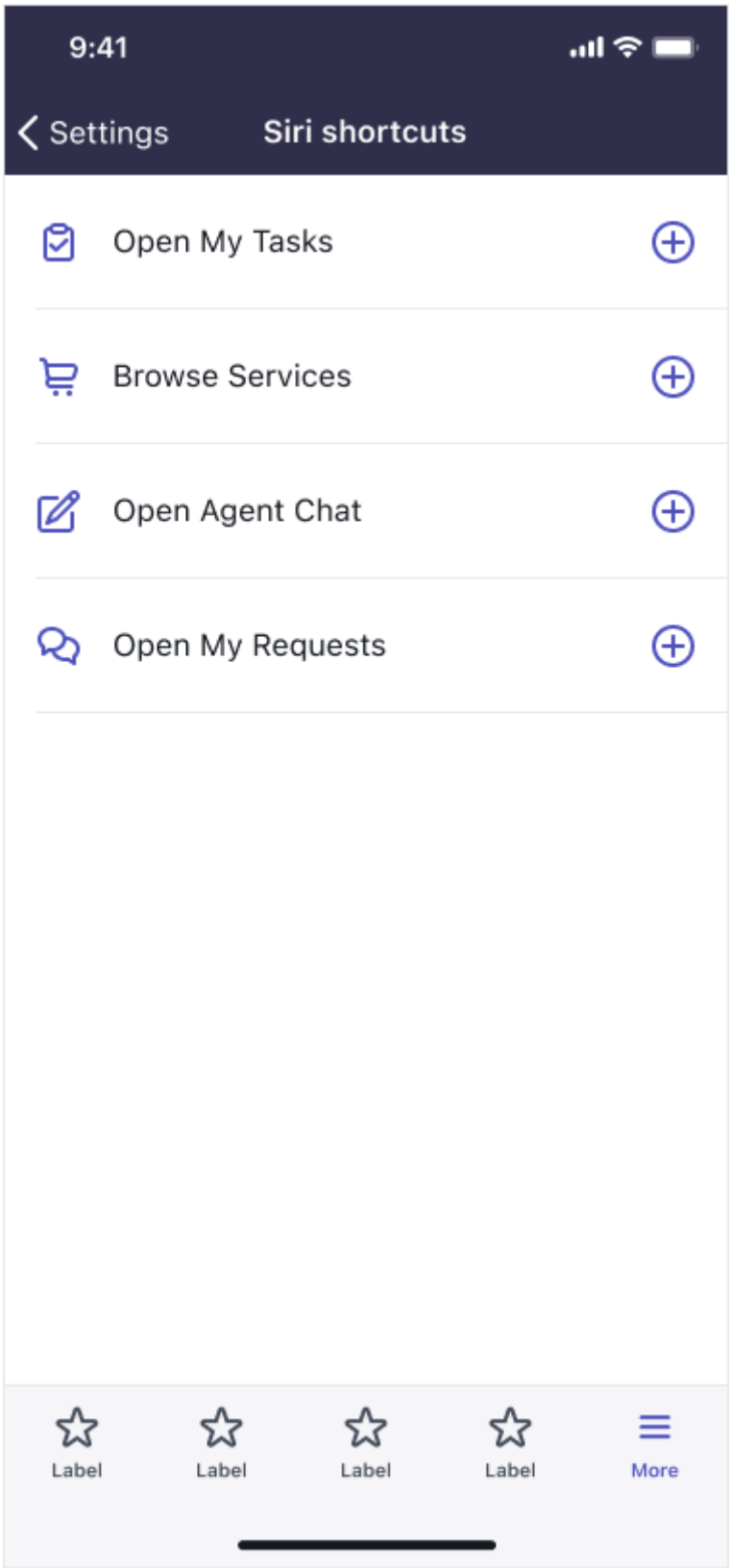

5. In the **When I say** field, add the phrase you want to say to Siri to open your app and use the selected shortcut.

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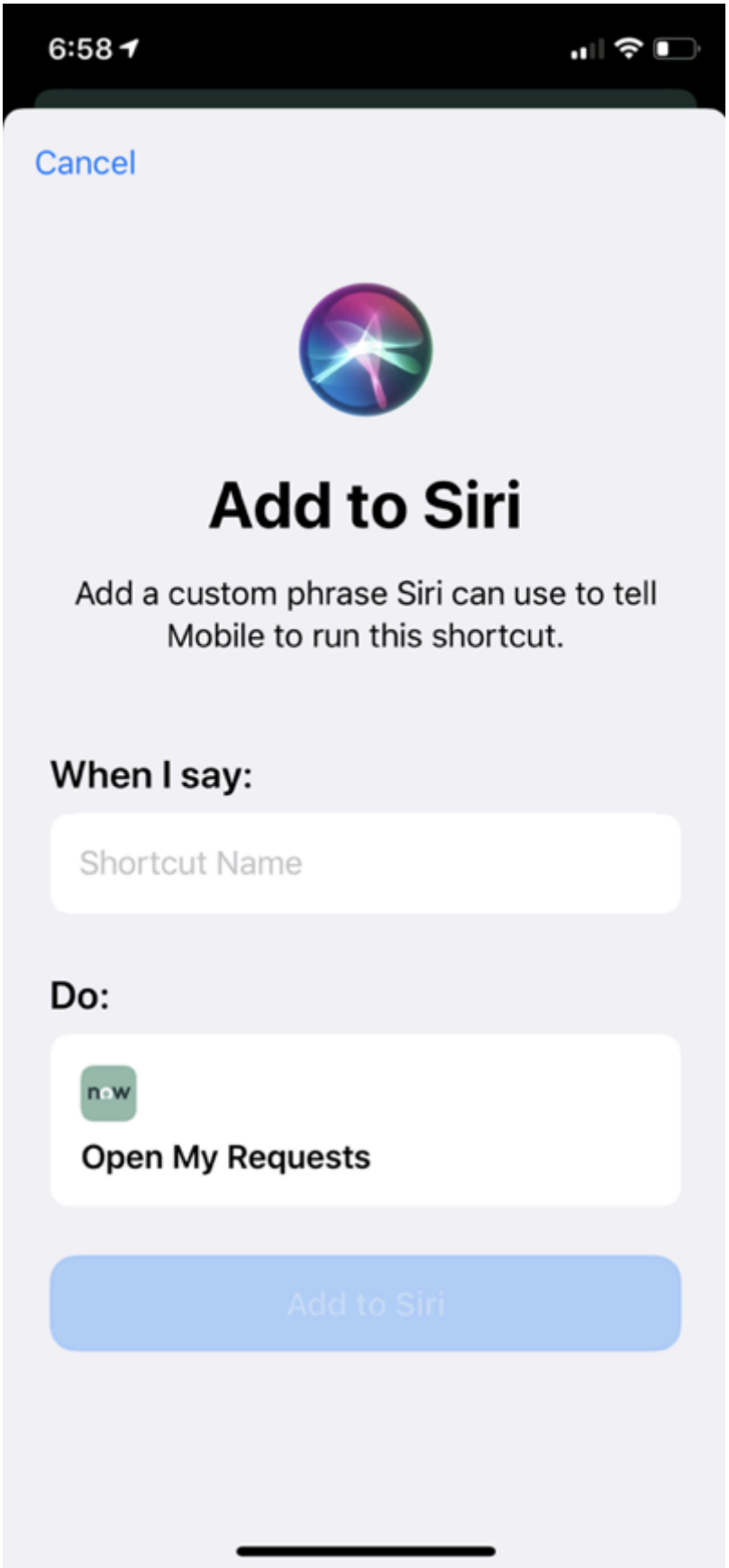

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6. Tap **Add to Siri**.

Note:

- You can repeat the process to configure the remaining shortcuts, or change the phrase used to activate previously configured shortcuts.
- You can also set up the Siri shortcuts in the Apple **Shortcuts** application.

Add a quick action in your mobile applications

Provide your users with a shortcut, which is also known as a quick action, to an item or action in your mobile apps. Quick actions appear on the applet launcher page.

Before you begin

Role required: admin

About this task

Procedure

1. Navigate to **All** > **Now Mobile App** > **Applet Launchers**.
2. In the applet launchers [sys_sg_applet_launcher] table, open the applet launcher record that you would like to add the catalog item to.

   For example, open the Homepage record to add the catalog item under the  icon on the home page.
3. Select the **Body** tab.
4. Add a record under the Quick Actions Menu Maps related list.
   If you're not able to insert a row, make sure that you're in the **ServiceNow Now Mobile App Screens and Applet Launcher** application scope.
5. Add one of the quick actions from the following options.

Options for quick actions

Quick action	Description
Report an Issue	Opens the **Create Incident** catalog item.
Chat	Opens Agent Chat.

Result

Your users can open the quick action by selecting the  icon on the applet launcher page.

Create a quick action in your mobile applications

Provide easy access to an important item by creating a quick action. For example, you can create a quick action that opens a Service Catalog item.

Before you begin

Role required: admin

Procedure

1. Create a function for the quick action.

   a. Navigate to **System Mobile** > **Functions**.
   The Function [sys_sg_button] table opens.

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b. Click **New**.

c. On the form, fill in the fields.

Button fields form

Field	Description
Name	Name of the function record.
Description	Description to enable other users to easily understand the purpose of the function.
Type	Type of quick action that you want to create. To create a quick action that opens a Service Catalog item, select **URL**. For more information about function types, see Configure a smart button.
Context	Whether the function applies at the record or table level. ▪ Record: Action only applies at the record level. For example, updating a field. ▪ Global: Action that only applies at the table level. For example, creating or deleting a record. For this example, select **Global**.
Link Label	Label for the link. This value does not display in the user interface.
Link URL	Relative URL for the item that you want to open when the user clicks the function. For example, to open a Service Catalog item in the Now Mobile portal, enter `/mesp?id=sc_cat_item&sys_id=060f3afa3731300054b6a3549dbe5d3e`. This field only displays if the **Type** field is **URL**.
Relative URL	Option that is selected to determine whether the URL is relative. For this example, choose **Selected**. This field only displays if the **Type** field is **URL**.
Condition	
Table	Table on which the condition runs.
Condition	Condition that should be met for the action to be successful. For a catalog item, enter `var item = new sn_sc.CatItem('3f1dd0320a0a0b99000a53f7604a2ef9'); answer = item.canView() && item.isVisibleServicePortal();` to display the quick action only when the end user has permissions to view the item.
Roles	Roles that you want to user to have to view the quick action.

2. Add an instance of the function that you created to the page.

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a. In the native UI, navigate to **Now Mobile App** > **Applet Launchers**.

b. Open the applet launcher record that you would like to add the quick action to.

c. Select the **Body** tab.

d. Insert a new row in the Quick Actions Menu Maps related list.
If you're not able to insert a row, make sure that you're in the **ServiceNow Now Mobile App Screens and Applet Launcher** application scope.

e. Click the magnifying glass to look up an item
The Function Instances [sys_sg_button_instance] table opens.

f. Click **New**.

g. On the form, fill in the fields.

Function instance form

Field	Description
Name	Name of the function instance.
Description	Description to enable other users to easily understand the purpose of the function instance.
Parent	Page on which you are adding the quick action. For example, select **Applet Launcher: Homepage** to add the quick action to the home page. Select a value in the **Parent table** field first.
Application	Application scope.
Parent table	Table that contains the record type where the button appears. For this example, select **applet Launcher [sys_sg_applet_launcher]** to add the quick action to an applet launcher page.
Function	Function record that you created earlier.
Label	Label to help the user understand what the quick action opens. For example, `Report an outage`.
Location	Location where the button appears in the UI. For this example, select **Quick Action**.
Icon	Icon to display next to the label. For more details on mobile icons, see Mobile icons. **Note:** Not all listed icons work with quick actions. To see a list of compatible icons, filter your list where the **Icons** field contains `now-mobile-icons-buttons`. **Note:** The **Icons** field is not on the icon list by default. To add the **Icon** field to your list, right-click the list header and select **Configure** > **List Layout**. Then, add the *Icon* field to the selected list. You should see the icon field on your reference field list.

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Field	Description
Order	Number that indicates the order that the functions are listed. If there are multiple instances in the same location, the app displays them from the lowest to the highest.

h. Click **Submit**.

i. Save the applet launcher record.

Result

Your users can open the quick action by selecting the + icon on the applet launcher page.

Enable Live Agent in the Now Mobile app

Activate the Chat quick action to allow your users to ask for help from a virtual or live agent from the Now Mobile home page.

Before you begin

Role required: admin
Ensure that the Agent Chat plugin is active. For more information, see Agent Chat.

About this task

Chat is enabled from the Requests and Knowledge Articles pages by default.

Note: Connect Chat is not supported in the Now Mobile app.

Procedure

1. Navigate to **All** > **Now Mobile App** > **Applet Launchers**.
2. In the Applet Launchers [sys_sg_applet_launcher] table, open the Homepage record and select the **Body** tab.
3. Under the Quick Actions Menu Maps related list, open the Chat record.
4. Select **Active** to activate the record.
5. Click **Update**.

Result

Users can select Chat in the Homepage quick actions menu to ask for help from a live or virtual agent.

Related topics

ITSM Virtual Agent conversations

Populate search suggestions in the mobile apps

If you are upgrading from a previous release, run a script to populate search suggestions with data from a platform search table to provide search suggestions to your users. Alternatively, you can wait until users search for keywords instead of running this script.

Before you begin

Role required: admin
In new instances, the search suggestions are enabled by default. In upgraded instances, you must enable the search suggestions. For more information, see Enable search suggestions.

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About this task

The ServiceNow AI Platform collects search data and analytics that generate search suggestions. If you are upgrading from a previous release, the search analytics do not contain any data yet. To immediately provide suggestions to your users, you can populate the search suggestions using knowledge, catalog, and user search records from the Text Searches [text_search] table.

Search suggestions improve over time as more people use the app. Search Suggestions is a ServiceNow AI Platform feature. For more information, see Search Suggestions.

Warning: Populating search suggestions can be a resource-intensive task that may take a while to complete. Do not run this script during peak hours. Populating search suggestions is not supported on domain-separated instances.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Open the **Populate Suggestions to avoid Cold Start - NowMobile App** scheduled job.
3. Activate the record and select **Execute Now**.
   Running this scheduled job populates the Search Events [sys_search_event], Search Source Events [sys_search_source_event], and Search Suggestions [sys_search_suggestion] tables with records from the Text Searches [text_search] table.

Result

Users see suggestions when they start typing in a search field in the Now Mobile app.

ServiceNow Add-in for Microsoft 365

Create an add-in with customized office controls and quick links for employees. Increase efficiency by allowing employees to submit requests directly from their Microsoft 365 applications.

Get started

Explore	Configure
	
Provide quick links to reduce the time taken to submit incidents, cases, or catalog requests.	Configure the add-in and map email fields to catalog items or forms.

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Use	Reference
	
Request catalog items or create incidents and cases directly from your emails.	Information about the lists and forms used in the application.

Troubleshoot and get help

- Ask questions and explore other resources for ServiceNow Add-in for Microsoft 365 in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring ServiceNow Add-in for Microsoft 365

ServiceNow Add-in for Microsoft 365 provides quick links to employees and reduces the time taken to submit incidents, cases, or catalog requests.

ServiceNow Add-in for Microsoft 365 overview

The ServiceNow Add-in for Microsoft 365 can be used to create an add-in with customizable office controls, map email fields to catalog items or forms, and provide employees with quick links to raise requests from their Microsoft 365 applications.

ServiceNow Add-in for Microsoft 365 users

Users

User	Description
Administrator	Administrators manage the installation and configuration of the ServiceNow Add-in for Microsoft 365. They can also map fields from the email to the catalog item or form.
Employee	Employees use the ServiceNow add-in in their Microsoft Outlook client to create incidents or cases based on emails.

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ServiceNow Add-in for Microsoft 365 benefits

ServiceNow Add-in for Microsoft 365 benefits

Benefit	Feature	Users
Configure your add-in with customizable office controls.	Create a manifest file	Administrators
Map email fields to a catalog or form to reduce the time taken by employees to raise a request.	• Map email fields to a catalog item • Map email fields to a form	Administrators
Raise a request from a Microsoft 365 application.	Raise a request using the ServiceNow Add-in for Microsoft 365	Employees

What to explore next

To learn more about configuring and using ServiceNow Add-in for Microsoft 365, see:

- Configuring ServiceNow Add-in for Microsoft 365
- Using ServiceNow Add-in for Microsoft 365
- ServiceNow Add-in for Microsoft 365 reference

Configuring ServiceNow Add-in for Microsoft 365

Configure the ServiceNow Add-in for Microsoft 365 and map the email fields to catalog items or forms.

Configuration overview

Note:

- The add-in can be used in Microsoft 365 applications, but field mapping is only available for emails and can only be used in Microsoft Outlook.
- ServiceNow Add-in for Microsoft 365 is only supported for Microsoft Outlook 2019 or later versions.
- Actions that require the *admin* role, can also be performed with the *sn_outlook_addin.outlook_addin_setup* role.

Install the ServiceNow Add-in for Microsoft 365

You can install the ServiceNow Add-in for Microsoft 365 application (sn_outlook_addin) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the ServiceNow Add-in for Microsoft 365 application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with ServiceNow Add-in for Microsoft 365:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with ServiceNow Add-in for Microsoft 365.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the ServiceNow Add-in for Microsoft 365 application (sn_outlook_addin) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Create a manifest file

Create and download a manifest file with the configurations that you want to enable for the ServiceNow Add-in for Microsoft 365.

Before you begin

Role required: sn_outlook_addin.outlook_addin_setup, sn_hr_sp.admin, sn_hr_sp.esc_admin

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Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In Manifests**.
2. On the Office Manifests list, select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Office Manifest form.

   You can also configure single sign-on (SSO) for your add-in. For more information, see Configure single sign-on for ServiceNow Add-in for Microsoft 365.
4. Save the record.
5. On the Office Control related list, select **New**.
6. On the form, fill in the fields.
   For a description of the field values, see Office Control form.

   Note: For Office Controls of the type Menu, you can create menu items by using the related list in the Office Control record.
7. **Optional:** On the Office Controls related list, set the Order and Domain for the records.
8. On the Office Manifest record, select **Activate**.
   This step is applicable if you did not select the **Active** field while creating the record.

Result

The manifest is configured and activated for the ServiceNow Add-in for Microsoft 365. You can download the manifest file by selecting **Download Manifest** on the Office Manifest record.

What to do next

- Configure single sign-on for ServiceNow Add-in for Microsoft 365
- Upload a manifest to the Microsoft admin center

Configure single sign-on for ServiceNow Add-in for Microsoft 365

Configure single sign-on (SSO) for your add-in so users don't have to sign-in to Employee Center.

Before you begin

Role required: sn_outlook_addin.outlook_addin_setup, sn_hr_sp.admin, sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In Manifests**.
2. From the Office Manifests list, select the manifest that you want to configure.
3. On the Office Manifest form, select **Login Page not Required**.

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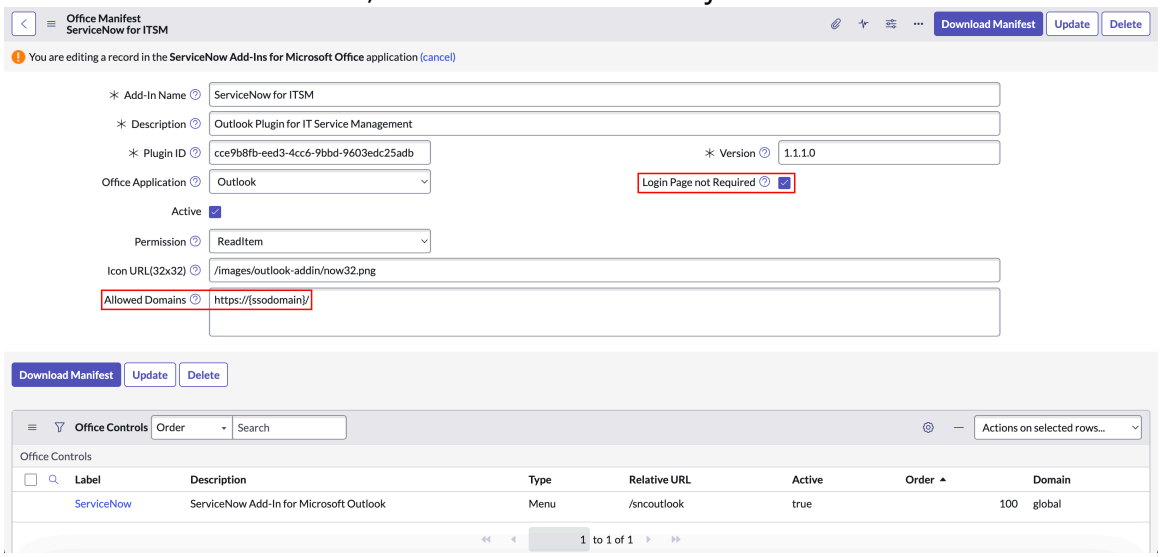
4. In the **Allowed Domains** field, enter the SSO domain for your add-in.



Upload a manifest to the Microsoft admin center

Upload the manifest file to the Microsoft admin center to enable the add-in for all employees.

Before you begin

Ensure that you have downloaded a manifest file for the add-in. For more information, see Create a manifest file.

Role required: Microsoft Admin

Procedure

1. Log in to the Microsoft admin center.
2. Navigate to **Settings** > **Integrated apps**.
3. On the Integrated apps page, select the **Add-ins** link.
4. On the Add-ins page, select **Deploy Add-In**.
5. Select **Next**, then select **Upload custom apps**.
6. Select **I have the manifest file (.xml) on this device**, then select **Choose file**.
7. Select the manifest file that you created for the add-in.
8. On the Deploy a new add-in page, select **Upload**.
9. Deploy the add-in from the admin center.
   For more information about deploying add-ins, see Deploy an Office Add-in using the admin center in the Microsoft documentation.

Map email fields to a catalog item

Map email fields to catalog item fields to pre-fill information and reduce the time taken to raise a request.

Before you begin

Role required: sn_outlook_addin.outlook_addin_setup, sn_hr_sp.admin, sn_hr_sp.esc_admin

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Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Catalog Mapping Configurations**.
2. On the Catalog Mapping Configurations list, select **New**.
3. On the Catalog Mapping Configurations form, fill in the fields.

   For a description of the field values, see Catalog Mapping Configurations form.

   Note: The fields from Microsoft Outlook are based on the Extension Point Type selected in the manifest file. Ensure that the catalog item matches the catalog item in the office controls of the add-in manifest. For more information about the manifest, see Create a manifest file.

4. Save the form.
   A Catalog Mapping Configuration record is created. You can add Office Mailbox to Catalog Field Mapping records to map individual fields.
5. In the Office Mailbox to Catalog Field Mappings related list, select **New**.
6. On the Office Mailbox to Catalog Field Mappings form, fill in the fields.
   For a description of the field values, see Office Mailbox to Catalog Field Mappings form.
7. Save the form.
   An Office Mailbox to Catalog Field Mappings record is created. You can create more records to map fields based on your requirement.

Map email fields to a form

Map email fields to form fields to pre-fill information and reduce the time taken to submit an incident or a case.

Before you begin

Role required: sn_outlook_addin.outlook_addin_setup, sn_hr_sp.admin, sn_hr_sp.esc_admin

Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Form Mapping Configurations**.
2. On the Form Mapping Configurations list, select **New**.
3. On the Form Mappings Configurations form, fill in the fields.

   For a description of the field values, see Form Mapping Configurations form.

   Note: The fields from Microsoft Outlook are based on the Extension Point Type selected in the manifest file. Ensure that the table matches the table in the office controls of the add-in manifest. For more information about the manifest, see Create a manifest file.

4. Save the form.
   A Form Mapping Configuration record is created. You can add Office Mailbox to Catalog Field Mapping records to map individual fields.
5. In the Office Mailbox to Form Field Mappings related list, select **New**.
6. On the Office Mailbox to Form Field Mappings form, fill in the fields.
   For a description of the field values, see Office Mailbox to Form Field Mappings form.
7. Save the form.
   An Office Mailbox to Form Field Mappings record is created. You can create more records to map fields based on your requirement.

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Using ServiceNow Add-in for Microsoft 365

Use the ServiceNow Add-in for Microsoft 365 to request catalog items or create incidents and cases directly from your emails.

Get a custom add-in for Microsoft Outlook

Get the custom add-in for your Microsoft Outlook client to use the features configured by your admin.

Before you begin

The add-in is available only if the admin has deployed the add-in in the Microsoft admin center.

Important: ServiceNow Add-in for Microsoft 365 is only supported for Microsoft Outlook 2019 or later versions.

Role required: None

Procedure

1. Log in to the Microsoft Outlook client.
2. From the Tools menu, select **Get Add-ins**.
3. In the Office Add-ins window, select **Admin-managed**.
4. Search for the add-in deployed by your admin, then select **Add**.

   Example
   For example, search for ServiceNow Add-in for Microsoft 365, then select **Add**.

Result

The custom add-in is added to your Microsoft Outlook client. You can use it to request catalog items or open incidents and cases based on your emails.

Raise a request using the ServiceNow Add-in for Microsoft 365

Open a relevant catalog item or form to raise a request with pre-filled information from your email.

Before you begin

The following procedure is for raising a request from Microsoft Outlook. You can use the add-in to raise a request from any Microsoft 365 app that is selected by the admin.

Role required: None

Procedure

1. Launch the Microsoft Outlook application.
2. Select the email that you want to use to raise a request.
3. Select the add-in, then select the button or menu item for your request.

   Example
   For example, select the ServiceNow Add-in for Microsoft 365, then select **Create incident**.
   You might have to login to the Employee Center with your ServiceNow credentials.
   The Employee Center portal opens in the activity tab in Microsoft Outlook.
4. Fill in the form or the catalog item request, then select **Submit**.

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ServiceNow Add-in for Microsoft 365 reference

Reference topics provide information about the lists and forms used in the ServiceNow Add-in for Microsoft 365 application.

Components installed with ServiceNow Add-in for Microsoft 365

Several types of components are installed with activation of the plugin, including tables, user roles, and scheduled jobs.

Roles installed

Roles installed with ServiceNow Add-in for Microsoft 365

Role title [name]	Description	Contains roles
Outlook add-in setup manager [sn_outlook_addin.outlook_addin_setup]	Configures the ServiceNow Add-in for Microsoft 365, maps email fields to catalog items or forms.	None

Tables installed

Tables installed with ServiceNow Add-in for Microsoft 365

Table	Description
Catalog Mapping Configurations [sn_office_catalog_mapping_config]	Contains configurations for catalog items to map the catalog fields to email fields. This is a domain-separated list.
Form Mapping Configurations [sn_office_form_mapping_config]	Contains configurations for forms to map the form fields to email fields. This is a domain-separated list.
Office Mailbox to Catalog Field Mappings [sn_office_mailbox_catalog_field_mapping]	Contains information about the catalog fields that are mapped to email fields.
Office Mailbox to Form Field Mappings [sn_office_mailbox_form_field_mapping]	Contains information about the form fields that are mapped to email fields.
Office Manifest [sn_office_manifest]	Contains information about the manifest files created for different add-ins.
Office Control [sn_office_control]	Contains information about the office controls, like buttons or menus, created for different add-ins.

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Office Manifest form

The Office Manifest form helps you configure a manifest file for the ServiceNow Add-in for Microsoft 365.

Office Manifest form

Field	Description
Add-In Name	Name of the add-in that you want to create the manifest for.
Description	Description of the add-in that you want to create.
Plugin ID	Auto-generated identifier for the add-in.
Office Application	Microsoft Application that you want to create the add-in for.
Active	Option to activate the add-in.
Permission	API permissions for the add-in.
Icon URL	HTTPS or relative URL for the add-in icon.
Version	Version number of the add-in file.
Login Page not Required	Option to disable the login page for the add-in. If you select this option, you must add a list of domains that are allowed to access the add-in.
Auto Open Add-in	Option to automatically open the add-in when the app is launched. This field is available only when **Word** or **PowerPoint** is selected in the **Office Application** field.
Allowed Domains	List of domains that are allowed to access the add-in. This field is available only when the **Login Page not Required** field is selected.

Note: You can configure single sign-on (SSO) for your add-in by selecting the **Login Page not Required** field and providing the SSO domain in the **Allowed Domains** field.

Office Control form

The Office Control form helps you create a button, menu, or menu item for the ServiceNow Add-in for Microsoft 365.

Office Control form

Field	Description
Label	Label of the office control that is displayed on the add-in.

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Office Control form (continued)

Field	Description
Description	Description of the office control displayed on the add-in.
Type	Type of office control that you want to create.
Action	Action taken when the office control is selected. This field is available only when **Button** or **MenuItem** is selected in the **Type** field.
Relative URL	Relative URL that opens when the user selects the office control. This field is available only when **Open URL** is selected in the **Action** field.
Catalog	Catalog that opens when the user selects the office control. This field is available only when **Open Catalog** is selected in the **Action** field.
Table	Table for the new record that is created when the user submits a form. This field is available only when **Open Form** is selected in the **Action** field.
Parent Control	Parent menu that you want to add the item to. This field is available only when **MenuItem** is selected in the **Type** field.
Manifest	Manifest record that the office control is linked to.
Active	Option to activate the record.
Extension Point Type	Extension point for the office control. This field is available only when **Button** or **Menu** is selected in the **Type** field. **Note:** Menu items will have the same extension point as the parent menu record. This field has the following options: • MessageReadCommandSurface: Adds a button in the mail read view • MessageComposeCommandSurface: Adds a button in the mail compose form

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Office Control form (continued)

Field	Description
	• AppointmentOrganizerCommandSurface: Adds a button on the ribbon for the meeting organizer • AppointmentAttendeeCommandSurface: Adds a button on the ribbon for the meeting attendee • PrimaryCommandSurface: Adds a tab to the ribbon in the Office app. This option is available only when the manifest is created for Microsoft Word or Microsoft PowerPoint For more information about extension points, see ExtensionPoint element in the Microsoft documentation.
Icons	Section that requires HTTPS or relative URLs for the office control icons.

Catalog Mapping Configurations form

The Catalog Mapping Configurations form helps you customize mapping of emails and catalog items.

Catalog Mapping Configurations form

Field	Description
Catalog item	Catalog item that you want to map the email fields to.
Application	Application scope of the mapping configuration. This field is automatically set to the application scope of your instance.
Domain	Domain that you want to create the mapping configuration in.
UI script parser	UI script that contains custom logic for the mapping configuration.
Active	Option to activate the mapping configuration record.

Form Mapping Configurations form

The Form Mapping Configurations form helps you customize mapping of emails and forms.

Form Mapping Configurations form

Field	Description
Table	Table that you want to map the email fields to.

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Form Mapping Configurations form (continued)

Field	Description
Application	Application scope of the mapping configuration. This field is automatically set to the application scope of your instance.
Domain	Domain that you want to create the mapping configuration in.
Form View	Form view that you want to display when the user opens the form in the add-in.
UI script parser	UI script that contains custom logic for the mapping configuration.
Active	Option to activate the mapping configuration record.

Office Mailbox to Catalog Field Mappings form

The Office Mailbox to Catalog Field Mappings form helps you map an email field to a catalog item field.

Office Mailbox to Catalog Field Mappings form

Field	Description
Catalog item	Catalog item that the email fields must be mapped to. This field is automatically set to the Catalog item selected for the mapping configuration record.
Application	Application scope of the record. This field is automatically set to the application scope of your instance.
Catalog item field	Catalog item field that must be mapped to the email field.
Mailbox item property	Email field that must be mapped to the catalog item field.
Active	Option to activate the record.

Office Mailbox to Form Field Mappings form

The Office Mailbox to Form Field Mappings form helps you map an email field to a form field.

Office Mailbox to Form Field Mappings form

Field	Description
Table	Table that the email field must be mapped to.

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Office Mailbox to Form Field Mappings form (continued)

Field	Description
	This field is automatically set to the Table selected for the mapping configuration record.
Application	Application scope of the record. This field is automatically set to the application scope of the mapping configuration record.
Form field	Form field that must be mapped to the email field.
Mailbox item property	Email field that must be mapped to the form field.
Active	Option to activate the record.

ServiceNow for Microsoft Outlook

The ServiceNow integrations with Microsoft Outlook help you create a better, more connected experience for users. Employees get seamless self-service without having to leave the Outlook client, and agents can resolve cases faster.

ServiceNow for Microsoft Outlook Overview

ServiceNow for Microsoft Outlook leverages the Outlook Actionable Messages plugin to provide the following features:

- Employees and agents receive notifications about request submissions, updates, and completion, making it easier to track, plan, and collaborate on issues.
- Managers and approvers receive summaries and detailed reports for approval requests with actionable messages to approve or reject requests.
- Employees can provide feedback about their experience using the feedback card embedded in the emails.
- Employees can take surveys about their experience using the survey card embedded in the emails.

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Get started

Configure	Use	Reference
		
Provide employees with seamless self-service without leaving the Outlook client.	View reports, approve requests, and provide feedback from within email messages.	Information about lists and forms used to configure Outlook Actionable Messages.

Warning: After Microsoft retired External Access Token (EAT) authentication for Outlook Actionable Messages on March 31, 2026, actionable messages that rely on EAT will stop working. To ensure uninterrupted functionality with actionable message, you must migrate to Microsoft Entra ID token authentication and update the Outlook Actionable Messages app registration in your ServiceNow instance. Refer to Update Outlook Actionable Messages authentication to Microsoft Entra ID.

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Configuring ServiceNow for Microsoft Outlook

Configure ServiceNow for Microsoft Outlook to provide employees with seamless self-service without leaving the Outlook client.

Configuration overview

The following table lists the tasks required to configure ServiceNow for Microsoft Outlook.

Configuration tasks

Task	Description
Configure system properties to update the survey question limit	Update the question limit for a survey displayed in Microsoft Outlook.

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Configure system properties to update the survey question limit

Configure system properties to update the question limit for a survey to be displayed in Microsoft Outlook.

Before you begin
Role required: admin (OR) oam_admin

About this task
The *sn_ms_oam.feedback_survey_question_count* system property controls the behavior of the survey card that is rendered in email messages on Microsoft Outlook. If the number of questions exceeds the value of this property, the survey opens on the portal specified in the *sn_ms_oam.portal.suffix* property.

Procedure
1. Navigate to the **All** menu and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.
2. In the **Name** column, search for `sn_ms_oam.feedback_survey_question_count`.
3. Select the *sn_ms_oam.feedback_survey_question_count* property.
4. Update the **Value** field with the number that you want to set as the survey question limit.
   The default value of the property is **2**.
5. Select **Update**.

Using ServiceNow for Microsoft Outlook

Use the ServiceNow integration with Microsoft Outlook to view reports, approve requests, and provide feedback from within email messages.

Concur expense reports

View Concur expense reports from approval notifications in email messages. Approve or reject expense reports without leaving the Microsoft Outlook application.

Feedback and surveys

Submit feedback or take a survey about your experience by using actionable cards embedded in email notifications.

Manage approvals from a Microsoft Outlook email

Approve or reject Concur expense reports from a Microsoft Outlook email message.

Before you begin
The Approvals hub integration with SAP Concur (sn_ex_cnc) plugin must be installed.

Role required: approver_user

Procedure
1. Launch the Microsoft Outlook application.
2. Open the Concur Pending Approval Report email message.
3. **Optional:** View expenses and receipt items by selecting **Expenses and receipts**.
   A maximum of 12 expense items are displayed in the report. To view all items, select **View full report**.
4. Approve or reject the report.

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Note: You cannot accept or reject a report if the assigned approver has been modified or the report has been updated or closed.

Decision	Action
Approve the report	Select **Approve**.
Reject the report	**a.** Select **Send back**. **b.** Enter a reason for rejecting the report.

Submit feedback from a Microsoft Outlook email message

Submit feedback about a service request or your experience using the feedback card in a Microsoft Outlook email message.

Before you begin

To enable the feedback card, the `include_feedback_actionable` script must be added to the email notification and a feedback definition must be created for the required workflow.

For information about experience feedback, see Integrated experience and service feedback.

Note: The feedback card only appears at the top of the email message.

Role required: None

Procedure

1. Launch the Microsoft Outlook application.
2. Open an email message and select **Give Feedback**.
3. On the feedback card, select a rating based on your experience.
4. **Optional:** Enter additional feedback in the text box.
5. **Optional:** Make the feedback anonymous by selecting **Do not share my personal info**.
6. Select **Submit**.

Submit a survey from an email message

Submit a survey about your experience using the feedback card in a Microsoft Outlook email message.

Before you begin

To enable a survey in the email channel, the email notification and the survey must be selected in the feedback definition for the required workflow.

For information about experience feedback, see Integrated experience and service feedback.

Note: The survey card only appears at the top of the email message.

Role required: None

Procedure

1. Launch the Microsoft Outlook application.
2. Open an email message and select **Get Started**.

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Note: Surveys that are longer than the limit set by the admin are opened on the portal specified by the admin.

3. On the actionable card, enter text or select appropriate options based on the survey questions.
4. Select **Submit**.

Update Outlook Actionable Messages authentication to Microsoft Entra ID

Microsoft will retire External Access Token (EAT) authentication for Outlook Actionable Messages on March 31, 2026. Microsoft Entra ID token authentication is required for Outlook Actionable Messages.

Before you begin

Role required: admin

About this task

Warning: After Microsoft retired External Access Token (EAT) authentication for Outlook Actionable Messages on March 31, 2026, actionable messages that rely on EAT will stop working.

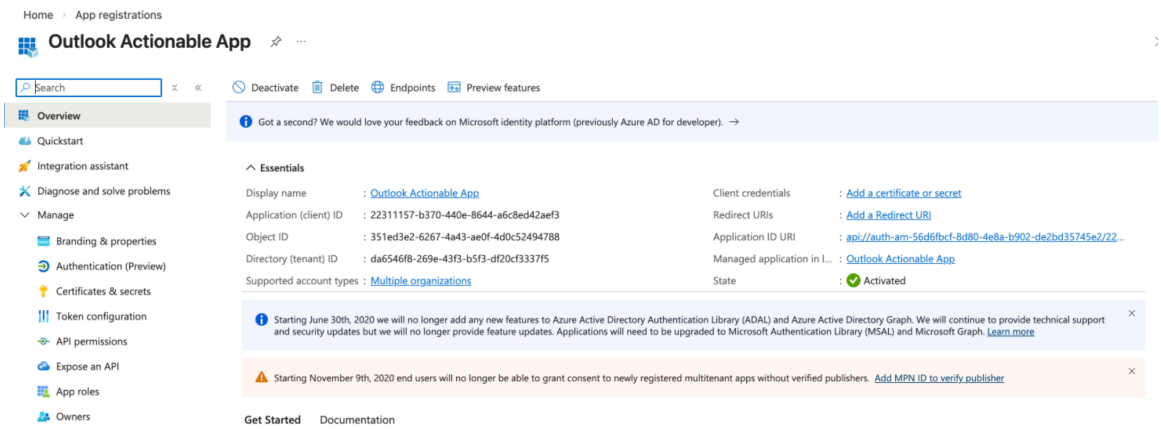
To ensure uninterrupted functionality with actionable message, you must migrate to Microsoft Entra ID token authentication and update the Outlook Actionable Messages app registration in your ServiceNow instance.

Procedure

1. Complete the Microsoft Entra ID setup for Actionable Messages.
   For more information, refer to Enabling AAD token of Actionable Messages.

   Important: If you already have an AM provider with Microsoft, migrate and regenerate the AM provider ID. If you do not have one, generate a new provider ID.

2. After completing the setup, copy the **App ID Uri** and the **Provider Id (originator)**.



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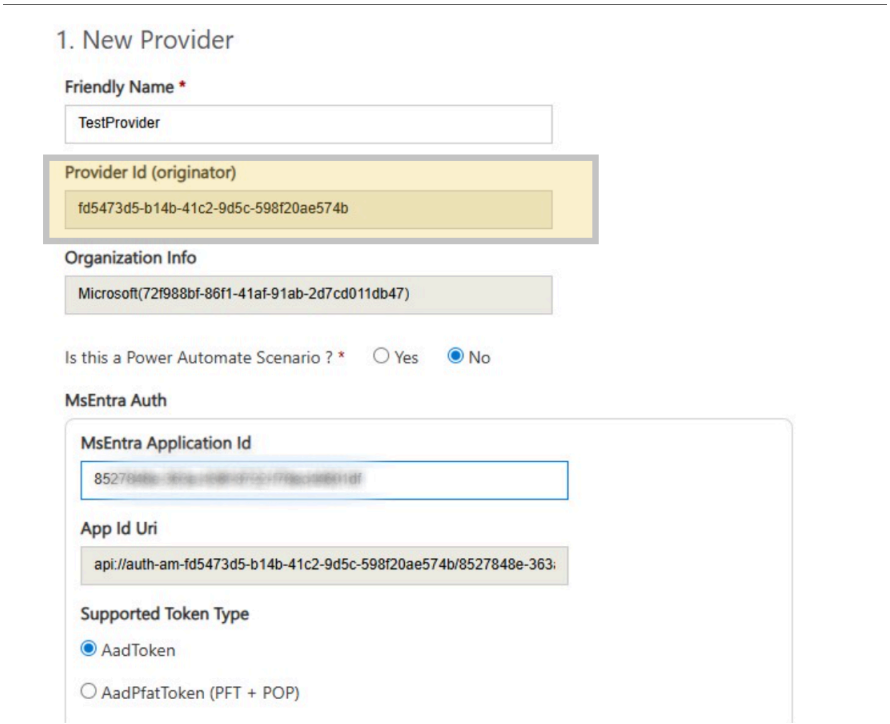
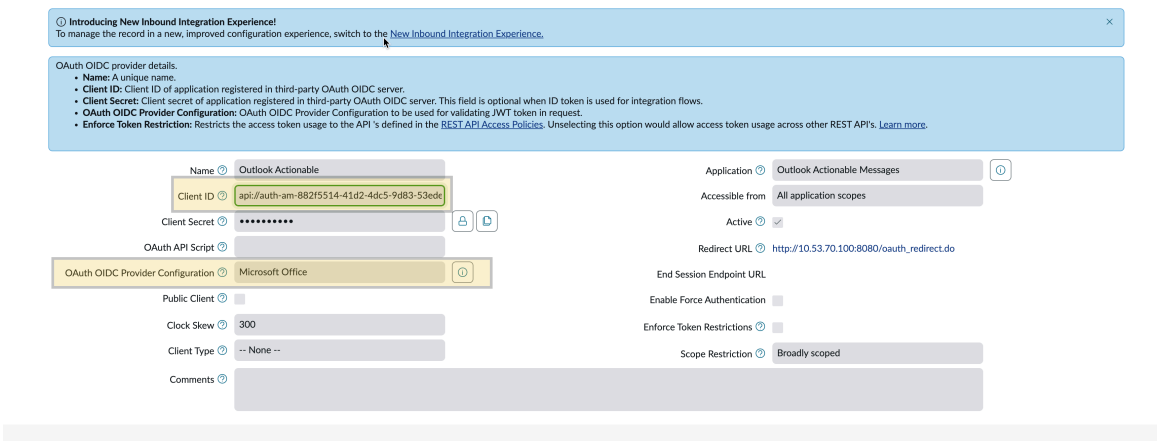


3. On your ServiceNow instance, update the *sn_ms_oam.outlookactionable.originator* System property value with the new **Provider Id (originator)** copied from Step 2.
4. Navigate to **All** > **System OAuth** > **Application Registry**.
5. Select **Outlook Actionable**.
6. On the form, in the **Client ID** field, update the ID with the **App ID Uri** that you copied in Step 2.
7. In the **OAuth OIDC Provider Configuration** field, open the **Microsoft Office** record.
   On the Microsoft Office OIDC Provider Configuration form, do the following:



   a. Update the **OIDC Metadata URL** to this format: `https://sts.windows.net/{tenant-id}/.well-known/openid-configuration`.

   b. Set the **User Claim** field to **upn**.

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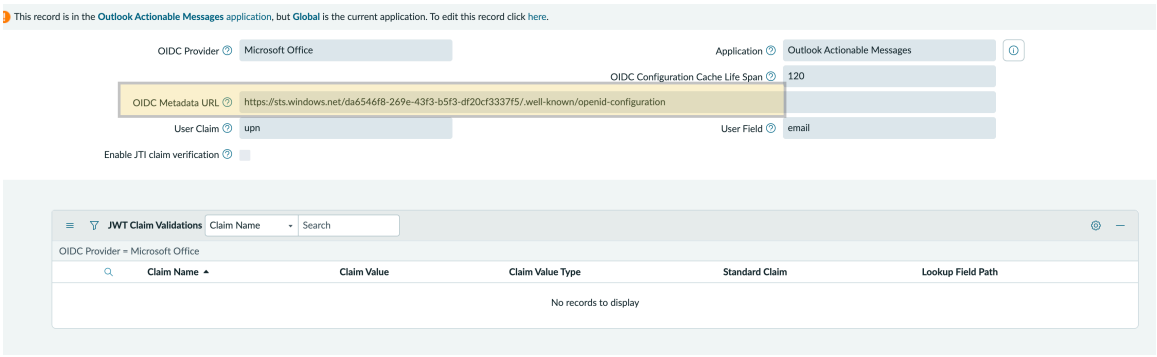

c. Save the form.

8. Save the form.

Result
You are now migrated to Microsoft Entra ID token authentication and the Outlook Actionable Messages app registration is updated in your ServiceNow instance.

ServiceNow for Microsoft Outlook reference

Reference topics provide additional information about the lists and forms that you use to configure ServiceNow for Microsoft Outlook.

Properties installed with ServiceNow for Microsoft Outlook

The following properties are installed with the Outlook Actionable Messages plugin.

Note: The following properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for ServiceNow for Microsoft Outlook

Property	Description
sn_ms_oam.feedback_survey_question_count	Use this property to set a limit for the number of questions to be displayed on a survey card. If the number of questions exceeds this value, the survey opens in the portal specified by the *sn_ms_oam.portal.suffix* property. • Type: integer • Default value: 2
sn_ms_oam.portal.suffix	Use this property to set the portal in which the survey opens if the questions exceed the value of the *sn_ms_oam.feedback_survey_question_count* property. You must enter the URL suffix of the portal that you want to use. • Type: string • Default value: esc

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Outlook Actionable Messages compatibility for surveys

Survey definitions must be compatible with Outlook Actionable Messages (OAM) to display surveys in the Microsoft Outlook application.

Conditions for OAM compatibility

The survey definition must meet the following conditions to be compatible with OAM.

- Outlook Actionable Messages must be selected in the survey definition. For more information, see Modify a survey definition.
- The survey must be active and published.
- The survey must not contain image scale questions with other question types. For more information, see Survey question data types.
- The survey can only contain one image scale question.

Note: If the survey contains more questions than the value of the *sn_ms_oam.feedback_survey_question_count* system property, the survey opens on the portal specified in the *sn_ms_oam.portal.suffix* property. For more information, see Configure system properties to update the survey question limit.

ServiceNow for Microsoft Teams and Microsoft 365

The ServiceNow integrations with Microsoft Teams and Microsoft 365 help you to create a better, more connected experience for your users. It drives productivity for the entire enterprise because employees get seamless self-service and agents can resolve their cases faster.

Important:

- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

ServiceNow for Microsoft Teams extends the Now Virtual Agent (VA) integration with Microsoft Teams to enable employees effectively request and receive service from within Microsoft Teams.

ServiceNow for Microsoft 365

With ServiceNow for Microsoft 365, Employee Center is available in Microsoft Outlook and the Microsoft 365 app, in addition to Microsoft Teams.

Features of ServiceNow for Microsoft 365

Objective	Requirements	Capabilities included
Enhance Employee Experience by integrating ServiceNow with Microsoft Teams and Microsoft 365	• IT Service Management Pro, or • IT Service Management Standard	• Enables employees to view and take action on actionable notifications. • Access all Virtual Agent capabilities directly via Microsoft Teams.

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Features of ServiceNow for Microsoft 365 (continued)

Objective	Requirements	Capabilities included
	To implement IT Service Management integration with Microsoft Teams, see IT Service Management integration with Microsoft Teams and Microsoft 365.	• Embed Employee Center within Microsoft Teams. Employees can access the portal by staying within Microsoft Teams.
	HR Service Delivery Pro for full Virtual Agent To implement HR Service Delivery integration with Microsoft Teams, see HR Service Delivery integration with Microsoft Teams and Microsoft 365.	• Enable employees to view and take action on actionable notifications. • Access all Virtual Agent capabilities directly via Microsoft Teams. • Embed Employee Center within Microsoft Teams. Employees can access the portal by staying within Microsoft Teams.
	For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.	Provides users with direct access to Employee Center in Microsoft Teams, Outlook, and Microsoft 365. **Note:** These steps are available only for Employee Experience with the following: • IT Service Management for Microsoft 365 • HR Service Delivery for Microsoft 365

ServiceNow for Microsoft Teams

ServiceNow for Microsoft Teams integration offers the following integrations for various use cases.

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Features of ServiceNow for Microsoft Teams

Objective	Requirements	Capabilities included
Use ServiceNow Virtual Agent with Microsoft Teams	• IT Service Management Pro, or • IT Service Management Standard, or • HR Service Delivery Pro for full Virtual Agent To implement ServiceNow Virtual Agent with Microsoft Teams, see Conversational Integration with Microsoft Teams.	• Enable ServiceNow Virtual Agent on Microsoft Teams. • Supports Virtual Agent features, such as Virtual Agent designer controls for creating conversations, notifications, and AI search results.
Enhance Agent Experience by integrating Major incident Management workbench with Microsoft Teams	• Notify plugin • Major Incident Management • Chat to Call To implement the Notify connector for Microsoft Teams, see Notify connector for Microsoft Teams. To implement Meeting Extensions with Microsoft Teams, see Meeting Extensions for Microsoft Teams.	• Provides agents the ability to initiate a Microsoft Teams chat with an employee from a ticket and then import the chat transcript back to the ticket as a comment. • Enables agents to work and manage the major incidents from the Major Incident Management (MIM) workbench through Microsoft Teams.
Enhance Employee and Agent experience by integrating ServiceNow with Microsoft Teams for Government Community Cloud - High (GCC-H) and US Department of Defense (DoD)	To integrate ServiceNow with Microsoft Teams for Government Community Cloud - High (GCC-H) or US Department of Defense (DoD), see Integrating ServiceNow with Microsoft Teams for GCC-H or DoD.	• Provides users the ability to install Employee Center with Microsoft Teams for GCC-H or DoD. • Install Employee Center and Virtual Agent with Microsoft Teams for GCC-H or DoD. • Install request-based chat with Microsoft Teams for GCC-H or DoD.
Build Custom integrations	For more information, see Microsoft Teams Graph spoke, and Microsoft Teams Communications spoke.	Create custom integrations using Microsoft Teams Graph spoke and Microsoft Teams Communications Spoke.
Universal Request integrations	Universal Request	Enables employees to create universal requests directly

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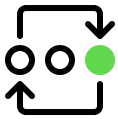
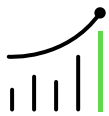
Features of ServiceNow for Microsoft Teams (continued)

Objective	Requirements	Capabilities included
	To implement Universal Request integration with Microsoft Teams, see Universal Request integration with Microsoft Teams.	from Microsoft Teams, via ServiceNow Virtual Agent.

Explore  Learn about how agents and employees use ServiceNow for Microsoft Teams.	Integrate  Plan and configure your implementation.	Configure  Extend Teams integrated capabilities with other applications.
Manage  Manage and customise Microsoft Teams chat messages.	**Use**  Use Microsoft integration with various applications.	Reference  See reusable reference content for Microsoft Teams integrations.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring ServiceNow for Microsoft 365

The ServiceNow® for Microsoft Teams or Microsoft 365 applications extend the integration of the application to different business units. You can enable employees to more effectively request and receive service from within Microsoft Teams by using this integration.

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ServiceNow for Microsoft Teams is available with IT Service Management, HR Service Delivery, Universal Request. It is also supported for various Agent experience platforms, like Meeting Extensions.

ServiceNow for Microsoft 365 is available with IT Service Management and HR Service Delivery.

Important:

- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

ServiceNow for Microsoft 365 integrations

ServiceNow for Microsoft 365 integration features are as follows:

- Allows agents and employees to collaborate to resolve a ticket.
- Enables agents to initiate a Microsoft Teams chat with an employee from a task record.
- Enables agents to import the Microsoft Teams chat transcript back to the task record as a comment.
- Enables employees with specific permissions to view Microsoft Teams chat from a task record.

Explore Microsoft Teams and Microsoft 365 integration for Employee Experience

Offers help for employees to resolve their IT, HR, and UR related issues through Microsoft Teams or Microsoft 365. Employees can interact with the agents from within Microsoft Teams or Microsoft 365 to resolve their issues.

Important:

- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

IT Service Management integration with Microsoft Teams and Microsoft 365

IT Service Management integration with Microsoft Teams extends the Now Virtual Agent integration with Microsoft Teams to enable employees to more effectively request and receive service from within Microsoft Teams.

Functionalities of the IT Service Management integration with Microsoft Teams

The IT Service Management integration with Microsoft Teams application includes the following additional capabilities:

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- Actionable notifications: For approval and comments on tickets. Users can reply on the notifications from within Microsoft Teams.
  - Approval – for Request (single Requested Item), Change Request
  - Ticket comments: Employees are able to respond to notifications on the tickets from within Microsoft Teams: Incident, Requested Item, and Change Request.
- Agents can initiate a Microsoft Teams chat with an employee from an incident, change request, or request item. Agents can then copy the chat transcript back to the ticket as a comment.
- Additional informational notifications for:
  - Incident: Resolved, Updated
  - Requested Item: Completed, Approved, Rejected, Updated
  - Approval (for all approvals other than Request (with a single requested item), and Change Request)

Note: Approvals with e-Signature are not yet supported for IT Service Management integration with Microsoft Teams.

Feature mapping

Feature	License Requirements
Actionable Notifications	ITSM Pro
Chat - Agent to Employee/Agent to Agent	ITSM Standard or above
Employee Center	ITSM Standard or above

Using the IT Service Management integration with Microsoft Teams

You must perform the following activities to integrate IT Service Management with Microsoft Teams in your ServiceNow instance:

1. Install IT Service Management integration with Microsoft Teams application
2. Setting up the ServiceNow instance for Microsoft Teams integration

To configure the IT Service Management integration with Microsoft Teams in your ServiceNow instance, see Configure IT Service Management integration with Microsoft Teams.

To manage the IT Service Management integration with Microsoft Teams in your ServiceNow instance, see Customize IT Service Management integration with ServiceNow.

To use the IT Service Management integration with Microsoft Teams in your ServiceNow instance, see Use ITSM and HRSD integrations with Microsoft Teams.

HR Service Delivery integration with Microsoft Teams and Microsoft 365

HR Service Delivery integration with Microsoft Teams extends the Now Virtual Agent integration with Microsoft Teams to enable employees to more effectively request and receive service from within Microsoft Teams.

The HR Service Delivery integration with Microsoft Teams application extends the Now Virtual Agent integration and includes the following additional capabilities:

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- Actionable notifications – for approval and comments on tickets. Users can take action on the notifications from within Microsoft Teams.

  Ticket comments: Employees are able to respond to notifications on the tickets from within Microsoft Teams.

  This `respond_to_comment_notification_inclusion_list_for_hr` property specifies the HR tables for which the **Respond to Comments** notification triggers. <HR services>

  - sn_hr_core_case_total_rewards
  - sn_hr_core_case_global_mobility
  - sn_hr_core_case_operations
  - sn_hr_core_case_performance
  - sn_hr_core_case_benefits
  - sn_hr_core_case_workforce_admin
  - sn_hr_core_case_talent_management
  - sn_hr_core_case_corporate_communication
  - sn_hr_core_case_payroll,
  - sn_hr_core_case_compensation.
- Provides agents the ability to initiate a Microsoft Teams chat with an employee from an HR case and then to copy the chat transcript back to the ticket as a comment.
  - sn_now_teams_hr.chat_sn_hr_core_case_fields

    This system property contains the list of HR Case table fields that will be shown as recommended participants for "Start Chat" feature. By default, the recommended participants contain the participants comprising of "opened_for", "subject_person", "collaborators" fields.

  - sn_now_teams_hr.chat_sn_hr_core_task_fields

    This system property contains the list of HR Task table fields that will be shown as recommended participants for "Start Chat" feature. By default, the recommended participants contain the participant defined in "assigned_to" field.

  - sn_now_teams_hr.hr_case_allow_list_for_teams_chat_actions

    This system property contains the list of HR Case tables for which "Start Chat" and "Import Messages" UI Action. By default, this list does not include highly sensitive HR Cases such as "Employee Relations", "Investigation", and "Ethics" cases.

  - sn_now_teams_hr.respond_to_comment_notification_inclusion_list_for_hr

    This system property contains the list of HR Case tables for which "Respond to Comment" actionable notifications will be sent. By default, this list does not include highly sensitive HR Cases such as "Employee Relations", "Investigation", and "Ethics" cases.

Note: Approvals for HR cases and Approvals with e-Signature are not yet supported for HR Service Delivery with Microsoft Teams.

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Feature mapping

Feature	License Requirements
Actionable Notifications	HR Pro or above
Chat - Agent to Employee/Agent to Agent	HR Pro or above
Employee Center	HR Standard or above

You must perform the following activities to integrate HR Service Delivery with Microsoft Teams in ServiceNow instance:

1. Install HR Service Delivery integration with Microsoft Teams application
2. Setting up the ServiceNow instance for Microsoft Teams integration

To configure HR Service Delivery integration with Microsoft Teams in ServiceNow instance, see Configure HR Service Delivery integration with Microsoft Teams.

To manage HR Service Delivery integration with Microsoft Teams in ServiceNow instance, see Customize HR Service Delivery integration with Microsoft Teams.

To use HR Service Delivery integration with Microsoft Teams in ServiceNow instance, see Use ITSM and HRSD integrations with Microsoft Teams.

Universal Request integration with Microsoft Teams

The ServiceNow® Universal Request integration with Microsoft Teams application extends the ServiceNow integration with Microsoft Teams. You can enable employees to more effectively request and receive service from within Microsoft Teams by using this application.

The Universal Request integration with Microsoft Teams includes the following capabilities:

- Agents and Employees can collaborate and discuss a universal request through Microsoft Teams.
- Agents can save the conversations in the activity stream of the related universal request as Additional comments or Worknotes.
- Employees can create universal requests through Microsoft Teams.
- Employees can track, update, or cancel their universal requests through Microsoft Teams.

The Universal Request integration with Microsoft Teams is available with the Universal Request Pro application.

For Universal Request integration with Microsoft Teams in ServiceNow instance, see Integrating ServiceNow with Microsoft Teams and Microsoft 365.

To configure Universal Request integration with Microsoft Teams in ServiceNow instance, see Configure Universal Request integration with Microsoft Teams.

To manage Universal Request integration with Microsoft Teams in ServiceNow instance, see Customize UI actions for Universal Request integration with Microsoft Teams.

To use Universal Request integration with Microsoft Teams in ServiceNow instance, see Use Microsoft Teams for Universal Request.

Explore Microsoft Teams integration for Agent Experience

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams.

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Notify connector for Microsoft Teams

Notify connector for Microsoft Teams enables you to manage and initiate a Microsoft Teams meeting directly from any record such as an incident, or a task.

Key Features

- Start and end Microsoft Teams meetings directly from any record such as an incident or a task or from the major incident workbench.
- Manage a Microsoft Teams meeting by adding or removing participants.

System Requirements

Install the ServiceNow IntegrationHub Installer (com.glide.hub.integrations) plugin to design the integration flows in the Flow Designer application. For more information, see Request IntegrationHub.

Next procedures

You must perform the following activities to integrate Notify connector for Microsoft Teams with ServiceNow:

1. Install Notify connector for Microsoft Teams
2. Setting up the ServiceNow instance for Microsoft Teams integration
   - Integrate Notify connector pre-published app with Microsoft Teams
   - Integrating Notify connector self-configured app with Microsoft Teams

To allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams, see Configure Notify connector for Microsoft Teams.

To use Notify connector for Microsoft Teams in ServiceNow instance, see Use Notify connector for Microsoft Teams.

Meeting Extensions for Microsoft Teams

The Meeting extensions for Microsoft Teams enables the major incident manager, and the participants to view the communication tasks from within Microsoft Teams during an active conference call.

The meeting extensions feature displays the incident details and the communication tasks from the major incident workbench.

The data on the **Incident details** tab and **Communication tasks** tab is updated automatically whenever the major incident is updated in ServiceNow®.

Next procedures

You must perform the following activities to integrate Meeting Extensions app in ServiceNow instance:

1. Ensure you have completed Notify connector for Microsoft Teams related procedures. For more information, see Notify connector for Microsoft Teams.
2. Install Meeting Extensions for Microsoft Teams
3. Setting up the ServiceNow instance for Microsoft Teams integration

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- Integrate Meeting Extensions pre-published app with Microsoft Teams
- Integrate Meeting Extensions self-configured app with Microsoft Teams

To use Meeting Extensions for Microsoft Teams with ServiceNow, see Use Microsoft Teams Meeting Extensions.

Integrating ServiceNow with Microsoft Teams and Microsoft 365

Set up your ServiceNow instance to integrate Microsoft Teams or Microsoft 365 applications.

Important:

- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

To connect your ServiceNow instance to your Microsoft Office 365 tenant and to authorize applications, you must have both the external_app_install_admin role and the application administrator role in Microsoft Office 365. For more information on Microsoft roles, see the Microsoft documentation on Azure AD built-in roles.

Azure Active Directory (Azure AD) organizes objects like users and apps into groups called tenants.

Self-configured apps (previously referred to as single-tenant) are available only in the tenant they were registered in, also known as their home tenant. Here, a single Microsoft Teams tenant is connected to multiple ServiceNow instances.

Pre-published apps (previously referred to as multi-tenant) are available to users in both their home tenants and other tenants. Here, a single Microsoft Teams tenant is connected to a single ServiceNow instance.

Choose between a self-configured app and a pre-published app configuration

Pre-published app	Self-configured app
• The relevant *Microsoft Azure* app is provided by *ServiceNow* so you don't need to create your own. No need to create an app in the *Microsoft Azure* portal. Moderate *Microsoft Azure* expertise is required. • Once the administrator consents, *ServiceNow* automatically updates the *Microsoft Azure* app.	• You must create your own app in the *Microsoft Azure* portal. Requires proficiency in *Microsoft Azure* portal. • Own and control the *Microsoft Azure* app.

When you consent to the app to use the required permissions, a Service Principal (SP) is created representing the *Microsoft Azure* app. For more information about the admin consent, see Understand user and admin consent.

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In a self-configured app configuration, you must create an app in *Microsoft Azure* portal and use the app ID and the client ID values to connect to your *ServiceNow* instance.

When to use Pre-published app or Self-configured app configuration

Use the self-configured app or pre-published app configuration based on the following conditions:

- In case of a single Microsoft tenant to multiple ServiceNow® instances integration, use the self-configured configuration setup.
- In case of a single Microsoft tenant to single ServiceNow® instance integration, it is recommend to use the pre-published configuration setup. However, you can still use the self-configured configuration setup.
- In case of a single ServiceNow® instance to multiple Microsoft tenant integration, use the Self-configured configuration setup.

Plan your installation

Identify the need and plan your installation for ServiceNow® for Microsoft Teams.

Install IT Service Management integration with Microsoft Teams application

Install the IT Service Management integration with Microsoft Teams application for the collaboration between the agents and employees.

Before you begin

Role required: admin

Note: If you install IT Service Management integration with Microsoft Teams app, you don't need to download Conversational Integration with Microsoft Teams separately.

Procedure

1. Navigate to **System Application** > **All Available Applications** > **All**.
2. In the search field, enter `IT Service Management for Microsoft 365`.
   You can search for the application by its name or ID. If you cannot find an application, visit the ServiceNow app store to view IT Service Management for Microsoft 365. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install** button.

   Note: All the dependent plug-ins are automatically installed in this process.

   You must also install the *fix_script_start_chat_field_decorator_IT* update set to have a field decorator in a ticket to initiate a chat with the requester.
4. Download the *fix_script_start_chat_field_decorator_IT* update set from the app store.

   If you can't find the fix script, click **Show more** to view the list of supporting links and docs.

   Click *fix_script_start_chat_field_decorator_IT* to download the XML file.

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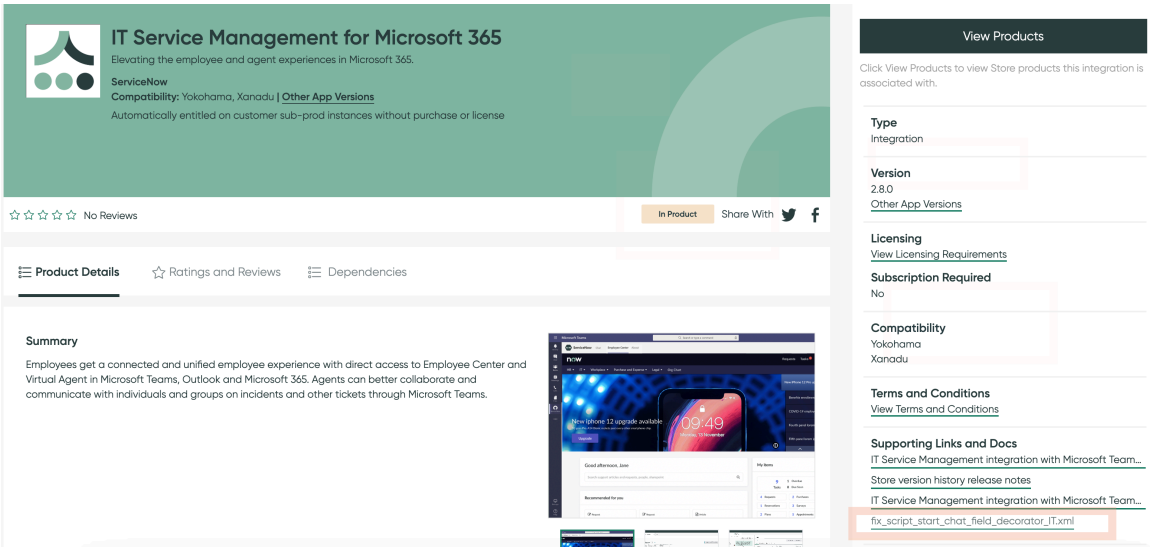
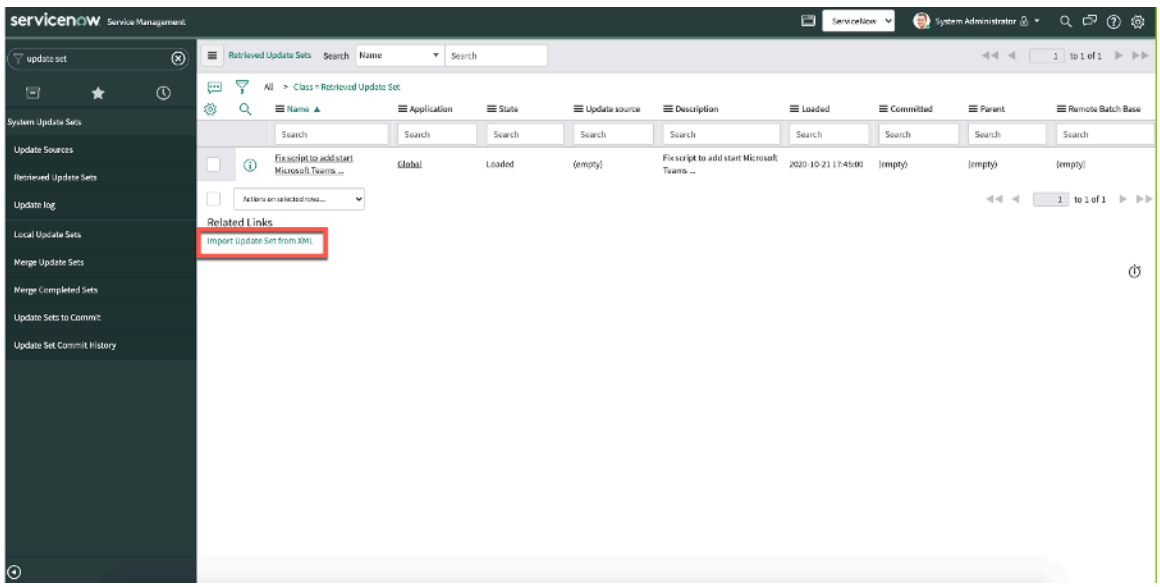


5. Navigate to **All** > **System Update Sets** > **Retrieved Update Sets** > **Related Links** > **Import Update Set from XML**.



6. In the XML file field, click **Choose file** button and select *fix_script_start_chat_field_decorator_IT* XML file and upload the XML file.
7. Click **Fix script to add start Microsoft Teams chat field decorator**.
8. Click **Preview Update Set**.

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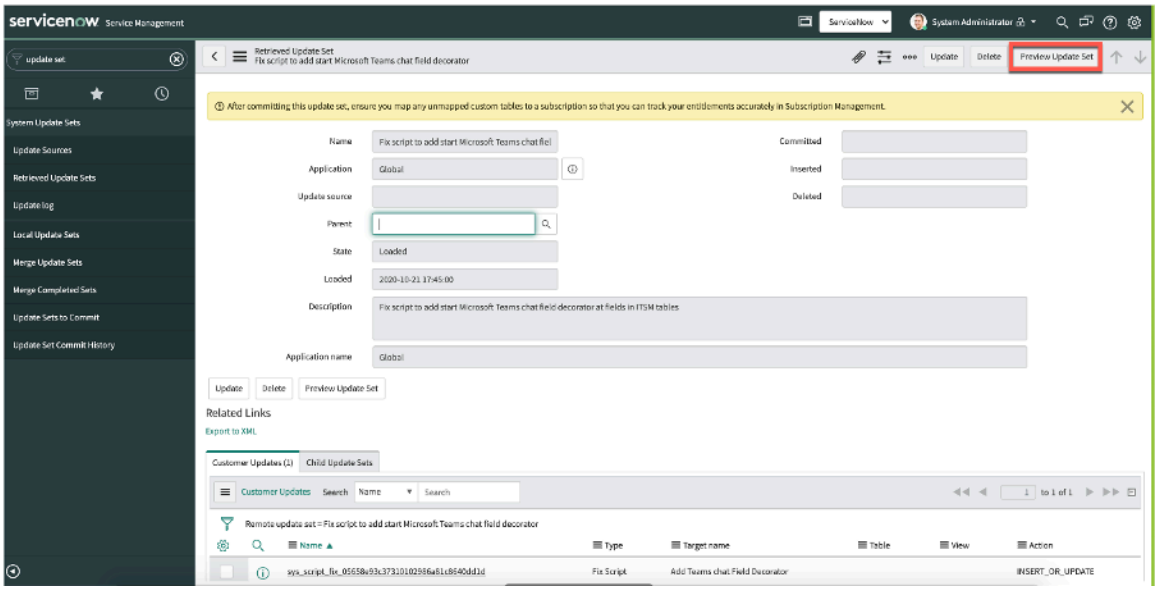
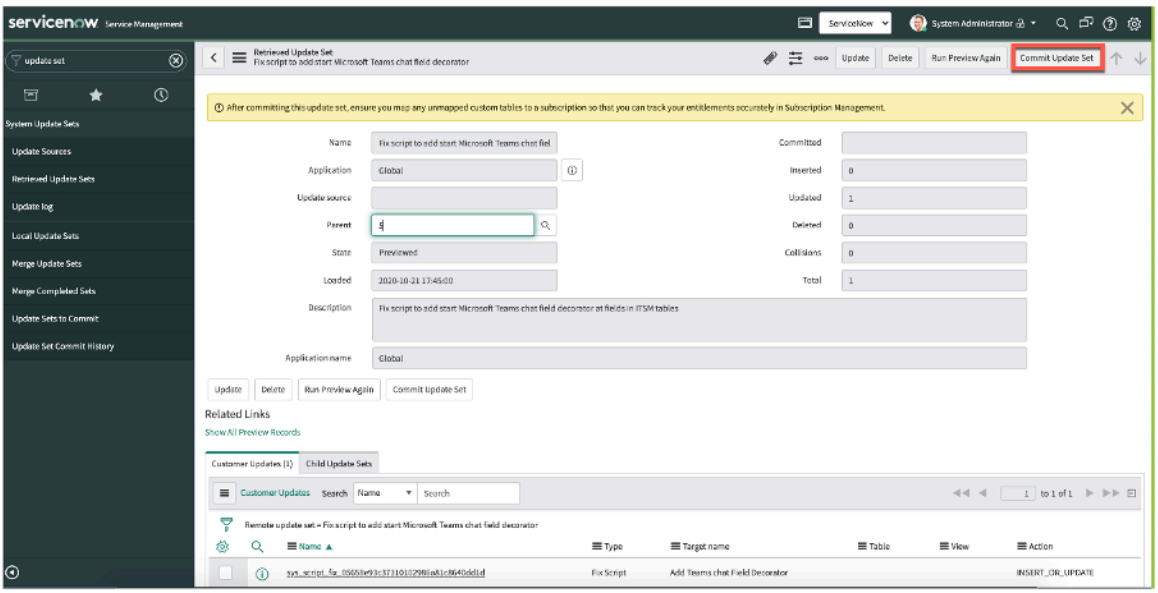


9. Click **Commit Update Set**.



The Fix script to add start Microsoft Teams chat field decorator will be in Committed state.

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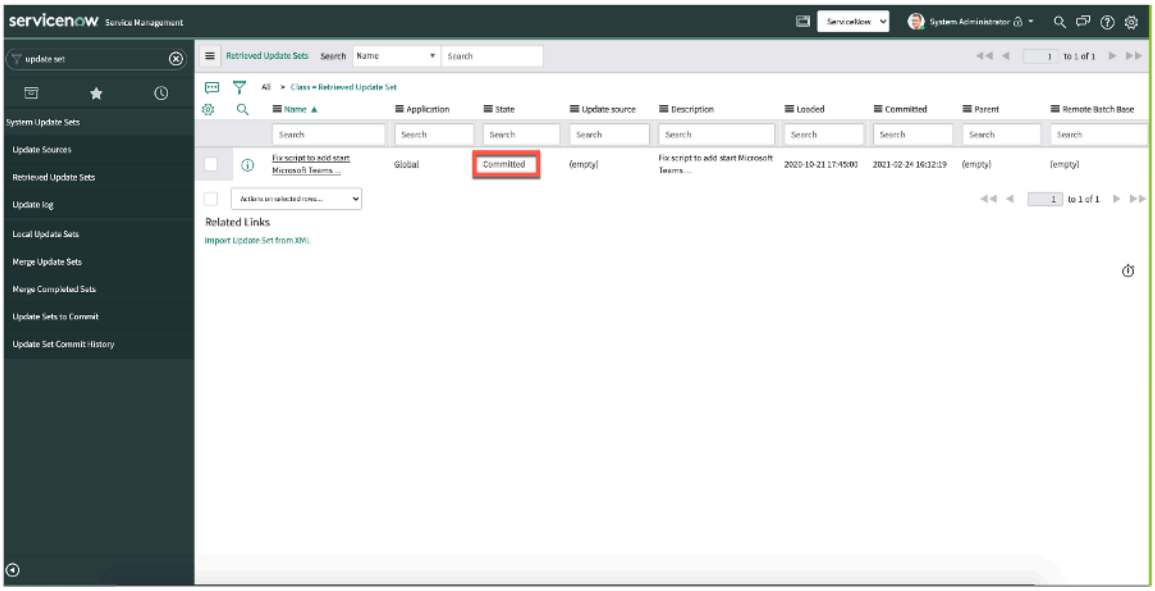

10. Navigate to **System Definition** > **Fix Scripts**.
11. In the **Name** search field, enter `Add Teams chat Field Decorator`.
12. Click **Add Teams chat Field Decorator** fix script.
13. Click **Run Fix Script** button.

The  icon is displayed as a field decorator in a record.

Install HR Service Delivery integration with Microsoft Teams application

Install the HR Service Delivery integration with Microsoft Teams application to integrate with ServiceNow instance for the collaboration between the agents and employees.

Before you begin

Role required: admin

Note: If you install HR Service Delivery integration with Microsoft Teams app, you don't need to download Conversational Integration with Microsoft Teams separately.

Procedure

1. Navigate to **System Application** > **All Available Applications** > **All**.
2. In the search field, enter `HR Service Delivery for Microsoft 365`.
   You can search for the application by its name or ID. If you cannot find an application, visit the ServiceNow app store to view HR Service Delivery for Microsoft 365. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.

Note: All the dependent plug-ins are automatically installed in this process.

What to do next

You must also install the following update sets from the app store for HR Service Delivery for Microsoft 365:

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- human_resources_integrations_rca_records
- human_resources_service_portal_rca_records
- human_resources_lifecycle_events_rca_records
- human_resources_core_rca_records
- content_automation_rca_records
- document_templates_rca_records.xml
- fix_script_start_chat_field_decorator_HR

All the Restricted Caller Access(RCA) privileges are displayed in **Application Restricted Caller Access Privileges** list.

Download and execute the *fix_script_start_chat_field_decorator_HR* to display the field decorator in the ticket to initiate a chat with the requester.

Verify Application Restricted Caller Access (RCA) Privileges

Verify that there are no duplicate entries in the Restricted Caller Access (RCA) records before uploading an RCA data set to fix the configuration issues.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access Privileges**.
2. In the **Source Scope** search, enter: `ServiceNow for Microsoft Teams`.
3. Right-click on **Source Scope** column header, and select **Group By Source Scope**.
4. Expand **ServiceNow for Microsoft Teams**, and **Collaboration Services** source scopes.
5. Delete all the entries under **ServiceNow for Microsoft Teams**, and **Collaboration Services** source scopes.

Import Update set from XML and install fix script

Import update set from XML to provide cross-scope access to HR Service Delivery applications and run fix script to display field decorator in the ticket.

Before you begin
Role required: admin

About this task
Following table depicts the RCA record mapping to its feature.

RCA record mapping

RCA Record	Plugin	Plugin Name
content_automation_rca_records.xml	{Content Automation}	[com.sn_content_automation]
document_templates_rca_records.xml	{Document Templates}	[com.snc.document_templates]
human_resources_core_rca_records.xml	{Human Resources Scoped App: Core}	[com.sn_hr_core]
human_resources_integrations_rca_records.xml	{Human Resources Scoped App: Integrations}	[com.sn_hr_integrations]

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RCA record mapping (continued)

RCA Record	Plugin	Plugin Name
human_resources_lifecycle_events_rca.xml	{Human Resources Scoped App: Lifecycle Events}	[com.sn_hr_lifecycle_events]
human_resources_service_portal_rca.xml	{Employee Center}	[com.sn_hr_service_portal]
human_resources_workspace_rca.xml	{Human Resources Scoped App: Workspace}	[com.sn_hr_agent_workspace]

For more information about the Update sets, see Update set transfers.

Procedure

1. Download the update sets from the app store for HR Service Delivery integration with Microsoft Teams.

   If you can't find the XML files, click **Show more** to view the list of supporting links and docs.

2. Click each of the XML files to download on to your computer.

   - human_resources_integrations_rca_records
   - human_resources_service_portal_rca_records
   - human_resources_lifecycle_events_rca_records
   - human_resources_core_rca_records
   - content_automation_rca_records
   - document_templates_rca_records.xml
   - fix_script_start_chat_field_decorator_HR
   - human_resources_workspace_rca.xml

3. Navigate to upload XML files.
   - Navigate to **All** > **System Update Sets** > **Local Update Sets** for the RCA script XML uploads.
   - Navigate to **All** > **System Update Sets** > **Retrieved Update Sets** for the fix script XML upload.
4. Right-click on the **Name** column header and select **Import XML** menu.
5. Select **Browse** on the Import XML form and select the update set XML file.
6. Select **Upload**.
7. Select the XML file by its name on the Retrieved Update Sets form for RCA script type and Local Update Sets form for fix script type.
8. Select **Preview Update Set**.
9. Select **Commit Update Set**.

   The XML scripts will be in Committed state.

Result

The RCA and fix script XMLs are uploaded.

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Install Fix Script for HR Service Delivery integration with Microsoft Teams

Run the *fix_script_start_chat_field_decorator_HR* in the ServiceNow instance to display **Start Microsoft Teams chat** field decorator in the ticket to initiate a chat with the requester.

Before you begin

Role required: admin

Procedure

1. Navigate to **System Definition** > **Fix Scripts**.
2. Enter `Add Teams chat Field Decorator` in the **Name** column search.
3. Select **Add Teams chat Field Decorator** fix script.
4. Select **Active** check box.
5. Select **Run Fix Script**.

The  icon is displayed as a field decorator in a record.

Install Universal Request integration with Microsoft Teams application

Install the Universal Request integration with Microsoft Teams application (sn_uni_req_msteams). You can initiate Microsoft Teams conversations within your ServiceNow instance by using this application. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Universal Request integration with Microsoft Teams requires the following plugin. Ensure that the plugin is activated before you install Universal Request integration with Microsoft Teams.

  Required ServiceNow plugins

  Universal Request: Virtual Agent Conversations (com.snc.universal_request.va)

  The Universal Request Virtual agent conversations plugin is required for the Virtual Agent functionalities to be activated.

- Universal Request integration with Microsoft Teams requires the following ServiceNow Store application. Ensure that the application is installed before you install Universal Request integration with Microsoft Teams.

  Required ServiceNow Store applications

  ServiceNow for Microsoft Teams (sn_now_teams)

  The ServiceNow for Microsoft Teams store application must be activated for the Universal Request integration with Microsoft Teams application to function.

Role required: admin

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About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Universal Request integration with Microsoft Teams application (sn_uni_req_msteams) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Universal Request integration with Microsoft Teams.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Approve application restricted caller access privileges

Approve restricted caller access (RCA) privileges in the target scope so that you can provide scope access privileges. Approving the RCA privileges enables the script includes in Universal Request scope to be accessed from the Universal Request integration with Microsoft Teams scope.

Before you begin
Role required: admin

About this task
RCA privileges define cross-scope access to an application, an event, or an application resource. Application resources include access control roles, business rules, UI actions, and script includes. RCA privileges can also be used to allow or deny requests for access. Restricted caller access [sys_restricted_caller_access] records track cross-scope applications or scripts that request access to an application, application resource, or event. For more information, see Requested restricted caller access (RCA).

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access** > **Restricted Caller Access Privileges**.
2. In the **Source Scope** search, enter `Universal Request integration with Microsoft Teams`.
3. Right-click on **Source Scope** column header, and select **Group By Source Scope**.
4. Expand the **Universal Request integration with Microsoft Teams** source scope.
5. Open the record.

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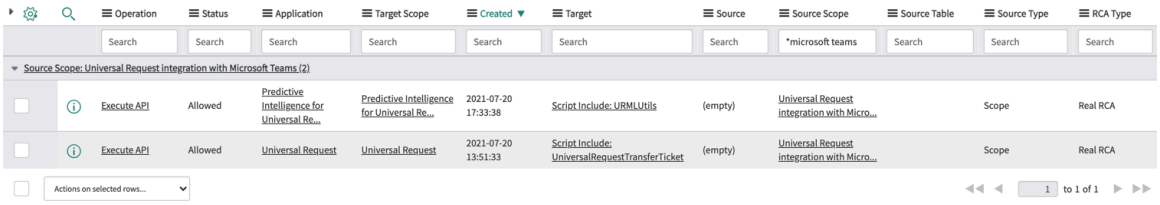
6. Change the **Status** to **Allowed**.
7. Click **Update**.

Result

The RCA is approved. The records get updated as shown in the following figure. The **Application** column and the **Target Scope** column now have the same values, and the **Status** column changes to **Allowed**.



Install Notify connector for Microsoft Teams

Install and activate the Notify connector for Microsoft Teams plugin to be able to initiate a Microsoft Teams meeting directly from a Task record or via the Major Incident Workbench.

Before you begin

Ensure you have installed the following plugins on your ServiceNow instance.

- Notify plugin `com.snc.notify`.
- Microsoft Teams Communications spoke plugin `sn_msteams_com_spk`.
- Azure Active Directory User Mapping plugin `sn_now_azure`.

For more information about Microsoft Teams Communications spoke, see Microsoft Teams Communications spoke.

For more information about Notify, see Notify.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Enter `Notify Connector for Microsoft Teams` or `sn_notify_msteams` in the search field.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests on the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Select **Install**.

What to do next

Integrate Notify connector for Microsoft Teams in ServiceNow instance.

- To set up pre-published app (Single Microsoft Teams tenant to single ServiceNow instance), see Integrate Notify connector pre-published app with Microsoft Teams.
- To set up self-configured app (Single Microsoft Teams tenant to multiple ServiceNow instance), see Integrating Notify connector self-configured app with Microsoft Teams.

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Install Meeting Extensions for Microsoft Teams

Install and activate the Meeting Extensions for Microsoft Teams plugin to be able to initiate a Microsoft Teams meeting directly from an Incident record.

Before you begin

Ensure you have installed Notify connector for Microsoft Teams. For more information, see Install Notify connector for Microsoft Teams.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Enter `Meeting Extensions for Microsoft Teams` or `sn_now_teams_ext` in the search field.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests on the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Select **Install**.

What to do next

Integrate Meeting Extensions for Microsoft Teams with ServiceNow.

- To set up pre-published app (Single Microsoft Teams tenant to single ServiceNow instance), see Integrate Meeting Extensions pre-published app with Microsoft Teams.
- To set up self-configured app (Single Microsoft Teams tenant to multiple ServiceNow instance), see Integrate Meeting Extensions self-configured app with Microsoft Teams.

Setting up the ServiceNow instance for Microsoft Teams integration

Set up your ServiceNow® instance for the Microsoft Teams integrations.

When to use Pre-published app or Self-configured app configuration

Use the self-configured app or pre-published app configuration based on the following conditions:

- In case of a single Microsoft tenant to multiple ServiceNow® instances integration, use the self-configured configuration setup.
- In case of a single Microsoft tenant to single ServiceNow® instance integration, it is recommend to use the pre-published configuration setup. However, you can still use the self-configured configuration setup.
- In case of a single ServiceNow® instance to multiple Microsoft tenant integration, use the Self-configured configuration setup.

For best practices and guidelines, refer to the Knowledge base article: https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1586849.

Setup for integrating pre-published apps with Microsoft Teams

Prepare your environment to set up and configure your ServiceNow instance for Microsoft Teams integrations using the pre-published app configuration.

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Setup for integrating pre-published apps with Microsoft Teams for Employee Experience

Set up pre-published apps to integrate with IT, HR, and Universal Request through Microsoft Teams. Employees can interact with the agents from within Microsoft Teams to resolve their issues.

Connect your ServiceNow instance to your Microsoft Teams tenant

Connect your ServiceNow instance to your Microsoft Teams tenant to enable users to create their requests from within Microsoft Teams.

Before you begin

Note: The following steps are for pre-published apps. Your Azure apps must already be registered and published to follow this configuration.

Role required: External admin (external_app_install_admin)

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.
2. Select **Install**.

   This step connects your tenant to the ServiceNow instance.
3. Select the#**Consent on behalf of your organization** option to provide the consent/permissions for all your users, then select#**Accept** to provide the admin consent.
   These permissions enable the app to do the following:
   - Maintain access to data that you have given access to
   - Sign in and read user profiles
   - Sent a teamwork activity to any user

   When the apps are successfully installed, the page displays the details of the tenant and available Azure Apps to authorize.

Grant permissions to required Microsoft Azure apps

Authorize the required pre-published apps to enable your ServiceNow instance to make API calls to Microsoft Azure to enable ServiceNow for Teams application workflows.

Before you begin

Install Virtual Agent Lite or Virtual Agent. For more information see Virtual Agent integration with messaging apps.

To connect your ServiceNow instance to your Microsoft 365 tenant and to authorize apps, you must have both the external_app_install_admin role and the Global Administrator role in Microsoft 365. For information about the related Microsoft roles, see Azure AD built-in roles.

Role required: External admin (external_app_install_admin). This role is installed on the base system as part of the installation of the Channel Proxy plugin.

About this task

The ServiceNow for Teams pre-published apps are:

- Notify Connector: Install Notify Connector for Microsoft Teams to enable the chat to call feature. For more information, see Notify connector for Microsoft Teams.
- Request-based Chats
- SSO and Activity Notifications

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Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.
2. Authorize the relevant app.

   a. Click **Authorize** in the row of the app entry.

   b. Provide the admin consent by selecting **Accept**.

      For information on API permissions used in ServiceNow for Microsoft Teams integration, refer ServiceNow for Microsoft Teams integration API permissions for Request-based chat and SSO.

   Upon successful authorization, a green check mark appears next to the app name and the **Authorize** button changes to **Installed**.

What to do next

If the upn is different from email ID in your environment, go to Enable connecting to meetings from Microsoft Teams. If the upn is same as the email ID, go to Create and download the manifest file for pre-published apps.

Enable connecting to meetings from Microsoft Teams

Create the OIDC provider configuration record that enables users to connect to meetings in the Microsoft Teams application.

Before you begin

Ensure that you install the Azure apps in your environment.

Role required: oauth_admin

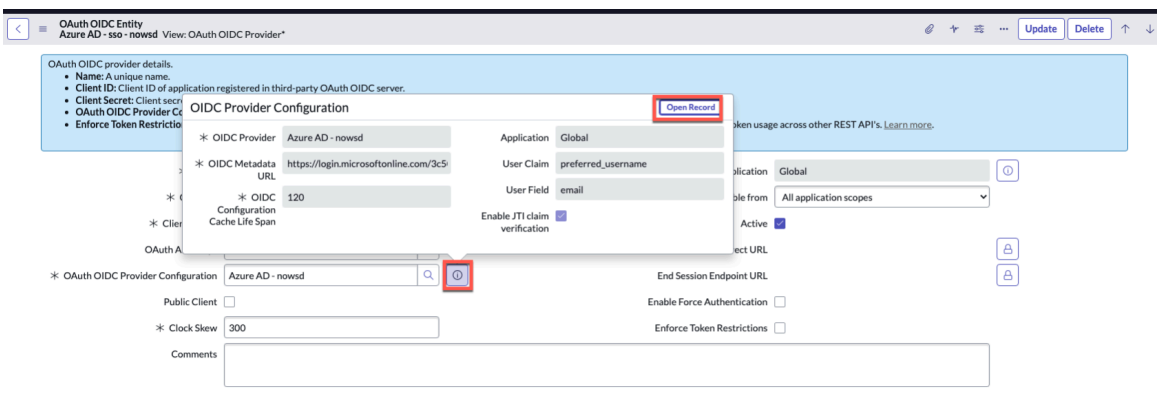
About this task

This step is only required if the upn is different from the email ID.

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select the OIDC record in the format **Azure AD – sso -**<tenantname> where <tenantname> is the name of your tenant.
3. Review the **OAuth OIDC Provider Configuration** entry.

   Note: This field is applicable for records of the type **External OIDC Provider**.



4. Select **Open Record**.

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5. In the **User Claim** field, enter `email`.
6. Select **Update**.

Change tenant to configure pre-published apps

Change the tenant to use pre-published apps in your environment.

Before you begin

Role required: External admin (external_app_install_admin)

About this task

If you have already set up a connection on a different Microsoft Teams tenant, changing to a new tenant stops the integration from working on the originally configured tenant. All users using the integration on the original tenant will no longer be able to use it. If you are only changing from self-configured Azure apps to pre-published Azure apps, but keeping the integration on the same Microsoft Teams tenant, there will not be an impact to users.

Uninstall the connected Microsoft Teams tenant from the original/registered ServiceNow instance. Then install the same Microsoft Teams tenant on the new/required ServiceNow instance.

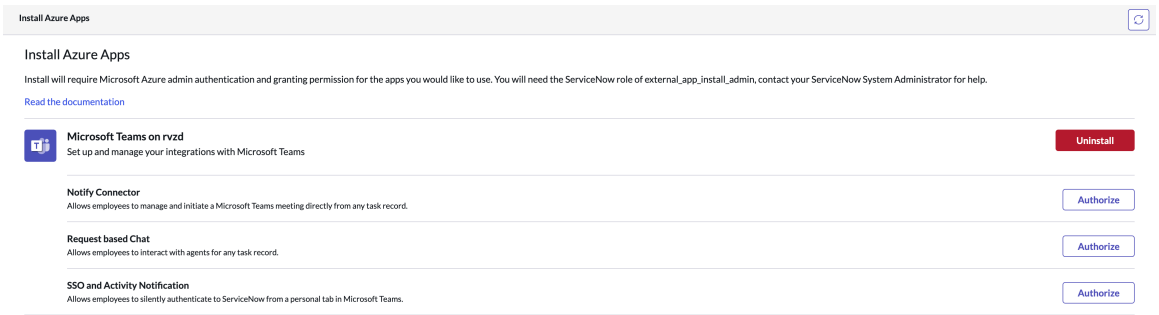
Procedure

1. Uninstall the connected Microsoft Teams tenant from the original ServiceNow instance.

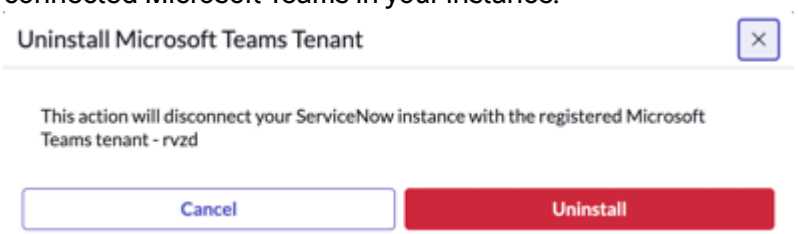
   a. Open your current/original/registered ServiceNow instance.

   b. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.

   c. Select **Uninstall**.



   d. Select **Uninstall** on the Uninstall Microsoft Teams Tenant dialog box to uninstall the connected Microsoft Teams in your instance.



   Your Microsoft Teams tenant is disconnected from the original/registered ServiceNow instance.

2. Install the same Microsoft Teams tenant on the new/required ServiceNow instance.

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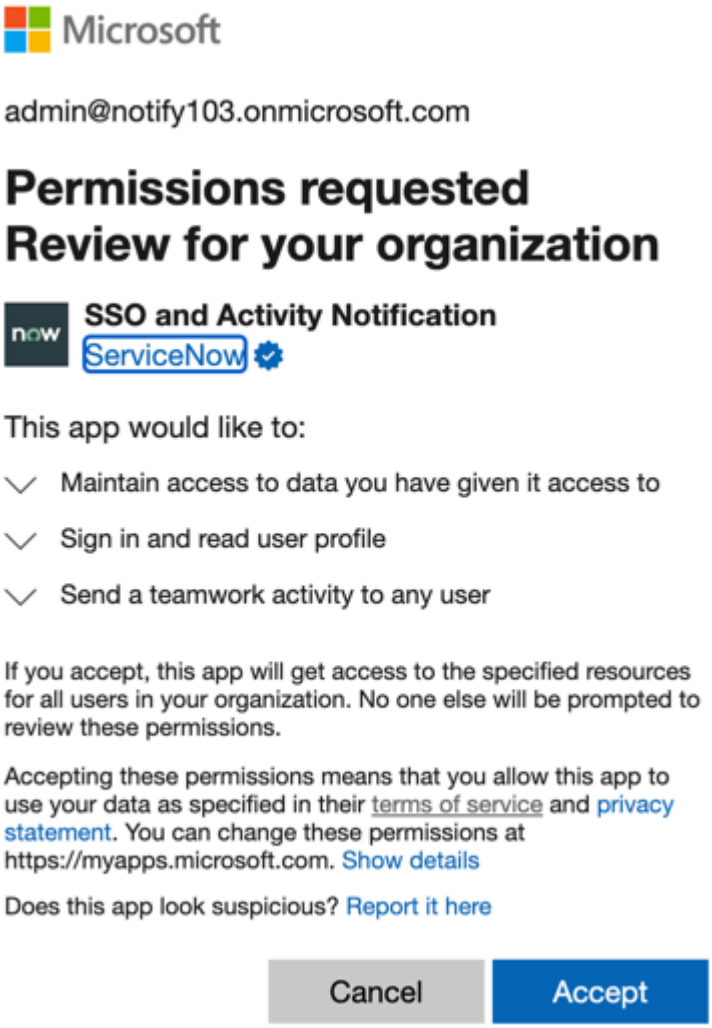
a. Open your new/target ServiceNow instance.

b. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.

c. Click **Install** to install the same Microsoft Teams in your new/target instance.

d. Select the **Consent on behalf of your organization** option to provide the consent for all your users, and click **Accept** button to provide the admin consent.



e. Once the tenant is mapped with the ServiceNow instance, you must authorize the apps by providing the admin consent.

The Notify Connector and Import Chat apps appear only if you install Notify plugin in your instance.

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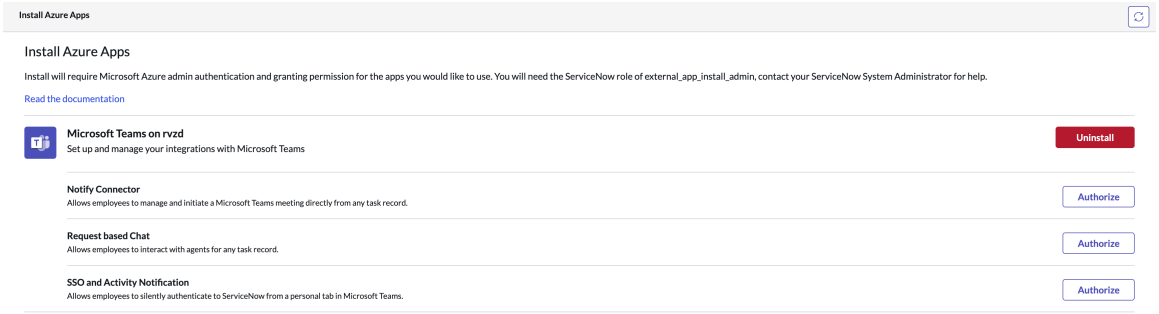

- **SSO and Activity Notification**: Authorize this app to display **Employee Center** tab in Microsoft Teams app.
- **Notify Connector**: Authorize this app to enable agents to initiate a Microsoft Teams meeting from a task record.
- **Request-based Chats**: Authorize this app to enable the agents to initiate chat in Microsoft Teams and import chat messages to the respective record.

f. Authorize the apps as required.

What to do next

You must upload the manifest file in Microsoft Teams. For more information, refer Create and download the manifest file for pre-published apps.

Override Microsoft Teams tenant connection

Override an existing tenant connection, only if, for any reason, you are unable to uninstall the connected Microsoft Teams tenant from the original ServiceNow instance.

Before you begin

Role required: External admin (external_app_install_admin)

About this task

Create the sn_now_azure.allow_tenant_override system property and set it to True. Then override the existing Microsoft Teams tenant connection on the Install Azure Apps page.

Note: ServiceNow doesn't recommend the override method.

Procedure

1. Open your new/target ServiceNow instance.
2. In the navigation filter, enter `sys_properties.list`.
3. Select **New** on the System Properties page.
4. On the System Property form, fill in the fields.
   - Search and select **Azure Active Directory User Mapping** as **Application**.
   - Enter **allow_tenant_override** in **Suffix**.
   - Name value **sn_now_azure.allow_tenant_override** is auto populated in **Name**.
   - Select **true | false** as **Type**.
   - Enter **true** in **Value**.
5. Select **Submit**.

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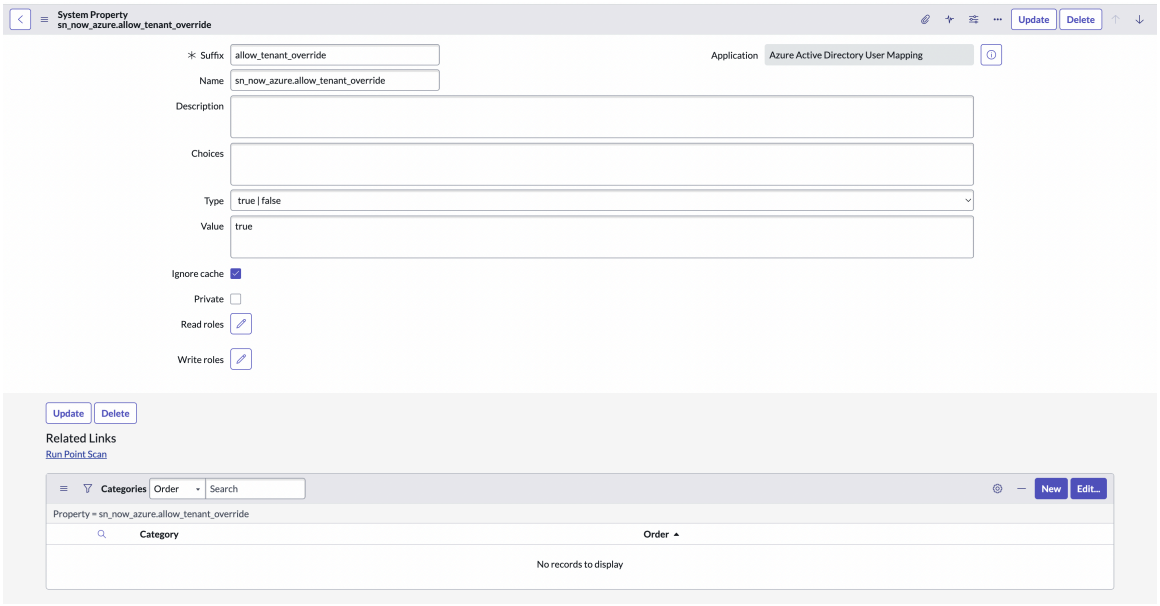
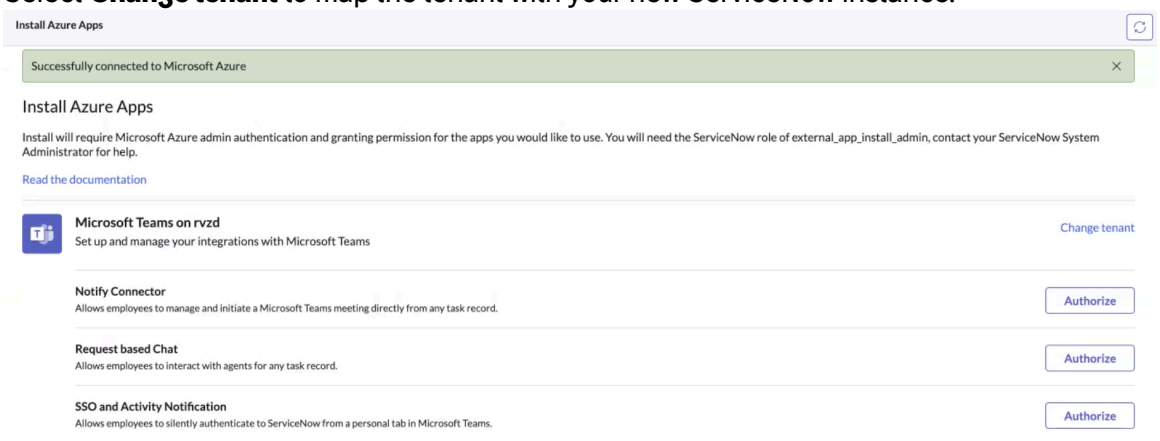
Note:

If the **Value** field entry is **false**, then the method of uninstalling the connected Microsoft Teams tenant from the original ServiceNow instance should be followed.



This activates the method of overriding the Microsoft Teams tenant connection on the Install Azure Apps page by enabling the **Change tenant** option.

6. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.
7. Select **Change tenant** to map the tenant with your new ServiceNow instance.



8. Enter **CHANGE** and select **Override connection**.

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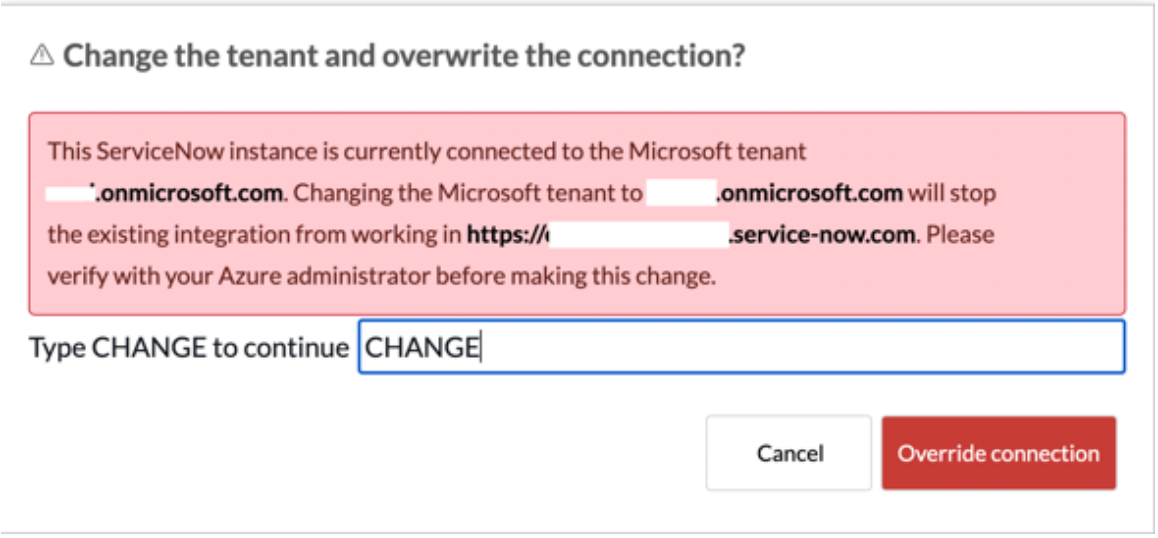

9. Authorize the apps by providing the admin consent after the tenant is mapped to the new ServiceNow instance.

Create and download the manifest file for pre-published apps

Create and download the ServiceNow for Microsoft Teams manifest file from your instance to enable Microsoft Teams to use the ServiceNow for Teams app.

Before you begin
Role required: external_app_install_admin

About this task
You can connect multiple ServiceNow instances to one Microsoft Teams tenant. For more information, see Integrating multiple ServiceNow instances with a single Microsoft Teams tenant.

Only one pre-published app setup can be connected to the Microsoft Teams tenant.

Note: You can connect multiple self-configured app environments to the Microsoft Teams tenant as you can create separate Azure apps for each self-configured app environment. For information about creating a manifest file for self-configured apps, see Create and download the manifest file for self-configured apps.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **ServiceNow for Teams**.
2. Select **New**.
   The **Generic Info** section opens.
3. On the **Generic Info** section, fill in the fields.

Generic Info Form

Field	Description
Short name	Short name for the manifest file.
Full name	Complete name for the manifest file.
Version	Version of the manifest file. For example, 1.0.0.

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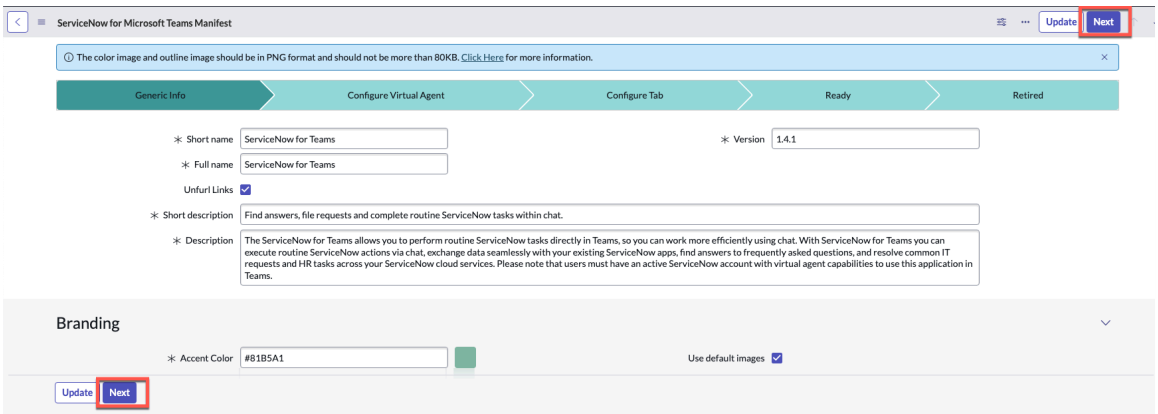
Field	Description
Unfurl Links	Option to unfurl the links in Microsoft Teams. Link unfurling generates a content-rich preview(adaptive card) when a supported link is shared in a conversation with a user in Microsoft Teams. For more details about link unfurling, refer Unfurl the web links in Microsoft Teams chat.
Short description	Short description about the manifest file.
Description	Detailed description about the manifest file.
Accent Color	Custom color for the conversations in Microsoft Teams according to the company branding. The accent color must be in the HTML color code format.
Use default images	Option to use the default images for branding. **Note:** If you want to customize the company branding, clear the **Use default images** option and then upload the icons. For more information on the size of icons, see App icons and manifest schema icons.

4. Select **Submit**.
5. Select **Next**.



The **Configure Virtual Agent** section opens

6. In the **Configure Virtual Agent** section, select either of the following options.
   - Select **Connect a single ServiceNow instance to your Microsoft Teams Tenant** to connect one ServiceNow instance to a Microsoft Teams tenant. The Virtual Agent Bot ID is auto-populated when you select this option.
   - Select **Connect multiple ServiceNow instances to your Microsoft Teams tenant** to connect multiple ServiceNow instances to one Microsoft Teams tenant. This is applicable for self-configured apps. For more information, see Create and download the manifest file for self-configured apps.

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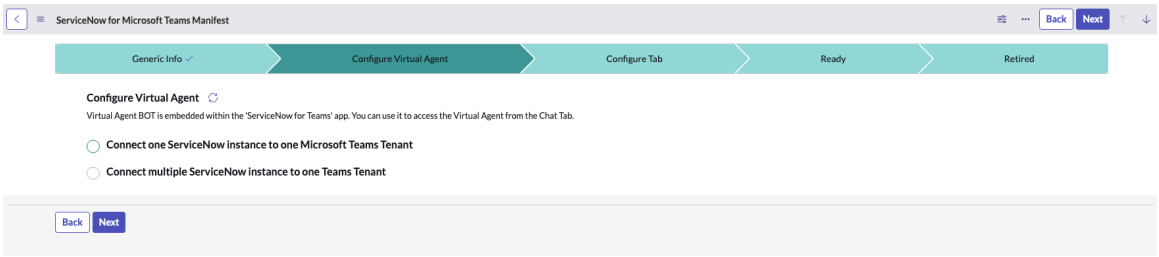
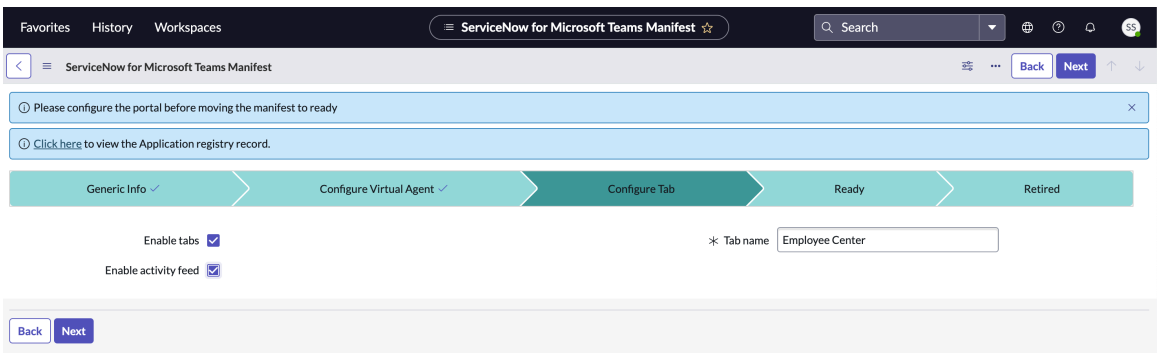


7. Configure the Virtual Agent in your instance.
   For more information, see Conversational Integration with Microsoft Teams.
8. In the **Configure Tab** section, fill in the fields.

Configure Tab form

Field	Description
Enable tabs	Option to add tabs in the Microsoft Teams application. This option is selected by default.
Tab name	Name of the service portal tab that appears in the Microsoft Teams application.
Enable Activity Feed	Option to enable the activity feed to receive campaign notifications in Microsoft Teams. This option is selected by default.

For a self-configured app, you must provide the Application (client) ID and Directory (tenant) ID in the **Configure Tab** section.



9. Select **Next**.
   The **Ready** section opens.
10. In the **Ready** section, select the **Enable Activity Feed** option to receive notifications for campaigns.
11. Navigate to the Application registry record and view the OIDC Provider Configuration record.
    - Select the link in the information message at the top of the page.
    - Navigate to **System OAuth** > **Application Registry** and select **Azure AD - sso - <Tenant-ID>**.

    The User Claim is part of the *id_token* that is fetched from Microsoft Entra ID (Entra ID). The **User Field** must be configured so that the value fetched from the User [sys_user] table matches the User Claim value.

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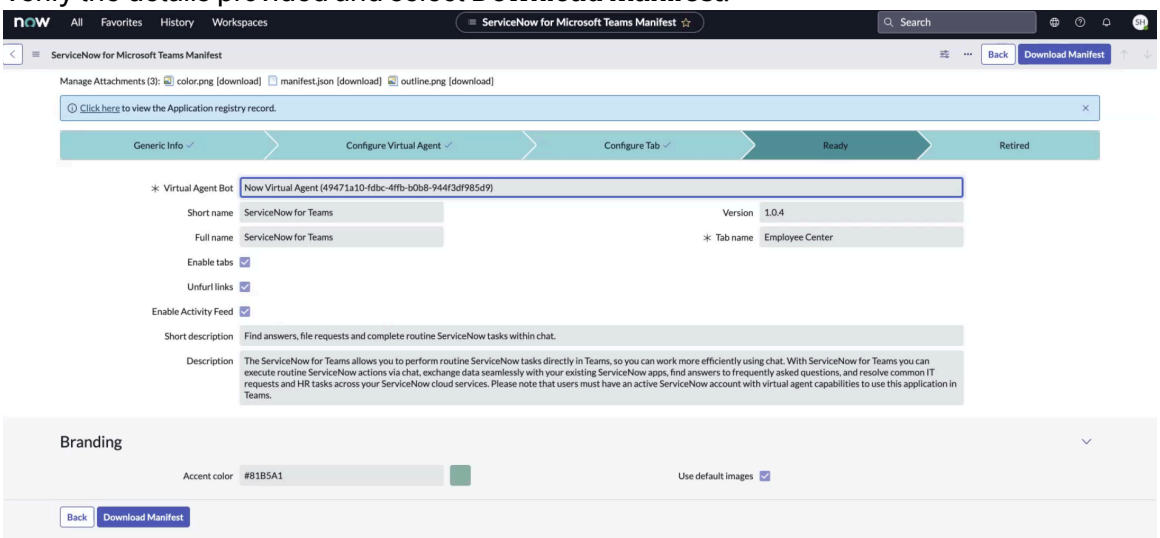
Note: If none of the configured fields match the User Claim value, you can create a custom field and enter the required value.

12. Verify the details provided and select **Download Manifest**.



The manifest file is downloaded in the zip format.

What to do next

You must upload the manifest file in Microsoft Teams. For more information, see Upload manifest file in Microsoft Teams.

Upload manifest file in Microsoft Teams

Upload the manifest file in Microsoft Teams to integrate Microsoft Teams with your ServiceNow instance.

Before you begin

Make sure that you have the manifest file for pre-published apps. For more information, see Create and download the manifest file for pre-published apps.

Role required: admin

Procedure

1. Launch Microsoft Teams application.
2. Navigate to **Apps** > **Manage your apps**, then select **Upload a customised app**.

Note:

Ensure that ServiceNow for Microsoft Teams is allowed as a third-party app in Microsoft Teams. For information about allowing apps in Microsoft Teams, see the Microsoft Teams documentation.

3. Navigate to the location where the manifest file is downloaded and select the zip file.
4. Click **Open**.

The **ServiceNow for Teams** appears in **Apps** screen.

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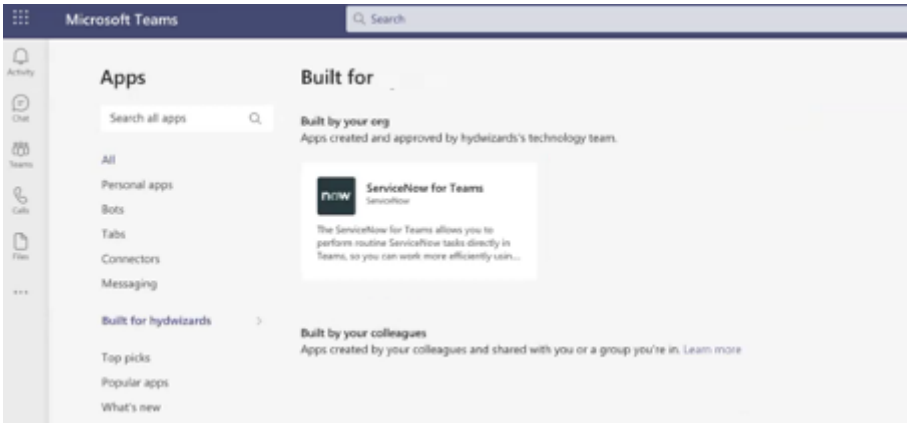
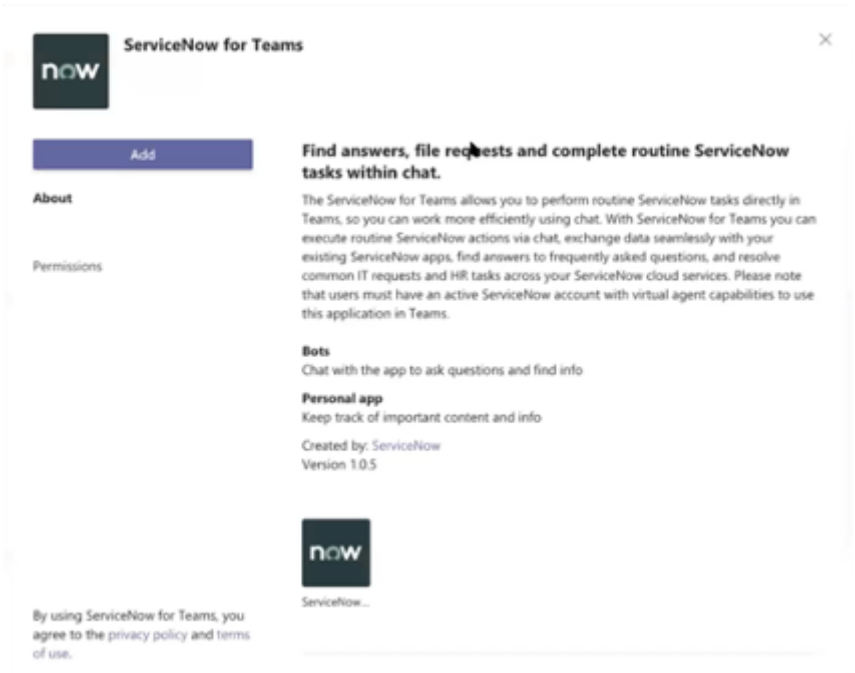


5. Click **ServiceNow for Teams** app.
6. Click **Add**.



The ServiceNow for Teams app appears in Microsoft Teams.

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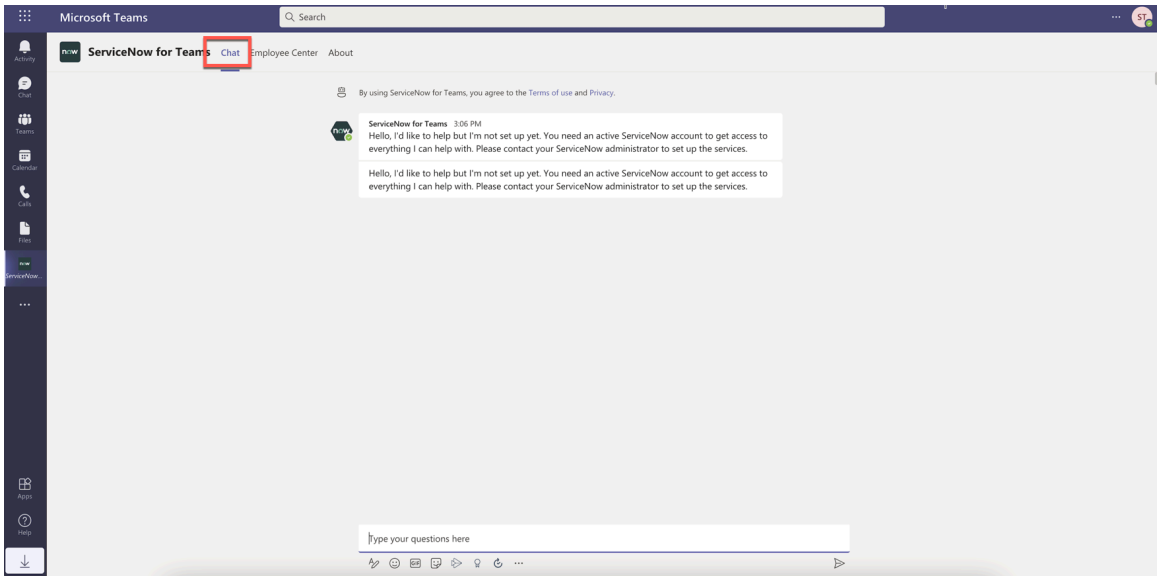
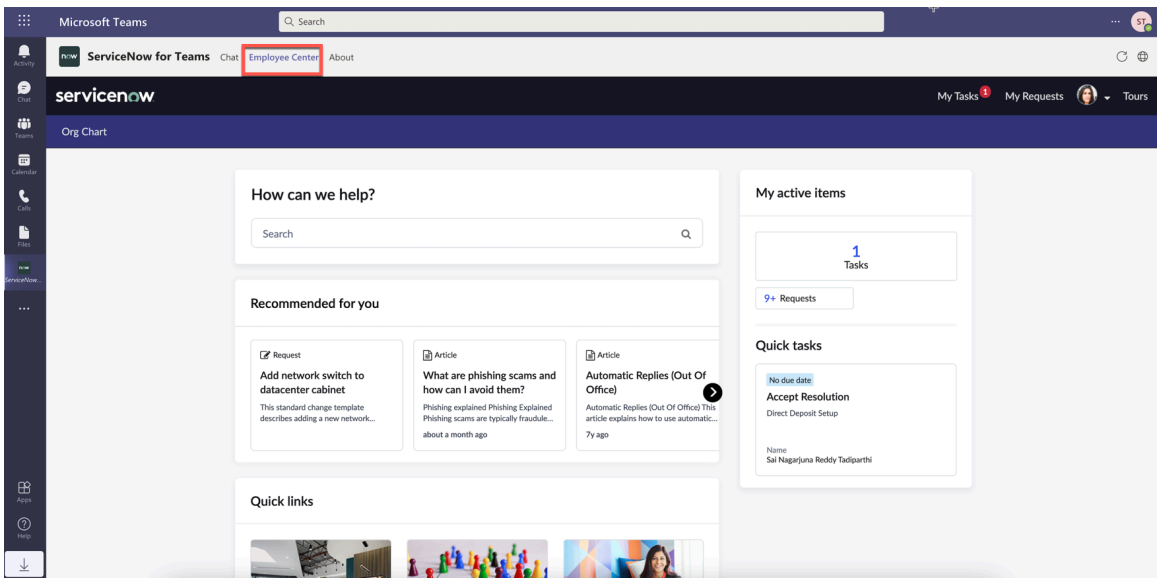
- **Chat**: Begin your conversation with the Virtual Agent to get help.



- **Employee Center**: Click **Employee Center** tab to view the organization updates and the status on your tasks and requests.



Note: If you don't want to create a manifest file, you can edit an existing manifest file as required. Upon updating the existing manifest file, you can download and upload the manifest file in Microsoft Teams to make the changes effective.

Update the app ID in the ServiceNow instance

Update the ServiceNow for Teams app ID from the Microsoft Teams admin center in your ServiceNow instance.

Before you begin
Role required: admin

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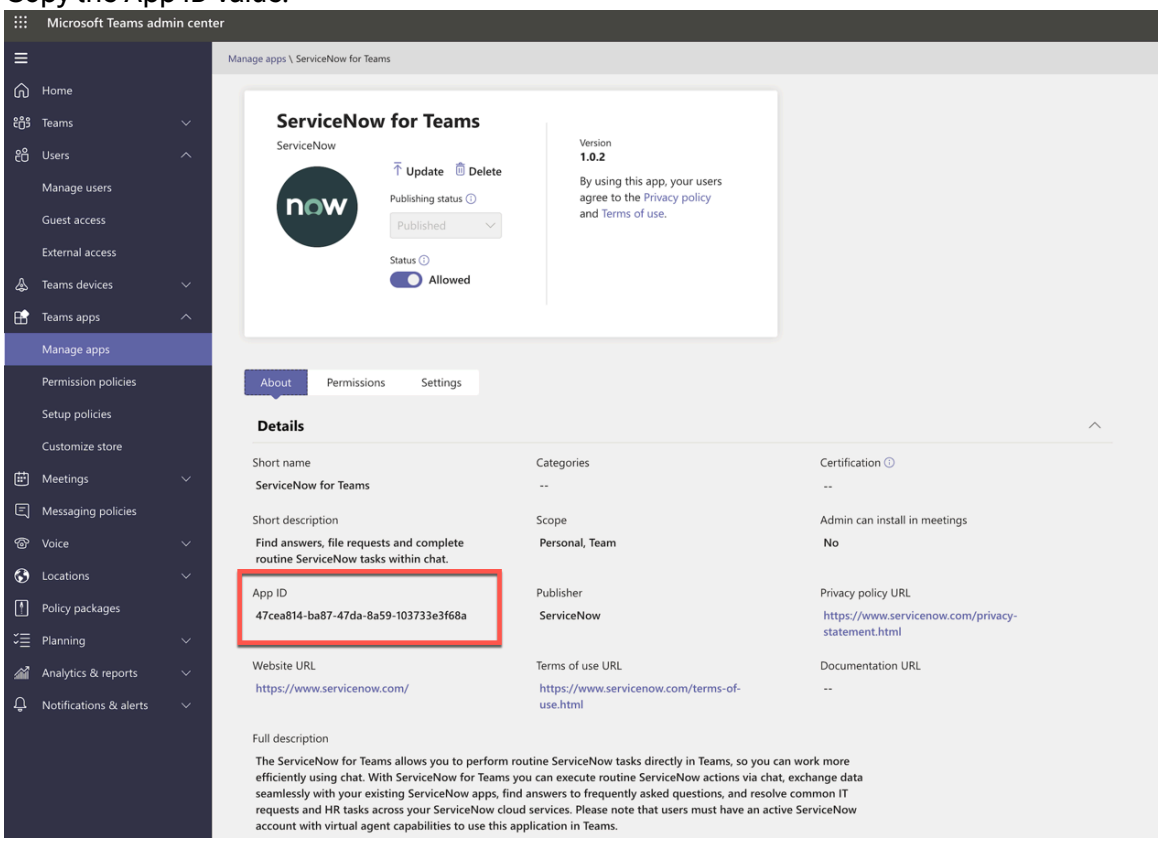
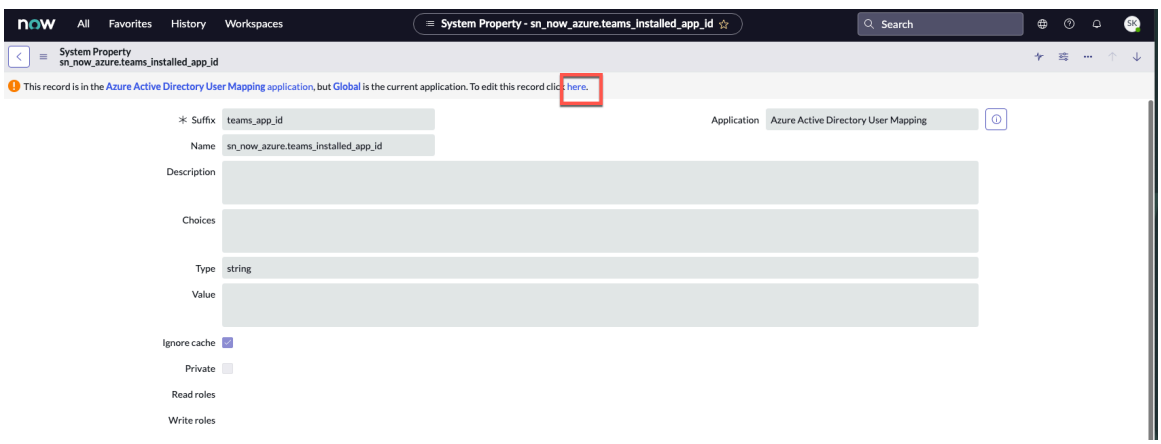
Procedure

1. Log in to the Microsoft Teams admin center.
2. Navigate to **Teams apps** > **Manage apps**.
3. Select the **ServiceNow for Teams** app.
4. Copy the App ID value.



5. In your ServiceNow instance, search for `sys_properties.list`.
6. Select the `sn_now_azure.teams_installed_app_id` property.



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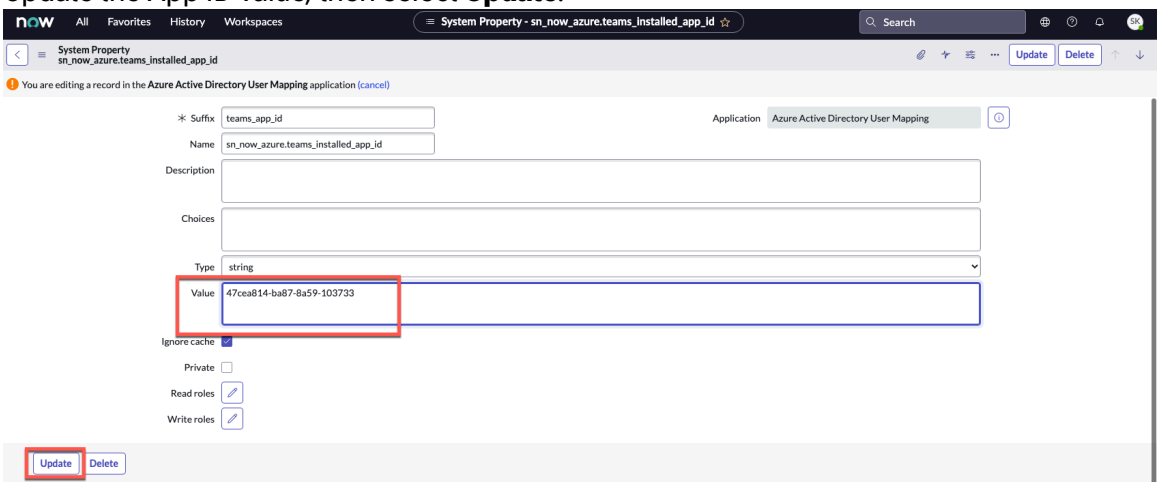
7. Update the App ID value, then select **Update**.



Disable the Now Virtual Agent

Disable the Now Virtual Agent app to avoid duplicate notifications from Microsoft Teams when you install and integrate ServiceNow for Microsoft Teams with your ServiceNow instance.

Before you begin

Note: Your employees will not see or use the Now Virtual Agent app.

Role required: Microsoft Teams admin

About this task

ServiceNow has two apps available for Microsoft Teams:

- Now Virtual Agent

  This app displays the Virtual Agent within Microsoft Teams, has been available within Microsoft Teams app since 2019.

- ServiceNow for Microsoft Teams

  ServiceNow for Microsoft Teams is a new app that provides a broader employee experience, including and expanding beyond Virtual Agent, with an embedded portal experience called **Employee Center**, and the ability for agents to reach out to employees in Microsoft Teams to quickly resolve open tickets.

Since the same Bot (Virtual Agent) is shared in both apps, blocking the Now Virtual Agent app also results in the same bot ID being blocked for the ServiceNow for Microsoft Teams app, making the Virtual Agent unusable in the ServiceNow for Microsoft Teams app. To work around this issue, it is necessary to make sure that the Now Virtual Agent app is in the list of allowed apps.

You must first block the Now Virtual Agent app, so it stops showing up for employees and then add the app to the allowed list. After this configuration, your employees will not see or use the Now Virtual Agent app, but will be able to use Virtual Agent within the ServiceNow for Microsoft Teams app.

Note: It may take up to 24 hours for the changes to be propagated.

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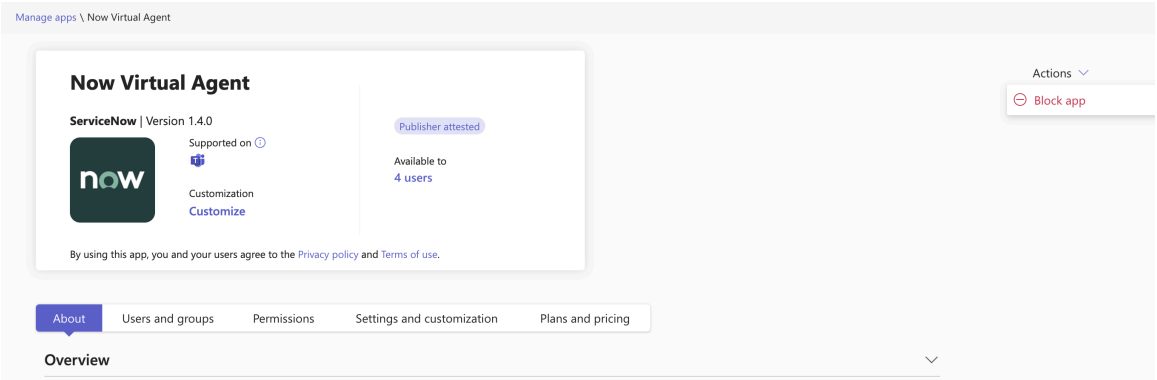
Procedure

1. Log in to the Microsoft Teams admin portal.
2. Navigate to **Teams apps** > **Manage apps**.
3. In the search field, enter `Now Virtual Agent`.
4. Select the **Now Virtual Agent** app.
5. Select **Actions**, then select **Block app**.



Translate the Microsoft Teams manifest file

ServiceNow for Microsoft Teams supports localization to multiple languages, using UTF-8 for international characters.

You must activate the localized plugins in your instance. To install the language plugin, see Activate a language.

After installing the language plugin, you must create and download the manifest file and upload the file to Microsoft Teams. To download the manifest file, refer Create and download the manifest file for pre-published apps.

Request-based chat access for a guest user

Request-based pre-published app chat access enables a guest user to start and import chats in a single ServiceNow® for Microsoft Teams instance.

Guest sharing is enabled by default in Microsoft Entra ID and in ServiceNow for Microsoft Teams. As a result, users can invite guests to teams and sites, and share files with guests without having to request assistance from the IT department.

Guests can take the following actions:

- Initiate a chat with people from outside their organization.
- Import their chat conversations with people from outside their organization.

For information about configuring access for guest users, see Guest access in Microsoft Teams.

Guest access configuration is applicable to the following tables in both IT Service Management integration with Microsoft Teams and HR Service Delivery integration with Microsoft Teams applications:

- HR Core task (sn_hr_core_task)
- HR Life events Case (sn_hr_le_case)
- HR Core case (sn_hr_core_case)
- Request Item (sc_req_item)

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- Task (sc_task)
- Incident (incident)
- Request (sc_request)
- Change request (change_request)

The ServiceNow system admin can extend guest access to other tables.

Enable chat access for a guest user

Enable chat access for a guest user while configuring ServiceNow® for Microsoft Teams settings for a pre-published app.

Before you begin

In an upgrade scenario for a pre-published app, after the upgrade process, you must reauthorize the Request-based chat and SSO and Activity Notifications applications. Reauthorization permits your ServiceNow instance to make API calls to Microsoft Azure. As a result, ServiceNow for the Microsoft Teams application workflow is enabled and your consent for the new API permissions is ensured. For more information, see Grant permissions to required Microsoft Azure apps.

Role required: External admin (external_app_install_admin)

About this task

Connecting the ServiceNow instance to your Microsoft Teams pre-published app automatically populates the fields tenant id, tenant full name, and source on the Teams Guest User Chat Configuration form. If you want to grant guest user access, enable the guest access in the Teams Guest User Chat Configuration form.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Teams Guest User Chat Configuration**.
2. On the form, fill in the fields.

Teams Guest User Chat Configuration form

Field	Description
Tenant ID	Auto-populated during the pre-published app installation. Directory (tenant) ID from the application overview page in the Microsoft Azure portal updates details in the ServiceNow instance.
Tenant full name	Auto-populated during the pre-published app installation. Full domain name of the tenant or host. For example, account1.onmicrosoft.com.
Enable Guest access	Option to enable the Client Credentials token to fetch user type details.

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Field	Description
	If you do not select this check box, then an error occurs when the guest tries to start or import a Microsoft Teams chat. **Note:** When the guest access is enabled, the sn_tcm_collab_hook.MS_Teams_Chat_App_Credentials value in the sys_alias table configured in Connection & Credential Aliases fetches the Azure user details. When the guest access is inactive, the sn_tcm_collab_hook.MS_Teams_Chat_Credentials value in the sys_alias table configured in Connection & Credential Aliases fetches the Azure user details.
Allowed Guest domains	The guest user domains where invited guests can start or import a chat. Only the tenants in these domains can start or import a chat. List multiple guest domain names as comma-separated values.
Source	Auto-populated during the pre-published app installation. This field is associated with the Tenant Connections module.

3. Select **Submit**.

Result

Guests belonging to the selected guest domains can now start or import chats.

User Presence Indicator

User presence indicator helps the agents to know the status of the users in *Microsoft Teams* before the agent can initiate a chat using *Microsoft Teams*.

By default, the agents can view the status of the users when they launch the Start chat modal in the ServiceNow instance.

When you are upgrading the application, you must reauthorize the **Request Based Chat** from **Install Azure Apps** page. For more information on installing the Azure apps, refer Grant permissions to required Microsoft Azure apps. Navigate to **All** > **ServiceNow for Microsoft Teams** > **Install Azure apps** and select **Reauthorize** option next to **Request Based Chat**.

The system takes 60 minutes to display the user presence status in the start chat modal for the first use when you upgrade to *IT Service Management* integration with *Microsoft Teams* v2.5.0 or Collaboration Services v3.5 applications.

The status of the user from *Microsoft Teams* is mapped into the ServiceNow instance as depicted in the table.

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User status mapping

User status in Microsoft Teams	Status shown in Start Chat modal
'Available', 'AvailableIdle'	available
'Busy', 'BusyIdle', 'DoNotDisturb'	busy
'Offline', 'PresenceUnknown'	offline
'Away', 'BeRightBack'	away

The user presence status is cached for 180 seconds, this implies if a user is “online” in *Microsoft Teams*, the Start Chat modal displays the user status as “online” until 180 seconds. If the user status is modified, the system fetches the user status after the interval of 180 seconds and updates the status in the Start Chat modal.

The time interval to cache the user status is configurable by a system property `sn_tcm_collab_hook.teams.presence_status_cache_invalidate_duration`. You can modify the time interval to retain the user presence status. For more information, refer Configure cache duration for the user presence status.

Configure cache duration for the user presence status

You can modify the system property to configure the cache duration to retain the user presence status of the *Microsoft Teams* user.

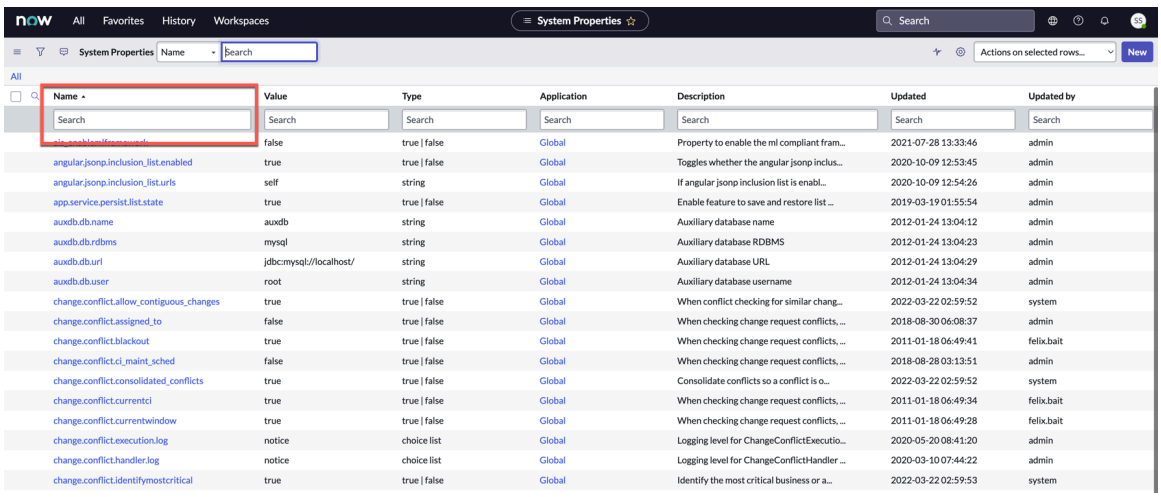
Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list` and press **Enter**.

   The entire list of properties in the System Properties [sys_properties] table appears.



2. In the Name column, search for the system property `sn_tcm_collab_hook.teams.presence_status_cache_invalidate_duration` and click the property to view the property details.

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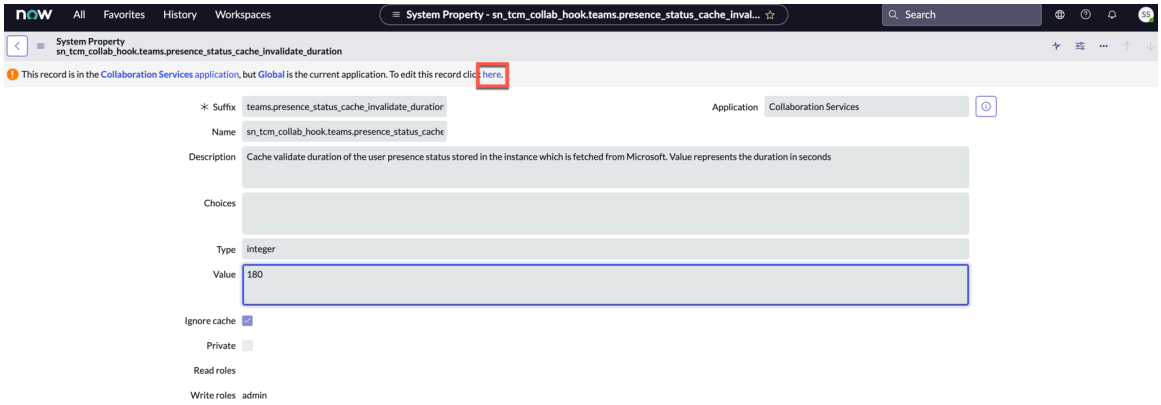
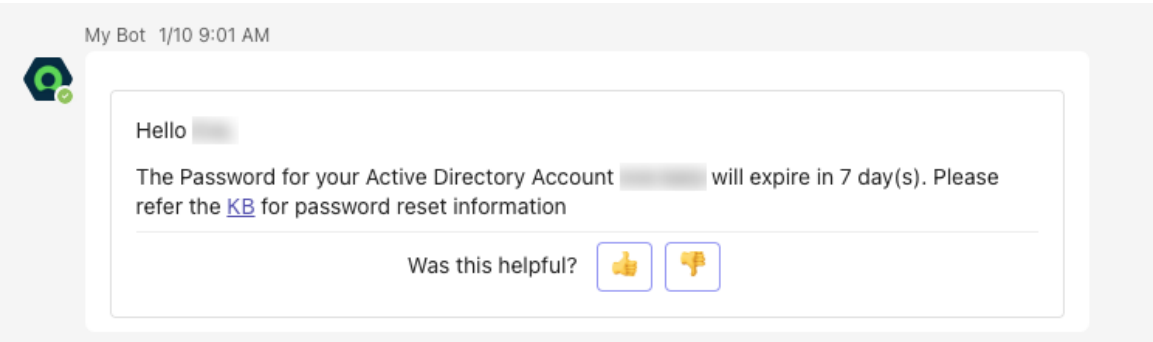


3. Click here to edit the property details.
4. Define the cache duration in seconds to retain the user presence status in the **Value** field.
5. Click **Update**.

Sending notifications to employees using Microsoft Teams

Integrate Microsoft Teams with the Employee Center to enable content managers to send notifications to employees through Microsoft Teams.

Send messages on Microsoft Teams to drive employee action, such as to read an article, watch a video, or perform a task.



The Employee Center contains two features, which content managers can use to send communications to employees:

Creating employee communications

Content Publishing provides a workflow to create and publish employee communications.

Content Experiences

Content Experiences provides a robust publishing configuration which controls the content availability, duration, and audience.

Integrating Microsoft Teams with Employee Center

You must have the following plugins installed in your environment:

- Employee Center Pro [com.snc.employee_center_pro]
- IT Service Management for Microsoft 365 [sn_now_teams_it]
- Glide Virtual Agent [com.glide.cs.chatbot]
- HR Service Delivery for Microsoft 365 [sn_now_teams_hr]

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- Conversational Integration with Microsoft Teams [sn_va_teams]
- Content Publishing [sn_cd]
- Content Experiences [sn_ca]

Configuring a Microsoft Teams notification

1. Create notification content for Microsoft Teams
2. (Optional) Translate the notification content
3. Publish the content:
   - Use **Content Publishing** > **Schedule Content** to make the content available to employees: Schedule delivery of Microsoft Teams notification content
   - To include the content in a multi-stage, multi-channel campaign, use **Content Experiences** > **Content Experience Builder**: Create Microsoft Teams notification content with Content Experience Builder

Send automatic campaign notifications in Microsoft Teams

Automatically send campaign notifications in Microsoft Teams for better collaboration and efficient communication.

Before you begin

After the upgrade process for a pre-published app configuration, you must reauthorize the SSO and Activity notifications application to enable your ServiceNow instance to make API calls to Microsoft Azure. ServiceNow for Microsoft Teams application work flow is then enabled and your consent for the new API permissions is ensured. For more information, see Grant permissions to required Microsoft Azure apps.

A manifest file to enable the campaign notification display in *`Microsoft Teams`* must exist.

If the configured Employee Center version is v.24 or above, then the Employee Center tab is present by default in your *`Microsoft Teams`* application. If the Employee Center version is lower than v.24, you must update the value of the portal in the `sn_now_teams.portal.suffix` property to `esc`. This value enables Employee Center in your instance.

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **ServiceNow for Teams**.
2. Select **New**.
3. Fill in the details in the **Generic Info** section.
   Select **Submit** and then select **Next**.
4. Fill in the details in the **Configure Virtual Agent** section and select **Next**.
5. In the **Configure Tab** section, verify that **Enable activity feed** is selected and select **Next**.

   Note: If you are modifying a base system manifest file, select **Enable activity feed** to receive notifications for campaigns.

6. Verify the details in the **Ready** section and select **Download Manifest**.
   The manifest file downloads in zip format.

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7. Upload the manifest file in Microsoft Teams.
   For more information about creating a manifest file, see Create and download the manifest file for pre-published apps. For more information about uploading a manifest file, see Upload manifest file in Microsoft Teams.

Create a Microsoft Teams campaign with content publishing

Create and distribute the Microsoft Teams campaigns using direct content publishing if you have the admin role.

Create notification content for Microsoft Teams

Create notifications to send messages directly to your employees through campaigns in Microsoft Teams.

Before you begin

- Install the necessary plugins:
  - Employee Center Pro [com.snc.employee_center_pro]
  - IT Service Management for Microsoft 365 [sn_now_teams_it]
  - Glide Virtual Agent [com.glide.cs.chatbot]
  - HR Service Delivery for Microsoft 365 [sn_now_teams_hr]
  - Conversational Integration with Microsoft Teams [sn_va_teams]
  - Content Publishing [sn_cd]
  - Content Experiences [sn_ca]
- Role required: sn_cd.campaign_manager
- A Microsoft Teams notification includes a link Create a video, URL, or to-do link

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Library**.
2. Either use an existing content record or create a notification.

Record source	Action
Existing content record	Select the content record from the list.
New content	**a.** Select **New**. **b.** Select **Notification** in the **Select the Plat form** column. **c.** Select **Microsoft Teams**. **d.** Select **Continue**.

3. On the form, fill in the fields.

Notification Content form

Field	Description
Title	Title of the notification. The title is not the subject of the notification, although they can be identical.

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Field	Description
	The default value is the app name provided in the manifest file. The value is appended with the phrase "posted a new campaign".
Subject	Subject of the notification, similar to the subject line in an email.
Description	Brief description of the notification.
Employee Center URL	The Employee Center URL that the notification directs the user to.
Content type	Option to select the type of notification that you want to send. This field is automatically set to Microsoft Teams.
Active	Option to indicate that the notification is active and available.

4. Save the settings and return to the Content list.
   - To save new content and settings, select **Submit**.
   - To save existing content settings, select **Update**.

What to do next
Make the content available to users: Schedule delivery of Microsoft Teams notification content.

Alternatively, you can build out a more robust publishing configuration using Creating campaigns

Schedule delivery of Microsoft Teams notification content

Schedule posting of notifications in Microsoft Teams channels.

Before you begin
Role required: sn_cd.content_manager, admin

Procedure
1. Navigate to **All** > **Content Publishing** > **Schedule Content**.
2. Select the content to schedule.
3. From the Schedule Content related list, select **New**.
4. On the Schedule content form, fill in the fields.
   For a description of the field values, see Schedule content form for Microsoft Teams notifications.
5. Select **Submit**.

Schedule content form for Microsoft Teams notifications

Complete the Schedule content form to schedule the posting of notifications in Microsoft Teams channels.

Schedule content form

Field	Description
Content	Content or information you want to make available to employees.

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Schedule content form (continued)

Field	Description
Title	Name for the schedule content record. This field is automatically set to the name of your content selected in the **Content** field.
Active	Option to indicate that the schedule for content is active and available to employees.
Add Users	Option to indicate that you want to add specific users to view your content. Selecting this option clears the values in the **Audience** field.
Audience	Names of the users from the list who you want to see the content.
Approvers	Names of the users to approve the content before it is publicly available. **Note:** This field can contain only users with the Content Approver [sn_ca.content_approver] role.
When to process	Date and time on which you want the content to be sent, created, or posted.
Content status	The status of your to-do content. • Pending: The Content Publishing scheduled jobs have not processed the content. • Scheduled: The content is scheduled and is queued to be processed. • Max Exceeded: The scheduled content exceeded the allowable time. The maximum value is configured in the *sn_cd.todo.max_run_time* property. • Error: An error in scheduling or posting the content occurred.
Completed on	The date and time the Content Publishing: Create To-dos scheduled job completed.

Translation support for Microsoft Teams notification campaigns

ServiceNow for Microsoft Teams supports localization to ServiceNow supported languages in campaigns.

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ServiceNow translates campaign content into the user-specific language set in your ServiceNow instance. If you have not set a user-specific language, the Microsoft Teams application delivers campaign content in the default global language set on your system.

You must activate the localized plugins in your instance to use this feature. For more information about plugins and installing the language plugin for ServiceNow supported languages, see Activate a language.

For more information about language settings for an instance, see Set default language for an instance and User specific language.

For more information about creating campaigns, see Create a Microsoft Teams campaign with content publishing and Create Microsoft Teams campaigns with the Content Experience Builder.

For more information about scheduling and executing a job, see Scheduled jobs.

Note: The **Title**, **Subject**, and **Description** field labels in the Notification content form are translated. For more information, see Create notification content for Microsoft Teams.

Create Microsoft Teams campaigns with the Content Experience Builder

If you have the admin role, you can create campaigns using the Content Experience Builder to distribute content to employees.

For information about campaigns and campaign bundles and stages, see Creating campaigns.

Create Microsoft Teams notification content with Content Experience Builder

Create or place notification content into a bundle or stage for a Microsoft Teams campaign using Content Experience Builder.

Before you begin

Role required: sn_ca.campaign_manager or sn_cd.content_admin

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select **New**.
3. On the Campaign form, fill in the fields.
   For a description of the field values, see Campaign form in the Content Experience Builder.
4. Click **Save** to remain on the campaign page.
   Clicking **Submit** returns you to the campaigns list.

What to do next

Click **Next** or the **Schedule of Content** tab to add stages and content to the campaign: Create Microsoft Teams campaign stages using the Campaign Builder Experience

Campaign form in the Content Experience Builder

Campaign form to create Microsoft Teams notification content using the Content Experience Builder.

Campaign form

Field	Description
Title	Unique name for the campaign.

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Campaign form (continued)

Field	Description
State	State of the campaign. • Draft: The campaign is in the creation process. When content and bundles are attached to the campaign, the **Publish** button appears in the form header. • Published: Activates all content for an audience. • Editing: The campaign is being edited.
Audience	Names of the users from the list who you want to see the content.
Approvers	User responsible for approving the campaign.
Start time	Date and time the campaign should launch.
End time	Date and time the campaign should end.
Re-evaluate campaign	Option for reviewing audience for a campaign. If the box is cleared, the *Content Experiences: Update Campaign Audience* scheduled job runs one time, after which the targeted audience is never re-evaluated or changed. Option to display the **Re-evaluate frequency** field so you can define how often you want the *Content Experiences: Update Campaign Audience* scheduled job to run. When your campaign is re-evaluated, the users dependent on the current audience criteria are removed or added.
Re-evaluate frequency	Frequency, in days, that you want to re-evaluate the audience. Audiences are re-evaluated after the *Content Experiences: Update Campaign Audience* scheduled job runs based on the value you enter here. This field appears only if the **Re-evaluate campaign** check box is selected. This field value overrides the default (7 days) value set in the **Campaign Re-evaluation** field in the Content Experiences system property. For more information, see Properties installed with Content Experiences.
Description	Descriptive information about the campaign.

Create Microsoft Teams campaign stages using the Campaign Builder Experience

Use the Campaign Experience Builder to create stages for your campaign. Campaign builder provides a simple, single-page view for managing content and assembling your campaign.

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Before you begin
Role required: sn_ca.campaign_manager or sn_cd.content_admin

About this task
For information about campaigns and campaign bundles and stages, see Creating campaigns.

Procedure
1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign.
3. From the Campaign Bundles related list, select **New**.
4. On the form, fill in the fields.

Campaign bundle form

Field	Description
Title	Name of the campaign bundle.
Campaign	Option to choose a campaign that is associated with the campaign bundle.
Trigger type	Option to choose a trigger type that determines how the campaign bundle starts or ends. To learn more about triggers, see Campaign bundle triggers
Offset trigger start	Enables you to move the end date forward or backward from the value in the **Trigger type** field.
Specify end	Indicates whether you want the campaign bundle to have a specific end.
Description	Brief description for the campaign bundle.

5. Select **Submit**.
6. From the Campaign Content related list, select **New**.
7. On the form, fill in the fields.

Campaign content form

Field	Description
Content	Description of the content record.
Campaign Bundle	The campaign bundle to associate with the content.
Title	Title for the campaign content. This value is automatically updated as per the value in the Content field.
Active	Option to indicate that the schedule for content is active and available to employees.
Description	Brief description about the campaign bundle.

8. Select **Submit**.
9. On the Campaign form, select **Publish**.

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Result

The campaign is delivered to the employees according to the scheduled job timeline.

Setup for integrating pre-published apps with Microsoft Teams for Agent Experience

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams pre-published app environment.

Integrate Notify connector pre-published app with Microsoft Teams

Set up the Notify connector for Microsoft Teams using the pre-published app. You can use the Microsoft Azure apps instead of creating a separate Microsoft Azure app for the integration.

Connect the ServiceNow instance to your Microsoft Teams tenant

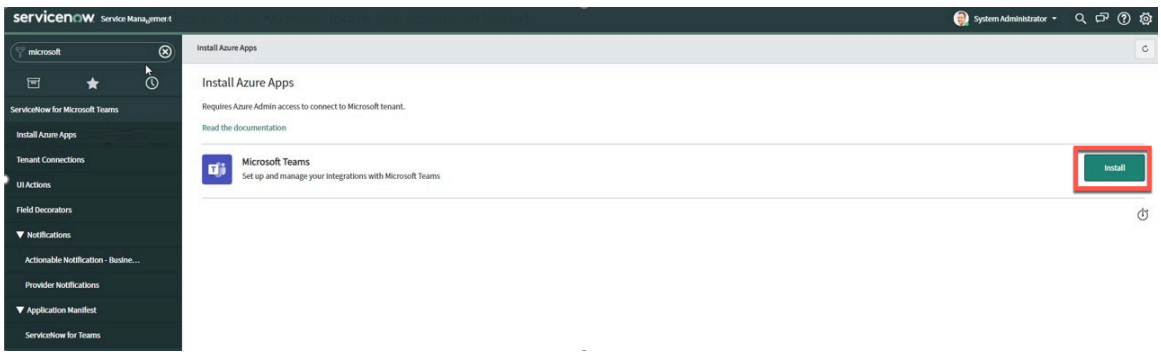
Connect your ServiceNow instance to your Microsoft Teams tenant to enable the users to create their requests from within Microsoft Teams.

Before you begin

Role required: External admin (external_app_install_admin)

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.
2. Click **Connect** to install Microsoft Teams in your instance.



3. Select the **Consent on behalf of your organization** option to provide the consent for all your users, and click **Accept** button to provide the admin consent.

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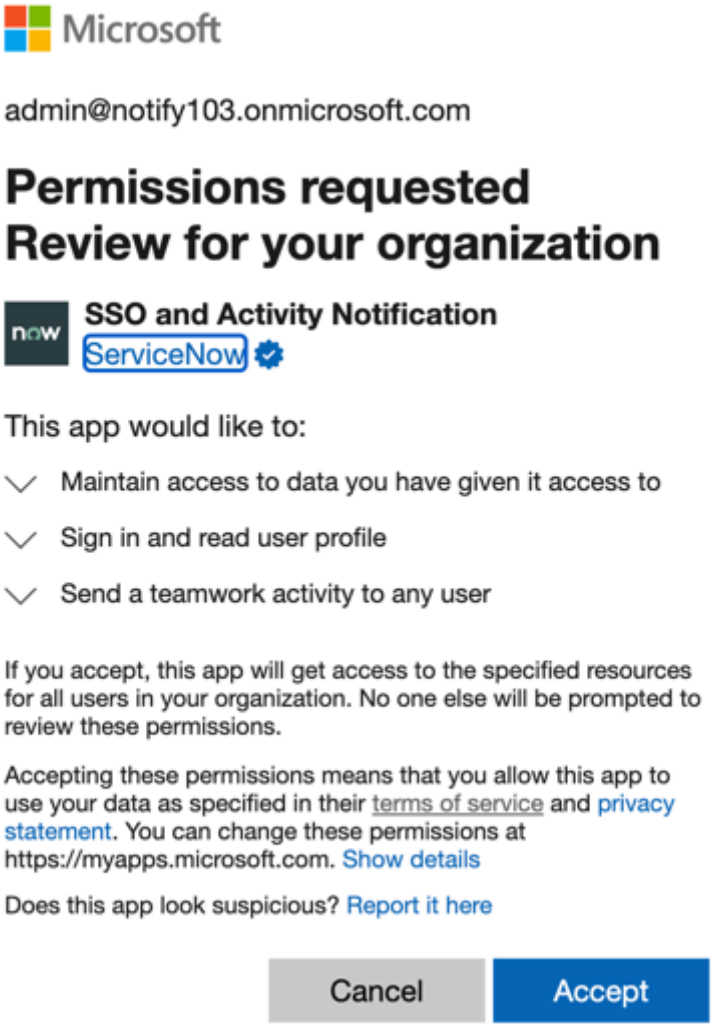

SSO and Activity Notification is one of the apps to verify the users and connect the Microsoft tenant to the ServiceNow instance. Provide the desired Microsoft tenant details to connect to the ServiceNow instance.

Select the **Consent on behalf of your organization** option to provide the consent for all your users.

Note: All the users must also accept the permissions, not accepting the permissions result in not being able to use the ServiceNow integrations with Microsoft Teams.

Authorize pre-published Azure apps to grant required permissions

Authorize the pre-published apps to enable ServiceNow to make API calls to Microsoft to enable each of the ServiceNow for Teams application workflows.

Before you begin

Role required: External admin (external_app_install_admin)

About this task

To connect your ServiceNow instance to your M365 tenant and to Authorize apps, the user must have both the external_app_install_admin role as well as the application administrator role in

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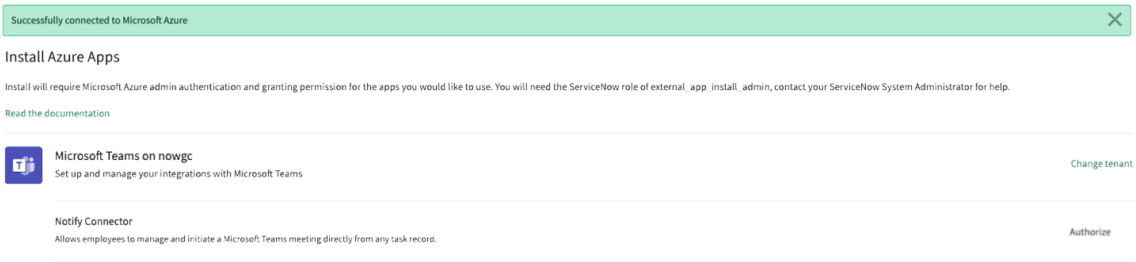
M365. Application administrator is a Microsoft driven role, for more information on roles, refer Azure AD built-in roles.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.



2. Click **Authorize** for Notify Connector.
3. Provide the admin consent by selecting **Accept**.

> **Note:** Additional permissions such as 'Manage Teams apps for all chats' and 'Allow the Teams app to manage all tabs for all chats' are required to create an app for meeting extensibility, and to create a new tab for a major incident meeting from the major incident workbench in Microsoft Teams.

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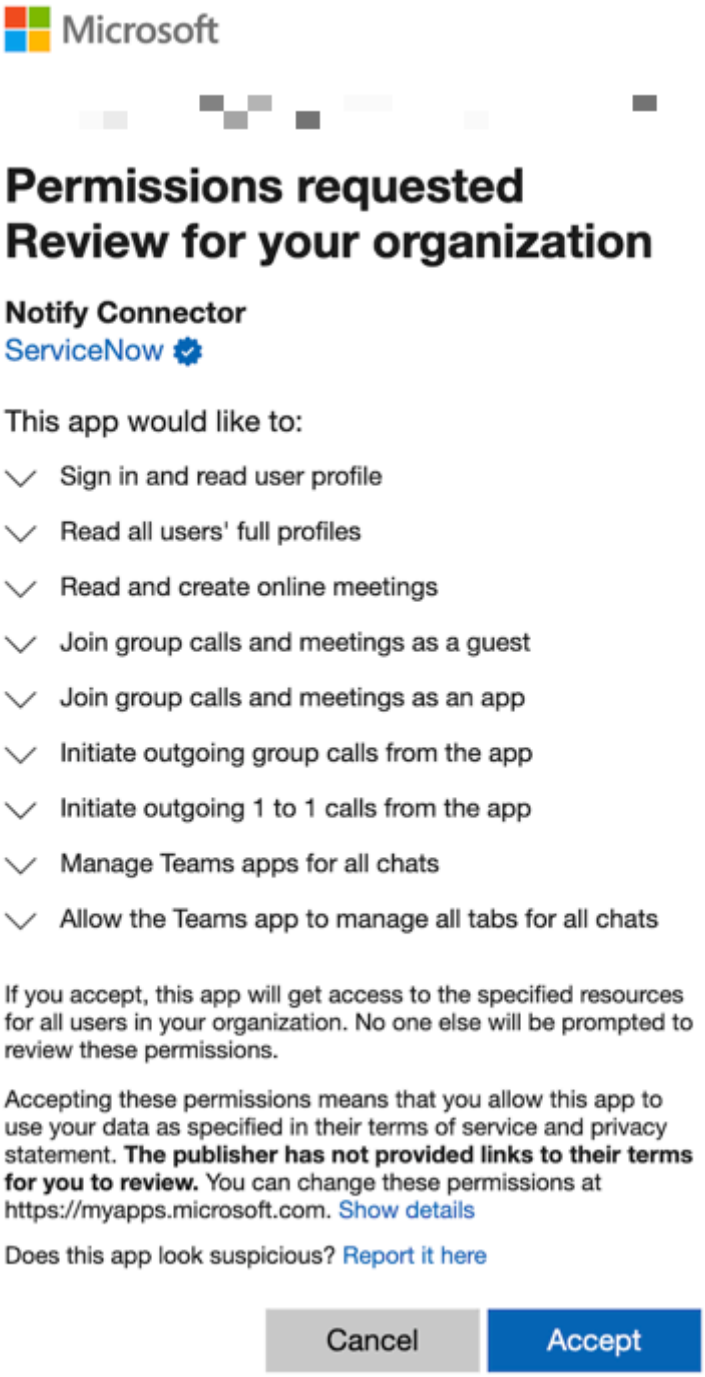

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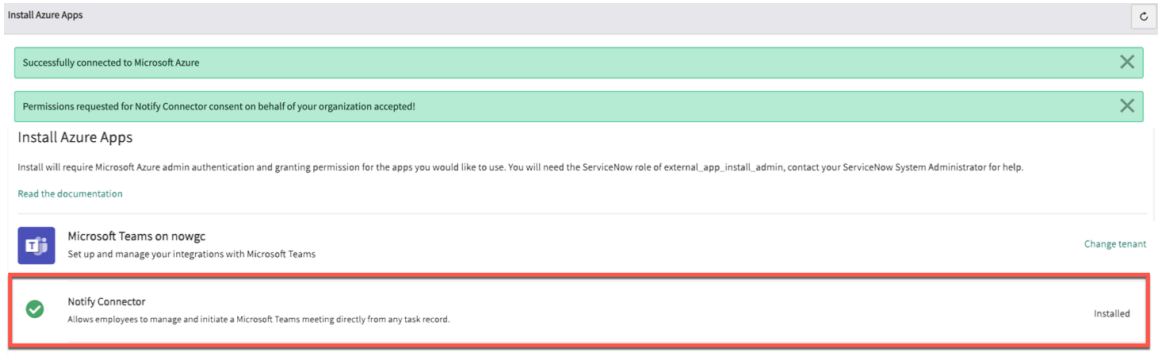
Upon successful authorization, the app is shown as **Installed**.



Create a Service user to make calls from Microsoft Teams

Configure Notify connector for Microsoft Teams in your environment by creating a Service user to have a seamless conference call experience in Microsoft Teams.

Before you begin

Role required: Microsoft Azure admin

Note: You must create a service user role, which will be able to start online meetings on behalf of users.

Procedure

1. Log in to Microsoft Azure portal.
2. Create a Service user.
   a. Navigate to **Azure services** > **User**.
   b. Select **New user**.
   c. On the form, fill the fields.

New user

Field	Description
User name	Option to provide the user name for the user.
Name	Option to provide the name of the user.

   d. Select **Create**.
   e. Select the created user to view the details.

Note: Ensure that the Service User has the required license/subscription and a valid usage location set to make conference calls from Microsoft Teams.

3. Run the PowerShell command from Terminal on macOS or from the Command prompt on Windows OS.

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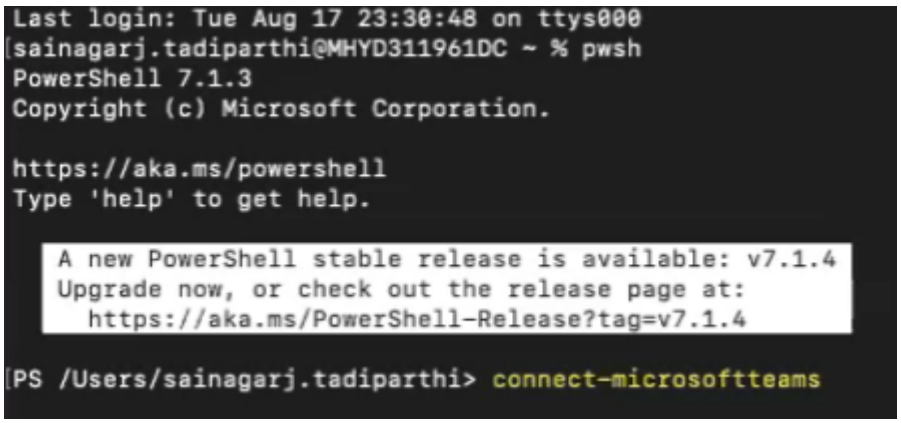
a. Type the command `pwsh` and press **Enter**.

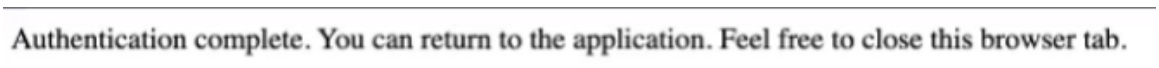
b. Connect your Microsoft tenant with PowerShell.

c. Run the following command in PowerShell.

```
connect-microsoftteams
```



Upon successful connection, a confirmation message is displayed in the browser.



PowerShell will also display the tenant details.



4. Run the Application Access Policy in PowerShell.
For more information on the application access policy, see Configure application access to online meetings.

Run the following command in PowerShell.

Use the App ID `ced2c8b2-7075-49fb-8dc9-7ebb41f89769` to grant permission to the Notify connector app. You can find the App ID in Microsoft Azure portal in the path: **Home** > **Enterprise applications** > **All applications**. Select the app created for Notify connector for Microsoft Teams.

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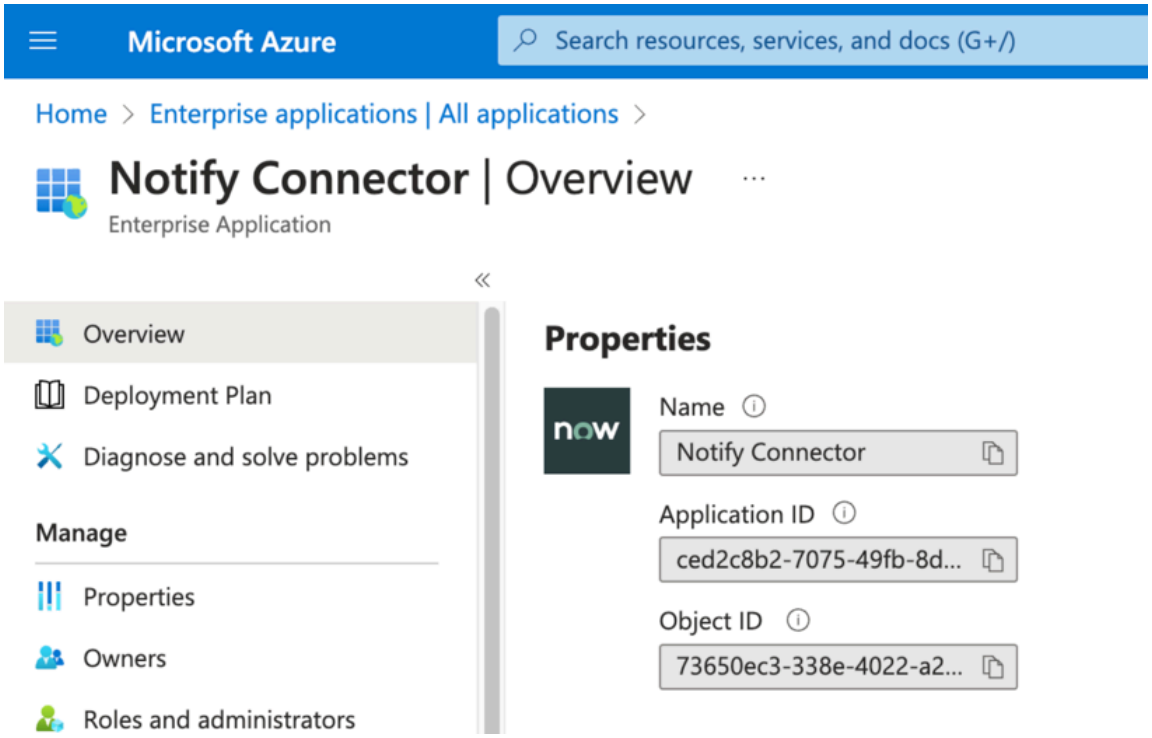


```
Syntax:

New-CsApplicationAccessPolicy -Identity "<PolicyName (can
 be anything)>" -AppIds "<AppIds>" -Description "<Policy
 Description>"

Example:
If you have a Pre-published (multi tenant) setup, use the
 application ID from Azure portal.

For Example: New-CsApplicationAccessPolicy
 -Identity "OnlineMeetingsAccessPolicy" -AppIds
 "ced2c8b2-7075-49fb-8dc9-7ebb41f89769" -Description "Grant
 OnlineMeeting Application Permission"
```



Upon successfully granting the permissions, the details are displayed in PowerShell.



5. Run the user permission policy in PowerShell.

   a. Go to the Microsoft Azure portal.

   b. Navigate to **Home** > **Users**.

   c. Select the user created.

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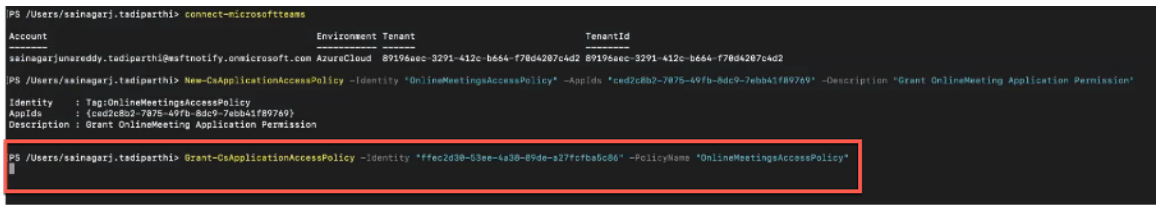
d. Copy the **Object ID** of the user to notepad.

e. Run the user policy command in PowerShell with PolicyName same as created in the previous step.

```
Syntax:

Grant-CsApplicationAccessPolicy -Identity "<UserAzureID>"
 -PolicyName "<PolicyName>"
```

You must provide your user ID in **UserAzureID** field and run the command in PowerShell.

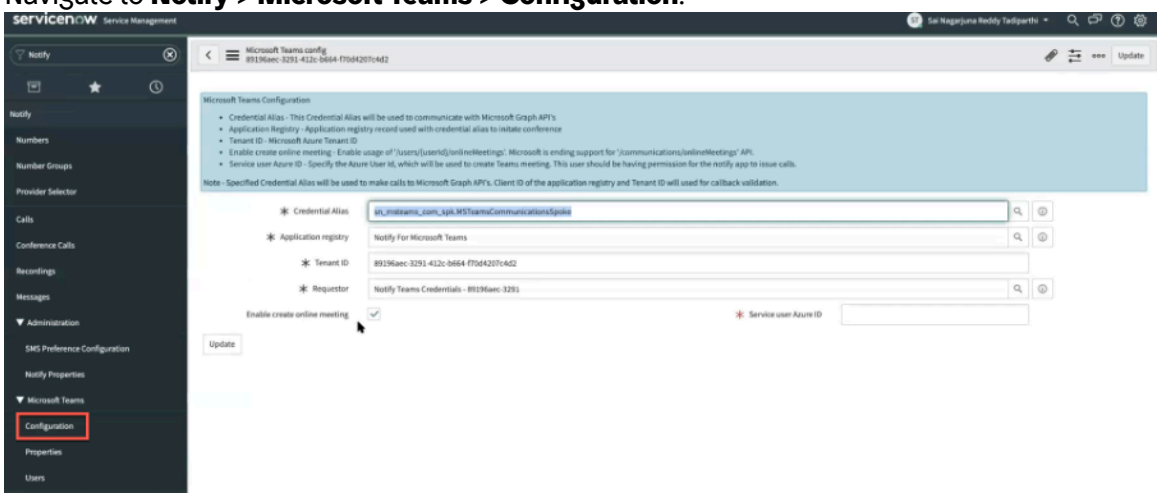
```
Example:

Grant-CsApplicationAccessPolicy -Identity
 "fdcd9c17-ceae-468f-906f-2er76b4dd0f4" -PolicyName "
 OnlineMeetingsAccessPolicy"
```



6. As a user with sn_notify_msteams.admin role, configure Microsoft Teams.

a. Open your ServiceNow instance.

b. Navigate to **Notify** > **Microsoft Teams** > **Configuration**.



c. Paste the **Object ID** of the user in **Service user Azure ID** field.

If you have performed an upgrade to Notify connector for Microsoft Teams, you must manually enable the **Enable create online meeting option**. You can then update the value in the Service user Azure ID field.

d. Select **Update**.

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Integrate Meeting Extensions pre-published app with Microsoft Teams

Configure the Meeting Extensions for Microsoft Teams using the pre-published app.

Notify connector for Microsoft Teams is the prerequisite for the functioning of Meeting Extensions app. So, ensure you have completed integration setup related to Notify connector for Microsoft Teams. For more information, see Integrate Notify connector pre-published app with Microsoft Teams.

Authorize pre-published SSO and Activity Notification Azure apps to grant required permissions

Authorize the pre-published SSO and Activity Notification apps to enable ServiceNow® to make API calls from a personal tab in Microsoft Teams.

Before you begin

Role required: External admin (external_app_install_admin)

About this task

To connect your ServiceNow instance to your Microsoft 365 tenant and to Authorize apps, the user must have both the external_app_install_admin role and the application administrator role in Microsoft 365. Application administrator is a Microsoft driven role, for more information on roles, refer Azure AD built-in roles.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Install Azure apps**.
2. Select **Authorize** for SSO and Activity Notification.
3. Provide the admin consent by selecting **Accept**.

> **Note:** Additional permissions such as 'Manage Teams apps for all chats' and 'Allow the Teams app to manage all tabs for all chats' are required to create an app for meeting extensibility, and to create a new tab for a major incident meeting from the major incident workbench in Microsoft Teams.

Upon successful authorization, the app status is displayed as Installed.

Download manifest file

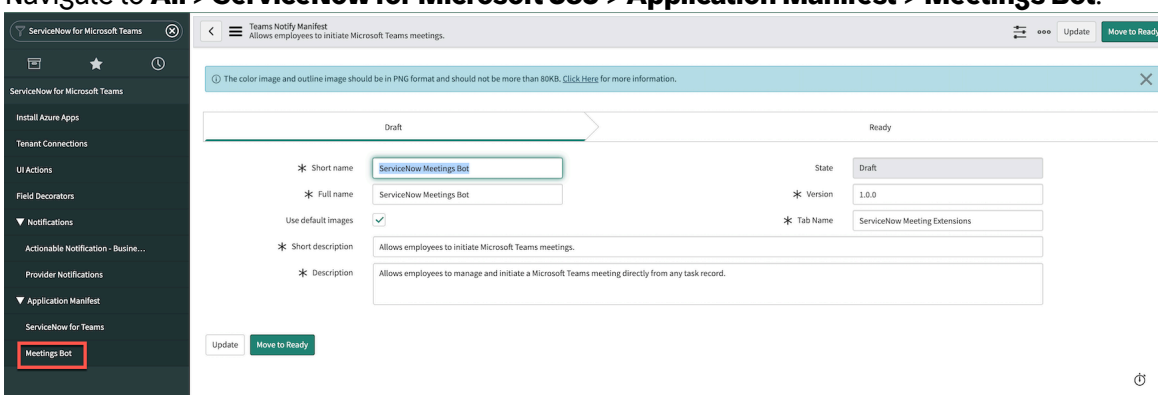
Download the Notify connector for Microsoft Teams manifest file from your instance.

Before you begin

Role required: external_app_install_admin, admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **Meetings Bot**.



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After you install the ServiceNow for Teams pre-published app, the client ID and the app ID entries will not be displayed in the manifest screen.

2. On the form, fill in the fields.

Manifest for Notify connector for Microsoft Teams

Field	Description
Short name	Short name of the meetings bot.
State	State of the manifest file.
Full name	Complete name of the meetings bot.
Version	Version of the meetings bot.
Use default images	Option to use default images for the meetings bot. **Note:** If you want to customize the company branding, clear the **Use default images** option and then upload the icons. For more information on the size of icons, refer App icons and manifest schema icons. You can upload an image for **Color image** and **Outline image** options.
Short description	Short description for the manifest file.
Description	Detailed description for the manifest file.

3. Select **Move to Ready**.
4. Select **Download Manifest**.

Manifest file is downloaded on your system.

Configuring Notify connector for Microsoft Teams app in Microsoft Teams

Configure the manifest file in Microsoft Teams client or admin center to use Notify connector for Microsoft Teams app.

You can upload the manifest file in Microsoft Teams using one of the following procedures.

- Configure Notify connector for Microsoft Teams app in Microsoft Teams
- Configure Notify connector for Microsoft Teams app in Microsoft Teams

Configure Notify connector for Microsoft Teams app in Microsoft Teams

Configure the manifest file in Microsoft Teams client to use Notify connector for Microsoft Teams app.

Before you begin

Role required: Microsoft Teams admin

Procedure

1. Launch Microsoft Teams application.
2. Navigate to **Apps** > **Manage your apps** > **Upload an app**.
3. Upload manifest file on Microsoft Teams client using one of the following procedures.

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- Select **Upload an app to your org's app catalog** if you are an admin.
- Select **Submit an app to your org** if you are not an admin and for a Microsoft Teams admin to approve.

a. Search, select, and open the downloaded app manifest file. An acknowledgement of request submission to your admin is displayed.

b. Log in to the Microsoft Teams admin portal as Microsoft Teams admin.

c. Navigate to **Teams apps** > **Manage apps**.

d. Search the app by name and select to open. The app default status is Blocked.

e. Select **Publish** and select **Publish** on the Publish your custom app? pop-up page. The app status is changed to Allowed.

It may take some time for the uploaded app to appear on the Microsoft Teams admin center.

Result
The **ServiceNow Meetings Bot** card appears in Microsoft Teams.

Configure Notify connector for Microsoft Teams app in Microsoft Teams

Configure the manifest file in Microsoft Teams admin center to use Notify connector for Microsoft Teams app.

Before you begin
Role required: external_app_install_admin, admin

Procedure

1. Log in to Microsoft Teams admin portal.
2. Navigate to **Teams apps** > **Manage apps** > **Upload new app** > **Upload**.
3. Search, select, and open (in the Upload a custom app dialog-box) the manifest file you downloaded.

Result
The **ServiceNow Meetings Bot** card appears in Microsoft Teams.

Map ServiceNow Meeting Extensions app ID in ServiceNow

Map the ServiceNow Meeting Extensions app ID in your ServiceNow instance to automatically add the meeting extensions tab in Microsoft Teams for a conference call.

Before you begin
Role required: sn_notify_msteams.admin and Microsoft Teams admin

Procedure

1. Copy the Meeting Extensions App ID.

a. Log in to Microsoft Teams admin portal.

b. Navigate to **Teams apps** > **Manage apps**.

c. Search and select **ServiceNow Meeting Bot**.

d. Select **ServiceNow Meeting Bot**.

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e. Copy the App ID in a notepad.

Note: Ensure that you are copying the value of the **App ID** and not the **External app ID**.

This **App ID** must be updated in System Properties in ServiceNow instance.

2. Paste the Meeting Extensions App ID.

a. Log in to the ServiceNow instance.

b. Navigate to **Notify** > **Microsoft Teams** > **Properties**.

c. Update the **Application ID of Meeting Extensibility teams app** field with the above App ID.

d. Click **Save**.

Note: Log in to the Microsoft Teams portal, under **Apps**, search and open **ServiceNow Meetings Bot** app at least once for the Meeting Extensions app to work.

Meeting Extensions app is set up.

What to do next

After completing Meeting Extensions integration with Microsoft Teams, see the section Meeting Extensions for Microsoft Teams.

Setup for integrating self-configured apps with Microsoft Teams

Prepare your environment to set up and configure ServiceNow for Microsoft Teams integrations using the self-configured app.

Setup for integrating self-configured apps with Microsoft Teams for Employee Experience

Set up self-configured apps to integrate with IT, HR, and Universal Request through Microsoft Teams. Employees can interact with the agents from within Microsoft Teams to resolve their issues.

Create Microsoft Azure application and authenticate users to access Employee Center in Microsoft Teams

Create a Microsoft Azure application in the Microsoft Azure portal to enable agents to start and import the chat conversations, and assign permissions to users to view the Employee Center dashboard in the Microsoft Teams application.

Before you begin

Role required: Microsoft Azure admin

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Microsoft Entra ID** > **Manage** > **App registrations**.
3. Select **New registration**.
   The **Register an application** form appears.

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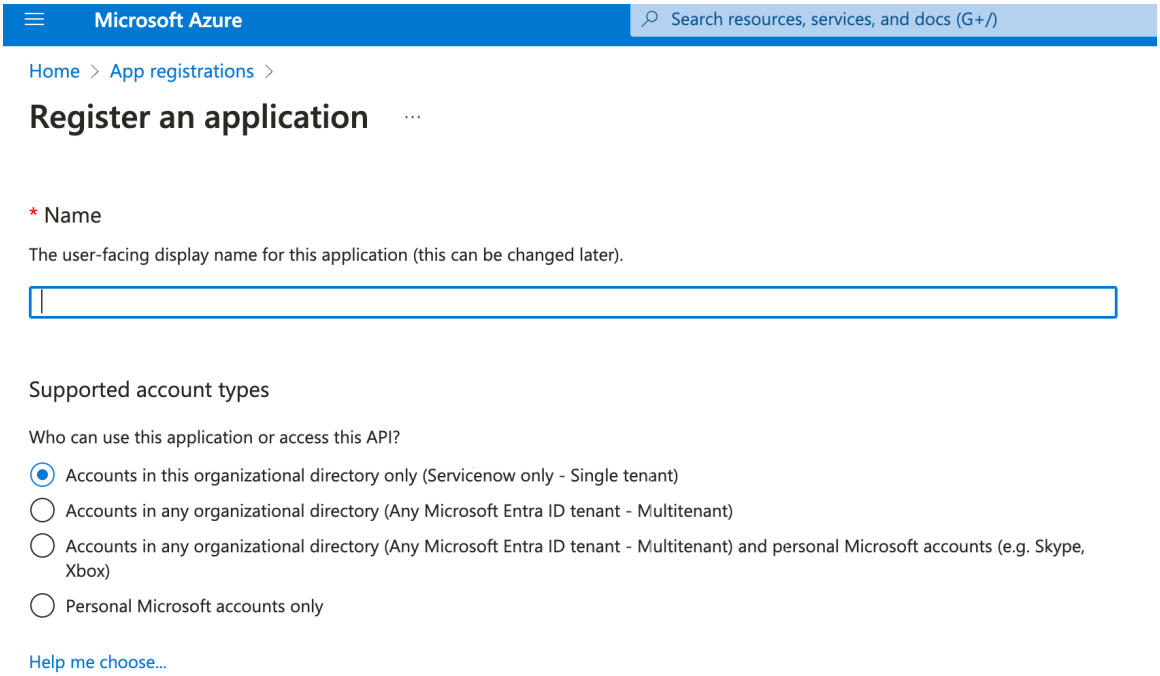

4. Enter the name for your application, for example: `ServiceNow Auth app`, on the Register an application page.
5. Select **Accounts in this organizational directory only (Servicenow only - Single tenant)**.
   For more information on why this option is selected, see Identity and account types for single- and multi-tenant apps.
6. Select **Register**.
   A new Microsoft Azure app is registered.
7. Navigate to **Manage** > **Authentication**.
8. Select **Add a platform** > **Web**.
9. On the **Configure Web** form, fill in the fields.

Configure Web form

Field	Description
Redirect URIs	Provide the redirect URI. The redirect URI should be in the following format: `https://<instance-url>/sn_now_teams_ms_login.do` where <instance-url> is the ServiceNow instance URL.
Implicit grant	Select **Access tokens** and **ID tokens**.

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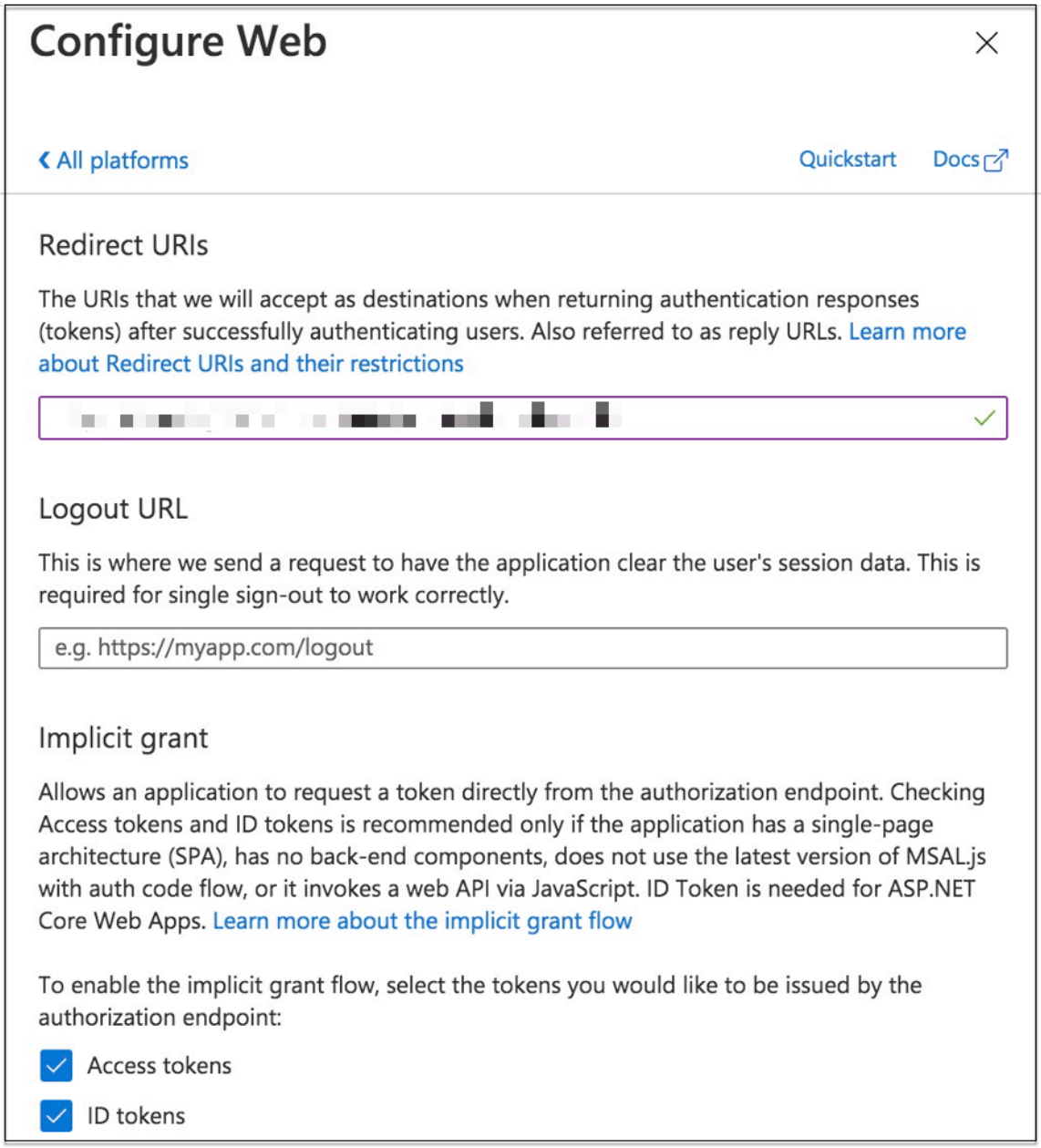

10. Select **Configure**.
11. Navigate to **Manage** > **API Permissions** > **Add a permission** > **Microsoft Graph**.
12. Select **Delegated permissions**.
13. Select **Openid permissions** accordion, and select **email**, **offline_access**, **openid**, and **profile** check boxes.

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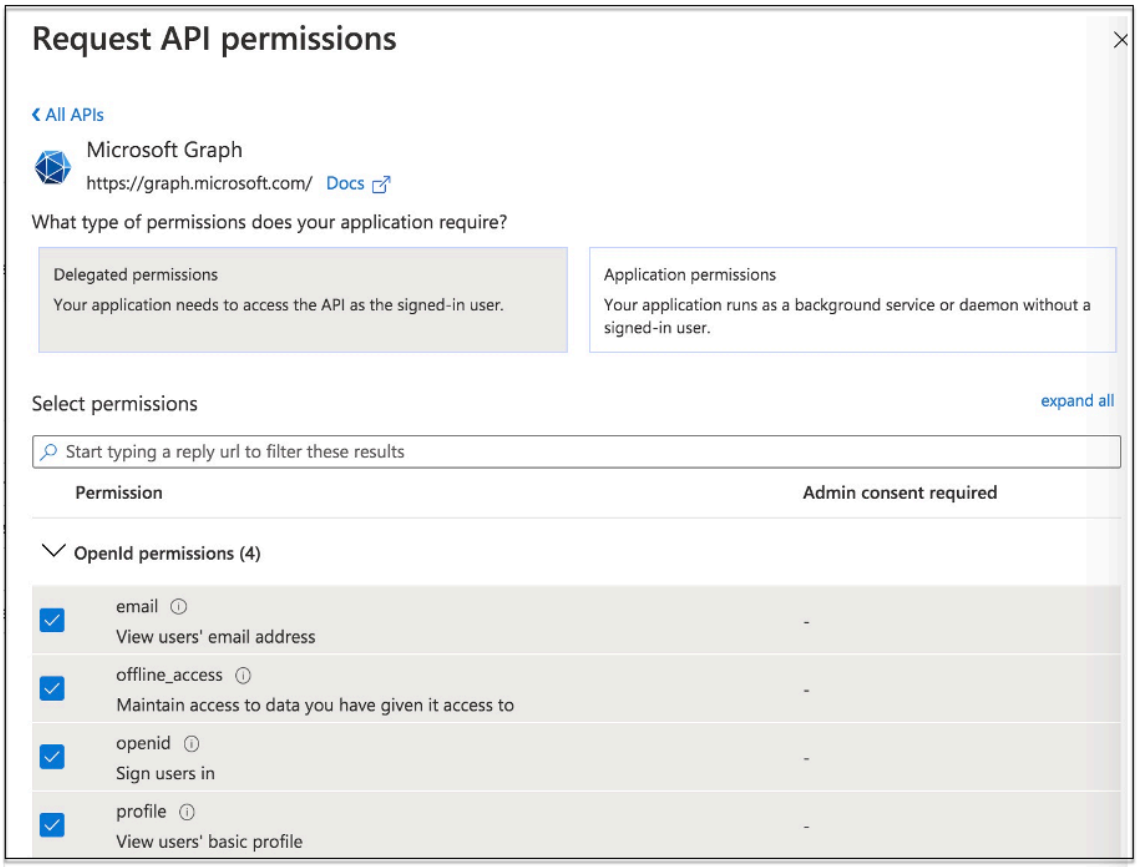

14. Select **Add permissions**.
15. In the **API permissions** screen, select the **Grant admin consent for {tenant}** link.
16. Select **Yes** on the pop-up dialog box.
17. Navigate to **Manage** > **Expose an API**.
18. Select **Set against Application ID URI**, and enter the application URI in the format: `api://<instance>.<domain_name>.com/<client_id>`.

    Note: The client ID is the application ID from your Microsoft Azure portal.

19. Select **Save**.
20. Select **Add a scope**.
    In the **Add a scope** form, fill the following fields.

Add a scope form

Field	Description
Scope name	access_as_user
Who can consent	Admins and users
Admin consent display name	Teams can access the user's profile.
Admin consent description	Allows Teams to call the app's web APIs as the current user.
User consent display name	Teams can access the user profile and make requests on the user's behalf.
User consent description	Enable Teams to call this app's APIs with the same rights as the user.

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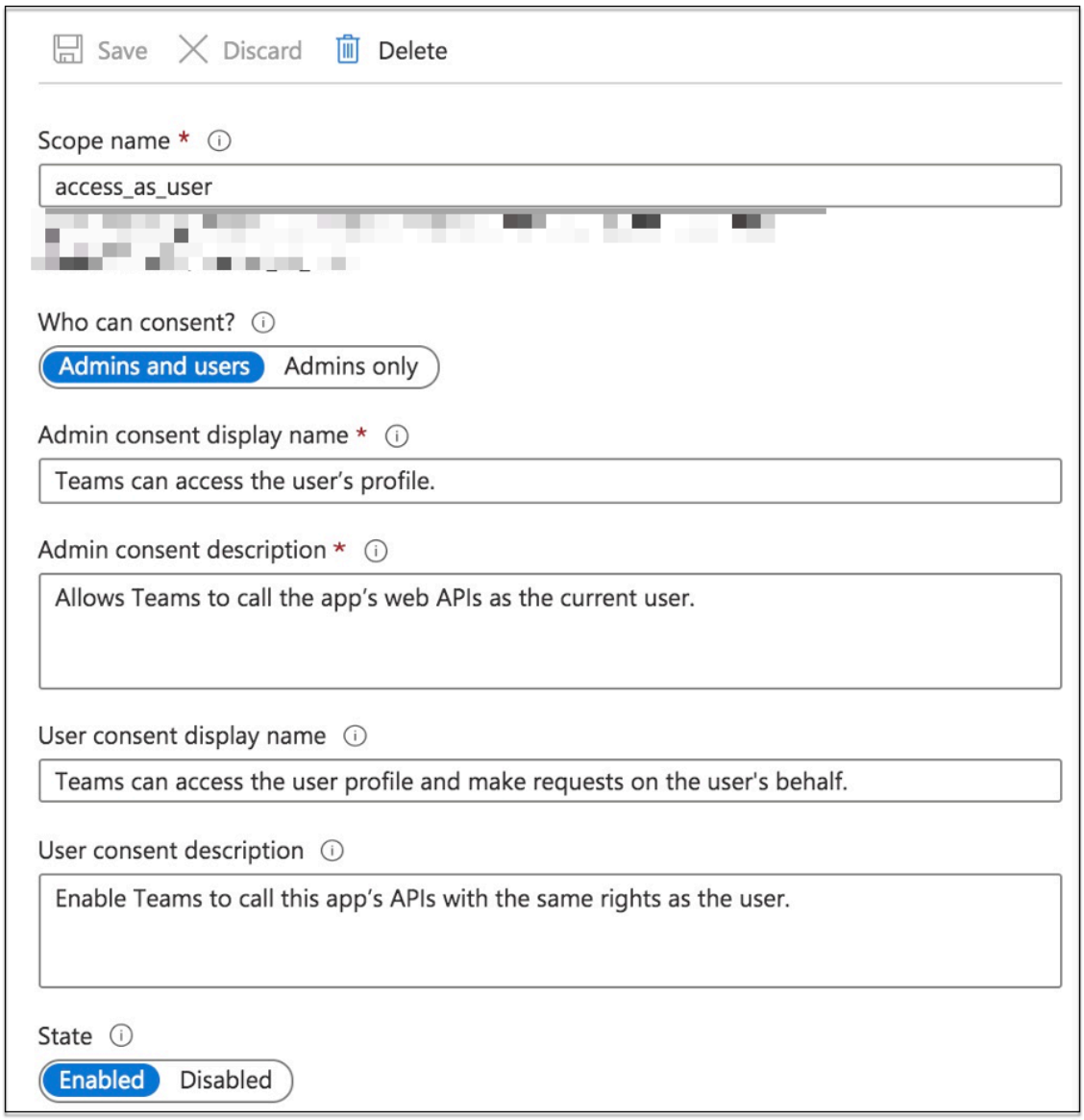
Field	Description
State	Enabled



21. Select the **Add scope** button.
22. Navigate to **Authorized client applications** > **Add a client application**.
23. In the **Add a client application** form, fill the fields.

Add client application form

Field	Description
Client ID	○ Microsoft Teams mobile/desktop application: **1fec8e78-bce4-4aaf-ab1b-5451cc387264**

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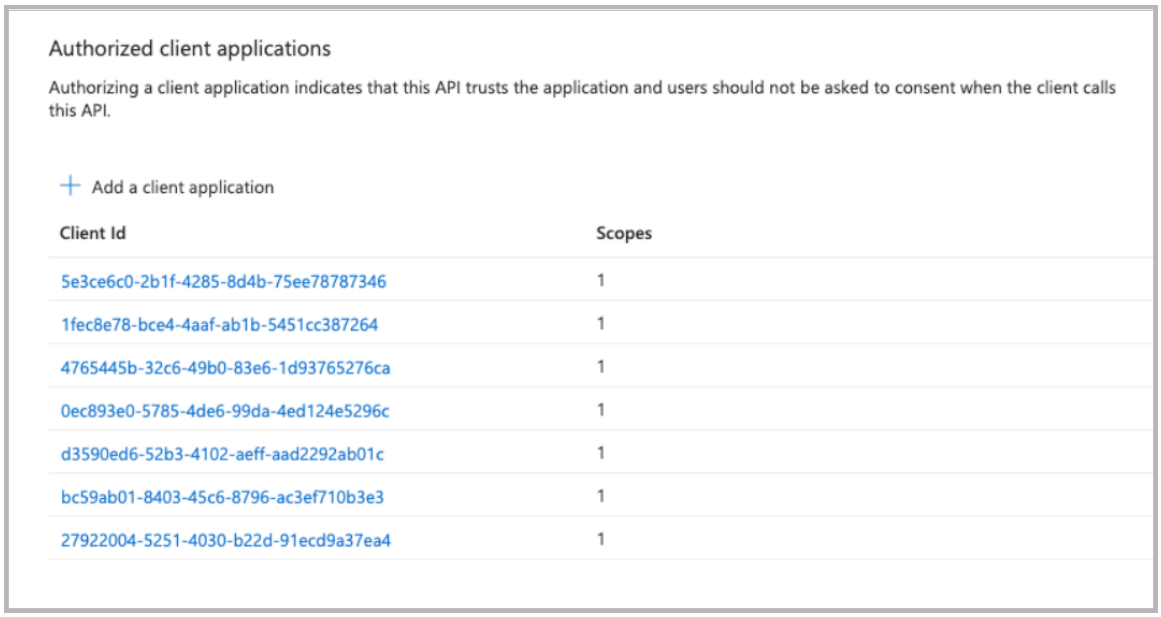
Field	Description
	○ Value for Microsoft Teams web application: **5e3ce6c0-2b1f-4285-8d4b-75ee78787346**
Authorized scopes	Check the authorized scope

Note: For using Employee Center in Microsoft 365 applications, add the following client IDs:

Microsoft 365 applications client IDs

Client ID	Description
4765445b-32c6-49b0-83e6-1d93765276ca	Microsoft 365 web application
0ec893e0-5785-4de6-99da-4ed124e5296c	Microsoft 365 desktop application
d3590ed6-52b3-4102-aeff-aad2292ab01c	Client ID for Outlook desktop application web application
bc59ab01-8403-45c6-8796-ac3ef710b3e3	Client ID for Outlook web application
27922004-5251-4030-b22d-91ecd9a37ea4	Client ID for Outlook mobile application

For more information on the client IDs, see Configure your tab app in Microsoft Entra ID in the Microsoft Teams documentation.



24. Select the **Add application** button.

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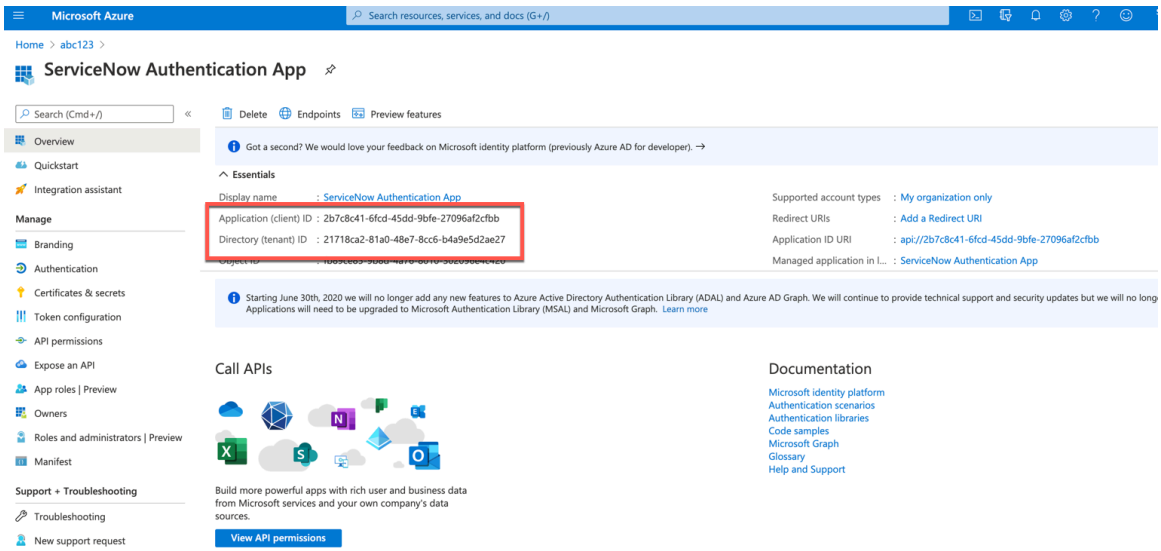
Copy the Application (client) ID, and Directory (tenant) ID from the application overview page in the Microsoft Azure portal to update the details in the ServiceNow instance.



Create and download the manifest file for self-configured apps

Create and download the ServiceNow for Microsoft Teams manifest file from your instance to enable Microsoft Teams to use the ServiceNow for Teams app.

Before you begin

Role required: external_app_install_admin

About this task

You can connect multiple ServiceNow instances to one Microsoft Teams tenant. For more information, see Integrating multiple ServiceNow instances with a single Microsoft Teams tenant.

Multiple self-configured app environments can be connected to the Microsoft Teams tenant as you can create separate Azure apps for each self-configured app environment.

This process is for configuring a Microsoft Teams manifest file, which dictates how an application would behave in Microsoft Teams. For information about the manifest generation provided by ITSM/HR, see Auto-generate the manifest file for uploading on Microsoft Teams, which includes more available configurations.

Note: You can only connect one pre-published app setup to the Microsoft Teams tenant. For information about creating a manifest file for pre-published apps, see Create and download the manifest file for pre-published apps.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **ServiceNow for Teams**.
2. Select **New**.
   The **Generic Info** section opens.
3. In the **Generic Info** section, fill in the fields.

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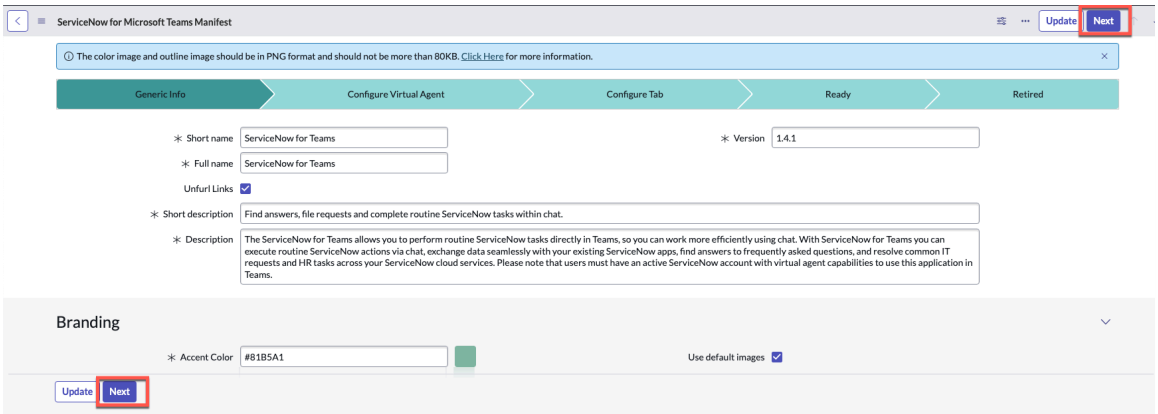
Generic Info Form

Field	Description
Short name	Short name for the manifest file.
Full name	Complete name for the manifest file.
Version	Version of the manifest file. For example, `1.0.0`.
Unfurl Links	Option to unfurl the links in Microsoft Teams. Link unfurling generates a content-rich preview(adaptive card) when a supported link is shared in a conversation with a user in Microsoft Teams. For more details about link unfurling, refer Unfurl the web links in Microsoft Teams chat.
Short description	Short description about the manifest file.
Description	Detailed description about the manifest file.
Accent Color	Custom color for the conversations in Microsoft Teams according to the company branding. The accent color must be in the HTML color code format.
Use default images	Option to use the default images for branding. **Note:** If you want to customize the company branding, clear the **Use default images** option and then upload the icons. For more information on the size of icons, see App icons and manifest schema icons.

4. Select **Submit**.
5. Select **Next**.



The **Configure Virtual Agent** section opens

6. In the **Configure Virtual Agent** section, select either of the following options.

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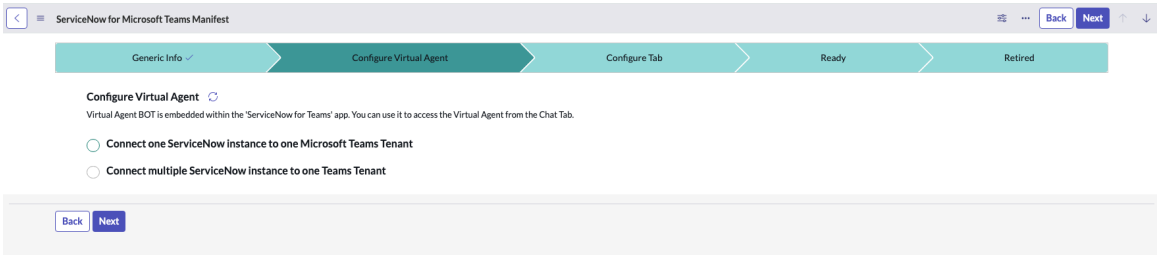
- Select **Connect a single ServiceNow instance to your Microsoft Teams Tenant** to connect one ServiceNow instance to a Microsoft Teams tenant. The Virtual Agent Bot ID is auto-populated when you select this option. This is applicable for pre-published apps. For more information, see Create and download the manifest file for pre-published apps.
- Select **Connect multiple ServiceNow instances to your Microsoft Teams tenant** to connect multiple ServiceNow instances to one Microsoft Teams tenant.



To configure the Virtual Agent in your instance, select **Configure Virtual Agent**. For more information, see Conversational Integration with Microsoft Teams.

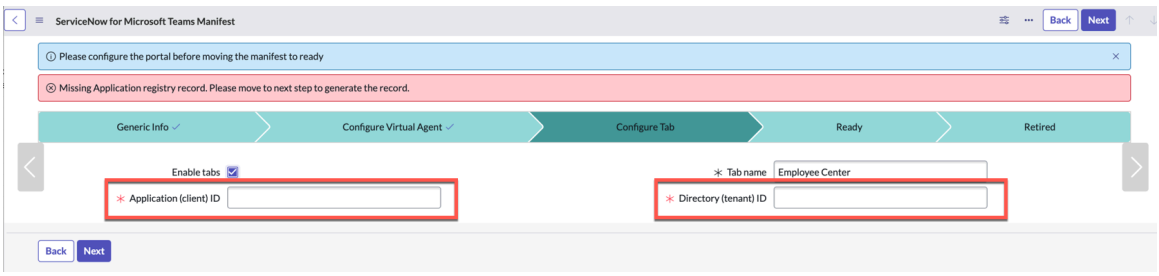
To integrate Virtual Agent with Microsoft Teams by configuring your own bots, see Integrating Virtual Agent with Microsoft Teams using the self-configured bot.

7. In the **Configure Tab** section, fill in the fields.

Configure Tab form

Field	Description
Enable tabs	Option to add tabs in the Microsoft Teams application. This option is selected by default.
Tab name	Name of the service portal tab that appears in the Microsoft Teams application.
Enable Activity Feed	Option to enable the activity feed to receive campaign notifications in Microsoft Teams. This option is selected by default.
Application (client) ID	The client ID of the Azure app.
Directory (tenant) ID	The tenant ID of the Azure app.

For a self-configured app, you must provide the Application (client) ID and Directory (tenant) ID in the **Configure Tab** section. The Tenant ID and Client ID (App ID) can be fetched from the Azure portal.



8. Select **Next**.
   The **Ready** section opens.

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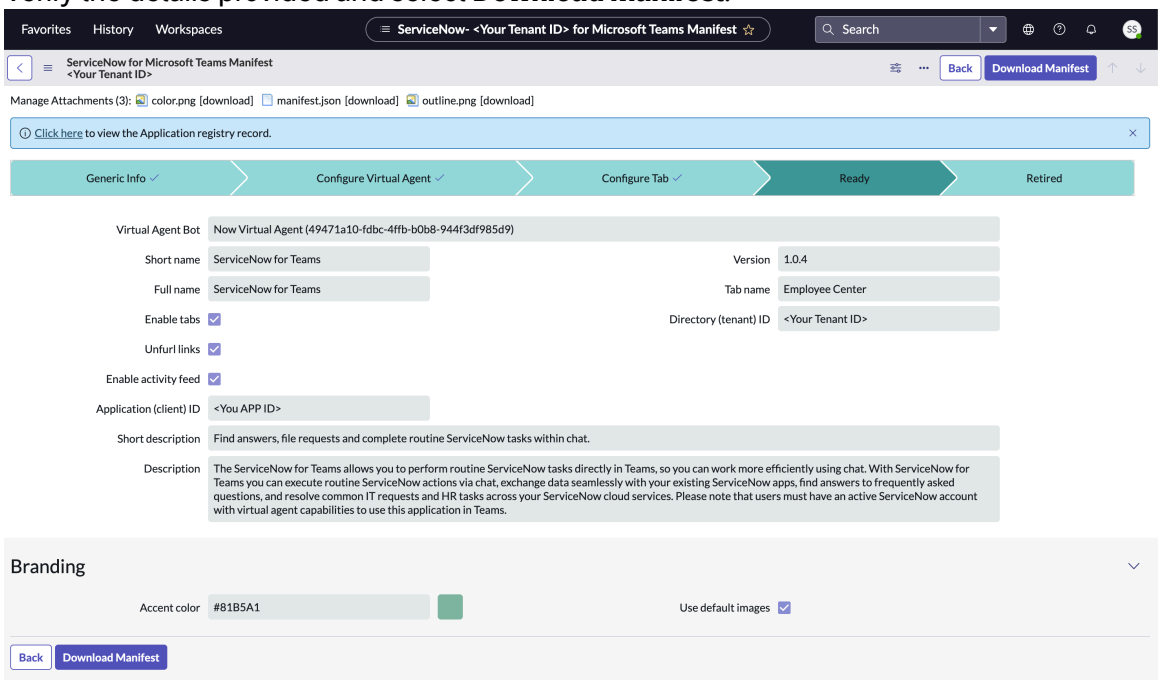
9. In the **Ready** section, select the **Enable Activity Feed** option to receive notifications for campaigns.
10. Navigate to the Application registry record and view the OIDC Provider Configuration record.
    - Select the link in the information message at the top of the page.
    - Navigate to **System OAuth** > **Application Registry** and select **Azure AD - <Tenant-ID>**.

    The User Claim is part of the *id_token* that is fetched from Microsoft Entra ID (Entra ID). The **User Field** must be configured so that the value fetched from the User [sys_user] table matches the User Claim value.

    Note: If none of the configured fields match the User Claim value, you can create a custom field and enter the required value.

11. Verify the details provided and select **Download Manifest**.



The manifest file is downloaded in the zip format and an application registry is created.

What to do next

You must upload the manifest file in Microsoft Teams. For more information, refer Upload manifest file in Microsoft Teams.

Upload manifest file in Microsoft Teams

Upload the manifest file in Microsoft Teams to integrate Microsoft Teams with your ServiceNow instance.

Before you begin

Make sure that you have the manifest file for self-configured apps. For more information, see Create and download the manifest file for self-configured apps.

Role required: admin

Procedure

1. Launch the Microsoft Teams application.
2. Navigate to **Apps** > **Upload a customised app**.

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Note:

Ensure that ServiceNow for Microsoft Teams is allowed as a third-party app in Microsoft Teams. For information about allowing apps in Microsoft Teams, see the Microsoft Teams documentation.

3. Navigate to the location where the manifest file is downloaded and select the zip file.
4. Select **Open**.

   The **ServiceNow for Teams** appears in the **Apps** screen.

5. Select the **ServiceNow for Teams** app.
6. Select **Add**.

   The ServiceNow for Teams app appears in Microsoft Teams.

   - **Chat**: Begin your conversation with the Virtual Agent to get help.
   - **Employee Center**: Select the **Employee Center** tab to view the organization updates and the status on your tasks and requests.

Note: If you don't want to create a manifest file, you can edit an existing manifest file as required. After updating the existing manifest file, you can download and upload the manifest file in Microsoft Teams to make the changes effective.

Update the app ID in the ServiceNow instance

Update the ServiceNow for Teams app ID from the Microsoft Teams admin center in your ServiceNow instance.

Before you begin

Role required: admin

Procedure

1. Log in to the Microsoft Teams admin center.
2. Navigate to **Teams apps** > **Manage apps**.
3. Select the **ServiceNow for Teams** app.
4. Copy the App ID value.

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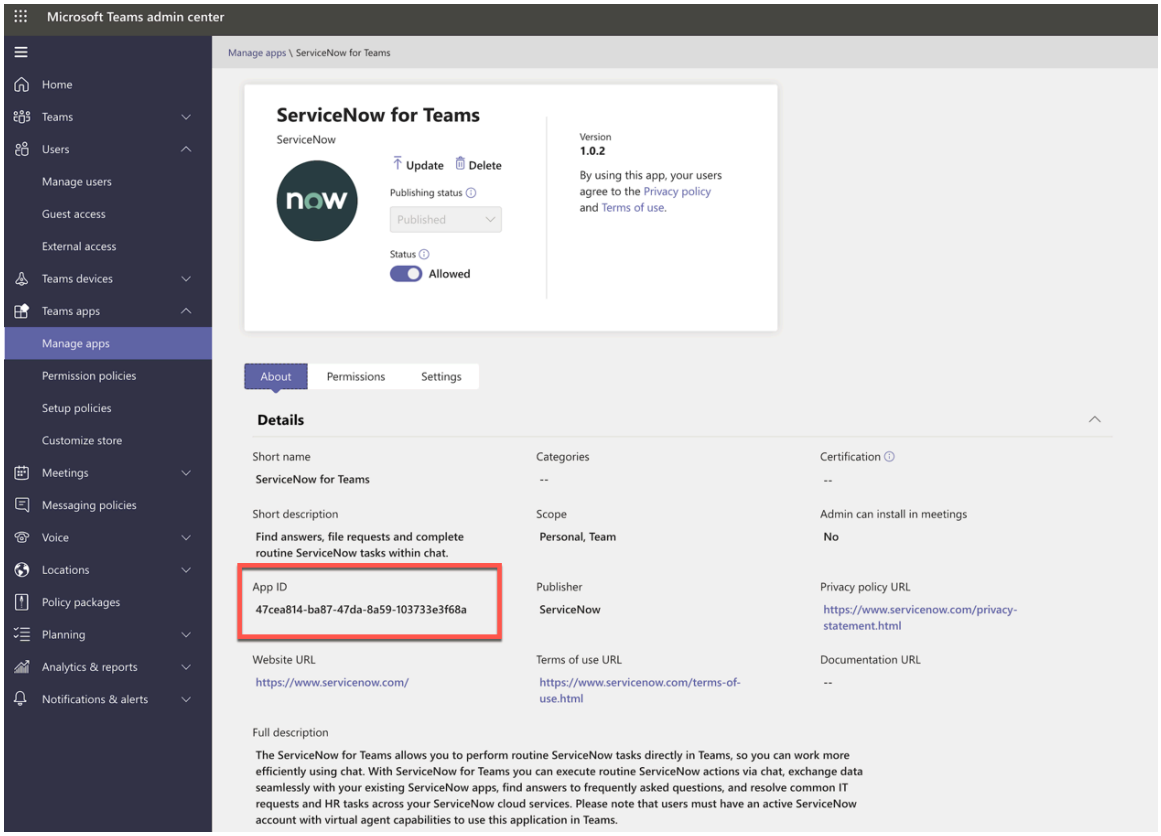
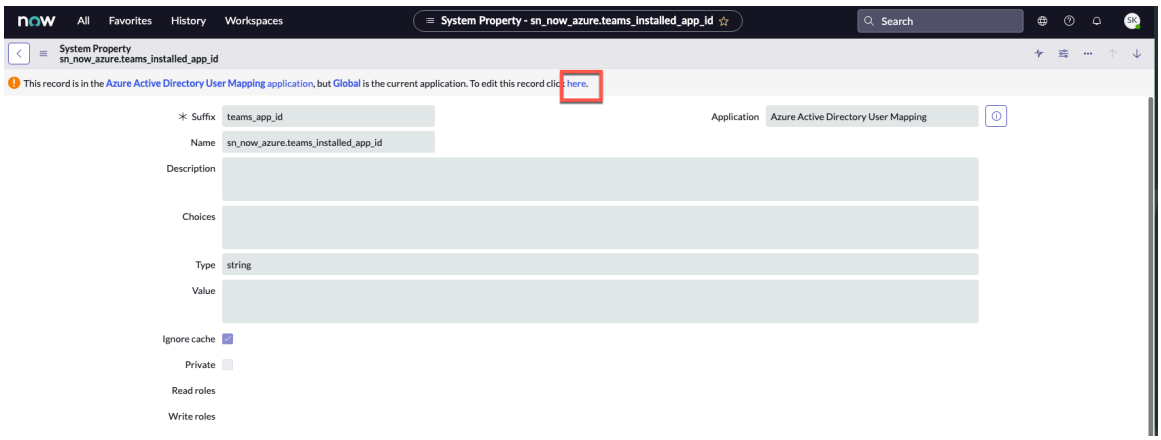


5. In your ServiceNow instance, search for `sys_properties.list`.
6. Select the `sn_now_azure.teams_installed_app_id` property.



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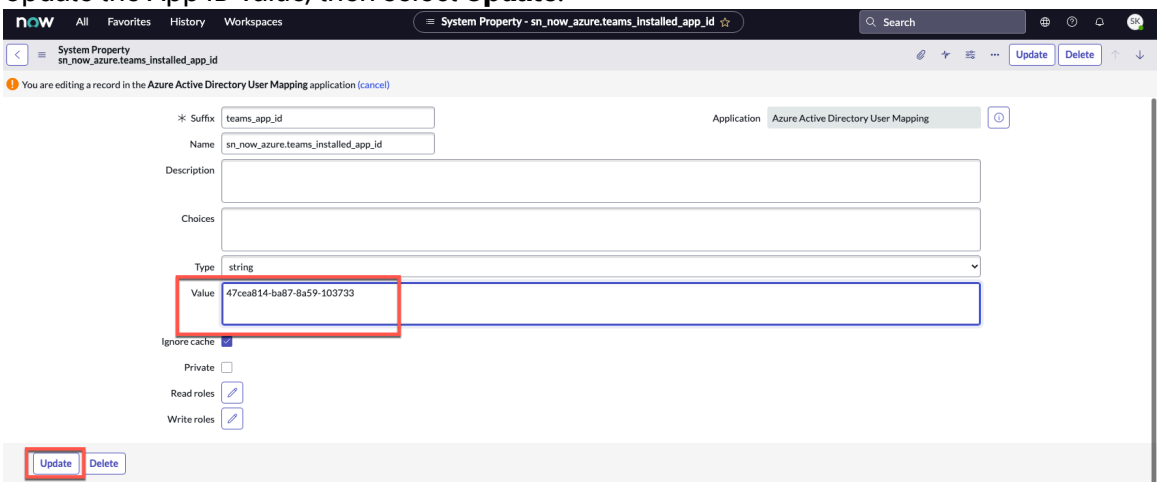
7. Update the App ID value, then select **Update**.



Disable the Now Virtual Agent

Disable the Now Virtual Agent app to avoid duplicate notifications from Microsoft Teams when you install and integrate ServiceNow for Microsoft Teams with your ServiceNow instance.

Before you begin

Note: Your employees will not see or use the Now Virtual Agent app.

Role required: Microsoft Teams admin

About this task

ServiceNow has two apps available for Microsoft Teams:

- Now Virtual Agent

  This app displays the Virtual Agent within Microsoft Teams, has been available within Microsoft Teams app since 2019.

- ServiceNow for Microsoft Teams

  ServiceNow for Microsoft Teams is a new app that provides a broader employee experience, including and expanding beyond Virtual Agent, with an embedded portal experience called **Employee Center**, and the ability for agents to reach out to employees in Microsoft Teams to quickly resolve open tickets.

Since the same Bot (Virtual Agent) is shared in both apps, blocking the Now Virtual Agent app also results in the same bot ID being blocked for the ServiceNow for Microsoft Teams app, making the Virtual Agent unusable in the ServiceNow for Microsoft Teams app. To work around this issue, it is necessary to make sure that the Now Virtual Agent app is in the list of allowed apps.

You must first block the Now Virtual Agent app, so it stops showing up for employees and then add the app to the allowed list. After this configuration, your employees will not see or use the Now Virtual Agent app, but will be able to use Virtual Agent within the ServiceNow for Microsoft Teams app.

Note: It may take up to 24 hours for the changes to be propagated.

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Procedure

1. Log in to the Microsoft Teams admin portal.
2. Navigate to **Teams apps** > **Manage apps**.
3. In the search field, enter `Now Virtual Agent`.
4. Select the **Now Virtual Agent** app.
5. Select **Actions**, then select **Block app**.

Translate the Microsoft Teams manifest file

ServiceNow for Microsoft Teams supports localization to multiple languages, using UTF-8 for international characters.

You must activate the localized plugins in your instance. To install the language plugin, see Activate a language.

After installing the language plugin, you must create and download the manifest file and upload the file to Microsoft Teams. To download the manifest file, refer Create and download the manifest file for pre-published apps.

Working on campaigns in Microsoft Teams

Campaigns in Microsoft Teams enable you to set up and package your content into a campaign to deliver the right message to the required audience at the right time.

You can create a campaign for Microsoft Teams from the Content Experience Builder or by publishing content directly. The Campaign Experience Builder provides a simple, single-page view for managing content and assembling your campaign.

You must have the following plugins installed in your environment:

- Employee Center Pro (com.snc.employee_center_pro) plugin, which enables the Campaign for Content Experiences feature.
- Content Experiences [sn_ca] plugin

For more information about campaigns, see Campaigns for Content Experiences.

Authenticate users with additional permissions to send campaign notifications in Microsoft Teams

Assign additional Microsoft Azure permissions to users to enable Microsoft Teams create and send new campaign notifications on the user's behalf in the teamwork activity feed.

Before you begin

Role required: admin

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **App Registrations**.
3. Open the Microsoft Azure application for self-configured app if it is already created, else create it.
4. Navigate to **API Permissions** > **Add a permission** > **Microsoft Graph**, and click **Application permissions**.
5. Select **TeamsActivity** accordion, and select **TeamsActivity.Send** check box.

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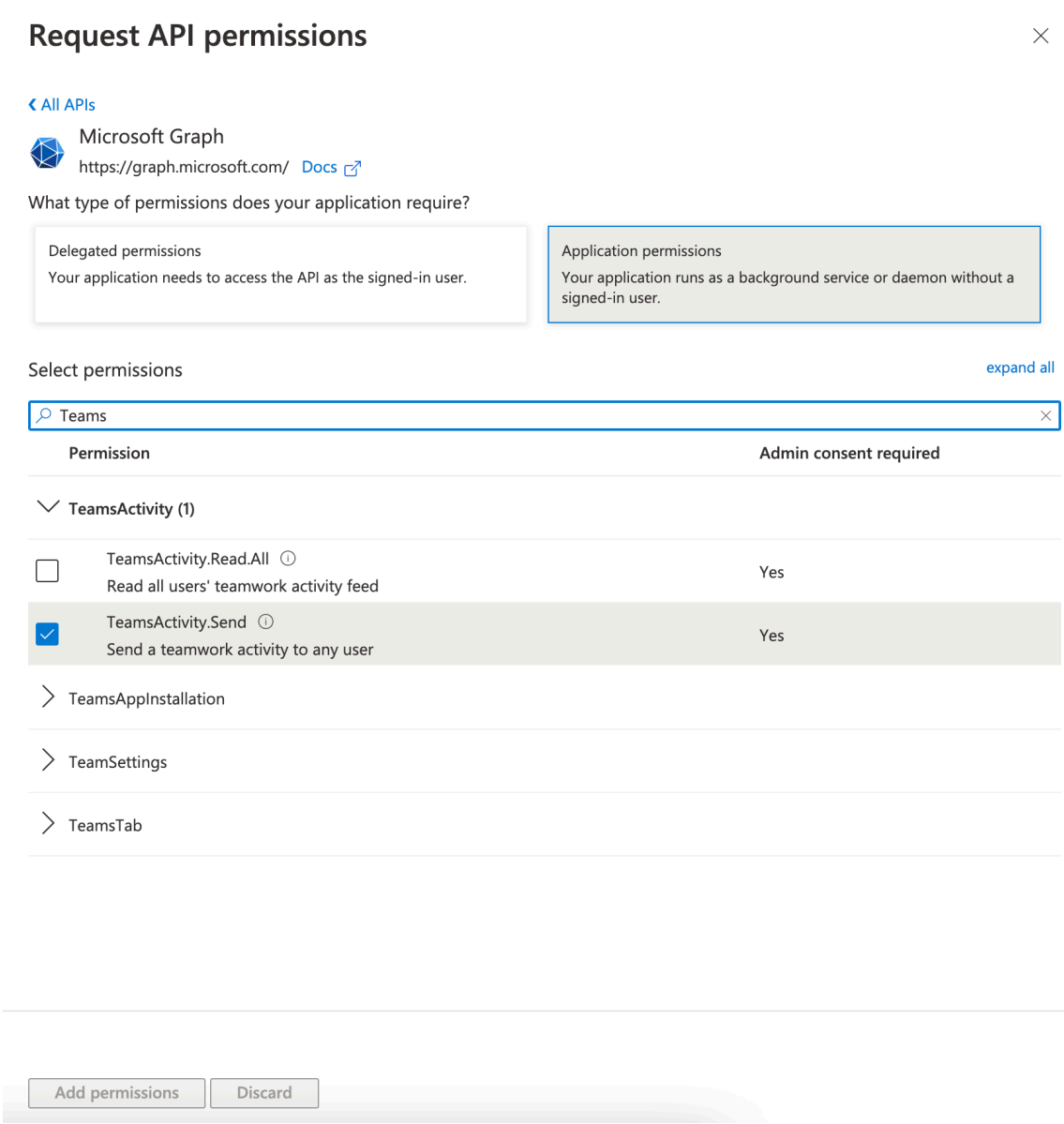

6. Select **Add permissions**.
7. On the API permissions screen, select **Grant admin consent for {tenant}** link, and then select **Yes** on the pop-up dialog box.
8. Regenerate and upload the manifest file in Microsoft Teams.
   For more information, see Send campaign notifications automatically in Microsoft Teams.
9. Register the Request-based chat app in your instance to use Microsoft Teams chat on a self-configured app environment.
   For more information, see Configure Application Registry on the ServiceNow instance.

Send campaign notifications automatically in Microsoft Teams

Automatically send campaign notifications in Microsoft Teams for better collaboration and efficient communication.

Before you begin

A manifest file to enable the campaign notification display in *Microsoft Teams* must exist.

If the configured Employee Center version is v.24 or above, then the Employee Center tab is present by default in your *Microsoft Teams* application. If the Employee Center version is lower than v.24, you must update the value of the portal in the

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`sn_now_teams.portal.suffix` property to `esc`. This value enables Employee Center in your instance.

Role required: admin

About this task

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **ServiceNow for Teams**.
2. Select **New**.
3. Fill in the details in the **Generic Info** section.
   Select **Submit** and then select **Next**.
4. Fill in the details in the **Configure Virtual Agent** section and select **Next**.
5. In the **Configure Tab** section, verify that **Enable activity feed** is selected and select **Next**.

   Note: If you are modifying the base system manifest file, select **Enable activity feed** to receive notifications for campaigns.

6. Verify the details in the **Ready** section and select **Download Manifest**.

   Manifest file downloads in the zip format.

7. Upload the manifest file in Microsoft Teams.

   For more information about creating a manifest file, see Create and download the manifest file for self-configured apps. For more information about uploading a manifest file, see Upload manifest file in Microsoft Teams.

Create a Microsoft Teams campaign using direct content publishing

Create and distribute the Microsoft Teams campaigns using direct content publishing if you have the admin role.

Create notification content for Microsoft Teams

Create notifications to send messages directly to your employees through Microsoft Teams.

Before you begin

- Install the necessary plugins
- Role required: sn_cd.campaign_manager
- A Microsoft Teams notification includes a link Create a video, URL, or to-do link

Procedure

1. Navigate to **All** > **Content Publishing** > **Content Library**.
2. Either use an existing content record or create a notification.

Record source	Action
Existing content record	Select the content record from the list.

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Record source	Action
New content	**a.** Select **New**. **b.** Select **Notification** in the **Select the Plat form** column. **c.** Select **Microsoft Teams**. **d.** Select **Continue**.

3. On the form, fill in the fields.

Notification Content form

Field	Description
Title	Title of the notification. The title is not the subject of the notification, although they can be identical. The default value is the app name provided in the manifest file. The value is appended with the phrase "posted a new campaign".
Subject	Subject of the notification, similar to the subject line in an email.
Description	Brief description of the notification.
Employee Center URL	The link to the video, web page, or to-do item that the notification directs the user to.
Content type	Option to select the type of notification that you want to send. This field is automatically set to Microsoft Teams.
Active	Option to indicate that the notification is active and available.

4. Save the settings and return to the Content list.
   - To save new content and settings, select **Submit**.
   - To save existing content settings, select **Update**.

What to do next

Make the content available to users: Schedule delivery of Microsoft Teams notification content.

Alternatively, you can build out a more robust publishing configuration using Creating campaigns

Schedule delivery of Microsoft Teams notification content

Schedule posting of notifications in the Microsoft Teams channels.

Before you begin

Role required: sn_cd.content_manager, admin

Procedure

1. Navigate to **All** > **Content Publishing** > **Schedule Content**.
2. Select the content to schedule.
3. From the Schedule Content related list, select **New**.

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4. On the form, fill in the fields.
   For more information, see Schedule content form for Microsoft Teams notifications.
5. Select **Submit**.

Schedule content form for Microsoft Teams notifications

Complete the Schedule content form to schedule the posting of notifications in Microsoft Teams channels.

Schedule content form

Field	Description
Content	Content or information you want to make available to employees.
Title	Name for the schedule content record. This field is automatically set to the name of your content selected in the **Content** field.
Active	Option to indicate that the schedule for content is active and available to employees.
Add Users	Option to indicate that you want to add specific users to view your content. Selecting this option clears the values in the **Audience** field.
Audience	Names of the users from the list who you want to see the content.
Approvers	Names of the users to approve the content before it is publicly available. **Note:** This field can contain only the users with the Content Approver [sn_ca.content_approver] role.
When to process	Date and time on which you want the content to be sent, created, or posted.
Content status	The status of your to-do content. • Pending: The Content Publishing scheduled jobs have not processed the content. • Scheduled: The content is scheduled and is queued to be processed. • Max Exceeded: The scheduled content exceeded the allowable time.

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Schedule content form (continued)

Field	Description
	The maximum value is configured in the *sn_cd.todo.max_run_time* property. • Error: An error in scheduling or posting the content occurred.
Completed on	The date and time the Content Publishing: Create To-dos scheduled job completed.

Create Microsoft Teams campaigns using the Content Experience Builder

Create campaigns using the Content Experience Builder if you have the admin role to distribute content to employees.

Create Microsoft Teams notification content from Content Experience Builder

Create or place notification content into a bundle or stage for a Microsoft Teams campaign using Content Experience Builder.

Before you begin

Role required: sn_ca.campaign_manager or sn_cd.content_admin or admin

Procedure

1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information, see Campaign form in Content Experience Builder.
4. Select **Submit**.

Result

The list of all campaigns is displayed.

Campaign form in Content Experience Builder

Fill in the Campaign form to create the Microsoft Teams notification content using the Content Experience Builder.

Campaign form

Field	Description
Title	Unique name for the campaign.
State	State of the campaign.

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Campaign form (continued)

Field	Description
	• Draft: The campaign is in the creation process. When content and bundles are attached to the campaign, the **Publish** button appears in the form header. • Published: Activates all content for an audience. • Editing: The campaign is being edited.
Audience	Names of the users from the list who you want to see the content.
Approvers	User responsible for approving the campaign.
Start time	Date and time the campaign should launch.
End time	Date and time the campaign should end.
Re-evaluate campaign	Option for reviewing the audience for a campaign. If the box is cleared, the *Content Experiences: Update Campaign Audience* scheduled job runs one time, after which the targeted audience is never re-evaluated or changed. Option to display the **Re-evaluate frequency** field so you can define how often you want the *Content Experiences: Update Campaign Audience* scheduled job to run. When your campaign is re-evaluated, the users dependent on the current audience criteria are removed or added.
Re-evaluate frequency	Frequency, in days, that you want to re-evaluate the audience. Audiences are re-evaluated after the *Content Experiences: Update Campaign Audience* scheduled job runs based on the value you enter here. This field appears only if the **Re-evaluate campaign** check box is selected. This field value overrides the default (7 days) value set in the **Campaign Re-evaluation** field in the Content Experiences system property. For more information, see Properties installed with Content Experiences.
Description	Descriptive information about the campaign.

Create Microsoft Teams campaign stages using the Campaign Builder Experience

Use the Campaign Experience Builder to create stages for your campaign. Campaign builder provides a simple, single-page view for managing content and assembling your campaign.

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Before you begin
Role required: sn_ca.campaign_manager or sn_cd.content_admin or admin

About this task
For information about campaigns and campaign bundles/stages, see Creating campaigns.

Procedure
1. Navigate to **All** > **Content Experiences** > **Content Experience Builder**.
2. Select the campaign.
3. From the Campaign Bundles related list, select **New**.
4. On the form, fill in the fields.

Campaign bundle form

Field	Description
Title	Name of the campaign bundle.
Campaign	Option to choose a campaign that is associated with the campaign bundle.
Trigger type	Option to choose a trigger type that determines how the campaign bundle starts or ends.
Offset trigger start	Enables you to move the end date forward or backward from the value in the **Trigger type** field.
Specify end	Indicates whether you want the campaign bundle to have a specific end.
Description	Brief description for the campaign bundle.

5. Select **Submit**.
6. From the Campaign Content related list, select **New**.
7. On the form, fill in the fields.

Campaign content

Field	Description
Content	Description of the content record.
Campaign Bundle	The campaign bundle to associate with the content.
Title	Title for the campaign content. This value is automatically updated as per the value in the Content field.
Active	Option to indicate that the schedule for content is active and available to employees.
Description	Brief description about the campaign bundle.

8. Select **Submit**.
9. On the Campaign form, select **Publish**.

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Result
The campaign is delivered to the employees on the scheduled job timeline.

Translation support for Microsoft Teams notification campaigns

ServiceNow for Microsoft Teams supports localization to ServiceNow supported languages in campaigns.

ServiceNow translates campaign content into the user-specific language set in your ServiceNow instance. If you have not set a user-specific language, the Microsoft Teams application delivers campaign content in the default global language set on your system.

You must activate the localized plugins in your instance to use this feature. For more information about plugins and installing the language plugin for ServiceNow supported languages, see Activate a language.

For more information about language settings for an instance, see Set default language for an instance and User specific language.

For more information about creating campaigns, see Create a Microsoft Teams campaign using direct content publishing and Create Microsoft Teams campaigns using the Content Experience Builder.

For more information about scheduling and executing a job, see Scheduled jobs.

Note: The **Title**, **Subject**, and **Description** field labels in the Notification content form are translated. For more information, see Create notification content for Microsoft Teams.

Register and configure the Request-based chat application on the Microsoft Azure portal

Create a Microsoft Azure application in Microsoft Azure portal to enable agents to import the conversations from Microsoft Teams to ServiceNow.

Before you begin
Role required: admin

Note: You can use one Microsoft Azure application if you use both **IT Service Management integration with Microsoft Teams**, and **HR Service Delivery integration with Microsoft Teams** applications.

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. Select **New registration**.
   The **New registration** page displays.
4. On the **New registration** form, perform the following actions:
   a. Name: Enter the name of your application. `Example: Request based chat app.`
   b. Redirect URI: Enter `https://<instance-name>/oauth_redirect.do`, where `<instance-name>` is the name of your ServiceNow instance.
   c. If you're prompted to select a supported account type, select **Accounts in any organizational directory**
5. Select **Register**.
6. Select **Redirect URIs**.

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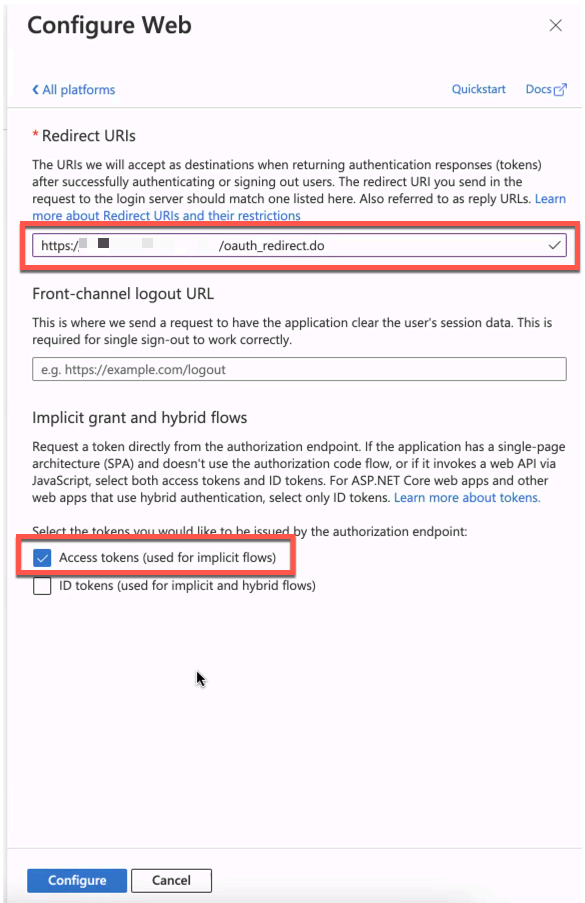
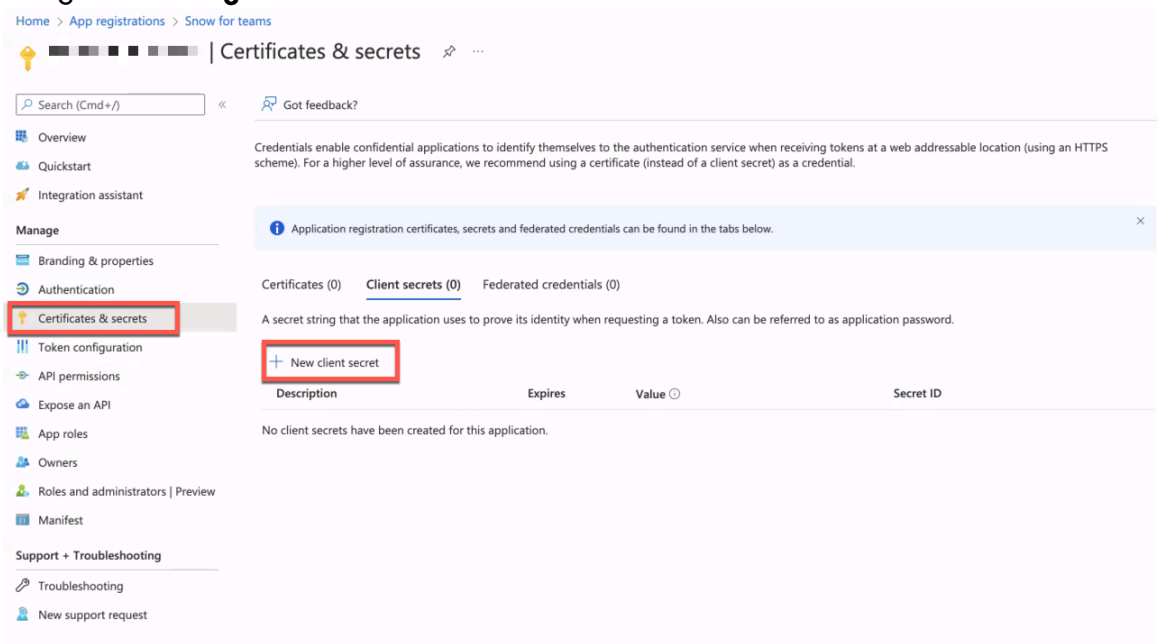


7. Select the **Access tokens** check box.
8. Select **Configure**.
9. Navigate to **Manage** > **Certificates & secrets**.



10. Select **New client secret**.

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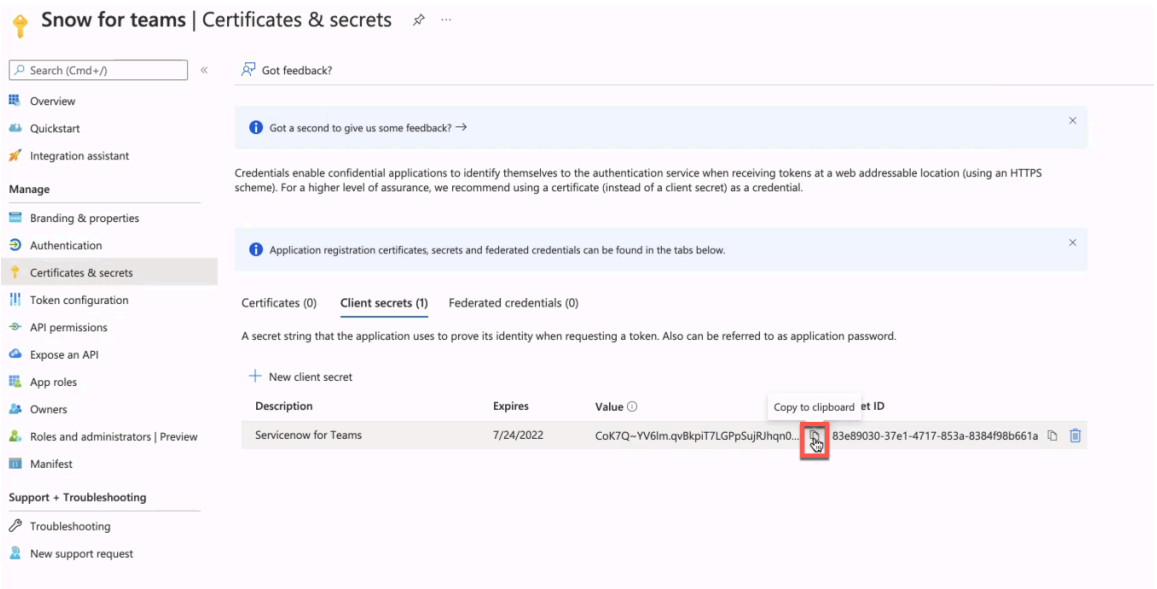
11. On the Add a client secret form, fill the fields.

a. Description: Provide the description for the client secret.

b. Expires: Select the expiry date for the client secret using the drop-down menu.

c. Select **Add**.

d. Copy and save the client secret in a notepad.



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Add permissions to the Microsoft Azure application

Assign permissions to users to enable them to start chat and import chat conversations with employees from Microsoft Teams to ServiceNow® instance.

Before you begin

Role required: Microsoft Azure admin

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. Select the app that is created to enable agents to import the conversations from Microsoft Teams to the ServiceNow instance.
   Example: `Request based chat app`.
4. Navigate to **Manage** > **API Permissions** > **Add a permission** > **Microsoft Graph**.
5. Select **Delegated permissions**.
6. In the **Select permissions** field, enter the following permissions.
   - Offline_access (delegated): ServiceNow stores an access token for each user, which enables them to reauthenticate with ServiceNow, within Microsoft Teams, without having to go through a login prompt. Offline access enables you to refresh the access token automatically.
   - Chat.ReadWrite (delegated): The Read part of the Chat.ReadWrite permission enables you to import request-based chats from Microsoft Teams. The Write part of the Chat.ReadWrite permission is used in the “Start Chat” screen, where an opening message is provided on behalf of the agent.
   - User.Read (delegated): This permission is added when an app is created to read the basic information of a user like the name and email-id.
   - User.ReadBasic.All (delegated): This permission is required to obtain the names and Azure IDs of users. ServiceNow stores the Azure ID to create chats and import chats on behalf of users.
   - Files.Read.All (delegated): This permission is used when request-based chats are imported from Microsoft Teams. It enables attachments to be imported as part of the Teams chat.
   - ChatMember.ReadWrite (delegated): When a request with a Teams chat is set to inactive, participants are automatically removed from the corresponding chat. This permission is required to remove the chat participants.
   - Chat.Create (delegated): This permission is used to create request-based chats.
   - Chat.ReadBasic (delegated): This permission is used when request-based chats are imported. It enables you to display which participant sent each message in the chat.
   - Presence.Read.All(delegated): This permission is used to fetch a user's presence status from Microsoft Teams.
7. Select **Add permissions**.
8. In the **API permissions** screen, select the **Grant admin consent for {tenant}** link.
9. Select **Yes** on the pop-up dialog box.
10. **Optional:** After upgrading an Azure application, remove the user tokens and reauthorize the users to fetch a token with the added permissions.

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a. Log in to your ServiceNow instance.

b. Navigate to **All** > **System OAuth** > **Manage Tokens**

c. Remove the user tokens for the single tenant chat app.

Note: Users must log in to their Microsoft Azure active directory account to fetch a token with the added permissions.

Configure Application Registry on the ServiceNow instance

Register the Request-based chat app in your instance to use Microsoft Teams chat for self-configured app environment.

You can register the Request-based chat app in your instance to use Microsoft Teams chat for self-configured app environment using one of the following methods.

- Edit existing Microsoft Teams Chat self-configured app application registry (Recommended)
- Create an application registry for Microsoft Teams chat self-configured app

Edit existing Microsoft Teams Chat self-configured app application registry

Register the Request-based chat app in your instance to use Microsoft Teams chat for self-configured app environment by editing existing Microsoft Teams Chat self-configured app application registry.

Before you begin

Role required: oauth_admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Search and select **Microsoft Teams Chat Single Tenant** application registry.
3. Fill in the details **Client ID** and **Client Secret** on the form.
4. Select **Save**.
5. **All** > **ServiceNow for Microsoft 365** > **Properties**
6. Enable the option **Set this property to true to use integration hub action for Start Chat / Import chat flows** on the ServiceNow for Microsoft Teams properties form
   The OAuth profile property **Sys ID of OAuth profile for single tenant setup** is set to default (OOB) when shipped with application registry.
7. Select **Save**.

Create an application registry for Microsoft Teams chat self-configured app

Register the Request-based chat app in your instance to use Microsoft Teams chat for self-configured app environment by creating a Microsoft Teams Chat self-configured app application registry.

Before you begin

Note: Use this procedure only if it is absolutely required.

Role required: admin

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Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. Select#**Connect to a third party OAuth Provider**.
4. On the form, fill in the fields.

Application Registries - Microsoft Teams Chat for Single Tenant

Field	Description
Name	Name to uniquely identify the record. For example, enter: Microsoft Teams chat self-configured app
Client ID	Client ID created in Azure portal. Provide the value of the Azure application ID in this field.
Client Secret	The password you generated when creating the app in Microsoft Teams. For more information, see Register and configure the Request-based chat application on the Microsoft Azure portal.
Authorization URL	Authorization URL that includes the tenant ID of your app with the format https://login.microsoftonline.com/{tenantid}/oauth2/v2.0/authorize where is the tenant ID created during the app creation in Microsoft Teams.
Token URL	Token URL that includes the tenant ID of your app with the format https://login.microsoftonline.com/{tenantid}/oauth2/v2.0/token where is the tenant ID created during the app creation in Microsoft Teams.
Redirect URL	Redirect URL that includes the instance URL with the format https://<instanceURL>/oauth_redirect.do Update the <instanceURL> value with your instance URL.

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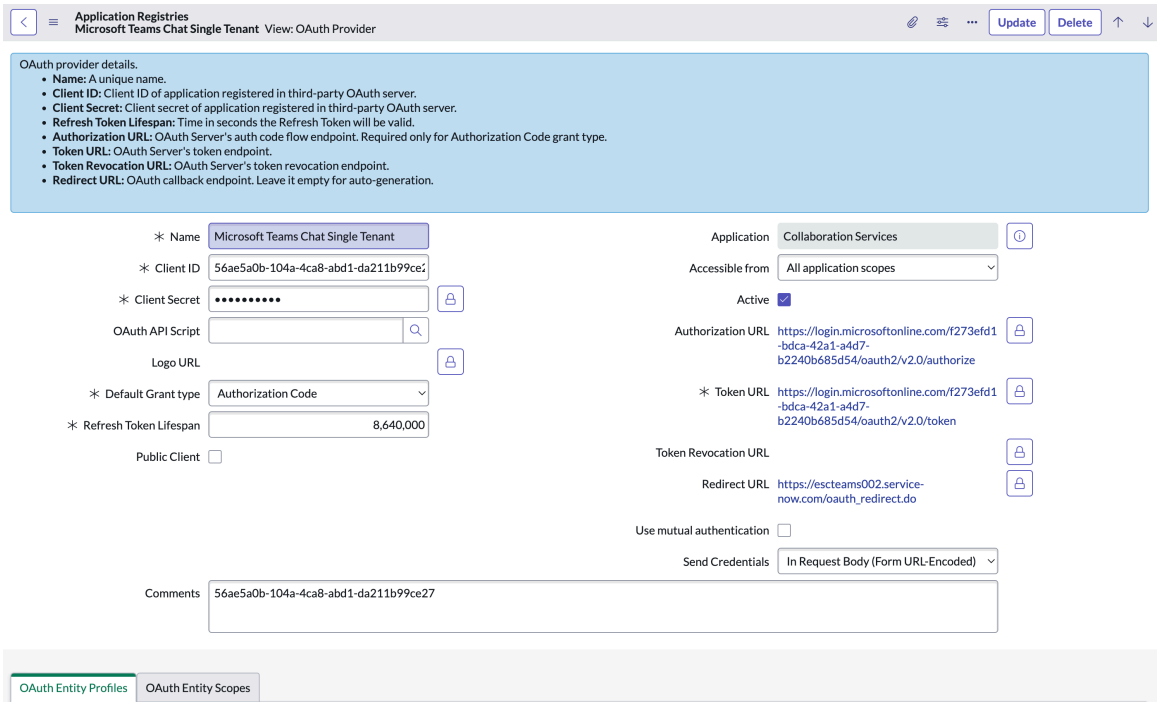

5. Select **OAuth Entity Scopes** related list.
6. Add the following scopes.
   - Enter `Default` in **Name** and enter `.default` in **OAuthscope**.
   - Enter `Offline Access` in **Name** and enter `offline_access` in **OAuthscope**.
7. Select **Save**.
   System generates an OAuth Entity profile.
8. See OAuth Entity Profile details in the related list **OAuth Entity Profiles**.
9. Open the OAuth Entity Profile record and copy the Sys ID.
10. Navigate to **All** > **ServiceNow for Microsoft 365** > **Properties**.
11. Enable the option **Set this property to true to use integration hub action for Start Chat / Import chat flows** on the ServiceNow for Microsoft Teams properties form.
12. Enter the copied OAuth Entity Profile value in the field **Sys ID of OAuth profile for single tenant setup. This needs to be setup if you are setting "sn_tcm_collab_hook.teams_use_ih_actions_for_single_tenant" to true**.
13. Select **Save**.

Request-based chat access for a guest user

Request-based self-configured app chat access enables a guest user to start and import chats in a single ServiceNow® for Microsoft Teams instance.

Guest sharing is enabled by default in Microsoft Entra ID and in ServiceNow for Microsoft Teams. As a result, users can invite guests to teams and sites, and share files with guests without having to request assistance from the IT department.

Guests can take the following actions:

- Initiate a chat with people from outside their organization.
- Import their chat conversations with people from outside their organization.

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For information about configuring access for guest users, see Guest access in Microsoft Teams.

Guest access configuration is applicable to the following tables in both IT Service Management integration with Microsoft Teams and HR Service Delivery integration with Microsoft Teams applications:

- HR Core task (sn_hr_core_task)
- HR Life events Case (sn_hr_le_case)
- HR Core case (sn_hr_core_case)
- Request Item (sc_req_item)
- Task (sc_task)
- Incident (incident)
- Request (sc_request)
- Change request (change_request)

The ServiceNow system admin can extend guest access to other tables.

Authenticate guest users to initiate and import chat from Microsoft Teams

Assign permissions to guest users to initiate and import chat conversations with employees from Microsoft Teams to a ServiceNow® instance for a self-configured app.

Before you begin

Ensure you have completed the Request-based chat app configuration for a self-configured app. For more information, see:

1. Register and configure the Request-based chat application on the Microsoft Azure portal
2. Configure Application Registry on the ServiceNow instance
3. Add permissions to the Microsoft Azure application

Role required: Microsoft Azure admin

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. Select the Request-based chat app to enable agents to initiate and import the conversations from Microsoft Teams to the ServiceNow instance.
4. Navigate to **Manage** > **API Permissions** > **Add a permission** > **Microsoft Graph**.
5. Select **Application permissions**.
6. In the Select permissions search field, enter `User.Read.All` and select that permission.

   This permission obtains the Microsoft Azure user type value. This value is stored on the ServiceNow instance to enable the creation and importing of chats on the user's behalf.
7. Select **Add permissions**.
8. In the **API permissions** screen, select the **Grant admin consent for {tenant}** link.
9. Select **Yes** in the pop-up dialog box to save the settings.

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Enable authentication of guest users

Verify and update application registry values to authenticate guest users in the Microsoft Teams application to start and import chats for a self-configured app.

Before you begin

Role required: oauth_admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select the Microsoft Teams Chat Single Tenant application registry.
3. On the form, verify and update the fields.

Application Registries form

Field	Description
Name	Name to identify the record. For example, Microsoft Teams Chat self-configured app, Microsoft Teams Chat App Permission ST, and so on.
Client ID	Application ID created in the Microsoft Azure portal.
Client Secret	Password generated during the app creation process in ServiceNow for Microsoft Teams.
Authorization URL	Authorization URL that includes the tenant ID that was generated during the creation of your app in ServiceNow for Microsoft Teams in the following format: `https://login.microsoftonline.com/<tenantid>/oauth2/v2.0/authorize`
Token URL	Token URL that includes the tenant ID of your app that was generated during creation in ServiceNow for Microsoft Teams in the following format: `https://login.microsoftonline.com/<tenantid>/oauth2/v2.0/token`
Redirect URL	Redirect the URL that includes your ServiceNow for Microsoft Teams instance URL in the following format: https://<instanceURL>/oauth_redirect.do

4. Select **Save**.
5. Navigate to **ServiceNow for Microsoft Teams** > **Properties**.
6. Select the option **Set this property to true to use integration hub action for Start Chat / Import chat flows**.
7. Select **Save**.
8. Repeat this procedure for the Microsoft Teams Chat App Permission ST application registry.

Enable chat access for guest users

Enable chat access for a guest user while configuring ServiceNow® for Microsoft Teams settings for a self-configured app.

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Before you begin
Role required: External admin (external_app_install_admin)

Procedure
1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Teams Guest User Chat Configuration**.
2. On the form, fill in the fields.

Teams Guest User Chat Configuration form

Field	Description
Tenant ID	Directory (tenant) ID from the application overview page in the Microsoft Azure portal. Use the ID value to update details in the ServiceNow instance.
Tenant full name	Full domain name of the tenant or host. For example, account1.onmicrosoft.com.
Enable Guest access	Option to enable the Client Credentials token to fetch user type details that were set during the process of Enable authentication of guest users. If you do not select this option, an error occurs when the guest tries to start or import a Microsoft Teams chat. **Note:** When the guest access is enabled, the sn_tcm_collab_hook.MS_Teams_Chat_App_Credentials value in the sys_alias table configured in Connection & Credential Aliases fetches the Azure user details. When the guest access is inactive, the sn_tcm_collab_hook.MS_Teams_Chat_Credentials value in the sys_alias table configured in Connection & Credential Aliases fetches the Azure user details.
Allowed Guest domains	The guest user domains where invited guests can start or import a chat. Only the tenants in these domains can start or import a chat. List multiple guest domain names as comma-separated values.

3. Select **Submit**.

Result
Guests belonging to the selected guest domains can start or import chats.

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User Presence Indicator

User presence indicator helps the agents to know the status of the users in *Microsoft Teams* before the agent can initiate a chat using *Microsoft Teams*.

By default, the agents can view the status of the users when they launch the Start chat modal in the ServiceNow instance.

Ensure that the API permission is added to the already created Request Based Chat application from the Azure Portal, when you are upgrading the application. For more information on required permissions for Request Based Chat, see Add permissions to the Microsoft Azure application.

The system takes 60 minutes to display the user presence status in the start chat modal for the first use when you upgrade to *IT Service Management* integration with *Microsoft Teams* v2.5.0 or Collaboration Services v3.5 applications.

The status of the user from *Microsoft Teams* is mapped into the ServiceNow instance as depicted in the table.

User status mapping

User status in Microsoft Teams	Status shown in Start Chat modal
'Available', 'AvailableIdle'	available
'Busy', 'BusyIdle', 'DoNotDisturb'	busy
'Offline', 'PresenceUnknown'	offline
'Away', 'BeRightBack'	away

The user presence status is cached for 180 seconds, this implies if a user is “online” in *Microsoft Teams*, the Start Chat modal displays the user status as “online” until 180 seconds. If the user status is modified, the system fetches the user status after the interval of 180 seconds and updates the status in the Start Chat modal.

The time interval to cache the user status is configurable by a system property `sn_tcm_collab_hook.teams.presence_status_cache_invalidate_duration`. You can modify the time interval to retain the user presence status. For more information, refer Configure cache duration for the user presence status.

Configure cache duration for the user presence status

You can modify the system property to configure the cache duration to retain the user presence status of the *Microsoft Teams* user.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list` and press **Enter**.

   The entire list of properties in the System Properties [sys_properties] table appears.

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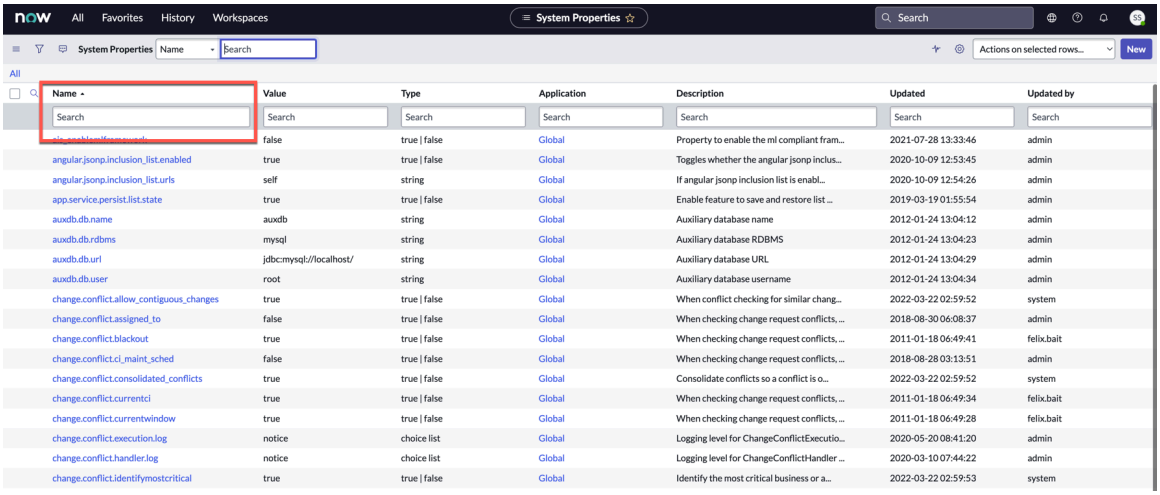
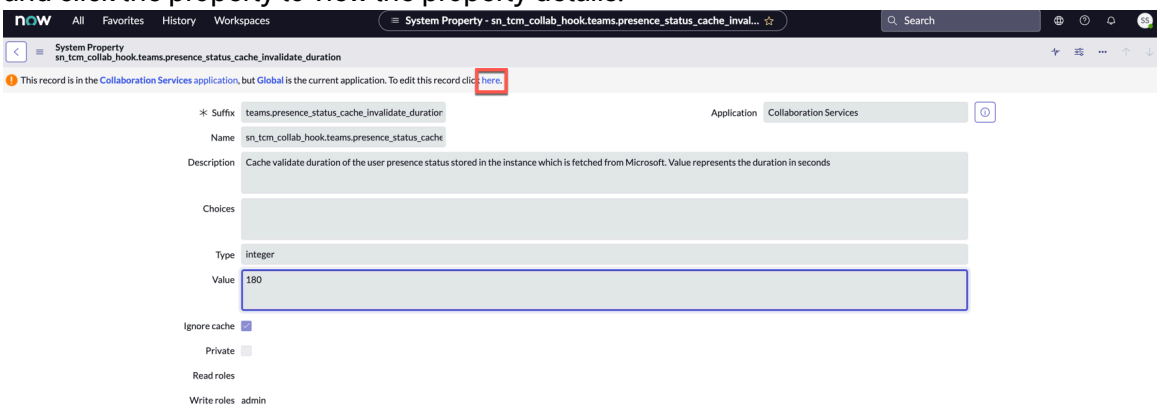


2. In the Name column, search for the system property `sn_tcm_collab_hook.teams.presence_status_cache_invalidate_duration` and click the property to view the property details.



3. Click here to edit the property details.
4. Define the cache duration in seconds to retain the user presence status in the **Value** field.
5. Click **Update**.

Setup for integrating self-configured apps with Microsoft Teams for Agent Experience

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams self-configured app environment.

Integrating Notify connector self-configured app with Microsoft Teams

Set up the Notify connector for Microsoft Teams using the self-configured app.

You might need to use the self-configured app setup due to your company or regulatory requirements.

Create an app in Microsoft Teams to enable making calls

Create an app to make outbound calls from Microsoft Teams.

Before you begin

Ensure you have installed Notify connector and other required plugins on your ServiceNow® instance. For more information, see Install Notify connector for Microsoft Teams.

Role required: Microsoft Teams admin, Microsoft Azure admin

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Procedure

1. Log in to Microsoft Teams developer portal.

   Note:

   The Developer Portal for the Government Community Cloud (GCC) is accessible only through an application within Microsoft Teams. It is not available as a separate, standalone website. For more information, see Developer Portal for Teams. To create an app for GCC, you must create the app from Microsoft Teams.

2. Create an app.

   a. Navigate to **Apps** > **New app**.

   b. Enter a valid name for the app in the Add app pop-up page and select **Add**.

   c. On the App details page, fill in the fields.

   App details page

Field	Description
Short name	Name of your application. For example, ServiceNow for Notify Microsoft Teams.
Full name	Full name of your application.
App ID	Unique identification number for the app. **Note:** This App ID is different from the Bot ID/App ID that will be generated in further steps.
Short description	Brief description of the app.
Long description	Detailed description of the app.
Version	Version for the app. For example, 1.0.
Developer or company Name	Name of your company.
Website	Link to your company website.
Privacy policy	Link to the privacy statement for your app.
Terms of use	Link to the terms and conditions for your app.

   d. Select **Save**.
   An app is created in Microsoft Teams.

3. Create a bot (Notify connector) for the new app.

   a. Navigate to **Configure** > **App features**.

   b. Select **Bot**.

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c. Select **Create a new bot**.

d. Select **New Bot**.

e. Enter a valid name for bot in the Add bot pop-up page and select **Add**.

f. Copy to a notepad the Bot ID value of the new Notify connector using one of the following options and this will be your app Client ID.
   - Copy the ID from the browser URL.
   - Navigate back to **Bots** > **Tools**, and copy the Bot ID.

g. Go to **Channels**, enable **Microsoft Teams**, and select **Save**.

h. Select **Client secrets** and enter a client secret for your bot.
A Client secret is generated.

> **Note:** Ensure you copy the generated Client secret to a notepad because it will not appear again.

4. Copy the Client ID/Bot ID of Notify Connector to the Application (client ID).
   a. Go to **Apps** and select the app you created.
   b. Navigate to **Configure** > **Basic information**.
   c. Paste the Client ID/Bot ID that you copied during step 3f in the **Application (client) ID** field and select **Save**.
5. Configure additional app features for new bot.
   a. Go to **Apps** and select the app you created.
   b. Navigate to **Configure** > **App features** > **Bot** > **Select an existing bot** and select the bot you created.
   c. Select **Support audio calls** and **Support video calls** from 'What can your bot do?'.
   d. Select **Personal**, **Team**, and **Group chat** from 'Select the scopes in which people can use this command'.
6. Copy the new app attributes.

   a. Log in to Microsoft Azure portal as Microsoft Azure admin.

   b. Navigate to **Azure services** > **Azure Active Directory** > **Manage** > **App registrations**.

   c. Search and open the new bot created for Notify Connector by name or by Application (client) ID.

   d. Make a note of client ID/Application (client) ID, Object ID, and tenant ID to update these values in your ServiceNow instance in later procedures.

> **Note:** Bot ID created in the Microsoft Teams Developer portal and Application (client) ID in the Microsoft Azure portal are the same.

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What to do next
Assign permissions to users to access the new bot. For more information, see Manage permissions and authenticate the Notify connector app/bot in Microsoft Azure portal.

Manage permissions and authenticate the Notify connector app/bot in Microsoft Azure portal

Assign permissions to users to be able to authenticate successfully and participate in conference calls in Microsoft Teams.

Before you begin
Role required: Microsoft Azure admin

About this task
You can manage the permissions required by the Notify connector app/bot to perform required actions for conference calls.

Procedure

1. Log in to Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. Search and open the Notify connector bot created in step 3 in the section Create an app in Microsoft Teams to enable making calls by name or by Application (client) ID.
4. Navigate to **Manage** > **API Permissions** > **Add a permission** > **Microsoft Graph** and select **Application Permissions**.
5. Search and select the following values using **Select permissions**, and then select **Add permissions** to grant the permission.
   - **User.Read.All** from User list.
   - **OnlineMeetings.ReadWrite.All** from OnlineMeetings list.
   - **Calls.InitiateGroupCall.All**, **Calls.JoinGroupCall.All**, **Calls.JoinGroupCallAsGuest.All** from Calls list.
6. Grant admins access to the Microsoft Azure applications that require admin approval.
   a. Select **Grant admin consent for <tenant>** in the API permissions page.
   b. Select **Yes** in the Grant admin consent confirmation pop-up page.

Create a Service user to make calls from Microsoft Teams

Create a service user role to be able to start online meetings on behalf of users in Microsoft Teams.

Before you begin
Role required: Microsoft Teams admin

Procedure

1. Log in to Microsoft Azure portal.
2. Create a Service user.
   a. Navigate to **Azure services** > **User**.
   b. Select **New user**.
   c. On the form, fill the fields.

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New user

Field	Description
User name	Option to provide the user name for the user.
Name	Option to provide the name of the user.

d. Select **Create**.

e. Select the created user to view the details.

Note: Ensure that the Service User has the required license/subscription and a valid usage location set to make conference calls from Microsoft Teams.

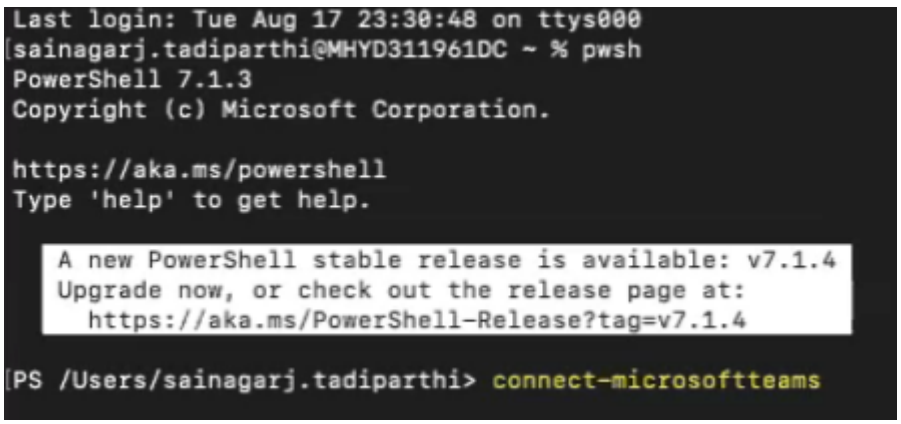
3. Run the PowerShell command from Terminal on macOS or from the Command prompt on Windows OS.

a. Type the command `pwsh` and press **Enter**.

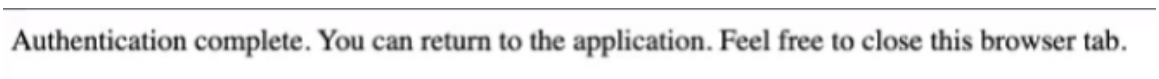
b. Connect your Microsoft tenant with PowerShell.

c. Run the following command in PowerShell.

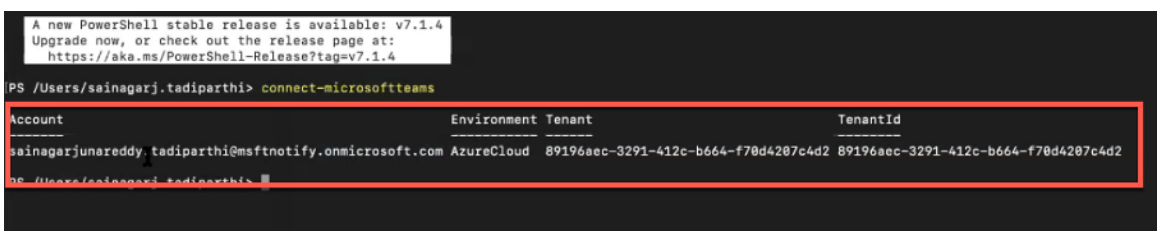
```
connect-microsoftteams
```



Upon successful connection, a confirmation message is displayed in the browser.



PowerShell will also display the tenant details.



4. Run the command below to create a new Application Access Policy in PowerShell.

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Use the bot ID created in step 3 in the section Create an app in Microsoft Teams to enable making calls as the AppId for the command.

For more information on the application access policy, see Configure application access to online meetings.

```
Syntax:

New-CsApplicationAccessPolicy -Identity "<PolicyName (can
 be anything)>" -AppIds "<AppIds>" -Description "<Policy
 Description>"

Example:
If you have a Self-configured (single tenant) setup, use the
 application ID from Azure portal.

For Example: New-CsApplicationAccessPolicy
 -Identity "OnlineMeetingsAccessPolicy" -AppIds
 "aaaaaaaa-1234-er4r-8dc9-123456789012" -Description "Grant
 OnlineMeeting Application Permission"
```



Upon successfully creating the policy, the details are displayed in PowerShell.



5. Run the user permission policy in PowerShell.

   a. Go to the Microsoft Azure portal.

   b. Navigate to **Home** > **Users**.

   c. Select the user created.

   d. Copy the **Object ID** of the user to notepad.

   e. Use the policy name created in the previous step as the **PolicyName** of the command and the **Object ID** as the **UserAzureID** respectively in the command to execute in PowerShell.

```
Syntax:

Grant-CsApplicationAccessPolicy -Identity "<UserAzureID>"
 -PolicyName "<PolicyName>"

Example:
```

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```
Grant-CsApplicationAccessPolicy -Identity
 "fdcd9c17-ceae-468f-906f-2er76b4dd0f4" -PolicyName
 "OnlineMeetingsAccessPolicy"
```



Create a Microsoft Teams application registry entry to connect the created app to ServiceNow instance

Register your Microsoft Teams application with your ServiceNow instance for OAuth authorization.

Before you begin

Role required: oauth_admin

Procedure

1. Log in to your ServiceNow instance.
2. Navigate to **All** > **System OAuth** > **Application Registry**.
3. Select **New**.
4. Select **Connect to a third-party OAuth Provider**.
5. On the form, fill in the fields.
   - Name: Name to uniquely identify the record, for example, Microsoft Teams for Notify Self-configured app.
   - Client ID: Application (client) ID or Bot ID created and copied during the app creation in Microsoft Teams.

     Copy the Application (client) ID from the Microsoft Azure portal. Bot ID created in the Microsoft Teams Developer portal and Application (client) ID in the Microsoft Azure portal are the same. For the Application (client) ID or Bot ID information, see Create an app in Microsoft Teams to enable making calls.

     Do not copy the App ID of the Microsoft Teams app created on the Microsoft Teams Developer Portal.
   - Client Secret: The password you generated when creating the bot in the Microsoft Teams Developer Portal (step 3h).

     For the Client Secret information on the Microsoft Azure portal, see Create an app in Microsoft Teams to enable making calls.
   - Default Grant Type: `Client Credentials`.
   - Token URL: Token endpoint URL that includes the Directory ID of your app with the structure `https://login.microsoftonline.com/<Directory-ID>/oauth2/v2.0/token`, where `<Directory ID>` is the tenant ID created during the app/bot creation in Microsoft Teams Developer Portal. For the tenant ID information in the Microsoft Azure portal, see Create an app in Microsoft Teams to enable making calls.

     Or follow this procedure.

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a. Log in to the Microsoft Azure portal.
b. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
c. Search and open the new bot created for Notify connector by name or by Application (client) ID.
d. Copy the Directory (tenant) ID value.
e. Go to **Endpoints** > **Get the OAuth 2.0 token endpoint (v2)**.
f. Replace `common` with the copied Directory (tenant) ID value.

6. Select **OAuth Entity Scopes** in related list and add a record with the values `Default` in **Name** and `.default` in **OAuthscope**.
7. Set OAuth Entity Profile values.

Note: By default, an OAuth Entity Profile record is created. If it is not available, then you can create one by following these sub-steps.

- Select **OAuth Entity Profiles** in related list.
- Open the created `<>default_profile`record.
- Select **OAuth Entity Profile Scopes** in related list.
- Add a record with the values `Default` in **OAuth Entity Scope** and `<>default_profile` in **OAuth Entity Profile**.
- Select **Update** to save the changes.

Result
The Microsoft Teams app is now registered with an OAuth profile authorization.

Create a Connection & Credentials alias for Microsoft Teams

Create an alias to associate the connection information with the credential data required to complete the application integration in Microsoft Teams.

Before you begin
Role required: admin

About this task
For more information, refer Introduction to credentials, connections, and aliases.

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Credentials Aliases**.
2. Select **MSTeamsCommunicationsSpoke**.
3. Select **New** in the Credentials related list.
4. Select **OAuth 2.0 Credentials**.
5. Set the values for the credentials.

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a. Enter a name for the credential in the **Name** field, for example, `Notify Microsoft Teams credentials for self-configured app`.

b. Enter the OAuth Entity profile information in the **OAuth Entity Profile** field, for example, `<application-registry-name>_default_profile`.
The profile ID is set when you generate the application registry entry.

6. Select **Submit**.

Update the records in the Microsoft Teams Configuration page

Update the created records in Microsoft Teams to make seamless calls.

Before you begin
Role required: Microsoft Teams admin

Procedure

1. Navigate to **All** > **Notify** > **Microsoft Teams** > **Configuration**.
2. On the Microsoft Teams Configuration form, fill in the fields.
   - Credential Alias: Provide `sn_msteams_com_spk.MSTeamsCommunicationsSpoke` in the field.
   - Application registry: Select the Application Registry record created in the section Create a Microsoft Teams application registry entry to connect the created app to ServiceNow instance.
   - Tenant ID: Enter the tenant ID created during the app creation in Microsoft Teams. For the tenant ID information on the Microsoft Azure portal, see Create an app in Microsoft Teams to enable making calls.
   - Requester: Select the Credential alias record created in the section Create a Connection & Credentials alias for Microsoft Teams.
   - Service user Azure ID: Enter the objectId of the service user created in Create a Service user to make calls from Microsoft Teams.
   - Enable create online meeting: Ensure this option is selected.
3. Right-click the form header and select **Save**.

Result
OIDC Application Registry is created.

Verify OIDC Application Registry creation for a self-configured app setup

Verify whether the OIDC Application Registry was created when Microsoft Teams Application Registry was created and mapped to the configuration during a self-configured app setup process.

Before you begin
Role required: oauth_admin

About this task
Mapping a Microsoft Teams Application Registry after creation automatic creates an OIDC Application Registry as a part of the self-configured app setup. If this automatic creation fails, issues occur in processing call backs that might cause meeting information not to be updated in real time.

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For more information, see Create a Microsoft Teams application registry entry to connect the created app to ServiceNow instance and Update the records in the Microsoft Teams Configuration page.

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Filter the list by the Client ID created during the app creation in Microsoft Teams.

   Ensure that there is also an External OIDC Provider type Application Registry for the same Client ID along with the OAuth Provider type created. For the External OIDC Provider type Application Registry information, see Update the records in the Microsoft Teams Configuration page. For the Client ID information on the Microsoft Azure portal, see Create an app in Microsoft Teams to enable making calls.
3. If the Application Registry with External OIDC Provider type for the Client ID is missing, create it manually.

   a. Select **New** on the Application Registries page.

   b. Select **Configure an OIDC provider to verify ID tokens**.

   c. In the **Name** field, enter your OAuth provider name and append `OIDC`.

      For example, if your OAuth Provider name is `MS Teams SC Config`, you would name your OIDC `MS Teams SC Config OIDC`.

   d. Select **Client ID** same as the OAuth Provider value.

   e. For the **Client Secret** value, select **invalid_value**. (This value is not relevant).

   f. For the **OAuth OIDC Provider Configuration** value, select **Notify Teams OIDC Config**.

   g. For the **Redirect URL** valuesas **invalid_value** (This value is not relevant).

   h. Right-click the form header and select **Save**.

   By default, an OAuth Entity profile is created. Ensure the **Grant Type** is **Client Credentials**.
4. Create an OAuth Entity scope.

   a. Select **OAuth Entity Scopes** tab on the Application Registries page.

   b. Double-click **Insert a new row** and enter `Notify MS Teams SC OIDC` appended with `Default Profile`.
   For example, if your OIDC Config name is `MS Teams SC Config OIDC`, then you can enter the name as `MS Teams SC Config OIDC Default Profile`.

   c. Enter `https://api.botframework.com/.default` as the OAuth scope.

   d. Right-click the form header and select **Save**.

What to do next

Configure Notify connector for Microsoft Teams.

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Integrate Meeting Extensions self-configured app with Microsoft Teams

Configure Meeting Extensions for Microsoft Teams using the self-configured app environment.

Ensure you have completed Notify connector for Microsoft Teams integration. For more information, see Integrating Notify connector self-configured app with Microsoft Teams.

Create and configure an app for Meeting Extensions in the Microsoft Teams Developer Portal

Create and configure an app for Meeting Extensions in Microsoft Teams Developer Portal to fetch incident details during the conference call in Microsoft Teams.

Before you begin

Ensure you have installed Notify connector and other required plugins on your ServiceNow® instance. For more information, see Install Meeting Extensions for Microsoft Teams.

Role required: Microsoft Teams admin

Procedure

1. Log in to the Microsoft Teams portal at https://dev.teams.microsoft.com.
2. Create an app.
   a. Navigate to **Apps** > **New app**.
   b. Enter a valid name for the app in the Add app dialog box and select **Add**.
   c. On the App details page, fill in the fields.

App details page

Field	Description
Short name	Name of your application. For example, ServiceNow Meeting Extensions for Microsoft Teams.
Full name	Full name of your application.
Application (client) ID	Unique identification number for the app. **Note:** This App ID is different from the generated Bot ID/App ID.
Short description	Brief description of the app.
Long description	Detailed description of the app.
Version	Version for the app. For example, 1.0.
Developer or company Name	Name of your company.
Website	Link to your company website.
Privacy policy	Link to the privacy statement for your app.

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Field	Description
Terms of use	Link to the terms and conditions for your app.

d. Select **Save**.

3. Configure the Group and Channel app.

a. Navigate to **Configure** > **App features** > **Group and Channel app**.

b. On the Group and channel app details page, fill in the fields.

Group and channel app details page

Field	Description
Configuration URL	The configuration URL in the following format: `https://<instance_name>.service-now.com/sn_now_teams_ext_meeting_configuration.do`
Scope	The meeting types **Team** or **GroupChat**,depending on where users can use your app.
Context	Select all context items from the list.
Users can reconfigure the app	Option to allow users to reconfigure the Meeting Extensions app.

c. Select **Save**.

4. Assign the chat and meeting permissions.

a. Navigate to **Permissions** > **Chat/Meeting permissions**.

b. Select *`MeetingStage.Write.Chat`*.

c. Select **Save**.

5. Go to **Single sign-on** and enter the Application ID URI in the format `api://<instance_name>.service-now.com/<client ID in Microsoft Azure>`. For information about the Client ID, see Create an app in Microsoft Teams to enable making calls.

6. Add a domain.

a. Navigate to **Domains** > **Create your first domain**.

b. Enter `*.service-now.com` in the Add domain dialog box to allow authorizations for ServiceNow URLs.

7. Select **Publish/Distribute**.

What to do next

Upload the app manifest in Microsoft Teams.

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Upload the app manifest in Microsoft Teams

Enable users to interact with agents from Microsoft Teams application by copying the Notify connector App ID value.

Before you begin
Role required: Microsoft Teams admin

Procedure

1. Log in to Microsoft Teams admin portal.
2. Navigate to **Teams apps** > **Manage apps** > **Upload new app** > **Upload**.
3. Search, select, and open (in the Upload a custom app dialog-box) the app package you downloaded in the section Create and configure an app for Meeting Extensions in the Microsoft Teams Developer Portal.
4. Go to **Manage Apps**, search for the uploaded app, open and copy the **App ID** value in a notepad from the app details page.
   This App ID is used for Meeting Extensions and so, this App ID must be updated in System Properties in ServiceNow® instance.

Add the Meeting Extensions tab in Microsoft Teams

Map the ServiceNow® Meeting Extensions app ID in your ServiceNow instance to automatically add the meeting extensions tab in Microsoft Teams for a conference call.

Before you begin
Role required: sn_notify_msteams.admin

Procedure

1. Log in to the ServiceNow instance.
2. Navigate to **Notify** > **Microsoft Teams** > **Properties**.
3. Paste the copied App ID value in **Application ID of Meeting Extensibility teams app (The App ID can be found from "Manage apps" page in Teams Admin portal)** and select **Save**.

   Note: Log in to the Microsoft Teams portal, search for and open **Notify Connector for Microsoft Teams** app at least once for the Meeting Extensions app to work.

   Meeting Extensions app is set up.

Configure the Notify connector app to use Meeting Extensions in the Microsoft Azure portal

Configure the existing Notify connector app/bot to use Meeting Extensions in Microsoft Azure portal to fetch the incident details during the conference call in Microsoft Teams.

Before you begin
Role required: Microsoft Azure admin

About this task
No need to create a separate Meeting Extensions bot as the Meeting Extensions app depends on the Notify connector for Microsoft Teams app. You can configure the existing Notify connector app/bot in the Microsoft Azure portal for Meeting Extensions to have a seamless conference call experience in Microsoft Teams.

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Note: Ensure that API permissions are configured for the Notify connector for Microsoft Teams app in the Microsoft Azure portal. For more information, see Manage permissions and authenticate the Notify connector app/bot in Microsoft Azure portal. You must update the following changes to the existing Notify connector app in the Microsoft Azure portal.

Procedure

1. Log in to Microsoft Azure portal as Microsoft Azure admin.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. Open the app created for Notify connector in Microsoft Teams in the section Create an app in Microsoft Teams to enable making calls.
4. Navigate to **Manage** > **API Permissions** > **Add a permission** > **Microsoft Graph** and select **Application permissions**.
5. Search and select the following values using **Select permissions**, and then select **Add permissions**.
   - **TeamsTab.ReadWriteForChat.All** from TeamsTab list.
   - **TeamsAppInstallation.ReadWriteForChat.All** from TeamsAppInstallation list.
6. Grant admins access to the Microsoft Azure applications that require admin approval.
   a. Select **Grant admin consent for <tenant>** in the API permissions page.
   b. Select **Yes** in the Grant admin consent confirmation pop-up page.
7. Authenticate app to receive the incoming requests from Microsoft Teams into ServiceNow® instance.
   a. Navigate to **Manage** > **Authentication** > **Platform configurations** > **Add a platform** > **Web applications** > **Web**.
   b. On the form, fill in the fields.

Configure Web form

Field	Description
Redirect URIs	Enter the meeting login URL. URL should be in the following format: `https://<instance-name>.service-now.com/sn_now_teams_ext_meeting_login.do`
Implicit grant	Select **Access tokens** and **ID tokens**

   c. Click **Configure**.

Configure the Notify connector bot for Meeting Extensions

Configure the Notify connector bot for Meeting Extensions in the Microsoft Azure portal.

Before you begin

Role required: Microsoft Azure admin

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Procedure

1. Log in to the Microsoft Azure portal at https://portal.azure.com/ as the Microsoft Azure admin.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. Search for and open the new bot created for Notify Connector by name or by Application (client) ID.
   The app was created in the section Create an app in Microsoft Teams to enable making calls.
4. Expose an API.

   a. Navigate to **Manage** > **Expose an API** > **Application ID URI** > **Set**.

   b. Paste the Application ID URI `api://<instance_name>.service-now.com/<client-id-in-azure>`, which was set for the Single-sign on in the section Create and configure an app for Meeting Extensions in the Microsoft Teams Developer Portal and select **Save**.

   c. Select **Add a scope**.

   d. On the form, fill in the fields.

Add a scope form

Field	Value
Scope name	`access_as_user`
Who can consent?	Select **Admins and users**.
Admin consent display name	Enter a valid name. For example, `Teams can access the user's profile`.
Admin consent description	Enter a valid description. For example, `Allows Teams to call the app's web APIs as the current user.`
User consent display name	Enter a valid name. For example, `Teams can access the user profile and make requests on the user's behalf.`
User consent description	Enter a valid description. For example, `Enable Teams to call this app's APIs with the same rights as the user.`
State	Set to **Enabled**

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e. Select **Add scope**.

f. Select **Add a client application**, enter the value `1fec8e78-bce4-4aaf-ab1b-5451cc387264` for Microsoft Teams desktop and mobile application in the **Client ID**, and then select **Authorized scopes**, and select **Add application**.
For more information, see 'Update Azure AD app registration for SSO' section on the Extend a Teams personal tab across Microsoft 365 app page.

g. Select **Add a client application**, enter the value `5e3ce6c0-2b1f-4285-8d4b-75ee78787346` for Microsoft Teams desktop and mobile application in the **Client ID**, and then select **Authorized scopes**.
For more information, see the "Update Azure AD app registration for SSO" section on the Extend a Teams personal tab across Microsoft 365 app page.

h. Select **Add application**.

Create an application registry entry in your ServiceNow instance

Register the application with the instance to participate in OAuth authorization.

Before you begin

Role required: oauth_admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. For the **What kind of OAuth application** field, select **Configure an OIDC provider to verify ID tokens**.
4. On the form, fill in the fields.
   - Name: Enter a name to uniquely identify the record; for example, Microsoft Teams.
   - Client ID: Enter the client ID value in the format `api://<instance-name>.service-now.com/<client-id>` from the section Create an app in Microsoft Teams to enable making calls.
   - Client Secret: Enter any random value as client secret and make a note of it.
   - Add an OAuth OIDC Provider Configuration record.
     a. Select **OAuth OIDC Provider Configuration** lookup to create a new record and select **New**.
     b. On the OIDC Provider Configuration New record form, fill in the fields.

OIDC Provider Configuration New record form

Field	Description
OIDC Provider	Name to uniquely identify the record. For example, Microsoft Teams meeting extensions.
OIDC Metadata URL	Enter value in the following format:

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Field	Description
	`https://login.microsoftonline.com/{tenant_id_from_azure}/v2.0/.well-known/openid-configuration` To copy tenant ID, see Create an app in Microsoft Teams to enable making calls.
User claim	Enter any preferred user-name.

   c. Right-click on the OIDC Provider Configuration New record form header and select **Save**.

   d. Select **Submit**.

- Add an OAuth Entity Scope record.

   a. Select **OAuth Entity Scopes** related list.

   b. Add a record with the values `Default` in **Name** and `.default` in **OAuthscope**.

5. Select **Save** on the OAuth OIDC Entity form.
6. Generate a new OAuth token.

   a. Navigate to **Notify** > **Microsoft Teams** > **Configuration**.

   b. Open the record associated with the **Requester** by selecting **Preview this record** icon and then select **Open Record**.

   c. Select the **Get OAuth Token** related link to refresh the token.

   d. Select **Update** on the OAuth 2.0 Credentials form.

   e. Select **Update** on the Microsoft Teams configuration form.

What to do next

After completing Meeting Extensions integration with Microsoft Teams, see the section Meeting Extensions for Microsoft Teams.

Integrating ServiceNow with Microsoft Teams for GCC-H or DoD

Set up your ServiceNow instance to integrate with Microsoft Teams applications.

You can integrate Employee Center, Virtual Agent, and request-based chatbots with Microsoft Teams for Government Community Cloud - High (GCC-H) or US Department of Defense (DoD) customers.

Integrating Virtual Agent with Microsoft Teams for GCC-H or DoD

You can integrate Virtual Agent with Microsoft Teams for GCC-H customers by configuring your own apps.

Integrating Employee Center with Microsoft Teams for GCC-H or DoD

You can integrate Employee Center with Microsoft Teams to enable Government Community Cloud High (GCC-H) and US Department of Defense (DoD) customers to access attached files in Employee Center.

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Prerequisites

Before integrating Employee Center with your Microsoft Teams tenant, ensure that the following prerequisites are met:

- Your ServiceNow instances have been upgraded to the Vancouver release.
- You have not previously attempted to install the Conversational Integration with Microsoft Teams app on your instances.
- You have the admin permissions for the ServiceNow instance and Microsoft Azure instances.

Integration process

The overall process to integrate Employee Center with your Microsoft Teams tenant involves the following tasks:

1. Activate the IT Service Management integration with Microsoft Teams plugin (sn_now_teams_it).

   Note: For more information on activating plugins, see Activate a plugin.

2. Create Microsoft Azure application and authenticate users to access Employee Center in Microsoft Teams.
3. Update the OIDC entities table.
4. Update your Microsoft Teams tenant URL for GCC-H or DoD.
5. Download and modify the manifest file for Employee Center for GCC-H or DoD.
6. Upload manifest file in Microsoft Teams.

Update the OIDC entities table

Update the OIDC entities table to replace dummy values created by the registry file with your Microsoft Teams tenant values.

Before you begin

Role required: admin

Procedure

1. In the Navigation filter, enter `oauth_oidc_entity_list.do`.
2. Select the ServiceNow for Microsoft Teams App record.
3. In the **Client ID** field in the OAuth OIDC entities table, enter `api://INSERT_COMPLETE_INSTANCE_URL_without_http(s)/ APPLICATION (CLIENT) ID` .
4. Select the reference icon beside the **OAuth OIDC Provider Configuration** field.
5. Select **Open Record**.
6. In the **OIDC Metadata URL** field in the OIDC Provider Configuration table, enter your directory (tenant) Id.
7. Select **Update**.

Download and modify the manifest file for Employee Center for GCC-H or DoD

Download and modify the package file to provide the information that is required to make Employee Center available in your organization.

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Before you begin
Role required: admin

About this task
To download, edit, and upload the manifest file, refer to this Knowledge Base article.

Procedure
1. Download the `Employee_Center_Integration_With_Teams_For GCCH.zip` file from this Knowledge Base article and extract its contents.
   The manifest zip file that you downloaded from the Knowledge Base article includes the following files:
   - Color.png
   - Manifest.json
   - Outline.png
2. Open the manifest.json file and replace **INSERT_CLIENT_ID** with your Application (Client) ID next to `id` under `version`, `id` under `webApplicationInfo`, and `botId` under `composeExtensions`.
3. Replace **INSERT_COMPLETE_INSTANE_URL** with your URL next to `contentUrl` and **INSERT_COMPLETE_INSTANE_URL** next to `websiteUrl` under `staticTabs`.
4. **Optional:** Customize the values of `packageName`, `short` name, `full` name, and **accent color** in the manifest file to re-brand your self-configured bot.
   If you would like to change the bot icon and outline icon, you can replace the color.png and outline.png files with your desired images.

   Note: Ensure that you have not changed the names for these files while uploading.

   For more information about image requirements, see Microsoft documentation.
5. **Optional:** Add additional domains in the manifest file to preview content using the task module for content outside of the default ServiceNow domain, you can add additional domains in the manifest file.

   Note: By default, the manifest file already contains the ServiceNow domain under validDomains. It also includes a `true` attribute next to `"supportsFiles"`, which adds the file attachment icon in your Virtual Agent conversation. If you do not want to include additional domains for the content preview feature, you can skip this step.
6. Save the updated files and compress the three files (manifest.json, color.png, and outline.png) into a new zip file.
   Select all three files and click **Compress** instead of compressing the folder itself.

Update your Microsoft Teams tenant URL for GCC-H or DoD

Configure your Microsoft Teams tenant URL for Government Community Cloud High (GCC-H) or US Department of Defense (DoD).

Before you begin
Role required: security_admin

Procedure
1. In the Navigation filter, enter `sys_response_header_list.do`.
2. In the HTTP Response Headers table, append the appropriate URL in the **Value** field of the following records:

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- Global
- Microsoft Integrations – Core/UI Page: ms_login
- Employee Center Core/Service Portal: Employee Center

Use the following URLs:

- GCC-H: `https://gov.teams.microsoft.us`
- DoD: `https://dod.teams.microsoft.us`

3. Select **Update**.

Integrating Employee Center and Virtual Agent with Microsoft Teams for GCC-H or DoD

You can integrate Employee Center and the Virtual Agent bot with Microsoft Teams to enable Government Community Cloud High (GCC-H) and US Department of Defense (DoD) customers to interact with agents through Virtual Agent and access the attached files in Employee Center.

Prerequisites

Before integrating Employee Center with your Microsoft Teams tenant, ensure that the following prerequisites are met:

- Your ServiceNow instances have been upgraded to the Vancouver release.
- You have not previously attempted to install the Conversational Integration with Microsoft Teams app on your instances.
- You have the admin permissions on ServiceNow and Microsoft Azure instances.

Integration process

The overall process to integrate Employee Center with your Microsoft Teams tenant involves the following tasks:

1. Activate the IT Service Management integration with Microsoft Teams plugin (sn_now_teams_it) and Glide Virtual Agent plugin (com.glide.cs.chatbot).

   Note: For more information on activating plugins, see Activate a plugin.

2. Create Microsoft Azure application and authenticate users to access Employee Center in Microsoft Teams.
3. Create a bot in Microsoft Teams for GCC-H or DoD.
4. Integrate your self-configured bot with Microsoft Teams for GCC-H or DoD.
5. Update your Microsoft Teams tenant URL for GCC-H or DoD.
6. Modify and download the manifest file for GCC-H or DoD.
7. Upload manifest file in Microsoft Teams.

Modify and download the manifest file for GCC-H or DoD

Create and download the ServiceNow for Microsoft Teams manifest file from your instance to enable Microsoft Teams to use the ServiceNow for Teams app.

Before you begin
Role required:external_app_install_admin

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Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **ServiceNow for Teams**.
2. Click **New**.
   The **Generic Info** tab appears.
3. In the **Generic Info** section, enter the details.

   a. **Short name**: Option to provide a short name for the manifest file.

   b. **Full name**: Option to provide the complete name for the manifest file.

   c. **Version**: Version of the manifest file.
   Ex: 1.0.0

   d. **Unfurl Links**: Option to unfurl the links in Microsoft Teams.

   Link unfurling generates a content-rich preview(adaptive card) when a supported link is shared in a conversation with a user in Microsoft Teams. For more details about link unfurling, refer Unfurl the web links in Microsoft Teams chat.

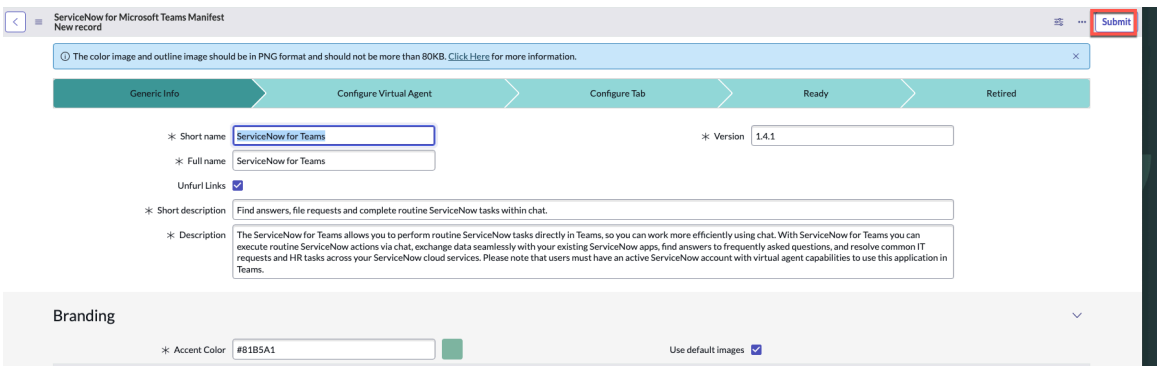
   e. **Short description**: Short description about the manifest file.

   f. **Description**: Detailed description about the manifest file.

   g. **Accent Color**: Option to choose a custom color for the conversations in Microsoft Teams as per the company branding and the accent color should be in HTML color code format.

   Note: If you want to customize the company branding, clear the **Use default images** option and then upload the icons. For more information on the size of icons, refer App icons and manifest schema icons.

4. Click **Submit**.



5. In the **Generic Info** section, click **Next** to navigate to **Configure Virtual Agent** tab.

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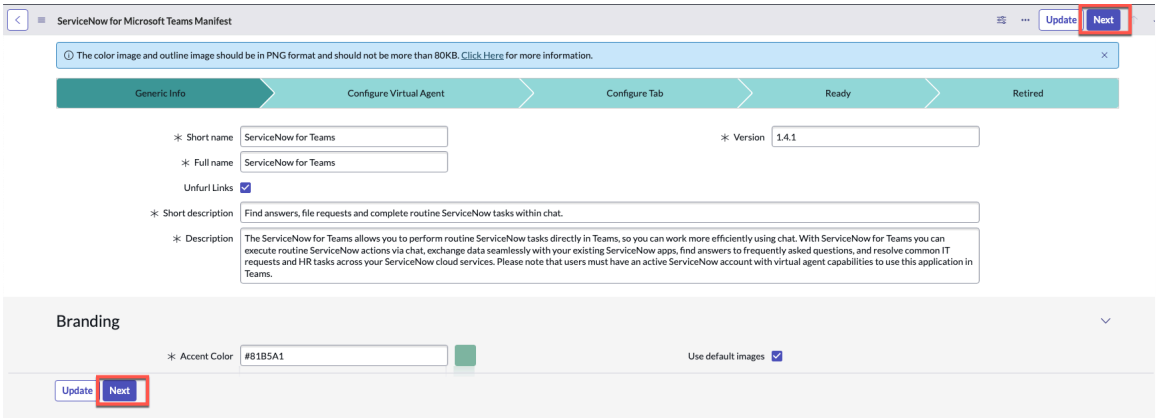
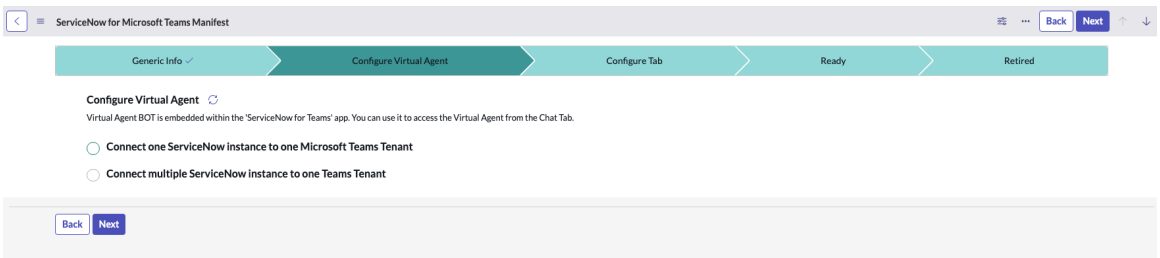


6. In the **Configure Virtual Agent** section, you can do one of the following.

   To configure the Virtual Agent in your instance, click **Configure Virtual Agent**. For more information, see Conversational Integration with Microsoft Teams.



   Select **Connect multiple ServiceNow instances to your Microsoft Teams tenant**and select the Virtual agent installed in Step 5.

7. In the **Configure Tab** section, enter the following.

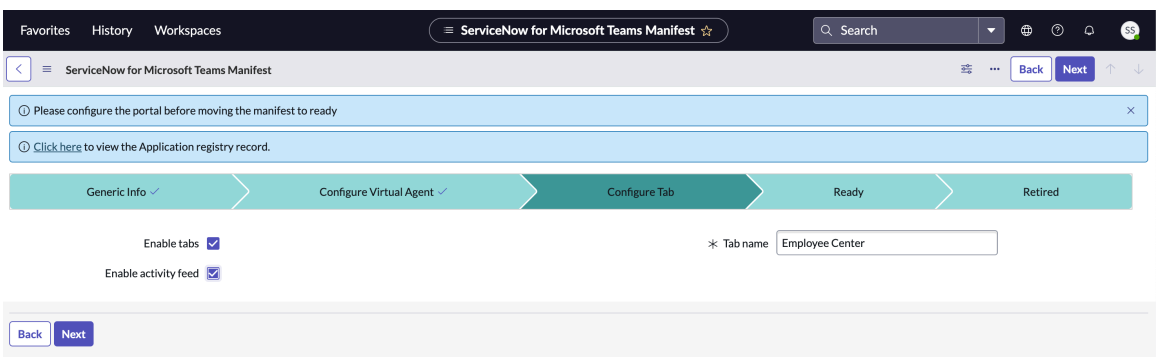
   a. **Enable tabs**: Option to add tabs in Microsoft Teams application and this is selected by default.

   b. **Tab name**: Option to provide a name for the Service portal tab that appears in Microsoft Teams.

   c. **Enable Activity Feed**: Option to enable activity feed to receive campaign notifications in Microsoft Teams and this option is selected by default.

   d. Click **Next**.

      For self-configured app, you must provide the Application (client) ID and Directory (tenant) ID in the **Configure Tab** section.



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8. In the **Ready** section, select **Enable Activity Feed** option to receive notifications for campaigns.

   Verify the details provided and click **Download Manifest** to download the manifest file.

   The manifest file downloads in the zip format.

What to do next

You must upload the manifest file in Microsoft Teams. For more information, refer Upload manifest file in Microsoft Teams.

Integrating Request-based chat with Microsoft Teams for GCC-H or DoD

You can integrate request-based chat with Microsoft Teams for Government Community Cloud - High (GCC-H) or US Department of Defense (DoD) customers to auto import the chat conversations between the agents and the employees.

Prerequisites

Before integrating Employee Center with your Microsoft Teams tenant, ensure that the following prerequisites are met:

- Your ServiceNow instances have been upgraded to the Vancouver release.
- You have not previously attempted installing the Conversational Integration with Microsoft Teams app on your instances.
- You have the admin permissions on ServiceNow and Microsoft Azure instances.

Integration process

1. Activate the IT Service Management integration with Microsoft Teams plugin (sn_now_teams_it).

   Note: For more information on activating plugins, see Activate a plugin.

2. Register and configure the Request-based chat application on the Microsoft Azure portal.
3. Add permissions to the Microsoft Azure application.
4. Configure Application Registry on the ServiceNow instance.

   Note: For GCC-H and DoD, use the `https://login.microsoftonline.us/` domain for token and authorization URLs on the application registry page.

5. Update chat credentials with Azure GCC URL.
6. Create record with Azure GCC details.

Update chat credentials with Azure GCC URL

Update the Azure URL in the chat credentials of GCC customers. Enable GCC customers to start chat and import chat conversations from Microsoft Teams to the ServiceNow instance.

Before you begin

Role required: admin

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Procedure

1. In the navigation filter, enter `http_connection_list.do`.
   The HTTP(s) Connection [http_connection_list.do] table appears.
2. Open the Chat Credential record with the connection alias sn_tcm_collab_hook.MS_Teams_Chat_Credentials.
3. In the **Connection_URL** field, enter the URL `https://graph.microsoft.us/`.

   Note: For DoD customers, enter the URL `https://dod-graph.microsoft.us`.

4. Select **Update**.

Create record with Azure GCC details

Create and update a new record in the sys_properties.list table with the details of the Azure account of GCC customers.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The System Properties [sys_properties] table appears.
2. Select **New**.
3. In the **Name** field, enter *`sn_now_teams.teams_url`*.
4. In the **Value** field, enter the URL `https://gov.teams.microsoft.us`.

   Note: For DoD customers, enter the URL `https://dod.teams.microsoft.us`.

5. Select **Update**.

Integrating ServiceNow with Microsoft 365 applications for Employee Experience

Set up your ServiceNow Employee Center instance to integrate Microsoft 365 applications.

Important:

- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, follow the steps given here.

The ServiceNow Employee Center integration with Microsoft Teams extends its capability to enable integration with other Microsoft 365 applications, bringing the ServiceNow employee experience to Microsoft Outlook, Microsoft Office 365, and Microsoft Teams together.

Prerequisites

Before integrating Employee Center with your Microsoft 365 tenant, ensure that the following prerequisites are met:

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- You have the external app install admin (external_app_install_admin) permissions on ServiceNow.
- You have installed and deployed one of the following:
  - IT Service Management for Microsoft 365
  - HR Service Delivery for Microsoft 365

  For more information on how to install IT Service Management with Microsoft 365 or HR Service Delivery with Microsoft 365, see Integrating ServiceNow with Microsoft Teams and Microsoft 365.

Integration process for pre-published apps

1. Upgrade to IT Service Management for Microsoft 365 / HR Service Delivery with Microsoft 365 by installing the latest IT Service Management for Microsoft 365 / HR Service Delivery with Microsoft 365 plugin.

   Note: For more information on activating plugins, see Activate a plugin.

2. Regenerate and download a new manifest file for Microsoft 365.

   For more information on how to generate and download the manifest file, see Create and download manifest file for Employee Center and Microsoft 365 integration.

3. Upload manifest file in Microsoft Teams for Microsoft 365.

Integration process for self-configured apps

1. Upgrade to IT Service Management for Microsoft 365 / HR Service Delivery with Microsoft 365 by installing the latest IT Service Management for Microsoft 365 / HR Service Delivery with Microsoft 365 plugin.

   Note: For more information on activating plugins, see Activate a plugin.

2. Authenticate users to access Employee Center in Microsoft 365 applications by updating the client IDs in the *`Microsoft Azure`* application.

   Client IDs

Application	Client ID
Microsoft Teams mobile/ desktop application	**1fec8e78-bce4-4aaf-ab1b-5451cc387264**
Microsoft Teams web application	**5e3ce6c0-2b1f-4285-8d4b-75ee78787346**
Microsoft 365 web application	**4765445b-32c6-49b0-83e6-1d93765276ca**

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Application	Client ID
Microsoft 365 desktop application	**0ec893e0-5785-4de6-99da-4ed124e5296c**
Microsoft Outlook desktop application	**d3590ed6-52b3-4102-aeff-aad2292ab01c**
Microsoft Outlook web application	**bc59ab01-8403-45c6-8796-ac3ef710b3e3**
Microsoft Outlook mobile application	**27922004-5251-4030-b22d-91ecd9a37ea4**

For more information on updating the *Microsoft Azure* application and authenticating users, see Create Microsoft Azure application and authenticate users to access Employee Center in Microsoft Teams.

3. Regenerate and download a new manifest file for Microsoft 365.

   For more information on how to generate and download the manifest file, see Create and download manifest file for Employee Center and Microsoft 365 integration.

4. Upload manifest file in Microsoft Teams for Microsoft 365.

Create and download manifest file for Employee Center and Microsoft 365 integration

Create and download the manifest file from your instance to make Employee Center available in Microsoft 365 applications.

Before you begin

Role required: external app install admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Application Manifest** > **ServiceNow for Teams**.
2. Select **New**.
   The **Generic Info** tab appears.
3. In the Generic Info section, fill in the following fields.

Generic Info section

Field	Description
Short name	Option to provide a short name for the manifest file.
Full name	Option to provide the complete name for the manifest file.
Version	Version of the manifest file. For example, 1.0.0
Unfurl Links	Option to unfurl the links in Microsoft Teams.

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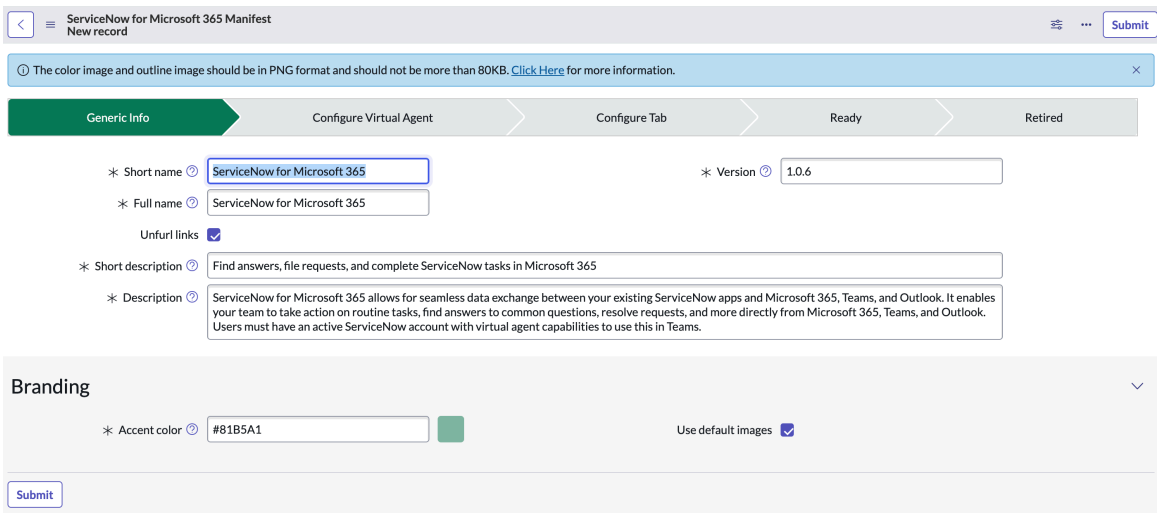
Field	Description
	Link unfurling generates a content-rich preview (adaptive card) when a supported link is shared in a conversation with a user in Microsoft Teams. For more details about link unfurling, refer Unfurl the web links in Microsoft Teams chat.
Short description	Short description about the manifest file.
Description	Detailed description about the manifest file.
Accent Color	Option to choose a custom color for the conversations in Microsoft Teams as per the company branding. The accent color should be in HTML color code format. **Note:** If you want to customize the company branding, clear the **Use default images** option and then upload the icons. For more information on the size of icons, refer App icons and manifest schema icons.

4. Select **Submit**.



5. In the Generic Info section, select **Next** to navigate to **Configure Virtual Agent** tab.
6. Configure the Virtual Agent in your instance by selecting **Configure Virtual Agent**.
   For more information, see Conversational Integration with Microsoft Teams.

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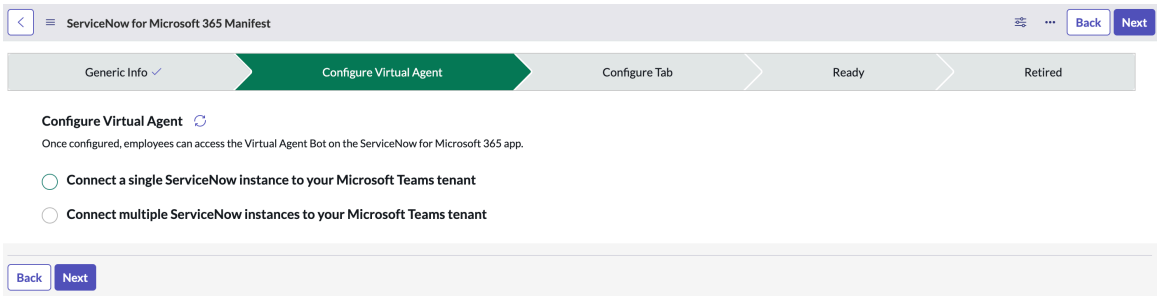


7. In the Configure Virtual Agent section, to connect to a single or multiple ServiceNow instances.
   - If you want to connect one ServiceNow instance to a Microsoft Teams tenant, select **Connect a single ServiceNow instance to your Microsoft Teams Tenant**.

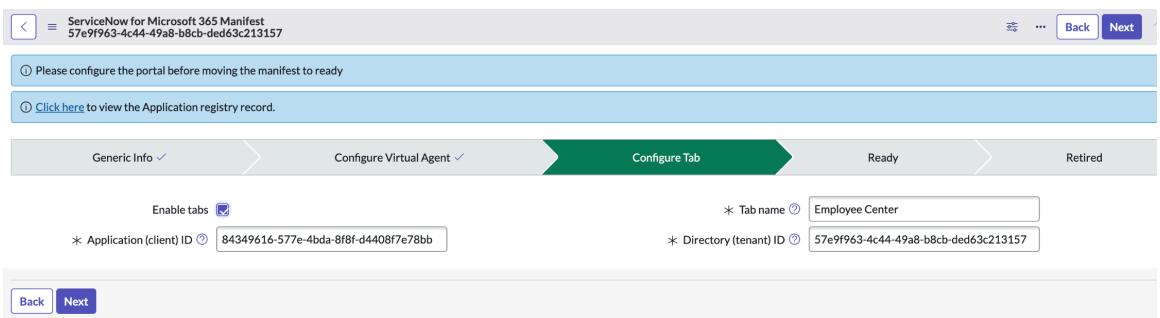
     The Virtual Agent Bot ID is auto-populated if you select this option.
   - If you want to connect multiple ServiceNow instances to one Microsoft Teams tenant, select **Connect multiple ServiceNow instances to your Microsoft Teams tenant**.

   To integrate Virtual Agent with Microsoft Teams by configuring your own bots, see Integrating Virtual Agent with Microsoft Teams using the self-configured bot.
8. In the Configure Tab section, fill in the following fields and select **Next**.

Configure Tab section

Field	Description
Enable tabs	Option to add tabs in Microsoft Teams application. This field is automatically selected.
Tab name	Option to provide a name for the Service portal tab that appears in Microsoft Teams.
Enable Activity Feed	Option to enable activity feed to receive campaign notifications in Microsoft Teams. This option is automatically selected.

9. For self-configured apps, provide the Application (client) ID and Directory (tenant) ID in the **Configure Tab** section.



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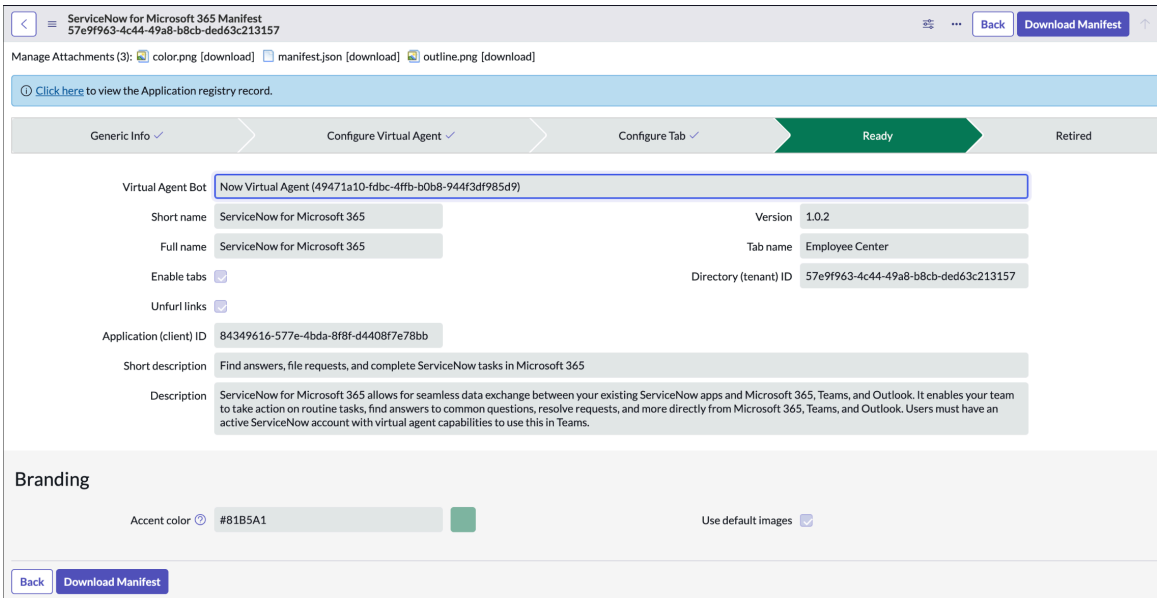
Important: The above step is not applicable for pre-published apps.

10. Receive notifications for campaigns by selecting **Enable Activity Feed** option in the Ready section.
11. Verify the details provided and select **Download Manifest** to download the manifest file.



The manifest file downloads in the zip format.

Result
An application registry is created.

Upload manifest file in Microsoft Teams for Microsoft 365

Upload the manifest file in Microsoft Teams to integrate Microsoft 365 with your ServiceNow instance.

Before you begin
Role required: admin

Procedure

1. Launch Microsoft Teams application.
2. Navigate to **Apps** > **Manage your Apps** > **Upload an app**.
3. Select the **Upload a custom app** option.

Note:

Ensure that ServiceNow for Microsoft 365 is allowed as a third-party app in Microsoft Teams. For information about allowing apps in Microsoft Teams, see the Microsoft Teams documentation.

4. Navigate to the location where the manifest file is downloaded and select the zip file.
5. Select **Open**.

The ServiceNow for Microsoft 365 app appears in the Apps screen.

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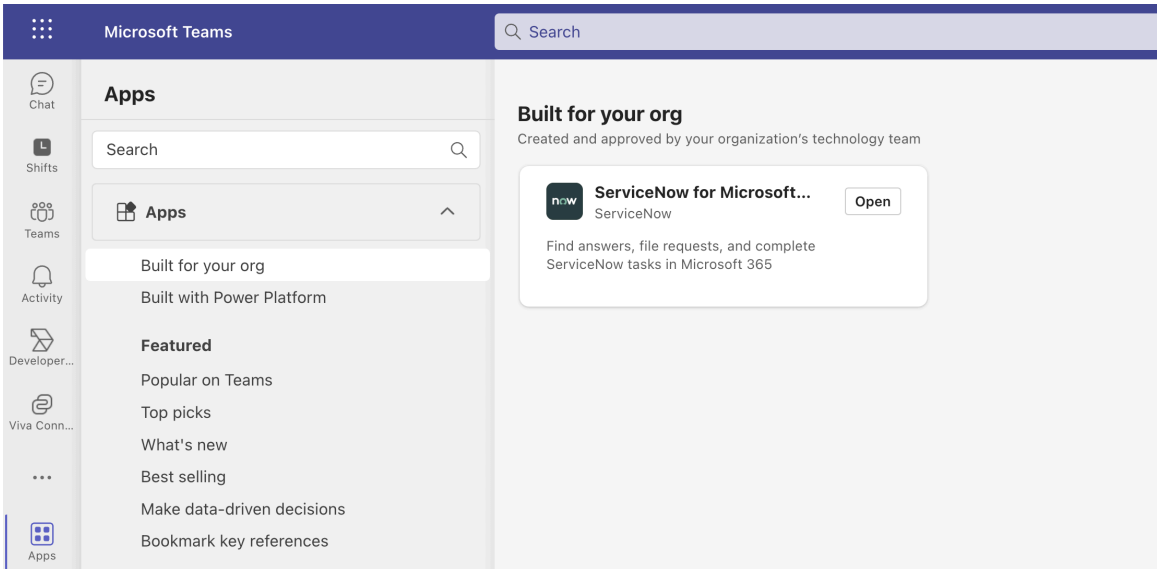

6. Select the ServiceNow for Microsoft 365 app.
7. Select **Add**.

Configuring ServiceNow for Microsoft Teams and Microsoft 365 integration

ServiceNow® for Microsoft Teams enables agents to initiate chat with employees and import the chat, and enables employees to view and receive chat service from within#he Microsoft Teams application.

Important:

- Actions that require the *admin* role, can also be performed with the *sn_now_teams.admin* role.
- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

Configuring Microsoft Teams integration for Employee Experience

Offers help for employees to resolve their IT, HR, and UR related issues through Microsoft Teams. Employees can interact with the agents from within Microsoft Teams to resolve their issues.

Configure IT Service Management integration with Microsoft Teams

Complete the procedures outlined to configure IT Service Management integration with Microsoft Teams.

Review the active notifications for Microsoft Teams

The notifications added by ServiceNow for Microsoft Teams, might duplicate existing notifications in your instance. Review and disable any duplicate notifications to avoid notifying users multiple times for the same event.

Before you begin
Role required: admin

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About this task

You will find the following duplicate notifications after installing the IT Service Management integration with Microsoft Teams application.

- Incident Update
- MS teams Non-actionable Approval
- Requested Item Update

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Notifications** > **Provider Notifications**.

   You can also navigate to **All** > **System Notifications** > **Provider** > **Notifications**.

2. On the Notifications list, select the **Name** column to sort the list in alphabetical order.
   This collates all the duplicate notifications.
3. Search for the **Incident Update** notification.
4. Select one of the **Incident Update** notifications.
5. Clear the **Active** field.
6. Select **Update**.
7. Repeat the process for the following notifications:
   - MS teams Non-actionable Approval
   - Requested Item Update

Result

Leave a comment on an incident record, only one notification appears about the comment in Microsoft Teams.

Enable Virtual Agent notifications for IT Service Management

Configure system properties to enable Virtual Agent notifications in Microsoft Teams.

Before you begin

Role required: admin

About this task

Note: If your first installation of IT Service Management for Microsoft 365 is version 2.7.0, Virtual Agent notifications are enabled by default. The following scenario is only applicable if you upgrade from older versions of the plugin.

After upgrading to IT Service Management for Microsoft 365 version 2.7.0, you must configure system properties to enable Virtual Agent notifications.

The following tables are supported for Virtual Agent notifications in the base system.

- Incident
- Change
- Requested Item

Procedure

1. In the **All** menu, enter `sys_properties.list`.
   The System Properties table appears.

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2. In the name column, search for `*sn_now_teams`.
3. For the following properties, set the value to `true`.
   - *`sn_now_teams.enable_va_approval_notification`*: This property enables Virtual Agent notifications for approvals.
   - *`sn_now_teams_it.enable_va_comment_notification`*: This property enables Virtual Agent notifications for comments.

   The default value of these properties is **true**. If you've upgraded from an earlier version of IT Service Management for Microsoft 365, the value is **false**.

What to do next
You can customize the fields displayed in approval notifications. For more information, see Customizing approval notification fields.

To configure LLM actionable provider notifications, refer to Configure LLM based provider notifications for ITSM.

Configure LLM based provider notifications for ITSM

Enable LLM-based actionable provider notifications for ITSM.

Before you begin
Ensure the following:

- You have the latest version of the IT Service Management for Microsoft 365.
- The following LLM Assets have their **Status** as **Published** and are **Active**:
  - _view_approval_details_LLM_
  - _view_add_comments__LLM_

  To check, navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.

Role required: admin

Procedure
1. Navigate to **ServiceNow for Microsoft 365** > **Notifications** > **Provider Notifications**.
2. In the Notifications list, select **Approvals - Actionable**.

   a. Scroll down to the Related links, select **Actions** tab.
   Verify that two **View Details** notification actions are listed.

   > **Important:** If only one action is listed, you must update to the latest version of the application.

   b. In the Related links, select **Link Actions to Content**.

   c. Select **Approvals link action**.

   d. Select the lock icon next to the **Actions** field.

   e. From the list of actions, select the other **View Details** action as well.
   Verify that the **Actions** field displays two **View Details** actions.

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f. Select **Update**.

g. Save the form.

3. In the Notifications list, select **Incident commented actionable**.

a. Scroll down to the Related links, select **Actions** tab.
Verify that two **View last comment** notification actions are listed.

> **Important:** If only one action is listed, you must update to the latest version of the application.

b. In the Related links, select **Link Actions to Content**.

c. Select **Incident commented content actions**.

d. Select the lock icon next to the **Actions** field.

e. From the list of actions, select the other **View last comment** action as well.
Verify that the **Actions** field display two **View last comment** actions.

f. Select **Update**.

g. Save the form.

What to do next

You can customize the fields displayed in approval notifications. For more information, see Customizing approval notification fields.

Customizing approval notification fields

You can customize the approval notification fields by creating the methods in a script include.

> **Note:** The topic uses the API names of the script includes.

Actionable Notifications are sent for approval and comments on tickets. You can customize the fields displayed in the approval notifications by creating methods in the `sn_now_teams.ApprovalsVAUtil()` script include. These methods override the ones in the `sn_now_teams.ApprovalsVAUtilSNC()` script include.

For information about script includes, see Script includes.

Creating the method

The notification logic calls a method based on the table that the approval record is created for. The method names follow this format: *`get<TableName>Fields()`*, which you can use to create a method for any table in the base system.

> **Note:** Custom tables aren't supported for approval notifications.

For example: If the table name is sc_request, the method name is *`getScRequestFields()`*. If the table name is incident, the method name is *`getIncidentFields()`*.

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Overriding the method fields

The methods that you create in the `sn_now_teams.ApprovalsVAUtil()` script include override the ones in `sn_now_teams.ApprovalsVAUtilSNC()`.

While creating the method, you can enter the field names that are displayed in the approval notification.

- For TASK extended tables, you can dot-walk to the referenced field by using the *`sysapproval`* field.

  For example:

```
getChangeRequestFields: function() {
 return {
   "fields":
 ["sysapproval.number", "sysapproval.short_description", "sysapproval.risk", "sysapp
roval.start_date", "state"]
   }
},
```

- For NON-TASK tables, you must enter the table fields directly.

  For example:

```
getKbKnowledgeFields: function() {
 return {
   "fields":
 ["number", "short_description", "kb_knowledge_base", "author", "workflow_state"]
   }
},
```

- You can create a default method, *`getDefaultFields()`*, which is used if the system doesn't find a method for the table in the approval record. The field references follow the TASK extended tables.

  For example:

```
getDefaultFields: function() {
 return {
   "fields":
 ["sysapproval.number", "sysapproval.requested_for", "sysapproval.price", "sysappro
val.due_date", "state"]
   }
},
```

Configure Request-based chats to import messages from Microsoft Teams to ServiceNow

Configure request-based chats for IT Service Management integration with Microsoft Teams and HR Service Delivery integration with Microsoft Teams applications enable the system to auto import the chat conversations between the agents and the employees.

If you are installing the ServiceNow for Microsoft Teams in your environment, the auto-import functionality is applicable by default for the following tables.

- HR Core task (sn_hr_core_task)
- HR Life events Case (sn_hr_le_case)

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- HR Core case (sn_hr_core_case)
- Request Item (sc_req_item)
- Task (sc_task)
- Incident (incident)
- Request (sc_request)
- Change request (change_request)

The admin can extend the auto import feature to the other tables as required. For more information see, Create requester mapping.

If you are upgrading your ServiceNow instance to IT Service Management integration with Microsoft Teams 2.2.0 or HR Service Delivery integration with Microsoft Teams 2.2.0, you must manually enable the auto import feature.

Functionality of auto importing messages

All the chat messages from Microsoft Teams will be auto imported to the ServiceNow instance at an interval of 30 minutes. The system looks for all the new messages across all the chats and import the messages to ServiceNow instance.

To prevent polling from running indefinitely on inactive conversations, if there are no new messages, the polling interval will gradually lengthen until, eventually, polling stops.

The system verifies the record for new messages for every 30 minutes. If there are no new messages, the system checks for the new messages for an interval of one hour, two hour, four hour and eight hours. If there are no new messages in an interval of eight hours for seven days, the Auto Import polling activity is disabled.

If there is any message during any of the intervals, the auto import timer will look for the new messages in the next interval, and import the messages. The timer is then reset to 30-minutes interval.

System Limits

The system imports a maximum of 500 active chats in a 30-minute interval. If there are more than active 500 chats the system will not auto-import the new chat records for the 30-minute interval.

The system executes a maximum of 10,000 sub-flows to import the chats for an interval of 30 minutes, 1 hour, 2 hour, 4-hour, 8-hour intervals. This is a count of all the active subflows that auto-import the messages into ServiceNow.

If the system reaches the limit, a message is displayed to the agent that the system level is reached and the chat can't be auto imported on the **Start Microsoft Teams Chat** modal.

When the ticket is closed, the system will trigger auto import for one last time posts the new messages in the Work notes (Chat history).

If there is an interaction record associated with the parent record then interaction record is also closed. The chat record will also be closed as part of this flow.

If you want to continue using the default configuration, you can skip the following procedures to extend the auto-import functionality. However, if you want to extend the auto-import functionality to other tables, perform the steps mentioned in the topics below.

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Configure the chat to enable auto-import

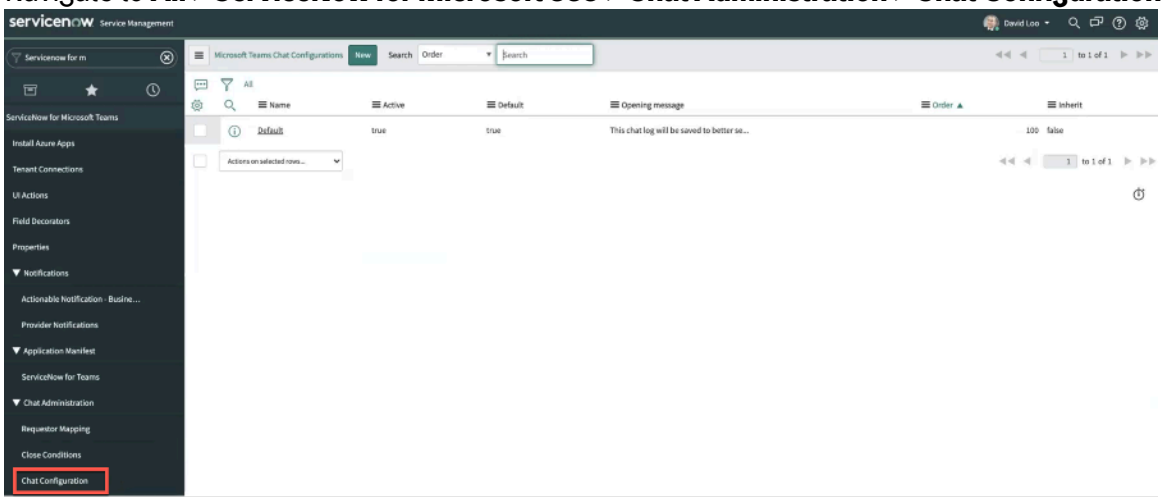
Create a chat configuration to automatically import the chats between the agents and the requesters for additional tables to extend the auto import functionality.

Before you begin

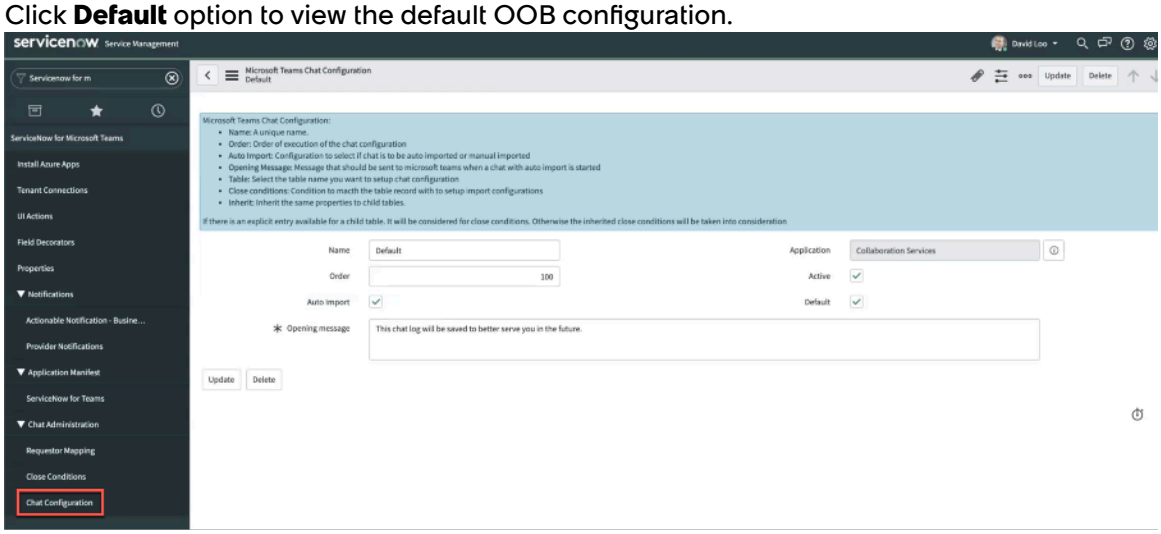
Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Chat Administration** > **Chat Configuration**.



2. Click **Default** option to view the default OOB configuration.



> **Note:** If you want to auto-import chats for certain conditions, create a condition.

3. Navigate to **ServiceNow for Microsoft Teams** > **Chat Administration** > **Chat Configuration**.
4. Click **New**.

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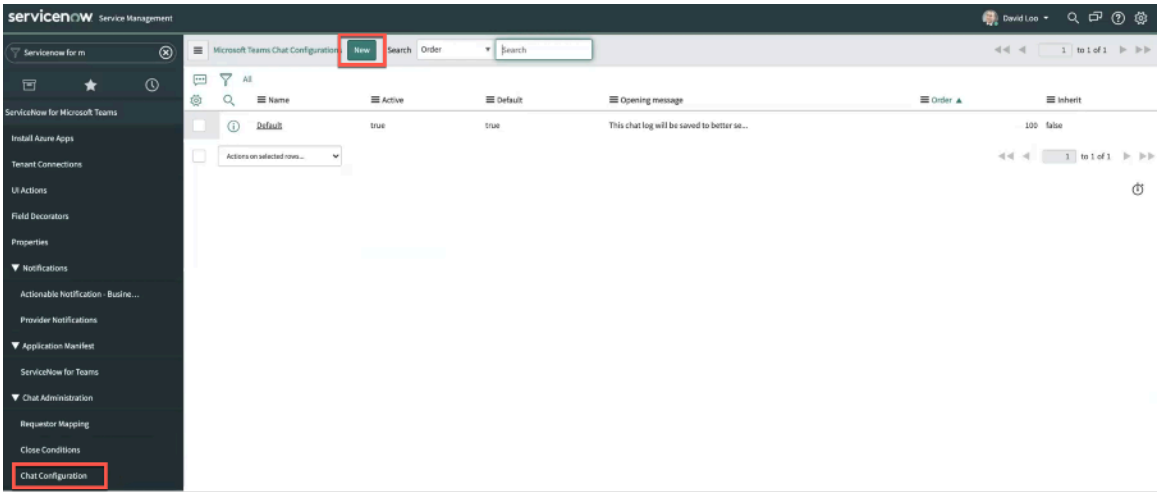

5. On the form, fill the fields.

Chat configuration

Field	Description
Name	Value for the configuration.
Order	Order for the configuration. You can define multiple chat configurations for a single table. The system executes the query based on the descending order.
Active	Option to activate the configuration. Select the check box to activate the configuration.
Auto Import	Option to automatically import the chat. Select the check box to automatically import the chat.
Default	Option to keep the configuration as default. **Note:** You cannot define multiple default values for chat configuration.
Table	Option to select the auto-import for a table.
Inherit	Extend and apply to the child tables.
Conditions	Option to define a condition for a chat to be auto-imported.
Opening message	Option to provide a text message that displays to the agent when the agent initiates a chat. This field is enabled only if the **Auto Import** option is selected.

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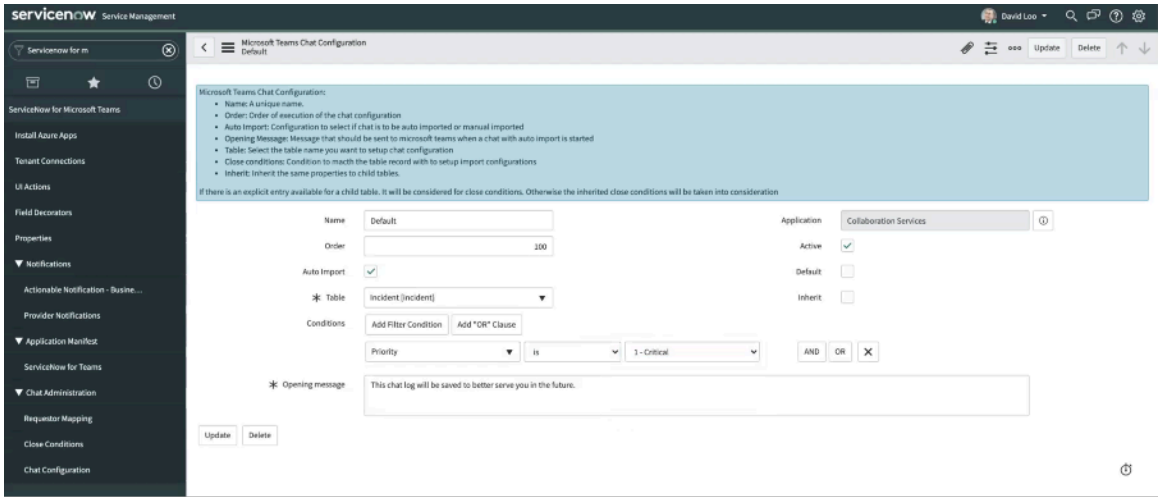


6. Click **Submit**.

   The chat configuration defined will be applicable only for the table selected. You can extend the chat configuration to other tables by creating another chat configuration record.

Create requester mapping

Create a requester mapping to extend the auto-import functionality to other tables.

Before you begin

Role required: admin

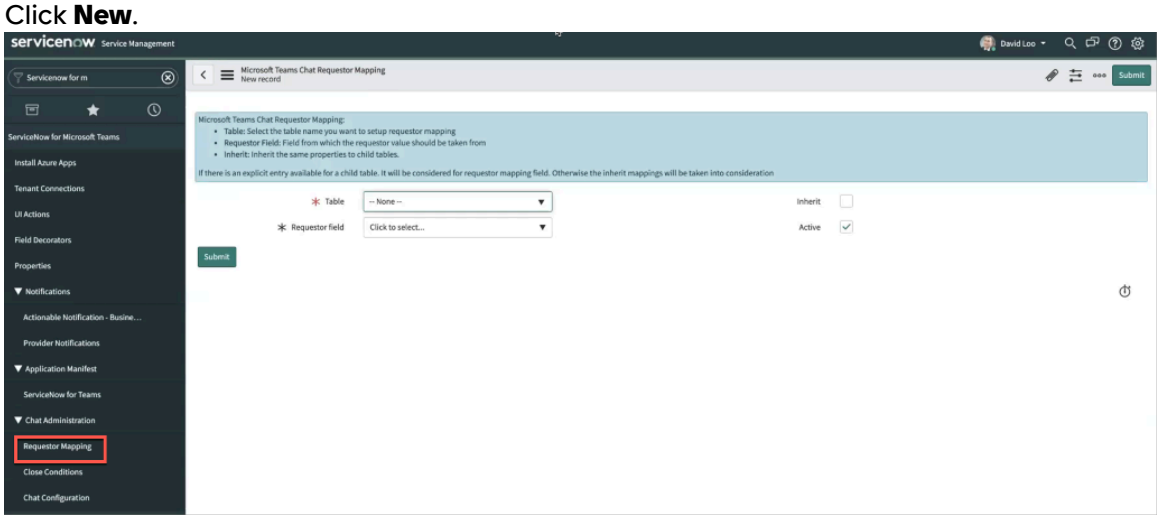
Note:

If there is no requestor mapping defined for a table, the interaction records will not be created. An error log is created for the admin to notify that the requestor mapping is not defined for a table.

A requestor-mapping record defines which field, in any given table, is the field representing the requestor of a ticket.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Chat Administration** > **Requestor Mapping**.
2. Click **New**.



3. On the form, fill in the fields.

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Requestor mapping

Field	Description
Table	Table to which the requestor mapping (auto-import feature) should be applicable.
Requestor field	Field to select the requestor for a record.
Inherit	Extend and apply the auto-import feature to the child tables.
Active	Option to activate the requestor-mapping record.

4. Click **Submit**.

Configure close condition

Configure the condition to exclude the chat conversation from auto importing.

Before you begin

Role required: admin

About this task

When a ticket is set to inactive, the system does one final poll for any messages in the chat, removes the participants such that no further messages about the ticket can be exchanged in the chat, and then stops polling that chat. This is determined by the "active" field on a table being set to "false".

For any table with an active field, this behavior works automatically. If your custom application does not use an "active" field for determining whether the ticket remains active, define an alternate condition that can be used to denote the ticket as being closed or inactive.

Alternately, to adhere to platform standards, consider adding an active field to your custom application and maintaining the state of that field in accordance with the business logic of your application.

Important:

If you are creating a close condition for a new table, ensure to create business rule for close condition. For more information, see Configure business rule for close condition.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Chat Administration** > **Close Conditions**.
2. Click **New**.

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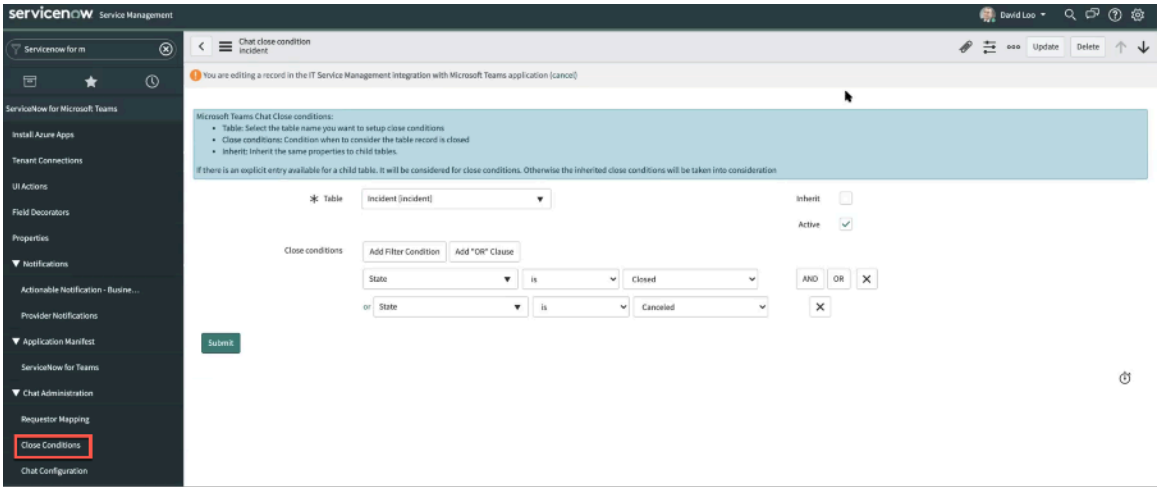

3. On the form, fill in the fields.

Close condition

Field	Description
Table	Option to select a table to which the requester mapping (auto-import feature) should be applicable.
Inherit	Extend and apply the auto-import feature to the child tables.
Active	Option to activate the requester-mapping record.
Close conditions	Condition builder to define a condition that the record is closed.

4. Click **Submit**.

Configuring Employee Center

Use the Employee Center within Microsoft Teams or embed a custom portal in Microsoft Teams.

Employee Center appears in Microsoft Teams when you install and configure Employee Center v23.0.5 or a higher version in your environment. For more information on Employee Center, see Employee Center.

If you install Employee Center Pro in your environment, the Employee Center Pro is available in Microsoft Teams.

If you don't install Employee Center in your environment, the Employee Service Portal is displayed in the Microsoft Teams application. Alternatively, you can embed a custom portal in Microsoft Teams.

Embed a custom portal

Embed your custom portal to replace the Employee Center tab in Microsoft Teams by configuring the system property. The custom portal shows up in the Employee Center tab in Microsoft Teams.

Before you begin

Role required: admin

If you're using a custom portal rather than the Employee Center, you can replace the embedded Employee Center with your custom portal, so that it's accessible within Microsoft Teams. The following steps take you through the configuration to embed your portal.

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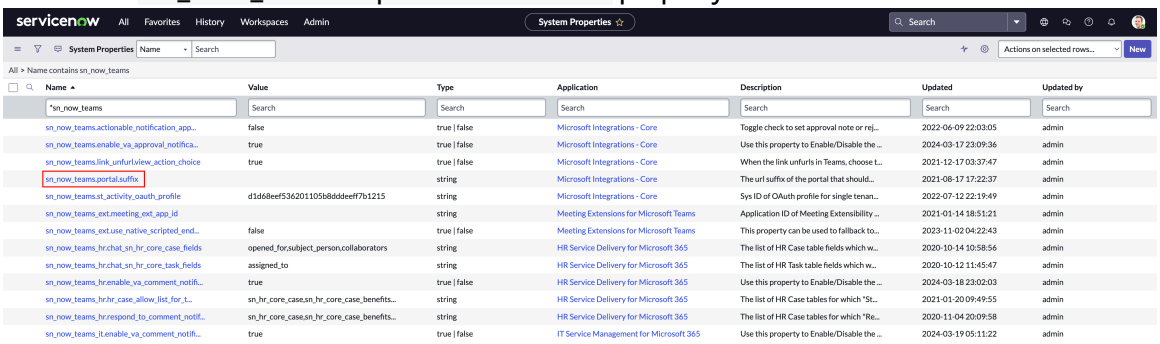
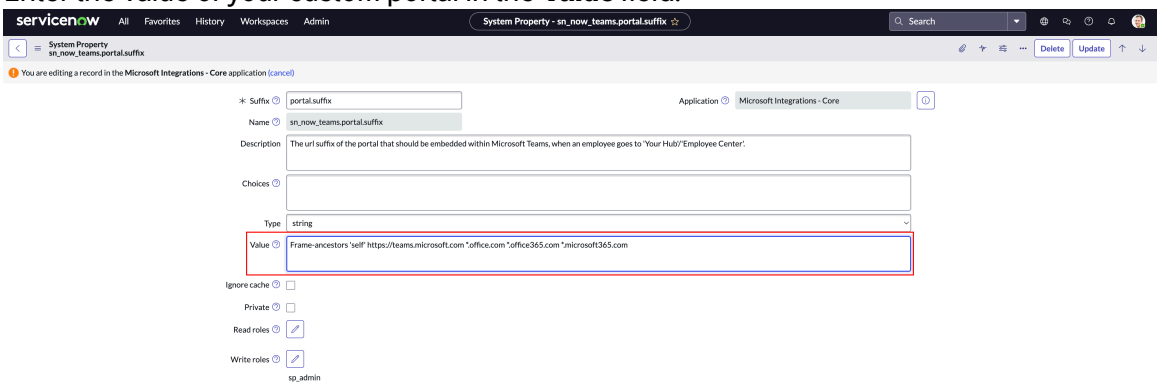
Procedure

1. In the navigation pane, enter `sys_properties.list`.
2. Search for `sn_now_teams.portal.suffix` property under Name.



3. Select **sn_now_teams.portal.suffix**.
4. Enter the value of your custom portal in the **Value** field.



5. Select **Update**.
6. Create a custom header for the embedded portal after you configure your custom portal.

   For more information on adding header configuration, see Configure HTTP response headers.

   a. In the Navigator pane, type `sys_response_header.list`.

   b. Select **New**.

   c. On the HTTP Response Header form, fill in the following fields based on your requirement.
      - Active
      - Application
      - Record
      - Description

   d. Enter the following field values.

Field values for the HTTP Response Header form

Field	Value
Applies to	Specify Type

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Field	Value
Type	Service Portal [sp_portal]
Name	Content-Security-Policy
Value	Frame-ancestors 'self' https://teams.microsoft.com **Important:** To enable the custom portal in all Microsoft 365 apps, add the following domains to the Value field. ▪ *.office.com ▪ *.office365.com ▪ *.microsoft365.com ▪ *.cloud.microsoft For example: `Frame-ancestors 'self' https://teams.microsoft.com *.office.com *.office365.com *.microsoft365.com *.cloud.microsoft`

e. Select **Submit**.

Hide the chat button on the custom portal

You can hide the chat option for your custom portal that appears in the Employee Center tab within Microsoft Teams.

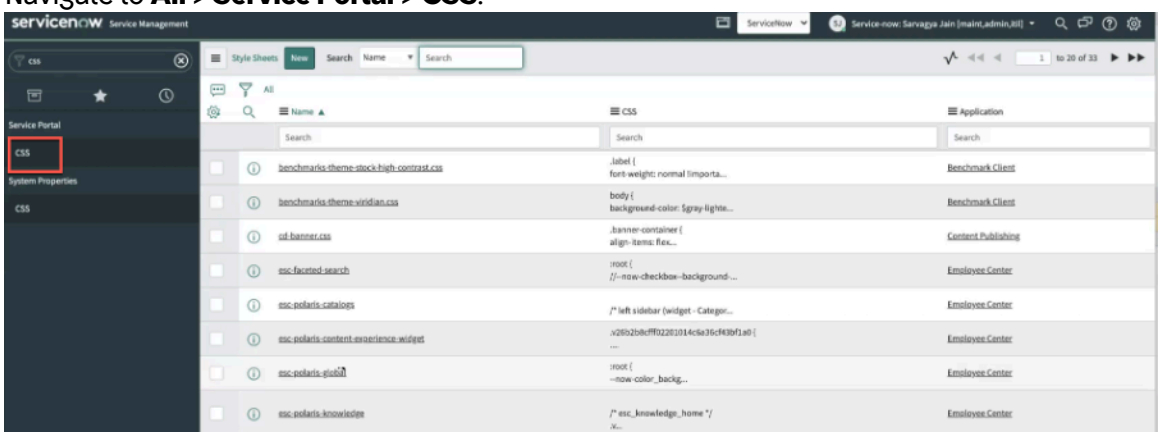
Before you begin

Ensure that you set the *com.glide.cs.advanced-chat-popover* system property to false.

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **CSS**.



2. Select the custom CSS that you want to edit.
3. Select the **click here** link to edit the CSS.

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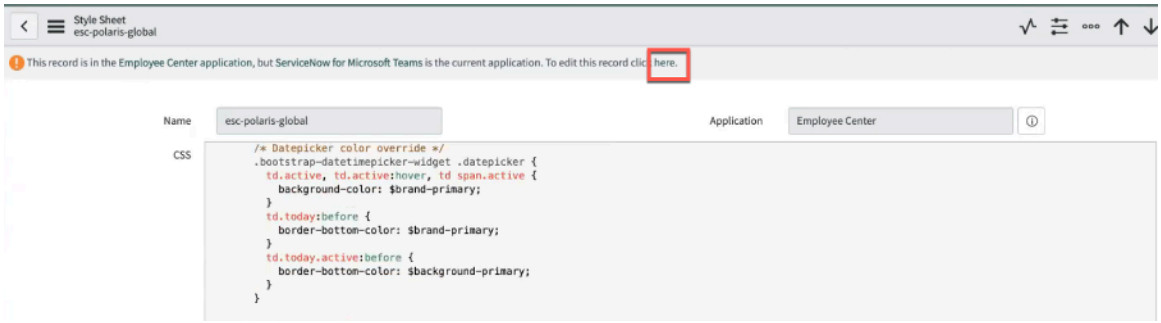


4. Paste the following code in the **CSS** field.

> **Note:** In the following code example, the `.embedded-experience .sp-ac-btn` element specifies the chat button and the `display: none;` property hides the button. You can customize the code based on your requirement.

```
/* Embedded portal */

.embedded-experience .sp-ac-btn {
        display: none;
      }
```

5. Select **Update**.
6. Refresh the custom portal tab in Microsoft Teams.

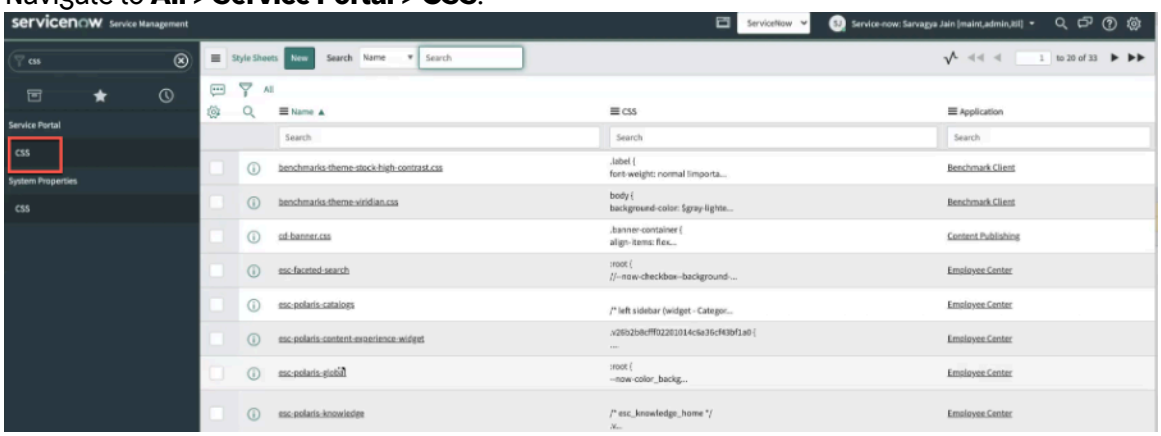
Hide the logout button on the custom portal

You can hide the logout option for your custom portal that appears in the Employee Center tab within Microsoft Teams.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **CSS**.



2. Click on your custom CSS.
3. Click **here** to edit the CSS.

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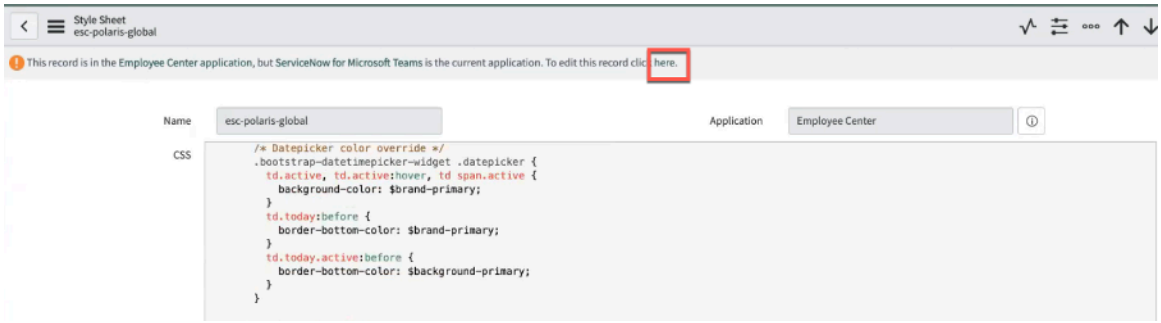

4. To disable the logout button from Microsoft Teams desktop application.

   Customize the following code as required and paste in the CSS.

```
/* Embedded portal */

/*The code shared to disable the logout button is an example.
 You need to customize as required to disable logout button.*/

.embedded-experience .avatar-drop-down .header-menu-item:last-c
hild {
        display: none;
      }
```

5. To disable the logout button from Microsoft Teams mobile application.

   Customize the following code as required and paste in the CSS.

```
/* Embedded portal */

/*The code shared to disable logout button is an example. You
 need to customize as required to disable logout button.*/

.embedded-experience .impersonate-and-logout {
          div > ul > li:last-child {
            display: none !important;
          }
      }
```

6. Click **Update**.
7. Refresh the custom portal tab in Microsoft Teams.

Microsoft Teams Chat widget in Employee Center

The Teams Chat widget enables employees to view or continue chats with agents and view and access the content of attached files in the Employee Center. This widget is available through the IT Service Management integration with the Microsoft Teams application.

Using the Teams Chat widget, employees can access ticket-specific Microsoft Teams chat conversations in Employee Center. If you are installing ServiceNow for Microsoft Teams in your environment, the Teams Chat widget feature is applicable to the following tables:

- Request Item (sc_req_item)
- Incident (incident)
- Change request (change_request)

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The admin can extend the Teams Chat widget feature to other tables.

Employees can take the following actions associated with their tickets:

- View the chat conversations with agents.
- View and access the content of attached files shared with agents.
- Continue a chat conversation with the agent handling the ticket using the Microsoft Teams application without having to exit the Employee Center.
- View the list of people involved in their chat conversation.

Add Microsoft Teams Chat widget

Add the Teams Chat widget to enable employees to view or continue chats with agents and view and access the content of attached files in the Employee Center.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. On the Ticket Configurations page, select **New**.
3. On the Ticket Configuration form, fill in the fields.
   For more information about the field descriptions, see Configure the standard ticket page.
4. Right-click the header menu and select **Save**.
5. From the Tab Configurations related list, select **New**.
6. On the Tab Configuration form, fill in the fields.

   Some fields require values specific to this task.

   - For the **Type** field, select **Custom**.
   - For the **Tab name** field, enter `Teams chat`.
   - For the **Widget** field, search for and select **Teams Chat**.

Tab Configuration form

Field	Description
Type	Tab type based on which a widget is displayed. Possible options are: ○ Activity ○ Associated Requests ○ Attachments ○ Custom ○ Variable Editor (Read-Only) ○ Variable Summarizer
Tab name	Name of the tab.
Application	Application associated with the ticket configuration.
Order	Order in which the tab should be displayed in the tabs section. The tab with the least order is the tab selected on the page load.

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Field	Description
Advanced	Option to enable adding a script for the tab visibility. By default, this check box is cleared.
Visible(Script)	Script for the tab visibility. ○ If the script returns true, the tab is visible on the standard ticket page. ○ If the script returns false, the tab is not visible on the standard ticket page. **Note:** This field appears only when the **Advanced** check box is selected.
Visible	Conditions for the tab visibility. This is not displayed if the **Advanced** check box is selected.
Widget	Widget that should be displayed in the tabs section. This field appears only when **Custom** is selected from **Type**.
Widget parameters	Comma-separated list of tab widget parameters. This field appears only when **Custom** is selected from **Type**.

7. Select **Submit**.
8. On the Ticket Configuration form, select **Update**.

Result
A Teams Chat tab is added in each record of the Employee Center My Request page for the configured ticket type or table.

Include On-call scheduling users to initiate Microsoft Teams chat

Users who are associated with On-Call Scheduling will be displayed on the Selected column in **Start Microsoft Teams Chat** modal.

When initiating a Microsoft Teams chat, users who are part of On-Call Scheduling groups are automatically included in the Selected column of the Start Microsoft Teams Chat modal.

sn_tcm_collab_hook.on_call_tables_for_start_chat_action system property is created to support this functionality. You can extend this functionality to modify the tables and requests that determine which on-call users are included.

For more information on On-Call Scheduling, see On-Call Scheduling.

Extend On-Call Scheduling users to initiate Microsoft Teams Chat

View the list of On-Call Scheduling users in Start Microsoft Teams chat for a change, request, or a request item.

Before you begin
Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The list of properties in the System Properties [sys_properties] table appears.

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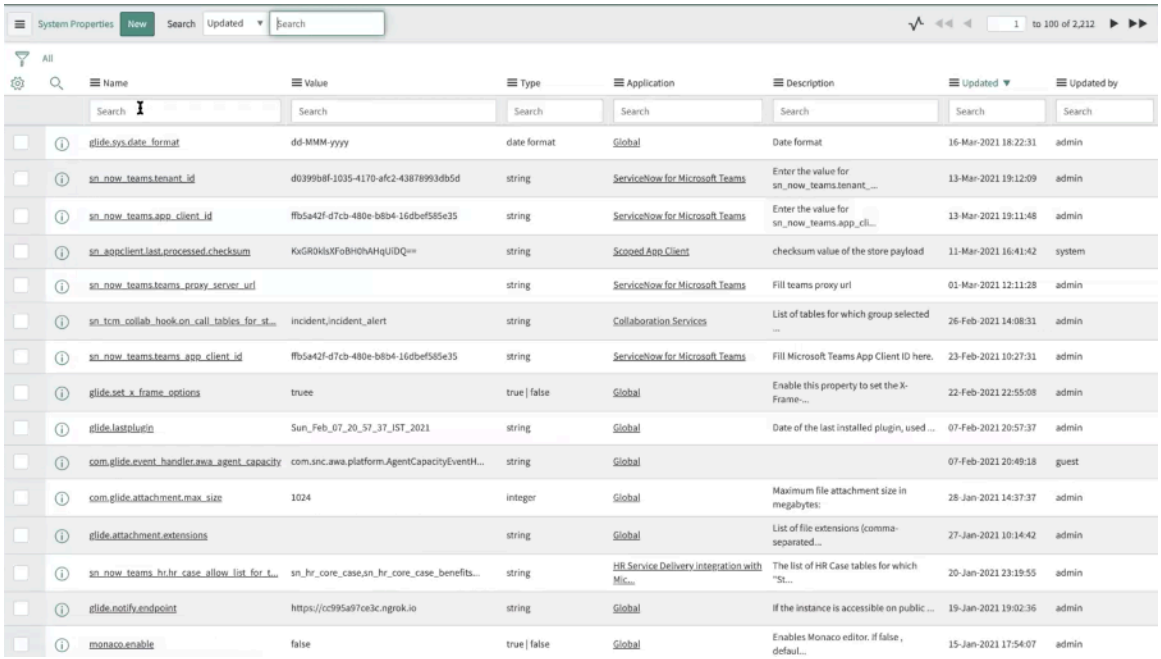
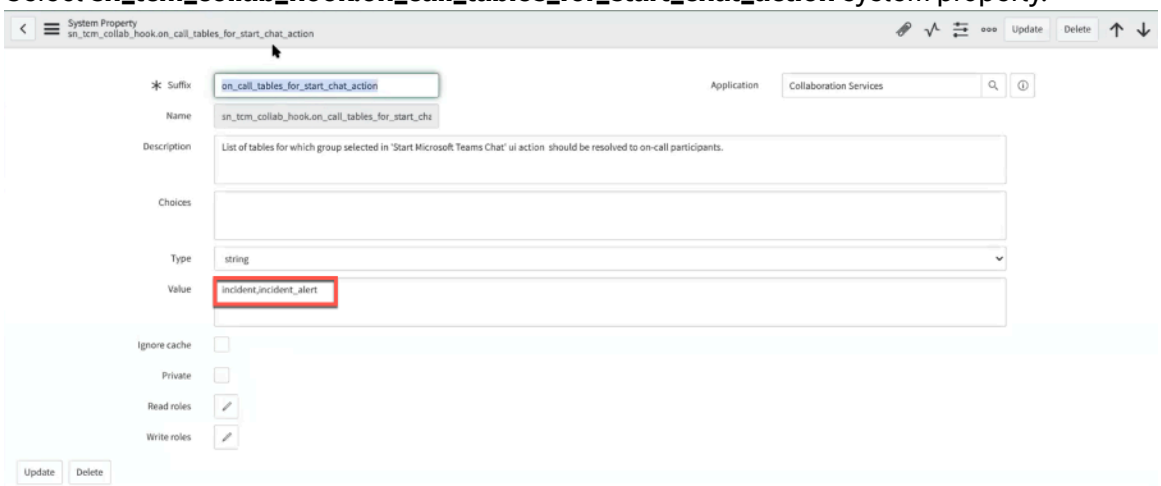


2. In the Name search field, enter `sn_tcm_collab_hook.on_call_tables_for_start_chat_action`.
3. Select **sn_tcm_collab_hook.on_call_tables_for_start_chat_action** system property.



4. In the Value field, provide the tables to which you must extend the functionality. Example: change, request.
5. Select **Update**.

Set up Chat to call

Set up the chat to call functionality in your instance to enable the agents to collaborate with the requester to resolve the issue.

The Chat to call functionality helps the requester to quickly get the resolution for their issues.

Here is the flow-diagram of the chat to call functionality:

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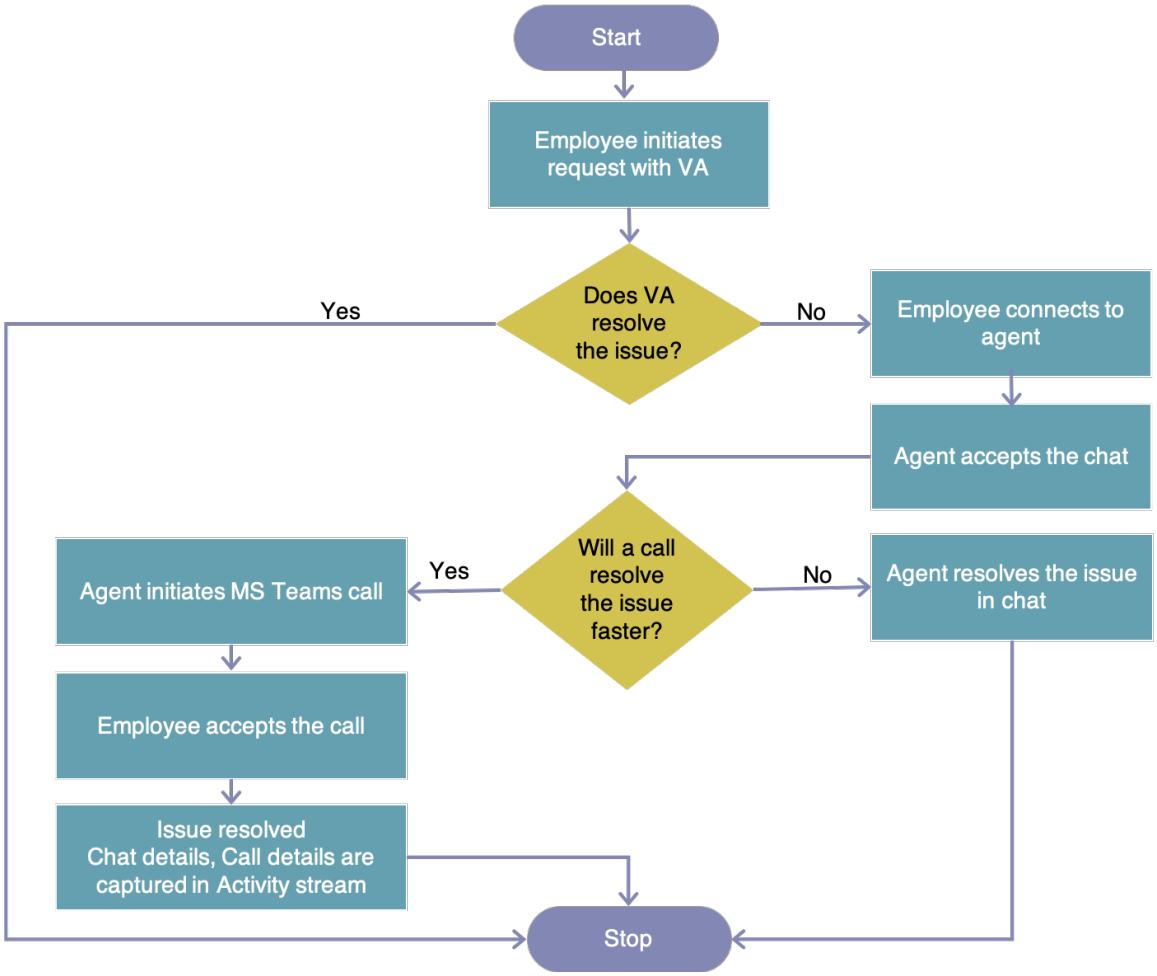

To enable the Chat to Call functionality you must install the Workspace Agent chat, Notify, and the Notify connector for Microsoft Teams plugins in your instance. You must also install ServiceNow for Teams installed with Virtual Agent or Virtual Agent Lite. For more information, refer the following topics:

- Set up Agent Chat
- Activate Notify
- Notify connector for Microsoft Teams

For more information on the workflow for chat to call flow, refer Promote chat to a call from workspace.

Access ServiceNow for Microsoft Teams app

Enables users to interact with the agents from Microsoft Teams application.

Before you begin

Role required: admin

About this task

To receive notifications from Virtual Agent, users must link their accounts to Microsoft Teams. Guest users can't receive notifications.

Procedure

1. Launch Microsoft Teams application.
2. Click **Apps**.

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3. In the apps search field, enter `ServiceNow for Microsoft Teams`.
4. Click **ServiceNow for Microsoft Teams** app.
5. Click **Open**.

Result

The **ServiceNow for Microsoft Teams** app is successfully installed in your Microsoft Teams application.

Create custom email field to initiate Microsoft Teams chat

Create a custom email field to use Microsoft Teams app to initiate chat conversation for the agents to resolve the IT and HR related issues of the users.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Security** > **Users and Groups** > **Users**.
2. Click a user.
3. Right-click on the form header and select **Configure** > **Form Layout**.
4. In the Create new field section, fill in the fields.

Create new field

Field	Description
Name	Enter the name of the field as you want it to appear on forms and lists. Example: User Principal Name.
Type	Select a field type as **String**.
Field length	Select a field length. This field is visible only for certain field types.

5. Click **Add**.

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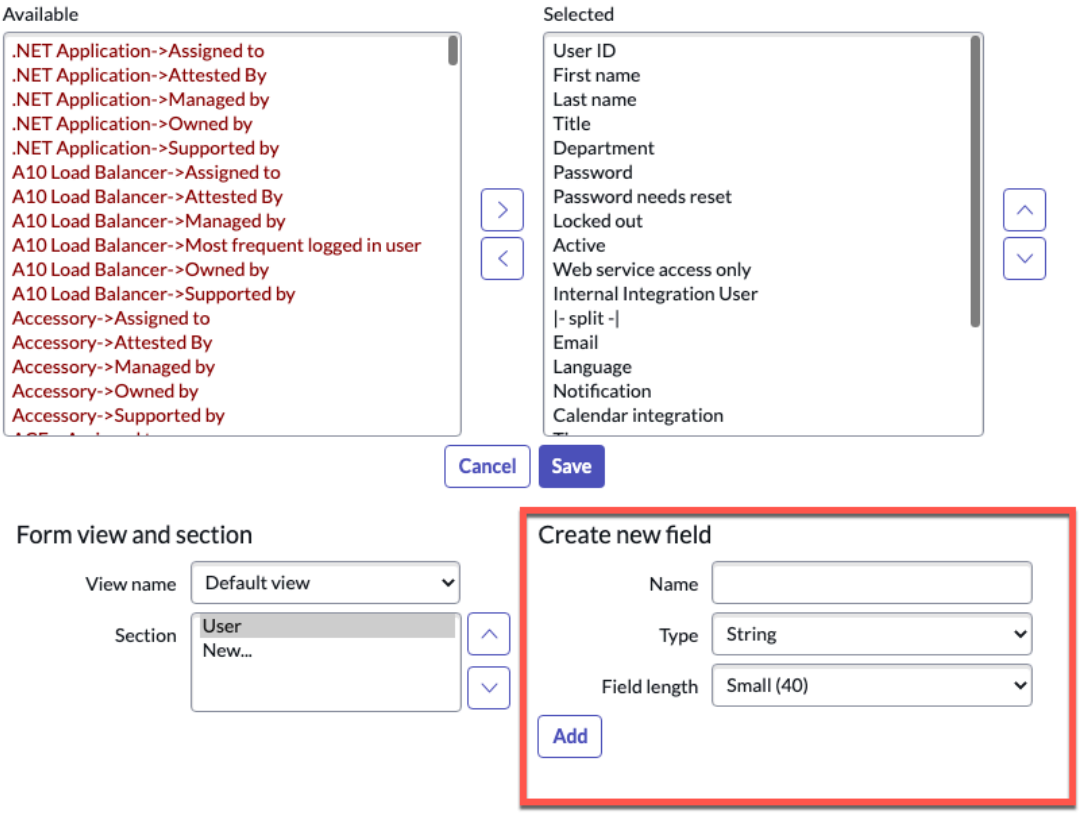
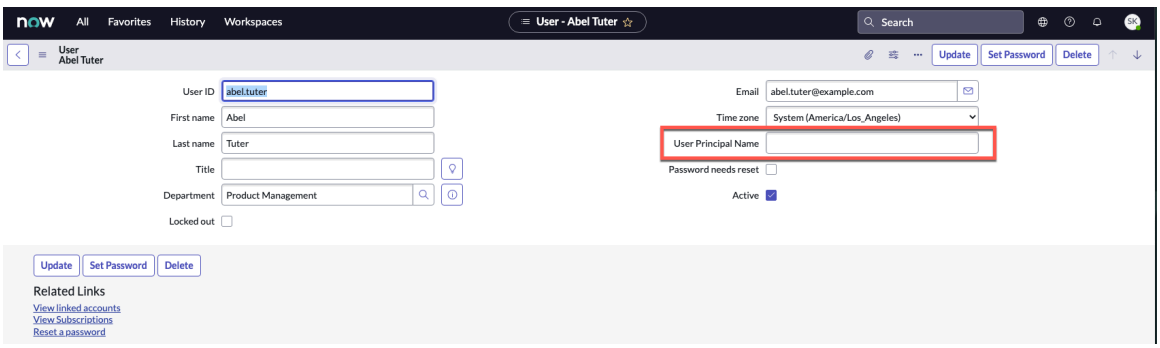


6. In the Selected slush bucket column, move the field in the desired location on the form.
7. Click **Save**.

   The field now appears on the form in the designated location.



   The admin must enter the email used for Microsoft Teams in this field.

   You need to configure the newly created field value as the default field for initiating chats with the employee in Microsoft Teams.

8. Right-click on the field and click **Show <value of the field name>**.

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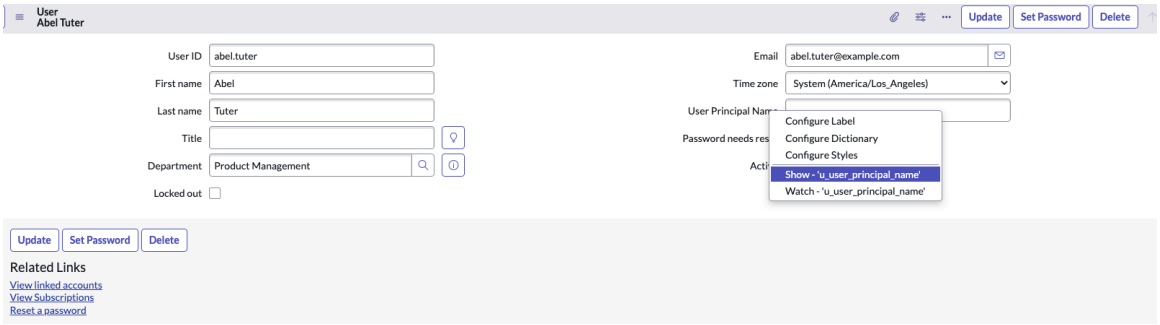
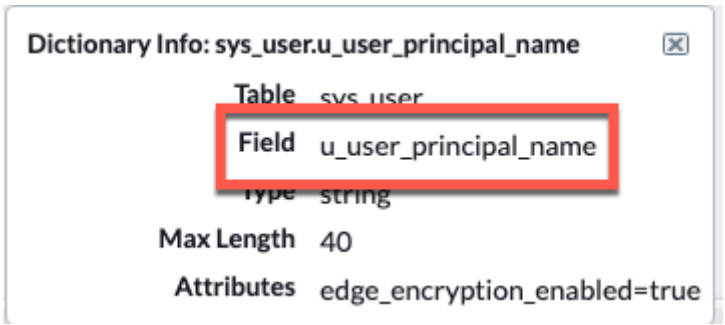
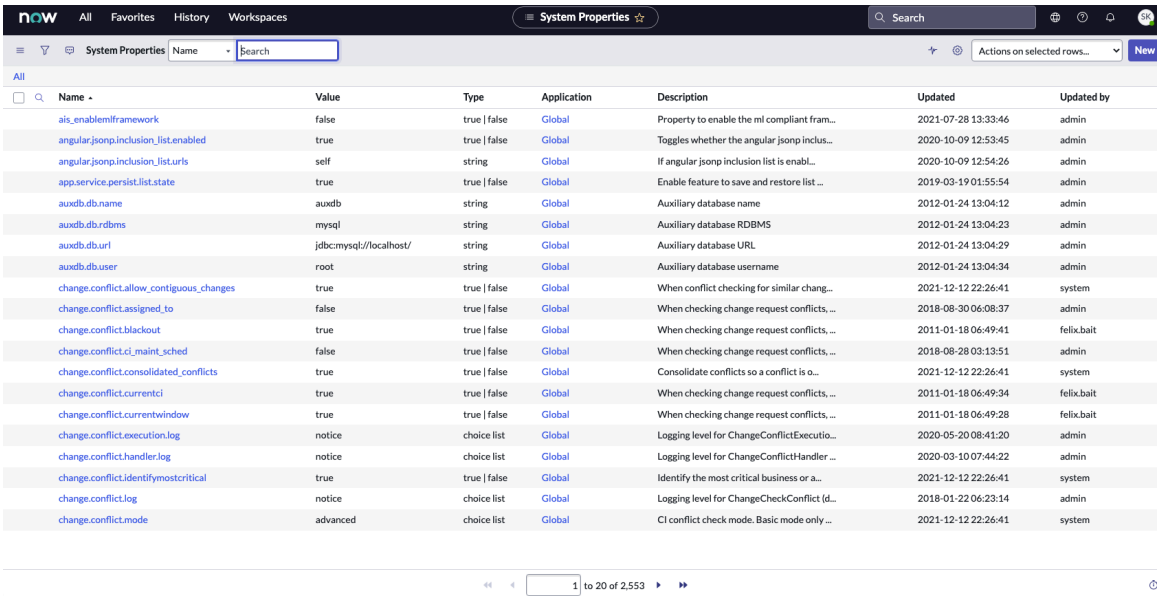


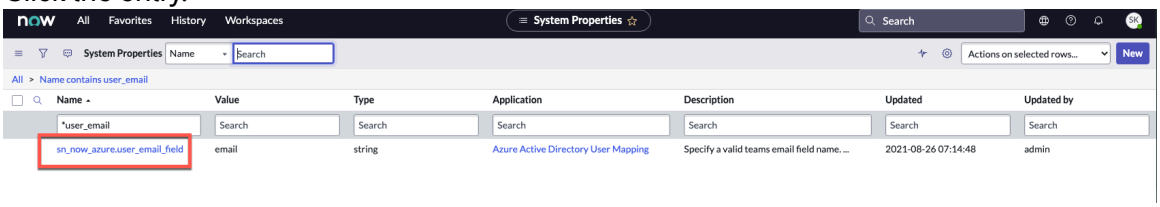
The dictionary info of the field name can be viewed.



9. Right click the **Field** and copy the value.
10. In the search field, enter `sys_properties.LIST` to view the system properties.



11. In the Name column, search for `*user_email` property.
12. Click the entry.



If the record is not editable, click **Edit** on the header to edit the record.

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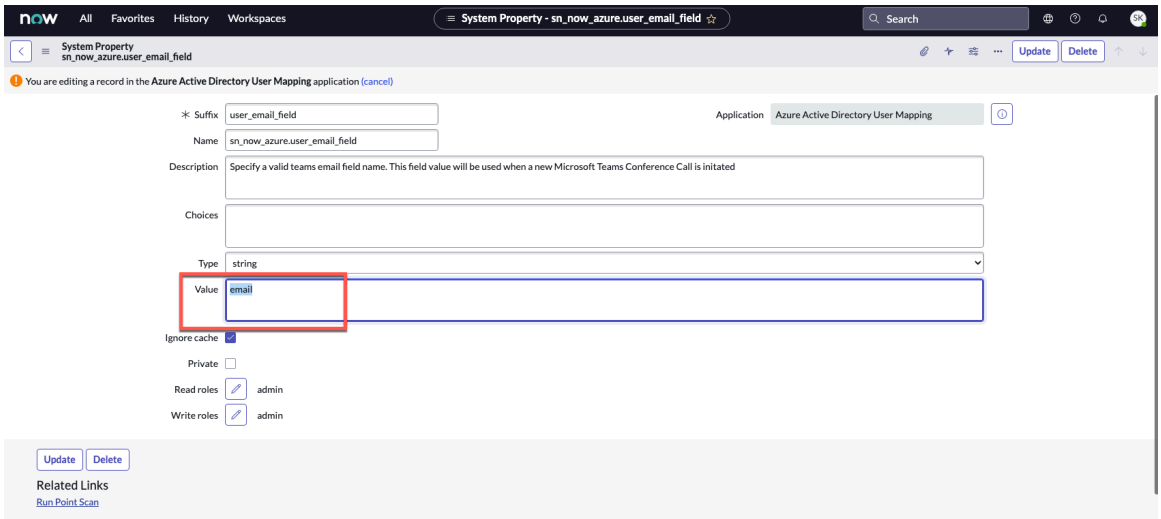
13. Update the **Value** field with the new field name that is created.

    The default value is **email**.



14. Click **Update**.

> **Note:** Ensure that the email address for all the users for the newly created field is updated with the email associated with Microsoft Teams app.

Unfurl the web links in Microsoft Teams chat

ServiceNow for Microsoft Teams supports link unfurling. Link unfurling generates a content-rich preview when a supported link is shared in a conversation with a user in Microsoft Teams.

To enable link unfurling, you must create and download the manifest file and upload the file to Microsoft Teams. To download the manifest file, refer Create and download the manifest file for pre-published apps.

In a conversation in Microsoft Teams application, the content in the URL appears as a preview to the user in the form of an adaptive card. The preview is generated based on the content shared in the URL.

The content in the adaptive card will be shown only for public knowledge articles, and the catalog items. However, the adaptive card shows generic content for all private links in the chat conversations.

Enable link unfurling

Enable link unfurling in the manifest file to preview the content of the link shared in the chat conversations.

Before you begin

Role required: admin

Procedure

1. Create and download manifest file.

   Enable the link unfurling option in the **Generic info** tab while creating the manifest file.

   For more information, see Create and download the manifest file for pre-published apps.

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2. Update the value of the ServiceNow for Teams app ID from Microsoft Teams admin center in your ServiceNow instance.
   For more information, see Update the app ID in the ServiceNow instance.

Configure the system property to open the unfurled links

Configure the property to view the content when the user clicks the adaptive card shared in the Microsoft Teams chat conversation.

Before you begin

Role required: admin

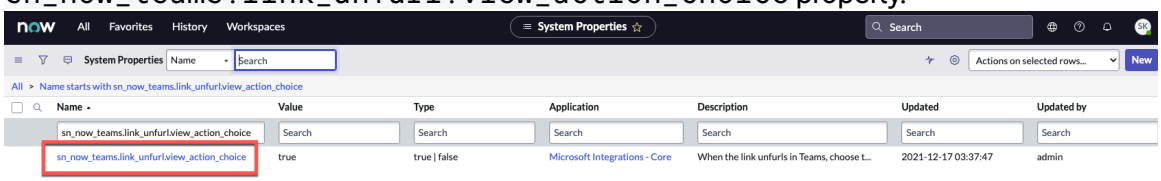
About this task

Setting the property to true opens all the configured portal-related links within the application. All the non-portal links are opened in the browser.

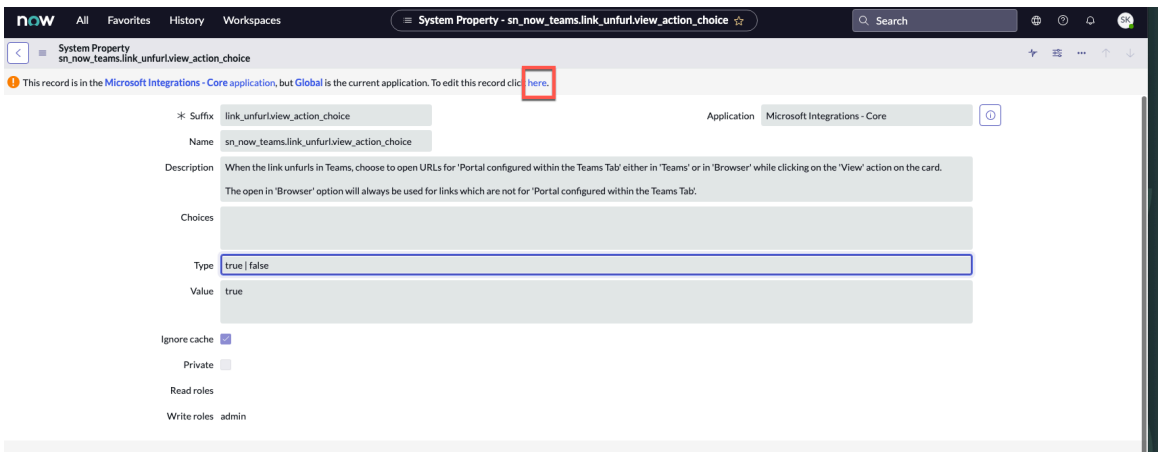
By default, this property is set as true. If you set the property as false, all the links shared in the chat conversations will be opened in the browser.

Procedure

1. In your ServiceNow instance, search for sys_properties.list.
2. In the Name column, search for `sn_now_teams.link_unfurl.view_action_choice` property.



3. Click the property.
   If the record is uneditable, click here to edit the record.



4. Update the **Value** field as `false` to view the links in a browser.

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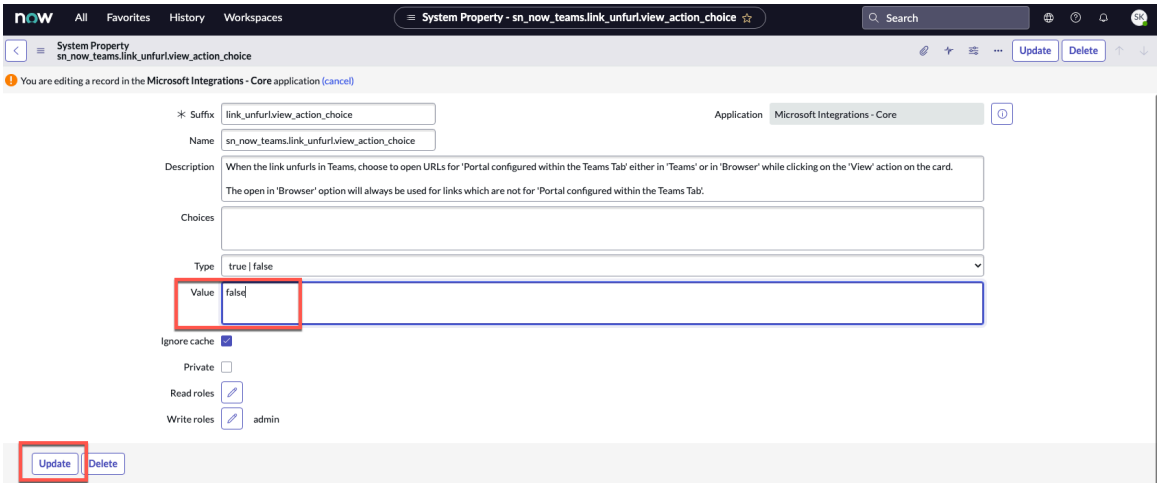

5. Click **Update**.

Configure HR Service Delivery integration with Microsoft Teams

Complete the following procedures to configure the HR Service Delivery integration with Microsoft Teams.

Review the active notifications for Microsoft Teams

The notifications added by ServiceNow for Microsoft Teams, might duplicate existing notifications in your instance. Review and disable any duplicate notifications to avoid notifying users multiple times for the same event.

Before you begin

Role required: admin

About this task

You will find HR Case as a duplicate notification after installing the HR Service Delivery integration with Microsoft Teams application. You must disable one of the notifications by setting it to inactive.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Notifications** > **Provider Notifications**.

   You can also navigate to **All** > **System Notifications** > **Provider** > **Notifications**.

2. In the Notifications list, search for the **HR Case** notification.
3. Select one of the **HR Case** notifications.
4. Clear the **Active** field.
5. Select **Update**.

Enable Virtual Agent notifications for HR Service Delivery

Configure system properties to enable Virtual Agent notifications in Microsoft Teams.

Before you begin

Role required: admin

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About this task

Note: If your first installation of HR Service Delivery for Microsoft 365 is version 3.4.0, Virtual Agent notifications are enabled by default. The following scenario is only applicable if you upgrade from older versions of the plugin.

After upgrading to HR Service Delivery for Microsoft 365 version 3.4.0, you must configure a system property to enable Virtual Agent notifications.

Procedure

1. In the **All** menu, enter `sys_properties.list`.
   The System Properties table appears.
2. In the name column, enter `*sn_now_teams`.
3. For the *`sn_now_teams_hr.enable_va_comment_notification`* property, set the value to `true`.
   The default value of the property is **true**. If you've upgraded from an earlier version of HR Service Delivery for Microsoft 365, the value is **false**.
   The comment notifications for all HR Core and HR Task tables are enabled.

What to do next

To configure LLM actionable provider notifications, refer to Configure LLM based provider notifications for HR.

Configure LLM based provider notifications for HR

Enable LLM-based actionable provider notifications for HR.

Before you begin

Ensure the following:

- You have the latest version of the HR Service Delivery for Microsoft 365.
- The following LLM Assets have their **Status** as **Published** and are **Active**:
  - _view_approval_details_LLM_
  - _view_add_comments__LLM_

  To check, navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.

Role required: admin

Procedure

1. Navigate to **ServiceNow for Microsoft 365** > **Notifications** > **Provider Notifications**.
2. In the Notifications list, select **Approvals - Actionable**.

   a. Scroll down to the Related links, select **Actions** tab.
   Verify that two **View Details** notification actions are listed.

   Important: If only one action is listed, you must update to the latest version of the application.

   b. In the Related links, select **Link Actions to Content**.

   c. Select **Approvals link action**.

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d. Select the lock icon next to the **Actions** field.

e. From the list of actions, select the other **View Details** action as well.
Verify that the **Actions** field displays two **View Details** actions.

f. Select **Update**.

g. Save the form.

3. In the Notifications list, select **Incident commented actionable**.

a. Scroll down to the Related links, select **Actions** tab.
Verify that two **View last comment** notification actions are listed.

> **Important:** If only one action is listed, you must update to the latest version of the application.

b. In the Related links, select **Link Actions to Content**.

c. Select **Incident commented content actions**.

d. Select the lock icon next to the **Actions** field.

e. From the list of actions, select the other **View last comment** action as well.
Verify that the **Actions** field display two **View last comment** actions.

f. Select **Update**.

g. Save the form.

What to do next

You can customize the fields displayed in approval notifications. For more information, see Customizing approval notification fields.

Configure Request-based chats to import messages from Microsoft Teams to ServiceNow

Configure request-based chats for IT Service Management integration with Microsoft Teams and HR Service Delivery integration with Microsoft Teams applications enable the system to auto import the chat conversations between the agents and the employees.

If you are installing the ServiceNow for Microsoft Teams in your environment, the auto-import functionality is applicable by default for the following tables.

- HR Core task (sn_hr_core_task)
- HR Life events Case (sn_hr_le_case)
- HR Core case (sn_hr_core_case)
- Request Item (sc_req_item)
- Task (sc_task)
- Incident (incident)
- Request (sc_request)
- Change request (change_request)

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The admin can extend the auto import feature to the other tables as required. For more information see, Create requester mapping.

If you are upgrading your ServiceNow instance to IT Service Management integration with Microsoft Teams 2.2.0 or HR Service Delivery integration with Microsoft Teams 2.2.0, you must manually enable the auto import feature.

Functionality of auto importing messages

All the chat messages from Microsoft Teams will be auto imported to the ServiceNow instance at an interval of 30 minutes. The system looks for all the new messages across all the chats and import the messages to ServiceNow instance.

To prevent polling from running indefinitely on inactive conversations, if there are no new messages, the polling interval will gradually lengthen until, eventually, polling stops.

The system verifies the record for new messages for every 30 minutes. If there are no new messages, the system checks for the new messages for an interval of one hour, two hour, four hour and eight hours. If there are no new messages in an interval of eight hours for seven days, the Auto Import polling activity is disabled.

If there is any message during any of the intervals, the auto import timer will look for the new messages in the next interval, and import the messages. The timer is then reset to 30-minutes interval.

System Limits

The system imports a maximum of 500 active chats in a 30-minute interval. If there are more than active 500 chats the system will not auto-import the new chat records for the 30-minute interval.

The system executes a maximum of 10,000 sub-flows to import the chats for an interval of 30 minutes, 1 hour, 2 hour, 4-hour, 8-hour intervals. This is a count of all the active subflows that auto-import the messages into ServiceNow.

If the system reaches the limit, a message is displayed to the agent that the system level is reached and the chat can't be auto imported on the **Start Microsoft Teams Chat** modal.

When the ticket is closed, the system will trigger auto import for one last time posts the new messages in the Work notes (Chat history).

If there is an interaction record associated with the parent record then interaction record is also closed. The chat record will also be closed as part of this flow.

If you want to continue using the default configuration, you can skip the following procedures to extend the auto-import functionality. However, if you want to extend the auto-import functionality to other tables, perform the steps mentioned in the topics below.

Configure the chat to enable auto-import

Create a chat configuration to automatically import the chats between the agents and the requesters for additional tables to extend the auto import functionality.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Chat Administration** > **Chat Configuration**.
2. Click **Default** option to view the default OOB configuration.

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Note: If you want to auto-import chats for certain conditions, create a condition.

3. Navigate to **ServiceNow for Microsoft Teams** > **Chat Administration** > **Chat Configuration**.
4. Click **New**.
5. On the form, fill the fields.

Chat configuration

Field	Description
Name	Value for the configuration.
Order	Order for the configuration. You can define multiple chat configurations for a single table. The system executes the query based on the descending order.
Active	Option to activate the configuration. Select the check box to activate the configuration.
Auto Import	Option to automatically import the chat. Select the check box to automatically import the chat.
Default	Option to keep the configuration as default. **Note:** You cannot define multiple default values for chat configuration.
Table	Option to select the auto-import for a table.
Inherit	Extend and apply to the child tables.
Conditions	Option to define a condition for a chat to be auto-imported.
Opening message	Option to provide a text message that displays to the agent when the agent initiates a chat. This field is enabled only if the **Auto Import** option is selected.

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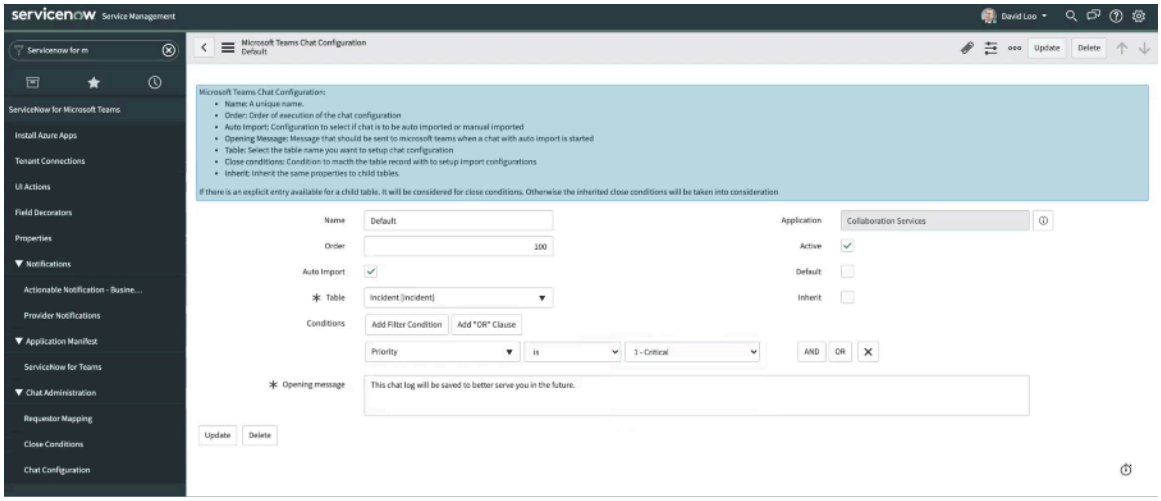

6. Click **Submit**.

   The chat configuration defined will be applicable only for the table selected. You can extend the chat configuration to other tables by creating another chat configuration record.

Create requester mapping

Create a requester mapping to extend the auto-import functionality to other tables.

Before you begin

Role required: admin

Note:

If there is no requestor mapping defined for a table, the interaction records will not be created. An error log is created for the admin to notify that the requestor mapping is not defined for a table.

A requestor-mapping record defines which field, in any given table, is the field representing the requestor of a ticket.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Chat Administration** > **Requestor Mapping**.
2. Click **New**.
3. On the form, fill in the fields.

Requestor mapping

Field	Description
Table	Table to which the requestor mapping (auto-import feature) should be applicable.
Requestor field	Field to select the requestor for a record.
Inherit	Extend and apply the auto-import feature to the child tables.
Active	Option to activate the requestor-mapping record.

4. Click **Submit**.

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Configure close condition

Configure the condition to exclude the chat conversation from auto importing.

Before you begin

Role required: admin

About this task

When a ticket is set to inactive, the system does one final poll for any messages in the chat, removes the participants such that no further messages about the ticket can be exchanged in the chat, and then stops polling that chat. This is determined by the "active" field on a table being set to "false".

For any table with an active field, this behavior works automatically. If your custom application does not use an "active" field for determining whether the ticket remains active, define an alternate condition that can be used to denote the ticket as being closed or inactive.

Alternately, to adhere to platform standards, consider adding an active field to your custom application and maintaining the state of that field in accordance with the business logic of your application.

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Chat Administration** > **Close Conditions**.
2. Click **New**.
3. On the form, fill in the fields.

Close condition

Field	Description
Table	Option to select a table to which the requester mapping (auto-import feature) should be applicable.
Inherit	Extend and apply the auto-import feature to the child tables.
Active	Option to activate the requester-mapping record.
Close conditions	Condition builder to define a condition that the record is closed.

4. Click **Submit**.

Note:

If you are creating a close condition for a new table, ensure to create business rule for close condition. For more information, refer Configure business rule for close condition.

Configuring Employee Center

Use the Employee Center within Microsoft Teams or embed a custom portal in Microsoft Teams.

Employee Center appears in Microsoft Teams when you install and configure Employee Center v23.0.5 or a higher version in your environment. For more information on Employee Center, see Employee Center.

If you install Employee Center Pro in your environment, the Employee Center Pro is available in Microsoft Teams.

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If you don't install Employee Center in your environment, the Employee Service Portal is displayed in the Microsoft Teams application. Alternatively, you can embed a custom portal in Microsoft Teams.

Embed a custom portal

Embed your custom portal to replace the Employee Center tab in Microsoft Teams by configuring the system property. The custom portal shows up in the Employee Center tab in Microsoft Teams.

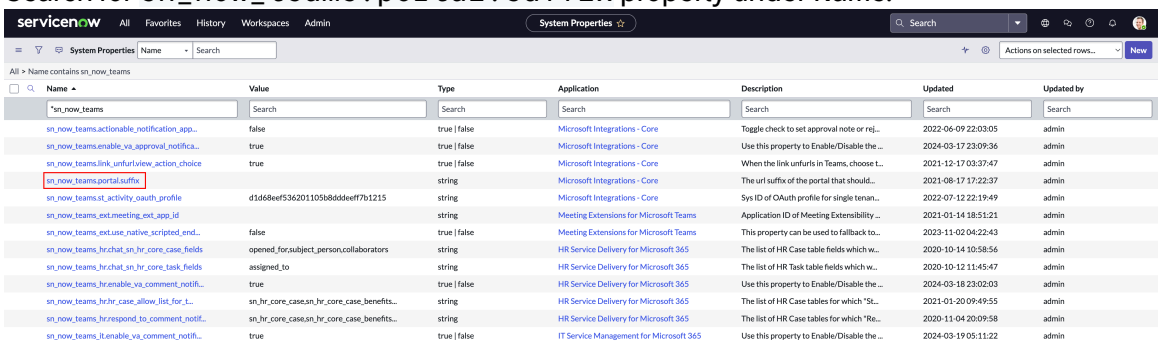
Before you begin

Role required: admin

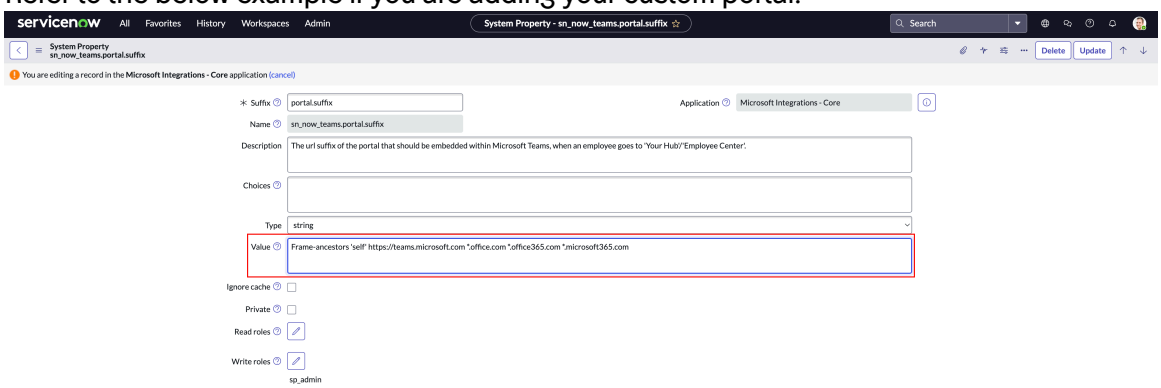
If you're using a custom portal rather than the Employee Center, you can replace the embedded Employee Center with your custom portal, so that it's accessible within Microsoft Teams. The following steps take you through the configuration to embed your portal.

Procedure

1. In the navigation pane, enter `sys_properties.list`.
2. Search for `sn_now_teams.portal.suffix` property under Name.



3. Select **sn_now_teams.portal.suffix**.
4. Enter the value of your custom portal in the **Value** field.
   Refer to the below example if you are adding your custom portal:



5. Select **Update**.
6. Create a custom header for the embedded portal after you configure your custom portal.

   For more information on adding header configuration, see Configure HTTP response headers.

   a. In the Navigator pane, type `sys_response_header.list`.

   b. Select **New**.

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c. On the HTTP Response Header form, fill in the following fields based on your requirement.
   - Active
   - Application
   - Record
   - Description

d. Enter the following field values.

Field values for the HTTP Response Header form

Field	Value
Applies to	Specify Type
Type	Service Portal [sp_portal]
Name	Content-Security-Policy
Value	Frame-ancestors 'self' https://teams.microsoft.com **Important:** To enable the custom portal in all Microsoft 365 apps, add the following domains to the Value field. - *.office.com - *.office365.com - *.microsoft365.com - *.cloud.microsoft For example: `Frame-ancestors 'self' https://teams.microsoft.com *.office.com *.office365.com *.microsoft365.com *.cloud.microsoft`

e. Select **Submit**.

Hide the chat button on the custom portal

Hide the chat option for your custom portal that appears in the Employee Center tab within Microsoft Teams.

Before you begin

Ensure that you set the *com.glide.cs.advanced-chat-popover* system property to false.

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **CSS**.
2. Select the custom CSS that you want to edit.
3. Select the **click here** link to edit the CSS.

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4. Paste the following code in the **CSS** field.

> **Note:** In the following code example, the `.embedded-experience .sp-ac-btn` element specifies the chat button and the `display: none;` property hides the button. You can customize the code based on your requirement.

```
/* Embedded portal */

.embedded-experience .sp-ac-btn {
        display: none;
    }
```

5. Select **Update**.
6. Refresh the custom portal tab in Microsoft Teams.

Hide the logout button on the custom portal

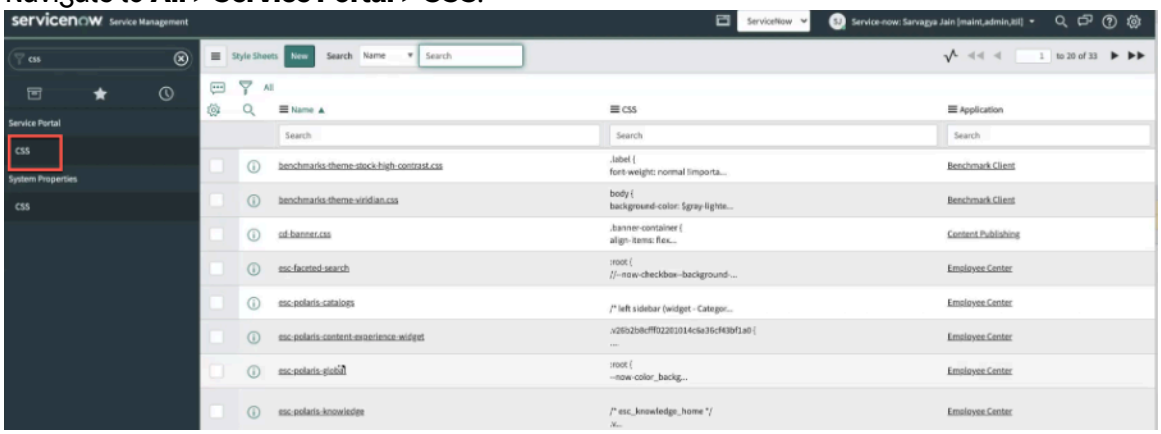
You can hide the logout option for your custom portal that appears in the Employee Center tab within Microsoft Teams.

Before you begin

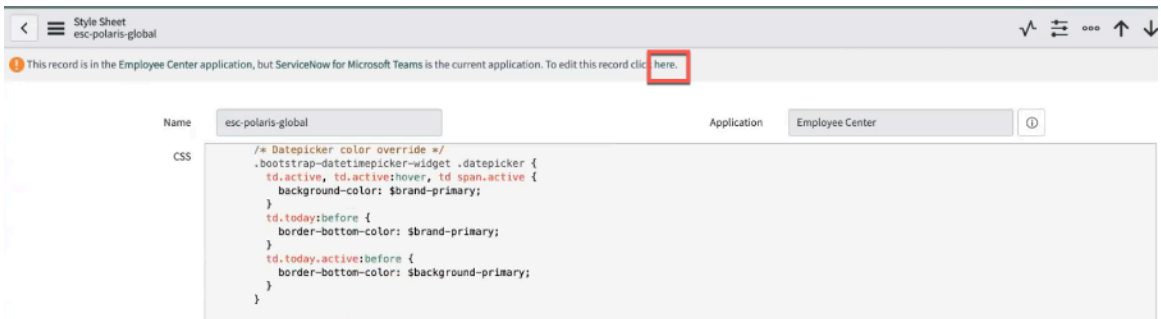
Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **CSS**.



2. Click on your custom CSS.
3. Click **here** to edit the CSS.



4. To disable the logout button from Microsoft Teams desktop application.

   Customize the following code as required and paste in the CSS.

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```
/* Embedded portal */

/*The code shared to disable the logout button is an example.
 You need to customize as required to disable logout button.*/

.embedded-experience .avatar-drop-down .header-menu-item:last-c
hild {
        display: none;
      }
```

5. To disable the logout button from Microsoft Teams mobile application.

   Customize the following code as required and paste in the CSS.

```
/* Embedded portal */

/*The code shared to disable logout button is an example. You
 need to customize as required to disable logout button.*/

.embedded-experience .impersonate-and-logout {
          div > ul > li:last-child {
            display: none !important;
         }
      }
```

6. Click **Update**.
7. Refresh the custom portal tab in Microsoft Teams.

Microsoft Teams Chat widget in Employee Center

The Teams Chat widget enables employees to view or continue chats with agents and view and access the content of attached files in the Employee Center. This widget is available through the HR Service Delivery integration with the Microsoft Teams application.

Using the Teams Chat widget, employees can access ticket-specific Microsoft Teams chat conversations in Employee Center. If you are installing ServiceNow for Microsoft Teams in your environment, the Teams Chat widget feature is applicable to the following tables:

- HR Core task (sn_hr_core_task)
- HR Life events Case (sn_hr_le_case)
- HR Core case (sn_hr_core_case)

The admin can extend the Teams Chat widget feature to other tables.

Employees can take the following actions associated with their tickets:

- View the chat conversations with agents.
- View and access the content of attached files shared with agents.
- Continue a chat conversation with the agent handling the ticket using the Microsoft Teams application without having to exit the Employee Center.
- View the list of people involved in their chat conversation.

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Add Teams Chat widget

Add the Teams Chat widget to enable employees to view or continue chats with agents and view and access the content of attached files in the Employee Center.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. On the Ticket Configurations page, select **New**.
3. On the Ticket Configuration form, fill in the fields.
   For more information about the field descriptions, see Configure the standard ticket page.
4. Right-click in the page header and select **Save**.
5. From the Tab Configurations related list, select **New**.
6. On the Tab Configuration form, fill in the fields.

   Some fields require values specific to this task.

   - For the **Type** field, select **Custom**.
   - For the **Tab name** field, enter `Teams chat`.
   - For the **Widget** field, search for and select **Teams Chat**.

Tab Configuration form

Field	Description
Type	Tab type based on which a widget is displayed. Possible options are: ○ Activity ○ Associated Requests ○ Attachments ○ Custom ○ Variable Editor (Read-Only) ○ Variable Summarizer
Tab name	Name of the tab.
Application	Application associated with the ticket configuration.
Order	Order in which the tab should be displayed in the tabs section. The tab with the least order is the tab selected on the page load.
Advanced	Option to enable adding a script for the tab visibility. By default, this check box is cleared.
Visible(Script)	Script for the tab visibility. ○ If the script returns true, the tab is visible on the standard ticket page. ○ If the script returns false, the tab is not visible on the standard ticket page. **Note:** This field appears only when the **Advanced** check box is selected.

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Field	Description
Visible	Conditions for the tab visibility. This is not displayed if the **Advanced** check box is selected.
Widget	Widget that should be displayed in the tabs section. This field appears only when **Custom** is selected from **Type**.
Widget parameters	Comma-separated list of tab widget parameters. This field appears only when **Custom** is selected from **Type**.

7. Select **Submit**.
8. On the Ticket Configuration form, select **Update**.

Result
A Teams Chat tab is added in each record of the Employee Center My Request page for the configured ticket type or table.

Include On-call scheduling users to initiate Microsoft Teams chat

Users who are associated with On-Call Scheduling will be displayed on the Selected column in **Start Microsoft Teams Chat** modal.

When initiating a Microsoft Teams chat, users who are part of On-Call Scheduling groups are automatically included in the Selected column of the Start Microsoft Teams Chat modal.

The *sn_tcm_collab_hook.on_call_tables_for_start_chat_action* system property controls this functionality. You can extend this functionality to modify the tables and requests that determine which on-call users are included.

For more information on On-Call Scheduling, see On-Call Scheduling.

Extend On-Call Scheduling users to initiate Microsoft Teams Chat

View the list of On-Call Scheduling users in Start Microsoft Teams chat for a change, request, or a request item.

Before you begin
Role required: admin

Procedure
1. In the navigation filter, enter `sys_properties.list`.
   The list of properties in the System Properties [sys_properties] table appears.

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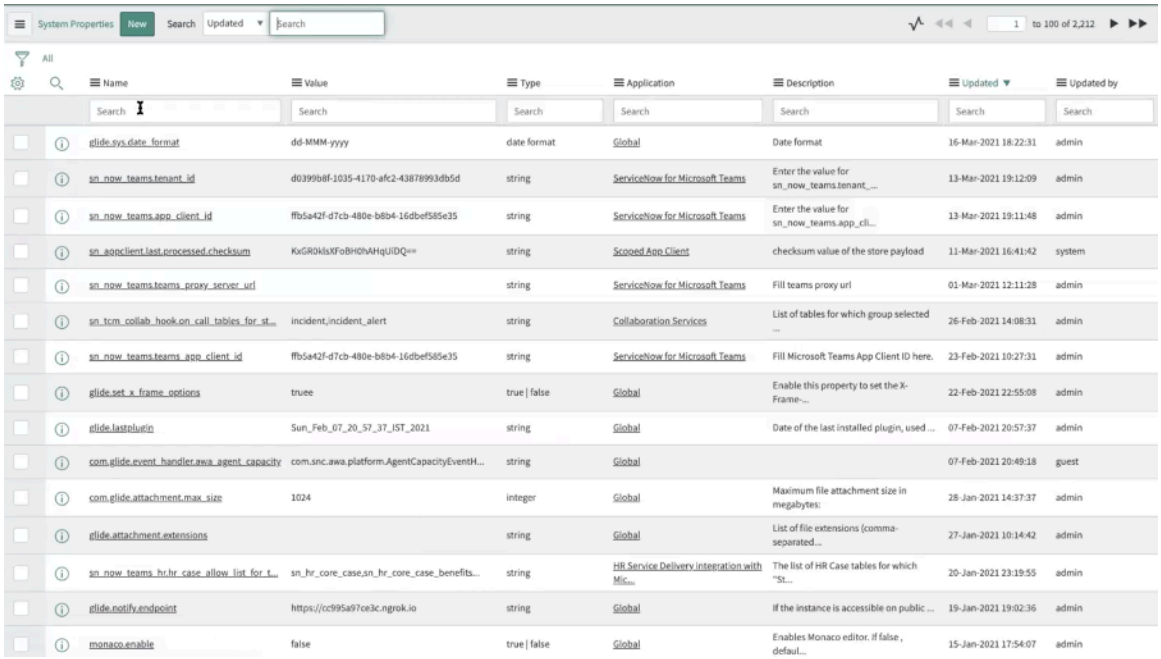
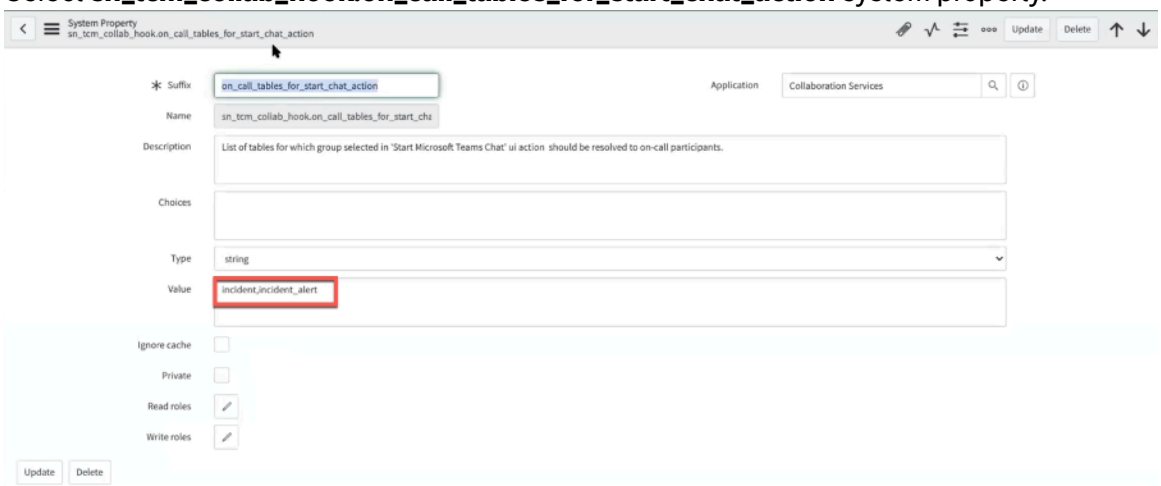


2. In the Name search field, enter `sn_tcm_collab_hook.on_call_tables_for_start_chat_action`.
3. Select **sn_tcm_collab_hook.on_call_tables_for_start_chat_action** system property.



4. In the Value field, provide the tables to which you must extend the functionality. Example: change, request.
5. Select **Update**.

Set up Chat to call

Set up the chat to call functionality in your instance to enable the agents to collaborate with the requester to resolve the issue.

The Chat to call functionality helps the requester to quickly get the resolution for their issues.

Here is the flow-diagram of the chat to call functionality:

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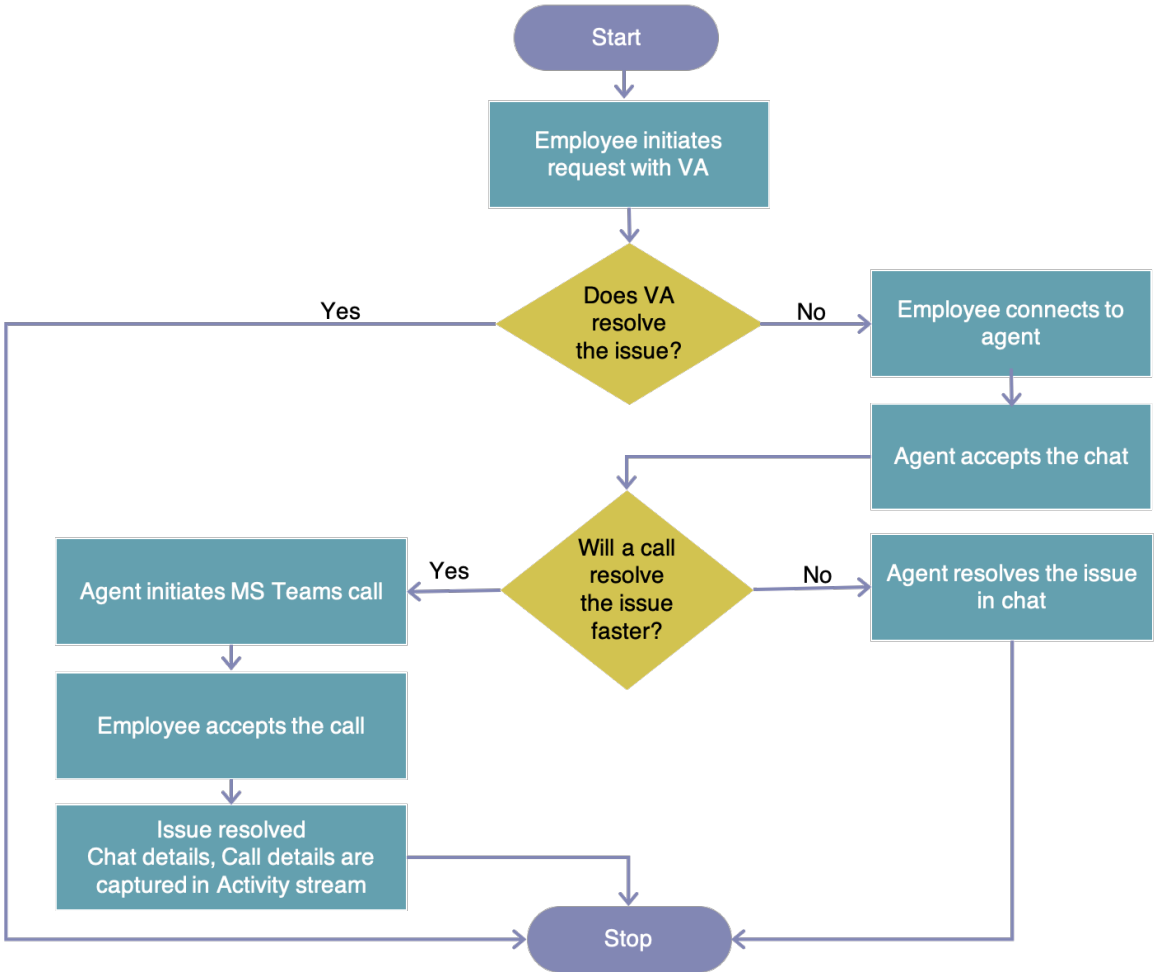

To enable the Chat to Call functionality you must install the Workspace Agent chat, Notify, and the Notify connector for Microsoft Teams plugins in your instance. You must also install ServiceNow for Teams installed with Virtual Agent or Virtual Agent Lite. For more information, refer the following topics:

- Set up Agent Chat
- Activate Notify
- Notify connector for Microsoft Teams

For more information on the workflow for chat to call flow, refer Promote chat to a call from workspace.

Access ServiceNow for Microsoft Teams app

Enables users to interact with the agents from Microsoft Teams application.

Before you begin

Role required: admin

About this task

To receive notifications from Virtual Agent, users must link their accounts to Microsoft Teams. Guest users can't receive notifications.

Procedure

1. Launch Microsoft Teams application.
2. Click **Apps**.

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3. In the apps search field, enter `ServiceNow for Microsoft Teams`.
4. Click **ServiceNow for Microsoft Teams** app.
5. Click **Open**.

Result

The **ServiceNow for Microsoft Teams** app is successfully installed in your Microsoft Teams application.

Create custom email field to initiate Microsoft Teams chat

Create a custom email field to use Microsoft Teams app to initiate chat conversation for the agents to resolve the IT and HR related issues of the users.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Security** > **Users and Groups** > **Users**.
2. Click a user.
3. Right-click on the form header and select **Configure** > **Form Layout**.
4. In the Create new field section, fill in the fields.

Create new field

Field	Description
Name	Enter the name of the field as you want it to appear on forms and lists. Example: User Principal Name.
Type	Select a field type as **String**.
Field length	Select a field length. This field is visible only for certain field types.

5. Click **Add**.

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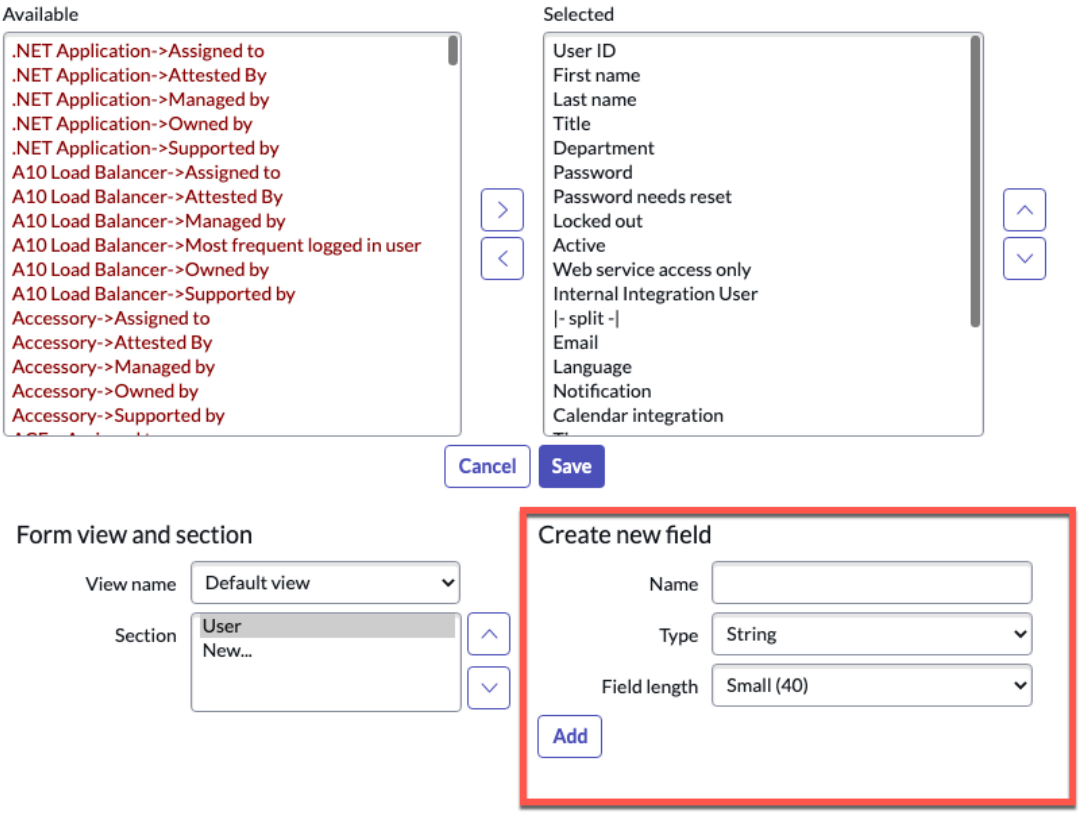
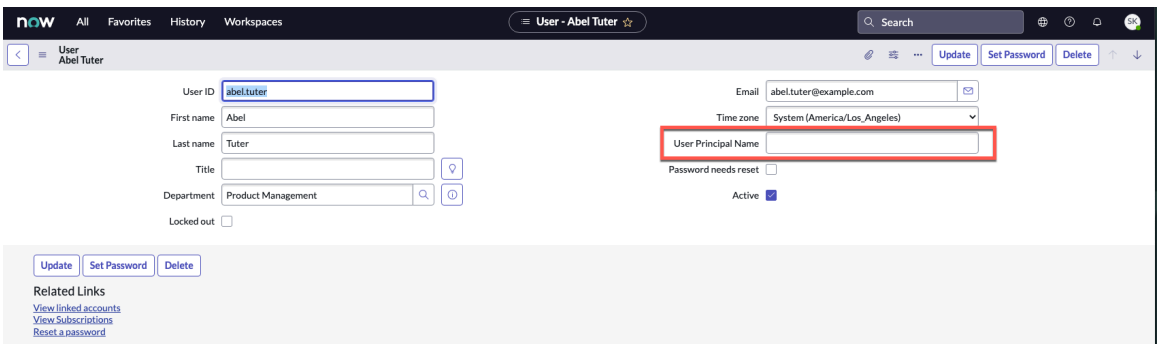


6. In the Selected slush bucket column, move the field in the desired location on the form.
7. Click **Save**.

   The field now appears on the form in the designated location.



   The admin must enter the email used for Microsoft Teams in this field.

   You need to configure the newly created field value as the default field for initiating chats with the employee in Microsoft Teams.

8. Right-click on the field and click **Show <value of the field name>**.

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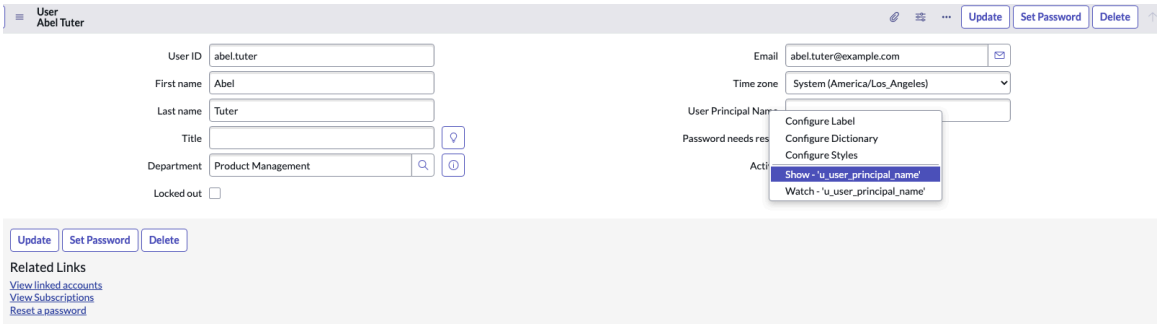
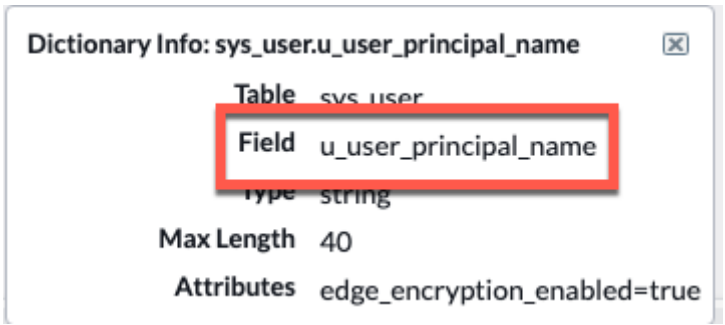
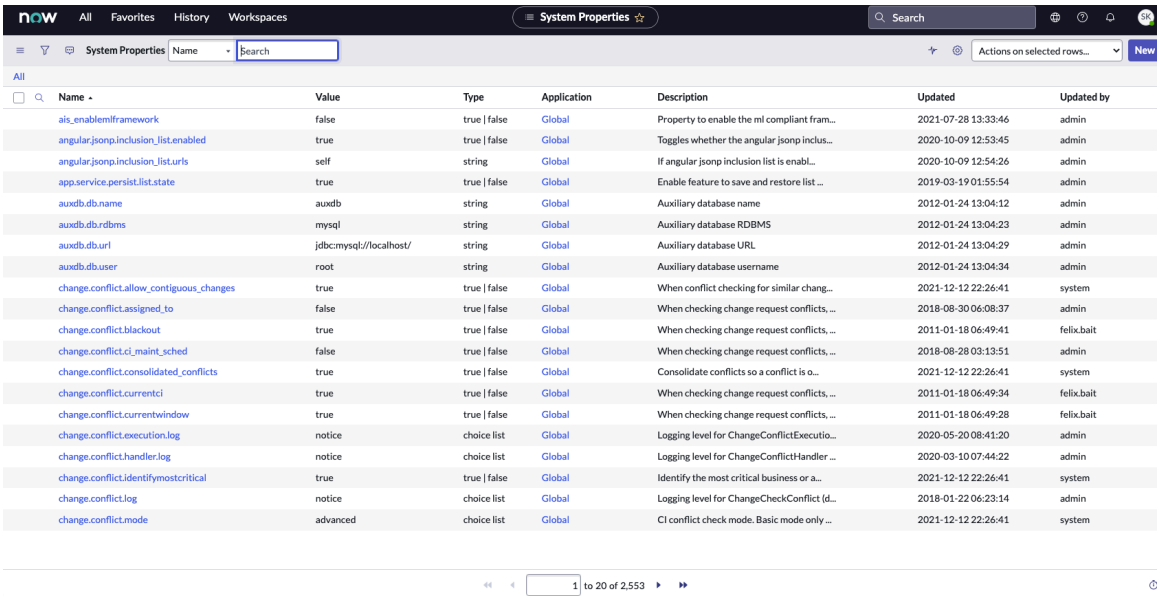


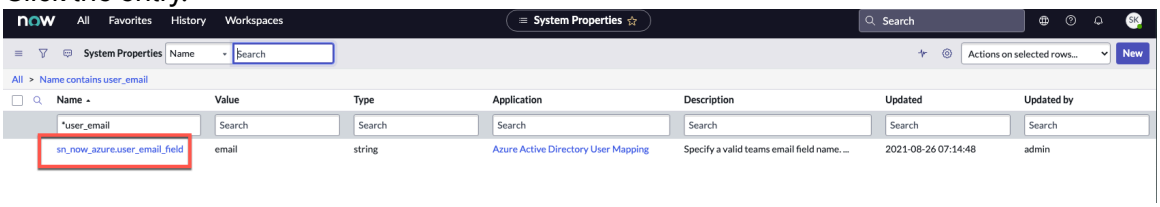
The dictionary info of the field name can be viewed.



9. Right click the **Field** and copy the value.
10. In the search field, enter `sys_properties.LIST` to view the system properties.



11. In the Name column, search for `*user_email` property.
12. Click the entry.



If the record is not editable, click **Edit** on the header to edit the record.

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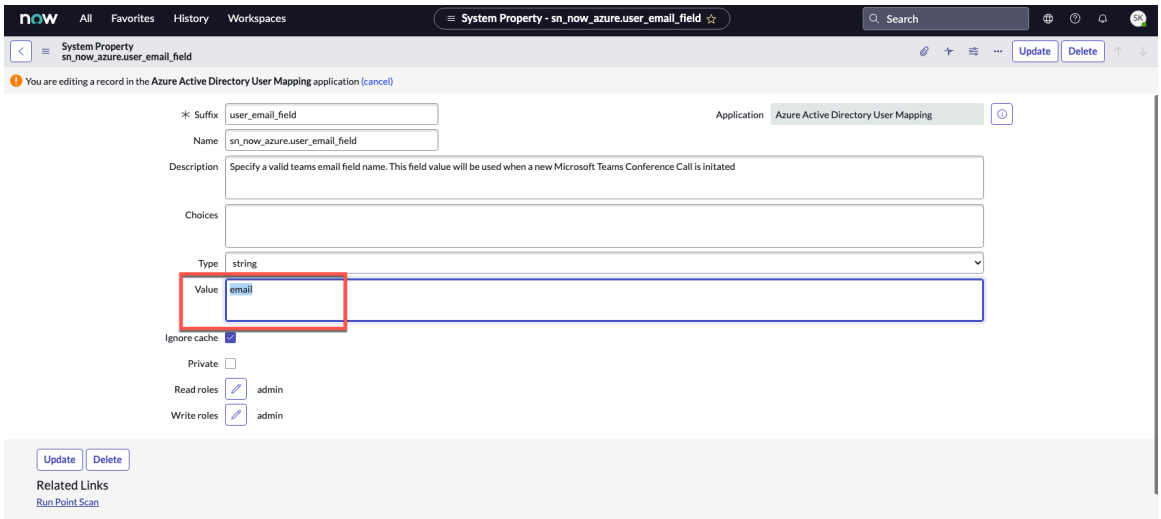
13. Update the **Value** field with the new field name that is created.

    The default value is **email**.



14. Click **Update**.

> **Note:** Ensure that the email address for all the users for the newly created field is updated with the email associated with Microsoft Teams app.

Unfurl the web links in Microsoft Teams chat

ServiceNow for Microsoft Teams supports link unfurling. Link unfurling generates a content-rich preview when a supported link is shared in a conversation with a user in Microsoft Teams.

To enable link unfurling, you must create and download the manifest file and upload the file to Microsoft Teams. To download the manifest file, refer Create and download the manifest file for pre-published apps.

In a conversation in Microsoft Teams application, the content in the URL appears as a preview to the user in the form of an adaptive card. The preview is generated based on the content shared in the URL.

The content in the adaptive card will be shown only for public knowledge articles, and the catalog items. However, the adaptive card shows generic content for all private links in the chat conversations.

Enable link unfurling

Enable link unfurling in the manifest file to preview the content of the link shared in the chat conversations.

Before you begin

Role required: admin

Procedure

1. Create and download manifest file.

   Enable the link unfurling option in the **Generic info** tab while creating the manifest file.

   For more information, see Create and download the manifest file for pre-published apps.

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2. Update the value of the ServiceNow for Teams app ID from Microsoft Teams admin center in your ServiceNow instance.
   For more information, see Update the app ID in the ServiceNow instance.

Configure the system property to open the unfurled links

Configure the property to view the content when the user clicks the adaptive card shared in the Microsoft Teams chat conversation.

Before you begin

Role required: admin

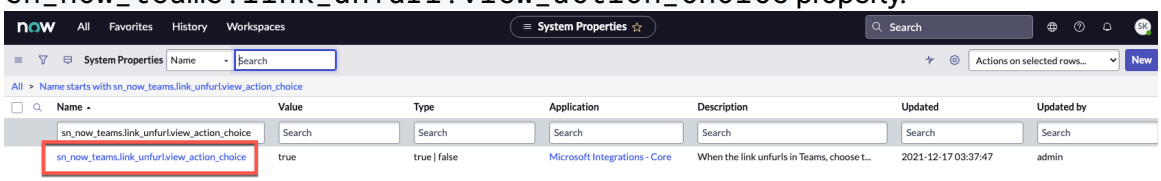
About this task

Setting the property to true opens all the configured portal-related links within the application. All the non-portal links are opened in the browser.

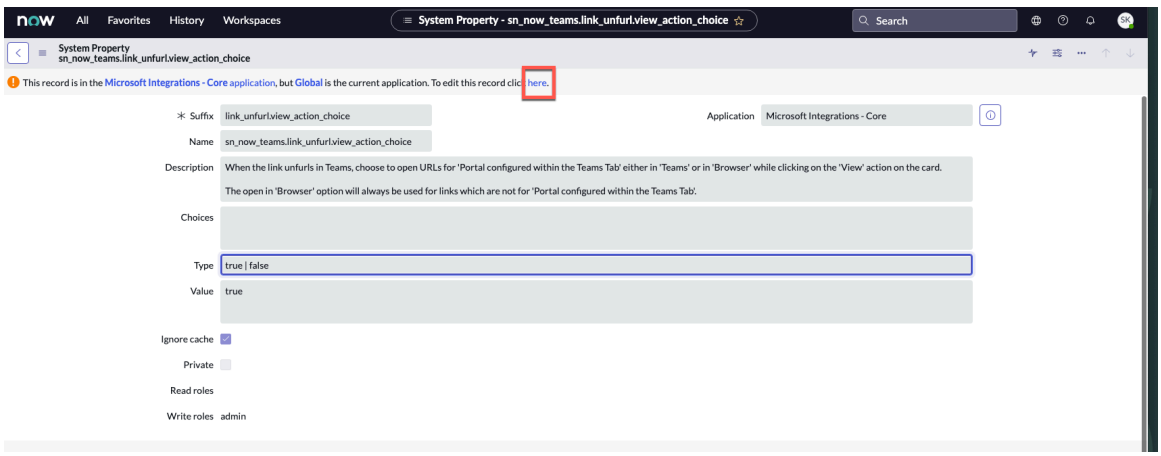
By default, this property is set as true. If you set the property as false, all the links shared in the chat conversations will be opened in the browser.

Procedure

1. In your ServiceNow instance, search for sys_properties.list.
2. In the Name column, search for `sn_now_teams.link_unfurl.view_action_choice` property.



3. Click the property.
   If the record is uneditable, click here to edit the record.



4. Update the **Value** field as `false` to view the links in a browser.

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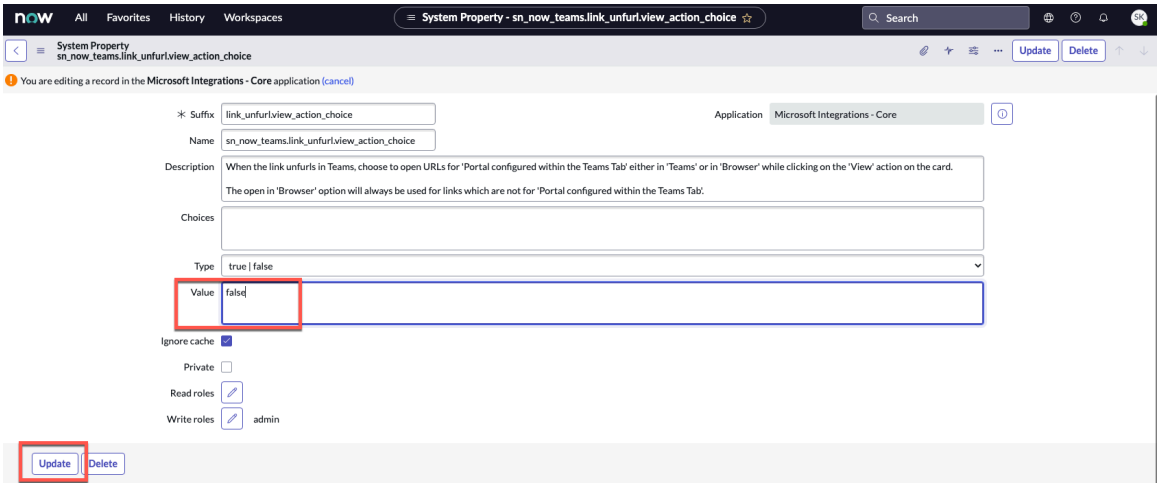

5. Click **Update**.

Configure Universal Request integration with Microsoft Teams

Complete the following procedures to configure the Universal Request integration with Microsoft Teams.

Set up Virtual Agent for Universal Request integration with Microsoft Teams

Publish the default Virtual Agent topics (conversation flows) so that they can be used in the Universal Request integration with Microsoft Teams application.

Before you begin

To use Virtual Agent capabilities, you must activate the following plugins:

- Universal Request: Virtual Agent Conversations plugin (com.snc.universal_request.va) to set up and use Virtual Agent in Universal Request. This plugin installs the Virtual Agent topics that must be made active. By default, the topics are set to inactive.
- Universal Request: NLU Model for Virtual Agent Conversations plugin (com.snc.universal_request.nlu) to set up and use the NLU model for Virtual Agent conversations.

Role required: admin

About this task

Activate the Virtual Agent topics for Universal Request.

You can also clone and modify the default topics or create your own topics to use during the chatbot conversations. For more information on creating a topic, see Create a Virtual Agent topic.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
2. In the **Category** field, enter `Universal Request`.
   The following topics and topic blocks are displayed:
   - Employee Help Request (Template)
   - Employee Help Request (Teams Template)
   - Track Universal Request Status (Template)
   - Update UR (Template)
3. Click the **Employee Help Request (Teams Template)** topic to open it.

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4. On the header section, select **Publish**.
   The topic is made available and active in the chat window.

   Note: This topic has the same functionality as the **Employee Help Request (Template)** topic, but is specially configured for Microsoft Teams.

5. Repeat this procedure to open and publish the **Track Universal Request Status (Template)** topic.

   Note: If you have already published the **Track Universal Request Status (Template)** topic for Universal Request, you can skip this step.

Configuring Microsoft Teams integration for Agent Experience

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams.

Configure Notify connector for Microsoft Teams

Configure your ServiceNow instance with Notify connector for Microsoft Teams application to enable making calls using Microsoft Teams.

After configuring, for information about using Notify connector for Microsoft Teams, see Use Notify connector for Microsoft Teams.

Make Microsoft Teams the default communication channel

Make Microsoft Teams the default communication channel to initiate a conference call to resolve a ticket.

Before you begin

Role required: notify_admin

Procedure

1. Navigate to **All** > **Notify** > **Provider Selector**.
2. Select **New**.
3. On the form, fill in the fields.

Provider selector form

Field	Description
Name	Name of the provider you are adding, for example, Microsoft Teams.
Order	Order in which this provider appears when multiple providers are configured.
Source table	The table to which Microsoft Teams must be added.
Condition	Field to add the filter conditions.
Active	Option for indicating whether Microsoft Teams as a provider is active.
Catch-all	Option for making Microsoft Teams the default provider if other notify providers like Zoom or Twilio are configured.
Manual Selection	Option for disabling the automatic selection of this provider.

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4. Select **Submit**.
   The list of service providers displays.
5. Select the created service provider.
6. Select **New** in the **Provider Selector Choices** section.

   a. Select either **Notify number group** to choose the required notify group or select **Conference provider** to choose Microsoft Teams.

      You can set up configurations for numerous conference providers within the Notify framework.

      For example, you can configure Microsoft Teams as a provider for all the conferences initiated from incidents, and Zoom as the provider for all the conferences related to change or problem.

      Note: Selecting both values results in error.

   b. Select **Submit**.

Manage Notify Connector for Microsoft Teams properties

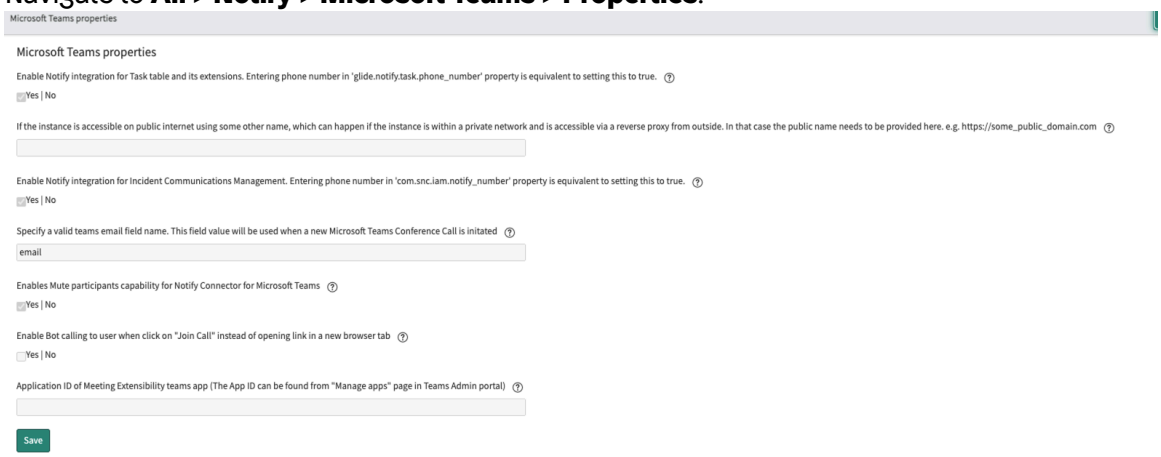
Manage the Notify connector for Microsoft Teams application properties to configure the calling capabilities.

Before you begin

Role required: Notify admin

Procedure

1. Navigate to **All** > **Notify** > **Microsoft Teams** > **Properties**.



2. On the form, fill the fields.

Notify connector for Microsoft Teams properties

Field	Description
Enable Notify integration for Task table and extensions	Option to enable Notify integration for Task table and extensions
Enable Notify integration for Incident Communications Management	Option to use Notify connector for Microsoft Teams for incident and major incident-related records.

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Field	Description
Specify a valid teams email field name	Option to provide the field name to initiate the call to the user defined in this field. **Note:** The custom field name must be defined in the sys_user table.
Enable Mute participants capability for Notify Connector for Microsoft Teams	Option to mute the participants in a conference call.
Enable Bot calling to user when click **Join Call** instead of opening link in a new browser tab	Option to enable the bot call the user in a conference call.
Application ID of Meeting Extensibility app	Option to provide the app Id of Meeting Extensibility app. Provide the Meeting Extensibility app ID details to use Meeting Extensibility in your environment.

3. Select **Save**.

Configure the conference bridge numbers to join calls via phone

Configure the conference bridge number to allow the participants to collaborate to resolve the incidents via the conference bridge number.

Note: These are additional configuration, which are optional and can be used as required.

Reserve a conference bridge number

Reserve a conference bridge number to host the conference calls to work towards the resolution of incidents via conference bridge number.

Before you begin

Role required: Microsoft Teams admin

Procedure

1. Log in to Microsoft Teams admin center.
2. Navigate to **Voice** > **Phone number**.

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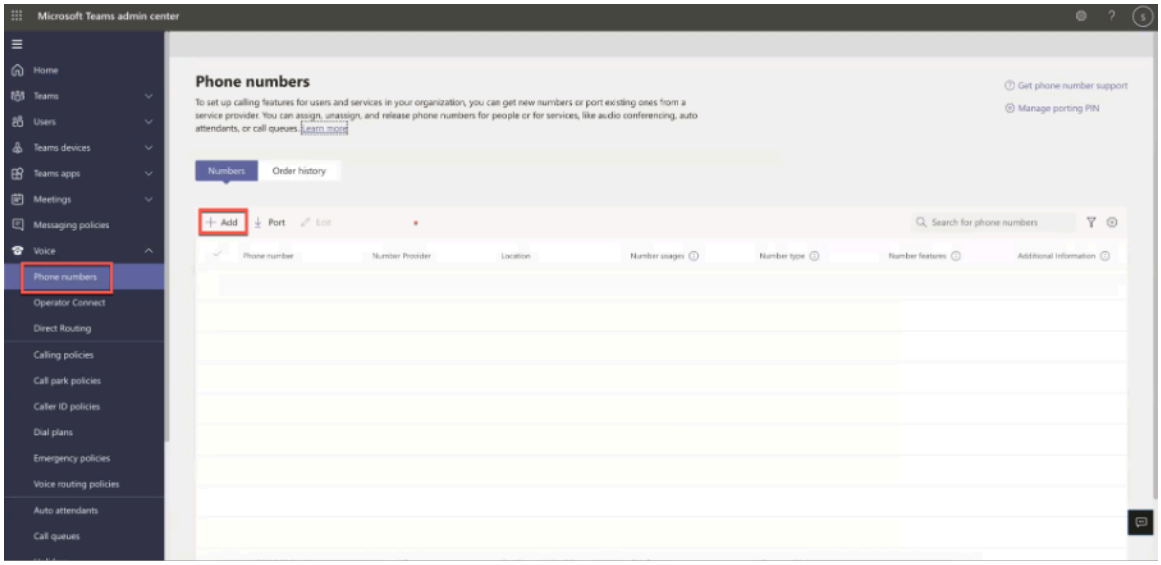
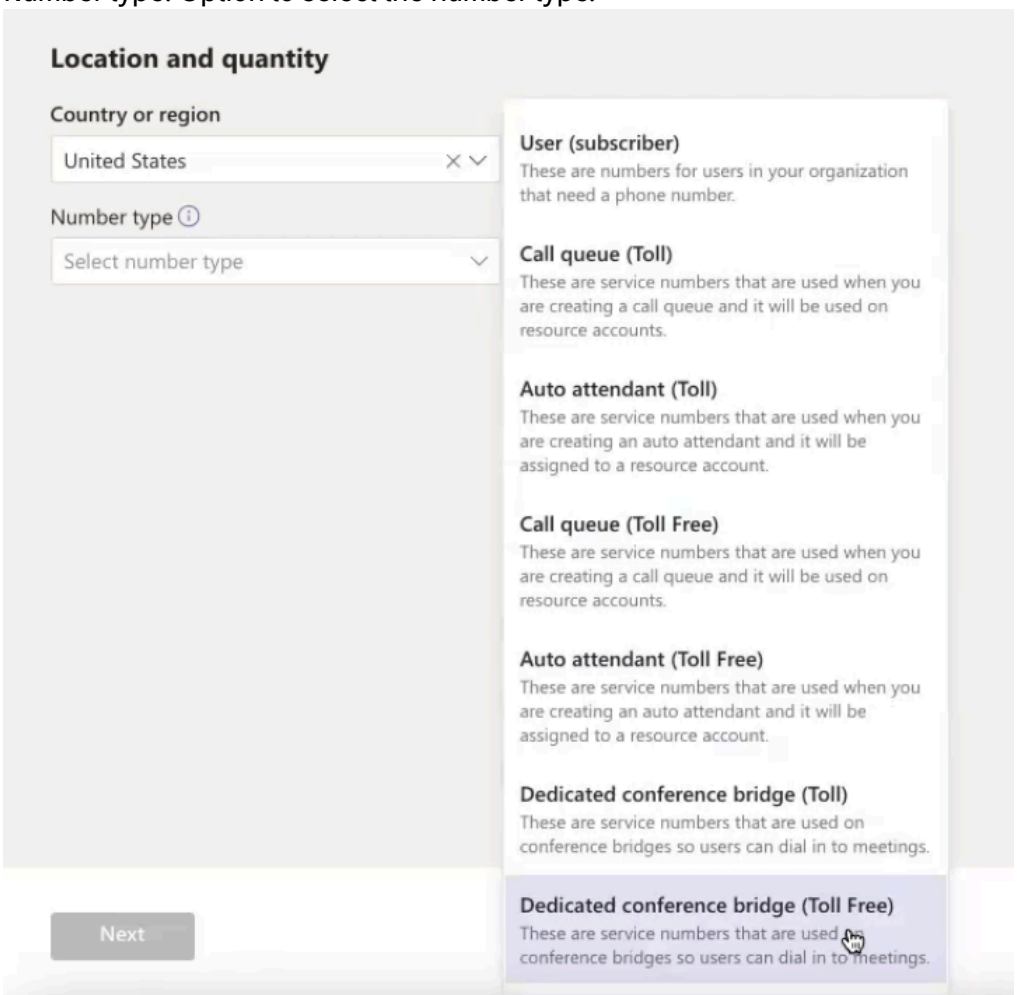


3. Click **Add**.
4. On the form, fill the fields.

   a. Add a name for your order: Provide a name for the audio service.

   b. Country or region: Option to select a country.

   c. Number type: Option to select the number type.



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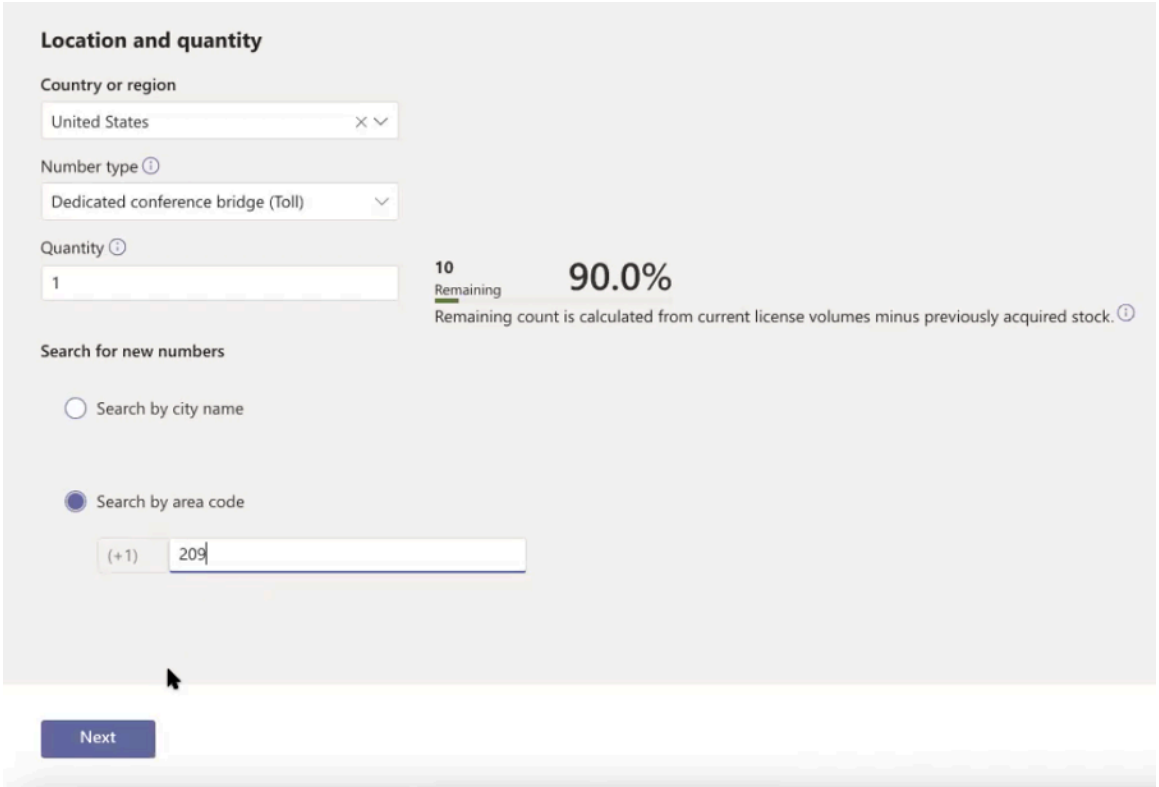
d. Quantity: Option to choose the number of the conference number.

e. Search for new numbers: Option to choose the conference numbers based on city name or by area code.



f. Click **Next**.

The reserved number is displayed.

g. Click **Place order**.

Upon placing the order, the conference numbers appear in the phone numbers for the tenant.

h. Click **Finish**.

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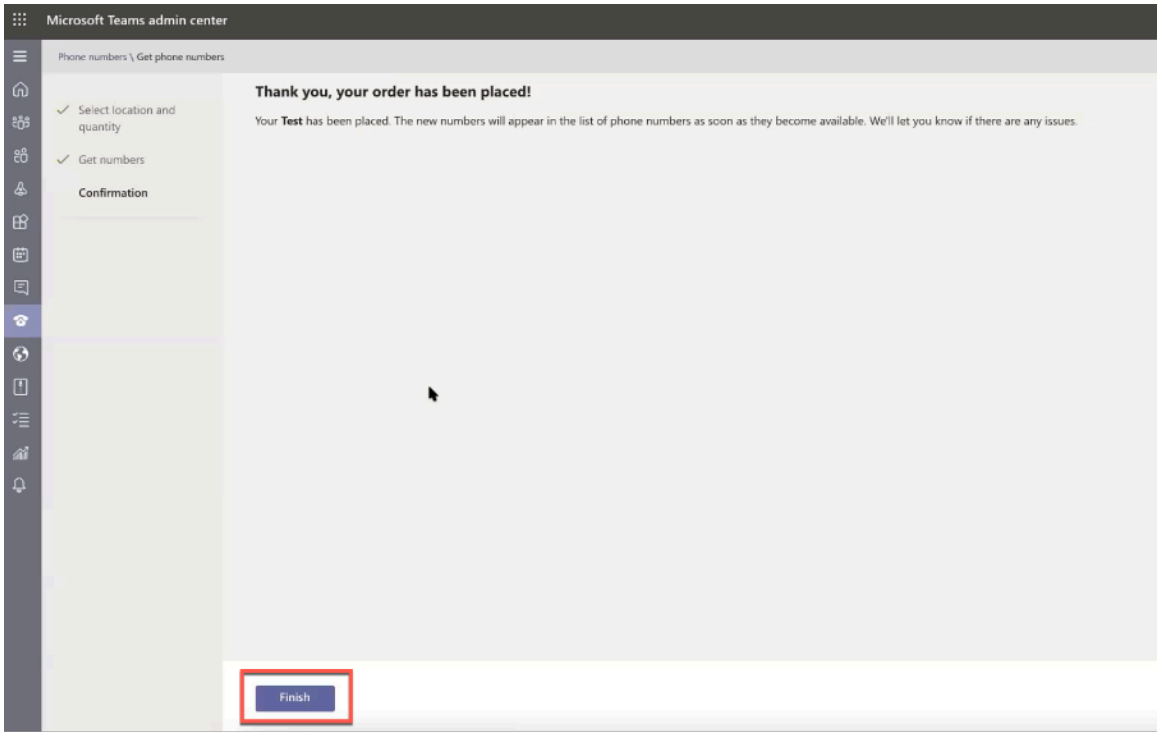
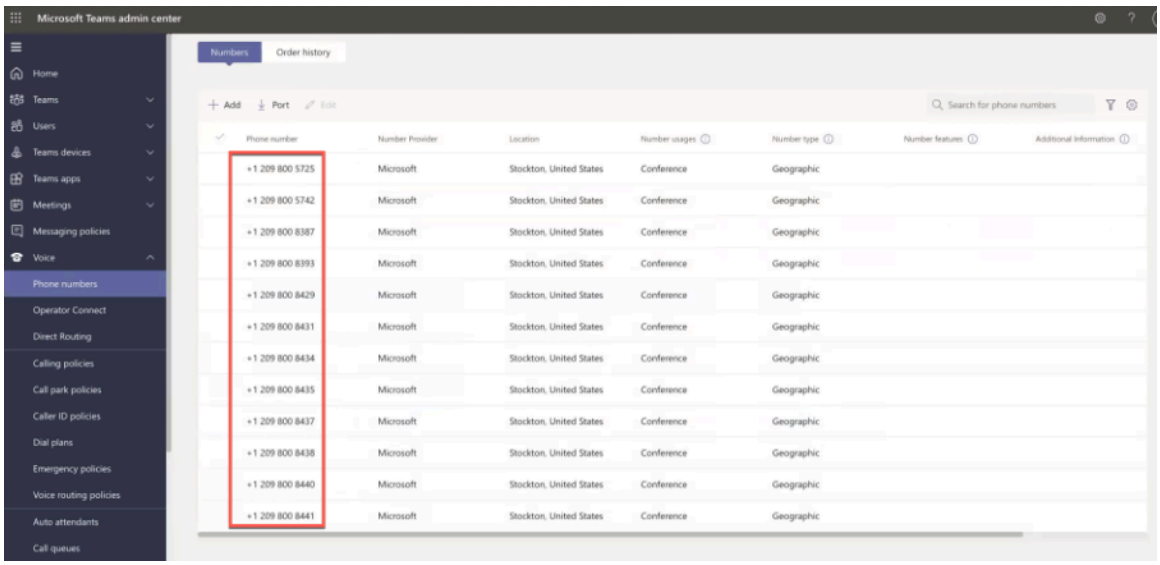


The reserved numbers appear under Phone numbers section as depicted.



Configure conference bridge number for meetings

Configure the conference bridge number to be used for collaborating with the participants to resolve the major incidents.

Before you begin

Role required: Microsoft Teams admin

Procedure

1. Log in to Microsoft Teams admin center.
2. Navigate to **Meetings** > **Conference bridges**.
3. Click **Add**, and then select the conference bridge type.

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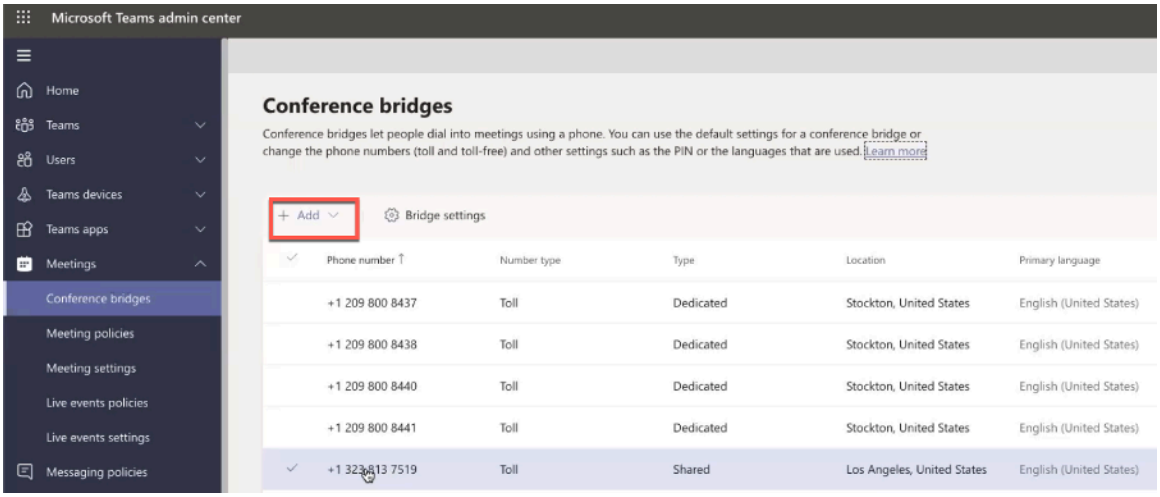
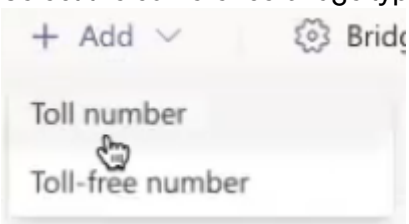


4. Select the conference bridge type.



5. Select the number from the drop-down option.

   This is the number that is reserved for your tenant for conference calls.

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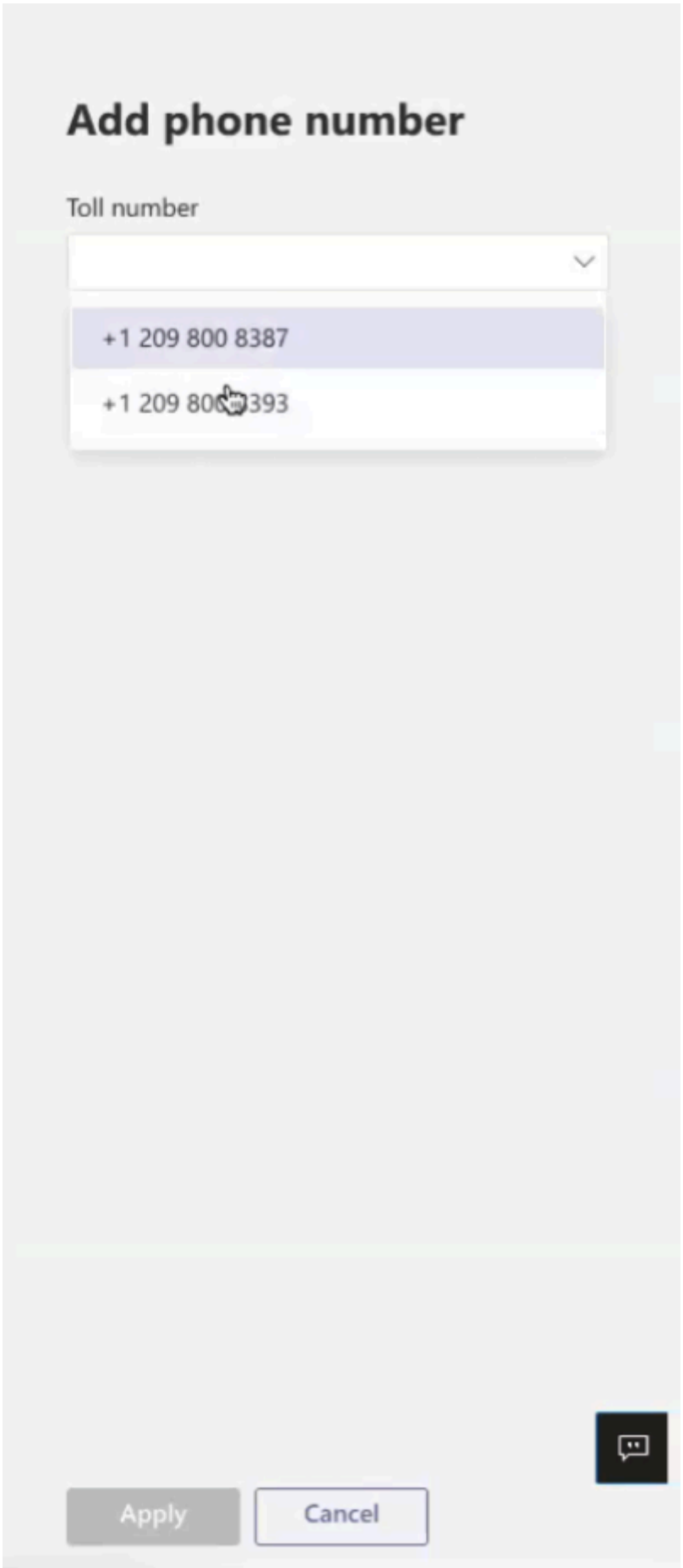

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6. Click **Apply**.

   The selected number is added to the list of conference bridge numbers.

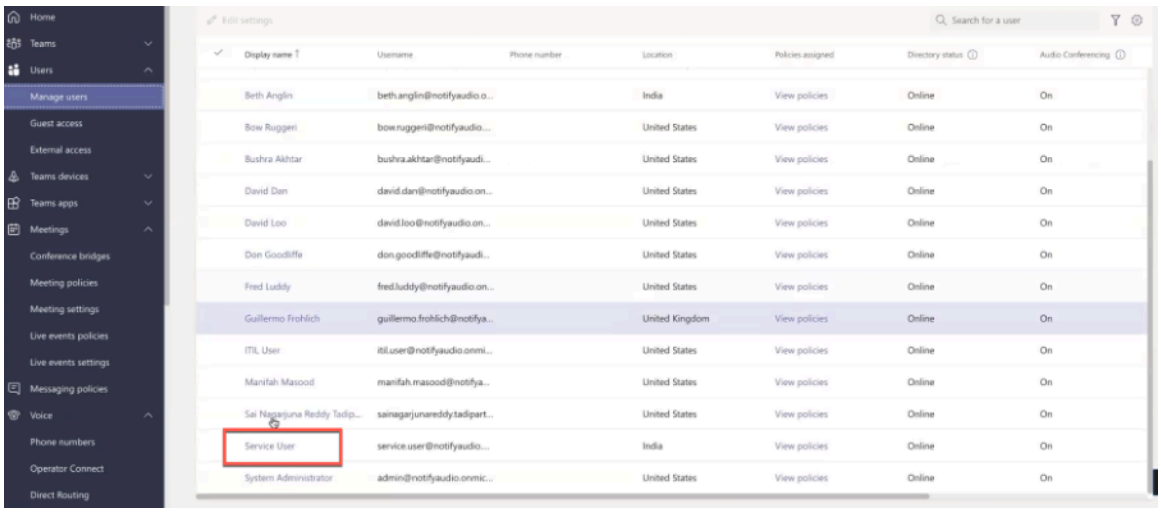
Setup the conference bridge for the users

Make the conference bridge number available for the participants to join a conference call via the bridge number.

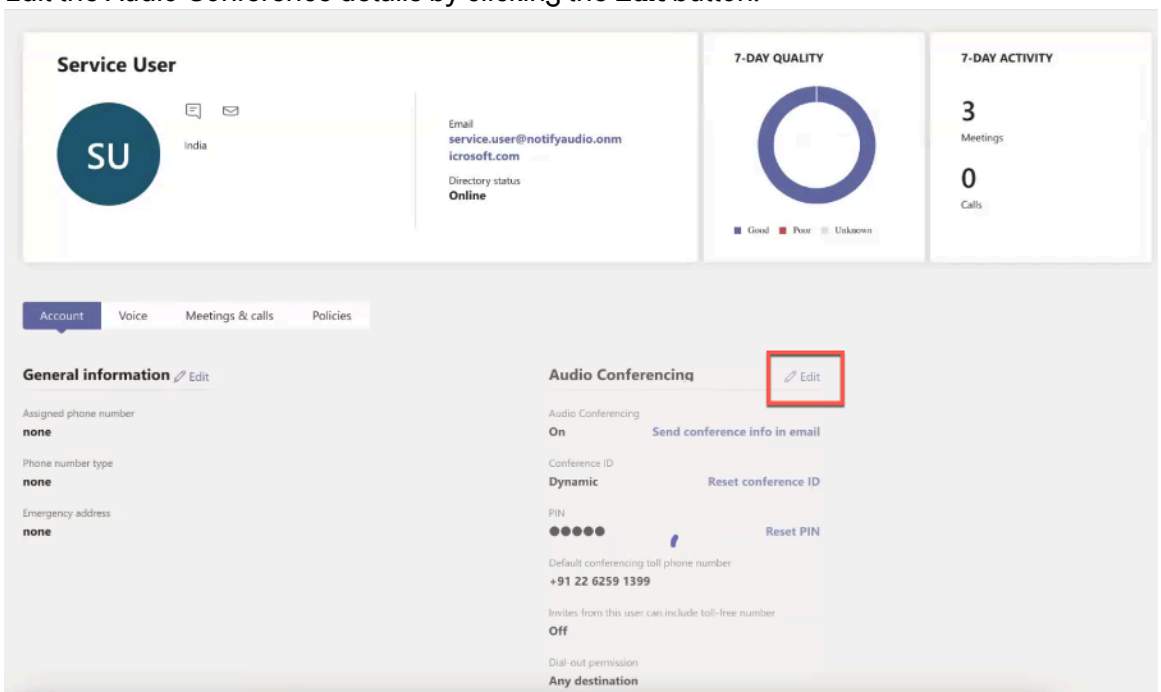
Before you begin
Role required: admin

Procedure

1. Log in to Microsoft Teams admin center.
2. Navigate to **Users** > **Manage users**.
3. Click **Service User**.



4. Edit the Audio Conference details by clicking the **Edit** button.



5. Select the toll number.

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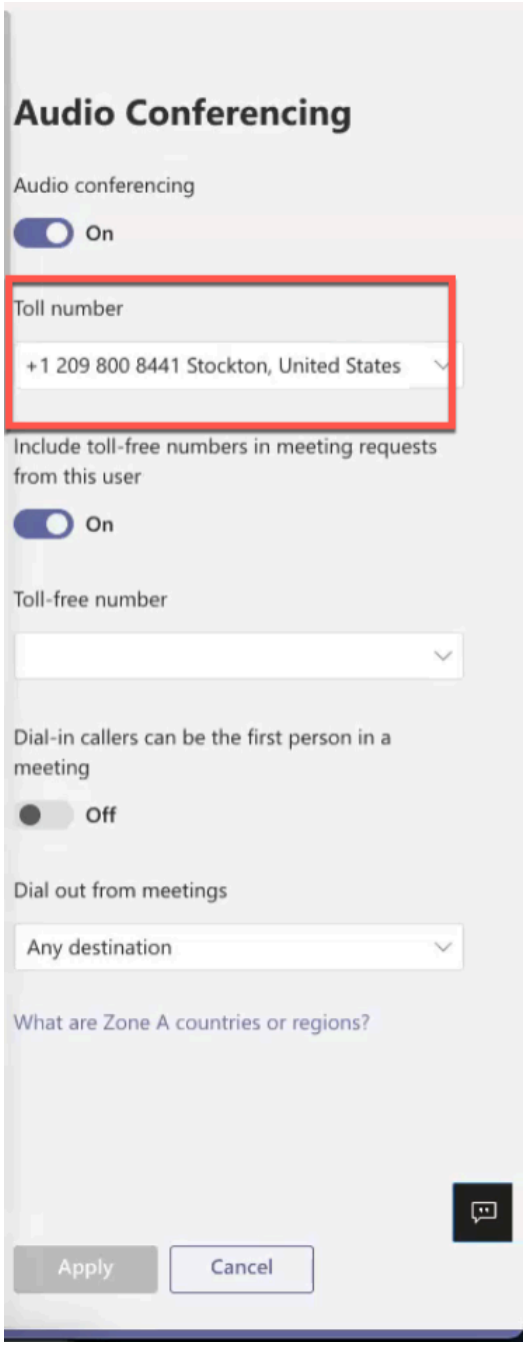

6. Click **Apply**.

Enable Audio Conferencing

Enable the audio conferencing to allow the users to participate in the conference call by dialing the conference bridge number.

Before you begin

Note: This is an additional configuration, which is optional and can be used as required.

Role required: sn_notify_msteams.admin

Procedure

1. In your ServiceNow instance, navigate to **All** > **Notify** > **Microsoft Teams** > **Configuration**.
2. Select **Enable Audio Conferencing**.

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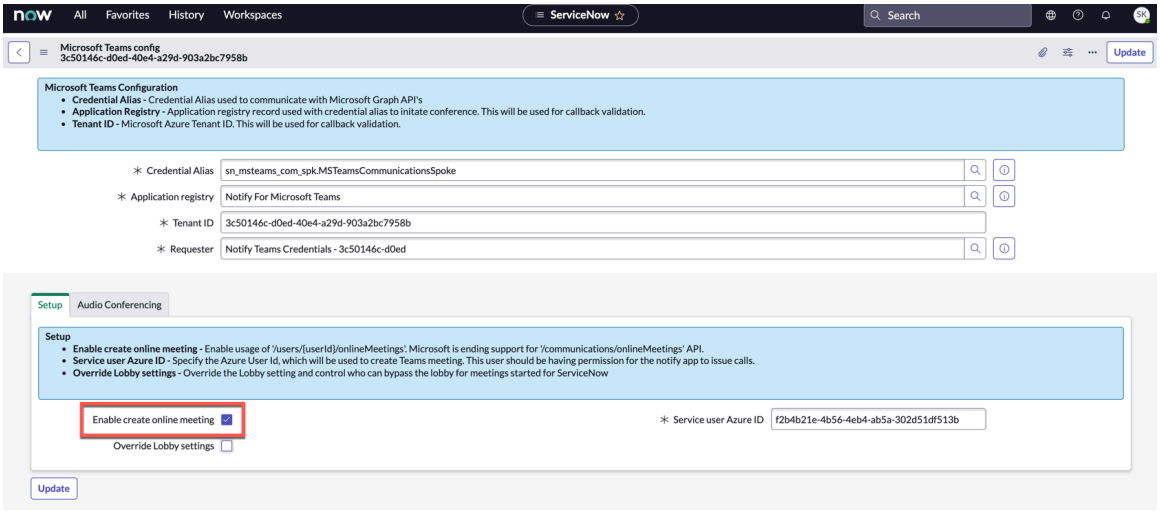


3. Select **Save**.

Configure Lobby Settings

You can override the lobby settings in your instance to allow the participants to join the conference call without waiting in the lobby.

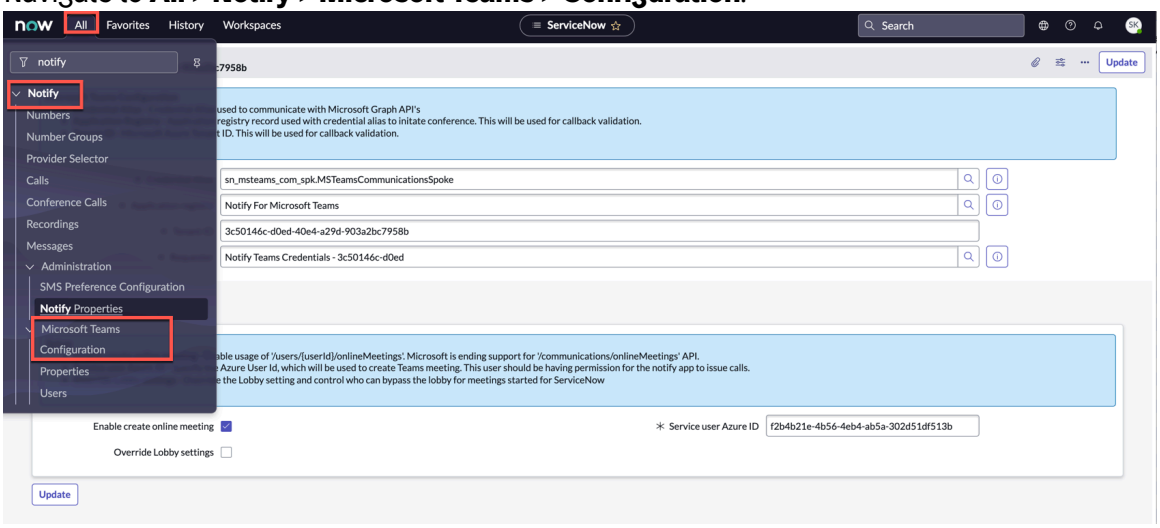
Before you begin

Note: This is an additional configuration, which is optional and can be used as required.

Role required: sn_notify_msteams.admin

Procedure

1. Navigate to **All** > **Notify** > **Microsoft Teams** > **Configuration**.



Note: In the **Setup** tab, ensure that **Enable create online meeting** option is selected.

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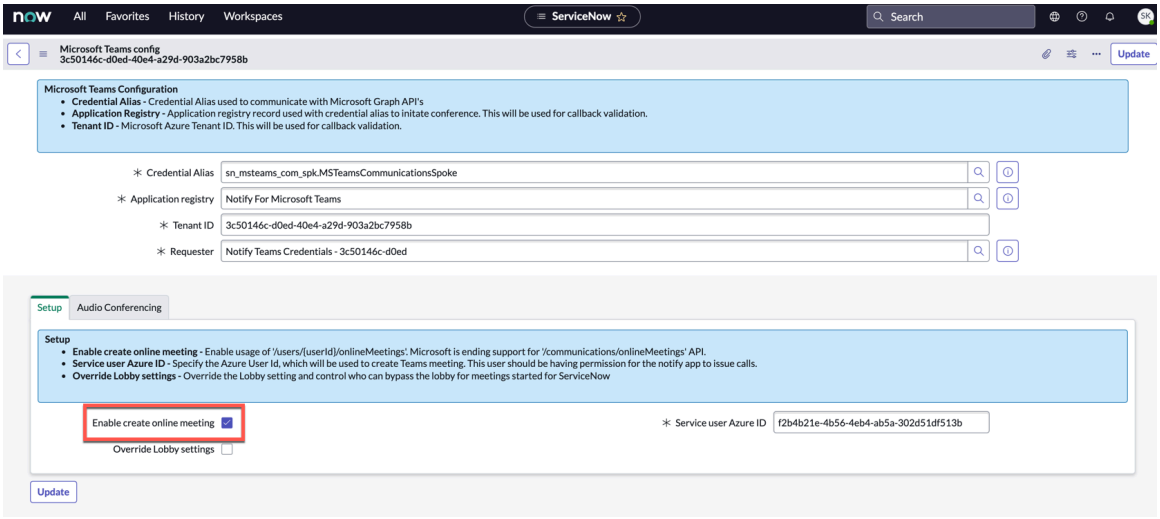
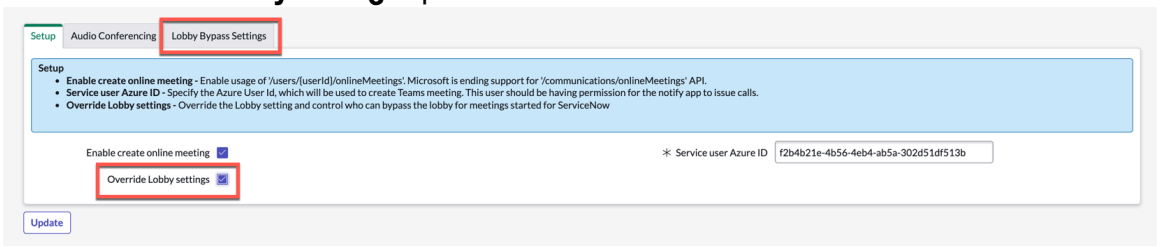


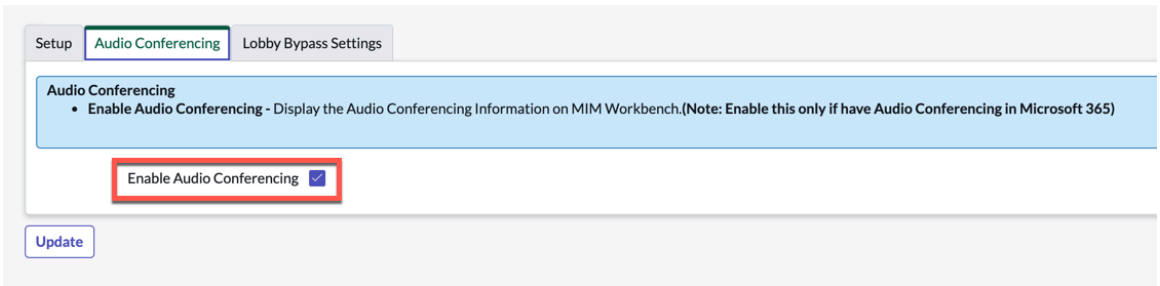
2. Select **Override Lobby settings** option.



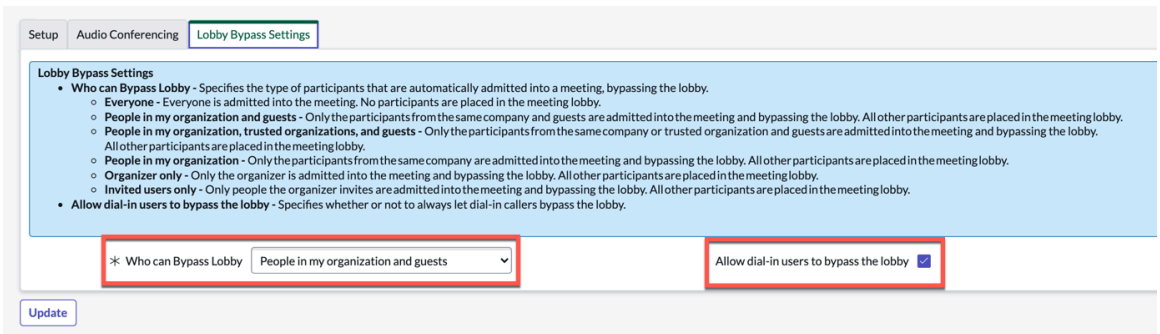
The **Lobby Bypass Settings** tab appears once you select the **Override Lobby settings** option.

3. Select **Audio Conferencing** tab, and then select **Enable Audio Conferencing**option.

Note: If you have an Microsoft Azure audio conferencing subscription, you must enable this option to enable the users to join the conference call via phone numbers.



4. Select **Lobby Bypass Settings** tab.



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a. **Who can Bypass Lobby**: Select the participants who can automatically join the conference call.

b. **Allow dial-in users to bypass the lobby**: This option appears only if **Enable Audio Conferencing** option is selected in **Audio Conferencing** tab. Select this option to allow the participants to automatically join the conference call if they have joined using the conference bridge number.

5. Select **Update**.

Map Microsoft Azure email to ServiceNow instance

Create a custom email field to use Microsoft Teams app to initiate call for the agents to resolve the tickets raised by users.

Before you begin

Role required: admin

About this task

If your email field on the sys_user table in your ServiceNow® instance does not match email on the Microsoft Azure tenant for the user, then mapping is required. The default mapping is to the email field and stored in the system property field sn_now_azure.user_email_field. Use this procedure to change the email field value as needed.

Procedure

1. Copy the user_email_field value.

a. Open your ServiceNow instance.

b. Navigate to **All** > **System Security** > **Users and Groups** > **Users**.

c. Select a user.

d. Right-click on the form header and select **Configure** > **Form Layout**.

e. In the Create new field section, fill in the fields.

Create new field

Field	Description
Name	Enter the name of the field as you want it to appear on forms and lists. Example: User Principal Name.
Type	Select a field type as **String**.
Field length	Select a field length. This field is visible only for certain field types.

f. Select **Add**.

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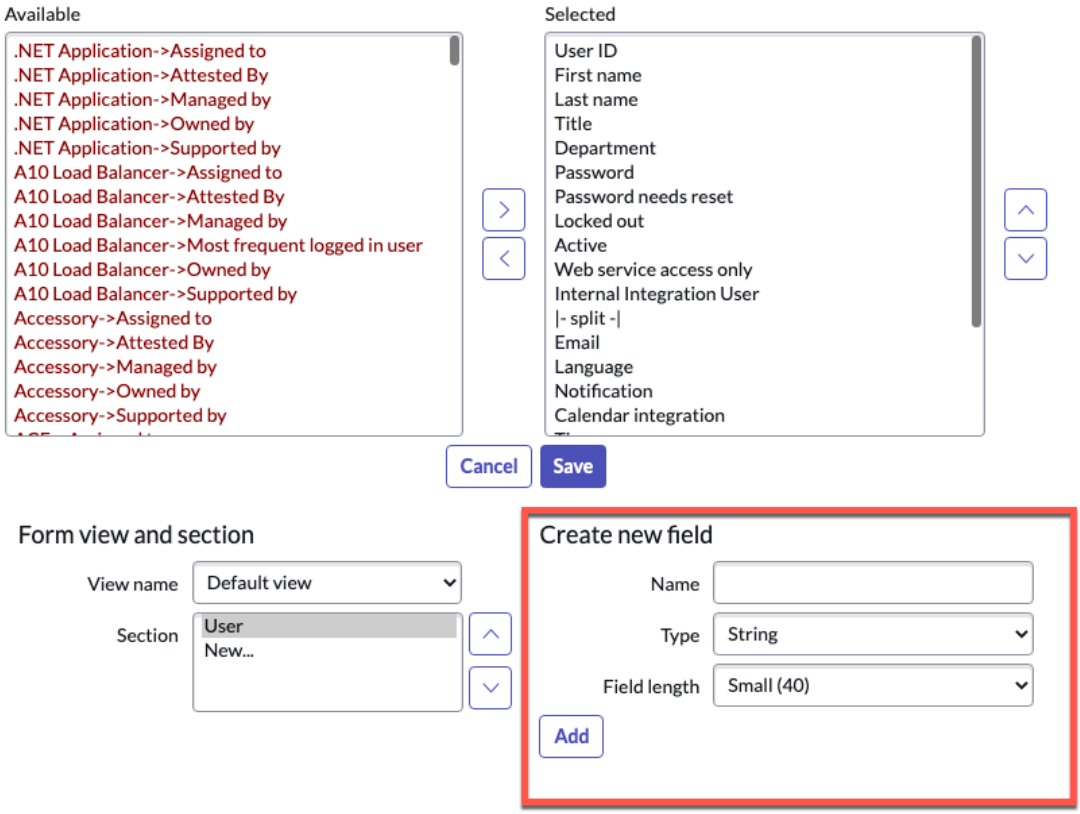
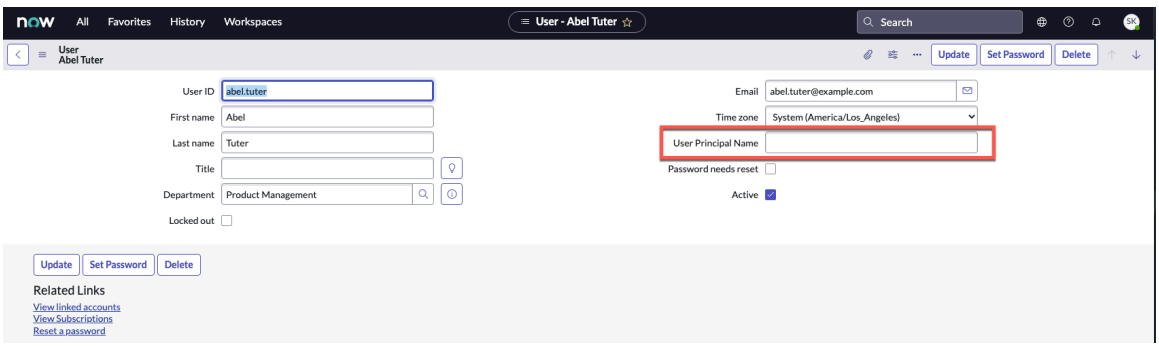


g. In the Selected slush bucket column, move the field in the desired location on the form.

h. Select **Save**.

The field now appears on the form in the designated location.



The admin must enter the email used for Microsoft Teams in this field.

You need to configure the newly created field value as the default field for initiating chats with the employee in Microsoft Teams.

i. Right-click on the field and select **Show <value of the field name>**.

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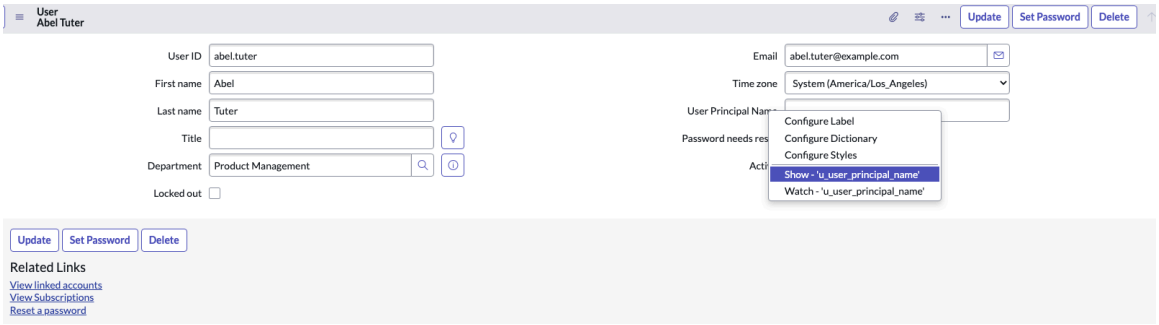
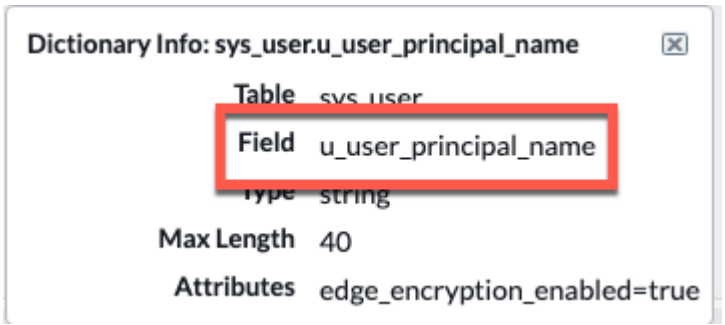


The dictionary info of the field name can be viewed.



j. Right-click on the **Field** and copy the value.

2. Change the email field value.

a. Navigate to **Notify** > **Microsoft Teams** > **Properties**.

b. Paste the copied email field value in the field **Specify a valid teams email field value. This field value will be used when a new Microsoft Teams Conference Call is initiated** of the Microsoft Teams Properties form.

The default value is `email`.

c. Select **Save**.

Note: Ensure that the email address for all the users for the newly created field is updated with the email associated with Microsoft Teams app.

Managing ServiceNow for Microsoft Teams and Microsoft 365

Customize and manage different ServiceNow® for Microsoft Teams or Microsoft 365 integrations both for Employee Experience and Agent Experience, as required.

Important:

- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

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Manage Microsoft Teams integration for Employee Experience

It offers help for employees to resolve their IT, HR, and UR related issues through Microsoft Teams. Employees can interact with the agents from within Microsoft Teams to resolve their issues.

Customize IT Service Management integration with ServiceNow

Customize the features in your instance to meet your organization needs.

You can customize:

- UI actions
- Business rules

Customize UI actions for IT Service Management with Microsoft Teams

Enables you to extend the UI actions to the tables you require.

You can extend the following UI actions to any other tables:

- Start Microsoft Teams chat
- Import Messages from Microsoft Teams

Customize Start Microsoft Teams chat UI action

Enables you to extend the Start Microsoft Teams chat UI actions to the tables you require.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **UI Actions**.
2. Open the existing **Start Microsoft Teams chat** UI action in a new window.
3. Click **New**.
4. On the **UI action** form, fill the fields:

UI action form

Field	Description
Name	Name of the UI action. Ex: Start Microsoft Teams chat
Table	Table to which the Start Microsoft Teams chat UI action is to be available
Form button	Check this box
Show insert	Clear this box
Client	Check this box
List v3 Compatible	Check this box
Onclick	Type `initChatWithGroup()`
Condition	Copy and paste the condition of the existing Start Microsoft Teams chat. Modify the column name as required.
Script	Copy and paste the script of the existing Start Microsoft Teams chat. Modify the column name as required.

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Field	Description
Workspace Form Button	Check this box. Copy and paste the **Workspace Client Script**of the existing Start Microsoft Teams chat. Modify the column name as required.

5. Click **Submit**.

Customize Import Messages from Microsoft Teams UI action

Enables you to extend the **Import Messages from Microsoft Teams** UI action to the tables you require.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **UI Actions**.
2. Open the existing **Import Messages from Microsoft Teams** UI action in a new window.
3. On the **UI Actions** screen, Click **New**.
4. On the **UI Action** form, fill the fields.

UI action form

Field	Description
Name	Name of the UI action. Ex: Import Messages from Microsoft Teams
Table	Table to which the Import Messages from Microsoft Teams UI action is to be available
Form button	Check this option
Show insert	Clear this option
Client	Check this option
Condition	Copy and paste the condition of the existing Import Messages from Microsoft Teams. Modify the column name as required.
Script	Copy and paste the script of the existing Import Messages from Microsoft Teams. Modify the column name as required.
Workspace Form Button	Check this box. Copy and paste the **Workspace Client Script**of the existing Import Messages from Microsoft Teams. Modify the column name as required.

5. Click **Submit**.

Customize business rules for actionable notifications

Enables you to customize the business rules for actionable notifications.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Notifications** > **Actionable Notifications - Business Rules**.
2. Open a business rule you would like to extend to another table.
   Example: Send comment to caller.
3. Click **New**.
4. On the **UI Action** form, fill the fields.

UI action for business rule form

Field	Description
Name	Name of the business rule
Table	Table to which the Send comment to caller is to be assigned.
Active	Check this box
Advanced	Check this box
Where to run	○ When: after ○ Insert: Check this box ○ Update: Check this box ○ Filter Conditions: Apply the filter condition of the Send comment to caller business rule
Advanced	○ Condition: Copy and paste the value of the condition from the existing Send comment to caller business rule. Modify the values as required. ○ Script: Copy and paste the script from the existing Send comment to caller business rule. Modify the values as required.

5. Click **Submit**.

Configure business rule for reassigning tickets

Configure the business rule for reassigning the tickets.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Click **New**.
3. On the form, fill in the fields.

   In the **Advanced** tab, update the **Script** fields.

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Business rule for re assigning ticket

Field	Description
Name	Name of the business rule
Table	Table to which the ticket should be re-assigned.
Active	Check this box
Advanced	Check this box
Where to run	○ When: **async** ○ Update: Check this box ○ Filter Conditions: Apply the filter condition of the reassigning the ticket business rule. Select the fields to which the ticket should be re-assigned. Ex: Assigned to field.

Advanced	Script: Copy and paste the script. Modify the values as required.
	
	Update the field name in the `assigned_to` if you are using a different value.
	
	`var importChatUtils = new sn_tcm_collab_hook.MSTeamsImportChatUtils();`
	`var chatUtil = new sn_tcm_collab_hook.MSTeamsChatUtil();`
	
	`var azureIds = chatUtil.getAzureIds([current.getValue('assigned_to')]); //Update the assigned_to field if required`
	`var credentialAlias = chatUtil.getTeamsChatCredentialsAliasGr();`
	`var chats = importChatUtils.getChatsofADocument(current.sys_id);`
	`var azureId = '';`
	
	`if (azureIds && azureIds.azureUserIds && azureIds.azureUserIds.length > 0) azureId = azureIds.azureUserIds[0];`
	
	`if(gs.nil(azureId)){ gs.addErrorMessage(gs.getMessage('Invalid Azure Id, cannot add user to Chat')); return; }`
	
	`chats.forEach( function(chat) {`

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Field	Description

	``
	importChatUtils.addMemberToChat(chat,azureId,credentialAlias,
	current.getValue('assigned_to')); //Update the assigned_to field if required
	});
	``

4. Click **Submit**.

Configure business rule for close condition

Configure the business rule for close condition to auto-import the chats.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Click **New**.
3. On the form, fill in the fields.

   In the Advanced tab, update the **Condition** and the **Script** fields.

Business rule for close condition

Field	Description
Name	Name of the business rule
Table	Table to which the close condition is to be assigned.
Active	Check this box
Advanced	Check this box
Where to run	○ When: **async** ○ Update: Check this box ○ Filter Conditions: Apply the filter condition of the close condition business rule
Advanced	○ Condition: Copy and paste the value of the condition. Modify the values as required. ``` !current.avoid_closing_chat_records && new sn_tcm_collab_hook.MSTeamsImportChatUtils().hasMatchingCloseCondition(current) ```

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Field	Description
	○ Script: Copy and paste the value for the script. Modify the values as required. `new sn_tcm_collab_hook.MSTeamsImportChatUtils().closeChatStorageRecords(current);`

4. Click **Submit**.

Customize HR Service Delivery integration with Microsoft Teams

Customize the features in your instance to meet your organization needs.

You can customize:

- UI actions
- Business rules

Customize UI actions for HR Service Delivery integration with Microsoft Teams

Enables you to extend the UI actions to the tables you require.

You can extend the following UI actions to any other tables:

- Start Microsoft Teams chat
- Import Messages from Microsoft Teams

Customize Start Microsoft Teams chat UI action

Enables you to extend the Start Microsoft Teams chat UI actions to the tables you require.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **UI Actions**.
2. Open the existing **Start Microsoft Teams chat** UI action in a new window.
3. On the **UI Actions** screen, Click **New**.
4. On the UI Action form, fill the fields:

UI Actions

Field	Description
Name	Name of the UI action. Ex: Start Microsoft Teams chat
Table	Table to which the Start Microsoft Teams chat UI action is to be available
Application	HR Service Delivery integration with Microsoft Teams
Form button	Check this box
Show insert	Clear this box
Client	Check this box

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Field	Description
Condition	Copy and paste the condition of the existing Start Microsoft Teams chat. Modify the column name as required.
Script	Copy and paste the script of the existing Start Microsoft Teams chat. Modify the column name as required.
Workspace Form Button	Check this box. Copy and paste the **Workspace Client Script**of the existing Start Microsoft Teams chat. Modify the column name as required.

5. Click **Submit**.

Customize Import Messages from Microsoft Teams UI action

Enables you to extend the **Import Messages from Microsoft Teams** UI action to the tables you require.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **UI Actions**.
2. Open the existing **Import Messages from Microsoft Teams** UI action in a new window.
3. On the **UI Actions** screen, click **New**.
4. On the **UI Action** form, fill the fields.

UI Action

Field	Description
Name	Name of the UI action. Ex: Import Messages from Microsoft Teams
Table	Table to which the Import Messages from Microsoft Teams UI action is to be available
Application	HR Service Delivery integration with Microsoft Teams
Form button	Check this option
Show insert	Clear this option
Client	Check this option
Condition	Copy and paste the condition of the existing Import Messages from Microsoft Teams. Modify the column name as required.
Script	Copy and paste the script of the existing Import Messages from Microsoft Teams. Modify the column name as required.
Workspace Form Button	Check this option.

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Field	Description
	Copy and paste the **Workspace Client Script**of the existing Import Messages from Microsoft Teams. Modify the column name as required.

5. Click **Submit**.

Customize business rules for actionable notifications

Enables you to customize the business rules for actionable notifications.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow for Microsoft 365** > **Notifications** > **Actionable Notifications - Business Rules**.
2. Open a business rule you would like to extend to another table.
   Example: Send comment to caller.
3. On the **UI Actions** screen, Click **New**.
4. On the **UI Action** form, fill the fields.

UI Action for business rule

Field	Description
Name	Name of the business rule
Table	Table to which the Send comment to caller is to be assigned.
Application	HR Service Delivery integration with Microsoft Teams
Active	Check this option
Advanced	Check this option
Where to run	○ When: after ○ Insert: Check this option ○ Update: Check this option ○ Filter Conditions: Apply the filter condition of the Send comment to caller business rule
Advanced	○ Condition: Copy and paste the value of the condition from the existing Send comment to caller business rule. Modify the values as required. ○ Script: Copy and paste the script from the existing Send comment to caller business rule. Modify the values as required.

5. Click **Submit**.

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Customize UI actions for Universal Request integration with Microsoft Teams

Customize the UI actions and extend them to the tables that you require. The `UniversalRequestMSTeamsUtils` script include controls the visibility of the UI actions.

The following UI actions are available by default. You can customise them to suit your needs.

- Start Microsoft Teams Chat
- Import Messages from Microsoft Teams

To customise the UI actions, you must modify the form fields. For a detailed understanding of the form fields, see UI actions

Using ServiceNow for Microsoft Teams and Microsoft 365

Employees and agents can work together to resolve their issues for IT Service Management, HR Service Delivery, and Universal Request from within Microsoft Teams.

Important:

- Actions that require the *admin* role, can also be performed with the *sn_now_teams.admin* role.
- From IT Service Management for Microsoft 365 (version 2.6.7), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.
- From HR Service Delivery for Microsoft 365 (version 3.3.6), ServiceNow for Microsoft Teams is upgraded to ServiceNow for Microsoft 365.

For upgrading existing Microsoft Teams capabilities to Microsoft 365 applications, see Integrating ServiceNow with Microsoft 365 applications for Employee Experience.

Use Microsoft Teams integration for Employee Experience

It offers help for employees to resolve their IT, HR, and UR related issues through Microsoft Teams. Employees can interact with the agents from within Microsoft Teams to resolve their issues.

Use ITSM and HRSD integrations with Microsoft Teams

Employees and agents can collaborate to receive service and resolve issues effectively from Microsoft Teams.

Employee actions

Respond to the approval notifications and the comments against the service-related tickets.

Actionable notifications sent through Virtual Agent in Microsoft Teams. You can:

- Accept or reject approvals in response to an actionable notification
- Respond to a comment from an agent in an actionable notification

Link ServiceNow user account to Microsoft Teams application for Virtual Agent

Link your ServiceNow account to an Microsoft Teams application to access the non-public Virtual Agent topics that use ServiceNow records.

Before you begin

Role required: user

The authentication step occurs in your instance or in a Service Portal set by your admin.

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Procedure

1. Open the Microsoft Teams application.
2. Find your Virtual Agent bot.
3. Start a conversation with your Virtual Agent bot.
   The bot then presents a prompt that provides options to authenticate **Link to ServiceNow**, continue as a guest user, or see the help menu **Check out Tips**.
4. Select **Link to ServiceNow** to authenticate.
   Authentication directs you to your instance or a Service Portal set by your admin. If you aren't already logged in to your instance or a Service Portal, you're prompted to enter your login credentials.

   Note:

   The administrator can auto-link the ServiceNow user accounts to Microsoft Teams. For more information, see Account linking in pre-built messaging integrations.
5. On the confirmation dialog, select *Confirm* to link your account.

Unlink your ServiceNow user account from Microsoft Teams for Virtual Agent

Unlinking your account from Microsoft Teams to deactivate the association between your ServiceNow account and the Microsoft Teams application.

Before you begin

Role required: user
After you unlink your account, you can no longer engage in Virtual Agent conversations that query or change records in the ServiceNow database.

Procedure

1. From the application navigator, navigate to **Self-Service** > **My Profile**.
2. Click the **View Linked Accounts** related link.
3. In the linked accounts page, select the check box for the messaging integration to be unlinked.
4. Select **Actions on selected rows** and then click **Unlink account**.

   The link between your ServiceNow account and the Virtual Agent messaging integration becomes inactive.

   Note: Even though you unlinked your account, you can still run public Virtual Agent conversations. To link your account again, repeat steps 1 through 3 for the associated messaging integration and in the **Actions on selected rows...** click **Link account**.

View informational notifications

View the notifications that are sent during specific events in a ticket life cycle. These notifications are sent to the requester associated with the ticket.

Before you begin

Role required: user

About this task

The following informational notifications are included with ServiceNow for Microsoft Teams application:

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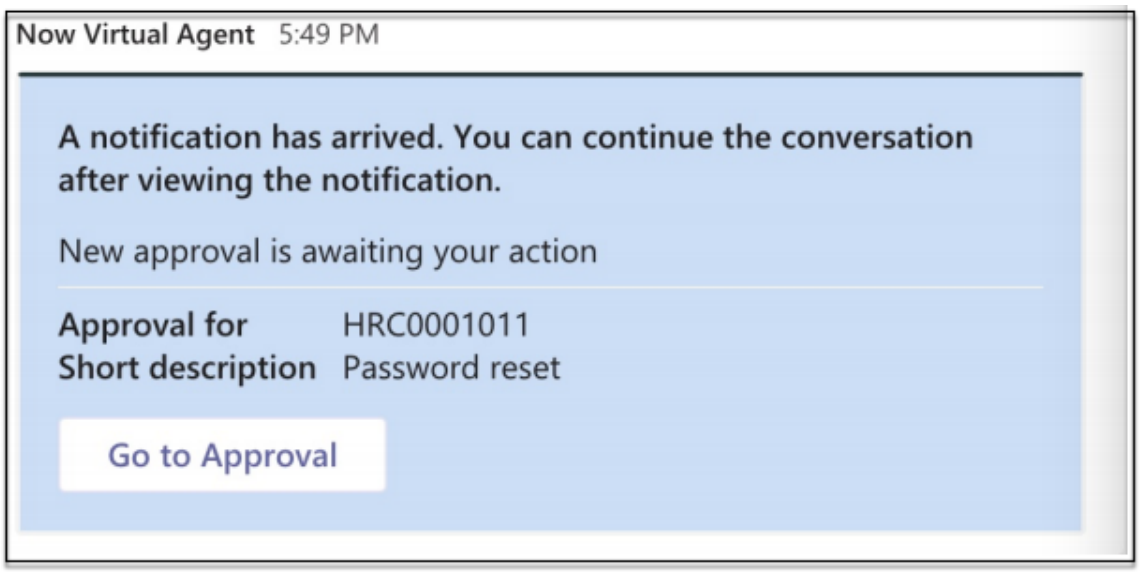
- Incident resolved
- Incident state update
- Requested item complete
- Requested item approved
- Request item rejected
- Request item update

Procedure

1. Launch Microsoft Teams application.
2. Click **Activity**.
3. View the list of notifications feeds for:
   - Incident
   - HR case
   - Change request
   - Requested item
4. Click the notification to view the details.



Approve or reject requests from Microsoft Teams

Approve or reject requests by using the approval notification in Microsoft Teams.

Before you begin

For information about configuring approval notifications, see Approvals hub.

Role required: user

Procedure

1. Launch the Microsoft Teams application.
2. Select **Activity**.
3. View the list of notifications feeds for the following:

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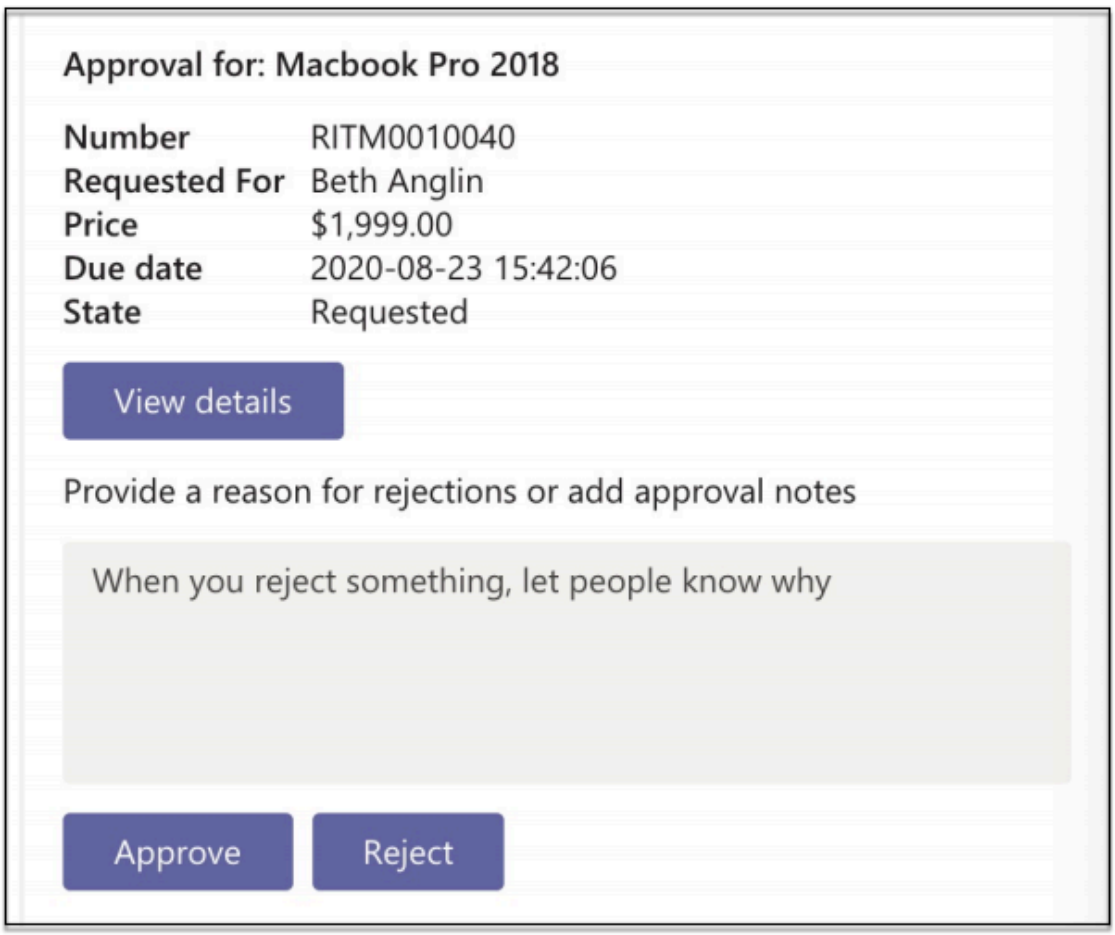
- Request
- Change Request

4. Select a notification to view the details.



5. **Optional:** Select **View details** to view the complete details of the ticket.
6. Enter a comment as required.
7. Select either **Approve** or **Reject** to update the request.

Respond to a comment in a notification

A comment in the activity stream generates a notification to which the user can respond directly, without leaving Microsoft Teams.

Before you begin

Role required: user

About this task

If the user needs to take an additional action, such as attaching a document, they must click **View Ticket Details** to go to the ticket in a Service Portal.

Procedure

1. Launch Microsoft Teams application.
2. Click **Activity**.
3. View the list of notifications feeds for:

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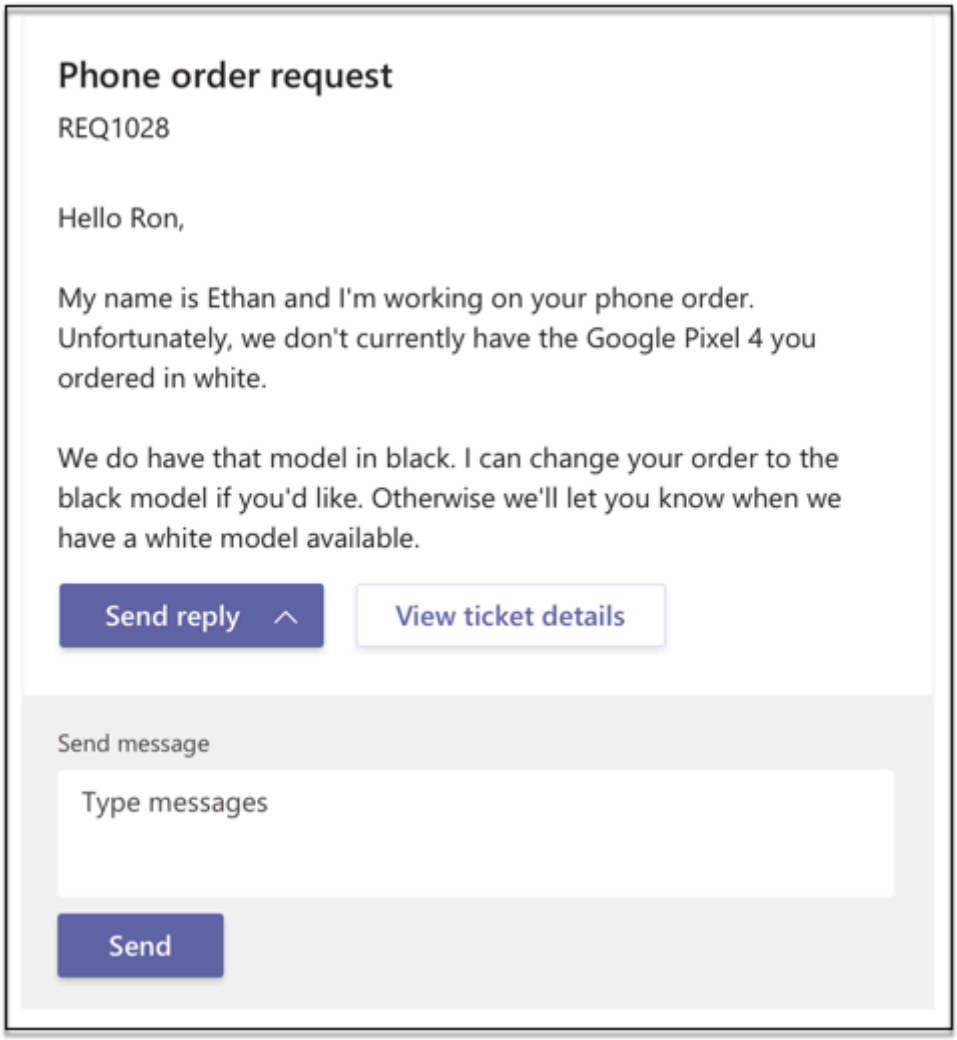
- Incident
- HR case
- Change request
- Requested item

4. Click the notification to view the details.



5. Click **Send reply**.
6. Enter your comment.
7. Click **Send**.
8. Click **View ticket details** to view the complete details of the ticket.

View notifications for a major incident

View the notifications that are sent during specific events in a major incident. These notifications are sent to all the stakeholders associated with the major incident.

Before you begin

Role required: major_incident_manager, agent

About this task

The following informational notifications are triggered for a major incident when:

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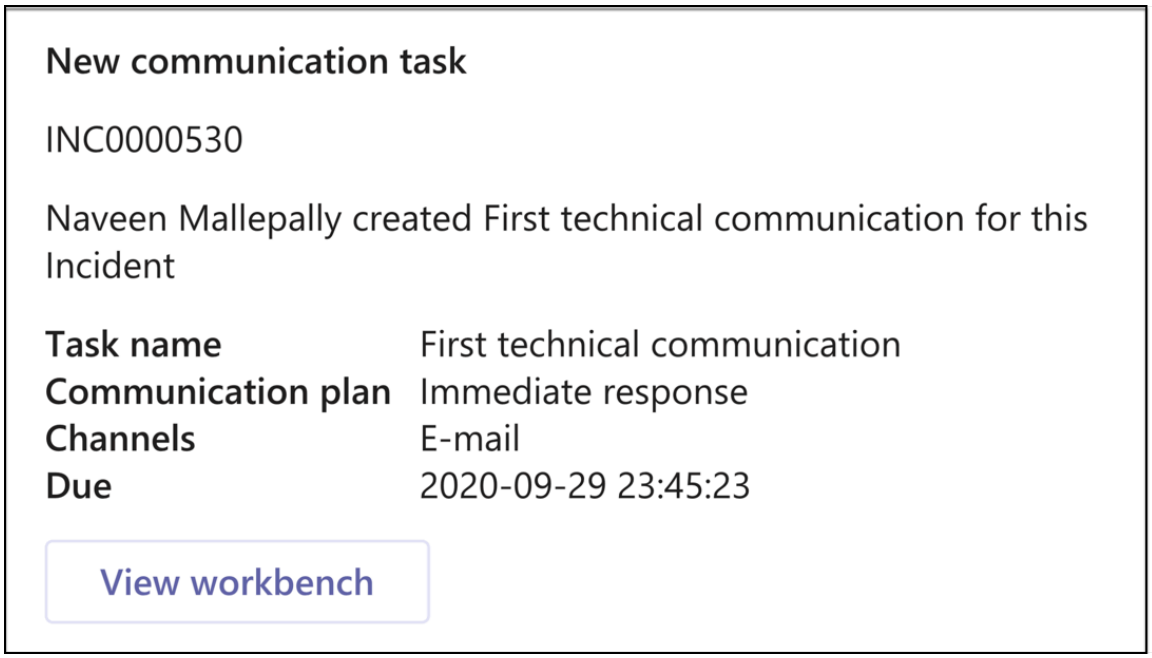
- A communication task is created for a major incident
- SLA reaches 75%
- SLA is breached

Procedure

1. Launch **Microsoft Teams** application.
2. Click **Activity**.
3. View the list of notifications feeds for the major incident.
4. Click the notification to view the details.



5. Click **View workbench** to view the ticket details in ServiceNow.

Employee Center dashboard

Use the Employee Center dashboard from Microsoft Teams to view the widgets that show pending tasks, requests, and the internal company announcements.

Your Hub dashboard is replaced with **Employee Center** dashboard from Rome.

With embedded Employee Center, you can request help, search for self-service content, and work on your tasks from within Microsoft Teams.

For customers with Employee Center, Content managers and Communications Specialists are able to use Microsoft Teams as an additional channel to reach employees with personalized and timely communications.

Launch Microsoft Teams. Navigate to **ServiceNow for Microsoft Teams** > **Employee Center**.

Access a Microsoft Teams chat in Employee Center

Access a ticket's Microsoft Teams chat in the Employee Center.

Before you begin

Role required: user

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About this task

You can view chats on the Teams Chat widget only if you are added to that chat conversation by the agent and you have access to the associated ticket. If you are on the watch list of an incident and can view the ticket on the ServiceNow portal, you can view the associated chats.

Messages are loaded dynamically. The Teams Chat widget does not display message reactions but it does display emojis contained in messages.

Procedure

1. Launch Microsoft Teams.
2. Navigate to **ServiceNow for Microsoft Teams** > **Employee Center** > **My Requests**.
3. Open the ticket.
4. Select **Teams chat**.
5. Select a chat to view details.
   If more than one chat is available for a ticket, choose the desired chat from the list that appears on the left.
6. Continue the chat in either the desktop version or the mobile version.
   - For the desktop version, select **Open in Microsoft Teams Desktop**.
   - For the mobile version, select **Open in Microsoft Teams Browser**.

Manage approvals from Microsoft Teams

Manage Concur expense approvals using Virtual Agent actionable notifications in Microsoft Teams to resolve the approval directly in the Virtual Agent conversation without involving a live agent.

Before you begin

- The Virtual Agent integration is supported only for users who have a user record in your ServiceNow instance. Users must link their accounts to Microsoft Teams and enable Virtual Agent notifications.
- Install the Approvals hub integration with the SAP Concur (sn_ex_cnc) plugin.

For more information on receiving notifications, see Conversational Integration with Microsoft Teams and Enable Virtual Agent notifications. For more information on Virtual Agent, see Virtual Agent.

Role required: approver_user

Procedure

1. Launch the Microsoft Teams application.
2. Open the **Now Virtual Agent** chat window.
3. Enter `Show notification` in the chat window.
4. **Optional:** View the report by selecting **View Report**.
   You can also view the report later by selecting **Skip** and entering `Show notification` in the chat window.
5. **Optional:** View expense and receipt items by selecting **Expenses and Receipts**.
   A maximum of 12 expense items are displayed in the report. To view all items, select **View full report**.
6. Approve or reject the report.

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Note: You cannot accept or reject a report if the assigned approver has been modified or the report has been updated or closed.

Decision	Action
Approve the report	Select **Approve**.
Reject the report	**a.** Select **Send back**. **b.** Enter a reason for rejecting the report.

Agent actions

Agents can work on the service-related tickets created by the employees.

Request based chat - Start and import chat from classic view

Initiate a conversation with the requester to resolve the ticket.

You must have the "write" role to use the **Start Microsoft Teams chat** and **Import messages from Microsoft Teams** features for an incident, request, change request and a catalog task. This role is available when you activate the ITSM roles plugin, or for all the instances starting the Madrid release.

Record and Role

Record	Role	Plugin
Incident	sn_incident_write	ITSM Roles - Incident Management (com.snc.itsm.roles.incident_management) plugin
Change Request	sn_change_write	ITSM Roles — Change Management (com.snc.itsm.roles.change_management) plugin
Request	sn_request_write	ITSM Roles — Request Management (com.snc.itsm.roles.request_management) plugin
HR Case	sn_hr_core.case_writer	Human Resources Scoped App — Employee Relations [com.sn_hr_employee_relations] plugin

Request-based chat - Start and import chat from field decorator

Interact with a requester in Microsoft Teams from the chat icon from the workspace to quickly resolve the ticket.

Before you begin

Role required: user with access to the respective records

Procedure

1. Navigate to an open ticket (an incident, a change request, a request item, an HR case or a catalog task) in your ServiceNow instance.
2. Point to  next to the **Caller** field.
3. Within the dialog box that appears, select the participants for the chat.

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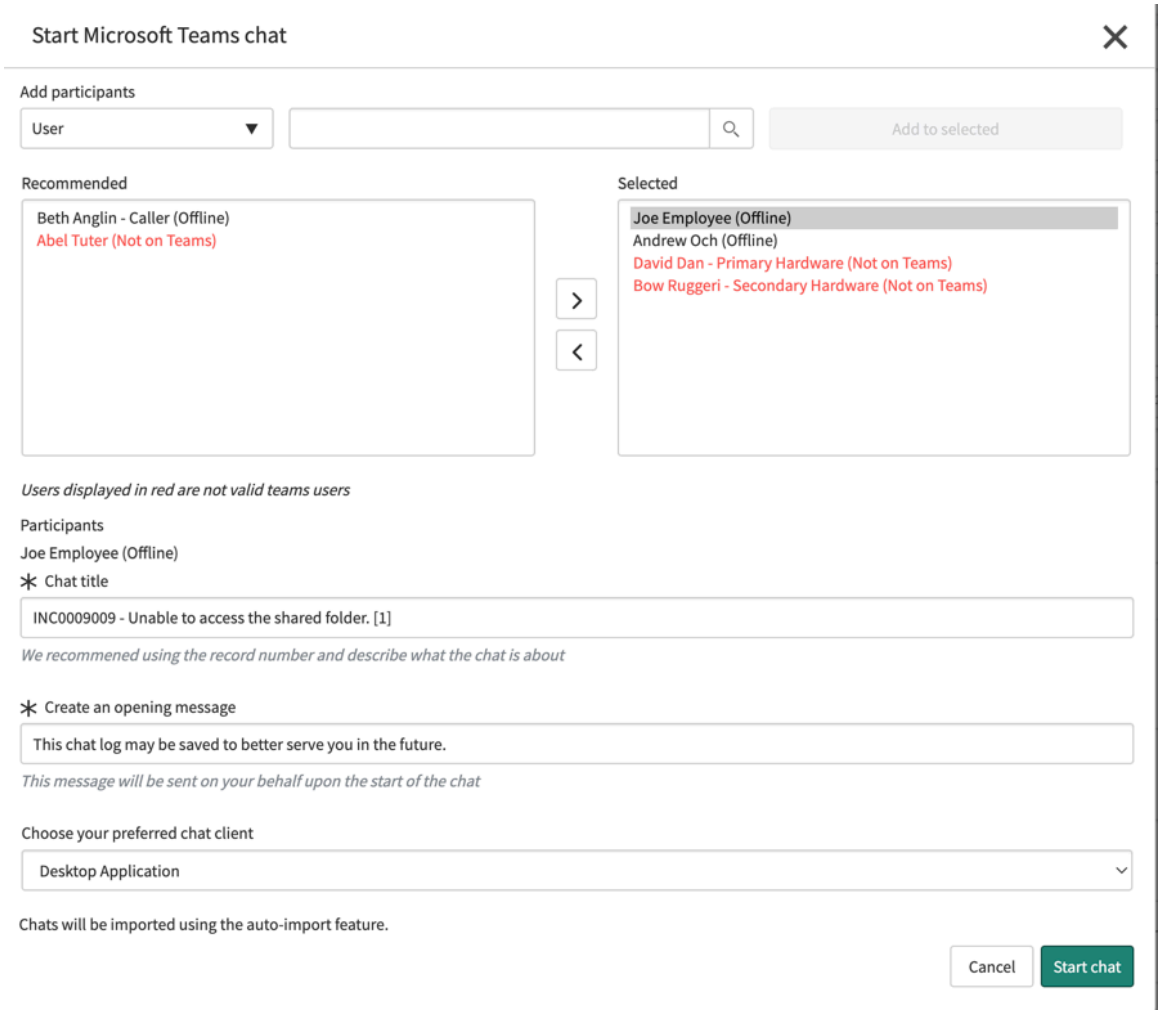

The dialog box displays the **Recommended** and **Selected** participants along with their current presence status in Microsoft Teams.

All users from the assigned group for the ticket are in the recommended section by default. The user who initiates the chat is added to the selected list of participants.

4. On the form, fill the fields.

Start chat modal fields

Field	Description
Add Participants	Option to add the users and the stakeholders to work towards the resolution of the ticket. ○ **Users**: Enter the name of the user to include in the chat. ○ **Group**: Enter the group of users to be included in the chat. If the On-Call Scheduling (com.snc.on_call_rotation) plugin is activated, the On-Call Scheduling users will be added when you select a group. On-Call Scheduling

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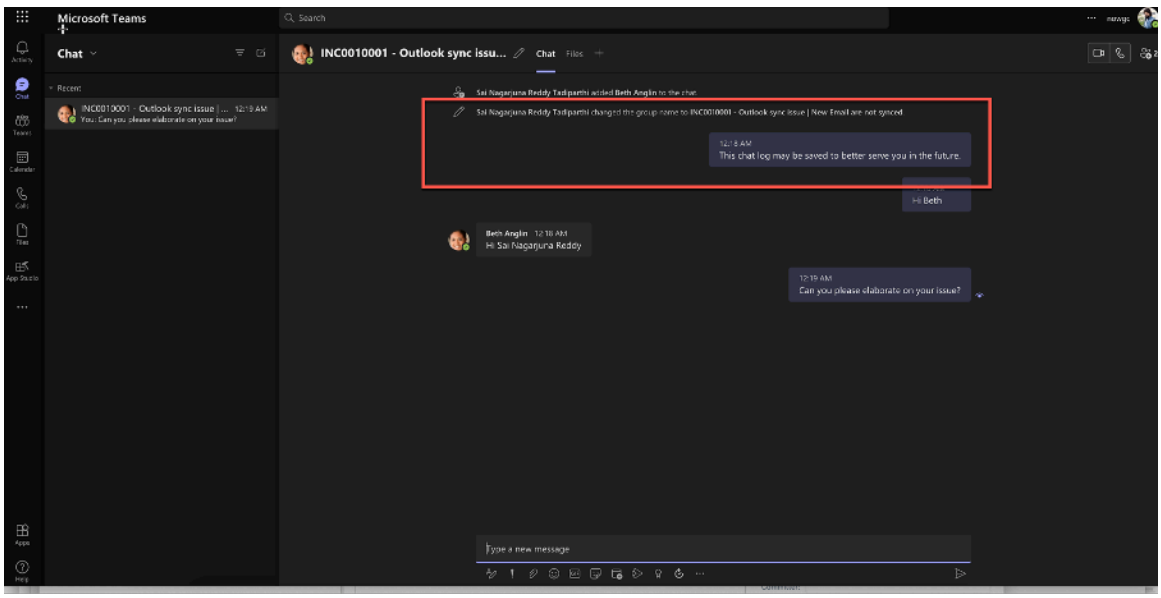
Field	Description
	(com.snc.on_call_rotation) plugin isn't activated, it adds all users from the selected group. ○ **Email**: Enter a valid email of the participant to be included in the chat. After adding the required stakeholders, click **Add to selected**.
Chat title	The chat title specified shows up as the title of the chat in Microsoft Teams. The default title is the ticket number appended with the short description. You can modify the chat title.
Create an opening message	Option to provide an opening message to the user before beginning the interaction.
Choose your preferred chat client	Option to choose the default chat client. ○ Desktop Application – Open the chat interaction in Microsoft Teams desktop application. ○ Web Client – Opens the chat interaction in Microsoft Teams web client. The system remembers the selected option and will open the chats in the preferred chat client for all the further chat interactions.

5. Click **Start Chat**.

   The Microsoft Teams app displays the chat title and the opening message provided by the agent.



   The system captures the work notes about the chat details.

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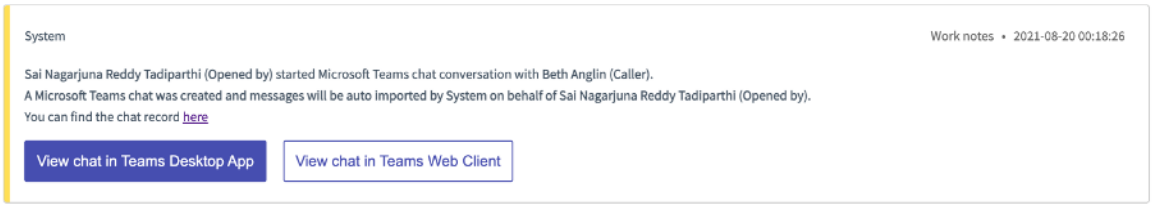
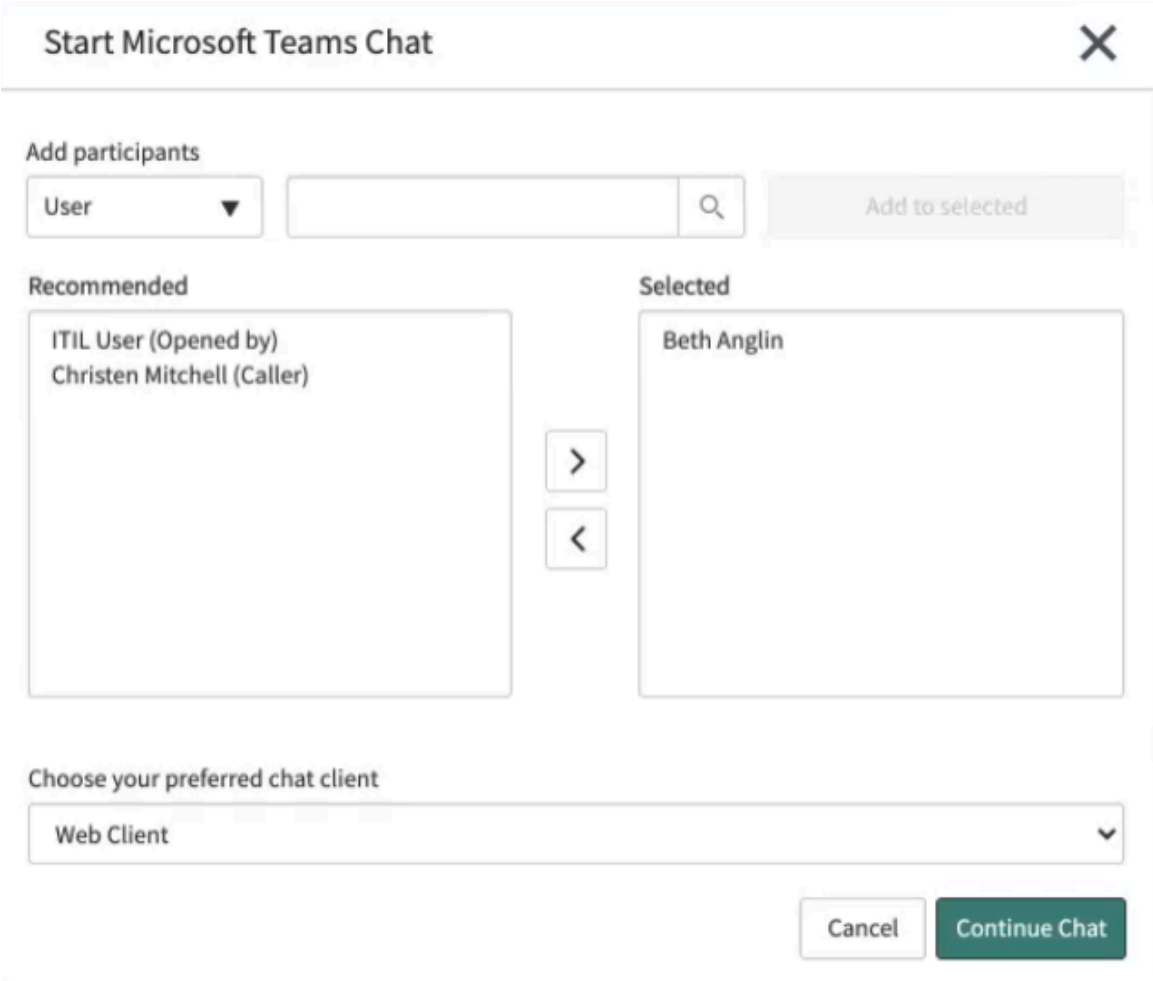


If the agent initiates the chat from the record with the same user, the **Start Microsoft Teams Chat** appears as shown.



The system displays **Continue Chat** button to resume the conversation. However, if any other user is added, the chat modal displays the **Chat title** and the **Create an opening message** fields.

The interaction is only created when the conversation is with the requester. If the conversation doesn't include the requester, such as a conversation between the agent and a collaborator, an interaction is not created, but the Microsoft Teams chat record is still created.

A Microsoft Teams chat interaction is automatically created and you can access the chat details from the Activities log.

a. In the Activities log of the record, look for the comment that has the link to access the chat interaction.

b. Click the link.

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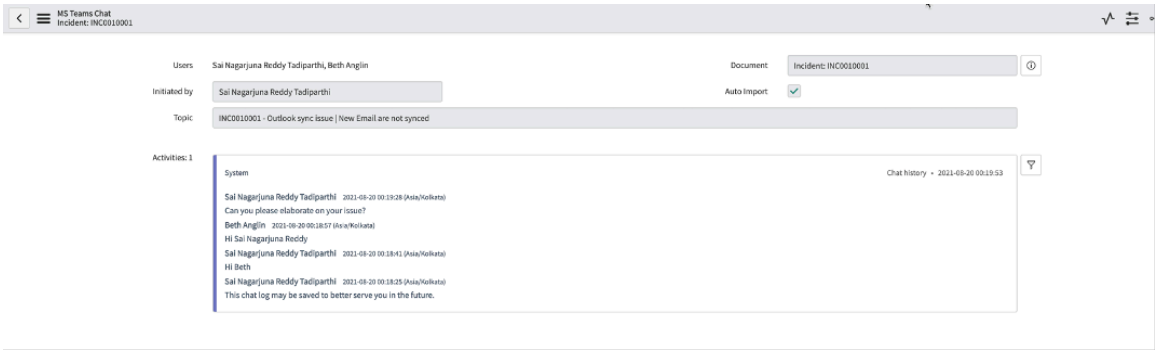
The chat transcript is stored in the **Activities** section.



Chat activities table

Field	Description
Users	Users associated with the chat
Document	Source record number
Initiated by	Agent who has initiated the chat interaction.
Auto Import	Status of the auto-import messages. If the option is not selected, the messages pertaining to the record will not be auto-imported.
Topic	Chat title
Activities	Chat transcript

Request-based chat - Start and import chat from Start Microsoft Teams chat action

Interact with a requester in Microsoft Teams for an issue related to an incident, request item, change request, and HR case records to quickly resolve the ticket.

Before you begin

Role required: user with access to the respective records

Procedure

1. Navigate to an open ticket (Incident, change request, request item, HR case or a catalog task) in your ServiceNow instance.
2. Click **Start Microsoft Teams Chat**.
3. Within the dialog box that appears, select the participants for the chat.

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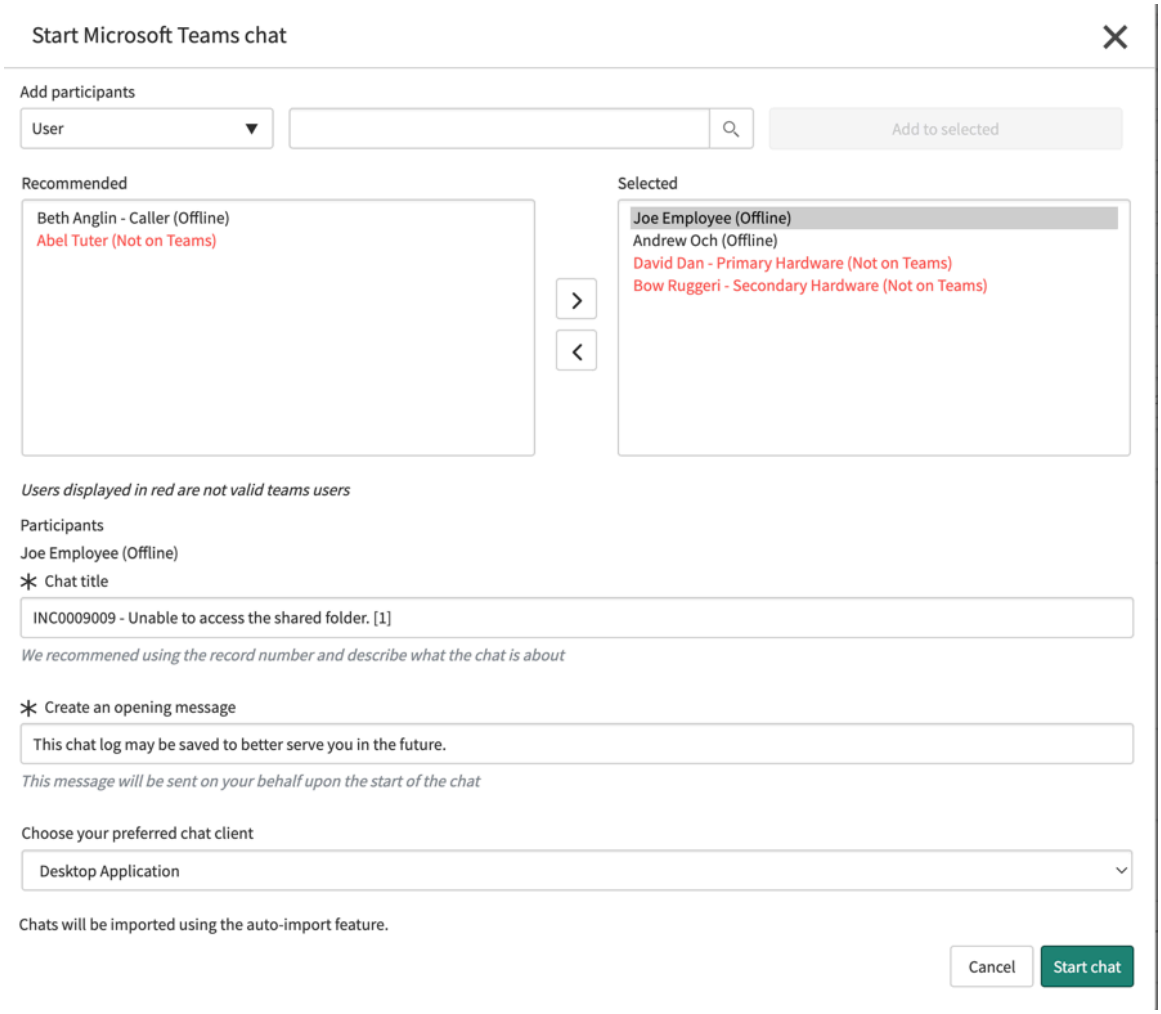

The dialog box displays the **Recommended** and **Selected** participants along with their current presence status in Microsoft Teams.

All users from the assigned group for the ticket are in the recommended section by default. The user who initiates the chat is added to the selected list of participants.

4. On the form, fill the fields.

Start chat modal fields

Field	Description
Add Participants	Option to add the users and the stakeholders to work towards the resolution of the ticket. ○ **Users**: Enter the name of the user to include in the chat. ○ **Group**: Enter the group of users to be included in the chat. If the On-Call Scheduling (com.snc.on_call_rotation) plugin is activated, the On-Call Scheduling users will be added when you select a group. On-Call Scheduling

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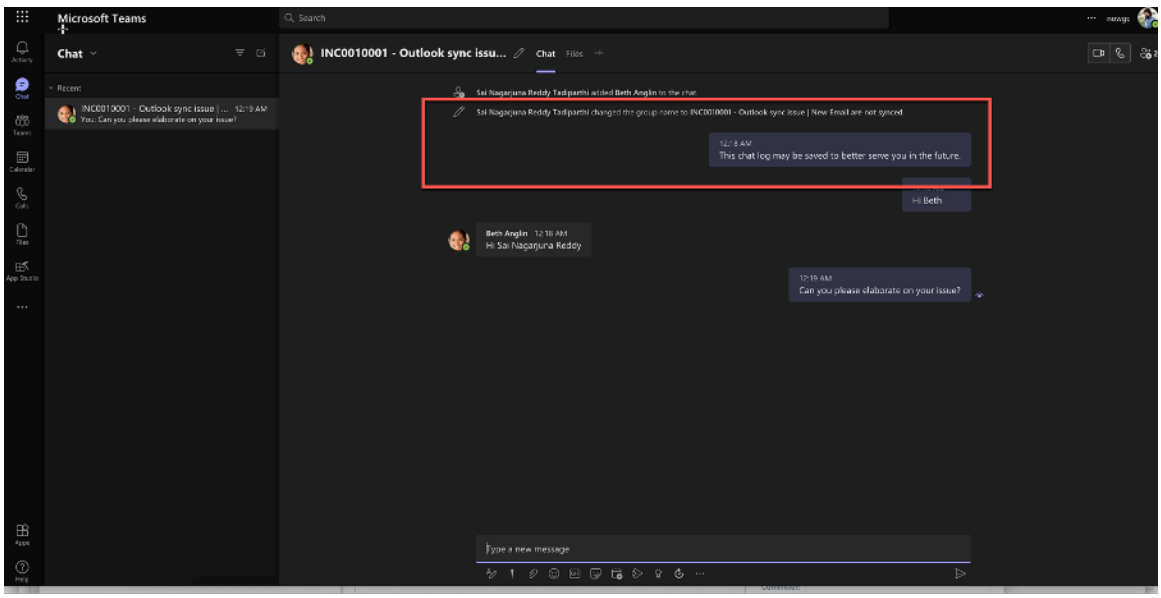
Field	Description
	(com.snc.on_call_rotation) plugin isn't activated, it adds all users from the selected group. ○ **Email**: Enter a valid email of the participant to be included in the chat. After adding the required stakeholders, click **Add to selected**.
Chat title	The chat title specified shows up as the title of the chat in Microsoft Teams. The default title is the ticket number appended with the short description. You can modify the chat title.
Create an opening message	Option to provide an opening message to the user before beginning the interaction.
Choose your preferred chat client	Option to choose the default chat client. ○ Desktop Application – Open the chat interaction in Microsoft Teams desktop application. ○ Web Client – Opens the chat interaction in Microsoft Teams web client. The system remembers the selected option and will open the chats in the preferred chat client for all the further chat interactions.

5. Click **Start Chat**.

   The Microsoft Teams app displays the chat title and the opening message provided by the agent.



   The system will capture the work notes about the chat details.

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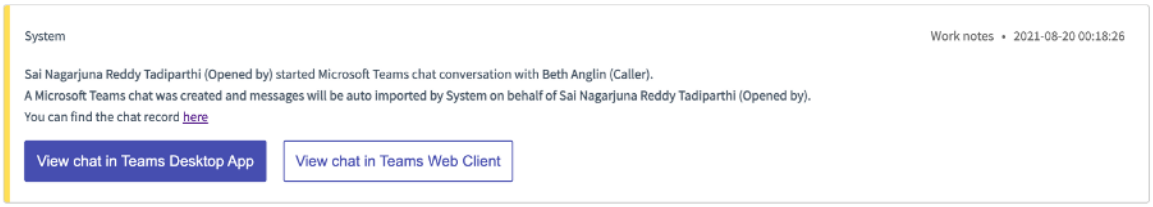
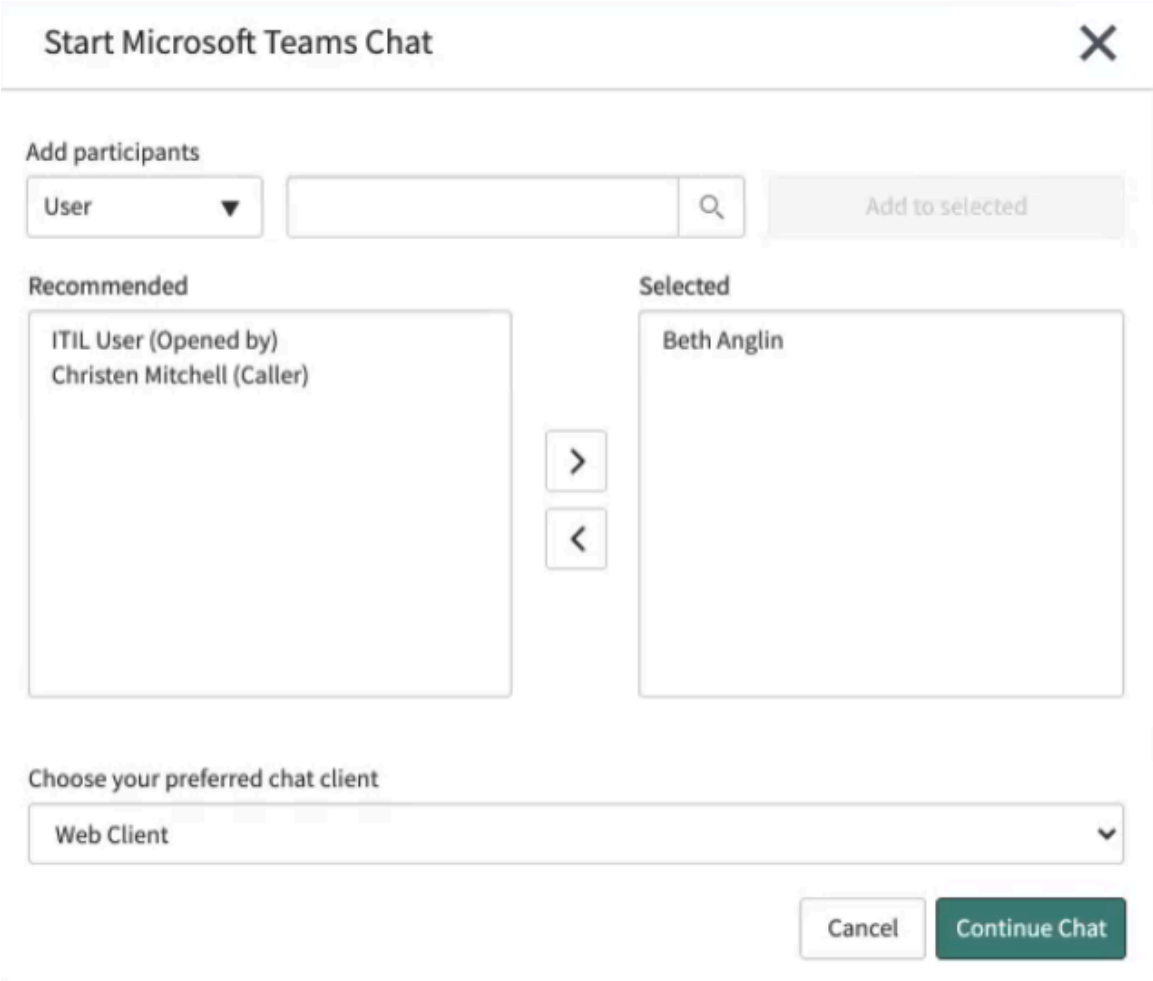


If the agent initiates the chat from the record with the same user, the **Start Microsoft Teams Chat** appears as shown.



The system displays **Continue Chat** button to resume the conversation. However, if any other user is added, the chat modal displays the **Chat title** and the **Create an opening message** fields.

A Microsoft Teams chat interaction will be automatically created and you can access the chat details from the Activities log.

a. In the Activities log of the record, look for the comment that has the link to access the chat interaction.

b. Click on the link.

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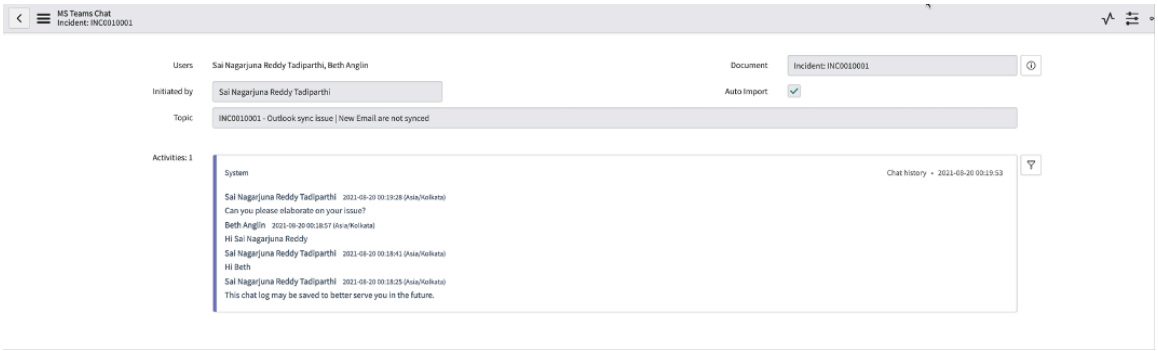
The chat transcript is stored in the **Activities** section.



Chat activities table

Field	Description
Users	Users associated with the chat
Document	Source record number
Initiated by	Agent who has initiated the chat interaction.
Auto Import	Status of the auto-import messages. If the option is not selected, the messages pertaining to the record will not be auto-imported.
Topic	Chat title
Activities	Chat transcript

Import messages from a ticket manually

You can import the conversation with a user from Microsoft Teams and append them in the **Comments** to store all the important messages in the ServiceNow instance.

Before you begin

Role required: user

About this task

Importing messages helps agents to view the history of the ticket, allow the requester to see all discussions about their ticket in one place. This helps to capture the information required for post-ticket review and continuous improvement processes.

Procedure

1. Navigate to an open ticket (Incident, change request, request item, HR case or a catalog task) in your ServiceNow instance.
2. Click **Import messages from Microsoft Teams**.
3. On the **Import messages from Microsoft Teams** form, fill in the fields:

Import messages from Microsoft Teams table

Field	Description
Show conversations	Choose from:

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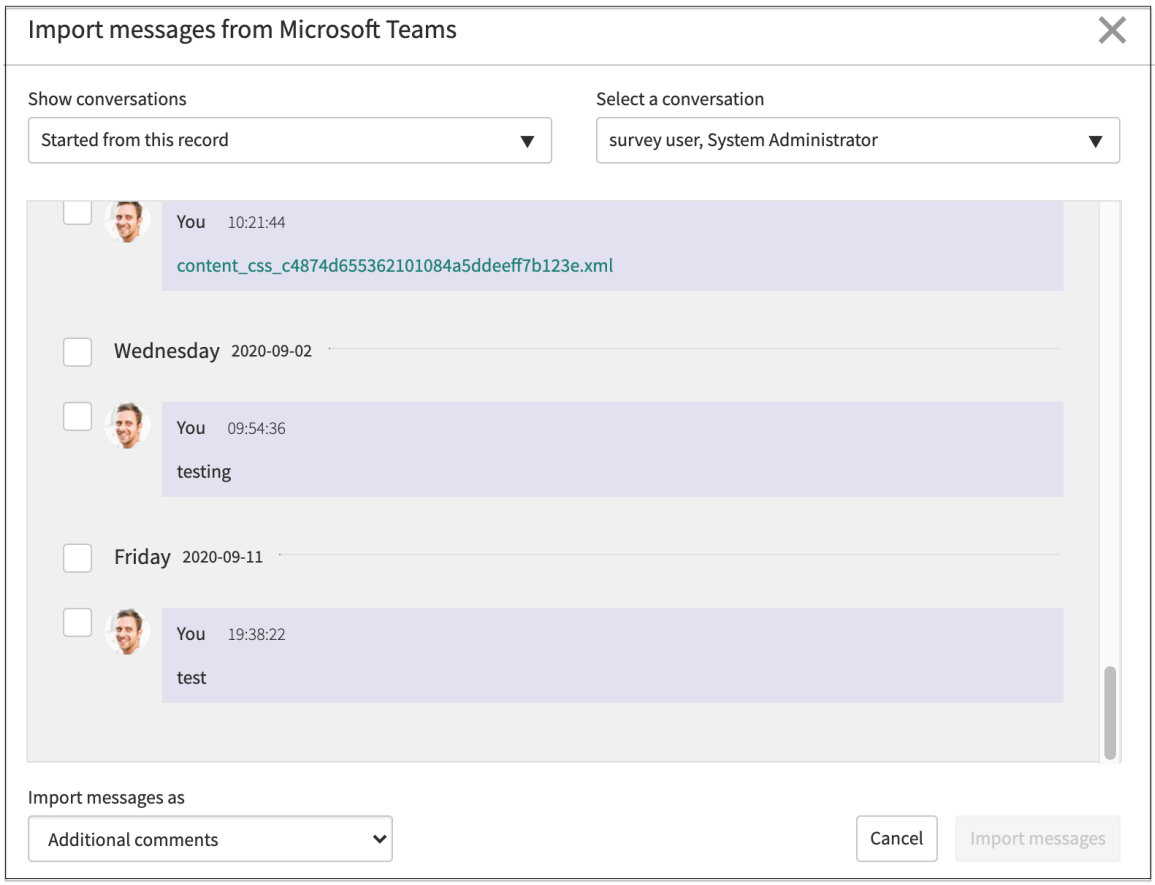
Field	Description
	○ Started from this record: Lists all the communication tasks created for the record. ○ List all conversations: Lists all conversations by the logged in agent.
Select a conversation	Choose a conversation to import the messages for the record.
Import messages as	○ **Additional comments**: The messages will be appended under Additional comments. ○ **Work notes**: The messages will be appended under Work notes.



4. Select the messages, files, and the images you would like to import and click **Import messages**.

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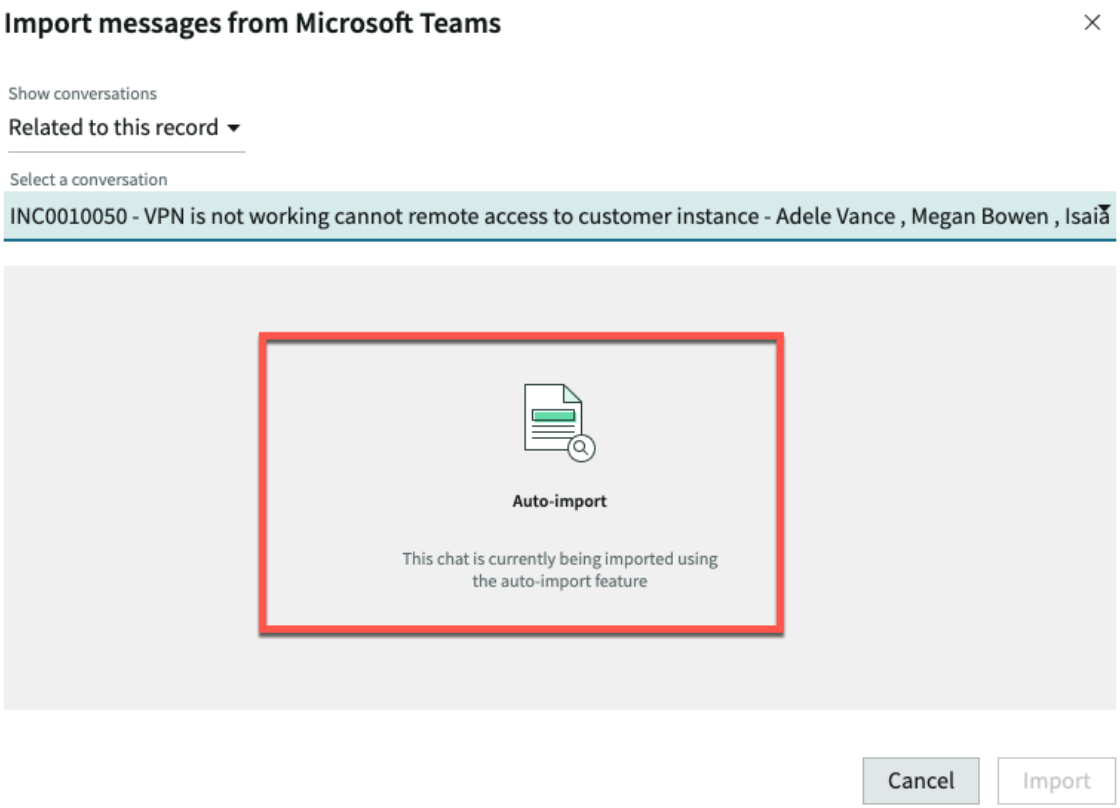
If you try to import the messages manually for a ticket that will automatically import the messages, the system displays a message that the chat is being imported using auto-import.



Request-based chat - Start and import chat from Workspace

Initiate a conversation with the requester to resolve the ticket.

Request-based chat - Start and import chat from field decorator

Interact with a requester in Microsoft Teams for an issue related to an incident, request item, change request, and a catalog task ticket to quickly resolve the ticket.

Before you begin

Role required: user with access to the respective records

Procedure

1. Navigate to an open ticket (an incident, a change request, a request item, an HR case, or a catalog task) in your ServiceNow instance.
2. Point to  next to the **Opened for** field.
   The chat is initiated with the user in **Microsoft Teams**.

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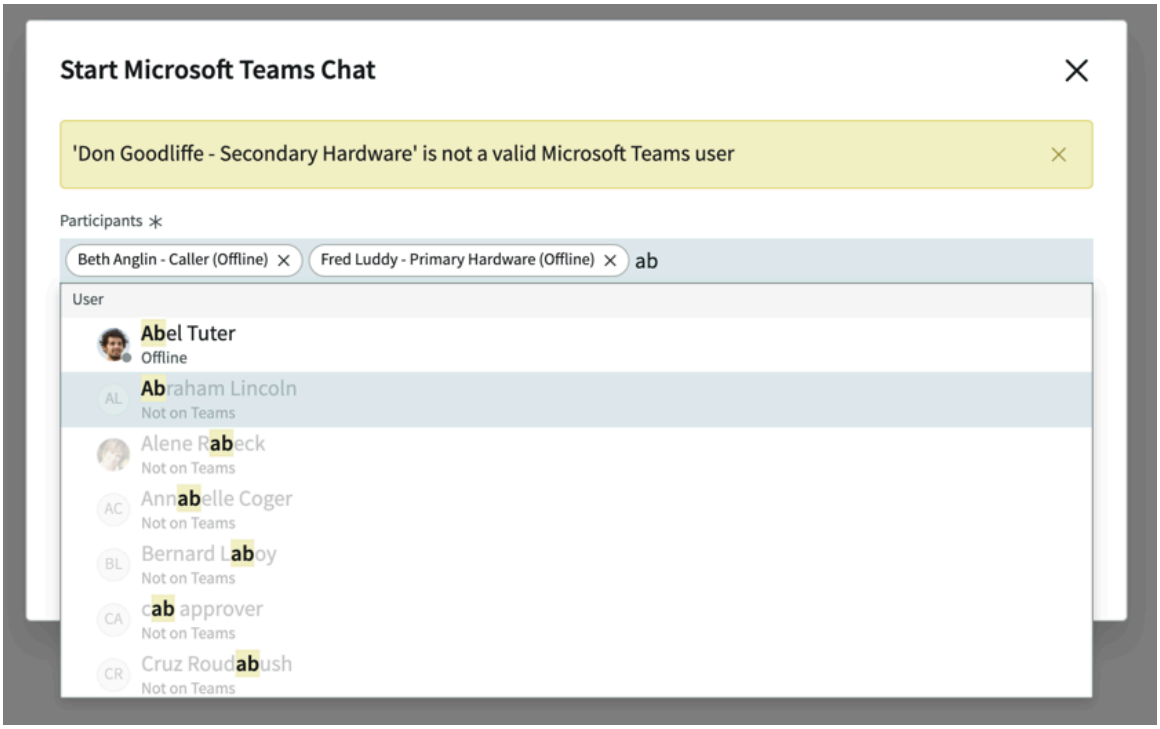

When you start typing the names of the participants, the system displays their current status in Microsoft Teams. The status is also displayed against their name in the **Participants** field.

3. On the form, fill in the fields.

Start chat

Field	Description
Participants	Option to add the users and the stakeholders to work towards the resolution of the ticket.
Groups	Option to add the groups required to work towards the resolution of the ticket.
Recommended	System displays the list of users associated with the ticket. Select the user to include in the chat conversation.
Chat title	The chat title specified shows up as the title of the chat in Microsoft Teams. The default title is the ticket number appended with the short description. You can modify the chat title.
Create an opening message	Option to provide an opening message to the user before beginning the interaction.
Choose your preferred chat client	Option to choose the default chat client. ○ Desktop Application – Open the chat interaction in Microsoft Teams desktop application. ○ Web Client – Opens the chat interaction in Microsoft Teams web client.

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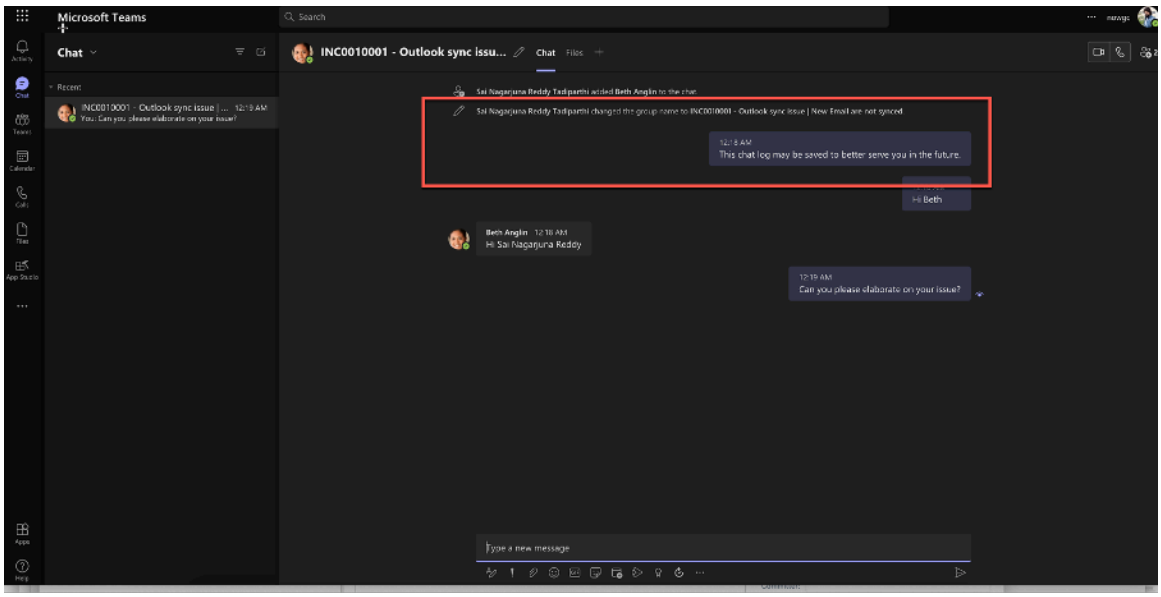
Field	Description
	The system remembers the selected option and will open the chats in the preferred chat client for all the further chat interactions.

4. Click **Start Chat**.

   The Microsoft Teams app displays the chat title and the opening message provided by the agent.



   The system captures the work notes about the chat details.

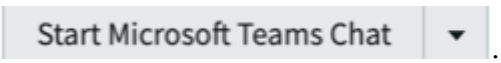
Request-based chat - Start and import chat from Start Microsoft Teams chat action

Interact with a requester in Microsoft Teams from the workspace to quickly resolve the ticket.

Before you begin

Role required: user with access to the respective records

Procedure

1. Navigate to an open ticket in your ServiceNow instance.
2. Click 

.
   The chat will be initiated with the requester in Microsoft Teams.

   When you start typing the names of the participants, the system displays their current status in Microsoft Teams. The status is also displayed against their name in the **Participants** field.

3. On the form, fill in the fields.

Start chat

Field	Description
Participants	Option to add the users and the stakeholders to work towards the resolution of the ticket.

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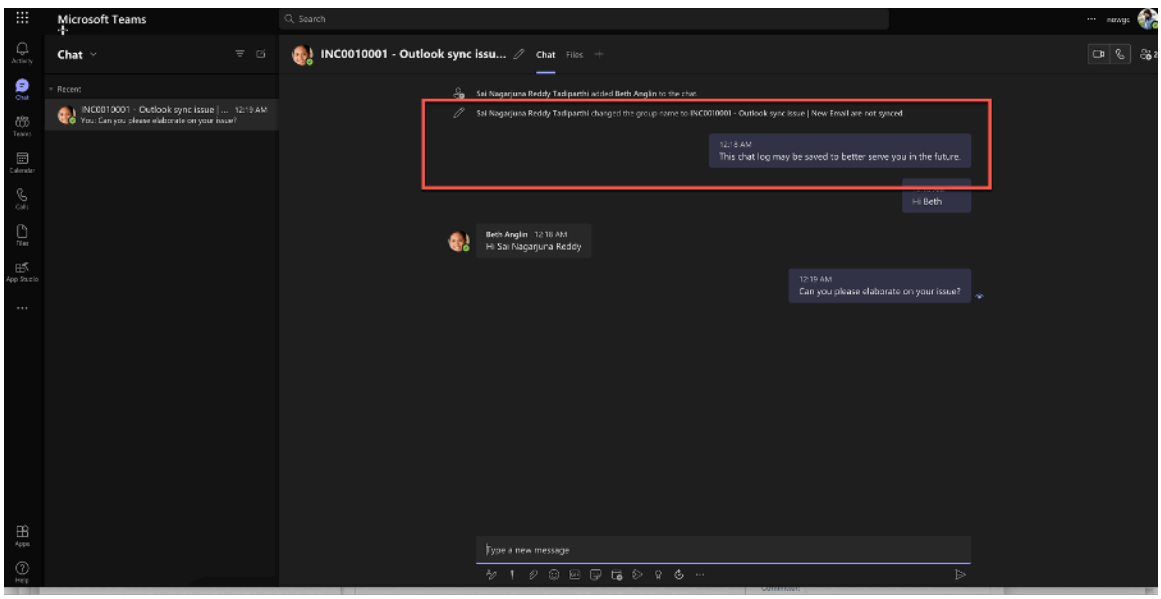
Field	Description
Groups	Option to add the groups required to work towards the resolution of the ticket.
Recommended	System displays the list of users associated with the ticket. Select the user to include in the chat conversation.
Chat title	The chat title specified shows up as the title of the chat in Microsoft Teams. The default title is the ticket number appended with the short description. You can modify the chat title.
Create an opening message	Option to provide an opening message to the user before beginning the interaction.
Choose your preferred chat client	Option to choose the default chat client. ○ Desktop Application – Open the chat interaction in Microsoft Teams desktop application. ○ Web Client – Opens the chat interaction in Microsoft Teams web client. The system remembers the selected option and opens the chats in the preferred chat client for all the further chat interactions.

4. Click **Start Chat**.

The Microsoft Teams app displays the chat title and the opening message provided by the agent.



The system captures the work notes about the chat details.

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Import messages from Agent Workspace

You can import the conversation with a user from the agent workspace and append them in the **Comments** to store all the important messages in the ServiceNow.

Before you begin

Role required: user

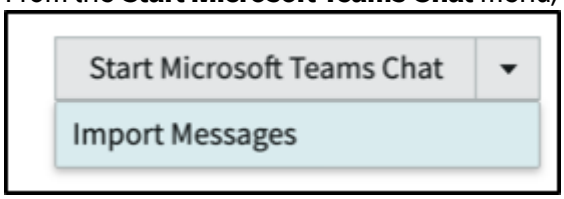
Procedure

1. Navigate to an open ticket in your ServiceNow instance from agent work space.

Navigational path

Record	Description
Incident	Navigate to **Incident** > **Open**. Open the record that you want to work on.
Change Request	Navigate to **Change** > **Open**. Open the record that you want to work on.
Request Item	Navigate to **Requests** > **Open Requests**. Open the record that you want to work on.

2. From the **Start Microsoft Teams Chat** menu, select **Import messages**.



Note: If you aren't logged in, you receive a prompt to log into Microsoft Teams.

3. Select the messages that you would like to import, then select **Import messages**.

Request-based chat - Start chat with guest user from a record

Start a Microsoft Teams chat with the guest user of an external and allowed domain through a record.

Before you begin

The guest user must be authenticated with chat access. For more information, see Enable chat access for guest users for self-configured app and Enable chat access for a guest user for pre-published app instances.

The guest users list is fetched from the Microsoft Entra ID. For more information, see Guest access in Microsoft Teams.

Role required: agent

About this task

For information about starting a chat with an external user who is not added in the allowed-guest domains list, see Add or invite people outside your Teams org to a chat.

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Procedure

1. Launch Microsoft Teams.
2. Navigate to **ServiceNow for Microsoft Teams** > **Employee Center** > **My Requests**.
3. Open the ticket that you want to work on in your ServiceNow instance.
4. On the form, fill in the fields.

Ticket form

Field	Description
Assignment group	Search and select **Teams group**.
Short description	Description of the chat purpose.

5. Right-click in the form header and select **Save**.
6. Select **Start Microsoft Teams Chat**.
7. Select the user that you want to chat with.

   You can select the requester and employees, or multiple guests from different domains.

8. Select **Start Chat**.

   On the web client, the domain associated Tenant ID appends to your Microsoft Teams URL.

   The chat opens in the Microsoft Teams application.

Result

All team members see an announcement message in the Microsoft Teams channel thread that the team owner has added a guest and the guest name is listed. A tag in the upper-right corner of the channel thread indicates the number of guests on the team and a **(Guest)** label appears next to each guest name.

Note:

A tag with the label **External** indicates that a user is guest and not present in the allowed-domain.

Request-based chat - Start and import chat as guest user from classic view

You can start a Microsoft Teams chat with an external organization user and import chat after you are invited to their chat.

The following configuration must be complete for a guest user from an allowed-domain to initiate or import chat.

- Enable chat access to a guest user
- Configure external collaboration for a guest user
- Add a guest user to the Microsoft Entra ID

For more information, see Enable chat access for guest users for self-configured app, Enable chat access for a guest user for pre-published app, and Guest access in Microsoft Teams.

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Note:

As a guest user, you can import chat only if you are present in the allowed-domain but you can initiate a chat. A tag with the label **External** appears by your name to indicate that you are a guest user and not present in the allowed-domain. For more information, see Add or invite people outside your Teams org to a chat.

Start a Microsoft Teams chat as a guest user

Start a Microsoft Teams chat as a guest user with an external organization user.

Before you begin

You must have received and accepted an invitation as a guest user either in email or through Microsoft Teams.

Role required: agent

About this task

This procedure is accomplished through the classic ServiceNow UI. For information about the same procedure accomplished through the workspace, see Request-based chat - Start and import chat from Start Microsoft Teams chat action.

Procedure

1. Launch Microsoft Teams.
2. Navigate to **ServiceNow for Microsoft Teams** > **Employee Center** > **My Requests**.
3. Open the ticket that you want to work on in your ServiceNow instance.
4. Select **Start Microsoft Teams Chat**.
5. Log in to your Microsoft email account if prompted.
6. Select the user that you want to chat with.

   You can select the requester, employees, or multiple guests from different domains.

7. Select **Start Chat**.

   On a web client, the domain-associated Tenant ID appends to your Microsoft Teams URL.

Result

The chat opens in the Microsoft Teams application.

Import a Microsoft Teams chat as a guest user

Import your Microsoft Teams chat with an external organization user as a guest user.

Before you begin

Role required: agent

About this task

This procedure is accomplished through the classic ServiceNow® user interface. For information about the same procedure accomplished through the workspace, see Import messages from Agent Workspace.

When a guest imports a chat, attachments are not uploaded to the record. Attachments appear as a link to the file on the Microsoft OneDrive application.

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Procedure

1. Launch Microsoft Teams.
2. Navigate to **ServiceNow for Microsoft Teams** > **Employee Center** > **My Requests**.
3. Open the ticket that you want to work on in your ServiceNow instance.
4. Select **Import messages from Microsoft Teams**.
5. On the Import messages from Microsoft Teams form, select the **Show conversations** list and determine the conversations to display.
   - To list all the conversations created for the record, select **Started from this record**.
   - To list all conversations related to the logged-in agent, select **Started from this record**.
6. Select the **Select a conversation** list and choose the messages, files, and the images you want to import.
7. On the Import messages from Microsoft Teams form, select the **Import messages as** list and choose the location to append the imported messages.
   - To append the imported messages in the **Additional comments** field and allow customers to view messages, select **Additional comments**.
   - To append the imported messages in the **Work notes** field and keep the messages internal, select **Work notes**.
8. Select **Import**.

Promote chat to a call from workspace

As an agent, you can initiate a chat with the caller from the workspace to quickly resolve the issue.

Before you begin

Role required: itil, itil_admin

Procedure

1. Navigate to **All** > **Workspace Home** > **Inbox**.
2. From your inbox, click **Accept** to accept a chat.

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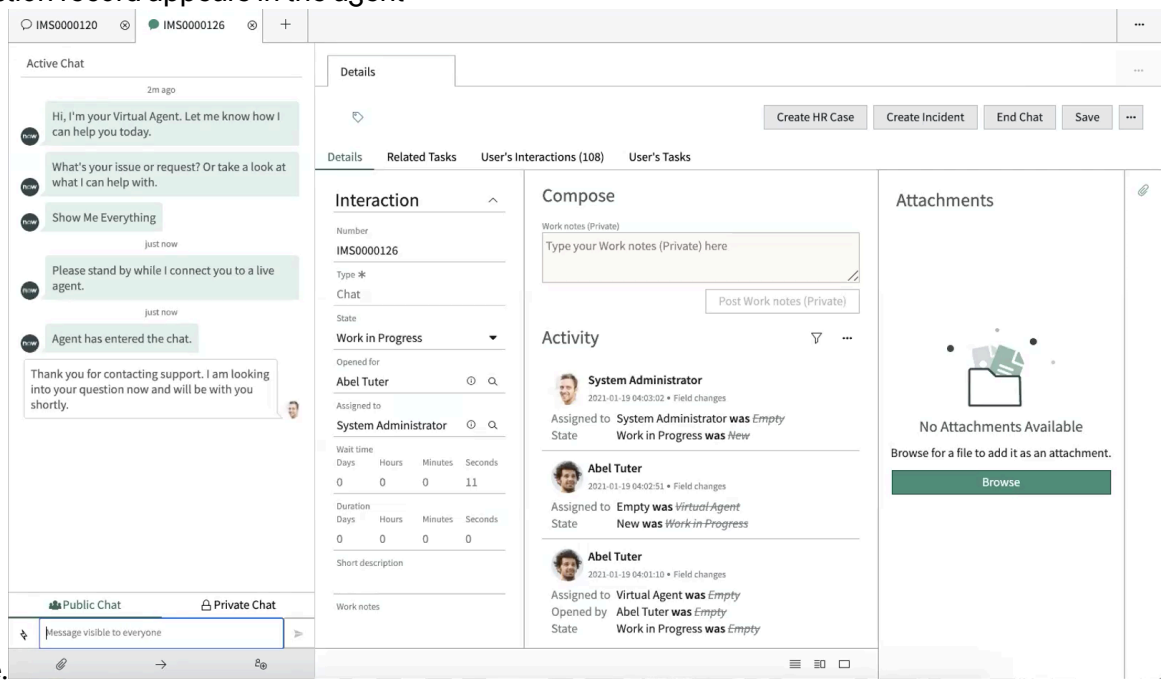
The interaction record appears in the agent workspace.



3. In the message input field, enter the command `/teams_call`.

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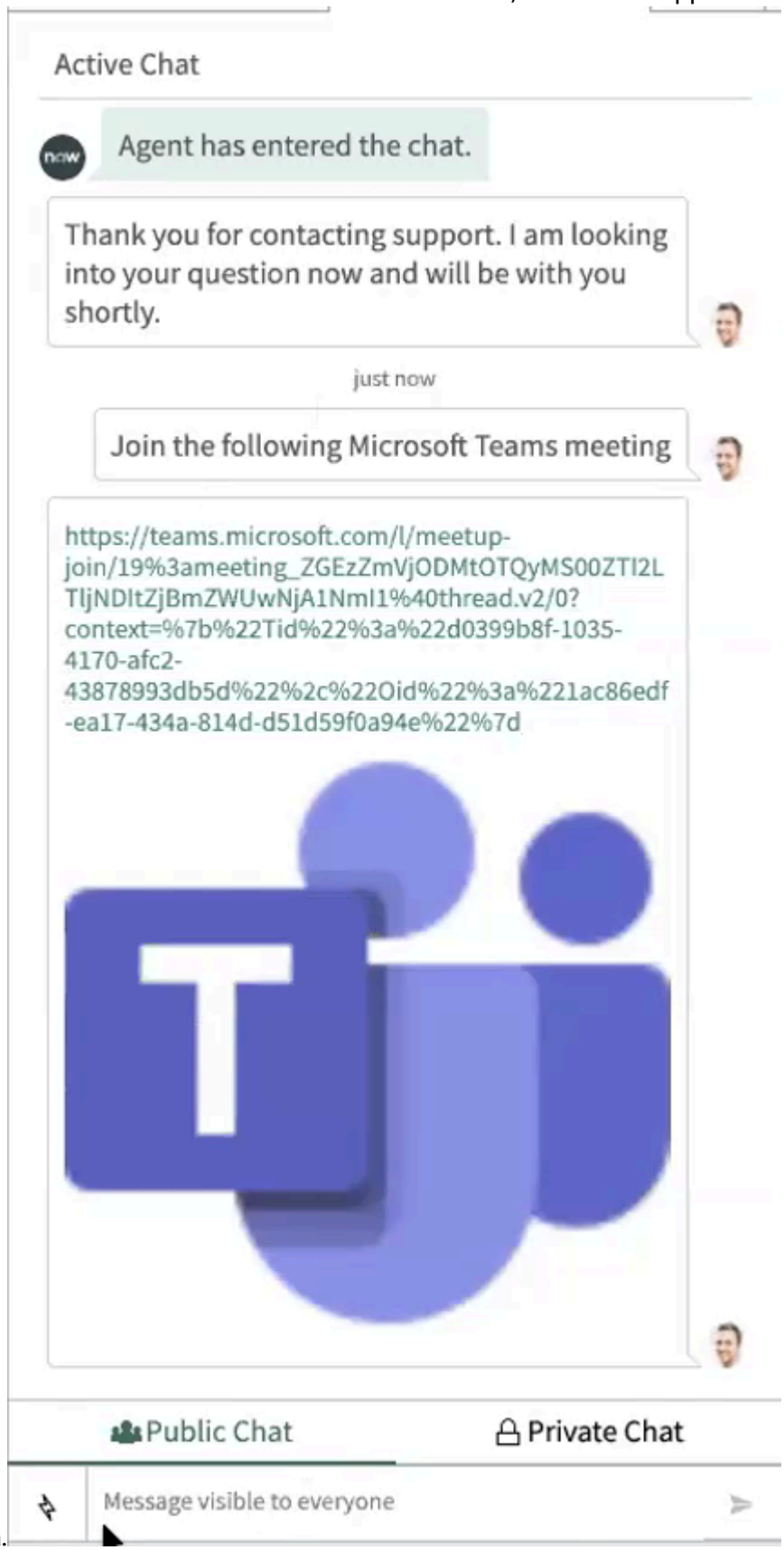
A Microsoft Teams conference call will be initiated, and the link appears in the active chat area.



4. Click the meeting link to join the conference call.

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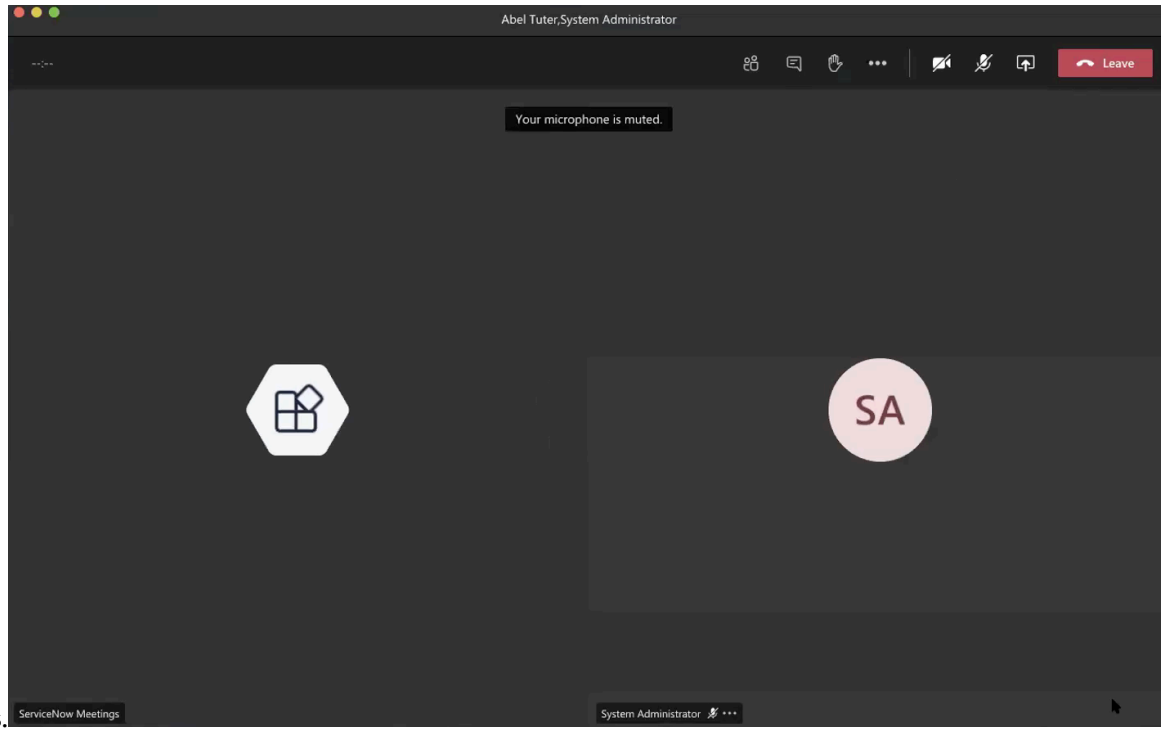
The user receives a call in Microsoft Teams.



The user's can initiate a chat conversation in Microsoft Teams.

5. Click to open the conversation pane.
6. After the conversation ends, click Leave to leave the conference call.
   All the information is logged in the Activity (Work notes). You can view the child interaction, and the chat conversation occurred in Microsoft Teams.

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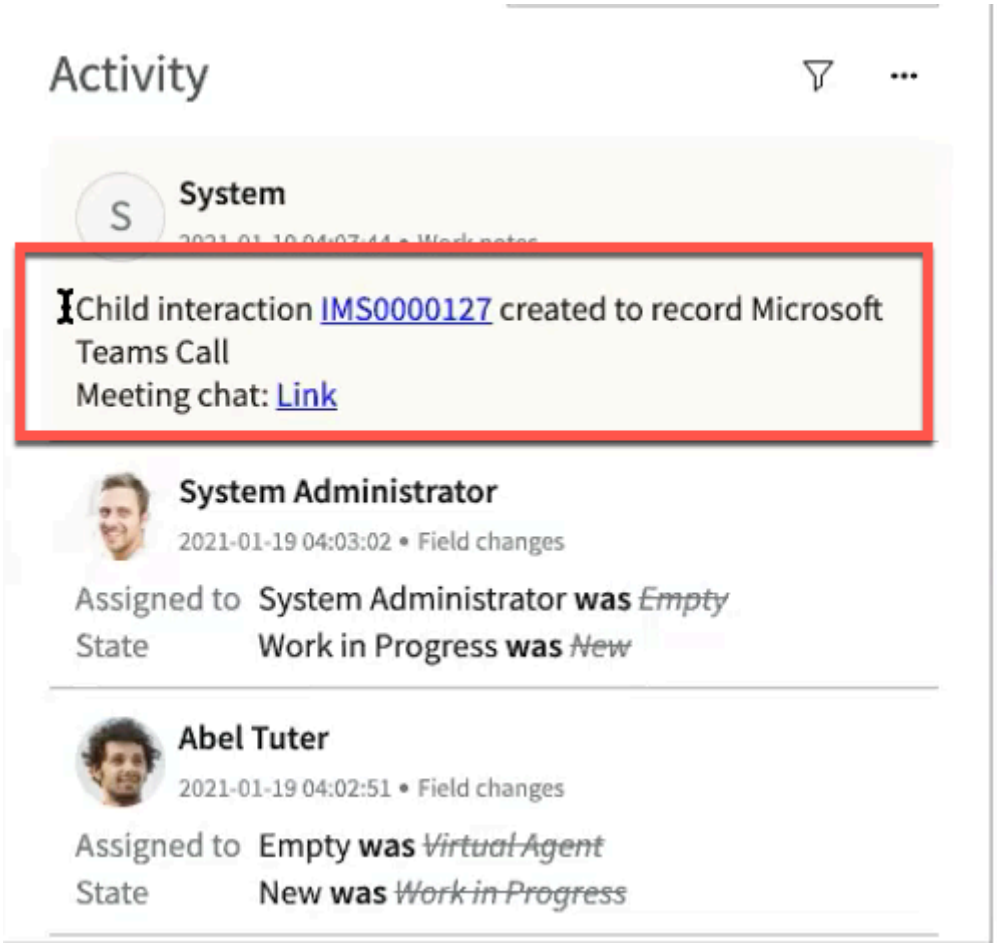
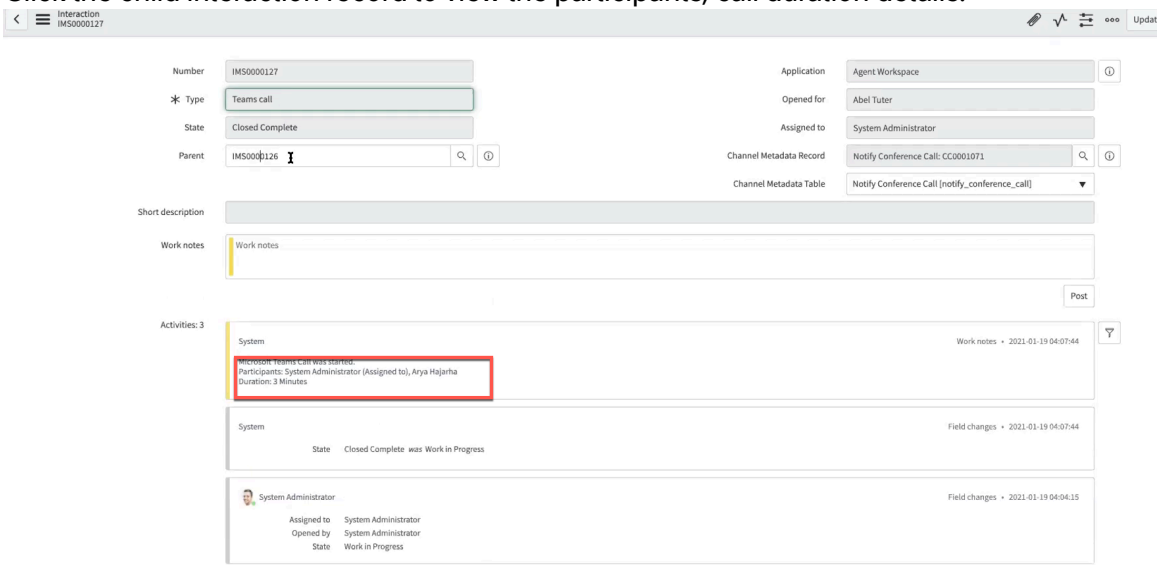


7. Click the child interaction record to view the participants, call duration details.



Click meeting chat link to view the conversation occurred in Microsoft Teams.

Add communication plan from MIM workbench

You can create a new communication plan or add a new communication task to an existing communication plan from the workbench.

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Before you begin

Ensure you have installed the required plugins to be able to use Major Incident Management (MIM) workbench. For more information, see ServiceNow for Microsoft Teams and Microsoft 365.

Role required: major_incident_manager

Procedure

1. Navigate to **All** > **Incident** > **Major Incidents** > **Open**.
2. Open the relevant major incident.
3. Click **View Workbench**.
4. Click **Communications** tab, and then click **Add** that appears in **Communication Tasks** section.
5. On the form, fill the fields.

Create New template form

Field	Description
Communication Plan	List to select a new communication plan or to select an existing plan and add communication tasks to the plan.
Plan Short description	Brief description of what the communication plan is all about.
Task Short description	Brief description of what the communication task is all about.
Channels	Check box to select email, SMS, Microsoft Teams notification, or conference as mode of communication for the plan.
Frequency	Frequency at which a specific task must be executed. A task can be executed only once or on specific durations.
Due in (Minutes)	Time span when the task must be executed after the task initiates. For recurring tasks, it also indicates the time span after which the task must repeat.

6. Click **Next**.
7. In the **Manage Recipients** tab, add the users required to be involved in the major incident communication plan.
8. Click **Save**.

Send a notification from Major incident management workbench

Send a Microsoft Teams notification to the stakeholders associated with a major incident.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Incident** > **Major Incidents** > **Open**.
2. Open the relevant major incident.
3. Select **View Workbench**.
4. Select the **Communicate** tab.
5. In the Communication Tasks form section, select **Add**.
   The communication task appears.

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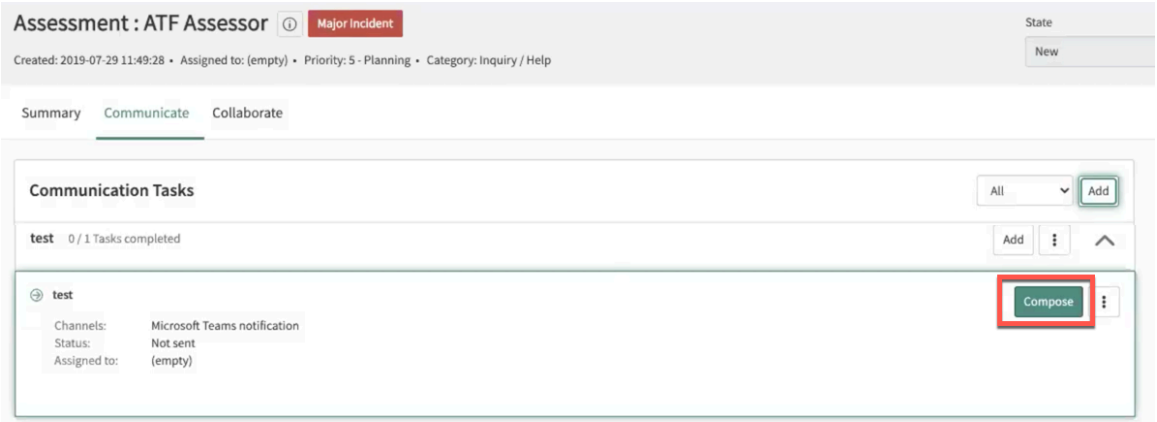
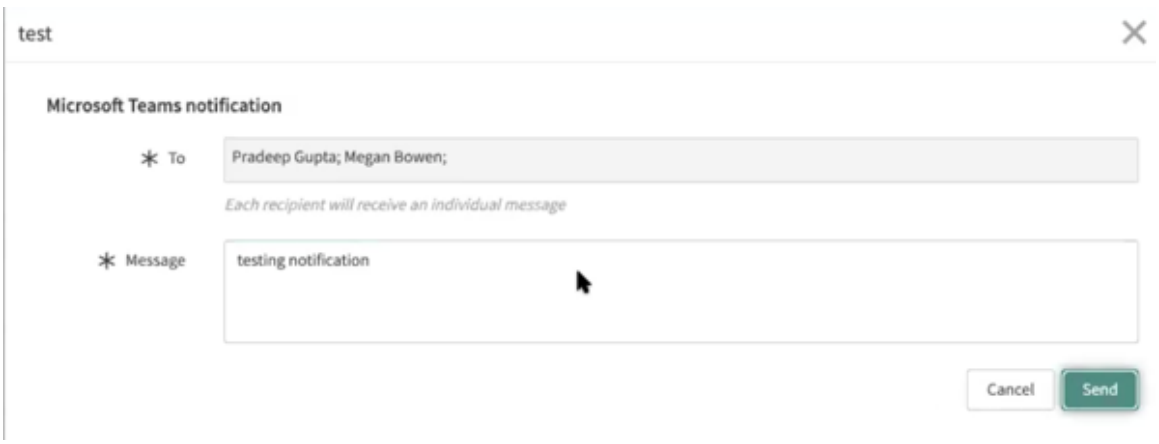
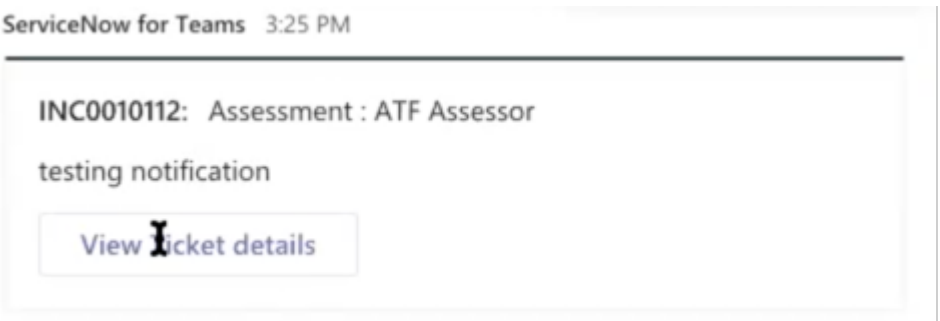


6. Select **Compose**.
7. In the Compose modal screen, enter the details for the notification.
   a. In the **To** field, enter the recipients associated with the communication task.
   b. In the **Message** field, enter the message for the notification.
   c. Select **Send**.



Result
The notification is sent to the recipients in Microsoft Teams. Recipients can select **View ticket details** to view the ticket in the ServiceNow instance.



View notifications for a major incident

View the notifications that are sent during specific events in a major incident. These notifications are sent to all the stakeholders associated with the major incident.

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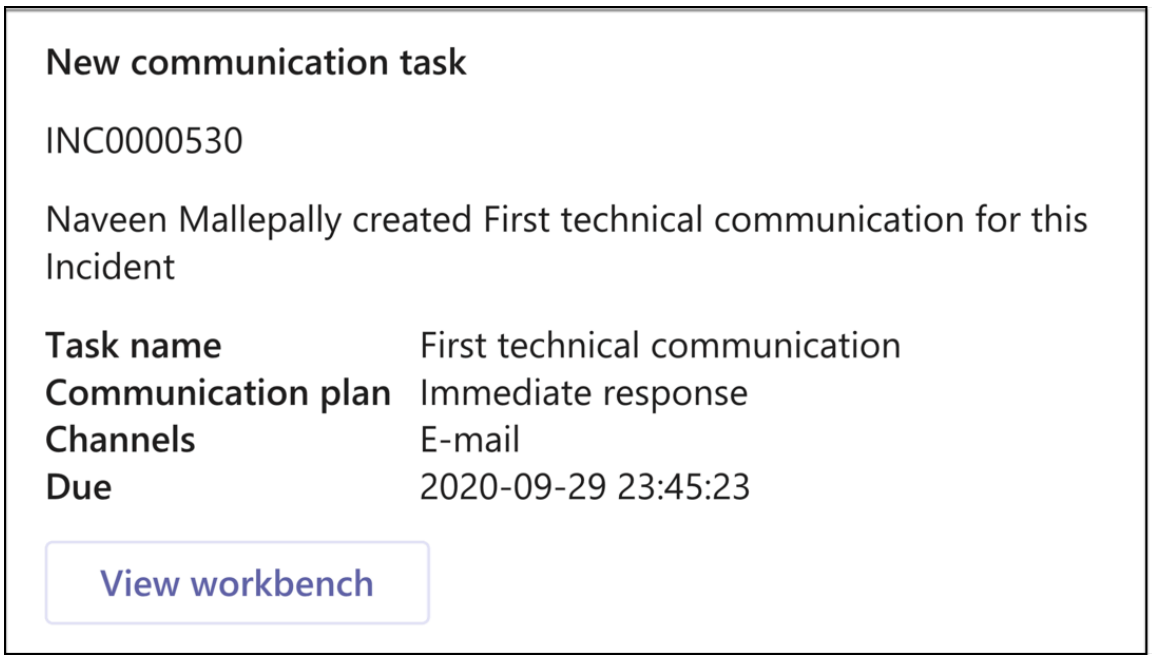
Before you begin
Role required: major_incident_manager, agent

About this task
The following informational notifications are triggered for a major incident when:

- A communication task is created for a major incident
- SLA reaches 75%
- SLA is breached

Procedure
1. Launch **Microsoft Teams** application.
2. Click **Activity**.
3. View the list of notifications feeds for the major incident.
4. Click the notification to view the details.



5. Click **View workbench** to view the ticket details in ServiceNow.

Add collaborative communication task from MIM workbench

You can create a communication plan or add a new communication task to an existing communication plan from the workbench.

Before you begin
Role required: major_incident_manager

Procedure
1. Navigate to **All** > **Incident** > **Major Incidents** > **Open**.
2. Open the relevant major incident.
3. Click **View Workbench**.
4. Click **Collaborate** tab.
5. Click **Add** that appears in **Communication Tasks** section.

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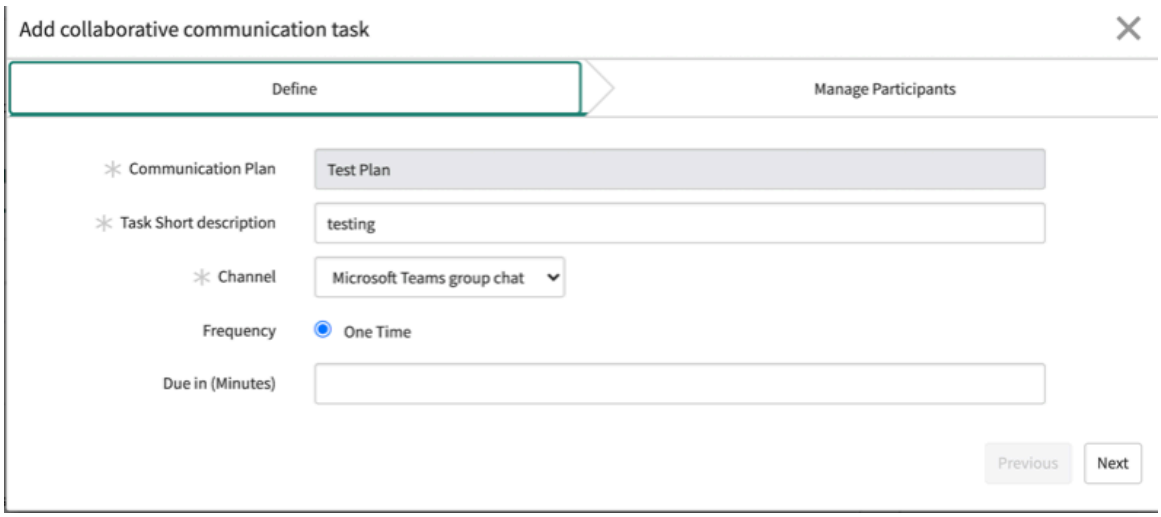
6. On the form, fill the fields.

Communication task form

Field	Description
Communication Plan	List to select a new communication plan or to select an existing plan and add communication tasks to the plan.
Task Short description	Brief description of what the communication task is all about.
Channels	Select Microsoft Teams group chat.
Frequency	Frequency at which a specific task must be executed. A task can be executed only once or on specific durations.
Due in (Minutes)	Time span when the task must be executed after the task initiates. For recurring tasks, it also indicates the time span after which the task must repeat.



7. Click **Next**.
8. In the **Manage Recipients** tab, add the users required to be involved in the major incident communication plan.
9. Click **Add**.

   The task appears in the **Collaborate** tab.

Initiate Microsoft Teams group chat from MIM workbench

You can initiate a Microsoft Teams group chat from the MIM workbench to work towards the resolution of the task.

Before you begin

Role required: major_incident_manager

Procedure

1. Navigate to **All** > **Incident** > **Major Incidents** > **Open**.
2. Open the relevant major incident.
3. Click **View Workbench**.
4. Click **Collaborate** tab.

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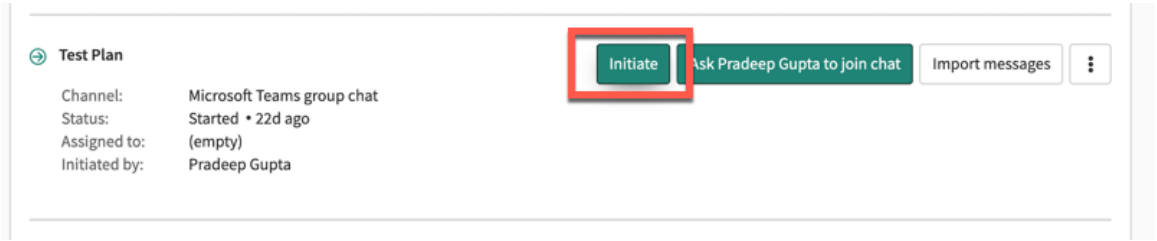
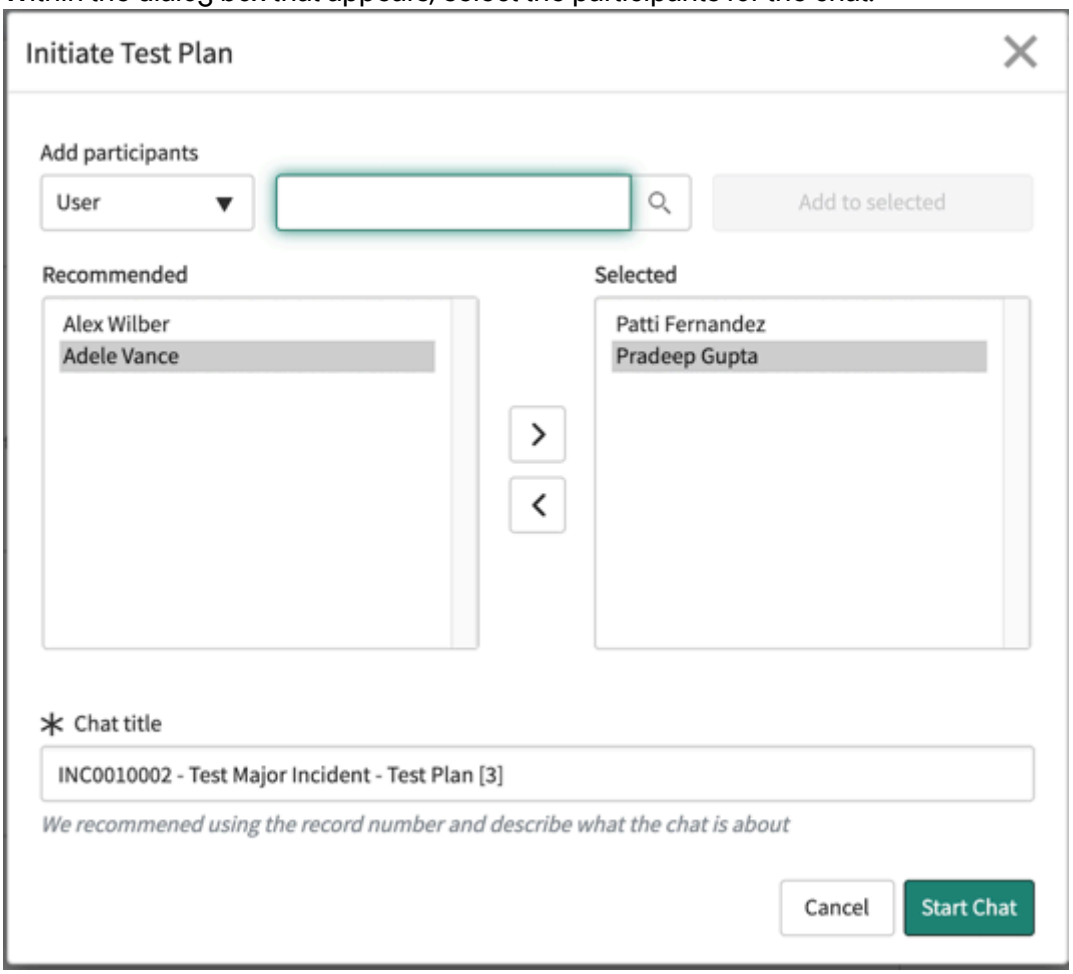
5. Click **Initiate** button.



6. Within the dialog box that appears, select the participants for the chat.



The dialog box displays the **Recommended** and **Selected** participants for the chat.

All users from the assigned group for the ticket are in the recommended section by default. The user who initiates the chat is added to the selected list of participants.

7. Click **Add Participants** list to:
   - **Users**: Enter the name of the user to include in the chat.
   - **Group**: Enter the group of users to be included in the chat.

     If the On-Call Scheduling (com.snc.on_call_rotation) plugin is activated, the On-Call Scheduling users will be added when you select a group. On-Call Scheduling (com.snc.on_call_rotation) plugin isn't activated, it adds all users from the selected group.

   - **Email**: Enter a valid email of the participant to be included in the chat.
8. Click **Add to selected**.

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The **Chat Title** appears only if there are more than two participants in the chat.

9. Click **Start Chat**.

Result

The Microsoft Teams application opens the tab where the agent can chat with all the selected participants.

Use Microsoft Teams for Universal Request

Agents and employees can collaborate using the Microsoft Teams application to resolve universal requests effectively. Employees can create and modify universal requests using Microsoft Teams.

Employee actions

Employees can create and update universal requests and track existing universal requests by using Microsoft Teams.

Create a Universal request from Microsoft Teams

Create a universal request with the help of the Virtual Agent. You can access the Virtual Agent from the Microsoft Teams application.

Before you begin

Role required: none

Procedure

1. Launch the Microsoft Teams application.
2. Open the **Now Virtual Agent** chat window.
3. Enter your query in the chat window.
   The Virtual Agent prompts you to select the type of help that you need.
4. Select **Employee help request (Teams template)**.
5. Summarize your issue.
6. Confirm if the request contains any sensitive information.

Result

A universal request is created for the issue.

Update or cancel a universal request using Microsoft Teams

Update or cancel a universal request with the help of the Virtual Agent. You can access the Virtual Agent from the Microsoft Teams application.

Before you begin

Role required: none

Procedure

1. Launch the Microsoft Teams application.
2. Open the **ServiceNow for Teams** chat window.
3. Launch the Microsoft Teams application.
4. Open the **Now Virtual Agent** chat window.
5. Enter your query in the chat window.
   The Virtual Agent prompts you to select the type of help required.

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6. Select **Track Universal Request Status (Template)**.
7. Select the universal request that you want to track.
8. Select the appropriate responses to complete your request.
   For a sample Virtual Agent conversation, see Universal Request Virtual Agent conversation flows.

Agent actions

Work on the universal requests created by the employees. You can chat with employees, and import messages from the records or from the Agent Workspace.

Manage chat messages from a record

As an agent, interact with a requester in Microsoft Teams for issues related to universal requests assigned to you. Import the chat back to your instance.

Initiate chat with an employee from a record

As an agent, initiate chats with the requester or an employee from the watchlist of a universal request using Microsoft Teams.

Before you begin

The **Start Microsoft Teams Chat** button is available only if the following conditions are met:

- At least one of the users marked in the universal request has Universal Request integration with Microsoft Teams enabled.
- The universal request is not associated with a primary ticket.

Role required: agent

Procedure

1. Navigate to **Universal Request** > **All**.
2. Open the universal request you want to work on.
3. Select **Start Microsoft Teams Chat**.
4. Select the employee who you want to chat with.
   You can select the requester, or any other employee added to the watchlist. You can also select multiple employees.
5. Select **Start Chat**.

Result

The Microsoft Teams application opens the tab where you can chat with the selected employee.

Import messages from a universal request

As an agent, import a conversation with a requester from Microsoft Teams. Append the conversation in the activity stream of the record to store all the important messages in the ServiceNow instance.

Before you begin

Role required: agent

About this task

Importing messages helps you to view the history of the ticket. The requester can see all discussions about their ticket in one place. Importing helps to capture the information required for post-ticket review and continuous improvement processes.

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Procedure

1. Navigate to **Universal Request** > **All**.
2. Open the universal request that you want to work on.
3. In the **Related Links** section, select **Import messages from Microsoft Teams**.
   You receive a prompt to log in to Microsoft Teams if you are not logged in.
4. Click **Accept**.
5. On the form, fill in the fields.

Import messages from Microsoft Teams form

Field	Description
Show conversations	Option to show conversations. Choices are as follows: ○ **Started from this record**: Lists all the communication tasks created for the record. ○ **List all conversations**: Lists all conversations by the logged-in agent.
Select a conversation	Conversation whose messages are imported for the record.
Import messages as	Option to import messages into the record. Choices are as follows: ○ **Additional comments**: The messages will be appended under the Additional comments. ○ **Work notes**: The messages will be appended under the Work notes.

6. Select the messages, files, and images that you would like to import.
7. Click **Import messages**.

Manage chat messages from the Agent Workspace

As an agent, interact with a requester in Microsoft Teams from the Agent Workspace for issues related to an universal request. Import the chat back to ServiceNow.

Initiate chat with an employee from Agent Workspace

Chat with an employee from Agent Workspace through Microsoft Teams so that you can collaborate and resolve universal requests.

Before you begin

The **Start Microsoft Teams Chat** button is available only if the following conditions are met:

- At least one of the users marked in the universal request has Universal Request integration with Microsoft Teams enabled.
- The universal request is not associated with a primary ticket.

Role required: agent

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, select **Universal Request** > **All**.

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3. Open the universal request that you want to work on.
4. Select **Start Microsoft Teams Chat**.
5. Select the recommended participants or add the email address of external participants.
   You can select the requester, or any other employee added to the watchlist. You can also select multiple employees.
6. Select **Start Chat**.

Result
The Microsoft Teams application opens the tab where you can chat with the selected employee.

Import messages from Agent Workspace

As an agent, import a conversation with a user from Microsoft Teams. Append the conversation in the activity stream of the record in the Agent Workspace. Store all important messages related to a universal request in the ServiceNow instance.

Before you begin
Role required: agent

Procedure
1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, select **Universal Request** > **All**.
3. Open the universal request you want to work on.
4. Select **Import Messages**.
   You receive a prompt to log in to Microsoft Teams if you are not logged in.
5. Click **Accept**.
6. On the form, fill in the fields.

Import messages from Microsoft Teams form

Field	Description
Show conversations	Option to show conversations. Choices are as follows: ○ **Started from this record**: Lists all the communication tasks created for the record. ○ **List all conversations**: Lists all conversations by the logged-in agent.
Select a conversation	Conversation whose messages are imported for the record.
Import messages as	Option to import messages into the record. Choices are as follows: ○ **Additional comments**: The messages will be appended under Additional comments. ○ **Work notes**: The messages will be appended under Work notes.

7. Select the messages, files, and images that you would like to import.
8. Click **Import messages**.

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Use Microsoft Teams integration for Agent Experience

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams.

Use Notify connector for Microsoft Teams

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Notify connector for Microsoft Teams.

Use Notify connector for Microsoft Teams with task records

Notify connector for Microsoft Teams enables you to initiate conference calls from task records such as incidents, problems, or change requests.

Start and manage a conference call from a task record

Make a conference call from a task record such as an incident, problem record, or change request in Microsoft Teams.

Before you begin

Role required: itil, notify_view

Procedure

1. Navigate to any task record, such as an incident, problem, or change request.
2. Click the **Start conference call** related link.
3. In the dialog box, select the participants for the conference.

   All users from the User Contacts list in the task record are in the recommended section by default. The user who initiates the conference call is added to the selected list of participants.
4. After you finalize the participant list, click **Start**.

   A notification is sent to all the users in Microsoft Teams that a call has been initiated. Each user can accept the call to join the conference call.

   The host can view the users who have answered the call in Microsoft Teams.
5. Do one of the following activities.

Option	Action
Add participants	Click the **Manage Conference Calls** related link, and select **Add Participants**.
End the conference call	Click the **Manage Conference Calls** related link, and selecting **End Conference Call**

Use Notify connector for Microsoft Teams with Incident Communication Management

Use Notify with an incident communication plan to start conference calls.

The property **com.snc.iam.enable_notify** must be enabled in Notify Properties to make calls from major incident record.

1. Navigate to **Notify** > **Administration** > **Notify Properties**.
2. Check the option **Enable Notify integration for Incident Communications Management. Entering phone number in 'com.snc.iam.notify_number' property is equivalent to setting this to true** (com.snc.iam.enable_notify).

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Right-click on the "Enable Notify integration for Incident Communications Management. Entering phone number in 'com.snc.iam.notify_number' property is equivalent to setting this to true" text and click **Edit Property** to view the property details.

3. Click **Save**.

Start a conference call from an incident communication plan

Initiate a conference call in Microsoft Teams from an incident communication plan so you can discuss the resolution of an incident.

Before you begin
Role required: incident_communication_manager

Procedure

1. Navigate to **All** > **Incident Communications Management** > **Open**.
2. Open the relevant incident communication plan.
3. Click the **Initiate Conference Call** related link.
4. In the dialog box, select the participants for the conference.
5. After you finalize the participant list, click **Start Call**.

Result
A notification is sent to all the selected users in Microsoft Teams that a call is initiated. Each user can accept the call to join the conference call.

As the host, you can view the users who have answered the call.

Add participants to a conference call from the incident communication plan

Add a participant to a conference call on a task record from the incident communication plan.

Before you begin
Role required: ia_admin, or admin

Procedure

1. Navigate to **Incident Communications Management** > **All**.
2. Open the relevant incident communication plan.
3. Click the **Conference** tab.
4. Click (+) Participants under **Active Participants**.
5. In the dialog box, select the participants you want to add to the conference call.
6. Click **Add Participants**.

Result
A notification is sent to all the selected users in Microsoft Teams that a call is initiated. Each user can accept the call to join the conference call.

As the host, you can view the users who have answered the call.

Mute a participant in a conference call

Mute a participant in a conference call to avoid unnecessary background disruption.

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Before you begin
This procedure assumes that there is an active conference call with one or more participants.

Role required: ia_admin, or admin

Procedure
1. Navigate to **Incident Communications Management** > **All**.
2. Open the relevant incident communication plan.
3. Click the **Conference** tab.
4. Click **Mute** next to the participant name you want to mute.

End a conference call made through an incident record

As a host or a user with the incident communication manager role, you can end the conference call.

Before you begin
Role required: ia_admin or admin

Procedure
1. Navigate to **Incident Communications Management** > **All**.
2. Open the relevant incident communication plan.
3. Click the **Conference** tab.
4. Click **End Conference Call**.

Result
When you end a call, only the host (bot) exits the call. The other participants still stay in the call until they manually disconnect. After the host (bot) exits the call, call details are no longer logged.

Use Notify connector for Microsoft Teams with a major incident

Initiate a conference call from the major incident workbench by inviting one or more users to join a call. The conference doesn't start until at least two participants join.

Notify administrators, major incident managers, or communications managers can manage conference calls.

Conference call records are stored in the Notify Conference Calls [notify_conference_call] table. Conference call participant records are stored in the Notify Conference Call Participants [notify_participant] table.

Initiate a conference call

As a participant in a major incident ticket, you can create a conference call from the record.

Before you begin
Role required: notify_admin, major_incident_manager, or communication_manager

Procedure
1. Navigate to **All** > **Incident** > **Major incidents** > **Open**.
2. Open the relevant major incident.
3. Click **View Workbench**.

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4. Click the **Collaborate** tab.
5. Select the participants for the conference.
6. After you finalize the participant list, click **Start Call**.

Result

A notification is sent to all the users in Microsoft Teams that a call is initiated. Each user can accept the call to join the conference call.

As the host, you can view the users who have answered the call.

Join a conference call

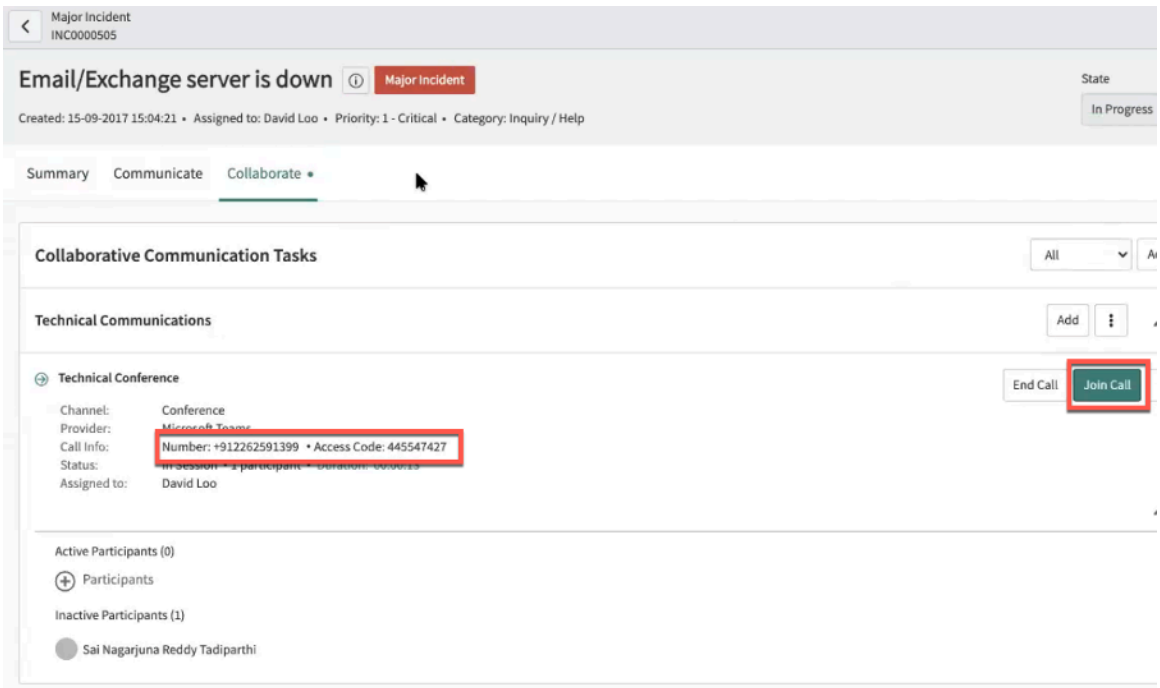
After a conference call is initiated, as a logged-in user with the major incident manager role, you can join the conference call.

Before you begin

Role required: notify_admin, major_incident_manager, or communication_manager

Procedure

1. Navigate to **All** > **Incident** > **Major incidents** > **Open**.
2. Open the relevant major incident.
3. Click the **Collaborate** tab.
4. Do one of the following.
   - Join via phone number: Dial in the conference bridge number along with the access code shown in the workbench from your mobile.
   - Join Call: Click the **Join Call** to join the ongoing conference call.



Add participants to a conference call

Add a participant to a conference call to participate in the discussion to resolve the major incident.

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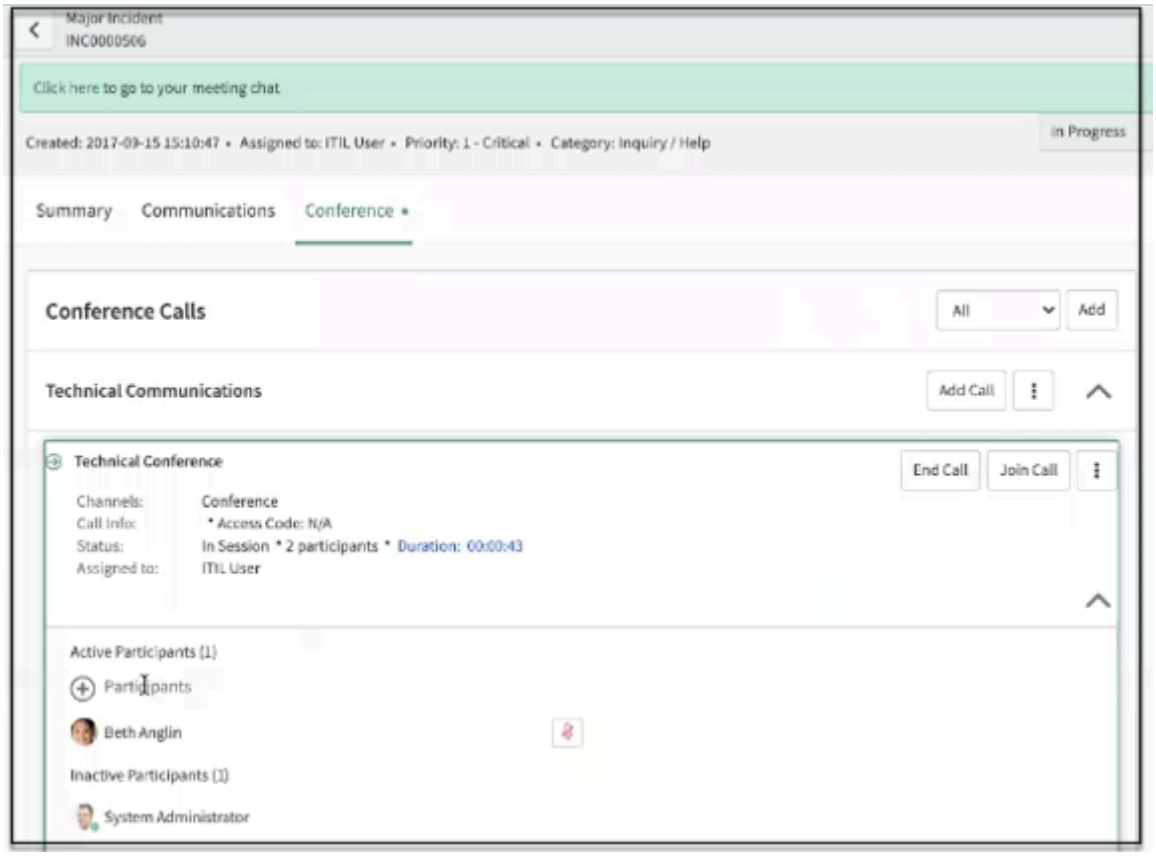
Before you begin
Role required: notify_admin, major_incident_manager, or communication_manager

Procedure
1. Navigate to **All** > **Incident** > **Major incidents** > **Open**.
2. Open the relevant major incident.
3. Click the **Collaborate** tab.
4. Click (+) Participants under **Active Participants**.



5. In the dialog box that appears, select the participants for the conference.
6. Click **Add Participants**.

Result
A notification is sent to all the users in Microsoft Teams that a call is initiated. Each user can accept the call to join the conference call.

As the host, you can view the users who have answered the call.

Mute participants from a major incident conference call

Mute a participant from the conference call to avoid unnecessary background disruption.

Before you begin
Before starting this procedure, ensure that there is an active conference call with one or more participants.

Role required: notify_admin, major_incident_manager, or communications_manager

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Procedure

1. Navigate to **All** > **Incident** > **Major incidents** > **Open**.
2. Open the relevant major incident.
3. Click the **Collaborate** tab.
4. Click **Mute** next to the participant name you want to mute.

End a conference call from a major incident

As a host or participant with the major incident manager role, you can end the conference call.

Before you begin

Role required: notify_admin, major_incident_manager

Procedure

1. Navigate to **All** > **Incident** > **Major incidents** > **Open**.
2. Open the relevant major incident.
3. Click the **Collaborate** tab.
4. Click **End Call**.

Result

When you end a call from ServiceNow, only the host (bot) exits the call. The other participants still stay in the call until they manually disconnect. The call details are no longer logged after the host (bot) exits the call.

Manage calls in Microsoft Teams

Manage conference calls in Microsoft Teams by muting or unmuting participants, or ending the call.

Mute participants from Microsoft Teams

As a manager or a conference call host, you can mute conference participants to avoid distraction.

Before you begin

Ensure that there is an active conference call with one or more participants.

Role required: notify_admin, major_incident_manager, communications_manager, itil_admin

Procedure

1. Open the active conference call in Microsoft Teams.
2. Click the participants icon () in the toolbar.
3. Mute an individual participant or mute all participants.

Option	Action
Mute an individual participant	**a.** Select the participant name. **b.** Click **Mute**.
Mute all participants	Click the **Mute all** button that appears on the top of the participant list.

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End a call from Microsoft Teams

As the host or a user with the manager role, you can end a conference call after the discussion ends.

Before you begin

Role required: notify_admin, major_incident_manager, communications_manager, or itil_admin

Procedure

1. Open the active conference call in Microsoft Teams.
2. Click more options icon () in the toolbar.
3. Click **End meeting**.
4. Click **Confirm** in the dialog box.

Result

All users are terminated from the conference call.

Use Microsoft Teams Meeting Extensions

Allow the agents to work and manage the major incidents from Major Incident Management (MIM) workbench through Microsoft Teams Meeting Extensions.

Manage calls using Meeting Extensions

Use Meeting Extensions to start conference calls to discuss about the resolution for a major incident record.

Before you begin

Role required: itil, itil_admin, or admin

Procedure

1. Navigate to **All** > **Incident** > **Major incidents** > **Open**.
2. Open the relevant major incident.
3. Click **View Workbench**.
4. Click **Collaborate** tab.
5. Click **Add** that appears in **Communication Tasks** section.
6. On the form, fill the fields.

Communication task form

Field	Description
Communication Plan	List to select a new communication plan or to select an existing plan and add communication tasks to the plan.
Task Short description	Brief description of what the communication task is all about.
Channels	Select Microsoft Teams group chat.
Frequency	Frequency at which a specific task must be executed. A task can be executed only once or on specific durations.
Due in (Minutes)	Time span when the task must be executed after the task initiates. For recurring tasks, it also indicates the time span after which the task must repeat.

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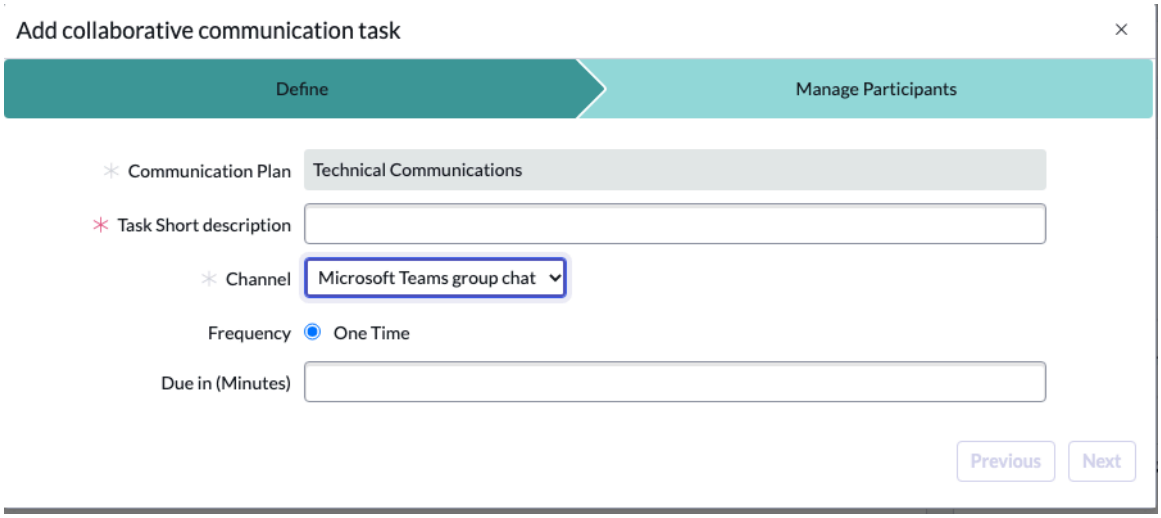

7. Click **Next**.
8. In the **Manage Recipients** tab, add the users required to be involved in the major incident communication plan.
9. Click **Add**.

   The task appears in the **Collaborate** tab.
10. Click **Initiate** button.
11. Within the dialog box that appears, select the participants for the chat.

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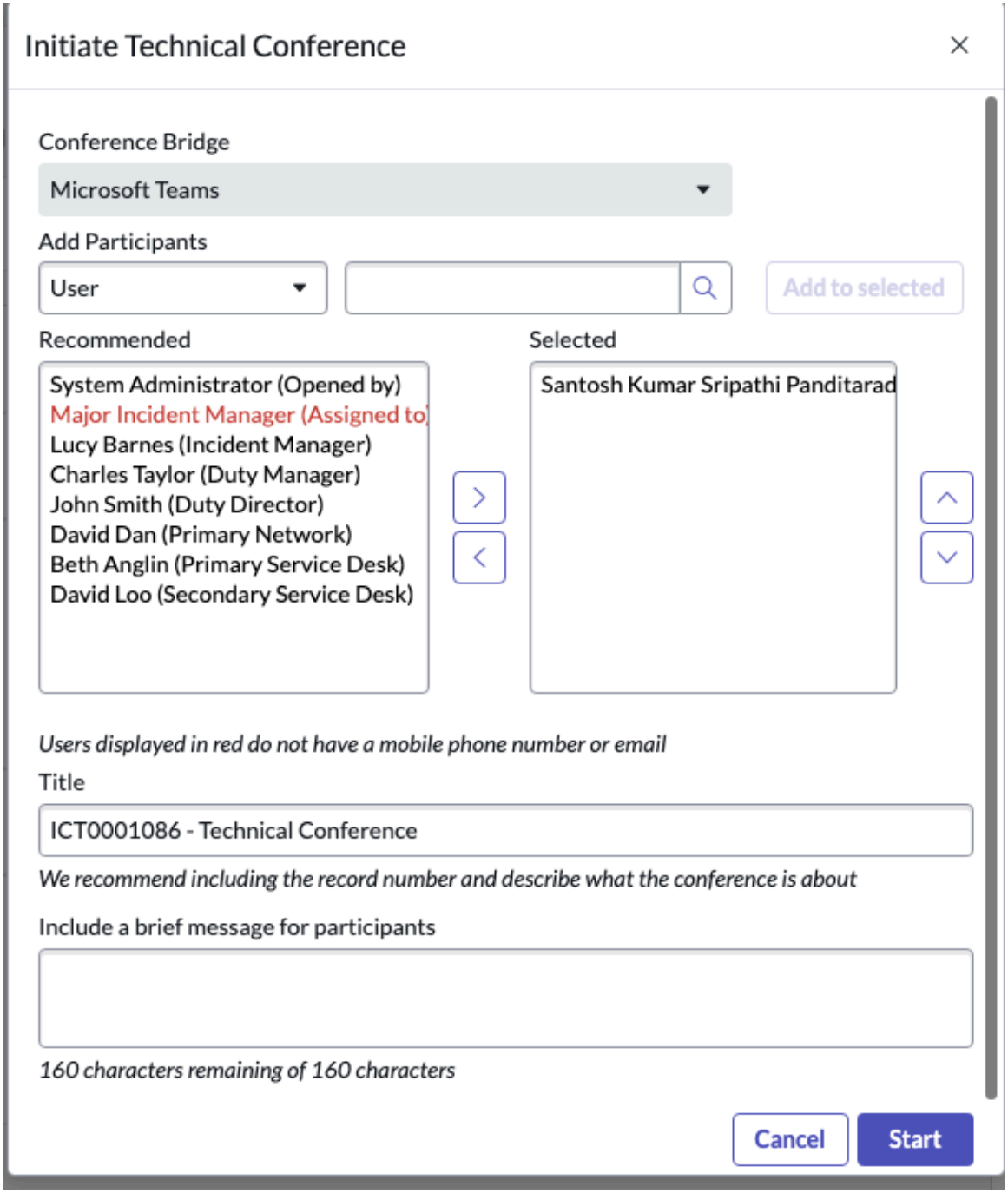

The dialog box displays the **Recommended** and **Selected** participants for the chat.

All users from the assigned group for the ticket are in the recommended section by default. The user who initiates the chat is added to the selected list of participants.

12. Click **Add Participants** list to:
    - **Users**: Enter the name of the user to include in the chat.
    - **Group**: Enter the group of users to be included in the chat.

      If the On-Call Scheduling (com.snc.on_call_rotation) plugin is activated, the On-Call Scheduling users are added when you select a group. On-Call Scheduling (com.snc.on_call_rotation) plugin isn't activated, it adds all users from the selected group.

    - **Email**: Enter a valid email of the participant to be included in the chat.

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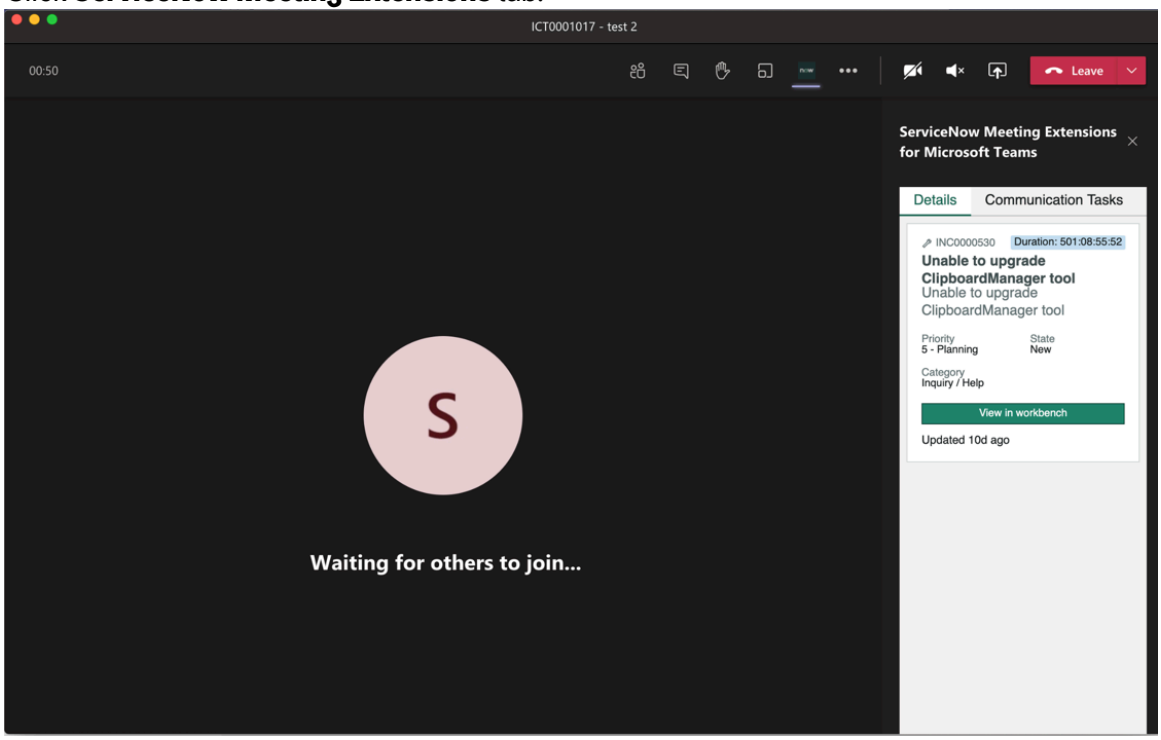
13. Click **Add to selected**.
    The **Chat Title** appears only if there are more than two participants in the chat.
14. Click **Start**.

    The Microsoft Teams application opens the tab where the agent can chat with all the selected participants.

15. Click  to toggle between show and hide conversation.
16. Click **ServiceNow Meeting Extensions** tab.



- **Details** tab: Displays the details of the major incident. Click **View in workbench** to open the major incident in ServiceNow.
- **Communication Tasks** tab: Displays the communication tasks of this major incident.

17. Click **Communication Tasks** tab.

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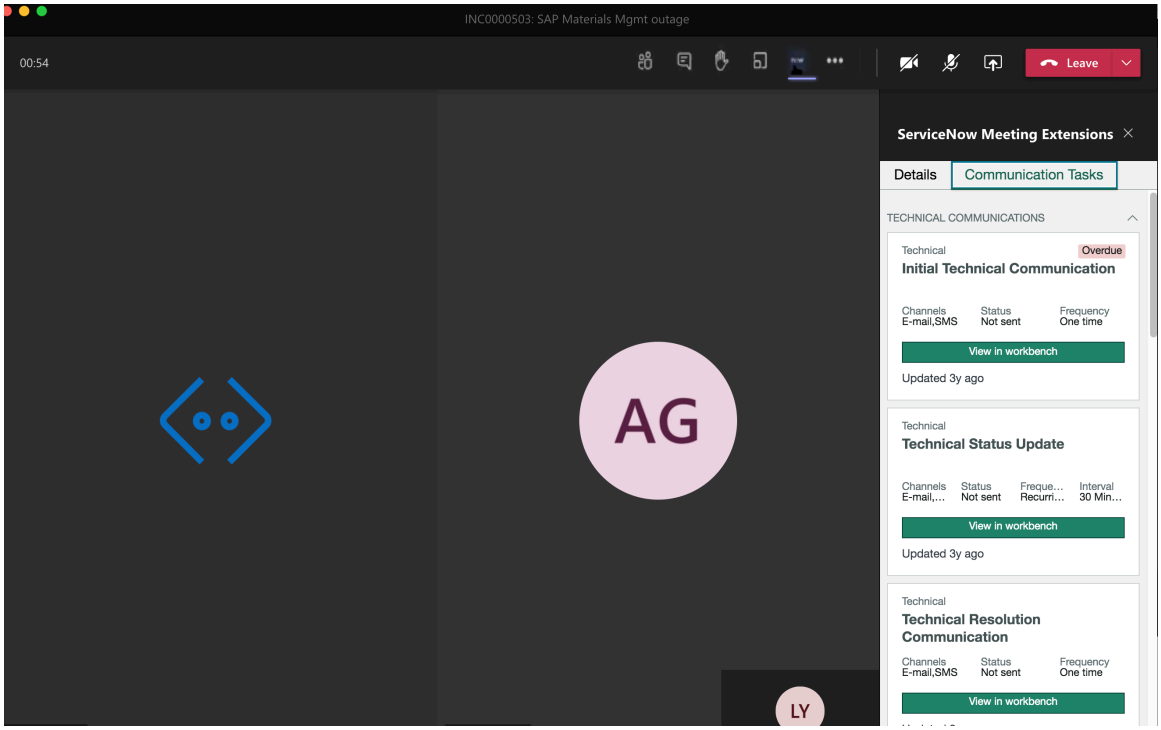

- The information in the **Details**tab, and the **Communication Tasks** tab is automatically updated during the meeting whenever the major incident is updated from ServiceNow.
- The timer color in Microsoft Teams changes when the remaining time goes past 75% of the stipulated time.

18. To move the major incident to resolved state, open the major incident in the major incident workbench, and click **Resolve**.

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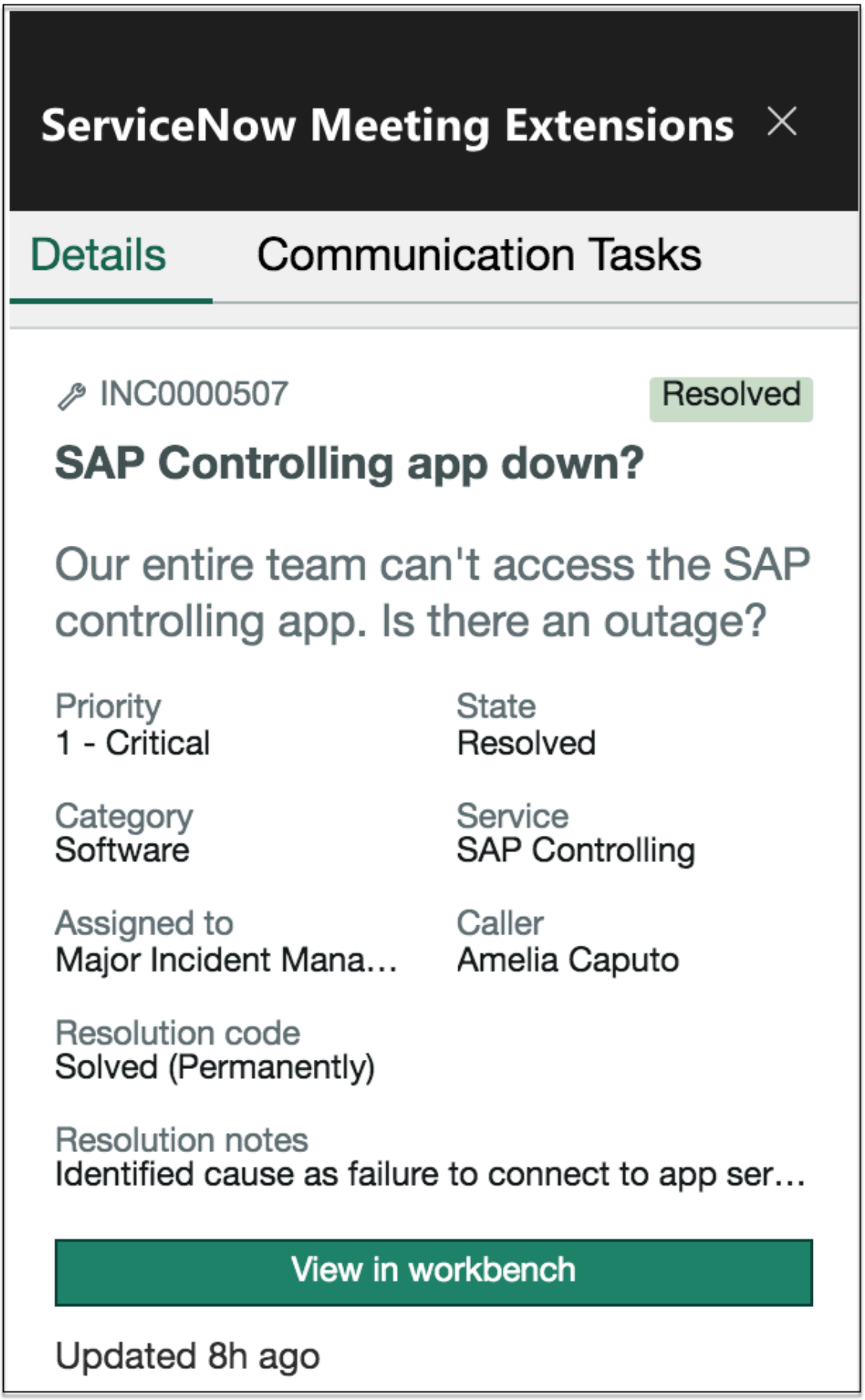

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The state is updated in the Microsoft Teams meeting.

ServiceNow for Microsoft Teams reference

Reference topics provide additional information about the ServiceNow for Microsoft Teams application integration.

Properties installed with Microsoft Integrations Core

The following properties are installed with the Microsoft Integrations Core plugin.

Note: The following properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Microsoft Integrations Core

Property	Description
sn_now_teams.st_activity_oauth_profile	Sys_id of the OAuth profile used for single tenant setup. • Type: string • Default value: none
sn_now_teams.link_unfurl.view_action_choice	When the link unfurls in Microsoft Teams, provide an option to open URLs for the portal configured within the Teams tab in the app or in a browser. The options are displayed when a user selects the **View** action on the card. • Type: true|false • Default value: true
sn_now_teams.actionable_notification_approve_or_reject_reason_mandatory	Use this property to set the approval note or the reject reason

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Properties for Microsoft Integrations Core (continued)

Property	Description
	as mandatory for actionable notifications sent in Microsoft Teams. • Type: true|false • Default value: false
sn_now_teams.portal.suffix	Use this property to set the portal to be embedded in Microsoft Teams when a user goes to **Your Hub** or **Employee Center**. You must enter the URL suffix of the portal that you want to use. • Type: string • Default value: none

Properties installed with IT Service Management for Microsoft 365

The following properties are installed with the IT Service Management for Microsoft 365 plugin.

Note: The following properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for IT Service Management for Microsoft 365

Property	Description
sn_now_teams_it.enable_va_comment_notification	Use this property to enable the comment notifications sent by the Virtual Agent sys_notification. • Type: true|false • Default value: true

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Properties for IT Service Management for Microsoft 365 (continued)

Property	Description
sn_now_teams.enable_va_approval_notification	Use this property to enable the approval notifications sent by the Virtual Agent sys_notification. • Type: true|false • Default value: true

Properties installed with HR Service Delivery for Microsoft 365

The following properties are installed with the HR Service Delivery for Microsoft 365 plugin.

Note: The following properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for HR Service Delivery for Microsoft 365

Property	Description
sn_now_teams_hr.enable_va_comment_notification	Use this property to enable the com • Type: true|false • Default value: true
sn_now_teams_hr.hr_case_allow_list_for_teams_chat_actions	List of HR Case tables for which the • Type: string • Default value: sn_hr_core_case,sr
sn_now_teams_hr.chat_sn_hr_core_task_fields	List of HR Task table fields that are c • Type: string • Default value: assigned_to
sn_now_teams_hr.respond_to_comment_notification_inclusion_list_for_hr	List of HR Case tables for which the • Type: string • Default value: sn_hr_core_case,sn_hr_core_cas
sn_now_teams_hr.chat_sn_hr_core_case_fields	List of HR Case table fields that are • Type: string • Default value: opened_for,subject

ServiceNow for Microsoft Teams integration API permissions for Request-based chat and SSO

Following are API permissions requested by the ServiceNow® integration with Microsoft Teams for Request-based chat and SSO.

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API Permissions for Request-based chat and SSO

App	API Permission	Description
Request-Based Chat	Offline_access (delegated) (Application)	ServiceNow® stores an access token for each user, which allows them to re-authenticate with ServiceNow, within Microsoft Teams, without having to go through a login prompt. Offline access allows us to automatically refresh the access token.
	Chat.ReadWrite (delegated)	The Read part of the Chat.ReadWrite permission allows us to import request-based chats from Microsoft Teams. The Write part of the Chat.ReadWrite permission is used in the “Start Chat” screen, where an opening message is provided on behalf of the agent.
	User.Read (delegated)	This permission is automatically added whenever an app is created to read the basic information of the user like name, email-id.
	User.ReadBasic.All (delegated)	This permission is required to obtain the names and Microsoft Azure IDs of users. ServiceNow stores the Azure ID in order to create chats on behalf of users and import chats on their behalf.
	Files.Read.All (delegated)	This permission is used when importing request-based chats from Microsoft Teams. It allows attachments to be imported, as part of the Microsoft Teams chat.
	ChatMember.ReadWrite (delegated)	When a request with a Teams chat is set to inactive, participants are automatically removed from the corresponding chat. This permission is required to remove the chat participants.
	Chat.Create (delegated)	Permission used in the creation of reauthenticatequest-based chats.
	Chat.ReadBasic (delegated)	This permission is used when importing request-based chats. It allows us to display which participant sent each message in the chat.
	Presence.Read.All (Delegated)	This permission is used when starting a Microsoft Teams chat to get informed of the presence of each user who will be added to the chat. This allows users to know real time status of chat participants before adding them to the group chat.
	User.Read.All (Application)	This permission is used in Guest access feature, where a guest member can also start a chat. Microsoft does not allow a Guest Token (with delegated permission) to access the '/users' API end point. So, the Application permission is needed to fetch details of Microsoft Azure users and map the UPN with ServiceNow users.
Tab SSO	User.Read (delegated)	This permission enables the user to authenticate into a ServiceNow Portal embedded in Microsoft Teams.
	Offline_access (delegated)	This permission is required for the use of Tab SSO, to enable user authentication with a Microsoft Teams tab.
	openid (delegated)	This permission is required for accessing the ID tokens.

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API Permissions for Request-based chat and SSO (continued)

App	API Permission	Description
	email (delegated)	This permission is required to add the user's primary email address to the ID token.
	TeamsActivity.Send (delegated)	This permission is required to send a team work activity to user.
	profile (delegated)	This permission is required for giving the basic user details.

ServiceNow for Microsoft Teams integration API permissions for Notify connector and Meeting Extensions

Following are API permissions requested by the ServiceNow® integration with Microsoft Teams for Notify connector and Meeting Extensions.

API Permissions for Notify connector and Meeting Extensions

App	API Permission	Description
Notify connector for Microsoft Teams	Users.Read.All (Application)	Allows the app to get the details of the users, such as their Azure ID, which is required to start the meeting.
	OnlineMeetings.ReadWrite.All (Application)	Permission required to initiate an online meeting.
	Calls.InitiateGroupCall.All (Application)	Permission required to invite multiple participants to a call on behalf of a Bot.
	Calls.JoinGroupCall.All (Application)	Permission allows the bot to join the meeting as a participant. In order to read call details, the bot must first be a meeting participant.
	Calls.JoinGroupCallAsGuest.All (Application)	Allows the app to anonymously join group calls and scheduled meetings in your organization, without a signed-in user. The app will be joined as a guest to meetings in your tenant.
Meeting Extensions	TeamsAppInstallation.ReadWriteForChat.All (Application)	Permission required to add our app to an online meeting, as part of Meeting Extensibility.
	TeamsTab.ReadWriteForChat.All (Application)	Permission allows the app to open a tab with incident details within a meeting as part of Meeting Extensibility.

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ServiceNow for Zoom

The ServiceNow® integrations with Zoom helps you create a better, more connected experience for users. Employees get seamless self-service without having to leave the Zoom client, and agents can resolve cases faster using Zoom chat, video, and telephony tools.

Key features

ServiceNow for Zoom includes the following integrations for various use cases.

ServiceNow for Zoom integrations

Objective	Requirements	Capabilities
Use ServiceNow Virtual Agent with#Zoom Team Chat	• IT Service Management Pro and above • HR Service Delivery Pro and above To implement ServiceNow Virtual Agent with Zoom, see Using the Now Virtual Agent app.	• Enabling ServiceNow Virtual Agent on Zoom provides access to all Virtual Agent capabilities directly via Zoom Team Chat. • Supports Virtual Agent features such as designer controls for creating conversations, sending notifications, and providing AI Search results. • Enables employees to view and act on actionable notifications.
Enhance employee experience by integrating Employee Center with the Zoom application	Available to all customers using the Employee Center. To access Employee Center in the Zoom application, see Employee Center for Zoom.	Embedding Employee Center within Zoom enables employees to access the portal without leaving the Zoom client.
Improve agent productivity by integrating ServiceNow with Zoom Team Chat	Pre-integrated with IT Service Management. Can also be integrated with HR Service Delivery and other Enterprise Service Management applications. Collaboration services. For information about Collaboration services, see Collaboration services.	• Enables agents to initiate a Zoom chat with an employee from a ticket and then import the chat transcript back to the ticket as a comment. • Enables employees with specific permissions to view Zoom chats from a task record.
Enable agents to collaborate on tickets with Zoom Meetings	Notify plugin	Expanding Notify with a Notify Zoom Connector enables agents to manage and initiate a Zoom meeting directly from a ticket.

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ServiceNow for Zoom integrations (continued)

Objective	Requirements	Capabilities
	To implement Notify connector for Zoom, see Notify Zoom connector.	
Build custom integrations	For information about building custom integrations, see Zoom spoke.	Create custom integrations using Zoom spoke.

Get started

Explore  Learn about how agents and employees use Collaboration services for Zoom.	Configure  Plan and configure your implementation.	Integrate  Extend Zoom capabilities by integrating with other applications.
Use  Initiate and import Zoom chat messages.	Reference  Get details about components like Zoom APIs.	

Exploring Collaboration services for Zoom

Collaboration services for Zoom provides employees with seamless self-service without leaving the Zoom client and enables agents to resolve their task records faster.

Collaboration services for Zoom is pre-integrated with IT Service Management. It can also be integrated with HR Service Delivery and other Enterprise Service Management applications.

Collaboration services for Zoom Team Chat

Collaboration services for Zoom offers the following capabilities:

- Allows agents and employees to collaborate to resolve a ticket.
- Enables agents to initiate a Zoom Team Chat with an employee from a task record.

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- Enables agents to import the Zoom Team Chat transcript back to the task record as a comment.
- Enables employees with specific permissions to view Zoom Team Chat from a task record.

Collaboration services for Zoom Team Chat

Collaboration services for Zoom helps employees to interact with agents and resolve their IT-related issues from within the Zoom application.

Collaboration services for Zoom offers the following capabilities:

- Allows agents and employees to collaborate to resolve a ticket.
- Enables agents to initiate a Zoom Team Chat with an employee from a task record.
- Enables agents to import the Zoom Team Chat transcript back to the task record as a comment.
- Enables employees with specific permissions to view Zoom Team Chat from a task record.

Configuring Collaboration services for Zoom

Set up your ServiceNow instance to integrate with the Zoom application.

To connect your ServiceNow instance to your Zoom application and to authorize, you must have the Zoom admin role along with the ServiceNow admin role.

Set up Zoom spoke

Integrate your Zoom account with your ServiceNow® instance. Create a custom OAuth application in Zoom and authenticate requests from ServiceNow.

For complete information about setting up a Zoom spoke, see Zoom spoke.

Enable Zoom chat integration

Enable the Zoom Team Chat feature on your ServiceNow® instance by setting the related system properties.

Before you begin

Ensure you have installed and set up the latest version of the Zoom spoke (Zoom spoke v 4.0.3 or a higher version) application and Collaboration services plugin (sn_tcm_collab_hook) (Collaboration services v 3.7.0 or a higher version).

Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. In the Name search field of the System Properties [sys_properties] table, enter `sn_tcm_collab_hook.enable_zoom_chat_integration`.
3. Select the system property **sn_tcm_collab_hook.enable_zoom_chat_integration**.
4. In the Value field, enter **true**.

> **Note:**
>
> The Value field entry is false by default.

5. Set the Read roles value to **admin**.
6. Select **Update**.

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Result
The Zoom Team Chat feature on the ServiceNow instance is enabled.

Install fix-script for Collaboration services for Zoom

Install the *fix_script_start_chat_field_decorator_IT* in the ServiceNow instance to display **Start Zoom Chat** field decorator/icon in the ticket to initiate a chat with the requester.

Before you begin
Role required: admin

Visit the app store Collaboration Services and download the update set *fix_script_start_zoom_chat_field_decorator.xml*.

Procedure

1. Navigate to **System Update Sets** > **Retrieved Update Sets** > **Related Links** > **Import Update Set from XML**.
2. On the Import XML form, do the following.
   a. Select **Browse**.
   b. Select *fix_script_start_zoom_chat_field_decorator.xml* XML file.
   c. Select **Upload** to upload the XML file.
3. Navigate to **System Update Sets** > **Retrieved Update Sets**.
4. Select **Fix script to add start zoom chat field**.
5. Select **Preview Update Set**.
6. Select **Commit Update Set**.

   The Fix script to add start Zoom chat field decorator will be in Committed state.
7. Navigate to **System Definition** > **Fix Scripts**.
8. In the **Name** search field, enter `Fix script to add start zoom chat field`.
9. Click **Fix script to add start zoom chat field** fix script.
10. Select **Run Fix Script**.

    The  icon is displayed as a field decorator in a record.

Integrating and using ServiceNow® with Zoom

Collaboration services for Zoom Team Chat enables agents to initiate chat with employees and import the chat, and enables employees to view and receive chat service from within#he Zoom application.

Collaboration services for Zoom Team Chat offers the following functionality:

- Agents can initiate a Zoom chat with an employee from a task record.
- Agents can import the Zoom chat transcript back to the task record as a comment.
- Employees can view and receive the task record resolution service from within#he Zoom application.

Enhance employee experience by integrating ServiceNow® with Zoom

ServiceNow integration with Zoom helps employees to interact with agents and resolve their IT-related issues using Zoom.

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Starting and importing a Zoom Team Chat

Initiate a Zoom Team Chat conversation with the requester to resolve the ticket and import the chat as task record comments.

Start a Zoom Team Chat

Start a Zoom Team Chat with an employee through an open ticket to resolve an incident, request item, and change request.

Before you begin

You must have the write role to use the#Start Zoom chat #feature for incident, request, and change request tasks. This role is available when you activate the IT Service Management role plugins or for all instances by default.

Record and related configuration role

Record	Role	Plugin
Incident	sn_incident_write	ITSM Roles - Incident Management (com.snc.itsm.roles.incident_management) plugin
Change Request	sn_change_write	ITSM Roles — Change Management (com.snc.itsm.roles.change_management) plugin
Request	sn_request_write	ITSM Roles — Request Management (com.snc.itsm.roles.request_management) plugin

Ensure you've installed the fix script to enable the display of the Zoom chat icon associated with the Caller field. For more information, see Install fix-script for Collaboration services for Zoom.

Role required: agent

Procedure

1. Navigate to an open task record (incident, change request, or request item) in your ServiceNow instance.
2. Start the chat by selecting **Start Zoom Chat** or the Start Zoom chat icon  associated with the Caller field.
3. In the Start Zoom chat dialog box, select the participants.

   All users from the assigned group for the ticket are in the Recommended section of the dialog box by default. The user who initiates the chat is added to the Selected list of participants.
4. On the form, fill in the fields.

Start Zoom chat form fields

Field	Description
Add Participants	Option to add the users and stakeholders to work toward the resolution of the ticket.

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Field	Description
	○ **User**: Enter the name of the user to include in the chat. ○ **Group**: Enter the group of users to be included in the chat. If the On-Call Scheduling (com.snc.on_call_rotation) plugin is activated, the On-Call Scheduling users are added when you select a group. When On-Call Scheduling (com.snc.on_call_rotation) plugin isn't activated, it adds all users from the selected group. ○ **Email**: Enter a valid email of the participant to be included in the chat. After adding the required stakeholders, select#**Add to selected**.
Chat title	The title of the chat that will be displayed in the Zoom application. The default title is the ticket number appended with the short description.
Create an opening message	Option to provide an opening message to the user before beginning an interaction.

5. Select **Start Chat**.

   When the user validation is complete and a Zoom Channel is created for the current instance of the ticket, you are directed to the chat channel in the Zoom application.

   Zoom Team Chat displays the chat title and the opening message provided by the agent.

6. Interact with the ticket requester in Zoom Team Chat.

   You can send files supported by the Zoom application.

   On the ServiceNow instance, the system captures work notes about the chat details.

   A Zoom chat Interaction record is automatically created if the requester is a participant in the chat conversation. The requester can then access chat details in the **Activities** section. For information about a ticket requester mapping, see Create requester mapping.

   a. In the Activities section of the record, find the comment that contains a link to access the chat interaction.

   b. Select the link.

      The chat transcript is stored in the#Activities#section.

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Chat activities

Field	Description
Users	Users associated with the chat.
Document	Source record number.
Initiated by	Agent who has initiated the chat interaction.
Topic	Chat title.
Activities	Chat transcript.

7. Resume the chat either with the same user or with the same user plus additional users in the Start Zoom chat form.
   - To continue the chat from the record with the same user, select **Continue Chat**.
   - To start a new chat that includes additional users, add the users and provide a title for the chat in the **Chat title** field and an opening message in the **Create an opening message** field.

Reassign a ticket

Reassign a ticket to another user with a valid Zoom account.

Before you begin

Role required: admin

Procedure

1. Navigate to an open task record (incident, change request, or request item) in your ServiceNow instance.
2. Search and select the new user name in the **Assigned to** field.

   The new user must have a valid Zoom account. Else the ticket is not assigned to the new user and an error message is added in the system logs.

   Any logged in Zoom user who is not a participant of ticket/chat can reassign the ticket to a valid user on behalf of the chat initiator.

3. Right-click the form header and click **Save**.

Import Zoom Team Chat messages

Import the chat conversation manually or automatically with a user from#Zoom application, which appends and stores the messages in the#Comments section of the ticket in the ServiceNow® instance.

Before you begin

You must have the write role to use the#mport messages from Zoom #feature for incident, request, and change request tasks. This role is available when you activate the IT Service Management role plugins or for all instances by default.

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Record and related configuration role

Record	Role	Plugin
Incident	sn_incident_write	ITSM Roles - Incident Management (com.snc.itsm.roles.incident_management) plugin
Change Request	sn_change_write	ITSM Roles — Change Management (com.snc.itsm.roles.change_management) plugin
Request	sn_request_write	ITSM Roles — Request Management (com.snc.itsm.roles.request_management) plugin

Role required: agent

About this task

Importing messages helps agents to view the history of a ticket in one place. So, the information required for post-ticket review is captured and results in continuous improvement processes.

When an agent imports a chat, attachments within the configured file size limit are uploaded to the record. If the uploaded attachments are larger than the configured file size limit, then those attachments appear as a link to the file on the Zoom server.

When an existing chat is continued, auto import occurs again. Auto import is cancelled when chats are archived.

If a parent chat in a thread is deleted, the **Import messages from Zoom** form displays the text that this message was deleted. The child messages in that thread are not deleted.

A tag with the label **External** indicates that a user is listed in the Zoom application users and not present in the ServiceNow instance, or when the user isn't present in the Zoom application.

Note:

An agent can import a chat only if there's an existing chat record for the ticket and they're a participant of the chat.

Procedure

1. Navigate to an open task record (incident, change request, or request item) in your ServiceNow instance.
2. Select **Import messages from Zoom** from the Related Links section.

Note:

If you don't see **Import messages from Zoom**, then on the form menu, select **Reload form** to refresh the ticket form.

3. On the Import messages from Zoom form, fill in the fields.

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Import messages from Zoom#form

Field	Description
Select a conversation	Conversation to import the messages for the record.
Participants	List of users who are participants of the chat.
Import messages as	Method used to import messages. ○ **Additional comments**: The messages are appended in an **Additional comments** field and the users can view them. ○ **Work notes**: The messages are appended in the **Work notes** field but can be viewed only by internal users.

You can also select the nested message threads in a chat.

4. Select **Import**.

   If the auto import of the messages is enabled in the chat configuration and you try to import the messages manually for a record, then the system displays a message that the chat is being imported using auto-import. For configuration information about auto import, see Customize the Zoom chat form.

5. On the form menu, select **Reload form** to refresh the ticket form.

Result

The imported chats and files are displayed in the **Activities** section of the ticket.

Chat-specific configuration for Collaboration services for Zoom

Configure chat-specific options for Collaboration services for Zoom.

ServiceNow Collaboration services for Zoom enables agents to customize the following aspects of Zoom chats:

- Configure Chat group to include On-call Scheduling users for Start Zoom Team Chat
- Configure chat form for different record types
- Create chat configuration to auto-import chats
- Create requester mapping
- Configure chat close condition

If you have the ServiceNow Collaboration services for Zoom in your environment, the customized chat-specific additional configuration is applicable by default for the following tables:

- Request Item (sc_req_item)
- Task (sc_task)
- Incident (incident)
- Request (sc_request)
- Change request (change_request)

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The admin can extend the custom configuration to the other tables as required. You can create one chat configuration for only one table at a time. You can extend the chat configuration to other tables by creating another chat configuration record.

Functionality of auto importing messages

All the chat messages from Zoom Team Chat will be auto imported to the ServiceNow instance at an interval of 30 minutes. The system looks for all new messages across all the chats and import the messages to the ServiceNow instance.

To prevent polling from running indefinitely on inactive conversations, if there are no new messages, the polling interval gradually extends until the polling stops.

The system verifies the record for new messages for every 30 minutes. If there are no new messages, the system checks for the new messages for an interval of 1 hour, 2 hours, 4 hours, and 8 hours. If there are no new messages in an interval of eight hours for seven days, the Auto Import polling activity is disabled.

If there is any message during any of the intervals, the auto import timer looks for new messages in the next interval and imports the messages. The timer is then reset to 30-minutes interval.

System Limits

The system imports a maximum of 500 active chats in a 30-minute interval. If there are more than 500 active chats, the system will not auto-import the new chat records for the 30-minute interval.

The system executes a maximum of 10000 sub-flows to import the chats for an interval of 30 minutes, 1 hour, 2 hours, 4 hours, and 8 hours intervals. This is a count of all the active sub-flows that auto-import the messages into ServiceNow.

If the system reaches the limit, a message is displayed to the agent on the **Start Zoom Chat** modal that, "Zoom Team Chat auto import system limits is reached. New chats will not be auto imported.".

When a ticket is closed, the system triggers auto import for one last time and posts the new messages in the **Work notes** (Chat history) section.

If there is an interaction record associated with the parent record then interaction record is also closed. The chat record is also closed as a part of this flow.

Configure Chat group to include On-call Scheduling users for Start Zoom Team Chat

On-call Scheduling users will be shown for Start Zoom Team Chat for an incident record.

The users who are associated with On-call Scheduling will be displayed in the **Selected** column of **Start Zoom chat** dialog box.

sn_tcm_collab_hook.zoom_on_call_tables_for_start_chat_action system property is created to support this functionality. You can extend this functionality to the change and request tables.

Extend On-call users for Start Zoom Team Chat

Shows the list of On-call users in Start Zoom Team Chat for a change, request, or a request item.

Before you begin
Role required: admin

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Procedure

1. In the navigation filter, enter `sys_properties.list`.
   The entire list of properties in the System Properties [sys_properties] table appears.
2. Enter `sn_tcm_collab_hook.zoom_on_call_tables_for_start_chat_action` in the **Name** search field.
3. Select **sn_tcm_collab_hook.zoom_on_call_tables_for_start_chat_action** system property.
4. Enter the table names in the **Value** field to which you need to extend the functionality.
   For example: change, request.
5. Select **Update**.

Customize the Zoom chat form

Customize the chat form for additional ServiceNow® Collaboration services tables by creating a chat configuration.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Collaboration Services** > **Zoom** > **Chat Configuration**.
2. Click#**Default** to view the default base system configuration.
3. Navigate to **All** > **Collaboration Services** > **Zoom** > **Chat Configuration**.
4. Create a new chat configuration Select **New**.
5. On the form, fill in the fields.

Collaboration Chat Configuration form

Field	Description
Name	Value for the configuration.
Order	Order of the configuration. You can define multiple chat configurations for a single table. The system executes the query based on the descending order.
Active	Option to activate the configuration. Select the check box to activate the configuration.
Messaging Type	Option to select the messaging platform.
Default	Option to keep the configuration as default. **Note:** You cannot define multiple default values for chat configuration.
Auto Import	Option to automatically import the chat.

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Field	Description
	Select the check box to automatically import the chat.
Table	Option to select specific chat feature for a table.
Inherit	Extend and apply to the configuration to the child tables.
Conditions	Option to define a condition for a chat for customizations.
Enable opening message	Option to provide a text message that displays to the user when the agent initiates a chat.
Opening message	Option to enable a text message that displays to the user when the agent initiates a chat. This field is enabled only if the#**Enable opening message** #option is selected.

6. Select **Submit**.

   The defined chat configuration defined is applicable only for the selected table. You can extend the chat configuration to other tables by creating another chat configuration record.

Create requester mapping

Create a requester mapping to extend the Zoom chat functionality to other tables.

Before you begin
Role required: admin

About this task
A requester-mapping record defines which field is representing the requester of a ticket in any given table.

Note:

If there's no requester mapping defined for a table, the interaction records aren't created. An error log is created for the admin to notify that the requester mapping isn't defined for a table.

Procedure

1. Navigate to **All** > **Collaboration Services** > **Requester Mapping**.
2. Select **New**.
3. On the form, fill in the fields.

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Requester mapping form

Field	Description
Table	Table to which the requester mapping should be applied.
Requester field	Field to select the requester for a record.
Inherit	Extends and applies the feature to the child tables.
Active	Option to activate the requester-mapping record.
Order	Order of the configuration. You can define multiple chat configuration for a single table. The system executes the query in the descending order.

4. Select **Submit**.

Define how a Zoom chat is closed

Define the way a Zoom chat is closed.

Before you begin

Role required: admin

About this task

When a ticket is set to inactive, the system does one final poll for any messages in the Zoom Team Chat. The participants are removed so no further messages about the ticket can be exchanged in the chat. The system then stops polling that chat.

If your custom application doesn't provide an **Active** option for determining whether the ticket remains active, you must either add that option (preferred) or define an alternate condition denoting the ticket as being closed or inactive.

Alternately, to adhere to platform standards, consider adding an active field to your custom application and maintaining the state of that field according to the business logic of your application.

When a parent ServiceNow record is closed, associated Zoom channel is archived, and only an admin user or that chat creator can post new messages on a closed chat or a channel. The users who are removed from a chat can only see the chat messages history.

Procedure

1. Navigate to **All** > **Collaboration Services** > **Close Conditions**.
2. Select **New**.
3. On the form, fill in the fields.

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Close conditions form

Field	Description
Table	The table to which the requester mapping should be applied.
Inherit	Apply the option to the child tables of the selected table.
Active	Option to activate the close condition.
Order	Order of the configuration. You can define multiple chat configurations for a single table. The system executes the query in the descending order.
Close conditions	Defines the condition that determines that the record is closed.

4. Select **Submit**.

Collaboration services for Zoom reference

Reference topics providing additional information about ServiceNow Collaboration services for Zoom components and forms.

For more information about the API scope for ServiceNow Collaboration services for Zoom, see Setup Zoom spoke

API permissions/scope for ServiceNow® integration with Zoom

The list of the API permissions/scope requested by the ServiceNow Collaboration services for Zoom are as follows.

Zoom API permissions/scope

Scope type	API scope	Description
User	user:master	View and manage a sub account's user information.
	user:read:admin	View all user information.
	user:write:admin	View user information and manage users.
Chat	chat_channel:read:admin	View all users' chat channel.
	chat_channel:write:admin	View and manage all users' chat channels.
	chat_message:read:admin	View all users' chat messages.
	chat_message:write:admin	View and manage all users' chat messages.
	imchat:read:admin	View all users' history and channels.

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Zoom API permissions/scope (continued)

Scope type	API scope	Description
	imchat:bot	Enable chatbot within Zoom Chat Client.

Now Assist for Employee Experience

Use the Now Assist for Employee Experience application so that your employees can have a seamless conversational interaction with Now Assist in Virtual Agent.

Get started

Explore



Learn more about Now Assist for Employee Experience

Configure



Configure Now Assist for Employee Experience

Use



Use Now Assist for Employee Experience

Reference



Know more about Now Assist for Employee Experience references

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

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Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Now Assist for Employee Experience

With the Now Assist for Employee Experience application, your employees can use Now Assist in Virtual Agent to quickly check the status of their work through conversations.

Now Assist for Employee Experience overview

Your employees can use the Now Assist in Virtual Agent, which is powered by generative AI chat capabilities, to engage in an interactive conversational experience. They can check the status of their tasks and approvals and also submit a catalog task.

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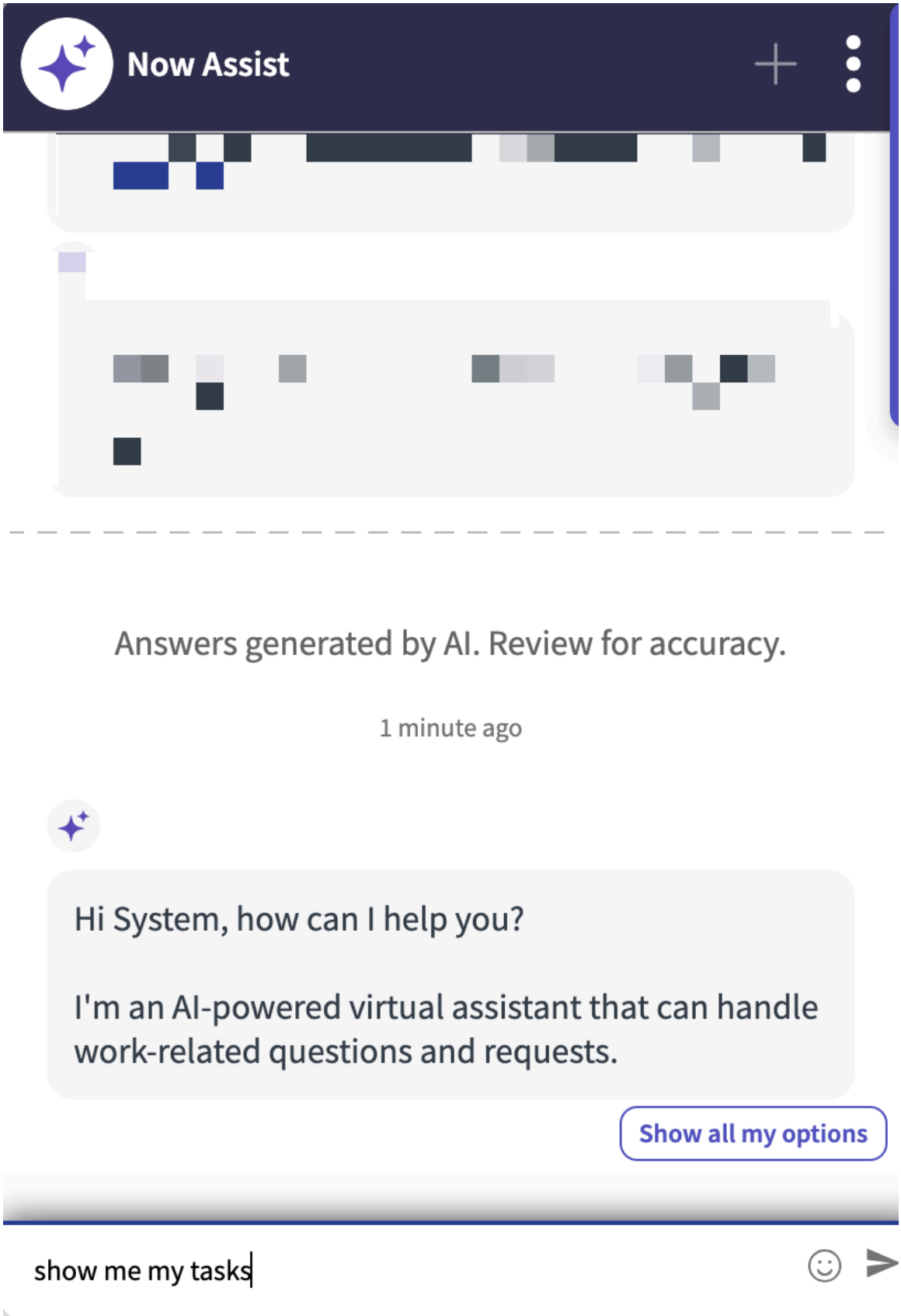

The Now Assist for Employee Experience enables your employees to check the following options:

My Tasks

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An employee can view the status of their tasks. They can check their assigned, pending, or open tasks. Depending on their query, the Now Assist in Virtual Agent shows the details of the tasks and lets them open a task for more information by using the Task center.

The Now Assist for Employee Experience supports the following tasks by default:

- HR tasks like submitting a catalog request
- Survey tasks

An employee can check their HR service tasks and also submit a request. They can mark a task as complete, view the checklist of a task, or upload a document to support a task. The Now Assist in Virtual Agent also enables an employee to take a survey with the chat survey task.

For example, a manager can chat with Now Assist in Virtual Agent by entering queries like `Show me my tasks`, `Show me my pending tasks`, `Show me my assigned tasks`, `Show me my open tasks`, or `Show me my tasks due today/due this week/due later/due soon`.

My Approvals

An employee can check the approvals that are assigned to them.

The employee's manager can directly approve or reject an approval. Depending on the query, the chat lets a manager approve or reject a task directly.

The Now Assist for Employee Experience supports the following approvals by default:

- Catalog request approvals
- Change request approvals
- KB article approvals

For example, a manager can enter a query like `Show me my approvals`, `Show me my approvals due today` or something similar.

Summarization for approvals

Use the Request, Requested item, and Case summarization skill for approvals to create useful summaries so that the approver users can understand the context quickly.

For more information, see Activate Now Assist for Employee Experience skills.

Expanded Now Assist search

When you search on topic pages and expand the search, the default search changes to Now Assist search.

Check Company news and events

Employees can check their latest company news and upcoming events. The AI Agent in the Now Assist in Virtual Agent displays a list of latest news and any planned events in the company.

For more information about the AI agent, see Company News & Events AI Agent.

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Learn more about the Now Assist journey

- Get an overview of the Now Assist framework.
- Discover the Now Assist panel.
- Explore the Now Assist skills available.
- Activate and configure a Now Assist skill using the Now Assist Admin console.
- Analyze and monitor Now Assist skill usage and performance.

For more information about an agentic workflow and activating the required components, see the following topics:

- Duplicate an agentic workflow
- Activate an agentic workflow template
- Modify an AI agent
- Implement access control in Now Assist AI agents

Related topics

Configuring Now Assist settings and features

Now Assist Admin console

Supporting information for Now Assist for Employee Experience

Get a quick overview of the key information related to the Now Assist for Employee Experience.

Supported versions

Now Assist for Employee Experience is supported starting from Xanadu Patch 3 and later versions.

Supported user interfaces

The Now Assist for Employee Experience application supports the following user interfaces:

- Now Assist chat bot in any service portal
- Now Assist Virtual Agent interfaces

Application information

Activate the Now Assist for Employee Experience store app (sn_ex_gen_ai).

This store app has the following dependencies:

- Now Assist for platform (sn_genai_platform)
- Employee Center (sn_ex_sp)

For more information, see Configure Now Assist for Employee Experience.

Configure Now Assist for Employee Experience

If you have the admin role, you can configure the Now Assist for Employee Experience application so that employees can use Now Assist in Virtual Agent to quickly check the status of their work through conversations.

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To-do configuration and skills

Your administrators can choose which portal's To-do configuration to apply Now Assist in Virtual Agent by using the *now.assist.todos_portals* system property.

The Now Assist for Employee Experience application uses Now LLM Service conversation skills. It uses the Now Assist Topic skill in Now Assist in Virtual Agent.

Before you begin

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't find an application, request it from the ServiceNow store.

   Use the following details when required:

   - Name of the application: Now Assist for Employee Experience
   - ID of the application: sn_ex_gen_ai

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select **Install**.
4. Review the version details and application dependencies.

   Dependent plugins and applications are listed if they'll be installed, are currently installed, or must be installed.

Result

The Now Assist for Employee Experience is installed.

Activate Now Assist for Employee Experience skills

You can activate the Now Assist for Employee Experience skills..

Before you begin

Before activating the Now Assist for Employee Experience skills, you must install the Now Assist for Employee Experience plugin.

Role required: admin

About this task

Activate the Now Assist for Employee Experience plugin to enable generative AI on your instance.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills**.

   If you're already in the Now Assist Admin console, select the **Now Assist Skills** tab.
2. On the navigation panel, select **Employee** > Employee Center to review the skill set.

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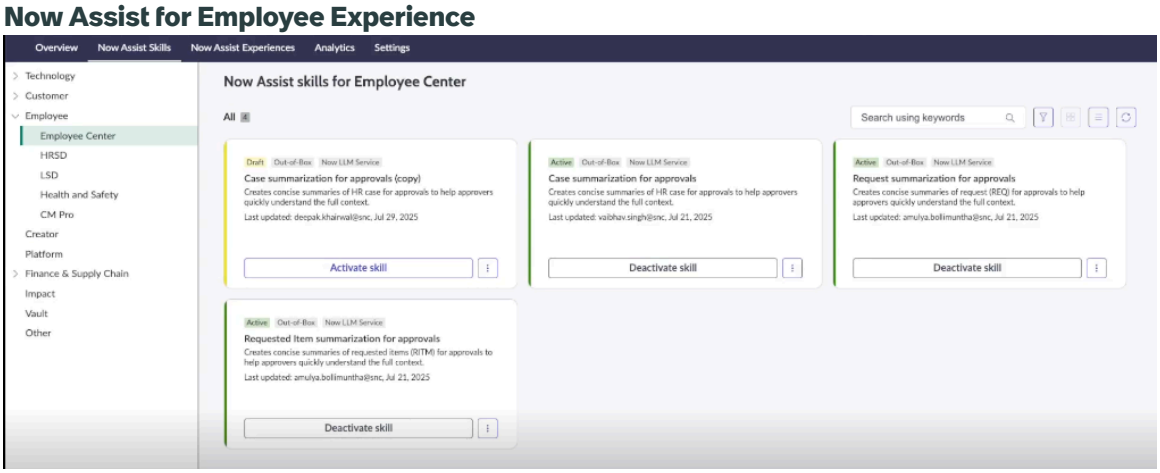
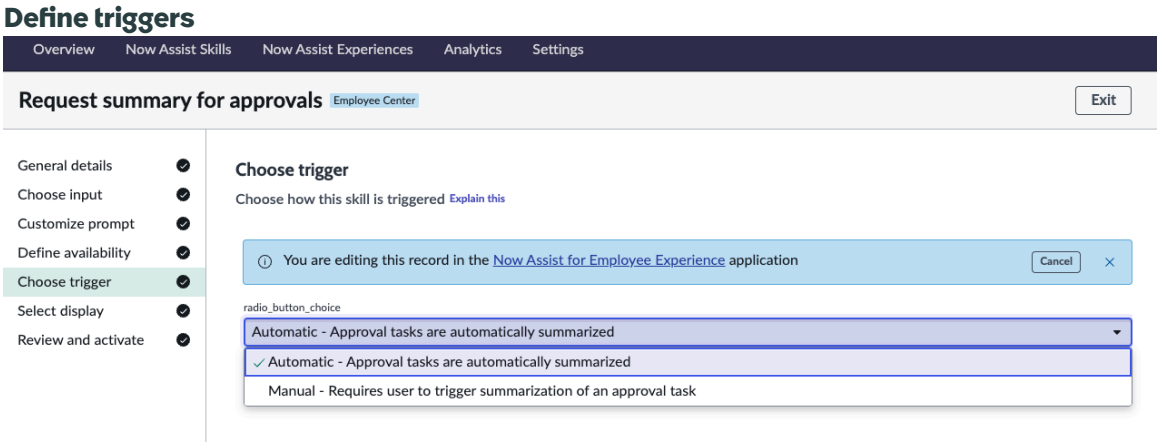


Toggle between the list and grid layouts for optimum viewing experience.

3. Verify and use the out-of-box settings in **General details**, **Choose input**, and so on.
   Use the options in the default setup for the most common use cases.
   - Select the step in the guided setup navigation.
   - Return to a previous step by selecting **Back**.
   - Select **Save and continue** to go to the next step.
4. **Optional:** Clone and edit a ServiceNow skill.
5. Go to **Define Trigger** and select one of the following triggers.
   - Automatic - Generates auto-summarization for the request, requested item, or case for approval task.
   - Manual - Requires user to trigger summarization for the request, requested item, or case for approval task.



6. Choose where to display Now Assist skills.
   For Now Assist for Employee Experience, use **In-product desktop**.
7. Review your choices and complete the configuration by selecting **Activate**.
8. Select **Activate skill**.
   On activation of the skill, the skill state changes to active.

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Result

On successful configuration, approval users can see summarization for approvals. For more information, see View summarization for approvals.

Using Now Assist for Employee Experience

Use the Now Assist in Virtual Agent to quickly check your tasks and approvals.

Check your to-do tasks by using the Now Assist in Virtual Agent

Check your to-do and pending tasks by using the Now Assist in Virtual Agent AI chat window. By checking these tasks, you can stay organized, prioritize the most important tasks on your list, and monitor how you're doing against your deadlines.

Before you begin

You can also perform the following steps in Now Assist in Virtual Agent for Microsoft Teams. You can check your to-dos and tasks similarly.

Role required: None

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Open chat**.
   Now Assist in Virtual Agent appears.
3. Enter your query.
   To check your to-do tasks, you can enter instructions like `Show my tasks`, `Show my pending tasks`, `Show my open tasks`, or `Show me my tasks due today/due this week/due later/due soon`.

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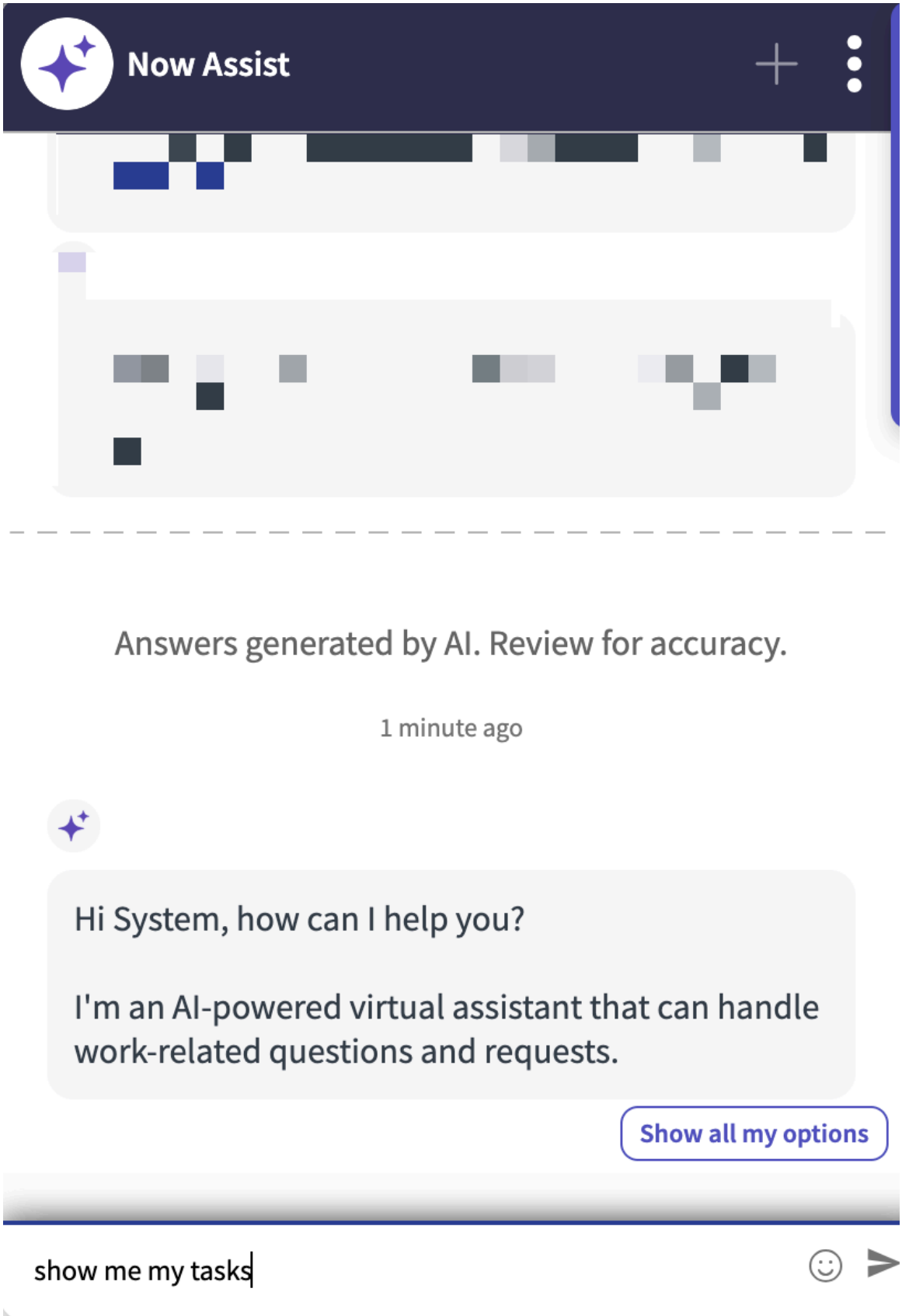

4. View the list of tasks, under the To-do Tasks, by selecting **Start**.

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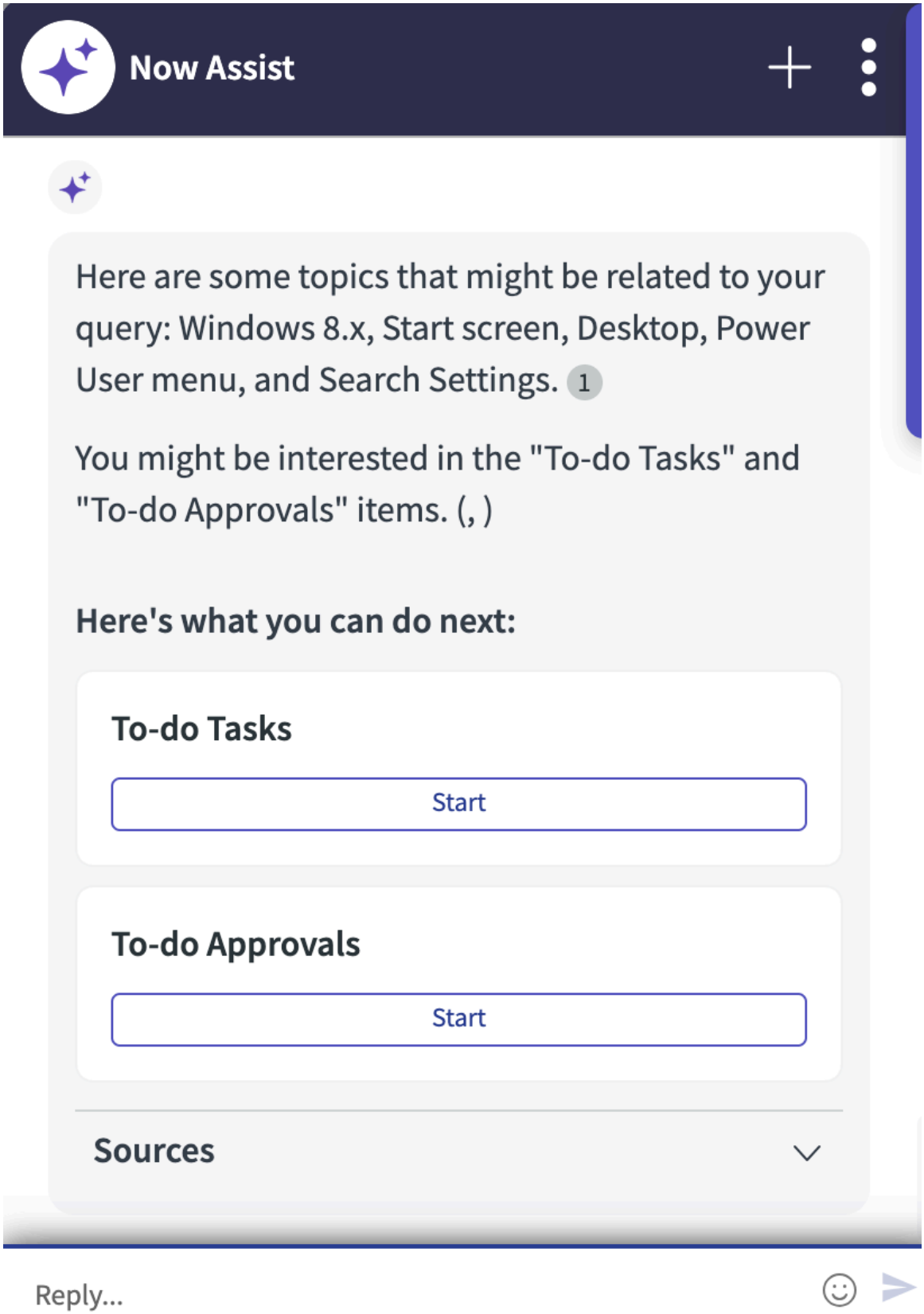

5. **Optional:** View the list of pending tasks in more detail by selecting **Task Center** in the response.
6. From the list of tasks displayed, select the task that you want to work on.
   The task details are displayed in the card.

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7. Select the task that you want to view or update.
   Save the changes.
8. **Optional:** Check other tasks by selecting **Continue**.
9. End the chat by selecting **End chat**.

Check your approvals by using Now Assist in Virtual Agent

Check the approvals that are assigned to you by using the Now Assist in Virtual Agent AI chat window. By checking your approvals before you begin your tasks, you avoid working on tasks that weren't approved and focus on what needs to be done.

Before you begin

You can also perform the following steps in Now Assist in Virtual Agent for Microsoft Teams. You can check your pending approvals similarly.

Role required: None

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Open chat**.
   Now Assist in Virtual Agent appears.
3. Enter your query.
   To check your to-do approvals, you can enter instructions like `Show my approvals`, `Show my pending approvals`, or `Show me my approvals due today/due this week/due later/due soon`.

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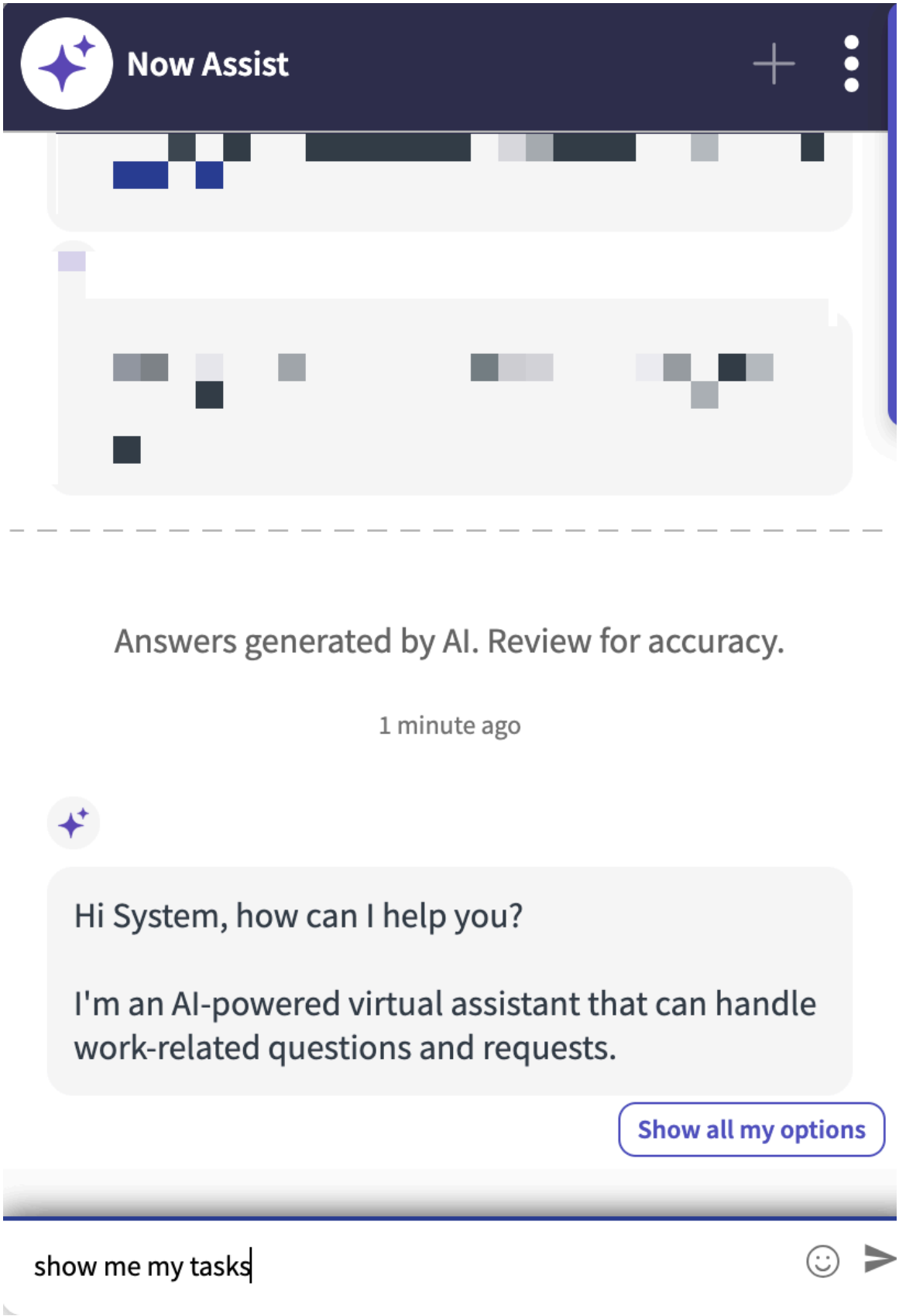

4. View the list of approvals, under the To-do approvals, by selecting **Start**.

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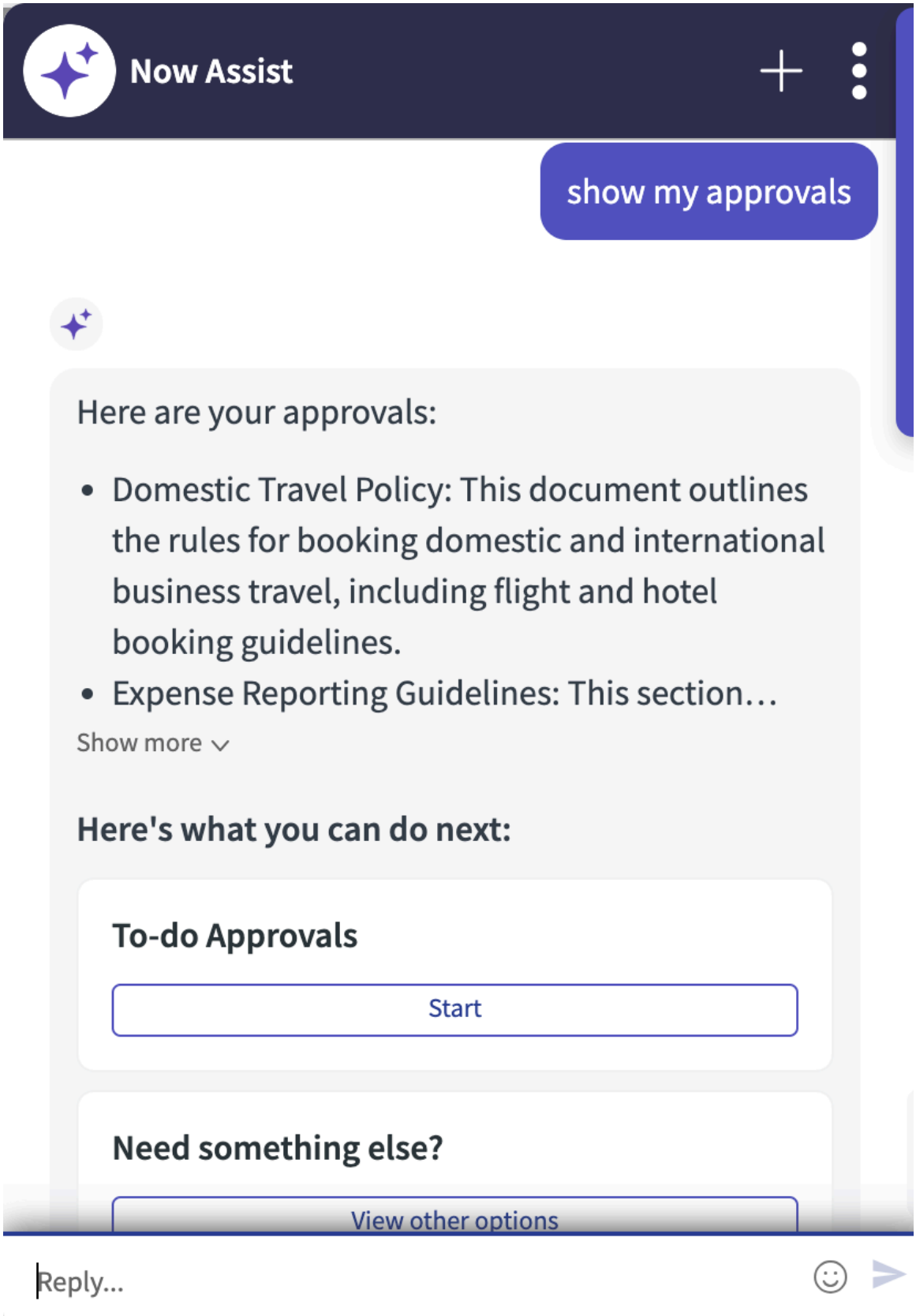

5. **Optional:** View the list of pending approvals in detail by selecting **Task Center** in the response.
6. From the list of approvals displayed, select the approval that you want to work on. The approval details are displayed in the card.

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7. Select **Approve** or **Reject**.
8. **Optional:** Skip the action by selecting **Skip**.
9. **Optional:** Check other approvals by selecting **Continue**.
10. End the chat by selecting **End chat**.

Check company news and events

Stay connected and informed on company updates, events, announcements, and more with the help of the AI Agent in the Employee Center Now Assist in Virtual Agent.

About this task

Check your local or company news at any time. Search for the upcoming events or know details of a specific event. The AI Agent provides you with the latest news and announcements. It responds to both general and vague questions.

The agent displays news based on your location and your interests. It displays your nearby events, local news stories, news about relevant people and also any topic of your interest.

Before you begin

You can also perform the following steps in Now Assist in Virtual Agent for Microsoft Teams You can check your company's latest news and events similarly.

Role required: none

Note: You can check the company news and events using the Virtual agent only if your company has enabled the configuration.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select **Open chat**.
   Now Assist in Virtual Agent appears.
3. Enter your query.
   - To check the latest news or know about any particular news, enter your query like `What's the latest news`, `show me the company news`, `show me news on 401k`, or anything.
   - To check about upcoming events or any specific event, enter your query like `Are there any events`, `show me the events happening in New York this month`, `show me all the company events` or anything.

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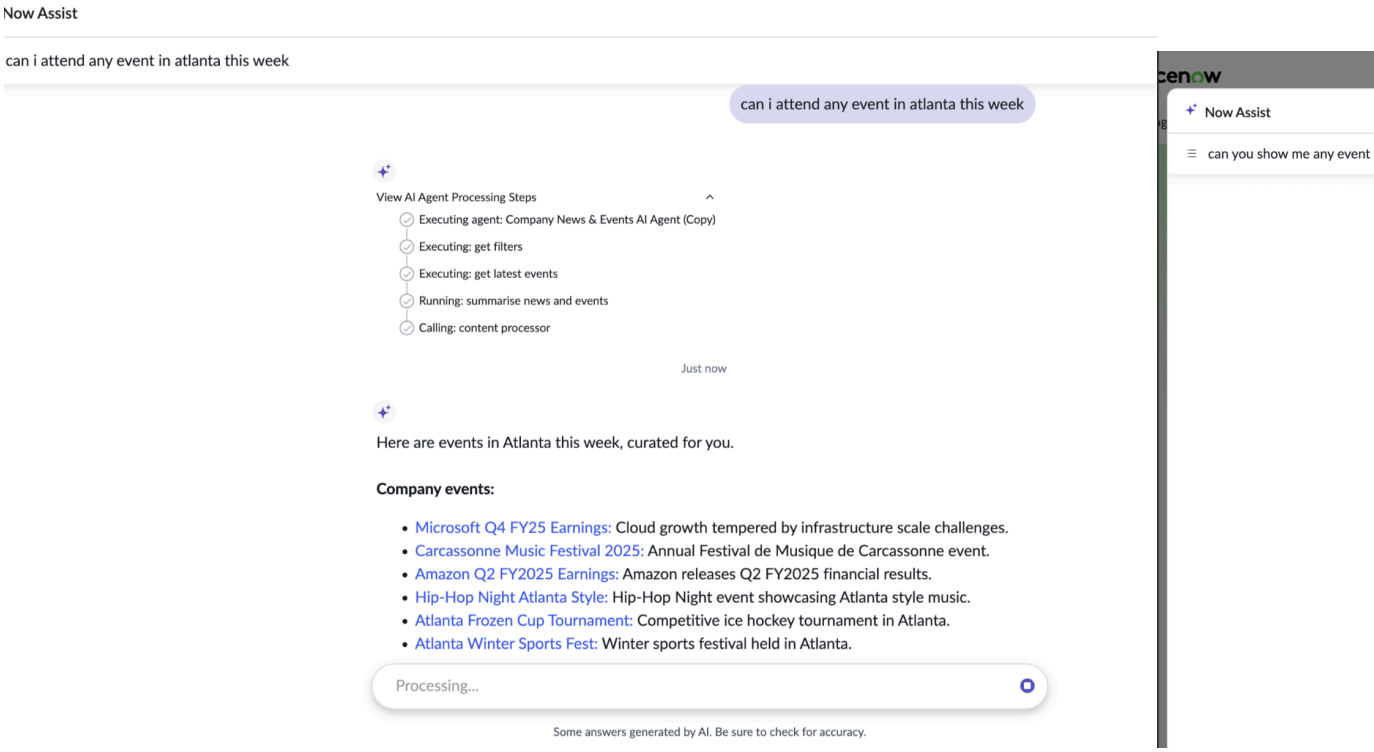

4. **Optional:** Search for a specific event to get more details.
   If the event requires RSVP, select **Yes** or **No**. If you have already specified your RSVP, you can also edit it.

View summarization for approvals

Check the generated approval summaries for cases, requested items, and requests for approvals. Based on the trigger selection by your admin, you can see contextual summary of the approval.

Before you begin

Ensure you have read access to the record to summarize.

Role required:approver_user, sn_request_read, sn_write

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **My tasks**.
2. Select the request from the available list that you want to work on.
   The details are displayed in the card with the summary
3. See Now Assist for Employee Experience generated summaries.

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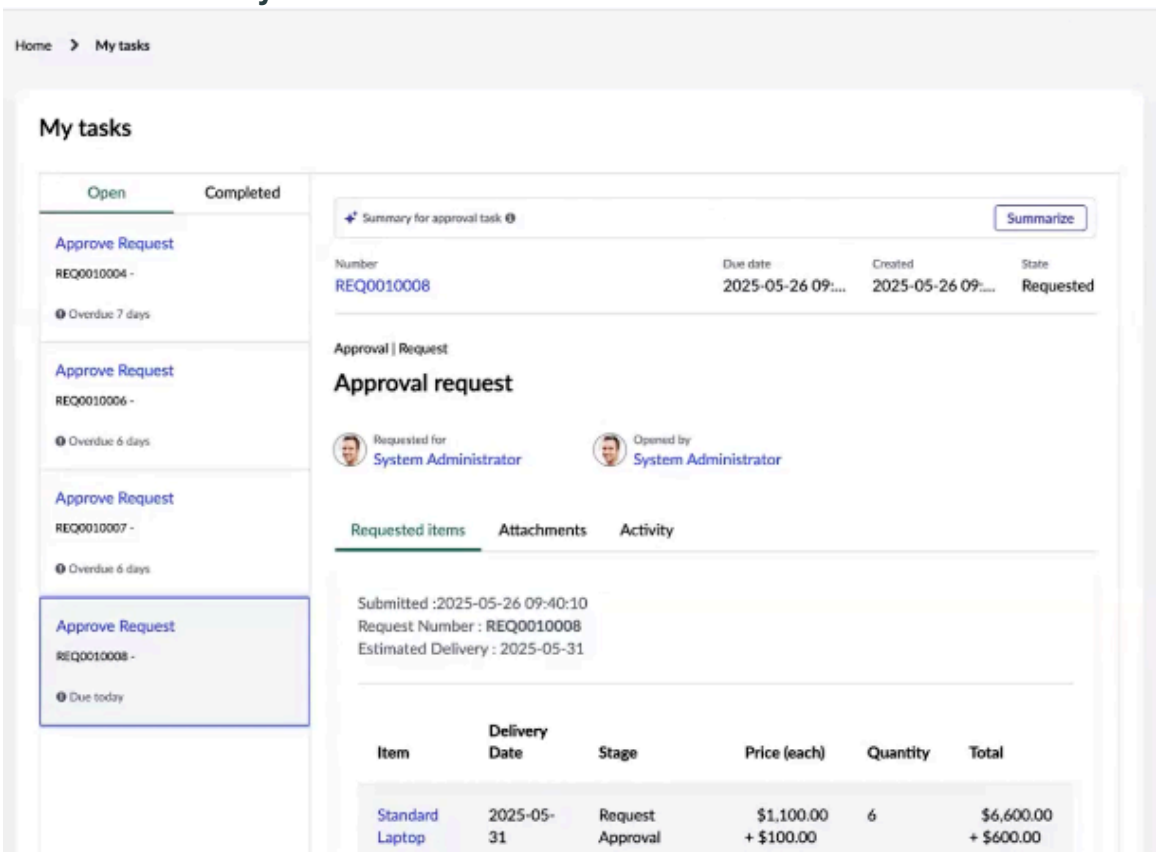
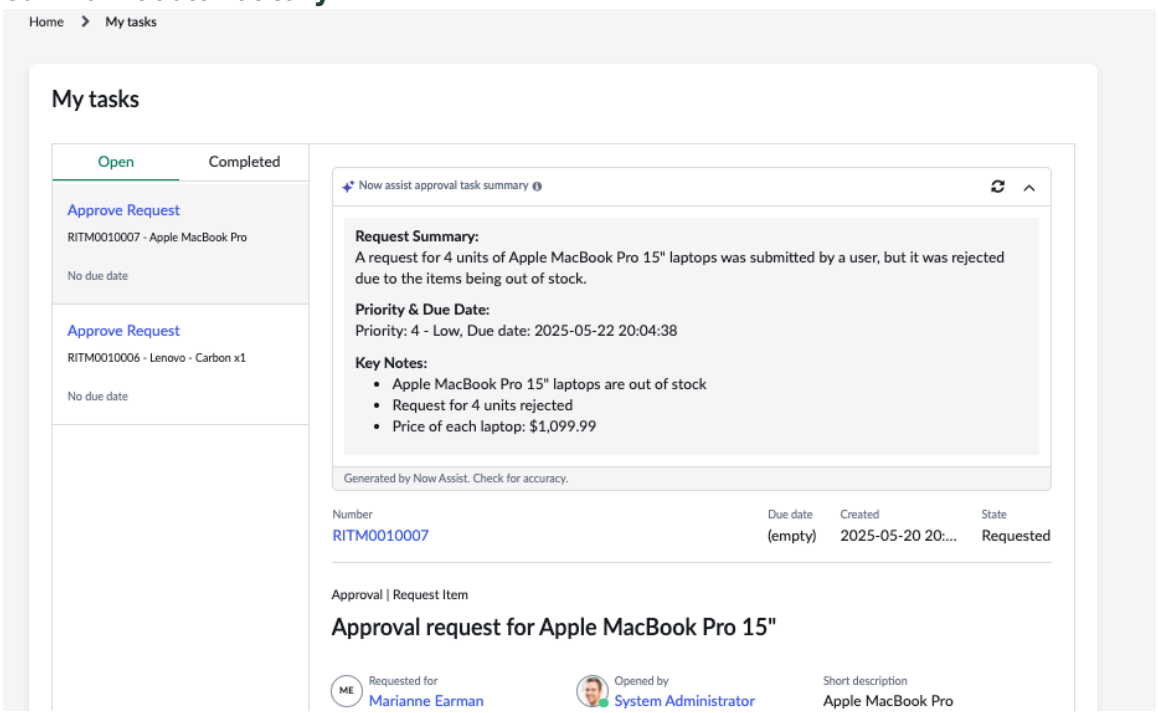
- Click the **Summarize** button when the trigger is manual.

Summarize manually



- See the auto-generated summary when the trigger is automatic.

Summarize automatically



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For more information on how to configure, see Activate Now Assist for Employee Experience skills

4. Select **Approve** or **Reject**.

What to do next

Proceed to Manage approvals with Now Assist Approval Assistance AI agent. Review how to set up and use the Approval Assistance AI agent. For more information, see Platform Approval assistance AI agent.

Note: Ensure the portal approval record is configured as explained in

Related topics

Activate Now Assist for Employee Experience skills

Manage approvals with Now Assist Approval Assistance AI agent

Manage the approvals that are assigned to you by using the Now Assist **Approval Assistance Agent** for REQ and RITM.

Before you begin

Ensure that you

- Download the Now Assist for Employee Experience plugin.
- Learn about AI agents and have read access to the record to auto-process approvals.
- Ensure you are on Zurich patch 4 or above.
- The agent supports only REQ and RITM.

Role required: approver_user, sn_request_read, sn_write

About this task

Use the Now Assist Approval Assistance Agent to manage your assigned approvals. Using an AI agent, you can

- Pull all the information and records for approvals automatically.
- Review the policies, checklist, and evaluation criteria.
- Approve the requests based on the Now Assist recommended decision.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **My tasks**.
2. Select the request from the available list that you want to work on.
   The details are displayed on the card with the summary.
3. Select the **Review with NowAssist** button.
   NowAssist performs the following actions:
   - Triggers an AI agent to review the request.
   - Verifies the request for policy compliance.
   - Generates an eligibility checklist and criteria.
   - Shows the criteria for match or mismatch.
   - Provides an option to act on approval such as **Approve** and **Reject**

Note: You can select **View AI Agent Processing Steps** to see the details.

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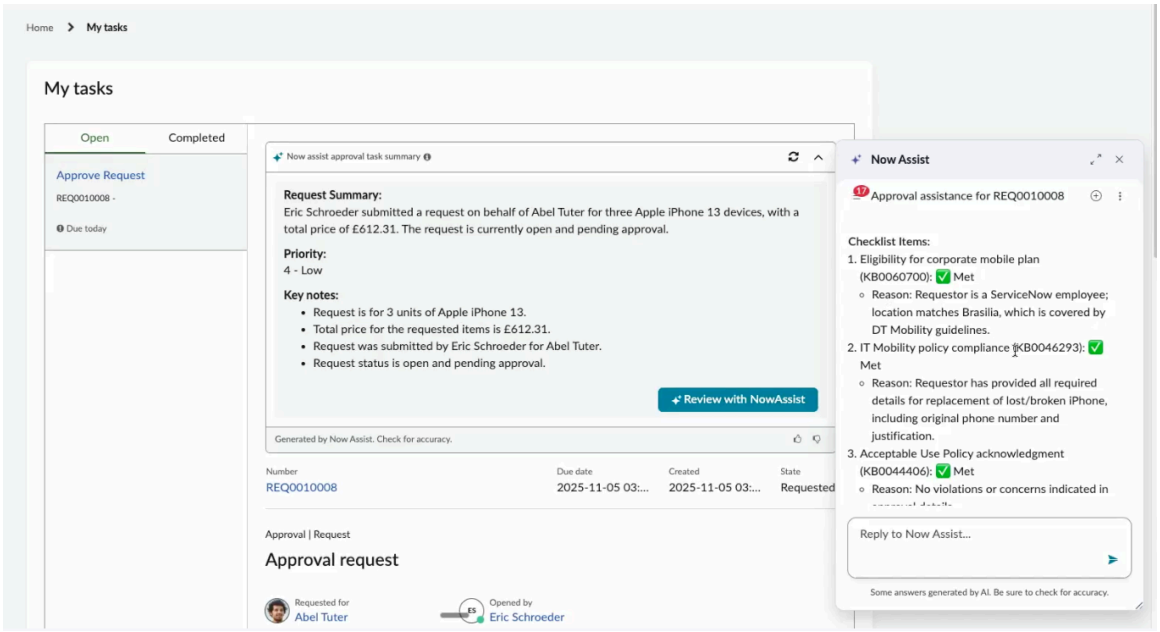
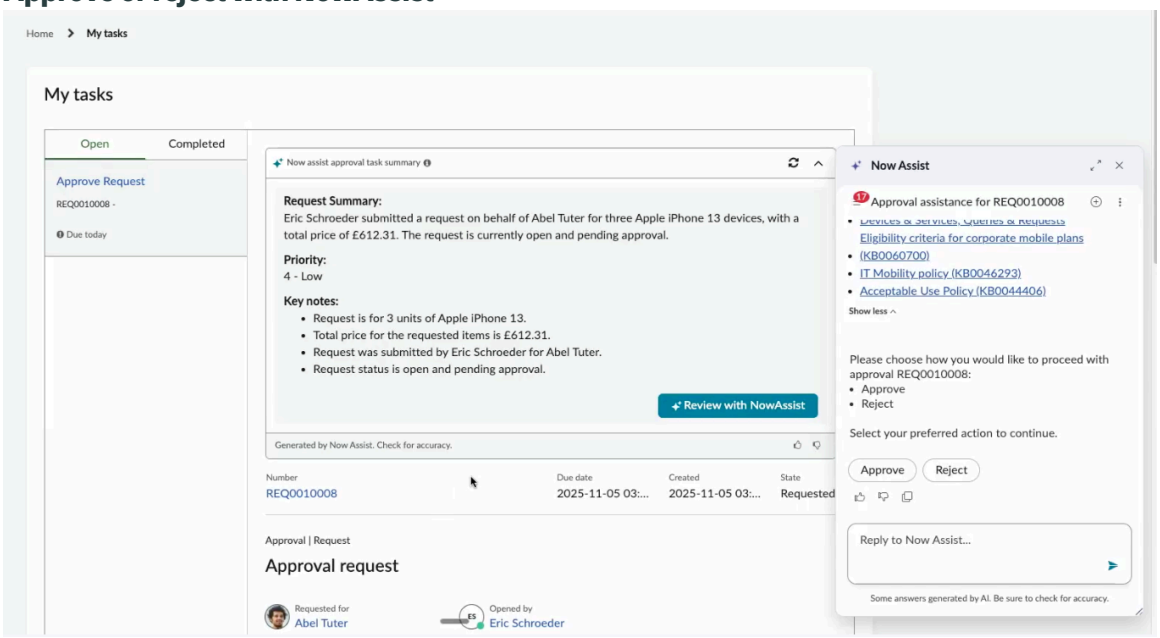
Review with NowAssist



4. Select **Approve** or **Reject**.

Approve or reject with NowAssist



Note: Currently, HR requests aren't supported out-of-the-box.

The response appears `I am ready to process your approval request for <request description>. Is it okay to proceed?`

5. Select **Yes** or **No**.

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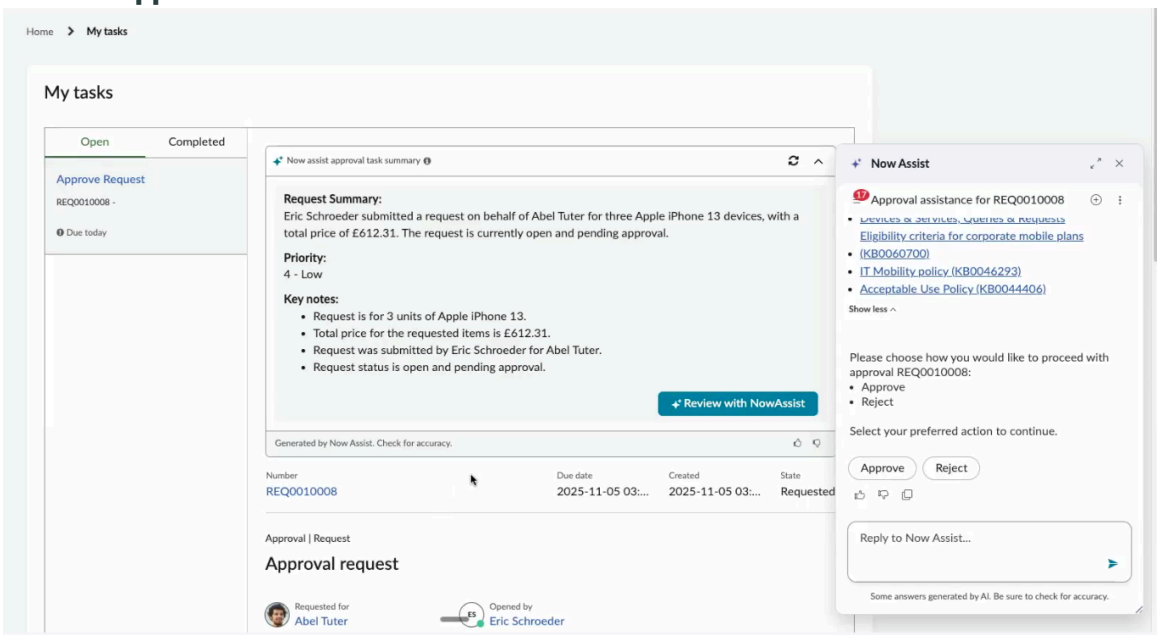
Confirm Approval with NowAssist



Note: The agent supports only REQ and RITM. HR requests aren't supported. However, by configuring the `sp_approval_configuration` record, you can set up support for for HR case too.

6. Request is approved and moved from **Open** to the **Completed** tab.

What to do next

Review how to set up and use the Approval Assistance AI agent. For more information about agentic workflow and activating the required components, see the following topics:

- Platform Approval assistance AI agent
- Activate an agentic workflow template
- Modify an AI agent
- Implement access control in Now Assist AI agents

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Using AI Agents with Now Assist for Employee Experience

Use AI Agents with the Now Assist for Virtual Agent in the Employee Center for users to have a seamless agent-like conversation.

Verify that you have the following plugins:

- Now Assist for Employee Experience version 2.0.3 and later. The AI Agents for Employee Experience is automatically installed with the updated version.
- Content Publishing version 36.0.4 (Installed automatically as part of Employee Center Pro)

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Table 1. Available AI Agents with Now Assist for Employee Experience

Agent name	Description
Company News & Events AI Agent	This Agent shares the latest updates on news, events, and announcements. It can understand and respond to general questions like 'What's the latest news?' or 'Are there any upcoming events?'

System properties

To display the AI agent output to users in the Now Assist in Virtual Agent conversations, you must set the system property *sn_aia.enable_va_conversation* value to **true**. By default, the property is set to **false**.

The properties are listed in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation context-menu filter.

System properties installed with the AI Agent

Property	Description
sn_aia.enable_va_conversation	Set this property to **true** to display the AI agent output to users while using the Now Assist in Virtual agent in the Employee Center. • Type: true/false • Default value: False

Important: All use case and AI agent records are read only by default.

To run the AI agents autonomously, you must first duplicate the use case, and then do the following steps:

- Activate the use case.
- Activate all agents within the use case.
- Activate the trigger to invoke the use case automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Company News & Events AI Agent

Use this agent to enable users to check their company-related latest news and upcoming events.

Verify that you have the following plugins:

- Now Assist for Employee Experience version 2.0.3 and later.

  The AI Agents for Employee Experience is automatically installed with the updated version.

- Content Publishing version 36.0.4 (Installed automatically as part of Employee Center Pro)

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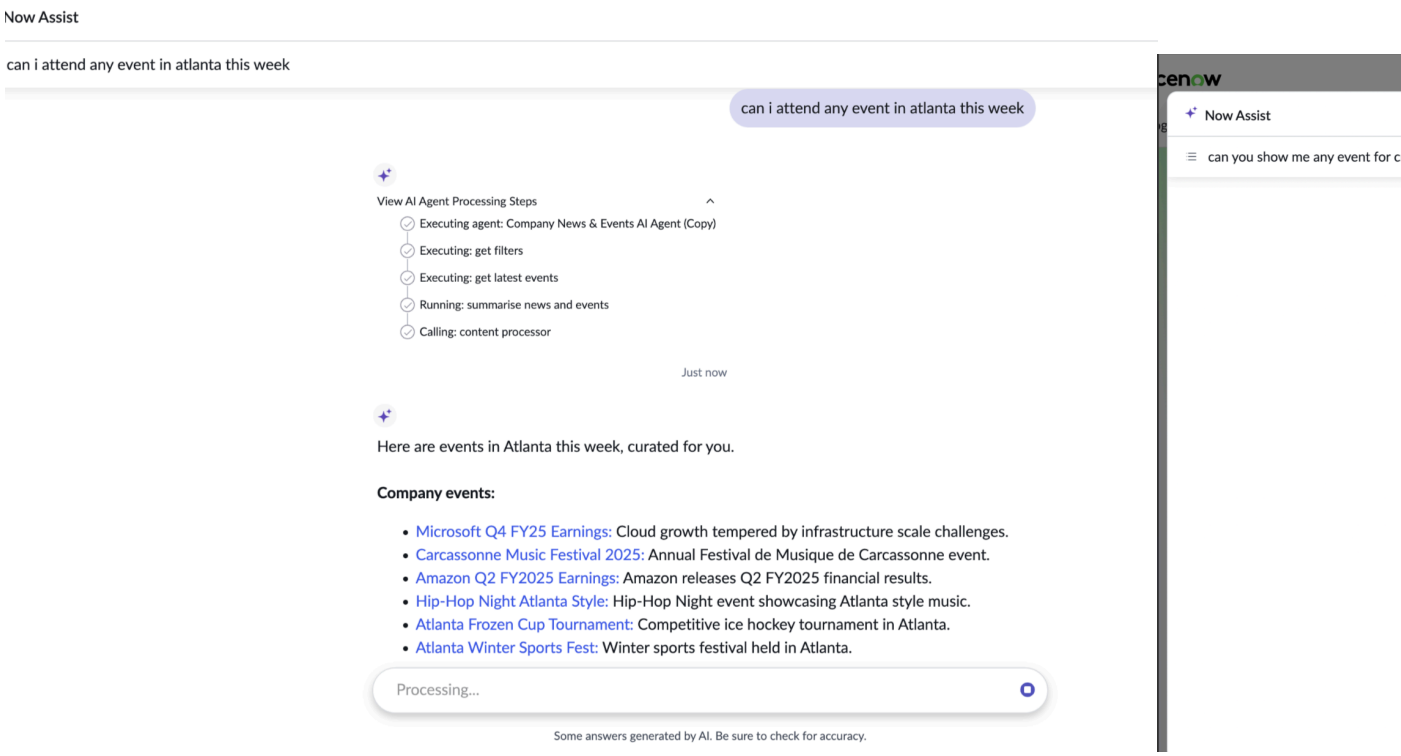
Important: To display the AI agent output to users in the Virtual Agent conversations, you must set the system property *sn_aia.enable_va_conversation* value to **true**. By default, the property is set to **false**.



Company News & Events AI Agent overview

The **Company News & Events AI Agent** helps users stay informed by sharing the latest updates on news, events, and announcements.

It understands general questions like "What's the latest news?" or "Are there any upcoming events?", casual questions like "show me New York news" or "what's happening in Atlanta this month," and also specific questions such as "Get the latest news on 401k," "Show me events happening in New York," or "Show local news."

On prompting, it also provides updates based on the user's location and their interests. Shows nearby events, local news stories, company updates, and news related to relevant people or topics the user cares about.

The agent helps users stay informed at all levels, from local to global.

View Company News & Events AI Agent in AI Agent Studio

To view the AI Agent, do the following:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Company News & Events AI Agent**.

To activate, refer to Activate Company News and Events AI Agent.

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Tools used by Company News & Events AI Agent

Table 2. Tools used by the Company News & Events AI Agent

Name	Type	Execution mode	Display output
Take event action	Scripts	Autonomous	true
Get next news and events	Scripts	Autonomous	false
Generate news detailed response	Scripts	Autonomous	true
Detail summary generator	Scripts	Autonomous	false
Get latest events	Scripts	Autonomous	false
Summarise news and events	Scripts	Autonomous	false
Content processor	Scripts	Autonomous	true
Get Filters	Scripts	Autonomous	false
Get latest news	Scripts	Autonomous	false

Activate Company News and Events AI Agent

Activate the Company News and Events AI Agent to enable users to check news and events in Now Assist in Virtual Agent.

Before you begin

Role required: admin

About this task

Enable the system property to display the AI agent output to users in the Now Assist in Virtual Agent conversations. In the AI Agent Studio, configure where the AI agent must display.

Procedure

1. Configure where the AI agent must display.
   a. Navigate to **All** > **AI Agent Studio** > **Overview**.
   b. Select **Company News & Events AI Agent**.
   c. In **Toggle display**, do the following:
      - Verify that the **Status** of the AI agent is active.
      - In the **Select display** section, do the following:
        i. In **Assistants where AI agents are discoverable**, select **Now Assist in Virtual Agent (default)**.
        ii. Enable the **Display** option.
2. Modify the *sn_aia.enable_va_conversation* system property.

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a. Search for `sys_properties.list` in the navigation.
A list of all the system properties are displayed.

b. Search and select *sn_aia.enable_va_conversation*.

c. Set the **Value** to **true**.

Result
The **Company News & Events AI Agent** is activated for users to check their news and events in the Now Assist in Virtual Agent.

Now Assist for Employee Experience reference

Learn more about the system properties installed with the Now Assist for Employee Experience application.

Properties installed with Now Assist for Employee Experience

Properties available with the Now Assist for Employee Experience application.

These properties are available for Now Assist for Employee Experience. The properties are listed in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation context-menu filter.

Properties for Now Assist for Employee Experience

Property	Description
sn_ex_gen_ai.now.assist.todos_limit	Set a limit on the number of tasks or approvals to be displayed at a time in the virtual agent chat window. • Type: Integer • Default value: 50
now.assist.todos_portals	Set the portal that you want to use for the To-do configuration. To set multiple portals,specify the portals by separating them with a comma: • Type: String • Default value: esc
sn_aia.enable_va_conversation	Set this property to **true** to display the AI agent output to users while using the Virtual agent in the Employee Center. • Type: true/false • Default value: False

Granular Delegation

Granular delegation allows employees to delegate their tasks to other employees for specific date and time ranges based on delegation rules.

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Granular delegation provides the ability to delegate specific records by table and condition. It also allows admins to delegate approvals and/or task assignments for task tables they administer.

A task is delegated when it matches the delegation rules specified for a delegation. For example, William can assign Jane as a delegate for approvals or tasks when the priority is set to High.

Service delegation options are available, like limiting a delegation to specific record types. For example:

- Limiting records that match a filter condition.
- Limiting records to only approvals.
- Limiting records to only task assignments.

Note: Granular Delegation is intended for employee users, not fulfiller or agent users, such as in ITSM. Depending on your use cases, fulfiller and agent delegation is better managed via Advanced Work Assignment.

Terms

The following terms are applicable:

- Delegate Admin: An employee that defines the tables used for delegation rules, defines delegation rules, and can assign delegates for employees.
- Delegator: An employee who delegates their tasks to another employee through a delegation record, specifying the delegate user, time frame, and delegation rules.
- Delegate: An employee who is delegated tasks that are assigned to another employee. The delegate also receives tasks assigned from the delegator. The delegate also receives notifications of these assignments and the time frame the delegation covers.

Granular Delegation with HR Service Delivery

Granular Delegation with the HR Service Delivery base system supports the HR task (sn_hr_core_task) table. Along with filter conditions, you can filter delegations for delegators and delegates.

For more information on how user criteria filters delegations for delegators and delegates, see Create delegation rules.

For information on HR criteria and user criteria, see:

- HR criteria
- User criteria for Service Portal

Access control rules (ACLs)

Access control rules (ACLs) in HR Service Delivery were modified to look for the Assigned to person on an HR task. Other domains that want to use Granular Delegation must modify their ACLs to use this feature. For more information about ACLs, see Access control list rules.

Rule-based and ad-hoc delegations

- Rule-based: The delegation_admin configures delegation rules, which automatically reassign tasks to specific employees.
- Ad-hoc: An employee who is defined as a delegator can delegate their tasks from the **My Delegates** widget in the Employee Center.

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Note: The delegation_admin must define a delegation rule table, delegation rules, and delegates. For more information on defining a delegation rule table see Add delegation rule tables. For more information on defining a delegation rule, see Create delegation rules. For more information on defining delegators and delegates, see Create a delegate.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Granular Delegation

Use Granular Delegation to allow your employees to delegate their tasks to other employees.

The base system provides your employees with the ability to delegate their tasks to other employees. This feature provides flexibility to your employees when:

- Out-of-the-office
- Assigned tasks are for the incorrect employee
- Assigned tasks require escalation

Tables

Granular delegation introduces two new tables:

Granular Delegate [sys_granular_delegate]

This table specifies:

- Who the service delegate is
- When the service delegation occurs
- What notifications to send the delegate

Delegation Rule [sys_delegation_rule]

This table specifies the condition for which task records are delegated if the rule is used in a delegation.

Application menu

Users can access the granular delegation tables from the **Granular Delegation** application menu.

Delegation Rules

Link to the Delegation Rule [sys_delegation_rule] table.

Delegation Rule Tables

Link to the Delegation Rule Table [sys_delegation_rule_table].

My delegates

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Link to the Delegate [sys_granular_delegate] table showing records where the current user has delegated tasks to another user.

Delegated to me

Link to the Delegate [sys_granular_delegate] table showing records where the current user is the delegate.

Approvals and assignments

Granular delegation allows you to delegate approvals and assignments separately. Task records include extensions of the Task table such as Change, Incident, and Problem records. Use a delegation rule to grant a delegate approval or assignment authority.

Note: Flows and workflows ignore delegation rules. If you use flows or workflows to manage task approvals or assignments, you must use the existing service delegation features instead.

Approvals

Approval authority allows a delegate to approve or reject approval requests. Add delegation rule conditions to specify which records your delegate can approve. Only records matching the condition appear in the delegate's list of approvals.

Note: A user must have the approval_user or business_stakeholder role to approve IT requests (does not apply to HR approvals) on Employee Centre. This role validation has not been implemented in Core UI 16 because modifying ACLs in UI16 might have broader implications at the NowPlatform level.

Assignments

Assignment authority grants a delegate access to the task records assigned by delegation. Add delegation rule conditions to specify which records your delegate has access to work on. Only records matching the condition appear in the delegate's list of task assignments.

Granular delegation does not change a delegate's access to records. To access records, a delegate must already have the necessary roles. For example, to delegate task records, a delegate must have a role such as itil to access the Task table and its extensions.

Some HR records explicitly grant access to delegates.

Notifications

Each time you authorize a delegate, the delegate receives the following **email** notifications:

Start of delegation

The delegate receives a notification at the start of the delegation period.

Assignment by delegation

The delegate receives a notification each time an approval or task is assigned.

You can also specify additional notifications options.

All notifications

Option to send the delegate a copy of all notifications you receive during the delegation period. Select this option when you want the delegate to receive the delegation notification. For example, you want the delegate to receive notifications

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about activity stream or record updates. It is set to False by default to avoid concerns around getting notifications that has critical and sensitive data.

All columns are contained in the Granular Delegate [sys_granular-delegate] table.

Note: Notifications with the **Exclude Delegates** option enabled override the True setting of this option. Use the **Exclude Delegates** option to prevent delegates from seeing confidential or protected information.

Meeting invitations

Option to forward delegates meeting invitations. Select this option to forward the delegate any meeting invitations the instance generates or receives for you. It is set to False by default.

System property

Administrators can specify which versions of service delegation they want to support from the glide.approval.delegation.version system property.

The glide.approval.delegation.version system property specifies the service delegation features to support. Choices include `v1`, `v2`, and `v3`.

Enter `v1` to support only the prior service delegation features. This value disables support for granular delegation features.

Enter `v2` to support only granular delegation feature. This value disables support for the existing service delegation features.

Enter `v3` to support both granular and existing service delegation features.

- Type: string
- Default value: v3
- Choices: v1, v2, v3
- Location: System properties

Scheduled jobs

The following scheduled jobs are provided:

- Notify new delegates
- Clean Granular Delegation Records

E-signature support

Granular delegation supports Approvals with e-Signature (com.glide.e_signature_approvals). When enabled, the system requires delegates to enter their credentials to fulfill an approval.

Setting up Granular Delegation

Set up Granular Delegation so your employees can delegate their tasks to other employees.

Configuration steps

1. Activate Granular Delegation
2. Define what tasks can be delegated by adding the table that holds the tasks: Add delegation rule tables

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3. For each delegation table: Create delegation rules
4. Define the users that can delegate tasks and to whom they can be delegated: Create a delegate

Installed with Granular Delegation

Activate the Granular Delegation plugin (com.glide.granular_service_delegation) for the ServiceNow AI Platform if you have the admin role. For more information, see Activate Granular Delegation.

Granular delegation has separate records for specifying a delegate and specifying what content the delegate can access. You create a Delegate record each time you want to delegate your service tasks to another user.

Administrators create delegation rules to allow the delegation of specific records. Access Control Rules (ACLs) determine if a delegate can access the records that match the delegation rules assigned to them. Creating delegation rules requires an administrator to be familiar with the data model of the delegated services.

Roles installed

Role	Description	Contains roles
Delegation admin [delegation_admin]	Manages granular delegation, setting up delegation rules.	N/A

User Criteria (user_criteria)

Granular delegation can use the User Criteria (user_criteria) table to determine who can be a delegate or a delegator. For more information, see Create delegation rules.

System properties

The **com.glide.delegation.default_days_since_update** system property determines how many days to retain inactive delegation records for users or delegates. The default is seven (7) days and can be changed to a maximum of 30 days.

Any delegate record that was created before the start date and hasn't been updated within the last seven days (or the value entered in the sys property) is not assigned to a delegate until the delegate record is updated. For example, approval tasks that were created before the number of days in the sys property are not visible to the assigned user. You can create a work note to update the delegate record to make the approval visible to the assigned user.

Note: Changing the value in the sys property does not affect delegate records created before the original value entered.

Scheduled jobs

The **Clean Granular Delegation Records** scheduled job runs daily and deletes inactive delegation records based on the **com.glide.delegation.default_days_since_update** system property value.

The **Notify new delegates** scheduled job runs every 10 minutes and triggers a notification to delegates that their delegation period is starting.

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Activate Granular Delegation

You can activate the Granular Delegation plugin (com.glide.granular_service_delegation) for the ServiceNow AI Platform if you have the admin role.

Before you begin

Role required: admin

If the Human Resources Scoped App: Core (com.sn_hr_core) plugin is activated, the Employee Center is also included. On-demand delegations can be performed with the Employee Center or the ServiceNow® mobile.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Granular Delegation plugin (com.glide.granular_service_delegation) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Add delegation rule tables

To create delegation rules, you must add a task table to the **Delegation Rule Tables**.

Before you begin

Role required: delegation_admin

Note: Adding a table to a delegation rule table does not automatically support delegation.

Procedure

1. Navigate to **All** > **Granular Delegation** > **Delegation Rule Tables**.
2. Select **New**.

   Note: Ensure you are in the correct scope you want to create delegation rules for. Only tables for the scope you are in appear.
3. From the **Table** list, select a task table from your current scope that supports delegation.
4. Select the **Active** option.
5. Select **Submit**.

What to do next

Next, create a delegation rule to specify the records that are available for employees to delegate. See Create delegation rules.

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Create delegation rules

Specify which records are available for service delegation. Specify records by table name, by a condition, and by whether they are an approval or an assignment.

Before you begin

Role required: delegation_admin

If you have not done so already, create a delegation rule table. See Add delegation rule tables.

About this task

Administrators create delegation rules to allow the delegation of specific records. Access Control Rules (ACLs) determine if a delegate can access the records that match the delegation rules assigned to them. Creating delegation rules requires an administrator to be familiar with the data model of the delegated services.

Important: Granular delegation does not change a delegate's access to records. To access records, a delegate must already have the necessary roles. For example, to delegate task records, a delegate must have a role such as itil to access the Task table and its extensions.

Procedure

1. Navigate to **All** > **Granular Delegation** > **Delegation Rules**.
2. Click **New**.
3. On the form, fill in the fields:

Delegation Rule form

Field	Description
Name	Label for the delegation rule.
Application	Application associated with the delegation rule. This field is not editable and shows the application of your correct scope.
Short Description	Summary of the delegation rule. Provide enough detail that users can determine when to select the rule.
Active	Option for activating or deactivating a delegation rule.
Table	Type of records you want your delegate to access. Each delegation rule only applies to one table and does not apply to table extensions. Create a delegation rule for each table you want to grant a delegate access to.
Conditions	Filter applied to records in the table. Delegates can only access records that match these conditions. **Note:** When defining conditions like case sensitivity or null values, see APIGlideFilter - Scoped, Global.

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Field	Description
Approvals	Option to delegate approvals. Approval authority allows a delegate to approve or reject approval requests.
Assignments	Option to delegate assignments.

4. Select **Save** or **Submit**.
   The **Delegation Rule** list returns with the **Delegates**, **Delegator User Criteria**, and **Delegate User Criteria** tabs.

   Note: If there are delegates using the rule, you cannot delete it and can only edit the **Name** and **Short description** fields.

   The **My Delegates** widget on the Employee Center does not appear unless there is an active delegation rule.

5. Select the **Delegates** tab.
   Admins see a list of all delegates. You can select a delegate from the list and edit the start and end dates, notifications, and current delegation rules.
6. Select the **Delegator User Criteria** tab to further define who can be a delegator.
7. Select **Edit**.
8. Use condition filters and you can select types of users that can be delegators for the delegation rule.
   For example, you can select **Active is true** and move **Managers** from the **Collection** column to the list on the right. This condition determines only active managers are eligible to be a delegator.
9. Select **Save**.
10. Select the **Delegate User Criteria** tab to further define who can be a delegate.
11. Select **Edit**.
12. Use condition filters to select types of users that can be delegates for the delegation rule.
    For example, you can select **Active is true** and move **Users with 'sn_hr_core.case_writer' role** from the **Collection** column to the list on the right. This condition determines only users with the HR case writer role can be a delegate.
13. Select Save.
    The **Delegation Rule** form returns.
14. Select **Update**.

What to do next

Organize the delegation rules into categories to make delegating large batches of tasks easy and efficient for your employees. See Create delegation rule categories.

Delegate assigned tasks for a specific period of time. See Create a delegate.

Employees can now delegate their assigned tasks to other employees. See Delegate on-demand tasks.

Create delegation rule categories

Create categories or sets of granular delegation rules that make delegating large batches of tasks easy and efficient for your employees.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Granular Delegation** > **Delegation Rule Categories**.
2. Click **New**.
3. On the form, fill in the fields:

Delegation Rule Category form

Field	Description
Name	Label for the delegation rule category.
Application	Application associated with the delegation rule. This field is not editable and shows the application of your correct scope.
Active	Option for activating or deactivating a delegation rule category.

4. Select **Save** or **Submit**.
   If you select **Submit**, click the delegation rule category to edit it.
5. Create or assign existing delegation rules to the delegation rule category:
   - Under the Delegation Rule tab, click **New**. Follow the steps to Create delegation rules.
   - Click **Edit** to select from existing delegation rules.
6. Click **Update**.

What to do next
Delegate assigned tasks for a specific period of time. See Create a delegate.

Employees can now delegate their assigned tasks to other employees. See Delegate on-demand tasks.

Create a delegate

Delegation admins (delegation_admin) can delegate tasks from one employee to another using **Granular Delegate**.

Before you begin
Role required: delegation_admin

Ensure that the delegate user (the person to whom tasks will be reassigned) has the necessary roles to complete those tasks.

Procedure

1. Navigate to **All** > **Granular Delegation** > **Create New Delegate**.
2. Fill in the form.

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Granular Delegate

Field	Description
User	User (delegator) who delegates service tasks to a delegate.
Starts	Date when service delegation begins.
Delegate	User authorized as delegate.
Ends	Date when service delegation ends.
All notifications	Option to send the delegate a copy of all notifications you receive during the delegation period. Select this option when you want the delegate to receive the delegation notification. For example, you want the delegate to receive notifications about activity stream or record updates. It is set to False by default to avoid concerns around getting notifications that has critical and sensitive data. **Note:** Notifications with the **Exclude Delegates** option enabled override the True setting of this option. Use the **Exclude Delegates** option to prevent delegates from seeing confidential or protected information.
Meeting invitations	Option to forward delegates meeting invitations. Select this option to forward the delegate any meeting invitations the instance generates or receives for you. It is set to False by default.

3. Select **Save**.
   The **Delegation Rules** related list appears.
4. Select **Edit** to assign delegation rules to a delegate.
   You can use condition filters to search for delegation rules.
5. Select delegation rules under the **Collection** column you want to assign to a delegate and move them to the **Delegation Rules List** column.
6. Select **Save**.
   The **Granular Delegate** form returns.

Using Granular Delegation

Employees can use Granular Delegation to delegate their tasks to another eligible employee.

Delegate on-demand tasks

You can delegate an assigned task to another employee from your Employee Center.

Before you begin
Role required: none

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You can also delegate an assigned task from the ServiceNow® mobile. For more information, see Using granular delegation on ServiceNow mobile.

Note: You must create delegation rules before you can delegate on-demand tasks. For more information, see Create delegation rules.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select your login name or picture at the top, right corner.
3. Select **Profile**.
4. Scroll down to the **My Delegates** section and select the **Add Delegate** button.
5. Fill in the form.

Select a delegate and duties

Field	Description
Delegate	The name of the person you are delegating your tasks to.
Start date	Select the **Show calendar** icon () and select the date you want delegations to start.
End date	Click the **Show calendar** icon () and select the date you want delegations to end.
Duties	Select the duties you want to assign to the delegate for the time period you select. If your admin organized the duties into categories, the categories are listed before the individual duties. When you select a category, all of the duties in that category are selected.

Note: Setting up delegation does not automatically delegate the existing active tasks of delegator prior to the delegation start date. Tasks are delegated only in the following cases:

- A new case is assigned to the delegator between the delegation start and end dates.
- An existing case of the delegator updated during the delegation period.

6. Select **Submit**.

Note: You can also navigate to **Granular Delegation** > **My Delegates** and select **New**, or **Granular Delegation** > **Create New Delegate** to assign your tasks to another employee. For more information, see View my delegates.

7. Select the edit icon, then select **Remove delegate** to remove the delegate
8. Select the down arrow icon [ to view a list of delegates you have assigned your tasks to.
9. Select the edit icon to remove delegates when you have multiple delegates.

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View my delegates

Use the **Granular Delegates** list to view a list of employees that you have delegated your tasks to. You can also delegate your tasks to another employee as an alternative to using the Employee Center.

Before you begin

- Role required: any role with access to task tables such as HR Task [sn_hr_core_task]
- Create one or more Delegation Rule records
- Verify that your delegate has access to the records specified by your delegation rules

Note: Admins can use the **Create New Delegate** form to assign tasks from a delegator to a delegate. For more information, see Create a delegate.

Procedure

1. Navigate to **All** > **Granular Delegation** > **My Delegates**.
2. Click **New**.
3. On the form, fill in the fields:

Delegate form

Field	Description
User	User (delegator) who delegates service tasks to a delegate.
Delegate	User you want to delegate tasks to.
Starts	Date when service delegation begins.
Ends	Date when service delegation ends.
All notifications	Option to send the delegate a copy of all notifications you receive during the delegation period. Select this option when you want the delegate to receive the delegation notification. For example, you want the delegate to receive notifications about activity stream or record updates. It is set to False by default to avoid concerns around getting notifications that has critical and sensitive data. **Note:** Notifications with the **Exclude Delegates** option enabled override the True setting of this option. Use the **Exclude Delegates** option to prevent delegates from seeing confidential or protected information.
Meeting invitations	Option to forward delegates meeting invitations. Select this option to forward the delegate any meeting invitations the instance generates or receives for you. It is set to False by default.

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4. Select **Save**.
5. From the **Delegation Rules** related list, select **Edit**.
6. Select the delegation rules records you authorize this delegate to have.
7. Select **Save**.
   The **Granular Delegate** form returns.
8. Select **Update**.

View delegations assigned to me

Use **Granular Delegates** list to view granular delegate records for the logged in user or employees that have delegated tasks to you.

Before you begin

- Role required: any role with access to task tables such as HR Task [sn_hr_core_task]
- Create one or more Delegation Rule records
- Verify that your delegate has access to the records specified by your delegation rules

Procedure

1. Navigate to **All** > **Granular Delegation** > **Delegated to Me**.
   A list of delegation records assigned to you appears.
2. To view a delegation record, select the date link under the **Starts** column.
3. To view the user record of the delegator, select the user link under the **User** column.
4. To create a new the delegation, select **New**.
5. Fill in the form.

Granular Delegate

Field	Description
User	Logged in user (delegator) who delegates service tasks to a delegate.
Starts	Date when service delegation begins. The default is the current date and time.
Delegate	User you want to delegate tasks to. **Note:** The default value is the logged in user. You need to change this to the user you are delegating tasks to.
Ends	Date when service delegation ends.
All notifications	Option to send the delegate a copy of all notifications you receive during the delegation period. Select this option when you want the delegate to receive the delegation notification. For example, you want the delegate to receive notifications about activity stream or record updates. It is set to False by default to avoid concerns

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Field	Description
	around getting notifications that has critical and sensitive data. **Note:** Notifications with the **Exclude Delegates** option enabled override the True setting of this option. Use the **Exclude Delegates** option to prevent delegates from seeing confidential or protected information.
Meeting invitations	Option to forward delegates meeting invitations. Select this option to forward the delegate any meeting invitations the instance generates or receives for you. It is set to False by default.

6. Select **Save**.
   The **Delegation Rules** related list appears.
7. Select **Edit** to assign delegation rules to a delegate.
   You can use condition filters to search for delegation rules.
8. Select delegation rules under the **Collection** column you want to assign to a delegate and move them to the **Delegation Rules List** column.
9. Select **Save**.
   The **Granular Delegate** form returns.

Using granular delegation on ServiceNow® mobile

You can use Granular Delegation to delegate tasks from ServiceNow® mobile.

To delegate your tasks using the ServiceNow® mobile:

- Select your HR profile
- Add a delegate
- Add details of the delegation
- Submit the delegation

For more information on the ServiceNow® mobile application, see ServiceNow Mobile.

Delegate tasks using the ServiceNow® mobile

You can delegate tasks to other eligible users from the ServiceNow® mobile.

Before you begin

Role required: sn_hr_core.case_writer

Procedure

1. Navigate to the **All** > **ServiceNow mobile home page**.
2. Select the HR profile icon in the top, right corner.

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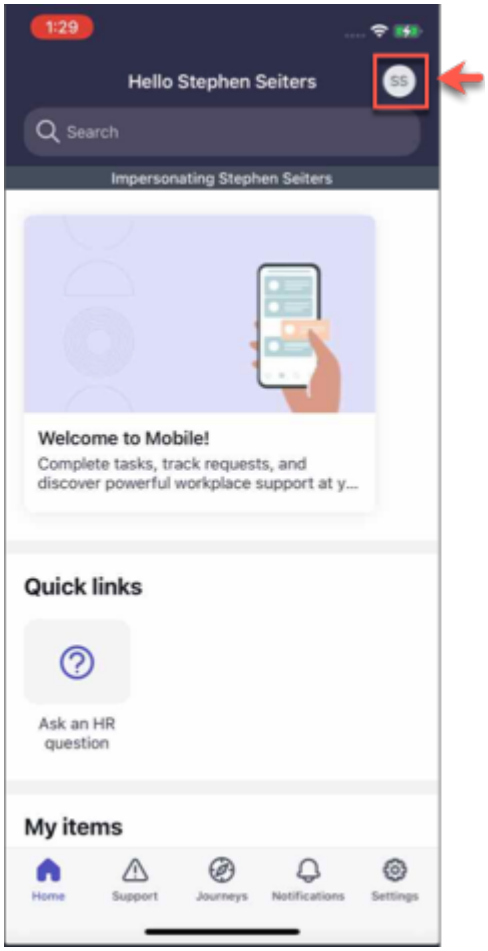
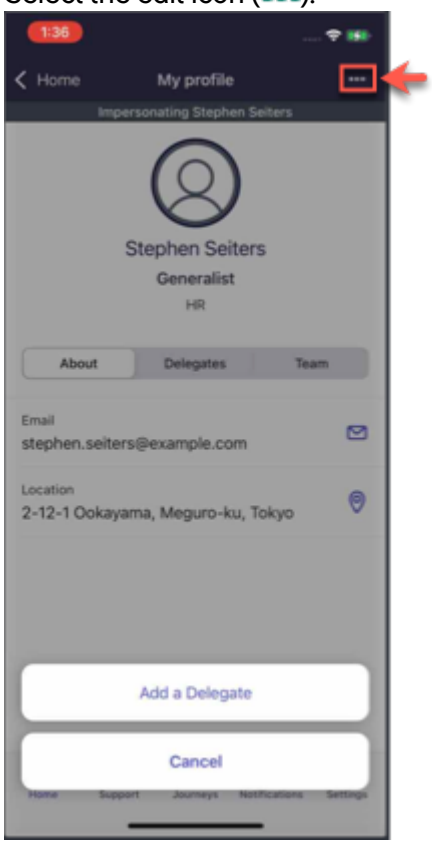


3. Select the edit icon (▪▪▪).



4. Select the **Add a Delegate** button.

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5. Fill in the form.

Granular Delegation mobile form

Field	Description
Delegate	Person authorized as a delegate. Select a person you want to delegate your duties to.
Start date	Date when the service delegation begins.
End date	Date when the service delegation ends.
Duties	The duties you want to delegate. A list of duties appears after you select **Duties**. Select the duties you want to delegate and a check mark appears next to the duty.

6. Select **Submit**.
   Your Employee Profile appears. To see a list of people you have delegated tasks to, select the **Delegates** tab.

View tasks delegated to you on the ServiceNow® mobile

You can use the ServiceNow® mobile to view tasks delegated to you.

Before you begin

Role required: sn_hr_core.case_writer

Notification of delegated tasks are sent to your email address if your HR profile contains that information. For more information, see HR Profile.

Note: If your company uses Connect, you can choose what notifications you receive. For more information on notifications, see Enable or disable Connect notifications globally.

Procedure

Navigate to the mobile **All** > **Home** > **My Tasks**.
A list of tasks delegated to you appears.

Health and Safety

ServiceNow Health and Safety enables businesses to ensure safe and healthy working conditions for their employees.

This video shows a visual overview of ServiceNow Health and Safety and its capabilities.

https://player.vimeo.com/video/1012534924?h=ce4c8293c8&badge=0&autopause=0&player_id=0&app_id=58479

To deliver on Environmental, Social, and Governance (ESG) goals, companies must correctly record, track, and report on health and safety related employee incidents. ServiceNow Health and Safety provides at-your-fingertips capabilities such as reporting incident and observation and filing job safety analysis (JSA) and a one-stop-shop for all safety knowledge in your

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company. Further, it also provides the tools to reduce safety incidents, keep the costs down, and assess and manage risks.

Health and Safety applications

Health and Safety includes the following applications:

Health and Safety Incident Management

The ServiceNow® Health and Safety Incident Management application is a solution in Health and Safety that enables organizations to record, track, and report on health and safety related employee incidents and observations. Furthermore, it provides capabilities to investigate and reduce incidents.

Health and Safety Incident Management OSHA Content Pack

With the ServiceNow® Health and Safety Incident Management OSHA Content Pack application, you can automatically fill and export OSHA forms for injuries and illnesses that happened in an establishment under your organization.

Health and Safety Case Management

The ServiceNow® Health and Safety Case Management application provides capabilities to support employees' health and safety inquiries and their return to work after an injury or illness.

Health and Safety Contractor Management

The ServiceNow® Health and Safety Contractor Management application provides capabilities to manage contractor companies and workers for their health and safety.

Contractor Service Center

The ServiceNow®Contractor Service Center application provides contract workers with a dedicated portal to complete pre-qualification tasks, submit safety documentation, report Health and Safety incidents and observations, submit job safety analyses, and request permits to work.

Health and Safety Risk Management

The ServiceNow® Health and Safety Risk Management application provides capabilities to enable workers, line managers, and safety personnel to work safely and reduce the likelihood of injuries that risks or hazards create.

Health and Safety Environmental Management

The ServiceNow® Environmental Management application helps in the management of chemicals in an organization by maintaining the chemical inventory, ensuring regulatory conformance, and reducing the manual effort associated with chemical documentation and workflows.

Now Assist for Health and Safety

Now Assist brings generative AI to the Health and Safety with capabilities such as conversational incident reporting and incident summarization. It also uses agentic workflows to analyze incident data, identify patterns, and generate corrective and preventive action plans, empowering safety teams avoid future incidents."

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

Mobile experience for Health and Safety

You can use ServiceNow® Now Mobile app to work on the Health and Safety applications.

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For more information, see Mobile experience for Health and Safety.

Domain separation for Health and Safety applications

The Health and Safety applications support domain separation at basic level. For more information, see Domain separation and Health and Safety Incident Management and Domain separation and Health and Safety Risk Management. For a deeper understanding of the support levels, see Application support for domain separation.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Integration with Third-party services

You can find the Health and Safety applications that offer third-party service integrations to extend their capabilities and enhance functionality. For more information, see Integration of Health and Safety applications with third-party services.

Health and Safety Core

The ServiceNow® Health and Safety Core application provides the data model that is required for consistent employee and operational experiences in Health and Safety.

Get started

Explore



Learn how different personas use Health and Safety Core.

Set up



Set up Health and Safety Core.

Use



Manage safety meetings, safety actions, and safety documents.

Reference



Get details about components such as roles, tables, plugins, and store applications that are installed.

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Health and Safety Core overview

The Health and Safety Core data model supports the functionality of the following Health and Safety applications.

- Health and Safety Incident Management
- Health and Safety Contractor Management
- Health and Safety Case Management
- Health and Safety Risk Management

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Exploring Health and Safety Core

Health and Safety Core enables the organizations to streamline and automate essential business functions across the Health and Safety applications.

Health and Safety Core overview

The Health and Safety Core application provides the core date model for Health and Safety. This data models consists of common components and data structure to enable the functioning of related Health and Safety applications.

- Health and Safety Workspace is used by safety agents to perform their safety tasks. All health and safety applications that are installed use the Health and Safety Workspace.
- Health and Safety dashboard provides a centralized overview of your organization's safety performance. It helps safety teams monitor, analyze, and manage key safety metrics such as incidents, injuries, risks, and corrective actions across various locations and time periods.
- Health and Safety user profile provides safety teams access to all the information associated with health and safety records in a central location.
- Safety teams can manage safety meetings and tasks such as scheduling a meeting or recording notes.
- Report field mapping enables the safety agents to generate PDF reports for the records.
- Health and Safety documents enable the safety teams to view documents associated with a safety record.
- Health and Safety action scheduler helps to create scheduled actions across the organization.

User Personas

Health and Safety Core is aimed at the following personas:

Benefits and user personas

Benefits	Feature	User
Access the workspace to process safety records.	Health and Safety Workspace	Safety agents

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Benefits and user personas (continued)

Benefits	Feature	User
Get insights into key safety metrics with a centralized interface.	Health and Safety dashboard	Safety team
Access the user information in one central location.	Health and Safety user profile	Safety team
Create safety report field mapping to map fields in your reporting PDF template to the corresponding fields in the Health and Safety records.	Report field mapping	Safety report mapping manager
Log and track the meetings in the Health and Safety application.	Safety meetings	Safety meeting manager
Create an action schedule to schedule actions across the organization.	Health and Safety action scheduler	Safety agents
Create and manage safety knowledge articles.	Safety knowledge articles	Safety manager

Health and Safety Workspace

The Health and Safety Workspace provides a single location for safety teams to process safety records. Agents can use it to manage incidents, risks, contracts, or cases depending on the applications installed.

Workspace users

The following users can use the Health and Safety Workspace. The workspace is personalized for different roles.

Workspace users

User	Description
Safety manager	Keeps track of safety frequency rates and assigns safety tasks to safety agents.
Safety agent	Works on incidents, observations, corrective and preventive actions, and conducts investigations.
Safety operations manager	Accesses Health and Safety operations landing page to report safety incidents and observations.
Safety compliance manager	Manages the establishments list and the generation of reports such as OSHA forms.
Executive	Views the Health and Safety executive landing page to gain insight into company's safety metrics.

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Workspace users (continued)

User	Description
Application admin	Configures the workspace as per business requirements. For more information, see these links: • Configure a workspace in Workspace Builder • Next Experience UI Builder

Accessing the workspace

To open the workspace, navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.

The Health and Safety Workspace opens in a new tab of the browser window.

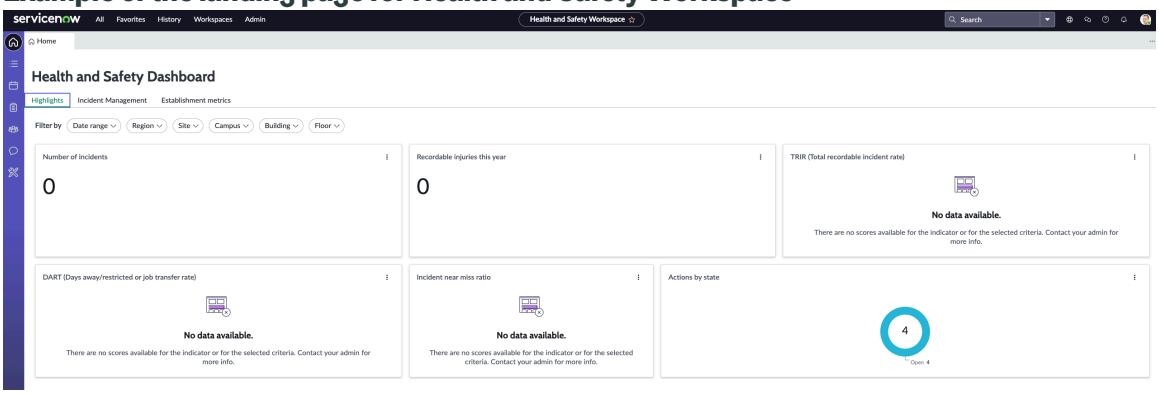
Landing page

On the workspace landing page, the Health and Safety dashboard gives a quick overview of the widgets under the **Highlights** tab showing metrics and scores based on the Health and Safety applications installed. You can monitor the status and explore each component to see the list behind the score in these widgets. The widgets also help you and your team to monitor your workload, focus on high-priority items, and easily manage your responsibilities.

Note: The widgets and the data that are displayed in the widgets depend on your role.

The following is an example of the workspace landing page for the Health and Safety Core where the Health and Safety Incident Management application is installed.

Example of the landing page for Health and Safety Workspace



Primary navigation

The primary navigation displays icons for the installed Health and Safety applications. Clicking on these icons takes you to the list view for each application. For example, if you have the Health and Safety risk management application installed, then you can view the risk related records by clicking the **Risk management** icon .

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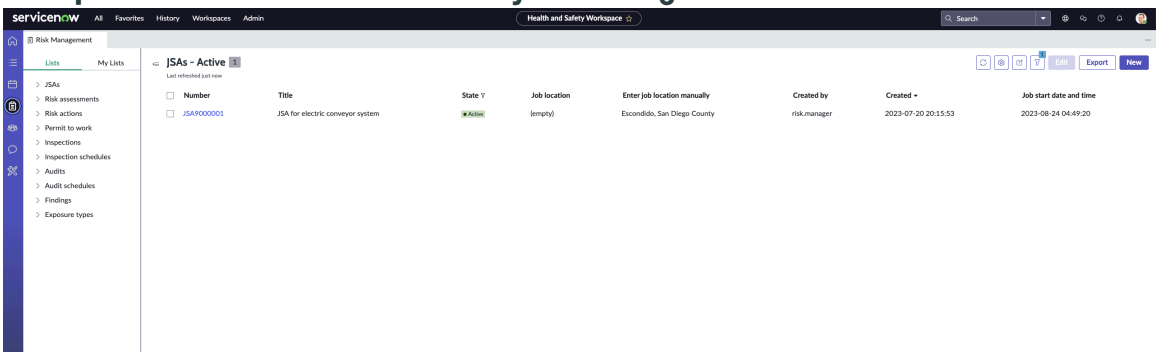
Example of list view for health and safety risk management



Health and Safety user profile

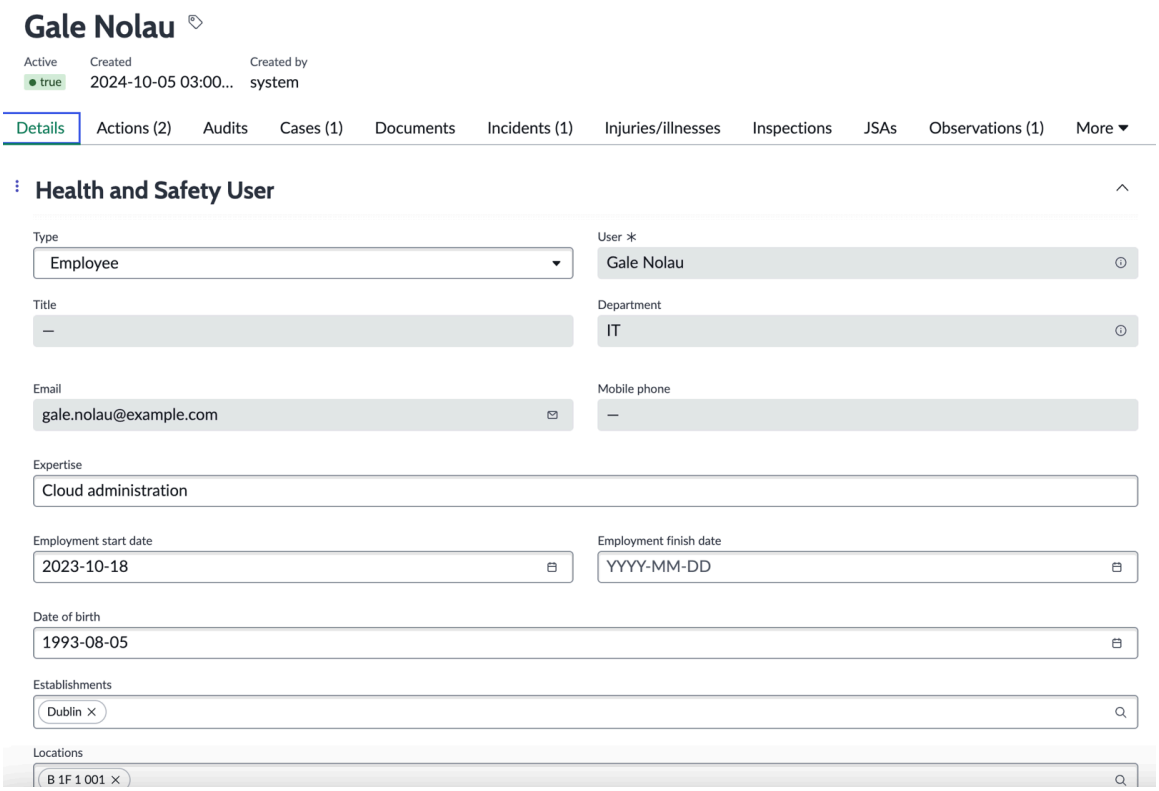
A Health and Safety profile provides safety team with all the information about a user in one central place.

It enables them to access all safety-related information about users (including employees, visitors, and contractors) in the organization. They can see safety training records of workers and can easily track who is trained in what, and view safety incidents and other safety-related records associated with them.

Overview of a Health and Safety profile

The following image shows an example profile of a Health and Safety user.

Example Health and Safety profile



The **Details** tab displays key information about the user such as their expertise, location, and employment start date.

The profile also shows the following health and safety-related records associated with the user in the respective tabs.

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- Actions that are assigned to the user
- Audits the user is involved in
- Cases opened by the user
- Documents that are associated with the user
- Exposures the user is affected by
- Incidents the user is involved in
- Injury and illnesses where they user is injured
- Inspections the user is assigned
- Job safety analyses (JSAs) the user is involved in
- Observations the user is involved in
- Risk Assessments the user is involved in
- Site access the user is involved in

The tabs in a profile appear based on the installed Health and Safety applications.

Accessing Health and Safety profile

To open the Health and Safety profile for a user,

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the configuration icon () and select the **Health and safety profiles** list.

Assigning Health and Safety profile

- To assign Health and Safety profile for a user, see Assign Health and Safety profile to a user.
- To assign Health and Safety profile for a contract worker, see Assign Health and Safety profile to a contractor worker.

Setting up Health and Safety Core

You can set up your implementation for the Health and Safety Core data model by installing the data model and reviewing and configuring the components that are installed with the data model.

Install Health and Safety Core

You can install the Health and Safety Core (sn_ohs_im) if you have an admin role. This data model includes demo data and installs related ServiceNow® Store plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Core application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Health and Safety Incident Management:

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- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Health and Safety Core.

This table lists the optional applications that can be installed for additional features:

Optional applications for additional features in Health and Safety Core

Application	Description
Geo map component [sn_geo_map]	Provides access to enable the map component in the Health and Safety Workspace from the application properties. To install, see Activate a plugin
Geolocation plugin [com.snc.geolocation]	Enables geolocation feature on the Now Mobile app and gives access to manual tracking options. For more information, see Enabling and selecting location tracking options
Learning Core [sn_lc]	Installs Learning Core to enable learning content in Health and Safety actions. For more information, see Configuring Learning Core.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Core application (sn_ohs_im) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Workplace location data

In the Workplace Core application, set up data related to your workplace locations so you can select a location in your safety records, for example, your safety incidents and observations.

Before you begin

Role required: sn_wsd_core.admin

Procedure

Configure the workplace locations.
For more information on what you can configure, see Providing your workplace data.

Result

The **Location** field on safety forms, for example, incidents and observations, shows the configured workplace locations.

Enable a Health and Safety table for configuring report field mapping

Enable a Health and Safety table for report field mapping. You can then configure its mapping with your reporting PDF template, enabling safety agents to generate reports for records in this table.

Before you begin

Verify that the application scope is selected as Health and Safety Core. For more information, see Application picker.

Role required: sn_ohs_im.admin

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the property *Report field mapping tables*, add the table name, for example, `sn_ohs_im_action`, to enable it for report field mapping. `sn_ohs_im_incident`, `sn_ohs_im_observation`, and `sn_ohs_im_injury_illness` tables are set as default value in this property.
3. Select **Save**.

Result

- The table is available in the **Mapping table** field when configuring a report field mapping for this table.
- The **Generate report** button becomes available in all records for this table.
- Once a report field mapping is set up for this table, the **Generate report** button becomes available for all its records.

What to do next

To generate a report for this table's records, you must configure its report field mapping. For more information, see Create a safety report field mapping for generating reports.

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Create a safety report field mapping for generating reports

Create a safety report field mapping to map fields in your reporting PDF template to the corresponding fields in the Health and Safety records.

Before you begin

- The imported reporting PDF template, that you want to create the mapping for, must be fillable.
- The Health and Safety table to be mapped is enabled for report field mapping. For more information, see Enable a Health and Safety table for configuring report field mapping.

Role required: sn_ohs_im.report_mapping_manager

About this task

The report field mapping enables you to do the following:

- Import your own PDF templates that you need to use for reporting such as for regional conformance or industry-specific needs.
- Map the fields in your reporting PDF template with the fields in safety records, such as an incident, observation, and injury and illness.
- Using the PDF template, generate reports from safety records with fields auto-populated, making the reporting process more efficient.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the configuration icon ().
3. In the **Configuration** tab, select **Report field mappings** and then **All**.
4. Create a report field mapping or modify an existing one.
   - To create a report field mapping, select **New**.
   - To review an existing one, open the one that you want to configure.
5. On the form, fill in the fields.
   For information on form field descriptions, see Health and Safety report field mapping form.
6. Select **Save**.
   The **Form field mapping** tab appears. The **Field mappings** section shows all fields extracted from the imported PDF. A preview of the attached PDF is available alongside the **Field mappings**.
7. In the **Field Mappings** section, map Health and Safety fields to each field extracted from the PDF.

   Tip: In the PDF preview, select a fillable field to highlight the corresponding field in the Field Mappings list. Alternatively, select a field in the Field Mappings list and it's highlighted on the PDF preview.

Option	Steps
Using the Health and Safety field list	In the list available with each field name, se lect a Health and Safety field to map to. The list displays fields from the selected Health and Safety mapping table. However, dot-walk fields are also available to select from the field mapping list to map fur

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Option	Steps
	ther reference fields. For information on dot-walking, see Dot-walking to data in related ta
Using a custom script	Select the more options icon (⋮) beside the field mapping and then select **Add script**. The **Edit script** dialog box includes a few ex amples for your reference. You must provide the correct table, field names, and so on, in your script, and modify as you require for the mapping. **Note:** This scripting is done within the Health and Safety application scope. Each mapping can be scripted using the script capability on each field. It enables the field to be mapped in a certain way using a custom logic or perform any type of data transformation on the field value, as needed.

8. Check that the field mappings are active.

   To deactivate a field mapping, select the more options icon (⋮) beside the field mapping and then select **Deactivate**.
9. Select **Save**.

Result

- The fields in the imported reporting PDF template are mapped to the fields in the selected mapping table.
- The published report field mapping is available to select during a report generation in the mapped safety table records. For example, see Generate a report for a safety incident, observation, or injury.

Configure groups for Health and Safety

Configure user groups for Health and Safety for assignment of safety records. You can assign roles to groups to provide access to all group members or assign roles to individual users.

Before you begin

Role required: sn_ohs_im.admin and admin

About this task

User groups are used across most processes in the ServiceNow AI Platform for assigning work to teams and requesting approvals.

Any rule that is applied to a group is automatically assigned to group members. For example, roles and assignment rules applied to a group are automatically assigned to group members.

The following groups and their related roles are installed by default as part of the Health and Safety applications regardless of whether demo data is installed:

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- Health and Safety Meeting Managers
- Health and Safety Meeting Minute Takers
- Health and Safety Agents
- Health and Safety Meeting Sensitive Content Group

These groups are available for assignment.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Create a group or modify an existing group.
   - To create a group, select **New**.
   - To review an existing group, open the group that you want to configure.
3. On the form, fill in the fields.
   For detailed instructions and field descriptions, see Create a user group.
4. Select **Submit** or **Update**.

What to do next

- Assign roles to the group. For more information, see Assign a role to a group.
- Add users to the group.

Configure scheduled job to generate frequency rates

Configure the scheduled job to load the safety frequency rates and ensure that the safety metrics on the Health and Safety Workspace landing page are up to date.

Before you begin

Ensure that the application scope is selected as Health and Safety Incident Management PA Content Pack. For more information, see Application picker.

Role required: sn_ohs_im.admin

About this task

The *[OHS] Safety Metrics* job is set to run daily by default.

Procedure

1. Navigate to **All** > **Performance Analytics** > **Jobs**.
2. Search and open the *[OHS] Safety Metrics* scheduled job.
3. In the **Run** field, set the frequency of the scheduled job.
4. To activate the scheduled job, select the **Active** check box.
5. Select **Update**.

> **Note:** To run the scheduled job and update metrics on demand, select **Execute Now**.

Assign Health and Safety profile to a user

Assign the Health and Safety profile to all users in your organization, including employees, visitors, and contractors.

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Before you begin
Role required: sn_ohs_im.hs_profile_writer

About this task
For more information on Health and Safety user profiles, see Health and Safety user profile.

Note: The **Generate Health And Safety Profiles** scheduled job runs weekly and automatically creates health and safety user profiles for users [sys_user] with an assigned role in any of the Health and Safety applications.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the configuration icon ( ).
3. In the **Lists** tab, select **Health and safety profiles** and then **All**.
4. Select **New**.
5. On the form, fill in the fields.
   For information on form field descriptions, see Health and Safety profile form.
6. Select **Save**.

Result
- The user is listed in the **Health and safety profile** list under **Configuration** on the Health and Safety Workspace.
- The user profile is saved in the Health and Safety profile [sn_ohs_im_health_and_safety_profile] table.

Add a Health and Safety visitor

Create a record for a Health and Safety visitor so that they can be easily referenced in the **Visitor** field on related records.

Before you begin
Role required: sn_ohs_im.hs_profile_writer

About this task
A visitor is a person from outside the organization who came to visit the site.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the configuration icon ( ).
3. In the **Configuration** tab, select **Health and safety visitors** and then **All**.
4. Select **New**.
5. On the form, fill in the fields.

Health and Safety visitor form

Field	Description
First name	Visitor's first name.
Middle name	Visitor's middle name.

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Field	Description
Last name	Visitor's last name.
Visitor ID	System-generated ID for the visitor.
Phone number	Visitor's contact number.
Company	Organization that the visitor works for.
Email	Visitor's email address.

6. Select **Save**.
   A Visitor ID is generated for the visitor.
7. Assign the Health and Safety user profile to the visitor record.

   For more information, see Assign Health and Safety profile to a user.

   Note: Only a visitor with the assigned Health and Safety profile is available to select in the **Visitor** field on a form.

Result

- The visitor is listed in the **Health and safety visitors** list under **Configuration** and is saved in the Health and Safety visitor [sn_ohs_im_health_and_safety_visitor] table.

  Note: If the Workplace Visitor Management (com.sn_wsd_visitor) application is also installed on your instance, then the list of WSD visitors from the Visitor [sn_wsd_visitor_visitor] table is automatically synchronized with the Health and Safety visitors list in the Health and Safety visitor [sn_ohs_im_health_and_safety_visitor] table. So, the WSD visitors also show up in the **Health and safety visitors** list and should be assigned the Health and Safety user profile.

- The visitor's Health and Safety user profile is saved in the Health and Safety profile [sn_ohs_im_health_and_safety_profile] table.
- The visitor is available to be referenced in the **Visitor** field on Health and Safety records such as safety incidents that the visitor is involved in.

Migrate existing safety documents to the Document library

Migrate your existing safety documents from the deprecated **Standards and Documents** list to the new **Health and Safety document library** list.

Before you begin
Role required: sn_ohs_im.admin

About this task
To securely maintain version control of safety documents across multiple languages and locations, Health and Safety applications now use the ServiceNow® Document Management (com.snc.platform_document_management) plugin. The previous **Standards and Documents** list and its associated table [sn_ohs_im_document] have been deprecated.

Use the Document Migration tool to seamlessly move your existing safety documents from the deprecated table to the new **Health and Safety document library** list. This new list is based on the Health and Safety document [sn_ohs_im_document_v2] table. The tool supports batch migration of up to 200 records at a time. After migration, all documents can be efficiently managed within the new list.

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Procedure

1. Navigate to **All** > **Health and Safety** > **Standards and documentation (Deprecated)** > **Document migration**.
2. Select **Health and Safety document (Deprecated)** (sn_ohs_im_document) and then select **Migrate records**.
   A batch of up to 200 documents are migrated and listed in the **Migration records** list.
3. Repeat step 2 until you have migrated all existing document records.

Result

- All migration records with their migration status and logs are listed in the **Migration records** list.
- The count of documents that have successfully migrated, documents pending migration, and failed migration are listed in the **Migrated records**, **Remaining records**, and **Fail records** widgets.
- The successfully migrated records appear in the new **Health and Safety document library** list under **Configuration**, and are saved in the Health and Safety document [sn_ohs_im_document_v2] table.

  For information on storing safety-related documents, see Add a new Health and Safety related document.

Using Health and Safety Core

Learn how the Health and Safety Core data model provides capabilities to manage safety meetings, schedule safety actions, and manage and monitor safety records.

Managing safety meetings

Safety meeting management provides the safety team and safety meeting manager with a structured way to manage safety meetings, including tasks such as scheduling, tracking actions, and recording notes.

Key features of safety meeting management

- Schedule different types of safety meetings for all person types-including employees, visitors, and contractors.
- Add multiple attendees using a condition builder
- Log meeting minutes and actions.
- Flag meetings and minutes as sensitive.

Log a safety meeting

Log a safety meeting and keep a track of it in the Health and Safety application.

Before you begin

Role required: sn_ohs_im.meeting_manager or sn_ohs_im.meeting_writer

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the meetings icon ().
3. In the **Meetings** tab, select **Meetings** and then **All**.

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4. Create a meeting or open an existing one.
   - To create a meeting, select **New**.
   - To open an existing meeting, select the one that you want to track. Alternatively, to quickly edit the meeting, select the edit icon () in the list and start updating the meeting in the side panel.
5. On the form, fill in the fields.
   For field descriptions, see Health and Safety meeting form.
6. Select **Save**.
   The **Attendees**, **Meeting minutes**, **Documents**, and **Actions** tabs appear for this meeting.
7. In the **Attendees** tab, select **Add** or **New** to add attendees for this meeting.
   For more information, see Add attendees to a safety meeting.
8. **Optional:** In the **Documents** tab, add any documents that cover topics to be discussed or shared in this meeting.
   - Select **Add** to link an existing document stored in the **Health and Safety document library** list.
   - Select **New** to upload a new document.

   For information on storing documents in the Health and Safety Workspace, see Add a new Health and Safety related document.
9. **Optional:** In the **Actions** tab, select **New** to add any actions for the safety meeting.
   For field descriptions, see Health and Safety action form.

Result

- The safety meeting is listed in the **Meetings** list in the Health and Safety Workspace and is saved in the Meeting [sn_ohs_im_meeting] table.
- The documents associated with this meeting are saved in the Health and Safety document [sn_ohs_im_document_v2] table.

What to do next

In the **Meeting minutes** tab, meeting minutes taker can add minutes of this meeting to track discussions and add any actions for the recorded minutes. You can add as many meeting minutes to a safety meeting as needed. For more information, see Create a meeting minute for a safety meeting.

Add attendees to a safety meeting

Add users to a safety meeting who need to attend this meeting.

Before you begin

Role required: sn_ohs_im.meeting_manager or sn_ohs_im.meeting_writer

About this task

Using the **Attendees** tab of a safety meeting, you can keep track of all attendees and absentees for the meeting in the same place.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the meetings icon ().
3. In the **Meetings** list, select the one that you want to add attendees to.
4. In the **Attendees** tab, select **Add** or **New** to add attendees for this meeting.

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Option	Steps
To add multiple attendees	Add users with the Health and Safety profile in your organization who are attending this meeting. **a.** Select **Add**. **b.** Select **Filter** and use the condition builder to define conditions to choose users to be added as attendees. **c.** Select users in the list and then select **Add**. For information on Health and Safety profile, see Health and Safety user profile.
To add an external attendee or a single internal attendee	**a.** Select **New**. **b.** On the form, fill in the fields. For field descriptions, see Health and Safety meeting attendee form. **c.** Select **Save**.

Result

- The attendees are listed in the **Attendees** tab of the meeting and are saved in the Health and Safety meeting attendee [sn_ohs_im_meeting_attendee] table.
- For an attendee internal to your organization, the **Attendee profile** column of this list shows the user's Health and Safety profile.
- For an external attendee, the **Attendee profile** column of this list is empty.

Create a meeting minute for a safety meeting

Create a meeting minute for a safety meeting to track discussions and accountability.

Before you begin

Verify that the minute taker is added as an attendee to this safety meeting. For information on adding a meeting attendee, see Add attendees to a safety meeting.

Role required: sn_ohs_im.meeting_minute_taker

About this task

You can create multiple meeting minutes for different timestamps of a safety meeting. For each minute record, you can add relevant actions to ensure safety concerns are addressed and contributors remain accountable.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the meetings icon ( ).
3. In the **Meetings** list, select the one that you want to create meeting minutes for.
4. In the **Meeting minutes** tab, select **New**.
5. On the form, fill in the fields.

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Safety meeting minute form

Field	Description
Short description	Brief description about this meeting minute.
Time stamp	Time of the discussion during the meeting.
Contributors	Attendees involved in this discussion.
Sensitive content	Option to indicate that this meeting minute contains sensitive information. Only a user with the Sensitive meeting content user [sn_ohs_im.sensitive_meeting_content_user] role can view a meeting minute marked as sensitive. **Note:** Selecting a meeting minute as sensitive content doesn't mark the entire safety meeting or the other meeting minutes for this meeting as sensitive.
Topic discussed	Description about the topic discussed.

6. Select **Save**.
   The **Actions** tabs appear for this meeting
7. **Optional:** In the **Actions** tab, assign any actions related to this meeting minute.
   - To create an action, select **New**.
   - To associate an action from the existing list of actions for this meeting, select **Add**.

   For field descriptions, see Health and Safety action form.

Result

- The meeting minute is listed in the **Meeting minutes** tab of the meeting and is saved in the Health and Safety meeting minute [sn_ohs_im_meeting_minute] table.
- Any action for this meeting minute is listed in the **Actions** tab of the minute record. The action is saved in the Health and Safety m2m meeting minute action [sn_ohs_im_m2m_meeting_minute_action] table.

Scheduling Health and Safety actions

Use the Health and Safety action scheduler to create and schedule actions across the organization and auto-assign them to specific individuals using the condition builder.

Create a Health and Safety action schedule

Create an action schedule to schedule actions across the organization such as learning activities and recurring tasks.

Before you begin

Role required: sn_ohs_im.agent

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About this task

The action scheduler uses the condition builder to create and assign actions to individuals based on specified conditions.

Procedure

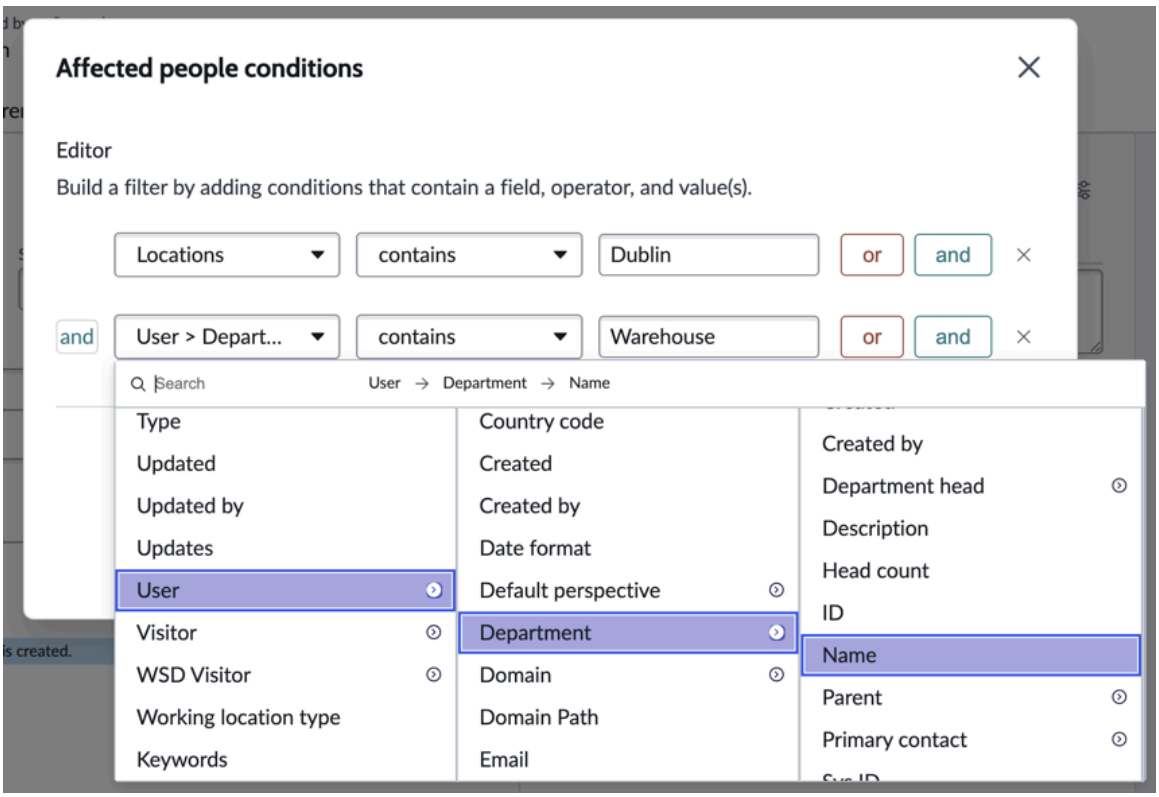
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ( ).
3. Select the **Action schedules** list and then **All**.
4. Select **New**.
5. On the form, fill in the fields.

   For information on field descriptions, see Health and safety action schedule form.

6. In the **Assign to** field, add conditions to auto-assign the generated actions.
   This criteria is based on the Health and Safety profile [sn_ohs_im_health_and_safety_profile] table. It automatically adds users with the Health and Safety profile to the action records generated for this schedule.

   a. Select **Set conditions**.

   b. In the condition builder, define conditions to choose people this action should be assigned to, and select **Set**.
   You can choose fields from the Health and Safety profile table and dot-walk fields when selecting a field in the condition builder. For example, the following image shows the conditions to select users in the Warehouse department in Dublin.



7. Select **Save**.

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Result

- The action schedule is saved in the Action schedule [sn_ohs_im_action_schedule] table.
- The **Actions** tab appears for the action schedule.
- In the **Actions** tab, the action scheduler creates and auto-assigns actions based on the condition builder. An action schedule might generate multiple actions for people over time.
- The created actions appear in the assigned user's **My Tasks** list on both the Employee Center and the Now Mobile app. From either location, the user can respond to the action and update its status. For information on action form fields, see Health and Safety action form.

Managing safety knowledge articles

As a safety manager or agent, you can manage safety-related knowledge base articles in the Health and Safety Workspace.

The Health and Safety Knowledge is the same as the ServiceNow AI Platform Knowledge Management. For more information, see Knowledge Management.

Knowledge-related tasks in the Health and Safety Workspace

Based on your access permissions, you can perform the following Knowledge-related tasks in the Health and Safety Workspace:

- Create and publish an article to make it available to employees.
- View published, unpublished, and retired articles separately.
- Update the article at any time if necessary.
- Retire the article if it’s no longer required.
- Republish a retired article if necessary.
- Delete an article.

To learn about authoring and managing knowledge articles in a workspace, see Authoring a knowledge article in Agent Workspace.

Knowledge articles available with Health and Safety

The following empty knowledge base articles are available with the Health and Safety applications. You can update them according to your organizational needs and workflow.

- **Safety statement**: Use it to enter your company's safety statement.
- **Health and Safety contacts**: Add your local health and safety team contact numbers, emergency response numbers, or any other contacts that employees should use in the event of a safety incident or emergency.
- **Investigation Plan**: Use it to enter your company's investigation plan.
- **Health and Safety submission guidelines**: Use it to enter your company's safety submission guidelines.

Employees can access these knowledge articles from the Employee Center by navigating to **Health and Safety** > **Policy and procedures**.

Accessing knowledge articles in Health and Safety Workspace

To view a list of all knowledge base articles in the Health and Safety Workspace,

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1. Navigate to **Health and Safety Workspace** and select the configuration icon ( ).
2. In the **Configuration** tab, select **Knowledge**.

Note: By default, the knowledge list in the Health and Safety Workspace is filtered by the `Knowledge base = Safety` filter. However, to view all articles from other knowledge bases, you can do the following:

- Select the filter icon ( ) in the list and remove the `Knowledge base = Safety` filter.
- Additionally, to remove this default filter setting from the Knowledge list in the Health and Safety Workspace, remove it in the UIB related list configuration. For more information, see Lists

Create a Health and Safety knowledge article

Create a safety-related knowledge article in the Health and Safety Workspace to share information across your organization.

Before you begin

Role required: agent_workspace_user

About this task

For detailed information on authoring and managing knowledge articles in a workspace, see Authoring a knowledge article in Agent Workspace.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the configuration icon ( ).
3. In the **Configuration** tab, select **Knowledge** and then **All**.
4. Select **New**.
   To edit an existing article, open the one that you want to edit.
5. In the Create article dialog box, select an article template to create a knowledge article using defined fields and values.
   a. In the **Knowledge base** field, select the **Safety** knowledge base.
   b. In the **Article template** field, select the desired article template.
   The Article template list is populated based on the article templates configured for the selected knowledge base.
   c. Select **Create article**.
6. On the form, fill in the fields.
   For information on the knowledge field descriptions, see Create a knowledge article in Agent Workspace.
7. Select **Save**.
   - The article is saved and appears in the **My Articles - Unpublished** list.
   - Additional tabs appear on the form.

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8. Add details to the article, if necessary.
9. **Optional:** Select **Publish** to publish the article and make it available to employees.

Result

The knowledge article appears in a **Knowledge** list under **Configuration**:

- When published, it appears in the **My Articles - Published** list and the **All Articles** list. Published articles are visible to all employees.
- When unpublished, it appears in the **My Articles - Unpublished** list and the **All Articles** list.

Add a new Health and Safety related document

Add and store documents Health and Safety related documents so that they can be easily and appropriately referenced in related records.

Before you begin

Role required: sn_ohs_im.document_writer

About this task

- The ServiceNow® Document Management (com.snc.platform_document_management) plugin is installed with Health and Safety applications and enables you to manage your safety documents. For information on document management, see Document repository.
- All Health and Safety documents are stored in the Health and Safety document [sn_ohs_im_document_v2] table. The previous **Standards and Documents** list and its associated table [sn_ohs_im_document] have been deprecated. To access your existing safety documents, migrate them from the deprecated table into the new Health and Safety document [sn_ohs_im_document_v2] table. For more information, see Migrate existing safety documents to the Document library.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the configuration icon ().
3. In the **Configuration** tab, select **Health and Safety document library** and then **All**.
4. Select **New**.
   To edit an existing document, open the one that you want to edit.
5. On the form, fill in the fields.
   For information on the document field descriptions, see Create a document record.
6. **Optional:** In the Access Settings section, select the document access settings.
   For information on access settings, see Document security and access.
7. Select **Save**.
   The **Versions**, **Reviewers**, and **Approvers** tabs appear for this document.
8. **Optional:** In the **Reviewers** tab, select **New** to add a reviewer for this document.
9. **Optional:** In the **Approvers** tab, select **New** to add an approver the document.
   If there're multiple approvers added for a document, it is sent to approvers in ascending order based on the sequence number entered. If two approvers have the same sequence number, only one approver's approval is needed to move on to the next approver in the sequence.

   (Optional) For information on advanced approval rules and process, see Document approval and publish process.
10. In the **Versions** tab, select **New** to upload a version of this document.

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For information on field descriptions, see Health and Safety document version form.

11. If a reviewer and approver have been added for this document, select the version and then select **Submit Version** to it for review and approval.

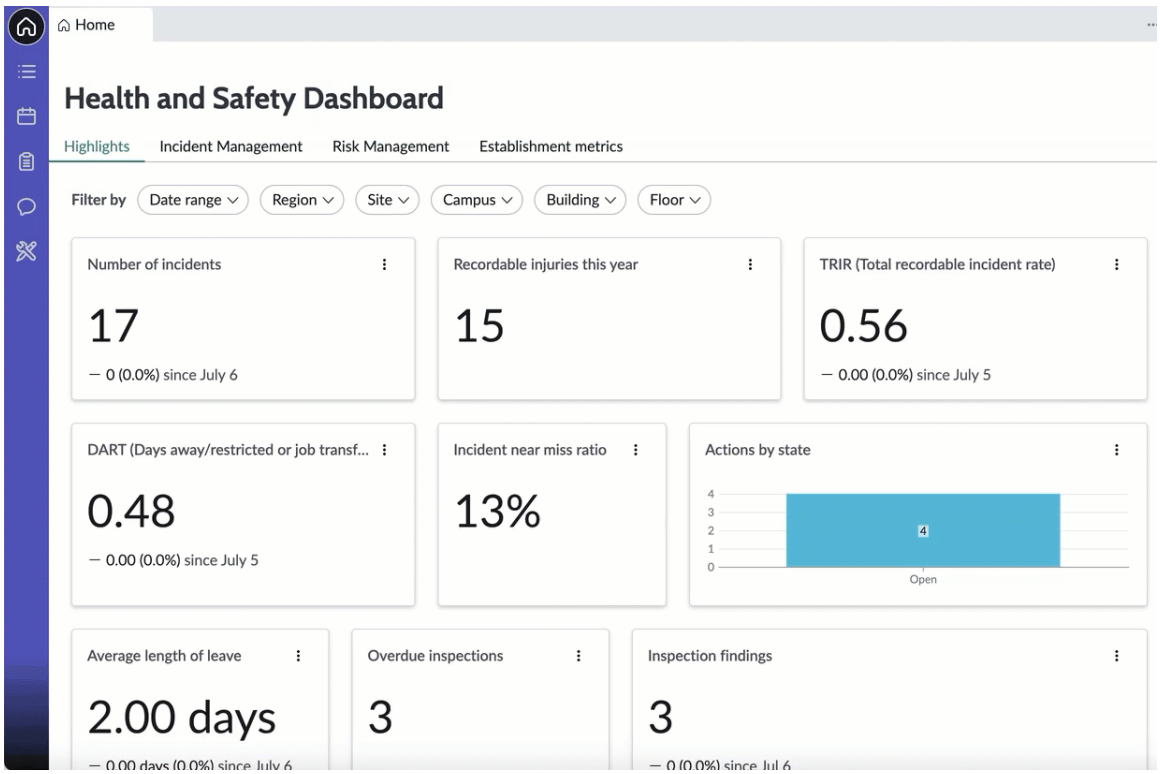
Result

- The document is listed in the **Health and Safety document library** list under **Configuration** and is saved in the Health and Safety document [sn_ohs_im_document_v2] table.
- The document is available to be referenced in Health and Safety records such as **Documents** tab on the Contractor company form when uploading documents related to the company or its workers.

Working with the Health and Safety dashboard

With the Health and Safety dashboard, you can actively monitor and manage workplace safety performance across different locations in your organization and identify areas needing attention.

When you have the Generative AI plugin installed, you can view the incident pattern analysis tab on the dashboard. For more information, see Incident pattern analysis.



Key features of the dashboard

- The dashboard provides a centralized view of key safety indicators such as incident counts, recordable injuries, and safety action status. You can monitor the status, see trends, and drill down into the details from a single view.
- The available filters help you to refine the view by date range, region, site, campus, building, and floor.
- Depending on your role, the dedicated tabs for **Incident Management** and **Risk Management** help you to easily track incidents and assess risks.

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Dashboard tabs

The dashboard features several tabs to enable you to navigate between different areas of workplace safety. The tabs and their widgets are available based on the installed Health and Safety applications in your ServiceNow instance.

Highlights

This tab features a selection of key cards from the Incident Management and Risk Management tabs, to provide a high-level summary of key safety metrics such as the total incidents, recordable injuries, and open risk assessments.

Incident Patterns

This tab provides safety managers with an automated, real-time overview of the recurring patterns across their safety incident data. For more information, see Incident pattern analysis.

Incident Management

This tab focuses on tracking and managing safety incidents, injuries, and observations. For detailed information on incident management metrics, see Monitoring and analyzing safety incident metrics.

Establishment Metrics

This tab shows key cards from the Incident Management tab, presented with a breakdown by establishment for more localized insights.

Risk Management

This tab shows metrics identifying, assessing, and mitigating risks. For detailed information on safety risk management metrics, see Monitoring and analyzing safety risk metrics.

Customizing widgets

You can customize the widgets in the dashboard to display relevant metrics by using the UI Builder. For more information, see UI Builder tutorial.

Required roles

- sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.compliance_manager, needed to see dashboard home page. The metrics on each tab are dependent on the user's access to that table.
- sn_ohs_im.admin and the following roles, to edit the dashboard:
  - pa_admin, to edit the Performance Analytics (PA) components used in the dashboard.
  - ui_builder_admin, to edit the dashboard visualizations that are built using the UI Builder.

Access the Health and Safety dashboard

To open the Health and Safety dashboard, navigate to **Workspaces** > **Health and Safety Workspace**.

Related topics

Monitoring and analyzing safety incident metrics

Monitoring and analyzing safety risk metrics

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Health and Safety Core reference

Learn about the components, such as the roles, tables, plugins, and store applications, that are installed when the Health and Safety Core data model is installed.

Components installed with Health and Safety Core

Several types of components are installed with installation of the Health and Safety Core data model, including tables, user roles, and scheduled jobs. This data model is automatically installed with Health and Safety applications.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Plugins installed

Plugins installed with Health and Safety Core

Plugin	Description
Playbook Experience Core [com.glide.playbook_experience.config]	Activates playbook for Health and Safety incidents.
Explicit Roles	Enables the assignment of [snc_external] role for external workers such as contractor workers.
Document Management [com.snc.platform_document_management]	Enables you to manage documents in Health and Safety applications. Provides storage space and a filing system that allows you to easily upload, retrieve, and delete documents.

Store applications installed

Store apps installed with Health and Safety Core

Store application	Description
Workplace Core [sn_wsd_core]	Enables workplace locations for Health and Safety Incident Management. **Important:** The application installation doesn't install the location demo data for the Workplace Core location model. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.
Health and Safety Components	Seismic component that enables the visual injury and illness picker, for example, in the Health and Safety Incident Management application. The component is used by safety teams to log injuries associated with an injury and illness

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Store apps installed with Health and Safety Core (continued)

Store application	Description
	report and quickly see the types and severity of injuries.

Roles installed

Roles in Health and Safety Core

Role title [name]	Description	Contains roles
Safety admin [sn_ohs_im.admin]	Administrator for Health and Safety applications who can: • Configure the Health and Safety Core and other Health and Safety applications • Has read, write, and create access to health and safety data • Grant Health and Safety roles	• template_read_gl • agent_workspace • sn_ohs_im.manag • workspace_user • sn_hs_rm.safety_ • sn_hs_rm.hierarc • sn_ohs_im.hs_pro • sn_hs_rm.risk_as • sn_ohs_im.operat • sn_hs_rm.safety_ • sn_hs_crm.contra • sn_hs_rm.risk_ma • sn_hs_cm.case_m • sn_hs_rm.risk_ca • sn_hs_rm.risk_da • sn_ohs_im.report • sn_ohs_im.compl • sn_hs_rm.safety_ • sn_hs_rm.permit_ • sn_hs_rm.industr • canvas_user • sn_ohs_im.meetir • platform_docume • sn_ohs_im.docum • sn_ohs_im_repor
Safety compliance manager	Administrator for Health and Safety reporting-related tasks who can:	• sn_ohs_im.establ • sn_ohs_im.establ

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Roles in Health and Safety Core (continued)

Role title [name]	Description	Contains roles
[sn_ohs_im.compliance_manager]	• Manage list of establishments • Review and determine which injuries and illnesses are recordable • Access and manage report generation such as OSHA 300 log, 300A summary, and 301 incident reports. For more information, see Health and Safety injury and illness reports.	• sn_ohs_im.report • sn_ohs_im.hs_pro • canvas_user
Safety reporter [sn_ohs_im.reporter]	Can submit Health and Safety incidents, observations, and questions from Employee Center and Now Mobile app	• sn_wsd_core.worl • sn_ohs_im.incide • sn_hs_cm.case_r • sn_ohs_im.observ • sn_ohs_im.meetir • sn_ohs_im.meetir
Sensitive content user [sn_ohs_im.sensitive_content_user]	Can view sensitive content such as incidents and injuries marked as sensitive. **Note:** When a report is generated (such as OSHA 300 or 300A), it contains all incidents, including the ones marked as sensitive, according to the template. However, sensitive information is not disclosed in the report as incident details are not included.	None
Observation sensitive content user sn_ohs_im.sensitive_observation_content_user	Safety agents can view sensitive content on safety observations reported anonymously. **Note:** The agent cannot view the anonymous report without this role assigned to them.	None
Safety workspace user [sn_ohs_im.workspace_user]	Can access Health and Safety Workspace.	workspace_user

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Roles in Health and Safety Core (continued)

Role title [name]	Description	Contains roles
Safety report manager [sn_ohs_im.report_manager]	Safety report manager who can: • Create and manage report field mappings in Health and Safety Workspace • Script report field mappings	• sn_ohs_im.hs_pro • canvas_user • sn_ohs_im.report
Report mapping manager [sn_ohs_im.report_mapping_manager]	Can create, read, update, and delete report field mappings	• sn_ohs_im.report • sn_ohs_im.worksp • sn_ohs_im.report • sn_ohs_im.report • sn_hs_rm.risk_ca • sn_hs_rm.job_rea • sn_hs_rm.job_saf • sn_hs_rm.hazard_ • sn_hs_rm.risk_ma • sn_hs_rm.hierarc • sn_hs_rm.audit_s • sn_hs_rm.control • sn_hs_rm.safety_ • sn_ohs_im.incide • sn_hs_rm.risk_as • sn_hs_rm.safety_ • sn_ohs_im.establ • sn_hs_crm.compa • sn_hs_cm.case_r • sn_ohs_im.action • sn_hs_rm.safety_ • sn_ohs_im.docum • sn_ohs_im.observ • sn_hs_rm.inspect • sn_hs_cm.rtw_rea • sn_ohs_im.action
Report mapping reader [sn_ohs_im.report_mapping_reader]	Can view report field mappings	None

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Roles in Health and Safety Core (continued)

Role title [name]	Description	Contains roles
Report mapping scripting [sn_ohs_im.report_mapping_scripting]	Can create, update, and delete script for report field mappings	None
Report mapping writer [sn_ohs_im.report_mapping_writer]	Can create, read, and update report field mappings	None
Safety action manager [sn_ohs_im.action_manager]	Can perform all operations related to Health and Safety Actions	• sn_ohs_im.action • sn_ohs_im.action • sn_ohs_im.action • sn_ohs_im.action
Safety action writer [sn_ohs_im.action_writer]	Can create and update Health and Safety Actions	sn_wsd_core.locatio
Safety action reader [sn_ohs_im.action_reader]	Can view Health and Safety Actions	None
Safety action writer restricted [sn_ohs_im.action_writer_restricted]	Can create and update Health and Safety Actions when all restrictions have been met	• sn_ohs_im.action • sn_wsd_core.loca
Establishment writer [sn_ohs_im.establishment_writer]	Can create and update establishment records in Health and Safety Workspace	None
Establishment reader [sn_ohs_im.establishment_reader]	Can view records in Health and Safety Workspace	None
Safety incident manager [sn_ohs_im.incident_manager]	Can perform all operations related to Health and Safety incidents	• sn_ohs_im.incide • sn_ohs_im.incide
Safety incident writer [sn_ohs_im.incident_writer]	Can create and update Health and Safety incidents	sn_wsd_core.locatio

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Roles in Health and Safety Core (continued)

Role title [name]	Description	Contains roles
Safety incident reader [sn_ohs_im.incident_reader]	Can view Health and Safety incidents	• sn_hs_rm.risk_ca • sn_hs_rm.hazard_ • sn_hs_rm.templa
Safety incident reporter [sn_ohs_im.incident_reporter]	Can submit Health and Safety incidents	• sn_ohs_im.hs_pro • sn_hs_rm.risk_ca • sn_hs_rm.hazard_ • sn_wsd_core.loca
Safety incident writer restricted [sn_ohs_im.incident_writer_restricted]	Can create and update Health and Safety incidents when all restrictions have been met	sn_wsd_core.locatio
Safety observation manager [sn_ohs_im.observation_manager]	Can perform all operations related to Health and Safety observations	• sn_ohs_im.observ • sn_ohs_im.observ
Safety observation writer [sn_ohs_im.observation_writer]	Can create and update Health and Safety observations	sn_wsd_core.locatio
Safety observation reporter [sn_ohs_im.observation_reporter]	Can submit Health and Safety observations	• sn_ohs_im.hs_pro • sn_wsd_core.loca
Safety observation reader [sn_ohs_im.observation_reader]	Can view Health and Safety observations	None
Safety observation writer restricted [sn_ohs_im.observation_writer_restricted]	Can create and update Health and Safety observations when all restrictions have been met	sn_wsd_core.locatio
Document admin [sn_ohs_im.document_admin]	Administrator for Health and Safety documents who can: • Add, update, and delete Health and Safety related documents in the **Standards and documentation** list • Grant access to **Standards and documentation** list	• sn_ohs_im.docum • sn_ohs_im.docum
Document reader	Can view Health and Safety documents	None

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Roles in Health and Safety Core (continued)

Role title [name]	Description	Contains roles
[sn_ohs_im.document_reader]		
Document writer [sn_ohs_im.document_writer]	Can add and update Health and Safety related documents in the **Standards and documentation** list	None
Safety meeting manager [sn_ohs_im.meeting_manager]	Safety meeting coordinator who can: • Schedule safety meetings and create invite lists and agendas • Create Health and Safety actions for safety meetings • Add related documents to safety meetings • Mark safety meetings as sensitive and assign the sensitive meeting content user role	• sn_ohs_im.meetir • sn_ohs_im.meetir
Sensitive meeting content user [sn_ohs_im.sensitive_meeting_content_user]	Can view safety meetings and meeting minutes marked as sensitive	None
Safety meeting minute taker [sn_ohs_im.meeting_minute_taker]	Safety meeting minute taker who can: • Log meeting minutes for a safety meeting • Mark attendance for meeting attendees • Create actions for meeting minutes • Mark meeting minutes as sensitive	• sn_ohs_im.meetir • sn_ohs_im.meetir
Safety meeting writer [sn_ohs_im.meeting_writer]	Can create and update Health and Safety meetings	• sn_ohs_im.action • sn_ohs_im.docum • sn_ohs_im.meetir • sn_ohs_im.action
Safety meeting reader [sn_ohs_im.meeting_reader]	Can view Health and Safety meetings	• sn_ohs_im.action • sn_ohs_im.docum • sn_ohs_im.hs_pro • sn_wsd_core.loca • sn_ohs_im.action

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Roles in Health and Safety Core (continued)

Role title [name]	Description	Contains roles
Safety meeting minute writer [sn_ohs_im.meeting_minute_writer]	Can create and update meeting minutes for Health and Safety meetings	• sn_ohs_im.action • sn_ohs_im.meetir
Safety meeting minute reader [sn_ohs_im.meeting_minute_reader]	Can view meeting minutes for Health and Safety meetings	• sn_ohs_im.hs_pro • sn_ohs_im.action
Health and Safety profile writer [sn_ohs_im.hs_profile_writer]	Health and Safety profile writer who: • Has create access to the Health and Safety profile [sn_ohs_im_health_and_safety_profile] table • Can assign and update Health and Safety profile to users in your organization, including employees, visitors, and contractors	sn_ohs_im.hs_profi
Health and Safety profile reader [sn_ohs_im.hs_profile_reader]	Can view users with Health and Safety profile in your organization	none
Safety action schedule writer [n_ohs_im.action_schedule_writer]	Can write, create, or delete access for action schedule table.	• sn_ohs_im.action • sn_ohs_im.action
Safety action schedule reader [sn_ohs_im.action_schedule_reader]	Can view safety action schedules.	sn_ohs_im.action_r
Health and Safety workspace user [sn_ohs_im.workspace_user]	Has access to the Health and Safety Workspace.	workspace_user

Tables installed

Tables installed with Health and Safety Core

Table	Description
Health and Safety action [sn_ohs_im_action]	Stores all actionable outputs from all safety incidents, observations, and root cause analyses. This table extends the Health and Safety task [sn_ohs_im_task] table.
Health and Safety document (Deprecated)	Stores Health and Safety related documents. This table has been deprecated.

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Tables installed with Health and Safety Core (continued)

Table	Description
[sn_ohs_im_document]	**Note:** All Health and Safety related documents are now stored in the Health and Safety document [sn_ohs_im_document_v2] table. For information on migrating your existing safety documents from the deprecated table into the new Health and Safety document [sn_ohs_im_document_v2] table, see Migrate existing safety documents to the Document library.
Health and Safety document [sn_ohs_im_document_v2]	Stores all Health and Safety related documents. This table extends the Document [ds_document] table of Document Management application.
Health and Safety document version [sn_ohs_im_document_version]	Stores all versions of Health and Safety related documents. This table extends the Versions [ds_document_version] table of Document Management application.
Health and Safety profile [sn_ohs_im_health_and_safety_profile]	Stores all users with Health and Safety profile in your organization, including employees, visitors, and contractors.
Asset [sn_ohs_im_m2m_task_sn_ent_asset]	Maps Health and Safety task [sn_ohs_im_task] to Enterprise Asset to track assets involved in incidents and observations. **Note:** Installs only when Expanded Model and Asset Classes [sn_ent] application is installed. For more information, see Additional features in Health and Safety
Meeting [sn_ohs_im_meeting]	Stores all safety meeting records. This table extends the Health and Safety task [sn_ohs_im_task] table.
M2M action task sn_ohs_im_m2m_ohs_task_action	Stores all action tasks created for safety meetings.
Health and Safety m2m meeting document (Deprecated) [sn_ohs_im_m2m_meeting_document]	Stores documents related to safety meetings. **Note:** All safety meetings related documents are now stored in the Health and Safety document [sn_ohs_im_document_v2] table.
Health and Safety m2m meeting minute action	Stores all actions created for safety meetings.

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Tables installed with Health and Safety Core (continued)

Table	Description
[sn_ohs_im_m2m_meeting_minute_action]	
Health and Safety meeting attendee [sn_ohs_im_meeting_attendee]	Stores all attendees added to safety meetings.
Health and Safety meeting minute [sn_ohs_im_meeting_minute]	Stores all meeting minute records created for safety meetings.
5 Whys root cause analysis [sn_ohs_im_rca_five_whys]	Instance of a Root Cause Analysis used by the safety team to identify the root cause of safety tasks, for example, Health and Safety incident [sn_ohs_im_incident].
Root cause analysis [sn_ohs_im_rca]	Reference base Health and Safety task [sn_ohs_im_task] so that it can be associated with any table that extends Health and Safety Task, for example, Health and Safety incident [sn_ohs_im_incident]. This table is the base table extended by all RCA types.
ICAM root cause analysis [sn_ohs_im_rca_icam]	Instance of a Root Cause Analysis [sn_ohs_im_rca] used by the safety team to identify the root cause of safety inspection findings.
Report field mapping [sn_ohs_im_report_field_mapping]	Stores all report field mappings created. These mappings enable you to import your reporting PDF templates and map its fields with safety record fields.
Form field mapping [sn_ohs_im_report_form_field_mapping]	Stores all form field mappings created between your reporting PDF templates' fields and safety records' fields. These mappings help to generate reports from safety records with fields auto-populated in your PDF template.
Schedule [sn_ohs_im_schedule]	Stores all records of Health and Safety related schedules. Several Health and Safety tables extend this table, for example, Audit schedule [sn_hs_rm_audit_schedule].
Action schedule [sn_ohs_im_action_schedule]	Stores records of Health and Safety action schedules.
Health and Safety task [sn_ohs_im_task]	Extends core Task table. Several Health and Safety tables extend this table for shared fields, for example, WSD Location [sn_wsd_core_workplace_location].
Health and Safety visitor	Stores records of all visitors that have visited your organization or site.

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Tables installed with Health and Safety Core (continued)

Table	Description
sn_ohs_im_health_and_safety_visitor	

Health and Safety action form

Safety agents can use the Health and Safety action form to assign an action for a safety incident or observation.

For more information, see Add an action for a safety incident or observation.

Health and Safety action form fields

Field	Description
Health and Safety task	Parent Health and Safety record this action is related to. If the action belongs to an existing safety record such as an injury or risk assessment, select that record.
State	State of the action.
Number	System-generated unique number for the action.
Assignment group	User group responsible for this action.
Assigned to	User responsible for this action.
Location	Location this action item applies to.
Due date	Date by when this action should be complete.
Type	Type of the action. • **Corrective**: An action to eliminate the causes of non-conformities or undesirable situations to stop them from happening again. • **Preventive**: An action to prevent the occurrence of such non-conformities. • **Task**: A generic task assigned as an action. • **Learning**: An action that includes a learning for the user, for example, completing a training. **Note:** The **Learning** option in this field appears only when the Learning Core (sn_lc) application is installed on your instance. For more information, see Additional features in Health and Safety.
Learning material	Learning material for the training, for example, knowledge article or URL for a training video.

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Health and Safety action form fields (continued)

Field	Description
	This field appears if the **Type** is set as **Learning**. **Note:** This field lists the learning content created in Learning Core. For more information, see Managing course and catalog content.
Short description	Brief description of the action.
Description	Detailed description about this action.

Health and safety action schedule form

Safety team can use the action schedule form for actions to be created and assigned based on defined conditions.

For information on setting up a health and safety action schedule, see Create a Health and Safety action schedule.

Health and Safety action schedule

Field	Description
Short description	Brief description about this action schedule.
Active	Option for marking the action schedule available for use. An action schedule must be active for actions to be created and assigned to people.
Location	Location that this action item applies to. The action is assigned to the people at this location.
Type	Type of the action. • **Corrective**: An action to eliminate the causes of non-conformities or undesirable situations to stop them from happening again. • **Preventive**: An action to help prevent the occurrence of non-conformities. • **Task**: A generic task assigned as an action.

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Health and Safety action schedule (continued)

Field	Description
	• **Learning**: An action that includes a learning for the user, for example, completing a training. **Note:** The **Learning** option in this field appears only when the Learning Core (sn_lc) application is installed on your instance. For more information, see Additional features in Health and Safety.
Learning material	Learning material for the training, for example, knowledge article or URL for a training video. This field appears only when **Learning** is selected from **Type**. **Note:** This field lists the learning content created in Learning Core. For more information, see Managing course and catalog content.
Days to complete action after creation	Number of days by when this action should be complete after it's generated and assigned to a user. This field sets the due date of the created action.
Assign to	Users with the Health and Safety profile the generated actions are assigned to. Use the **Set conditions** builder in this field to define the criteria for assigning this action to specific individuals. For more information, see Create a Health and Safety action schedule.
This is recurring action	Option for marking this action as recurring. When this option is selected, the **Duration details** section and fields appear.

The following duration details section appears only when the action schedule is set as recurring.

Duration details

Frequency	Frequency at which the system generates an action record such as daily, weekly, or monthly.
Weekly	Weekday when the recurring action records should be generated.

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Duration details (continued)

	You can select which particular day of the week to generate action records for—The action doesn't have to be created every day in the week. This field appears only when **Frequency** is set as **Weekly**.
Months to generate	Months when the recurring action records should be generated. You can select which particular months to generate action records for—The action doesn't have to be created every month. This field appears only when **Frequency** is set as **Monthly**.
Day	Day of the selected month when the schedule should run to generate the recurring action records. If the selected month has fewer days, the schedule will run on the last day of the month. This field appears only when **Frequency** is set as **Monthly**.

Health and Safety profile form

Safety manager can use the health and safety profile form to assign the Health and Safety profile to employees, visitors, and contractor workers.

For information on assigning the Health and Safety profile for a user, see Assign Health and Safety profile to a user.

Health and Safety profile form fields

Field	Description
Type	Type of the person who's assigned the Health and Safety profile. • **Employee**: An employee of your organization. • **Visitor**: A person from outside the organization who came to the site as a visitor. • **Contractor**: A contract worker from a contractor company who came to the site to perform required tasks. This option appears only when the Health and Safety Contractor Management (sn_hs_crm) application

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Health and Safety profile form fields (continued)

Field	Description
	is installed on your instance. For more information, see Additional features in Health and Safety Incident Management.
User	Name of the user. This field appears only when **Employee** or **Contractor** is selected from **Type**. **Note:** When **Contractor** is selected from **Type**, this field only lists users who have the [snc_external] role assigned to them.
Visitor	Name of the visitor. This field appears only when **Visitor** is selected from **Type**. **Note:** This field only lists users who've been added to the Health and Safety visitor [sn_ohs_im_health_and_safety_visitor] table. For more information, see Add a Health and Safety visitor.
Title	Job title of the user.
Department	Department that the user works in.
Email	User's official email address.
Mobile phone	User's mobile number.
Expertise	User's areas of work expertise. This field appears only when **Employee** or **Contractor** is selected from **Type**.
Date of birth	User's birth date. This field appears only when **Employee** or **Contractor** is selected from **Type**.
Employment start date	Start date of user's employment in the organization. This field appears only when **Employee** or **Contractor** is selected from **Type**.
Employment finish date	End date of user's employment in the organization.

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Health and Safety profile form fields (continued)

Field	Description
	This field appears only when **Employee** or **Contractor** is selected from **Type**.
Establishments	Establishments in the organization that the user works for.
Locations	Locations that the user works at.

Health and Safety document version form

Safety team such as safety agent and contractor coordinator can use the Health and Safety document version form to add or modify a safety-related document.

For more information, see Add a new Health and Safety related document.

Health and Safety document version form fields

Field	Description
Document	Name of the document this version is associated with. This field is auto-populated with the document name this version is created from.
Version state	State of the document version. Only a version in the Published state is available for use in Health and Safety records.
File type	File type of the document. • **Attachment**: A document uploaded and attached in this record. • **Hyperlink**: A link for the document stored at another location. • **Knowledge article**: A knowledge article stored at another location.
URL	Web link of the document location. This field appears only when **Hyperlink** is selected from **File type**.
Attachments	Document attached in this record. Select **Select file** to upload the document version. This field appears only when **Attachment** is selected from **File type**.
Knowledge article	Knowledge article record.

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Health and Safety document version form fields (continued)

Field	Description
	This field appears only when **Knowledge article** is selected from **File type**.
Expiry date	Date when the document expires.
Notes	Information related to the document version.

Health and Safety report field mapping form

A safety report mapping manager can create a mapping report for generating reports using the report field mapping form.

For more information on creating a mapping, see Create a safety report field mapping for generating reports.

Report field mapping form fields

Field	Description
Number	System-generated unique number for the report field mapping.
Location	Location that this report field mapping applies to.
Short description	Brief description about the report field mapping.
State	State of the report field mapping. • **Draft**: Select to perform mappings in the Form Field Mapping tab. • **Published**: Select to publish and mark this mapping available for use. Only the published mappings are available to select during report generation. • **Obsolete**: Select to mark this mapping as obsolete.
Mapping table	Health and Safety table to map PDF fields to, for example, Health and Safety incident [sn_ohs_im_incident] or Injury and illness [sn_ohs_im_injury_illness]. Only the tables enabled for report field mapping appear in this field.
Fillable PDF	Option whether the exported PDF is editable. • **Empty fields are editable**: Only the fields that have not been filled in the exported PDF can be edited. • **All fields are editable**: Any field in the exported PDF can be edited. • **No fields are editable**: No field in the exported PDF can be edited.
Attach to the record	Enables attaching the report generated from this mapping directly to the associated record. When this option is not selected, the generated report is downloaded to the browser instead of being attached to the record.

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Report field mapping form fields (continued)

Field	Description
Required roles	Role that can generate the report using this mapping. You can add multiple roles in this field. Only users with these roles can view and select this report mapping when generating a report. If there are no roles in this field, the mapping is available to all users when generating the report.
PDF document	PDF template that you need to use for reporting and map the safety record fields to. Select **Attach file** to import the reporting PDF template.

Health and Safety meeting form

A safety team such as a safety meeting manager can use the Health and Safety meeting form to add or modify a safety-related meeting.

For more information, see Log a safety meeting.

Meeting form

Field	Description
Category	Category for the meeting. The list in this field displays the choices defined for the `Category` column in the Meeting [sn_ohs_im_meeting] table.
State	State of the meeting.
Short description	Brief description about this meeting.
Start date and time	Date and time when the meeting starts.
End date and time	Date and time when the meeting ends.
Location	Location for the meeting.
Meeting URL	Link for the meeting if it's online.
Host	Safety meeting manager hosting the meeting.
Additional hosts	Additional hosts assigned to the meeting who can also host the meeting when the main host is unavailable.
Sensitive content	Option to indicate that the meeting contains sensitive information. Only a user with the Sensitive meeting content user [sn_ohs_im.sensitive_meeting_content_user] role can view a meeting marked as sensitive.
Agenda	Rich text field for adding the meeting agenda.

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Attendees

Field	Description
External attendees (Deprecated)	Names of the external users attending this meeting. **Note:** This field is deprecated. To add an external attendee, you can use the **Public attendee** field on the meeting attendee form. For more information, see Add attendees to a safety meeting.

Outcome

Field	Description
External absentees (Deprecated)	Names of the external users who didn't attend this meeting. **Note:** This field is deprecated. To mark the absence for an external attendee, you can use the **Attendance** field for the public attendee. For more information, see Health and Safety meeting attendee form.
Meeting notes	Rich text field for adding meeting notes when the meeting is in progress or after the meeting.

Health and Safety meeting attendee form

A safety team such as a safety meeting manager can use the Health and Safety meeting form to add an external attendee or a single internal attendee to a safety meeting.

For more information, see Add attendees to a safety meeting.

Meeting attendee form

Field	Description
Public attendee	Option to indicate that the meeting attendee is an external user, from outside your organization.
Public attendee name	Name of the public attendee. For a public person, enter the name. This field appears only when the **Public attendee** option is selected.
Attendee profile	User with the Health and Safety profile in your organization. This field appears only when the **Public attendee** option is not selected.

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Meeting attendee form (continued)

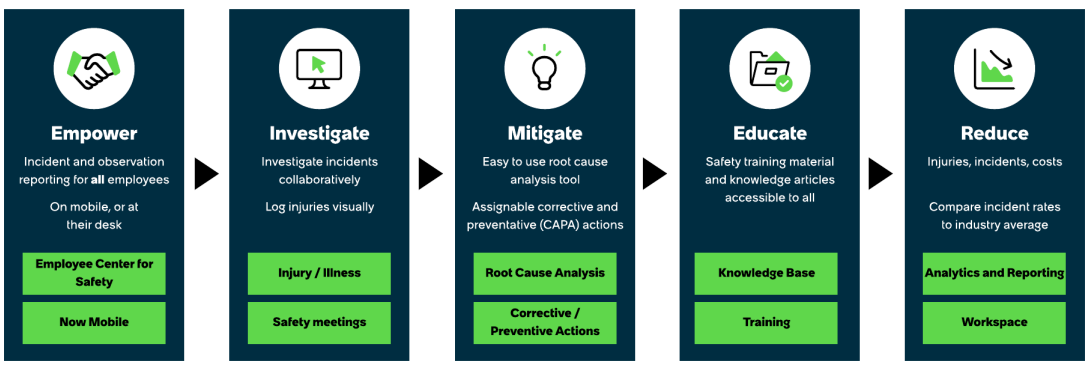
Field	Description
User group	User group that the meeting attendee belongs to. This field appears only when the **Public attendee** option is not selected. It is automatically set based on the Health and Safety profile of the attendee.
Email	Email ID of the meeting attendee. For a public attendee, enter the email ID. This field is available only when the **Public attendee** option is selected. For an employee or visitor, the email ID is auto-populated from the user or visitor profile.
Attendance	Status of attendance of the meeting attendee.
Type	Type of meeting attendee such as Employee, Contractor, Visitor, or Public. This field is automatically set based on the value of **Public attendee** and **Attendee profile** fields.
Work notes	Notes for the meeting attendee.

Health and Safety Incident Management

The ServiceNow® Health and Safety Incident Management application is a solution in Health and Safety that enables organizations to record, track, and report on health and safety related employee incidents and observations. Furthermore, it provides capabilities to investigate and reduce incidents.

This solution automates processes that facilitate cross-departmental collaboration and enable everyone to monitor and track incident status, from initiation to resolution and reporting needs.

Health and Safety Incident Management overview



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The image shows an overview of Health and Safety Incident Management and its capabilities such as:

- Report incidents and observations through mobile or Employee Center.
- Report safety concern anonymously through the **Anonymous Report Center**.
- Investigate incidents and log injuries
- Mitigate incidents through tools such as root cause analyses and actions
- Educate employees through Health and Safety knowledge articles

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Explore  Learn about how employees, safety managers, and agents use Health and Safety Incident Management.	**Configure**  Set up Health and Safety Incident Management.	**Submit incidents**  Submit and track safety incidents and observations.
Manage incidents  Manage safety incidents and observations to investigate and resolve them.	**Reporting**  Fill and export reporting forms for injuries and illnesses in your organization.	**Reference**  Get details about components such as roles, tables, plugins, and store applications that are installed.

Exploring Health and Safety Incident Management

Health and Safety Incident Management enables the safety department to receive incidents and observations and conduct detailed legal investigations by conducting interviews, gathering evidence, and preparing final reports and recommended actions.

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Features

- Puts safety in the hands of all employees
  - Report incidents and observations
  - Access Health and Safety knowledge articles
- Provides anonymous reporting capabilities
  - Report safety concerns anonymously
  - Flags incidents, observations, and concerns as sensitive.
- Gives powerful tools to safety team to investigate incidents and observations such as:
  - Injury and illness logging
  - Incident Playbook
- Resolve incidents and prevent them from happening again in future with the following methods:
  - Root cause analyses
  - Corrective and preventative action assignment
- Provides reporting capability
  - Auto-fill and export reports for safety incidents and the injuries and illnesses
  - Establishment list and saved annual reports per establishment
- Provides structured way to manage safety meetings
  - Schedule and track health and safety related meetings and attendees
  - Log meeting minutes and actions.
  - Flag meetings and minutes as sensitive

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

Personas

Health and Safety Incident Management is aimed at the following personas:

User personas for Health and Safety Incident Management

Persona	Description
Administrator	Safety admin who's responsible for configuring the application.
End users (requesters)	Safety requesters who report safety incidents and observations. The following users can submit incidents and observations:

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User personas for Health and Safety Incident Management (continued)

Persona	Description
	• Employees (through Employee Center and Now Mobile app) • Safety agent (can directly create a safety incident from workspace) • Safety operations manager such as line manager or supervisor (through workspace)
Fulfillers	Safety team responsible for working on safety tasks such as incidents and observations that come to the safety team. The following agents work on safety tasks: • Safety agent • Safety manager • Safety operations manager
Reporting	Compliance manager who accesses and manages report generation such as OSHA 300 log, 300A summary, and 301 injury and illness incident reports.
Executives	Executives who access the Health and Safety executive landing page to view safety metrics and gain insight into how the safety team and company are performing in terms of safety.

Health and Safety Incident Management workflow example

The safety incident workflow available with Health and Safety Incident Management connects employees and safety department and agents to quickly initiate, investigate, and resolve safety incidents and observations in your organization.

The following graphic shows a simplified example of the safety incident reporting workflow in Health and Safety Incident Management. It shows at a high level, the end-to-end scenario of what happens when a warehouse accident is reported in ServiceNow Health and Safety Incident Management.

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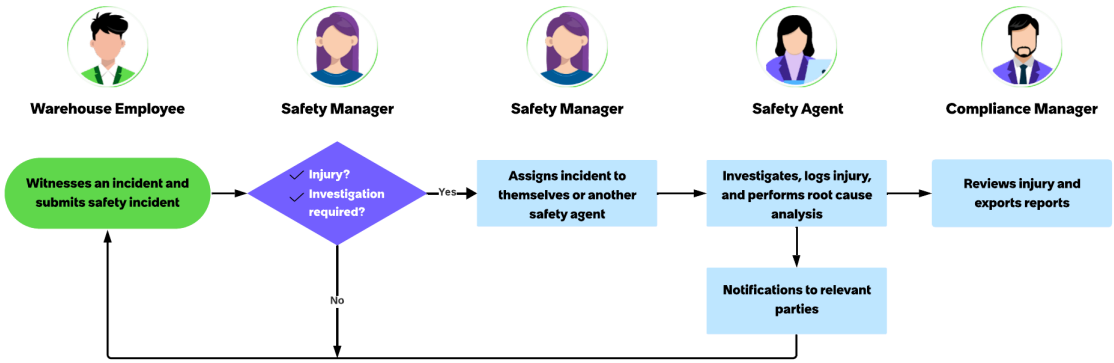
Health and Safety Incident Management workflow example for handling a safety incident



When a safety incident is created, the **Report an incident** workflow initiates a playbook configured for safety incidents. Safety agents log in to Health and Safety Workspace, complete their assigned tasks, and update incident status throughout the workflow. The incident playbook guides agents through the steps that are needed to resolve it.

As an employee, operations manager, or safety manager

A warehouse employee sees a colleague getting injured in an accident at the workplace. The employee submits an incident in the Employee Center with a description of what happened.

The employee can also notify a safety operations manager (such as a line manager) or safety manager who can then create a safety incident on behalf of the injured person.

As a safety manager or safety agent

1. A safety manager or agent opens the incident from the incident list, assigns it to themselves or another safety agent, and updates its details in the incident playbook.

   The incident workflow is triggered automatically.

2. The safety manager or agent starts the investigation using the incident playbook activities that might include:
   - Gathering information and updating the incident details
   - Adding people involved in the incident such as an injured person, witnesses, and so on.
   - Logging an injury and illness report for the injured person and adding the assets involved
   - Performing root cause analysis for the incident
3. The manager or agent also prepares recommended actions to avoid such an incidence in the future.

As a safety compliance manager

In the incident playbook, a compliance manager reviews the injury and generates reporting forms, for example, an OSHA 301 form.

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Setting up Health and Safety Incident Management

You can set up your implementation for the Health and Safety Incident Management application by installing the application and reviewing and configuring the components that are installed with the application.

Install Health and Safety Incident Management

You can install the Health and Safety Incident Management application (sn_hs_im_incident) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

Important:

- Starting from version 10, the previously known Health and Safety Incident Management (sn_ohs_im) application has been renamed to Health and Safety Core. There is no impact on existing customers using versions up to 9. However, to receive the latest updates for incident management, customers on version 9 and earlier must also install (sn_hs_im_incident).
- When you upgrade from Health and Safety Incident Management v9 to Health and Safety Core v10, certain reference fields and column labels related to Health and Safety user profile might not update correctly. To resolve this issue, see the KB article [KB2057452] in the Now Support Knowledge Base to create and run a Fix Script.

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Incident Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Tip: The application installation does not install the location demo data for the Workplace Core location model. The location picker on incident and observation forms is mandatory so that users can't submit these forms unless they are populated with locations. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.

Role required: admin

About this task

The following items are installed with Health and Safety Incident Management:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Health and Safety Incident Management.

This table lists the optional applications that can be installed for additional features:

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Optional applications for additional features in Health and Safety Incident Management

Application	Description
Anonymous Report Center [com.sn_anonymous_report_center]	Installs anonymous reporting capability for Health and Safety Incident Management. For more information, see Activate the Anonymous Report Center. To configure the **Anonymous report center**, see Setting up the Anonymous Report Center.
Expanded Model and Asset Classes [sn_ent]	Enables tracking and managing of enterprise assets that are associated with the safety incidents and observations.
Geo map component [sn_geo_map]	Provides access to enable the map component in the Health and Safety Workspace from the application properties. To install, see Activate a plugin
Geolocation plugin [com.snc.geolocation]	Enables geolocation feature on the Now Mobile app and gives access to manual tracking options. For more information, see Enabling and selecting location tracking options
Health and Safety Case Management [sn_hs_cm]	Installs case management capability for Health and Safety Incident Management. For more information, see Install Health and Safety Case Management.
Human Resources Scoped App: Core [com.sn_hr_core]	Installs Case and Knowledge Management for creating HR cases from injury and illness records. For more information, see Activate Case and Knowledge Management. **Note:** For creating HR cases from injury and illness records, this plugin needs to be activated together with the Health and Safety Case Management (sn_hs_cm) application. For more information, see Create an HR case from an injury or illness.
Health and Safety Contractor Management [sn_hs_crm]	Installs contractor management capability for Health and Safety Incident Management.

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Optional applications for additional features in Health and Safety Incident Management (continued)

Application	Description
	For more information, see Install Health and Safety Contractor Management.
Health and Safety Incident Management OSHA Content Pack [com.snc.sn_hs_im_osha]	Installs OSHA reporting capability for Health and Safety Incident Management. For more information, see Install Health and Safety Incident Management OSHA Content Pack.
Learning Core [sn_lc]	Installs Learning Core to enable learning content in Health and Safety actions. For more information, see Configuring Learning Core.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Incident Management application (sn_ohs_im) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure property to set employee hours worked

Configure the property that sets the total number of employee hours worked for your organization in the past 12 months. These hours are for the entire organization and are not broken down per establishment.

Before you begin

Role required: sn_ohs_im.admin

About this task

This property is required to generate the safety frequency rates metrics on the Health and Safety Workspace landing page.

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The property value is also used to auto-fill the total hours worked when exporting an injury and illness report, such as the OSHA 300A form, when annual information is not available for the establishment.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the property *Total Hours Worked*, enter the total number of employee hours worked for your organization in the past 12 months.
3. Select **Save**.

Configure scheduled job to generate frequency rates

Configure the scheduled job to load the safety frequency rates and ensure that the safety metrics on the Health and Safety Workspace landing page are up to date.

Before you begin

Ensure that the application scope is selected as Health and Safety Incident Management PA Content Pack. For more information, see Application picker.

Role required: sn_ohs_im.admin

About this task

The *[OHS] Safety Metrics* job is set to run daily by default.

Procedure

1. Navigate to **All** > **Performance Analytics** > **Jobs**.
2. Search and open the *[OHS] Safety Metrics* scheduled job.
3. In the **Run** field, set the frequency of the scheduled job.
4. To activate the scheduled job, select the **Active** check box.
5. Select **Update**.

> **Note:** To run the scheduled job and update metrics on demand, select **Execute Now**.

Disable the safety incident playbook

If you need to enable a tab-based experience for safety incidents in your instance, configure the property that disables the **Report an incident** playbook.

Before you begin

Ensure that the application scope is selected as Health and Safety Incident Management. For more information, see Application picker.

Role required: sn_ohs_im.admin

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the *Flag to disable the playbook for Health and Safety Incidents* property, select **Yes**.

Result

The following changes occur when the safety incident playbook is turned off:

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- Enables a tab-based experience for safety incidents. You can record the incident related information into these tabs:
  - People involved
  - Injury and illness
  - Assets
  - Root cause analysis
  - Health and Safety actions
- Enables the association of multiple injuries and illnesses to a single incident.

Configure property to set default map location for Health and Safety incidents and observations

Configure the property that enables users to add default coordinates when the map location isn't enabled on their device.

Before you begin
Role required: sn_ohs_im.admin

About this task
This property is required to set a default coordinate for the map when using the map location feature to report an incident or an observation.

The Geo map component [sn_geo_map] must be installed to use this feature. For more information, see Activate a plugin.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the **Default map location fields**, enter the latitude and longitude.
3. Select **Save**.

Result
The latitude and longitude are saved as the default coordinates that loads while completing the Health and Safety incidents or observation form.

Submitting safety incidents and observations

Safety team can begin the investigation process by creating incidents and observations based on reports received from employees. Employees can also directly submit incidents and observations from the Employee Center portal. They can select a report type, fill out the necessary form, and then submit it.

Submit a safety incident as an employee

Submit a safety incident through the Employee Center to report it to the safety department for an investigation.

Before you begin
Role required: sn_ohs_im.requestor

About this task
If there's an emergency, you can use the Health and Safety contacts knowledge article to access the emergency contact list. This knowledge article includes the local health and safety team contact numbers, emergency response numbers, or any other contacts that employees can use if there's a health and safety incident or emergency.

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To open the emergency contacts knowledge article from the Employee Center, navigate to **Health and Safety** > **Policy and procedures** > **Health and Safety contacts**.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, select the **Health and Safety** menu and then select **Health and Safety Incidents**.
   - Select **Report Health and Safety Incident - Basic** to report an incident with basic information.
   - Select **Report Health and Safety Incident - Advanced** to report an incident that includes its detailed information such as injured people, injury details, hazards, and assets involved in the incident.
3. On the form, fill in the fields.

Note:

- The map loads when the **Use map location** check box is selected. On the map, the Google search box can be used to find the exact location of the incident or observation.
- The **Contractor** option appears only when the Health and Safety Contractor Management (sn_hs_crm) application is installed on your instance. For more information, see Additional features in Health and Safety. The field only lists users who have the [snc_external] role assigned to them and have their Health and Safety profile created. For more information, see Assign Health and Safety profile to a user.

4. If you have selected the **Report Health and Safety Incident - Advanced** form, use the **Describe the event** section to add more details about the incident.

Describe the event fields

Field	Description
Is there an injured person?	Option to indicate if there's an injured person resulting from the incident. The **Injured people** section appears when **Yes** is selected in this field.
Injured people	Name and injury details of the person injured during the incident. **a.** Select **Select injured people**. **b.** In the **Add injured person** section, add the person who got injured and the type of the injury. **c.** In the **Add injured body parts** section, add injury details for each body part injured during the incident. Select a body part in the visual injury picker, then select **Severity** and **Affected body part**, and add **Description** about the injury.

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Field	Description
	To add multiple injury types to the same body part, select **Add New Injury** and fill in the fields. **d.** Select **Save**. If there are more than one affected persons in this incident, add each.
Other people involved	People who are directly or indirectly connected to the incident, such as an injured person, collaborators, witnesses, and other relevant individuals. These individuals can be from within or outside your organization. If there are other people involved in the incident, add their names. Select **Add people involved** to add them. For more information, see People Involved form. If the incident involves more than one person, add each.
Select hazards	If there's a hazard identified during this incident, add it using the **Select hazards** button. Select all the hazards identified for this incident. If there are other hazards that are identified and not available in the **Select hazards** window, enter them manually in the **Other hazards** field.
Add Assets	If an asset was involved in this incident, add it using the **Select assets** button. Add all the assets that are involved in this incident. **Note:** The assets field appears only when Expanded Model and Asset Classes [sn_ent] application is installed. For more information, see Additional features in Health and Safety

5. **Optional:** If necessary, attach an image about the incident using the add attachments icon ( ).
6. Select **Submit**.
7. **Optional:** To track the status and updates to your safety incident, navigate to the **My Requests** list and open the record.

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Result

- The safety incident is submitted in the New state and is available in the **My Requests** list in the Employee Center.
- The affected employee receives a pre-configured email notification about the incident submission.

What to do next

As a safety manager or agent, if the incident isn't assigned to you, you can assign it to yourself and start working on it. You can also assign it to another safety agent. For more information, see Assign a safety incident or observation.

Submit a safety observation as an employee

Submit a safety observation through the Employee Center to report it to the safety department for an investigation.

Before you begin

Role required: sn_ohs_im.requestor

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, under the **Health and Safety** menu, select the **Health and Safety Observations** option and then select **Report Health and Safety Observation**.
3. On the form, fill in the fields.

Note:

- The **Contractors involved** option appears only when the Health and Safety Contractor Management (sn_hs_crm) application is installed on your instance. For more information, see Additional features in Health and Safety. The field only lists users who have the [snc_external] role assigned to them and have their Health and Safety profile created. For more information, see Assign Health and Safety profile to a user.
- The **Assets** field appears only when Expanded Model and Asset Classes [sn_ent] application in installed. For more information, see Additional features in Health and Safety.

4. **Optional:** If necessary, attach an image about the observation using the add attachments icon ( ).
5. Select **Submit**.
6. **Optional:** To track the status and updates to your safety observation, navigate to the **My Requests** list and open the record.

Result

- Based on the selected category, a safety observation is submitted in the New state and is available in the **My Requests** list in the Employee Center.
- The affected person receives a pre-configured email notification about the observation submission.

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What to do next

As a safety manager or agent, if the observation isn't assigned to you, you can assign it to yourself and start working on it. You can also assign it to another safety agent. For more information, see Assign a safety incident or observation.

Create a safety incident or observation as a safety agent or supervisor

Begin the investigation for a safety incident or observation by reporting it on behalf of an employee.

Before you begin

Role required: sn_ohs_im.operations_manager, sn_ohs_im.manager, or sn_ohs_im.agent

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, open the safety incident or observation list.
   - For the safety incidents list, select **Safety Incidents** and then **All**.
   - For the safety observations list, select **Safety Observations** and then **All**.
4. Select **New**.
5. On the form, fill in the fields.
   - For a safety incident, fill in the fields in the **Enter incident summary** activity in the **Report an incident** tab.
   - For a safety observation, fill in the fields in the **Details** tab.

   Note: To enable the map component in the Health and Safety Workspace install the Geo map component [sn_geo_map] plugin. For more information, see Additional features in Health and Safety.
6. **Optional:** If necessary, attach an image about the incident or observation using the Attachments section.
7. Select **Save**.

Result

Based on the selected category, a safety incident or observation is created in the New state.

What to do next

As a safety manager or agent, you can assign the incident or observation to yourself and start working on it. You can also assign it to another safety agent. For more information, see Assign a safety incident or observation.

Manage incidents, observations, and anonymous safety concerns

Use a structured approach to report, assess, and resolve workplace safety incidents and observations. You can also submit anonymous safety concerns so the organization can proactively manage risks and maintain a safe work environment.

Managing Health and Safety incidents and observations

As a member of the safety department, work on the submitted safety incidents and observations to resolve them and suggest corrective and preventative actions.

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For safety incidents and observations to be resolved effectively, the safety fulfillers can evaluate the reported incident in detail to identify sources for information, add or modify involved people, interview questions to collect key details, and attach supporting and relevant documentation.

Use Health and Safety Workspace to perform these activities with tools such as incident playbook, injury and illness logging, root cause analysis, and corrective and preventative action.

Assign a safety incident or observation

Assign a safety incident or observation to yourself or to another safety agent to start working on it.

Before you begin
Role required: sn_ohs_im.manager or sn_ohs_im.agent

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, open the safety incident or observation list.
   - For the safety incidents list, select **Safety Incidents** and then **Unassigned**.
   - For the safety observations list, select **Safety Observations** and then **Unassigned**.
4. In the list, select a record to open it.
5. Navigate to the **Assignment group** field.
   - For the safety incidents, select **Report an incident** tab and then **Enter incident summary** playbook activity.
   - For the safety observations list, select **Details** tab.
6. In the **Assignment group** field, select the safety group.
   For more information on safety groups, see Health and Safety groups.
7. In the **Assigned to** field, select your name.
   To assign to another agent, select the user.
8. Select **Save**.

Result
The incident or observation is assigned to you or the selected agent.

What to do next
The assigned agent can start working on it to resolve it.

Work on a safety incident

Work on a safety incident assigned to you to collect incident information, ensure that any outstanding tasks are completed, and resolve the incident.

Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

About this task
Use the **Report an incident** playbook available with Health and Safety Incident Management to manage safety incidents and resolve them. You can access the **Report an incident** playbook tab when a safety incident is assigned to you.

For more information on how to interact with a playbook, see Playbooks.

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Note: To work in a tab-based experience for safety incidents, your administrator can disable the playbook through Health and Safety properties. For more information, see Disable the safety incident playbook.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, select **Safety Incidents** and then **All**.
4. In the list, select the incident to work on.
5. Select the **Report an incident** tab.
   This playbook guides you through the steps that are involved in resolving an incident.
6. Record the information related to the incident using the playbook activities and tasks.

   Selecting **Mark complete** marks an activity as complete and makes the next activity or stage available in the playbook. However, you can also select **Skip** to move to the next activity. You can go back to previous activities and update them later.

   - **Add event details**, to add event location and sequence of events. For more information, see Log sequence of events.
   - **Add people involved**, to add people involved in the incident such as an injured person, witnesses, and collaborators. For more information, see Add or modify people involved.
   - **Add injury and illness**, to log an injury and illness report for each affected person during the incident. For more information, see Log an injury and illness
   - **Add assets involved**, if an asset was involved in this incident. For more information, see Associate an asset to the incident.
   - **Add root cause analysis**, to perform root cause analysis for the incident. For more information, see Perform root cause analysis.
7. Add actions based on your root cause analysis.
   For more information, see Add an action for a safety incident or observation.
8. Record your findings that you gathered about the incident.
   You can use these sections to add your findings:
   - **Attachments** section to attach findings in the form of image, video, and documentation such as a signed witness statement.
   - **Activity** section to add findings in the form of free text. You can also use this section to add links to related knowledge base articles.
9. **Optional:** Research content related to the incident by selecting the Agent assist icon ().
   Agent assist searches the knowledge base using the text from the incident's **Short description** field and shows relevant articles.
10. **Optional:** Generate a report for the safety incident, if needed.
    For more information, see Generate a report for a safety incident, observation, or injury.
11. **Optional:** Close the safety incident after all activities are complete.
    The incident moves to the Closed Complete state.

Add hazards and log sequence of events for a safety incident

Add hazards and log a sequence of events for a safety incident as part of its investigation.

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Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Safety Incidents** list, open a safety incident assigned to you in which you want to add the sequence of events.
4. Select the **Report an incident** tab.
   The incident playbook opens.
5. In the **Enter incident summary** stage, under the **Add event details** activity, add the following information.
   a. Location where this incident happened.
   b. Add hazards identified during this incident.
   c. Log the sequence of events as you know them right now.
      You can use the available formatting tools to format the text.
6. Select **Save**.
7. **Optional:** To mark this activity as complete, select **Mark complete**.
   The next activity or stage becomes available in the playbook.
8. **Optional:** If necessary, revisit the sequence of events using the edit icon in the section.

Result
The logged events appear in the Sequence of events section in the **Incident Overview** tab.

What to do next
Add people involved in the incident such as injured person, witnesses, and collaborators.

Manage people involved in a safety incident

Add a person involved or modify the information of an existing person involved in a safety incident.

Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

About this task
People involved are individuals who are directly or indirectly connected to an incident, such as an injured person, collaborators added to the watch list, witnesses, and other relevant individuals. These individuals can be from within or outside your organization.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Open a safety incident assigned to you in which you want to add involved people.
3. Select the **Report an incident** tab.
   The incident playbook opens.
4. In the **Add people involved** activity, add or modify a person involved.

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- To add a person involved, fill in the fields in the **Add persons involved** section.
- To modify the record of an existing person involved, select the person in the **People involved** list to open it.

For field descriptions, see People Involved form.

5. Select **Save**.
6. **Optional:** To mark this activity as complete, select **Mark complete**.
   The next activity or stage becomes available in the playbook.

Result
The involved person is listed in the People involved section of the activity. The involved person's card also appears in the People involved section in the **Incident Overview** tab.

What to do next
If this incident involves more than one person, create a record for each.

Log an injury and illness

Log an injury and illness that resulted from a health and safety incident.

Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

About this task
Add an injury and illness record for each affected person during the incident.

Note: If your admin has turned off the playbook and you're using a tab-based experience for safety incidents, you can associate multiple injuries and illnesses to a single incident. For more information, see Disable the safety incident playbook.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon () and navigate to the **Lists** tab.
3. Open a safety incident assigned to you to add the injury to.
4. Select the **Report an incident** tab.
   The incident playbook opens.
5. In the **Add injury and illness** activity, add the injury and illness.
   a. Select **New**.
   b. On the form, fill in the fields in the **Person**, **Healthcare**, and **Injury and illness details** sections.
   For field descriptions, see Injury and illness fields.
6. Select **Save**.
   The injury picker section is enabled where you can add injuries on a human body.
7. In the **What was the injury?** section, add the injury.
   a. In the visual human body part picker, select the injured body part.
   b. Fill in the fields and select **Save**.

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Injury details

Field	Description
Severity	Seriousness of the injury.
Affected body part	Body part that was injured.
Description	Details of the injury.

c. **Optional:** To add multiple injury types to the same body part, select **Add New Injury** and fill in the fields.

d. **Optional:** If there's more than one injury, select the other injured body parts and add their details like the earlier step.

- The selected body parts are highlighted on the injury picker based on the severity of the injury. For example, a red region on the body represents a serious injury.
- The color on an injury detail card matches with the highlighted color of the related body part.

8. Select **Save**.
9. **Optional:** Create an HR case for the injury or illness using the **Create HR Case** button, if needed.

   Note: This button appears only when the following conditions are met:

   - Health and Safety Case Management (sn_hs_cm) application and the Human Resources Scoped App: Core (com.sn_hr_core) plugin are installed on your ServiceNow instance.
   - Safety case manager [sn_hs_cm.case_manager] role assigned to you.
   - **Employee** is selected in the **Person type** field.

   For more information, see Create an HR case from an injury or illness.

10. **Optional:** Create a return to work case for the person involved in this injury or illness using the **Create RTW Case** button, if needed.

    Note: This button appears only when the following conditions are met:

    - Health and Safety Case Management (sn_hs_cm) application is installed on your ServiceNow instance.
    - Safety case manager [sn_hs_cm.case_manager] role assigned to you.
    - **Employee** is selected in the **Person type** field.

    However, the button doesn't appear when the Human Resources Scoped App: Core (com.sn_hr_core) plugin is also installed on the instance.

    For more information, see Create a return to work case from an injury or illness.

11. **Optional:** Research content related to the injury by selecting the Agent assist icon ( ). Agent assist searches the knowledge base using the text from the injury's **Injury description** field and shows relevant articles.

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Result

- The injury is listed in the Injury and Illness section of the activity. The injury card also appears in the Injuries and Illnesses section in the **Incident Overview** tab.
- The **Generate OSHA 301 form** button appears based on the following conditions:
  - The Health and Safety Incident Management OSHA Content Pack (com.snc.sn_hs_im_osha) application is installed on your ServiceNow instance.
  - The **Recordable** option is selected on the injury and illness report.
  - The safety compliance manager [sn_ohs_im.compliance_manager] role is assigned to you.

What to do next
If an asset was involved in this injury, add it in the next playbook activity.

Associate an asset with a safety incident

Associate an enterprise asset with a safety incident.

Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

About this task
Add all the assets that are involved in an incident.

Note: The assets can be associated only when the Expanded Model and Asset Classes [sn_ent] application is installed. For more information, see Additional features in Health and Safety

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Click the incident management icon () and navigate to the **Lists** tab.
3. In the **Safety Incidents** list, open a safety incident assigned to you to which you want to associate the asset.
4. Select the **Report an incident** tab.
   The incident playbook opens.
5. Navigate to the **Add assets** stage and then **Add assets involved** activity.
6. In the Add asset involved section, fill in the fields.

   a. In the **Asset** field, select the asset that was involved.
   The fields related to the selected asset are auto-populated from the asset record.

   b. In the **Asset involvement** field, enter the type of its involvement.

7. Click **Save**.
8. **Optional:** If required, add more assets that are involved in this incident.

Result
The selected asset is listed in the Assets involved section of the activity. It also appears in the Assets involved section in the **Incident Overview** tab.

What to do next
Add a root cause analysis to perform root cause analysis for this incident.

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Perform root cause analysis for a safety incident

Perform a root cause analysis (RCA) for a safety incident as you go through its investigation.

Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

About this task
The application includes the Five whys technique of root cause analysis. You can add as many root cause analyses as you need to an incident.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Open a safety incident assigned to you to add the root cause to.
3. Select the **Report an incident** tab.
   The incident playbook opens.
4. In the **Add root cause analysis** activity, fill in the fields in the Add root cause analysis section.
5. In the **Problem** field, enter the problem statement.
6. To identify the precise one underlying reason, ask why to each of the subsequent responses and enter in **Why?** fields.
7. In the **Root cause** field, enter the answer to the last Why.
8. Select **Save**.
9. **Optional:** If necessary, add more root cause analysis for this incident.

Result
The root cause analysis is listed in the Root cause analysis section of the activity. The root cause card also appears in the Root cause analysis section in the **Incident Overview** tab.

What to do next
Add a corrective or preventive action based on your root cause analysis.

Work on a safety observation

Work on a safety observation assigned to you to resolve it.

Before you begin
Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, select **Safety Observations** and then **All**.
4. Open the safety observation to work on and change the state to Work in Progress.
5. Record the following information related to the observation.
   You can record this information in any order as needed.

   a. In the **Assets** tab, select **New** to associate an asset to the observation.

      Note: The assets field appears only when Expanded Model and Asset Classes [sn_ent] application is installed. For more information, see Additional features in Health and Safety

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The fields related to the selected asset are auto-populated from the asset record.

b. In the **People involved** tab, select **New** to add people involved in the observation such as witnesses and collaborators.
   - For a description of the field values, see People Involved form.
   - If an observation involves more than one person, add a record for each.
   - To modify the record of an existing person involved, select it in the list to open it and update.

c. In the **Root cause analysis** tab, select **New** to perform the root cause analysis for the observation.
   The application includes the Five whys technique of root cause analysis. You can add as many root cause analyses as you need to an observation.

6. Add an action based on your root cause analysis.
   For more information, see Add an action for a safety incident or observation.
7. Record your findings that you gathered about the observation.
   You can use these sections to add your findings:
   - **Attachments** section to attach findings in the form of image, video, and documentation such as a signed witness statement.
   - **Activity** section to add findings in the form of free text. You can also use this section to add links to related knowledge base articles.
8. **Optional:** Research content related to the observation by selecting the Agent assist icon ( ).
   Agent assist searches the knowledge base using the text from the observation's **Short description** field and shows relevant articles.
9. **Optional:** Generate a report for the safety observation, if needed.
   For more information, see Generate a report for a safety incident, observation, or injury.
10. **Optional:** Close the safety observation after all activities are complete.

Result
The observation moves to the Closed Complete state.

Create an HR case from an injury or illness

Create an HR case for an employee who is on leave because of an injury or illness or needs any other assistance from the HR department.

Before you begin
Ensure that the following conditions are met:

- The Health and Safety Case Management (sn_hs_cm) application is installed on your ServiceNow instance. For more information, see Install Health and Safety Case Management.
- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed on your instance. For more information on activating it, see Activate Case and Knowledge Management.
- HR service property for creating an HR case for an injury is configured. For more information, see Configure HR service for creating an HR case for an injury.
- **Employee** is selected in the **Person type** field on the injury and illness record. For more information, see Injury and illness fields.

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Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager, and sn_hs_cm.case_manager

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon () and navigate to the **Lists** tab.
3. Open an injury and illness record to add the HR case to.

Option	Steps
From a safety incident	**a.** In the **Safety Incidents** list, select **All**. **b.** In the list, select the incident that contains the injury and illness report to add the HR case to. **c.** Select the **Report an incident** tab to open the playbook. **d.** In the **Add injury and illness** activity, select the injury and illness report to add the case to.
From an injury and illness list	**a.** In the **Injury / illnesses** list, open the list. **b.** In the list, open the injury and illness report that you want to add the HR case to.

4. Select **Create HR Case** and then select **Confirm**.

Result

The HR case is created and added to the **HRSD case record** field on the injury form. For more information, see Injury and illness fields.

Create a return to work case from an injury or illness

If an employee is returning to work after an injury or illness, create a return to work case to assess the employee's capability to work before they return.

Before you begin

Ensure that the following conditions are met:

- The Health and Safety Case Management (sn_hs_cm) application is installed on your ServiceNow instance. For more information, see Install Health and Safety Case Management.
- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is not installed on your instance. For more information on activating it, see Activate Case and Knowledge Management.
- **Employee** is selected in the **Person type** field on the injury and illness record. For more information, see Injury and illness fields.

Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager, and sn_hs_cm.case_manager

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Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon () and navigate to the **Lists** tab.
3. Open an injury and illness record to add the return to work case to.

Option	Steps
From a safety incident	**a.** In the **Safety Incidents** list, select **All**. **b.** In the list, select the incident that contains the injury and illness report to add the re turn to work case to. **c.** Select the **Report an incident** tab to open the playbook. **d.** In the **Add injury and illness** activity, select the injury and illness report to add the case to.
From an injury and illness list	**a.** In the **Injury / illnesses** list, open the list. **b.** In the list, open the injury and illness report that you want to add the return to work case to.

4. Select **Create RTW case** and then select **Confirm**.

Result

- The return to work case is created and added to the **RTW case record** field on the injury form. For more information, see Injury and illness fields.
- The injury and illness record is auto-populated in the **Injury and illness** tab of the return to work case. For more information, see Health and Safety case.

Add an action for a safety incident or observation

Add an action to address the root causes of the reported safety incident or observation. You can add multiple actions for the incident or observation.

Before you begin

Role required: sn_ohs_im.manager or sn_ohs_im.agent

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the **Lists** tab under **Incident Management**, open the safety incident or observation list.
   - For the safety incidents list, select **Safety Incidents** and then **All**.
   - For the safety observations list, select **Safety Observations** and then **All**.
3. In the list, open a safety incident or observation to add the action to.
4. In the **Health and Safety actions** tab, select **New**.
5. On the form, fill in the fields.
   For information on field descriptions, see Health and Safety action form.

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6. Select **Save**.
7. **Optional:** If necessary, add more actions for the incident or observation.

Result

- The action appears in the list of actions in the **Health and Safety actions** tab of the incident or observation. It is also listed in the **Actions** list on Health and Safety Workspace.
- The action appears in the assigned user's **My Tasks** list on both the Employee Center and the Now Mobile app. From either location, the user can respond to the action and update its status.

What to do next

- You can assign the action to yourself or to another safety team member to start working on it.
- You can share the action, independent of the incident, with other groups or agents, so that they can prevent the similar incident from happening at any of their locations. To share an action, select **Copy action**. For more information, see Share an action with other teams.

Share an action with other teams

Share an action, independent of the incident or risk, with other groups or agents at another location, so that they can prevent the similar issue from happening at any of their locations.

Before you begin

Role required: sn_ohs_im.manager or sn_ohs_im.agent

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the **Lists** tab under **Incident Management**, open the safety incident or observation list.
   - For the safety incidents list, select **Safety Incidents** and then **All**.
   - For the safety observations list, select **Safety Observations** and then **All**.
3. In the list, open a safety incident or observation you want to copy the action from.
4. In the **Health and Safety actions** tab, select to open the action you want to share with other groups.
5. Select **Copy action**.
   The action is duplicated. However, if the original action includes a Learning material, it is not copied to the duplicated action.
6. Share the action using the **Assignment group** or **Assigned to** field and select **Save**.

Result

- The action appears in the **My Tasks** list of the assigned user on the Employee Center.
- The action is also listed in the **Actions** list on the Health and Safety Workspace.

Generate a report for a safety incident, observation, or injury

Generate a report for a safety incident, observation, or an injury that you want to export for your regional or industry-specific requirements.

Before you begin

Role required: sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.operations_manager

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About this task

The report generation uses a report field mapping for your reporting PDF template. A report field mapping includes mappings of fields from the safety record (such as incident or observation) to the fields in the reporting PDF template. When generating a report, the exported PDF fills in information from the selected safety record through mapped fields. This field mapping, therefore, speeds up the report filling for incidents, observations, or injury and illness records. For more information on report field mapping, see Create a safety report field mapping for generating reports.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the Incident Management icon ().
3. In the **Lists** tab, open the safety incident, observation, or injury and illness list.
   - For the safety incidents list, select **Safety Incidents** and then **All**.
   - For the safety observations list, select **Safety Observations** and then **All**.
   - For the injury and illness list, select **Injury / illnesses** and then **All**.
4. In the list, open a safety record to generate a report for.
5. Select **Generate report**.
6. In the **Generate report** dialog box, select a report mapping in the **Select report** field.

   In the **Select report** field, the following report mappings are available:
   - Published report mapping forms.
   - Report mappings assigned to your role or with no assigned roles.
7. Select **Generate**.

Result

- The report is generated based on the selected report mapping and its PDF template.
- The PDF template is automatically filled with the values from the selected safety record.
- Based on the attachment option in the selected report mapping, the generated report is available in one of the following locations:
  - **Attachments** section of the safety record.
  - Downloaded to the browser.

  For more information, see Health and Safety report field mapping form.

Close a safety incident or observation

Close a safety incident or observation assigned to you when you complete all activities for resolving it.

Before you begin

Ensure that you've completed all related activities before closing the safety incident or observation.

Role required: sn_ohs_im.manager or sn_ohs_im.agent

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Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon () and navigate to the **Lists** tab.
3. Open a safety incident or observation to close.
   - For the safety incidents list, select **Safety Incidents** and then **Assigned to me**.
   - For the safety observations list, select **Safety Observations** and then **Assigned to me**.
4. Select the safety incident or observation to close.
5. Close the incident or observation.
   - For a safety incident, select **Close incident** and then select **Resolve**.
   - For an observation, select **Close observation** and then **Confirm**.

Result
The incident or observation moves to the Closed Complete state.

Reopen a safety incident or observation

If a safety incident or observation requires further investigation after it was closed or canceled, you can reopen it to work on it again.

Before you begin
Role required: sn_ohs_im.manager

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, open the safety incident or observation list.
   - For the safety incidents list, select **Safety Incidents** and then **All**.
   - For the safety observations list, select **Safety Observations** and then **All**.
4. Open the safety incident or observation to reopen and change the state to **Work in Progress**.

Result
The safety incident or observation is reopened.

What to do next
Work on the safety incident or observation to complete it.

Managing an anonymous safety concern

You can submit, track, and manage an anonymous report and get it addressed without revealing the identity of the individual reporting the safety concern.

The Anonymous Report Center promotes anonymous reporting of safety incidents, observations, and near-misses without fear of retaliation, discrimination, or personal consequences. This type of reporting helps maintain a safe, supportive environment while upholding the overall well-being of all employees.

Use the Employee Center to report an anonymous concern and use the Health and Safety Workspace to manage the anonymous safety concern.

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The **Anonymous report center** [com.sn_anonymous_report_center] plugin must be installed to enable reporting a safety concern anonymously. For more information, see Activate the Anonymous Report Center.

Submit an anonymous safety concern

Report a safety concern or observation without revealing your identity.

Before you begin

Role required:

- For **Employee Center**: sn_ohs_im.requestor
- For **Anonymous Report Center**: None/Anonymous reporter

About this task

The **Anonymous report center** [com.sn_anonymous_report_center] plugin must be installed to enable reporting a safety concern anonymously. For more information, see Activate the Anonymous Report Center.

Procedure

1. Navigate to **All** > **Self service** > **Employee Center**.
2. In the Health and Safety tab
   - Select the **Anonymously report a safety concern** quick link.
   - Select **Health and safety observations** and then select the **Anonymously report a safety concern** card.
   - Select the **Browse health and safety** button and then select the **Anonymously report a safety concern** card.
3. Select **Continue** on the modal dialogue.
   You are signed out of the Employee Center and signed into the **Anonymous Report Center** as a guest user.
4. Select the **Submit an Anonymous Report** card and then select the **Health and safety concern** card.
5. On the form, fill in the details.

Health and safety concern form

Field	Description
Do your best to describe the situation	Information that accurately describes the safety concern that you witnessed with as much detail and your recollection of the events as possible. **Note:** All information provided is confidential.
List the people who are involved and how they are involved	The names of the individuals involved in the safety incident. Include any witnesses to the incident. **Note:** Full names, job titles, teams, and departments are valuable for the investigators.

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Field	Description
Provide the date and time relevant to the situation	The date and time of the safety concern. **Note:** Estimated dates are acceptable.
Let us know where this situation is taking/ took place	The name of the location where the safety concern occured. **Note:** Details like room, desk spaces, or areas within the building the safety concern took place are all helpful to investigators.
I understand that the information I'm providing, including any sensitive or personal details, will be reviewed by the appropriate agents and teams.	After completing the form, check the box.

6. Enter the verification code and select **Submit**.
7. Select **Download report copy** to save a PDF copy of your record.
   The report key and report number are required to:
   - Access updates or comments related to your anonymous report.
   - Track, ask questions, and view or add details about the anonymous case.
   - Respond to any follow-up questions.

   Note: The anonymous report can't be accessed without the report key.

Result
The anonymous report is submitted and you can use the report key and report number to check the progress of the report.

Follow up on an anonymous report

You can retrieve your anonymous report to submit or view comments and updates from the agents working on your anonymous report. You must have the report key and report number to access your anonymous report.

Before you begin
Role required: none

About this task
After submitting the anonymous report, you'll see a modal dialogue requesting you to download a report copy. This copy contains a unique key that gives you access to the anonymous report you created.

Note: The anonymous report can't be accessed without the report key. If you no longer have this information, submit a new an anonymous report. Add details on the safety incident and indicate that you lost the report key and report number from your previous anonymous report.

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Procedure

1. Navigate to **All** > **Self Service** > **Employee Center**
2. In the Health and Safety tab,
   - Select the **Anonymously report a safety concern** quick link.
   - Select **Health and safety observations** and then select the **Anonymously report a safety concern** card.
   - Select the **Browse health and safety** button and then select the **Anonymously report a safety concern** card.
   - Select the **Anonymous report center**URL on the report copy.
3. Select **Continue** on the modal dialogue.
   You are signed out of the Employee Center and signed into the **Anonymous Report Center** as a guest user.
4. Select the **Follow up on a Report** card.
5. Enter the report key and the report number from the report copy.
6. Enter the text verification code.
7. Select **Next**.
8. Enter questions or comments related to the anonymous report.
9. Select **Post**.

Work on an anonymous safety concern

Only an agent with the sensitive content role [sn_ohs_im.sensitive_observation_content_user] can view and work on the anonymous report in the Health and Safety Workspace.

Before you begin

Role required: sn_ohs_im.sensitive_observation_content_user

Procedure

1. Navigate to **All** > *Health and Safety* > *Health and Safety Workspace*.
2. Select the incident management icon ().
3. In the **Lists** tab, select **Safety Observations** and then **All**.
4. Open the anonymous safety observation to work on and change the state to work in progress.
5. On the form, fill in the fields.
   - The **Opened by** field automatically displays **Anonymous reporting user** for an anonymous safety incident.
   - The comments that the agent adds in the **Details** related item reflects in the anonymous report.
   - In the **Details** related item, the sensitive content field indicates that the incident contains sensitive information. This field is automatically selected when the anonymous safety concern is created. Only a user with a sensitive content role can view a report marked as sensitive.
   - The **What was observed** field displays the responses of the anonymous reporter to the Health and Safety concern form.
6. Record the following information related to the observation.
   You can record this information in any order as needed.

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a. In the **Assets** tab, select **New** to associate an asset to the observation.
The fields related to the selected asset are auto-populated from the asset record.

b. In the **People involved** tab, select **New** to add people involved in the observation such as witnesses and collaborators.
   - For a description of the field values, see People Involved form.
   - If an observation involves more than one person, add a record for each.
   - To modify the record of an existing person involved, select it in the list to open it and update.

c. In the **Root cause analysis** tab, select **New** to perform the root cause analysis for the observation.
The application includes the Five whys technique of root cause analysis. You can add as many root cause analyses as you need to an observation.

7. Add an action based on your root cause analysis.
For more information, see Add an action for a safety incident or observation.
8. Record your findings that you gathered about the observation.
You can use these sections to add your findings:
   - **Attachments** section to attach findings in the form of image, video, and documentation such as a signed witness statement.
   - **Activity** section to add findings in the form of free text. You can also use this section to add links to related knowledge base articles.
9. **Optional:** Generate a report for the safety observation, if needed.
For more information, see Generate a report for a safety incident, observation, or injury.
10. **Optional:** Close the safety observation after all activities are complete.

Result
The observation moves to the Closed Complete state.

Monitoring and analyzing safety incident metrics

The **Incident Management** tab of the Health and Safety dashboard provides a comprehensive view for monitoring and analyzing safety incident metrics, including incident counts, injury data, observation trends, and action tracking across various organizational levels.

For any selected period and location, you can drill down into detailed data, empowering your teams to respond faster, improve conditions, and build a safer workplace.

When you have the Generative AI plugin installed, you can view the incident pattern analysis tab on the dashboard. For more information, see Incident pattern analysis.

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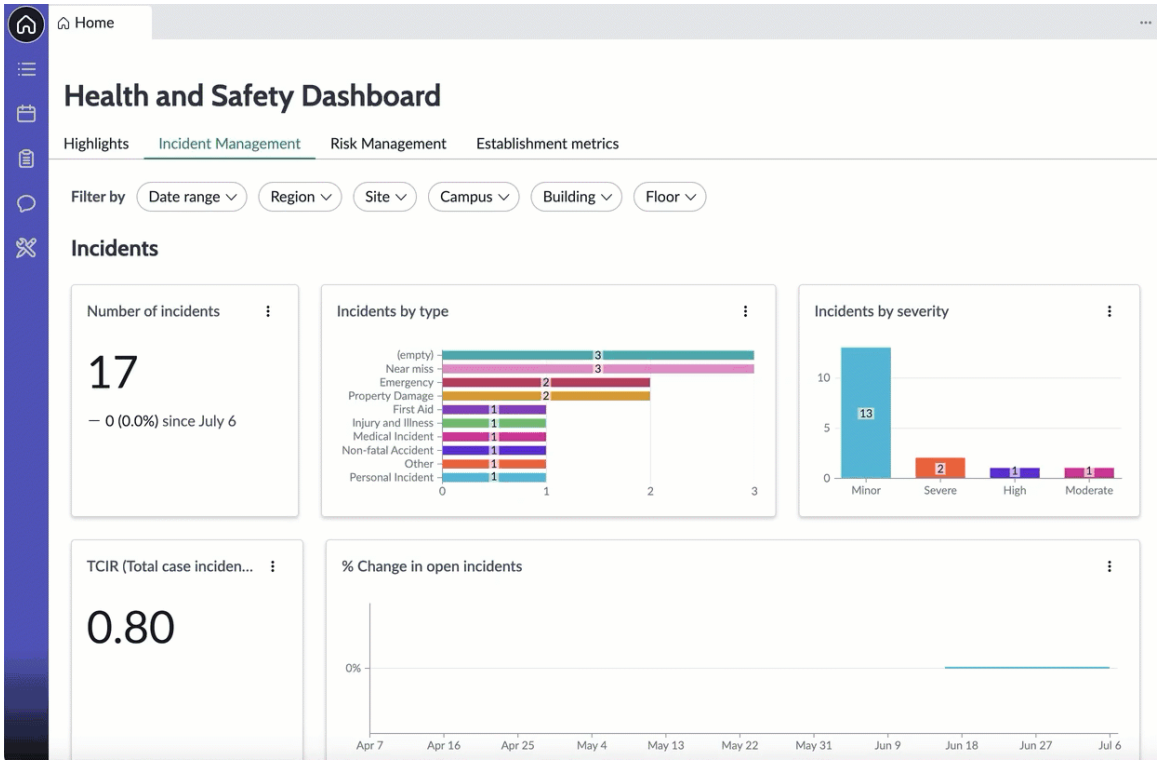

Prerequisites

- Ensure that the Health and Safety Incident Management application is installed. For more information, see Install Health and Safety Incident Management.
- Configure total annual hours for an establishment. For more information, see Add total hours worked for an establishment.
- Run the *[OHS] Safety Metrics* scheduled job to update the safety metrics on demand. For more information, see Configure scheduled job to generate frequency rates.

> **Note:** The *[OHS] Safety Metrics* job is set to run daily by default.

Required roles

- sn_ohs_im.manager, sn_ohs_im.agent, or sn_ohs_im.compliance_manager, needed to see dashboard home page. The metrics on each tab are dependent on the user's access to that table.
- sn_ohs_im.admin and the following roles, to edit the dashboard:
  - pa_admin, to edit the Performance Analytics (PA) components used in the dashboard.
  - ui_builder_admin, to edit the dashboard visualizations that are built using the UI Builder.

Access the Health and Safety Incident Management metrics

Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Incident Management** tab on the Health and Safety dashboard.

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Note:

- To view a high-level summary of key incident metrics such as the total incidents and recordable injuries, select the **Highlights** tab.
- To view top incident metrics with data broken down by each establishment for localized analysis, select the **Establishment Metrics** tab. Use the **Establishment** filter in this tab to show the data by establishment.

Metrics on Incident Management tab

The availability of cards and metrics in this tab depends on the user's access to the table where the data comes from.

Incidents section

Card	Description	PA indicators
Number of incidents	Count of open safety incidents and a one-week trend. Select the card to further drill down and visualize data, for example, see trend over different time aggregation of data.	Health & Safety - Open Incidents
Incidents by type	Breakdown of active safety incidents filtered by incident category, for example, injury/ illness and near miss, to help identify common risks. Select a category in the bar graph to view a complete list of active safety incidents of that type.	None
Incidents by severity	Breakdown of active safety incidents filtered by severity level, for example, major or minor. Select a severity level in the column chart to view a complete list of active safety incidents of that type.	None
TCIR (Total case incident rate)	Number of recordable workplace injuries and illnesses per 100 full-time employees over a one-year period, with the `Location`	• OHS - TCIR (Total Case Incident Rate) • OHS - Total number of Injuries or Illness reported

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Incidents section (continued)

Card	Description	PA indicators
	and `Establishment` breakdowns. The score is calculated according to this formula: `[OHS Total number of Injuries or Illness reported last year from Jan to the end of Dec] * 200000) / [OHS Total Hours Worked Establishment]`	last year - from Jan to the end of Dec • OHS - Total Hours Worked Establishment
% Change in open incidents	Line graph highlighting how the number of open incidents has changed (in percentage) over time, helping identify increase or reduction in reporting or resolution. Select the card to further drill down and visualize data.	• Health & Safety - Open Incidents - % Change • Health & Safety - Open Incidents
Incident near miss ratio	Ratio of safety incidents reported for the **Near miss** category vs total actual incidents (example, ones with injury/illness records) in a calendar year. This metric is useful for assessing proactive safety culture. The score is calculated according to this formula: `[(Health & Safety Near Miss Incidents) / (Health & Safety All Incidents)] * 100`.	• Health & Safety - Near Miss % • Health & Safety - All Incidents • Health & Safety - Near Miss Incidents
Active incidents map	Visual geographic spread on a global map showing where active incidents are occurring across regions or sites. It also shows a count of active incidents on the map at each location. You can zoom into locations within a country (example, state or county) and drill down	None

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Incidents section (continued)

Card	Description	PA indicators
	to a list of incidents at the lowest level.	
Incidents by state	Breakdown of active safety incidents by state, that helps track incident resolution progress. Select a state in the graph to view a complete list of active incidents in that state.	None

Injuries section

Card	Description	Indicators
Recordable injuries this year	Count of injuries deemed recordable that happened in the current year. Select the card to view a complete list of recordable incidents in the year.	None
Days since last injury	Number of days passed since the last injury recorded in the last 12 months, with the `Location` and `Establishment` breakdowns. Select the card to further drill down and visualize data.	• OHS - Days since last injury and illness report opened • OHS - Days since last injury and illness report opened - longest streak • OHS - Days since last injury and illness report opened - average streak • OHS - Total number of lost work days and transferred or restricted days due to injury or illness
Lost days from injury	Line graph showing the count of lost work days and transferred or restricted days due to injury or illness over last 12 months, with the `OHS.Injury.Illness.Classification` and `Establishment` breakdowns.	• OHS - Total number of lost work days and transferred or restricted days due to injury or illness • OHS - Days since last injury and illness report opened

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Injuries section (continued)

Card	Description	Indicators
		• OHS - Days since last injury and illness report opened - longest streak • OHS - Days since last injury and illness report opened - average streak
Injury by category	Breakdown of injuries by category per column to help identify common risks. Select a category in the graph to view a complete list of injuries of that type.	None
Injury by severity	Breakdown of active injuries by severity level per column. Select a severity level in the graph to view a complete list of injuries of that type.	None
LTIR (Lost time case rate)	Number of incidents involving lost work time per 100 full-time workers. This safety metric is used to measure the frequency and severity of workplace injuries/illnesses resulting in employees missing work. The score is calculated according to this formula: `[OHS Total number of Injuries or Illnesses that resulted in days away from work] * 200000) / [OHS Total Hours Worked Establishment]`	• OHS - LTIR (Lost Time Case Rate) • OHS - Total number of Injuries or Illnesses that resulted in days away from work • OHS - Total Hours Worked Establishment
LTIFR (Lost time injury frequency rate)	How often lost-time injuries occur, usually per one million hours worked. The score is calculated according to this formula: `[OHS Total number`	• OHS - LTIFR (Lost Time Injury Frequency Rate) • OHS - Total number of Injuries or Illnesses that

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Injuries section (continued)

Card	Description	Indicators
	`of Injuries or Illnesses that resulted in days away from work] * 1000000) / [OHS Total Hours Worked Establishment]`	resulted in days away from work • OHS - Total Hours Worked Establishment
TRIFR (Total recordable injury frequency rate)	Number of recordable injury/ illness (needed more than just first-aid) per a fixed number of hours worked. The score is calculated according to this formula: `[OHS Total number of Injuries or Illnesses that required professional medical treatment] * 1000000) / [OHS Total Hours Worked Establishment]]`	• OHS - TRIFR (Total Recordable Injury Frequency Rate) • OHS - Total number of Injuries or Illnesses that required professional medical treatment • OHS - Total Hours Worked Establishment
TRSR (Severity rate)	Seriousness of incidents, typically based on lost workdays. This metric measures the severity on injury/illness by calculating the average number of lost workdays and restricted workdays per recordable incident, helping to assess the seriousness of incidents in the given period. The score is calculated according to this formula: `[OHS Total number of lost work days and transferred or restricted days due to injury or illness] * 200000) / [OHS Total Hours Worked Establishment]`	• OHS - TRSR (Severity Rate) • OHS - Total number of lost work days and transferred or restricted days due to injury or illness • OHS - Total Hours Worked Establishment

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Injuries section (continued)

Card	Description	Indicators
TRIR (Total recordable incident rate)	Number of recordable injuries and illnesses per 100 full-time employees over a one-year period. It's a standardized metric used to measure safety through recordable incidents. The score is calculated according to this formula: `[OHS Total number of Injuries or Illnesses that required professional medical treatment] * 200000) / [OHS Total Hours Worked Establishment]`	• OHS - TRIR (Total recordable incident rate) • OHS - Total number of Injuries or Illnesses that required professional medical treatment • OHS - Total Hours Worked Establishment
DART (Days away/restricted or job transfer rate)	Rate of serious incidents resulting in time away from work, restricted duties, or job transfers. It's a standardized metric used to track incidents that resulted in workers being unable to perform their usual duties and needing to take time off or be transferred to lower impact work duties. The score is calculated according to this formula: `([OHS Total number of Injuries or Illnesses that resulted in days away from work] + [OHS Total number of Injuries or Illnesses that resulted in transferred or restricted days]) * 200000) / [OHS Total Hours Worked Establishment]`	• OHS - DART (Days Away/ Restricted or Job Transfer Rate) • OHS - Total number of Injuries or Illnesses that resulted in transferred or restricted days • OHS - Total number of Injuries or Illnesses that resulted in days away from work • OHS - Total Hours Worked Establishment

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Observations section

Card	Description	Indicators
Number of observations	Count of open safety observations including a trend line, with the `Location` breakdown. Select the card to further drill down and visualize data, for example, see trend over different time aggregation of data.	Health & Safety - Open Observations
Overdue corrective actions	Number of corrective type actions that are past their due dates. Select the card to view a complete list of overdue corrective actions.	None
Overdue preventive actions	Number of preventive type actions that are past their due dates. Select the card to view a complete list of overdue preventive actions.	None
Observation status by state	Breakdown of active safety observations by state. Select a state in the graph to view a complete list of active observations in that state.	None
Positive observations reported	Count of positive safety observations that reinforce good practices. Select the card to view a complete list of positive observations.	None
Open corrective and preventive actions	Count of ongoing actions (both corrective and preventive) over time. The line graph includes a line for each action type showing a count of each over time. The score is calculated according to this formula: `[Health & Safety Open Actions] - [Health & Safety`	• Health & Safety - Corrective Actions # • Health & Safety - Open Actions • Health & Safety - Open Corrective Actions • Health & Safety - Open Preventative Actions

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Observations section (continued)

Card	Description	Indicators
	`Open Corrective Actions]` Select the card to further drill down and visualize its data.	
Actions by state	Breakdown of active Health and Safety actions (created for safety incidents and observations) by their current state. Select a state column in the graph to view a complete list of active actions in that state.	None

Customizing widgets

You can customize the widgets in the dashboard to display relevant metrics by using the UI Builder. For more information, see UI Builder tutorial.

Health and Safety Incident Management reference

Learn about the components, such as the roles, tables, plugins, and store applications, that are installed when you install the Health and Safety Incident Management application.

Components installed with Health and Safety Incident Management

Several types of components are installed with installation of the Health and Safety Incident Management application, including tables, user roles, and scheduled jobs. The application also installs related plugins and store applications if they aren't already installed.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Store applications installed

Store apps installed with Health and Safety Incident Management

Store application	Description
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.

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Store apps installed with Health and Safety Incident Management (continued)

Store application	Description
Health and Safety Incident Management PA Content Pack	Generates the safety frequency rate metrics on the Health and Safety Workspace landing page.
Workplace Core [sn_wsd_core]	Enables workplace locations for Health and Safety Incident Management. **Important:** The application installation doesn't install the location demo data for the Workplace Core location model. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.

Roles installed

Roles in Health and Safety Incident Management

Role title [name]	Description	Contains roles
Safety agent [sn_ohs_im.agent]	Agent for Health and Safety teams who can: • View the overall status of safety incidents and observations • Work on safety incidents and observations to resolve them	• sn_ohs_im.incident_writer_restricted • workspace_user • sn_ohs_im.report_mapping_reader • sn_wsd_core.location_reader • sn_ohs_im.workspace_user • sn_ohs_im.incident_reader • canvas_user • sn_ohs_im.establishment_reader • sn_hs_cm.case_reporter • sn_ohs_im.observation_writer_restricted • sn_ohs_im.reporter • sn_ohs_im.action_reader • sn_ohs_im.action_writer_restricted • sn_ohs_im.observation_reader • sn_hs_cm.case_writer
Safety executive [sn_ohs_im.executive]	Executive who can: • Access the Health and Safety executive landing page	• workspace_user • sn_ohs_im.report_mapping_reader • sn_wsd_core.location_reader • sn_ohs_im.workspace_user • sn_ohs_im.incident_reader • canvas_user

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Roles in Health and Safety Incident Management (continued)

Role title [name]	Description	Contains roles
	• View safety metrics to gain insight into how the safety team and company are performing in terms of safety • View the overall status of safety incidents and observations • Drill down into details	• sn_ohs_im.establishment_reader • sn_ohs_im.reporter • sn_ohs_im.action_reader • sn_ohs_im.observation_reader
Safety manager [sn_ohs_im.manager]	Manager for Health and Safety teams who can: • View the overall status of safety incidents and observations • Assign safety incidents and observations to safety agents • Work on safety incidents and observations to resolve them	• sn_ohs_im.observation_manager • workspace_user • sn_ohs_im.action_manager • sn_ohs_im.incident_manager • sn_ohs_im.report_mapping_reader • sn_ohs_im.workspace_user • canvas_user • sn_ohs_im.establishment_reader • sn_hs_cm.case_reporter • sn_ohs_im.reporter • sn_hs_cm.case_manager
Safety operations manager	Line manager or supervisor who can:	• sn_ohs_im.requestor • sn_wsd_core.location_reader

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Roles in Health and Safety Incident Management (continued)

Role title [name]	Description	Contains roles
[sn_ohs_im.operations_manager]	• View Health and Safety operations landing page • View the overall status of safety incidents and observations • Report safety incidents and observations from Health and Safety Workspace • Work on safety incidents and observations	• workspace_user • canvas_user • sn_ohs_im.incident_writer_restricted • workspace_user • sn_ohs_im.report_mapping_reader • sn_wsd_core.location_reader • sn_ohs_im.workspace_user • sn_ohs_im.incident_reader • canvas_user • sn_ohs_im.establishment_reader • sn_ohs_im.observation_writer_restricted • sn_ohs_im.reporter • sn_ohs_im.action_reader • sn_ohs_im.action_writer_restricted • sn_ohs_im.observation_reader
Critical event agent [sn_critical.agent]	Works on critical event records from initiation to resolution.	• sn_comm_management.comm_plan_manager • task_editor • canvas_user • sn_ohs_im.workspace_user • sn_critical.read

Tables installed

Tables installed with Health and Safety Incident Management

Table	Description
Annual information [sn_ohs_im_annual_information]	Stores annual information for an establishment.
Health and Safety establishment [sn_ohs_im_establishment]	Stores establishment information for an organization . The establishment records are used to group injury and illness records for auto-filling reports such as OSHA 300, 300A, and 301 forms.

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Tables installed with Health and Safety Incident Management (continued)

Table	Description
Health and Safety incident [sn_ohs_im_incident]	Stores all safety incident records reported by employees that have happened in the workplace. This table extends the Health and Safety task [sn_ohs_im_task] table.
Regional details [sn_ohs_im_injury_region_data]	Stores all region specific information.
People involved [sn_ohs_im_involved_party]	Stores all logged people involved with investigation s. People can be existing [sys_users] or external, for example, contracts and on-site visitors.
Periodic total work hour [sn_ohs_im_periodic_work_hour]	Stores periodic total hours of work per year per establishment.
Health and Safety observation [sn_ohs_im_observation]	Stores all safety observations records reported by employees in their workplace. This table extends the Health and Safety task [sn_ohs_im_task] table.
Health and Safety incident observation [sn_ohs_im_m2m_incident_observation]	Stores all safety observation records linked to the incidents that are reported by employees in the their workplace.
Injury [sn_ohs_im_injury]	Stores all logged injuries associated with all injury and illness reports. A custom Seismic component is available to log injuries.
Injury and illness [sn_ohs_im_injury_illness]	Stores all logged injuries and illness records. Information tracked in this table can be used for generating reports such as OSHA forms.

Injury and illness fields

Safety managers and agents can use the Injury and illness form to log an injury or illness. A safety compliance manager can access an injury and illness report and mark it as recordable for reporting purposes. They can also use it to generate the injury and illness reports.

For more information, see Log an injury and illness.

Injury and illness form

Field	Description
Person	
Person type	Type of the person who's injured or ill.

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Injury and illness form (continued)

Field	Description
	• **Employee**: An employee of the organization where this injury happened. • **Visitor**: A person from outside the organization who came to the site as a visitor. • **Public**: A person from public who was present at the site of safety incident or observation. • **Contractor**: A contract worker from a contractor company who came to the site to perform required tasks. This option appears only when the Health and Safety Contractor Management (sn_hs_crm) application is installed on your instance.
Employee	Name of the employee who's injured or ill. This field appears only when **Employee** is selected from **Person type**. **Tip:** If an incident affected more than one person, you must create an injury and illness report for each.
Visitor	Name of the visitor who's injured or ill. This field appears only when **Visitor** is selected from **Person type**. **Note:** This field only lists visitors who have Health and Safety profile assigned to them. For more information, see Add a Health and Safety visitor.
Name	Name of the public person who's injured or ill. This field appears only when **Public** is selected from **Person type**.
Contractor	Name of the contract worker who's injured or ill. This field appears only when **Contractor** is selected from **Person type**. **Note:** This field only lists users who have the [snc_external] role assigned to them and have their Health and Safety profile created. For more information, see Assign Health and Safety profile to a user.
Redact name	Option to redact the employee's name from the record, if there's a privacy concern. Redacting protects the privacy of the affected employee. When this option is selected for a recordable injury and illness, the employee's name is redacted from any reports that are generated, such as an OSHA form. Their name is replaced with the **Privacy concern case** on the generated reports.
Sensitive content	Option that indicates that the incident contains sensitive information. Only a user with the Sensitive content user role can view a report marked as sensitive. For more information on roles, see Components installed with Health and Safety Incident Management.

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Injury and illness form (continued)

Field	Description
	Note: When you generate a report (such as OSHA 300 or 300A), it contains all incidents, including the ones marked as sensitive, according to the template. However, sensitive information is not disclosed in the report as incident details are not included.
Establishment	Name of the establishment where this injury or illness happened. When a safety compliance manager generates a report, such as an OSHA form, only records with an assigned establishment are included.
Healthcare	
Treatment administered offsite	Option to indicate if the treatment for the injury or illness is provided outside the workplace. When this option is selected, all other fields in the **Healthcare** section become available.
Name of physician or other healthcare professional	Name of the physician or healthcare professional providing the treatment.
Facility	Name of the hospital where the treatment is provided.
Facility address	Address of the hospital where the treatment is provided.
Treated in emergency room	Option to indicate that the treatment is provided in an emergency room.
Hospitalized overnight	Option to indicate whether the employee spent the night in the hospital.
Injury and illness details	
Ensure that this section doesn't contain any personal information that can identify the affected employee.	
Number	Auto-generated number for the injury and illness record.
Incident	Safety incident associated with this injury and illness. This field is auto-populated with the safety incident number the injury and illness report is created from.
Classification	Classification for this injury and illness.
OSHA injury type	Type of the injury or illness. This field appears only when the Health and Safety Incident Management OSHA Content Pack (com.snc.sn_hs_im_osha) application is installed on your ServiceNow instance.

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Injury and illness form (continued)

Field	Description
Date and time employee began work	Time when the employee starting working before this injury or illness.
Date and time of injury or illness	Date and time when this injury or illness happened.
Days away from work	Number of days the injured employee has been away from work.
Days job transfer or restriction	Number of days the injured employee is restricted in performing their tasks or transferred to another lower impact job, for example, until they are ready to return to their original job.
Recordable	Option that indicates that this injury or illness is recordable for any reporting purpose. Only a safety compliance manager can edit this field. Only records marked as recordable are included when you generate a report, such as an OSHA form. For example, see Pre-requisites for generating OSHA forms.
Unsure of time	Option to indicate that the time of this injury or illness isn't available.
HRSD case record	HR case related to this injury. This field appears only when the following conditions are met: • Health and Safety Case Management (sn_hs_cm) application and the Human Resources Scoped App: Core (com.sn_hr_core) plugin are installed on your ServiceNow instance. • Safety case manager [sn_hs_cm.case_manager] role assigned to you. • **Employee** is selected in the **Person type** field. For more information, see Create an HR case from an injury or illness.
RTW case record	Return to Work case related to this injury. The injury record is auto-populated in the **Injury and illness** tab of the selected case. For more information, see Health and Safety case. This field appears only when the following conditions are met: • Health and Safety Case Management (sn_hs_cm) application is installed on your ServiceNow instance. • Safety case manager [sn_hs_cm.case_manager] role assigned to you. • **Employee** is selected in the **Person type** field. However, the field doesn't appear when the Human Resources Scoped App: Core (com.sn_hr_core) plugin is also installed on the instance. For more information, see Create a return to work case from an injury or illness.
Injury type	Type of injury or illness.
What was the injury?	

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Injury and illness form (continued)

Field	Description
What was the injury?	Section where you can select injured body parts and add their details. This field is available only after you click **Save** in the record.
Front	Visual injury picker where you can add injuries on the front parts of a human body. Select a body part to select **Severity** and **Affected body part**, and add **Description** about the injury or illness. To add multiple injury types to the same body part, select **Add New Injury** and fill in the fields.
Back	Visual injury picker where you can add injuries on the back parts of a human body. Select a body part to select **Severity** and **Affected body part**, and add **Description** about the injury or illness. To add multiple injury types to the same body part, select **Add New Injury** and fill in the fields.
Attachments	
Attachments	Section where you can add attachments related to this injury and illness. If this injury and illness is marked as recordable, all reports generated for it (such as the OSHA 301 form) are available in this area. For more information, see Generate an OSHA 301 form.

People Involved form

Safety managers and agents can use the People involved form to add or modify an involved person in a safety incident or observation assigned to them.

People involved form

Field	Description
Person type	Type of the person involved in the safety incident or observation. If an incident or observation involves more than one person, you must add a record for each. • **Employee**: An employee of the organization where the safety incident or observation happened. • **Visitor**: A person from outside the organization who came to the site as a visitor. • **Public**: A person from public who was present at the site of safety incident or observation. • **Contractor**: A contract worker from a contractor company who came to the site to perform required tasks. This option appears only when the Health and Safety Contractor Management (sn_hs_crm) application is installed on your instance.
Employee	Name of the employee involved. This field appears only when **Employee** is selected from **Person type**.

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People involved form (continued)

Field	Description
Visitor	Email id of the visitor involved. This field appears only when **Visitor** is selected from **Person type**. **Note:** This field only lists visitors who have Health and Safety profile assigned to them. For more information, see Add a Health and Safety visitor.
Contractor	Name of the contract worker involved. This field appears only when **Contractor** is selected from **Person type**. **Note:** This field only lists users who have the [snc_external] role assigned to them and have their Health and Safety profile created. For more information, see Assign Health and Safety profile to a user.
Association	Type of involvement of the person. • **Witness**: A person who was present at the safety incident or observation described. • **Injured party**: A person who got injured in the incident. This option appears only for the Employee and Visitor person type. • **Safety team**: A person from safety team handling the investigation of the incident. • **Collaborator**: A person who's collaborating in any in the investigation of this incident or observation. • **Involved**: A person who's involved in any other way with this incident or observation.
Name	Name of the person involved. For a public person, enter the name. This field is available only when the **Public** option is selected from **Person type**. For a visitor, the name is auto-populated from the visitor profile.
Phone	Phone number of the involved person. For a public person, enter the phone number. This field is available only when the **Public** option is selected. For an employee or visitor, the phone number is auto-populated from the user or visitor profile.
Email	Email ID of the involved person. For a public person, enter the email ID. This field is available only when the **Public** option is selected. For an employee or visitor, the email ID is auto-populated from the user or visitor profile.

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People involved form (continued)

Field	Description
Preferred contact method	Method to contact the involved person such as email or phone number.

Domain separation and Health and Safety Incident Management

Domain separation is supported for Health and Safety Incident Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Domain-separated tables overview

All tables in the Health and Safety Incident Management can be domain-separated and include the required domain separation field.

How domain separation works in Health and Safety Incident Management

- Each table in Health and Safety Incident Management includes the domain separation fields **Domain** and **Domain path**.
- Customer can use these fields to configure domain separation in their implementation of Health and Safety Incident Management.

Related topics

Domain separation for service providers

Health and Safety injury and illness reports

As a compliance manager, you need to report on employee incidents related to the health and safety. With Health and Safety Incident Management, you can export reports for safety incidents and the injuries and illnesses that occurred in your organization.

To enable this reporting capability for Health and Safety Incident Management, you additionally need to install the relevant reporting application. For example, to enable the Occupational Safety and Health Administration (OSHA) reporting, you must install the Health and Safety Incident Management OSHA Content Pack (com.snc.sn_hs_im_osha) application.

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You can also generate a report for an injury and illness using your own PDF templates for your regional or industry-specific requirements.

You can also generate a report for an injury and illness by directly uploading your regional or industry-specific reporting PDF templates into the application. For more information, see Create a safety report field mapping for generating reports and Generate a report for a safety incident, observation, or injury.

Manage the list of establishments

Manage the establishment list for your organization. The recordable injury and illness records are grouped using this establishment information for auto-filing and exporting the reports such as OSHA 300 and 300A forms.

Before you begin

Role required: sn_ohs_im.compliance_manager

About this task

You can view the exported reports, such as OSHA 300 and 300A forms, for an establishment by navigating to the establishment record in the list. For more information, see View a saved OSHA 300 and 300A form.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, under the **Establishments** list, select **All**.
   - To add an establishment record, select **New**.
   - To edit an existing establishment record, select the establishment and select **Edit**.
4. On the form in **Details** tab, fill in the fields.

Health and Safety establishment

Field	Description
Industry code	Code indicating the industry that an establishment belongs to based on its business activities. For example, ○ Standard Industrial Classification (SIC) codes assigned by the United States government to establishments ○ North American Industry Classification System (NAICS) codes for establishments in Canada, the United States, and Mexico
Industry description	Brief description about the primary business and business activities of an establishment.

5. Select **Save**.
   The **Annual information** tab appears for the establishment.

Result

This establishment is available in the **Establishment** field's list on an injury and illness report.

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What to do next

In the **Annual information** tab, add the annual total hours worked for this establishment. For more information, see Add total hours worked for an establishment.

Add total hours worked for an establishment

Add the total hours worked for an establishment annually.

Before you begin

Role required: sn_ohs_im.compliance_manager

About this task

Note: The annual total hours information is used for auto-filing the total hours worked by employees in a year when exporting the injury and illness reports for an establishment, for example OSHA 300A form. When the total hours information is not available for a year in the **Annual information** tab, the system uses the default value from the *Total hours worked* system property in the exported report. For more information, see Property to set employee hours worked.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon ().
3. In the **Lists** tab, under the **Establishments** list, select **All**.
4. Select to open the establishment record to add the total hours worked to.
5. In the **Annual information** tab, select **New**.
6. In the **Year** field, enter the year to add the total hours for and select **Save**.
   The **Periodic total work hours** tab appears for the year.
7. In the **Periodic total work hours** tab, add the hours worked for each time period in the year.
   a. Select **New**.
   b. Select start date and end date for the period.
   c. In the **Total hours worked** field, enter the total hours worked for the selected period.
   d. Select **Save**.
8. **Optional:** Repeat step 7 to add the required number of periods and their hours worked.
9. Select **Save**.

Result

- All periodic hours logged for a year are listed in the **Periodic total work hours** tab of the year.
- All periodic hours for a year add up to the annual total hours worked for that year. The total hours worked for a year are listed in the **Total hours worked** column under the **Annual information** tab.

Health and Safety Incident Management OSHA Content Pack

With the ServiceNow® Health and Safety Incident Management OSHA Content Pack application, you can automatically fill and export OSHA forms for injuries and illnesses that happened in an establishment under your organization.

The Occupational Safety and Health Administration (OSHA) is part of the United States Department of Labor, which sets and enforces protective workplace safety and health standards.

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Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Pre-requisites for generating OSHA forms

Before you start the OSHA form generation, you must complete the following tasks.

- Set up Health and Safety Incident Management OSHA Content Pack.
- Review and set the following fields in the injury and illness reports for which the OSHA forms should be generated.
  - **Recordable**: When you generate an OSHA form, only the recordable incidents are included.
  - **Establishment**: Ensure that this field is populated with the establishment name.
- Ensure that you have the safety compliance manager [sn_ohs_im.compliance_manager] role assigned to you.

Setting up the OSHA Content Pack

Set up the Health and Safety Incident Management OSHA Content Pack application to enable the generation of OSHA forms.

The following table gives an overview of the required configuration tasks.

Tasks to configure OSHA forms

Task	Description
Install Health and Safety Incident Management OSHA Content Pack	Install the Health and Safety Incident Management OSHA Content Pack application on your ServiceNow instance that has Health and Safety Incident Management.
Manage establishment list	Update the establishment list for your organization. The OSHA recordable injury and illness records are grouped using this establishment information.
Update saved PDF templates for OSHA forms	Check if the saved PDF templates for the OSHA 300, 300A, and 301 forms are updated. The application includes preconfigured PDF templates and their sys_ids for OSHA forms, and can be customized if changes to the OSHA form PDF files are required.
Configure OSHA system properties	Modify the OSHA base system properties, if required, to configure PDF templates for OSHA forms.

Install Health and Safety Incident Management OSHA Content Pack

You can install the Health and Safety Incident Management OSHA Content Pack application (com.snc.sn_hs_im_osha) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Incident Management OSHA Content Pack application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Health and Safety Incident Management OSHA Content Pack:

- Tables
- System Properties

For more information, see Components installed with Health and Safety Incident Management OSHA Content Pack and Health and Safety Incident Management OSHA Content Pack properties.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Incident Management OSHA Content Pack application (com.snc.sn_hs_im_osha) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Update an OSHA form PDF template

Update a saved OSHA form PDF template if changes to an OSHA form PDF file are required.

Before you begin

Role required: sn_ohs_im.admin or sn_ohs_im.agent

About this task

PDF templates for OSHA forms are required to fill and export OSHA forms for safety incidents and the injuries and illnesses that happened in your organization.

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The Health and Safety Incident Management OSHA Content Pack includes preconfigured PDF templates and associated sys_ids for OSHA 300, 300A, and 301 forms. However, if changes to the OSHA form PDF files are needed, they can be updated.

Procedure

1. Upload the new OSHA form PDF template file.
   a. Select **All**.
   b. In the navigation filter, enter `sn_hs_im_osha_template.list` and press the Enter key. The HS OSHA PDF template [sn_hs_im_osha_template] table opens and a list of all the available PDF templates for OSHA forms appears.
   c. Select the template that you need to update.
   d. Select **Manage attachments** and delete the old PDF template file and upload the new PDF template file.
   For more information on managing attachments, see Manage attachments.
   e. Select **Update**.
2. Activate the uploaded OSHA form PDF template file and copy its sys_id.
   a. Select **All**.
   b. In the navigation filter, enter `sys_attachment.list` and press the Enter key.
   c. In the list, select the PDF template file attachment that you uploaded in step 1.
   d. Set its **State** value as Available.
   e. Right-click the PDF template file attachment and select **Copy sys_id**.
3. Update the sys_id of the OSHA form PDF template file in the corresponding system property.
   a. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
   b. Select the corresponding system property for the OSHA form PDF template that you updated.
   For information on the OSHA form PDF template system properties, see Health and Safety Incident Management OSHA Content Pack properties.
   c. Update the sys_id that you copied in step 2.
   d. Select **Save**.

Result

The new OSHA form PDF template is available and is used when exporting the corresponding OSHA form.

Generate an OSHA 301 form

Generate an OSHA 301 form for an injury or illness associated with a safety incident.

Before you begin

Ensure that the following conditions are met.

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- The Health and Safety Incident Management OSHA Content Pack (com.snc.sn_hs_im_osha) application is installed on your ServiceNow instance.
- The **Recordable** option is selected on the injury and illness report.

Role required: sn_ohs_im.compliance_manager

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
   The Health and Safety Workspace opens in a new tab of the browser window.
2. Select the incident management icon () and navigate to the **Lists** tab.
3. Open the injury an illness report from a safety incident or from the injury and illness list.

Option	Steps
From a safety incident	**a.** In the **Safety Incidents** list, select **All**. **b.** In the list, select the incident that you want to generate the OSHA 301 form for. **c.** Select the **Report an incident** tab to open the playbook. **d.** In the **Add injury and illness** activity, select the injury and illness report to generate the OSHA 301 form for.
From an injury and illness list	**a.** In the **Injury / illnesses** list, open the report list. For example: ▪ For reports marked as recordable, select **Recordable**. ▪ For all reports, select **All**. **b.** In the list, open the injury and illness report that you want to generate the OSHA 301 form for.

4. Review the injury and illness report and select the **Recordable** option.
   For more information, see Injury and illness fields.
5. Select **Generate OSHA 301 form**.
6. In the **Generate OSHA 301 form** dialog box, select the file format to generate the form in, for example, CSV or PDF.
7. Select **Generate**.

Result

- The OSHA 301 form is generated using the saved template for OSHA 301 form and is available in the **Attachments** section of the incident.
- The OSHA 301 template is automatically filled with the information available in the injury and illness report.

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Generate an annual OSHA 300 Log or 300A Summary form

Generate an annual 300 Log or 300A Summary OSHA form for all OSHA recordable injuries and illnesses that happened in an establishment between January 1 and December 31 of a calendar year.

Before you begin

Ensure that the following conditions are met.

- The Health and Safety Incident Management OSHA Content Pack (com.snc.sn_hs_im_osha) application is installed on your ServiceNow instance.
- The following fields are set in the incidents' injury and illness reports that should be included in the OSHA form.
  - The **Recordable** option is selected. When you generate an OSHA form, only the recordable incidents are included.
  - The **Establishment** field contains the establishment name.

Role required: sn_ohs_im.compliance_manager

About this task

The OSHA 300 Log and 300A Summary forms are generated per establishment per year.

For the PDF export format, the system uses the saved PDF templates for OSHA 300 and 300A forms and fills them with the values from the recordable injury and illness reports.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the incident management icon () and navigate to the **Lists** tab.
3. In the **Lists** tab, under the **Injury / illnesses** list, open a report list.
   - For reports marked as recordable, select **Recordable**.
   - For all reports, select **All**.
4. For the injury and illness reports, review the **Recordable** column.
5. Select **Generate OSHA forms**.
6. In the Generate OSHA form dialog box, fill in the fields.

Generate OSHA form dialog box

Field	Description
Form type	Type of OSHA form. ○ **OSHA 300 Log**: Log of all work-related injuries and illnesses. ○ **OSHA 300A Summary**: Summary of all work-related injuries and illnesses.
Establishment	Establishment to generate the form for. The form includes all OSHA recordable injuries and illnesses that happened in the selected establishment.

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Field	Description
	Note: In OSHA 300A form, the total hours worked by employees are auto-filled from the establishment's annual information. However, when the total hours information is not available for the selected year for this establishment, the system uses the default value from the Total hours worked system property in the report. For more information, see Manage the list of establishments.
File type	Type of the file the OSHA form is generated in —CSV or PDF.
Year	Calendar year to generate the form for. The form includes all OSHA recordable injuries and illnesses that happened between January 1 and December 31 of the selected calendar year.

7. Select **Generate**.
8. **Optional:** In the Generate OSHA form dialog box, select the OSHA form name link to download its PDF file.

Result

- The OSHA form is generated according to the selected form type and file type.
  - If the selected file type is PDF, the system uses the saved OSHA 300 and 300A PDF templates and automatically populates them with values from recordable injury and illness reports.
  - If the selected file type is CSV, the form is generated in CSV format.
- The generated OSHA report contains all incidents, including the ones marked as sensitive, according to OSHA template. However, sensitive information is not disclosed in the form as incident details are not included.
- The filled-in OSHA form is saved in the selected establishment.

What to do next

You can view the saved OSHA form by navigating to the **Establishments** list. For more information, see View a saved OSHA 300 and 300A form.

View a saved OSHA 300 and 300A form

View a saved OSHA 300 and 300A form for an establishment.

Before you begin

Role required: sn_ohs_im.compliance_manager

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
   The Health and Safety Workspace opens in a new tab of the browser window.

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2. Select the incident management icon ().
3. In the **Lists** tab, under the **Establishments** list, select **All**.
4. Select an establishment record to open it.
5. In the **Attachments** section, select the required OSHA form PDF file to open it.

Health and Safety Incident Management OSHA Content Pack reference

Learn about the components, such as the tables and system properties that are installed when you install the Health and Safety Incident Management OSHA Content Pack application.

Components installed with Health and Safety Incident Management OSHA Content Pack

Several types of components are installed with installation of the Health and Safety Incident Management OSHA Content Pack application, including tables and system properties.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Tables installed

Tables installed with OSHA content pack

Table	Description
HS OSHA PDF template [sn_hs_im_osha_template]	Stores OSHA form PDF template records that are required for OSHA form generation. The PDF templates are installed and preconfigured when you install the application.

Health and Safety Incident Management OSHA Content Pack properties

Properties that you can use to configure PDF templates for OSHA forms.

These properties are available for the Health and Safety Incident Management OSHA Content Pack application and are preconfigured for the OSHA form PDF templates available with this application. However, if you've updated the PDF templates, you must update their sys_ids in the corresponding system properties. For more information, see Update an OSHA form PDF template.

Properties for Health and Safety Incident Management OSHA Content Pack

Property	Description
sn_hs_im_osha.osha_300a_form_pdf_template_sys_id	This property contains the sys_id of the OSHA 300A form PDF template. If you've updated the PDF template for OSHA 300A form, you must update its sys_id in the **Value** field in this property.

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Properties for Health and Safety Incident Management OSHA Content Pack (continued)

Property	Description
	• Type: string • Default value: fad3312c77920110dffcf2babc5a99c3 • Location: **All** > **Health and Safety** > **Health and Safety administration** > **Properties**
sn_hs_im_osha.osha_300_form_pdf_template_sys_id	This property contains the sys_id of the OSHA 300 form PDF template. If you've updated the PDF template for OSHA 300 form, you must update its sys_id in the **Value** field in this property. • Type: string • Default value: edf1d554772b1110173cf2babc5a9902 • Location: **All** > **Health and Safety** > **Health and Safety administration** > **Properties**
sn_hs_im_osha.osha_301_form_pdf_template_sys_id	This property contains the sys_id of the OSHA 301 form PDF template. If you've updated the PDF template for OSHA 301 form, you must update its sys_id in the **Value** field in this property. • Type: string • Default value: 4a384fe977660110dffcf2babc5a999e • Location: **All** > **Health and Safety** > **Health and Safety administration** > **Properties**

Health and Safety Case Management

The ServiceNow® Health and Safety Case Management application provides capabilities to support employees' health and safety inquiries and their return to work after an injury or illness.

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Get started

Explore  Learn how workers, line managers, and safety personnel use Health and Safety Case Management .	Configure  Set up Health and Safety Case Management.	Ask Safety question  Submit health and safety related questions to safety team.
Resolve cases  Manage Health and Safety cases.	Reference  Get details about components such as roles, tables, and store applications that are installed.	

Troubleshoot and get help

- Ask questions and explore other resources for Health and Safety Case Management in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Health and Safety Case Management

Learn more about Health and Safety Case Management and review the benefits it can provide for different users in your organization.

Health and Safety Case Management overview

With Health and Safety Case Management, employees can ask health and safety questions, line managers can plan employees' returning to work after an injury or illness, and the safety team can work on these health and safety cases to resolve them.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

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Health and Safety Case Management users

Users

User	Description
Employee	• Raise health and safety inquiries, such as leaves due to safety incidents or organization's health and safety procedures. • Submit compensation claims for work related incidents.
Line manager	Submit cases related to return of an employee to work considerations.
Safety team	Work on safety cases and the related safety incidents or injuries.

Health and Safety Case Management workflow

1. Health and safety cases are submitted to the safety team in one of the following ways:
   - Employees submit health and safety related questions from the Employee Center.
   - Safety case manager creates cases based on questions received from employees or their line managers.
   - Safety agent (with RTW case manager role), working on safety incidents or injuries, creates return to work cases for employees returning to work after an injury or illness. They can also create HR cases for any assistance from the HR department.
2. Safety case manager works on safety cases to provide information and resolve employees' questions related to health and safety. If it's a return to work case, they can assess the employee's capability to work before they return from their injury or illness.

Health and Safety Case Management benefits

Key features of Health and Safety Case Management and their benefits

Benefit	Feature	Users
Support employees for their health and safety related inquiries.	Health and safety questions	Employee
Support for employees returning from time-off due to injury or illness. • Time to return to work • Successful return to work	Return to work	• Line manager • Employee
Ensure employees are adequately compensated for their injuries in the workplace.	Compensation claims	• Line manager • Employee

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Key features of Health and Safety Case Management and their benefits (continued)

Benefit	Feature	Users
Enable creation of HR case from within the safety incidents to handle any communication with the HR department.	HR case for an injury	• Safety team • Human Resources team
Enable creation of return to work case from within the safety incidents to handle the return to work process for the injured person.	Return to work case for an injury	• Line manager • Safety team
Enable safety team to create cases to address internal workflows while associating them with the employee for records and communication.	Health and safety case	Safety team

What to explore next

To learn more about configuring and using Health and Safety Case Management, see:

- Configuring Health and Safety Case Management
- Submitting Health and Safety cases
- Work on a Health and Safety case
- Health and Safety Case Management reference

Configuring Health and Safety Case Management

Set up your implementation for Health and Safety Case Management by installing the application and reviewing and configuring the components that are installed with the application.

Configuration overview

Install Health and Safety Case Management

You can install the Health and Safety Case Management application (sn_hs_cm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Case Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Health and Safety Case Management:

- Plugins
- Store applications

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- Roles
- Tables

For more information, see Components installed with Health and Safety Case Management.

Optional applications for additional features in Health and Safety Case Management

Application	Description
Health and Safety Incident Management [sn_hs_im_incident]	Installs safety-related employee incidents and observations capability for Health and Safety Case Management. For more information, see Install Health and Safety Incident Management.
Human Resources Scoped App: Core [com.sn_hr_core]	Installs Case and Knowledge Management for creating HR cases from injury and illness records in Health and Safety Incident Management. • For more information on activating it, see Activate Case and Knowledge Management. • For information on creating HR cases from injury and illness records, see Create an HR case from an injury or illness.
Universal Request [com.snc.universal_request]	Installs Universal Request application that supports cross-departmental collaboration and unified employee experience. For more information, see Universal Request for Health and Safety cases.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Case Management application (sn_hs_cm) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Configure HR service for creating an HR case for an injury

Configure the HR service that you want to use for creating HR cases for injuries and illnesses.

Before you begin

Ensure that the following conditions are met:

- The Human Resources Scoped App: Core (com.sn_hr_core) plugin is installed on your ServiceNow instance. For more information on activating it, see Activate Case and Knowledge Management.
- The application scope is selected as Health and Safety Case Management. For more information, see Application picker.

Role required: sn_hs_cm.case_manager and sn_hr_core.admin

About this task

For information on HR services and what you can configure, see HR services.

Procedure

1. Copy the sys_id of the HR service.
   a. Navigate to **All** > **HR Administration** > **HR Services** > **HR Service Configuration**.
   b. In the list, select the HR service that you want to use for creating HR cases from injury and illness records.
   c. Right-click the HR service and select **Copy sys_id**.
2. Update the sys_id of the HR service in the system property.
   a. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
   b. In the **HR Service sys_id** (*sn_hs_cm.hr_service_sys_id*) property, update the sys_id that you copied in step 1.
   c. Select **Save**.

Submitting Health and Safety cases

Safety case manager can begin the resolution process by creating cases based on questions received from employees. Employees can also directly ask a health and safety-related questions from the Employee Center. They can fill out the Health and Safety question form, select an appropriate category for their question, and then submit it.

- Ask a Health and Safety question from Employee Center

  As an employee, ask a health and safety question from the safety department to request information such as health and safety procedures, training, or return to work.

- Create a safety case from Health and Safety Workspace

  As a safety case manager, create a case based on questions received from employees or their line managers.

- Create a return to work case from an injury or illness

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As a safety agent working on a safety incident or an injury, create a return to work case for an employee who's returning to work after an injury or illness.

- Create an HR case from an injury or illness

  As a safety agent working on a safety incident or an injury, create an HR case for an employee who is on leave because of an injury or illness or needs any other assistance from the HR department.

Ask a Health and Safety question from Employee Center

Ask a health and safety question from the safety department to request information such as health and safety procedures, training, or return to work.

Before you begin

Role required: sn_hs_cm.case_reporter

About this task

Employees can also submit safety related questions from their mobile device using the ServiceNow® Now Mobile app.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, select the **Health and Safety** menu and then **Ask a Health and Safety Question**.
3. On the form, fill in the fields.
   a. Select an appropriate category for your question, such as **General inquiry** and **Injury / Incident related leave**.
   b. Add a related safety incident, if any.
4. **Optional:** If necessary, attach an image related to your question using the add attachments icon ( ).
5. Select **Submit**.

Result

- Based on the selected category of your question, a safety case is submitted in the Open state. To view and track the updates to your question, navigate to the **My Requests** list in the Employee Center and open the record.

  Note: If you selected someone else in the **Requested For** field to submit this question for, the case won't appear in your **My Requests** list. Instead, it appears in the **My Requests** list of the person you selected.

- The safety case is also listed in the Cases list on Health and Safety Workspace. A safety case manager [sn_hs_cm.case_manager] can view all the filed questions and requests by navigating to the Health and Safety Workspace and selecting the cases icon ( ). For more information, see Work on a Health and Safety case.

Submit a safety compensation claim

Submit a compensation claim for a work-related incident or injury.

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Before you begin
Role required: sn_hs_cm.case_reporter

About this task
Employees can also submit safety-related compensation claims from their mobile device using the ServiceNow® Now Mobile app.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, select the **Health and Safety** menu and then **Submit a compensation claim**.
3. On the form, fill in the fields.
   a. If you're submitting this claim for someone else, select the person.
   b. Add a related safety incident, if any.
   c. Enter the total claim amount and a reason for the claim.
4. **Optional:** If necessary, attach an image related to the claim using the add attachments icon ( ).
5. Select **Submit**.

Result
- A safety case for the compensation claim is submitted in the Open state. To view and track the updates to your claim, navigate to the **My Requests** list in the Employee Center and open the record.

  Note: If you selected someone else in the **Requested For** field to submit this claim for, it doesn't appear in your **My Requests** list. Instead, it appears in the **My Requests** list of the person you selected.

- The safety case is also listed in the Cases list on Health and Safety Workspace. A safety case manager [sn_hs_cm.case_manager] can view all the submitted requests by navigating to the Health and Safety Workspace and selecting the cases icon ( ). For more information, see Work on a Health and Safety case.

Create a safety case from Health and Safety Workspace

Begin the resolution process by creating cases based on questions received from employees.

Before you begin
Role required: sn_hs_cm.case_manager, sn_hs_cm.case_writer, or sn_hs_cm.rtw_writer

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the cases icon ( ) to open the **Cases** tab.
3. In the **Lists** tab, select **Cases** and then **All**.
4. Select **New** to create a safety case.
5. On the form, fill in the fields.
   For information about safety case form fields, see Health and Safety case form.

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6. If it's a return to work case, enter details related to the employee's return to work after an injury or illness in the **Return to work details** section.
   This section appears only when **Yes** is selected from **Return to work**.
7. **Optional:** If necessary, attach an image related to the employee's question using the add attachments icon ( ).
8. Select **Save**.

Result

- Based on the selected category, a safety case is created in the Open state.
- If it's a return to work case, **Leaves** and **Injury and illness** tabs appear in this case.

What to do next

As a safety case manager, you can assign the case to yourself and start working on it. You can also assign it to another safety agent. For more information, see Work on a Health and Safety case.

Work on a Health and Safety case

Work on a safety case to provide information, ensure that any outstanding tasks are completed, and resolve the employee's questions and compensation claims related to health and safety.

Before you begin

Role required: sn_hs_cm.case_manager, sn_hs_cm.case_writer, sn_hs_cm.rtw_writer, or sn_hs_cm.claim_case_writer

About this task

When an employee or a worker submits a health and safety question or compensation claim, a safety case is created and assigned to the safety team.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the cases icon ( ).
3. In the **Lists** tab, under the **Cases**, open the case list.
   - For your assigned cases, select **Assigned to me**.
   - For all safety cases, select **All**.
4. In the list, select the case to work on.
   To work on a case that is not assigned to you yet, assign it to yourself using the **Assigned to** field on the safety case form.
5. On the form, fill in the fields.
   For information about safety case form fields, see Health and Safety case form.
6. If the case is set as **Return to Work**, assess the employee's capability to work before they return from their injury or illness.

   Only a user with the Return to work case writer [sn_hs_cm.rtw_writer] role can edit fields in this section.

   a. In the **Return to work details** section, fill in the fields.

   b. In the **Leaves** tab, select **New** to fill in the employee's leave details.

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c. In the **Injury and Illness** tab, review any injuries and illnesses associated with this case. The injury record is auto-populated in the **Injury and Illness** tab if:
   - this case is added to the **RTW case record** field in the injury and illness report of the associated safety incident. For more information, see Injury and illness fields.
   - or, this case was created from the associated injury and illness record. For more information, see Create a return to work case from an injury or illness.

7. If the case is set as **Compensation claim case**, fill in these sections.
   Only a user with the Claim case writer [sn_hs_cm.claim_case_writer] role can access these sections.
   a. In the **Employee claim details** section, review the claim and provide details, including a breakdown of the claim amount into different components that add up to the total claim cost.
   b. In the **Closure details** section, fill in the compensation outcome details, amount paid, and closure date.
8. In the **Documents** tab, add any documents related to the case.
   - Select **Add** to link an existing document stored in the **Health and Safety document library** list.
   - Select **New** to upload a new document.

   For more information, see Add a new Health and Safety related document.
9. In the **Actions** tab, select **New** to add any actions for the case.
   For field descriptions, see Health and Safety action form.
10. Provide additional information requested in this case.
    You can use these sections to provide the information and resolve the case:
    - **Attachments** section to attach any information.
    - **Compose** section to add information in the form of free text. You can also use this section to add links to related knowledge base articles.
11. **Optional:** Research content related to the case by selecting the Agent assist icon ( ).
    Agent assist searches the knowledge base using the text from the case's **Short description** field and shows relevant articles.
12. **Optional:** Generate a report for the safety case, if needed.
    a. Select **Generate report**.

    Note: The **Generate report** button appears only when the Health and Safety case [sn_hs_cm_case] table is enabled for report field mapping. For more information, see Enable a Health and Safety table for configuring report field mapping.

    b. In the **Generate report** dialog box, select a report mapping in the **Select report** field.
    Only the report mapping forms created and published for the Health and Safety case [sn_hs_cm_case] table are available to select in the **Select report** field. For more information, see Create a safety report field mapping for generating reports.

    c. Select **Generate**.
13. Select **Close case** to close the safety case after all activities are complete.

Result
The safety case moves to the Closed Complete state.

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Universal Request for Health and Safety cases

With the integration of Health and Safety Case Management and Universal Request applications, you can provide a consistent user experience for employees while creating service requests.

Universal Request for Health and Safety Case Management Workflow

A universal request gets created when an employee selects the **Request help** option in the Employee Center. On the **Request help** form, when the employee selects the **Issue contains sensitive or confidential information** check box, a drop-down menu to **Select the department for your issue** appears. When the employee selects **Health and Safety** and then selects **Submit**, the system automatically creates a Universal Request with Health and Safety case as a primary ticket.

All the important details, such as, users who are working on the issue, inter-department transfers, and work notes, are recorded in the universal request ticket. This provides complete visibility to the employee who has raised the request.

Universal Request for Health and Safety Case Management overview

- The **Health and safety routing group** contains agents with roles required to manage the universal requests with Health and Safety cases on the Health and Safety Workspace. Organizations can add users to this group for them to access the Health and Safety Workspace and also the Universal Request in the Health and Safety Workspace.
- The Health and Safety cases that are associated with Universal Request appear under **All** > **Health and Safety** > **Health and Safety Cases** > **All** and all the Universal Requests appear under the **Universal Request** > **All** list.
- The detail tab of the **Universal Request** record displays the **Primary ticket** field where you can preview the Health and Safety case that is associated with the universal request record.
- The agent who has the case assigned to them, can view the **Transfer** button on the Health and Safety case record associated with the Universal Request. The agent can use the **Transfer** option to close current Health and Safety case record and move the Universal Request to another department or service.
- The agent who is part of the **Health and safety routing group** can use the **Create Health and Safety Cases** option on the universal request record accessed from the Health and Safety Workspace to create a health and safety case. The new health and safety case will automatically be associated with the universal request and it also becomes the primary ticket for the universal request.
- The safety requests that are created and are associated with Universal Request initiated by the current user on the Employee Center, appear under **Employee Center** > **My Requests**.

Installing the necessary plugins

The Universal Request (com.snc.universal_request) plugin must be installed along with Health and Safety Case Management (sn_hs_cm) for this feature to operate seamlessly.

Create Universal Request for Health and Safety cases as an employee

You can submit a Universal Request for Health and Safety cases from the Employee Center using the **Request Help** form.

Before you begin
Role required: none

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Search for `help` and select the **Request Help** card.
3. On the **Request Help** form, fill in the details.

Request Help form

Field	Description
How do you summarize your issue	Summary of the issue
Anything else we should know	More information about the issue
Issue contains sensitive or confidential information	Check box to tag the issue as confidential
Select department for your issue	Name of the department the issue is related to This field appears when the **Issue contains sensitive or confidential information** field is selected
Add attachments	Option to attach documents if any

4. In the **Select department for your issue** field, select **Health and Safety**.
5. Select **Submit**.

Result

- The request is transferred to the Health and Safety department.
- The universal request number from which the health and safety case is created appears in the **Universal Request** field on the health and safety case form.
- The health and safety case number appears in the **Primary Ticket** field on the universal request form. It also appears under the **Associated Tickets** related item.

Create Universal Request for Health and Safety as an agent

Agents can create and manage universal requests directly from the Health and Safety Workspace.

Before you begin

Role required: sn_uni_req.routing_agent or admin

About this task

Agents that are part of the Health and Safety routing group can initiate and manage universal requests within the Health and Safety Workspace.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the primary navigation, select **Cases** icon ( )
3. Select **Universal Requests** and then select **All**.
4. Select **New** to open the universal request form.

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On the Universal Request form, fill in the details. For more information see, Universal Request form

5. Select **Submit**.

Result
The Universal Request record is created and appears in the Universal Request list tab.

What to do next
The agent can perform the following from the new Universal Request record:

- Select the **Assign to me** button to assign the Universal Request to self. The **Assigned to** field of the Universal Request gets updated with the agents name.
- Select the **Restrict** button to mark a Universal Request as restricted when you identify that the request contains sensitive information. This option can be selected on the universal record or the Health and Safety record to mark the health and safety case (primary ticket) as restricted.

  For detailed information on Universal Request security capabilities, see Universal Request sensitive information security.

- Use the More actions ••• icon and select **Create Health and Safety Case**.

Manage a Universal Request from the Health and Safety Workspace

You can perform various actions on the Universal Request and the case associated with Universal Request from the Health and Safety Workspace.

If you're part of the Health and Safety routing group, you can do the following:

- Assign a Health and Safety case linked to a Universal Request
- Transfer a Universal Request from the Health and Safety Workspace
- Create associated tickets for Universal record within Health and Safety Workspace

Assign a Health and Safety case linked to a Universal Request

Assign the Health and Safety case that is associated with the Universal Request to an agent. If the assignment group is selected then an agent in that group can be selected.

Before you begin
Role required: admin or sn_uni_req.routing_agent

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspaces**.
2. Select the cases icon ( ) to open the **Cases** tab.
3. In the lists tab, select **Universal Request** and then select **All**.
4. Select the universal request record that has the safety case to be transferred.
5. In the **Primary Ticket** field, select the information ( ) icon to open the health and safety case.
6. In the **Assigned to** field of the safety case, select an agents name.
7. Select **Save.**

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Result
The case gets assigned to the new agent and the options to **Close case**, **Transfer**, **Unrestrict**, and **Create Associated Ticket** appear on the Health and Safety case record associated with the Universal Request, provided the current user is the assigned agent.

What to do next
The agent can either resolve or close the primary case or transfer it to another department or agent from the Health and Safety Workspace.

Transfer a Universal Request from the Health and Safety Workspace

You can transfer a Universal Request to another department or services from the Health and Safety Workspace.

Before you begin
Role required: sn_uni_req.routing_agent

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the cases icon ( ) to open the **Cases** tab.
3. In the lists tab, select **Universal Request** and then select **All**.
4. Select the universal request record that has the safety case to be transferred.
5. In the **Primary Ticket** field, select the information ( ) icon to open the health and safety case.
6. Select the **Transfer** button.

   Note: The **Transfer** option is displayed only if the case is assigned to you.

7. On the **Transfer Ticket** form, provide the following details:

Transfer Ticket form

Field	Description
Department	The different departments of the organization
Transfer reason	The reason for transferring the safety case to another department or services
Transfer notes	Brief description for routing the primary ticket

8. Select **Transfer**.

Result
The universal request is transferred to the selected department. Based on the reason of transfer the state of the health and safety case changes from **Work in progress** to **Closed Complete** or **Awaiting acceptance**.

What to do next
To associate another health and safety ticket to the universal request, you can select **Create Associated Ticket**. The new associated ticket displays on the **Associated Tickets** related list of the universal request.

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Create associated tickets for Universal record within Health and Safety Workspace

The agent working on the primary ticket of a Universal Request can request other departments for assistance in resolving a universal request (UR) by creating associated tickets for the UR.

Before you begin

Role required: sn_uni_req.routing_agent or admin

About this task

A routing agent of the primary ticket can request other departments for assistance in resolving a UR by creating associated tickets on the UR. Multiple departments can work simultaneously on the associated tickets to resolve the UR.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the cases icon () to open the **Cases** tab.
3. In the lists tab, select **Universal Request** and then select **All**.
4. Select the universal request record.
5. In the **Primary Ticket** field, select the information () icon to open the health and safety case.
6. Select the **Create Associated Ticket** button.
7. On the **Create Associated Ticket** form, provide the following details:

Create Associated Ticket form

Field	Description
Department	The different departments of the organization
Service	Specific service of the chosen department
Short Description	Short description of the new associated ticket
Description	Detailed description of the new associated ticket

8. Select **Create**.

Result

An associated ticket is created with the descriptions provided and is associated with the existing UR of the primary ticket. The associated ticket can also be viewed in the **Associated Ticket** related item of the Universal Request record.

Health and Safety Case Management reference

Using the reference topics, learn about the components, such as the roles, tables, plugins, and store applications that are installed when you install the Health and Safety Case Management application.

Components installed with Health and Safety Case Management

Several types of components are installed with installation of the Health and Safety Case Management application, including tables, user roles, and scheduled jobs. The application also installs related store applications if they aren't already installed.

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Store applications installed

Store apps installed with Health and Safety Case Management

Store application	Description
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.

Roles installed

Roles in Health and Safety Case Management

Role title [name]	Description	Contains roles

Safety case manager
 	
[sn_hs_cm.case_manager]
	Manager for Health and Safety cases who can
	• View Health and Safety cases and their related records in the Health and Safety Workspace
	• Create, update, and delete these from the Health and Safety Workspace
	  ○ Health and Safety cases
	  ○ Return to work cases
		• sn_hs_cm.case_reporter
		• sn_hs_cm.rtw_writer
		• sn_hs_cm.case_writer

Safety case reporter [sn_hs_cm.case_reporter]	• View cases created for the Health and Safety questions asked • Submit Health and Safety questions from the Employee Center	none
Safety case reader [sn_hs_cm.case_reader]	• Can view Health and Safety cases in the Health and Safety Workspace	• sn_ohs_im.incident_reader • sn_ohs_im.observation_reader • sn_ohs_im.hs_profile_reader

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Roles in Health and Safety Case Management (continued)

Role title [name]	Description	Contains roles
	• Can view safety incidents and observations associated with Health and Safety cases	• sn_ohs_im.document_reader • sn_ohs_im.action_reader
Safety case writer [sn_hs_cm.case_writer]	• Create and update Health and Safety cases in the Health and Safety Workspace • Can associate related safety incidents and observations to Health and Safety cases	• sn_ohs_im.incident_writer • sn_ohs_im.observation_writer • sn_hs_cm.case_reader • sn_ohs_im.document_writer • sn_ohs_im.action_writer
Return to work case reader [sn_hs_cm.rtw_reader]	Can view Return to work cases in the Health and Safety Workspace	sn_ohs_im.hs_profile_reader
Return to work case writer [sn_hs_cm.rtw_writer]	Safety case writer who can create and update Return to work cases in the Health and Safety Workspace	• sn_hs_cm.case_writer • sn_hs_cm.rtw_reader
Claim case writer [sn_hs_cm.claim_case_writer]	Safety case writer who can create, update, and delete claim cases in the Health and Safety Workspace	• sn_hs_cm.case_writer • sn_hs_cm.claim_case_reader
Claim case reader [sn_hs_cm.claim_case_reader]	Can view Health and Safety claim cases in the Health and Safety Workspace	sn_hs_cm.case_reader

Tables installed

Tables in Health and Safety Case Management

Table	Description
Health and Safety case [sn_hs_cm_case]	Stores all records of Health and Safety cases. This table extends the Health and Safety task [sn_ohs_im_task] table.
Leave [sn_hs_cm_leave]	Stores Health and Safety cases of type Injury and illness related leave.

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Tables in Health and Safety Case Management (continued)

Table	Description
Health and Safety Case Payment [sn_hs_cm_payment]	Stores payment details for Health and Safety compensation claim cases.

User groups installed

User groups installed Health and Safety Case Management

Name of group	Description	Contains roles
Health and Safety routing group	Assignment group for Universal Request for Health and Safety cases.	• agent_workspace_user • workspace_user • sn_ohs_im.workspace_user • sn_uni_req.routing_agent • sn_hs_cm.case_manager

Health and Safety case form

Safety case manager can use the safety case form to resolve health and safety questions that they receive from employees.

When a health and safety question is submitted, it creates a safety case. Some of the fields on the case form are populated from the request from which it is created.

After the case is assigned, a safety agent fills out the fields on the case from Health and Safety Workspace.

Health and Safety case form

Field	Description
Number	System-generated unique number for the case.
Short description	Brief description of the request.
Requested for	Person for whom the information is requested.
Category	Type of the case or employee's question. • **Health and safety procedures**: Queries related to the organization's health and safety procedures. • **Training**: Queries related to health and safety training. • **Equipment**: Queries related to health and safety equipment.

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Health and Safety case form (continued)

Field	Description
	• **Injury / Incident related leave**: Queries related to leaves due to injuries or incidents and the related return to work considerations. • **General inquiry**: Any other general health and safety queries.
Related incidents / observations	Safety incident or observation this case is related to. This field appears only when the Health and Safety Incident Management (sn_hs_im_incident) application is installed on your ServiceNow instance. For more information, see Install Health and Safety Incident Management.
Return to work case	Option whether this case is related to an employee returning to work after an injury or illness. Only a user with the Return to work case writer [sn_hs_cm.rtw_writer] role can edit this field. A Return to work case is usually opened related to an incident where an employee was injured and required time off to recover. The following items appear when **Yes** is selected in this field: • **Return to work details** section on the case form. • **Leaves** and **Injury and illness** tabs for this case.
Compensation claim case	Option whether this case is related to a to compensation claim. The following sections appear when **Yes** is selected in this field. Only a user with the Claim case writer [sn_hs_cm.claim_case_writer] role can edit fields in these sections. • Employee claim details • Closure details
Parent case	Parent Health and Safety case ID number this case is related to.
State	State of the case.

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Health and Safety case form (continued)

Field	Description
Assignment group	Safety assignment group the case is assigned to. If the case isn't assigned to a user yet, any member of this group can work on the case.
Assigned to	User assigned to this case.
Contact type	Method to contact the person this information is requested for, such as email or phone number.
Description	Detailed description of the case.

Return to work details

The **Return to work details** section on the Health and Safety case form appears only when **Yes** is selected from **Return to work case**. The fields enable you to assess the employee's capability to work before they return from an injury or illness.

Only a user with the Return to work case writer [sn_hs_cm.rtw_writer] role can edit fields in this section.

Return to work details fields

Field	Description
Leave category	Reason the employee was away from work.
Expected return date	Date the employee is expected to return to work.
Medical clearance received	Option to indicate whether a medical clearance is received for the employee before they return to work from an injury or illness returning.
Accommodations needed	Changes required to help the employee return to work.
Work restrictions	Limitations identified during the return to work planning for the employee.

Domain separation and Health and Safety Case Management

Domain separation is supported for Health and Safety Case Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

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- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Domain-separated tables overview

All tables in the Health and Safety Case Management can be domain-separated and include the required domain separation field.

How domain separation works in Health and Safety Case Management

- Each table in Health and Safety Case Management includes the domain separation fields **Domain** and **Domain path**.
- Customers can use these fields to configure domain separation in their implementation of Health and Safety Case Management.

Related topics

Domain separation for service providers

Health and Safety Contractor Management

The ServiceNow® Health and Safety Contractor Management application enables you to manage contractor companies and workers for their health and safety. With this application, you can confirm that contract workers have relevant certificates and skills and have completed the required trainings before they arrive at the site so that they can perform their job safely.

Get started

Explore	Configure
	
Learn how workers, line managers, and safety contractor coordinators use Health and Safety Contractor Management.	Set up Health and Safety Contractor Management.

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Use



Prequalify contractor companies and manage contract workers for health and safety.

Reference



Get details about components such as roles, tables, and store applications that are installed.

Troubleshoot and get help

- Ask questions and explore other resources for Health and Safety Contractor Management in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Health and Safety Contractor Management

Learn more about Health and Safety Contractor Management and review the benefits it can provide for different users in your organization.

Health and Safety Contractor Management overview

With this application, you can confirm that contractor workers have relevant certificates and skills and have completed the required trainings before they arrive at the site so that they can perform their job safely.

Health and Safety Contractor Management users

Users

User	Description
Safety contractor coordinator	Manage contractor workers from the Health and Safety Workspace for their health and safety and know who is on site at all times. The contractor coordinator confirms that contractor workers have relevant certificates and skills and have completed the required trainings before granting them access to the site.
Employee and Line manager	Add contractor companies from the Employee Center to initiate their health and safety pre-qualification process.
Contractor worker	Complete assigned tasks and upload documents as mentioned in the email notification.

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Health and Safety Contractor Management workflow

1. Safety contractor coordinator keeps track of all contractor companies' details in the Health and Safety Workspace. They also list all the contractor workers including their areas of expertise and contact details.
2. Safety contractor coordinator assigns tasks to the contractor workers to ensure that they're up to date on prerequisite training and document uploads before they come on site.
3. Contractor workers receive an email for the assigned tasks and mark them complete.
4. When the prerequisite tasks have been completed by the contractor workers, the contractor coordinator grants them access for the site.

Health and Safety Contractor Management benefits

Key features of Health and Safety Contractor Management and their benefits

Benefit	Feature	Users
Prequalify contractor companies and their workers to keep track of their health and safety.	Add contractor company and worker	• Safety contractor coordinator • Line manager
Ensure prerequisite training and document uploads for contractor workers before they come on site.	Task assignment for contractors	Safety contractor coordinator
Gather prerequisite documents form the contractor company and its workers.	Contractor documents	Safety contractor coordinator
Track all contractor workers and know who is on site at all times.	Site access	Safety contractor coordinator
Add contractor worker on incident and observation.	People involved in a safety incident	• Line manager • Safety agent

What to explore next

To learn more about configuring and using Health and Safety Contractor Management, see:

- Configuring Health and Safety Contractor Management
- Managing contractors for health and safety
- Health and Safety Contractor Management reference

Configuring Health and Safety Contractor Management

Set up your implementation for Health and Safety Contractor Management by installing the application and reviewing and configuring the components that are installed with the application.

Configuration overview

- Install Health and Safety Contractor Management

  Install the Health and Safety Contractor Management application (sn_hs_crm) if you have the admin role.

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- Assign [snc_external] role to contractor workers

  For more information on this role, see Explicit Roles.

- Assign Health and Safety profile to contractor workers

  Assign the Health and Safety profile to all contractor workers who need to complete assigned tasks to work at your site.

Install Health and Safety Contractor Management

You can install the Health and Safety Contractor Management application (sn_hs_crm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Contractor Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Health and Safety Contractor Management:

- Plugins
- Store applications
- Roles
- Tables

For more information, see Components installed with Health and Safety Contractor Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Contractor Management application (sn_hs_crm) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Assign Health and Safety profile to a contractor worker

Assign the Health and Safety profile to all contractor workers who need to complete assigned tasks to work at your site.

Before you begin

Confirm that the snc_external role is assigned to the contractor worker. For more information on this explicit role, see Explicit Roles.

Role required: sn_hs_crm.contractor_coordinator

About this task

Note: The **Generate Health And Safety Profiles** scheduled job runs weekly and automatically creates health and safety user profiles for users [sys_user] with an assigned role in any of the Health and Safety applications.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the configuration icon ( ).
3. In the **Lists** tab, select **Health and safety profiles** and then **All**.
4. Select **New** to add a contractor worker for health and safety.
5. On the form, fill in the fields.
   For information on form field descriptions, see Health and Safety profile form.
6. Select **Save**.

Result

- The contractor worker is listed in the **Health and safety profile** list under **Configuration** on the Health and Safety Workspace. The user profile is saved in the Health and Safety profile [sn_ohs_im_health_and_safety_profile] table.
- The user is available for selection on these forms:
  - Contractor company when registering a contractor company for health and safety. For more information, see Add a contractor company from Health and Safety Workspace.
  - Worker form when adding a contract worker to a contractor company.
  - Site access form when granting site access to a contract worker. For more information, see Grant site access to a contractor worker.

Managing contractors for health and safety

Using Health and Safety Contractor Management, contract coordinators can manage contractors for health and safety and know who is on site at all times.

Overview of Health and Safety Contractor Management workflow

Health and Safety Workspace

In the workspace, the safety contractor coordinator performs the following tasks:

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1. Add a contractor company from Health and Safety Workspace

   Keep track of all contractor companies' details including their name, address, their primary contact, and overall rating. Additionally, list all the contractor workers including their areas of expertise and contact details.

   Employees or Line managers can also register contractor companies from the Employee Center to initiate their health and safety pre-qualification process. For more information, see Register a contractor company through Employee Center.

2. Assign a task to a contractor worker

   Assign tasks to the contractor workers to confirm that they're up to date on prerequisite training and document uploads before they come on site.

3. Add a document to a contractor worker

   Upload any documents collected from contractor workers or related to contractor worker in the workspace.

4. Grant site access to a contractor worker

   Once completed tasks are received by the contractor coordinator, workers can be granted access to the customer's locations.

Contractor tasks via email

Contractor workers complete assigned tasks as received in the email notification.

1. Contract worker receives an email for assigned tasks. They can respond to the actions directly from the buttons in the email.
   - Upload documents
   - View prerequisite training material
   - Mark tasks as complete
2. When prerequisite tasks have been completed, the contractor coordinator grants them access to the site. Contract worker receives another email with an access code that can be used to access the company locations.

Register a contractor company through Employee Center

Register a contractor company to initiate its health and safety pre-qualification process with safety contractor coordinators in your organization.

Before you begin

Role required: sn_hs_crm.reporter

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, under the **Health and Safety** menu, select **Contractor management** and then select **Register a contractor company**.
3. On the form, fill in the fields.

   a. Enter the company name and select an appropriate industry type for the company.

   b. Add a primary contact from the contractor company.

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This field displays only users who have been assigned the [snc_external] role and have a Health and Safety profile created for them.

For more information, see Assign Health and Safety profile to a contractor worker.

4. Select **Submit**.

Result

- The contractor company is registered for health and safety.
- The contractor company is listed in the Contractor companies list on Health and Safety Workspace. A safety contractor coordinator [sn_hs_crm.contractor_coordinator] can view all the registered companies by navigating to the Health and Safety Workspace and selecting the contractor management icon ().

What to do next

A safety contractor coordinator can complete the pre-qualification information for this company from Health and Safety Workspace. For more information, see Add a contractor company from Health and Safety Workspace.

Add a contractor company from Health and Safety Workspace

Add a contractor company to prequalify it and its workers. You can then manage the contractor workers from this company for their health and safety.

Before you begin

Role required: sn_hs_crm.contractor_coordinator

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the contractor management icon () to open the **Contractor Management** tab.
3. In the **Lists** tab, select **Contractor companies** and then **All**.
4. Select **New** to add a contractor company for health and safety.
5. On the form, fill in the fields.

   a. Enter company details such as Company name, Services provided, Industry type, address, and its star rating.

   b. Add a primary contact from the contractor company in the **Primary contact** field.

      The **Primary contact** field displays only users who have been assigned the [snc_external] role and have the Health and Safety profile created for them.

      For more information, see Assign Health and Safety profile to a contractor worker.

6. **Optional:** If necessary, add attachments related to the company using the add attachments icon ().
7. Select **Save**.

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Result

- The contractor company is added for health and safety. The record for this company is stored in the Contractor company [sn_hs_crm_company] table.
- Workers, Documents, and Site access tabs appear for this contractor company.

What to do next

- In the **Workers** tab, select **Add** to add contract workers from this company who will perform required tasks at your site. Add all the contractor workers including their areas of expertise and contact details.

  Note: Only users who have been assigned the [snc_external] role and have the Health and Safety profile created for them appear in the list and can be added as contract workers.

- In the **Documents** tab, add any documents collected from the contractor company or its workers.
  - Select **Add** to link an existing document stored in the **Health and Safety document library** list.
  - Select **New** to upload a new document.

  For information on storing safety-related documents in Health and Safety Workspace, see Add a new Health and Safety related document.

- In the **Site access** tab, select **New** to grant site access to workers from this contractor company so that they can perform required tasks at your location.

  If any workers associated with this company already have the site access, they appear in this list. For information on adding site access for a worker, see Grant site access to a contractor worker.

Assign a task to a contractor worker

Assign tasks to the contractor workers to ensure that they're up to date on prerequisite training and document uploads before they come on site.

Before you begin

Role required: sn_hs_crm.contractor_coordinator

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Open a contractor worker record to assign a task.

Option	Steps
From a contractor company record	**a.** Select the contractor management icon ( ) to open the **Contractor Management** tab. **b.** In the **Lists** tab, select **Contractor compa nies** and then **All**.

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Option	Steps
	c. Open the company that the worker belongs to. **d.** In the **Workers** tab, select the worker from the list to assign a task to.
From Health and Safety user profile list	**a.** Select the configuration icon (). **b.** In the **Lists** tab, select **Health and safety profiles** and then **All**. **c.** From the list, select the worker from the list to assign a task to.

3. In the **Actions** tab, select **New**.
4. On the form, fill in the fields.
   For information on field descriptions, see Health and Safety action form.
5. Select **Save**.

Result

- The contractor worker receives an email about the assigned task.
- The task is listed in the **Actions** tab of the contractor worker record.

What to do next

- The contract worker responds to the tasks and completes them directly from these buttons in the email:
  - Upload documents
  - View prerequisite training material
  - Mark the task as complete
- When the contract worker completes all prerequisite tasks, the contractor coordinator can grant them access to the site. For more information, see Grant site access to a contractor worker.
- If there are any documents submitted by the contractor worker, the contractor coordinator can upload them to the worker's or contractor company's **Document** tab. For more information, see Add a document to a contractor worker.

Add a document to a contractor worker

Add any documents collected from a contractor worker or related to this contractor worker.

Before you begin

Role required: sn_hs_crm.contractor_coordinator or sn_ohs_im.document_writer

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Open a contractor worker record to add the document to.

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Option	Steps
From a contractor company record	**a.** Select the contractor management icon () to open the **Contractor Management** tab. **b.** In the **Lists** tab, select **Contractor companies** and then **All**. **c.** Open the company that the worker belongs to. **d.** In the **Workers** tab, select the worker from the list to add the document to.
From Health and Safety user profile list	**a.** Select the configuration icon (). **b.** In the **Lists** tab, select **Health and safety profiles** and then **All**. **c.** From the list, select the worker from the list to add the document to.

3. In the **Documents** tab, select **New**.
4. On the form, fill in the fields.
   For information on form field descriptions, see Health and Safety document version form.
5. Select **Save**.

Result

- The document is listed in the **Documents** tab of the contractor worker record.
- The document is also listed in the **Health and Safety document library** list under **Configuration** and is saved in the Health and Safety document [sn_ohs_im_document_v2] table.

Grant site access to a contractor worker

When the contractor worker has completed all prerequisite tasks, you can grant them access to the site to perform required tasks.

Before you begin

Role required: sn_hs_crm.contractor_coordinator

About this task

Adding site access for workers also helps the safety team to know who's checked in and out of the site at any given point in time.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Open a contractor worker record to grant the site access to.

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Option	Steps
From a contractor company record	**a.** Select the contractor management icon () to open the **Contractor Management** tab. **b.** In the **Lists** tab, select **Contractor companies** and then **All**. **c.** Open the company that the worker belongs to. **d.** In the **Workers** tab, select the worker from the list to grant the site access to.
From Health and Safety user profile list	**a.** Select the configuration icon (). **b.** In the **Lists** tab, select **Health and safety profiles** and then **All**. **c.** From the list, select the worker from the list to grant the site access to.

3. In the **Site access** tab, select **New**.

   Tip: You can also add site access for workers from the **Site access** tab in the contractor company record.

4. On the form, fill in the fields.

   Site access form

Field	Description
State	State of the site access. Set it to **Active** to grant the site access.
Worker	Name of the contractor worker. When you create this site access record from a contractor worker record, this field is auto-populated with the worker's name.
Location	Location of the site this access applies to.
Start date	Date when the worker's can first access the site.
End date	Date when the worker's site access ends.

5. Select **Save**.

Result

- The access is listed in the **Site access** tab of the contractor worker record.
- The access is also listed in the **Site access** tab of the contractor company that this worker belongs to.

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Add a contractor from the Health and Safety Workspace

Onboard a contractor to a company listed in the Health and Safety Workspace workspace.

About this task

A new contractor can be added to an existing contractor company in the company list that can be viewed in the Health and Safety Workspace.

For more information about adding a contractor company, see Add a contractor company from Health and Safety Workspace

Before you begin

Role required: sn_hs_crm.contractor_coordinator

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Add a contractor.

Option	Steps
From a contractor company record	**a.** Select the contractor management icon () to open the **Contractor Management** tab. **b.** In the **Lists** tab, select **Contractor compa nies** and then select **Active**. **c.** Open the company that you want the con tractor added to. **d.** In the **Workers** tab, select **Add**. **Note:** A list of all users with the [snc_ external] role is displayed. Selecting a user from this list creates a Health and Safety profile for them and add them to the contractor company. **e.** Select the check box for one or more con tractors to add to the contractor company and select **Add**.
From Health and Safety user profile list	**a.** Select the configuration icon (). **b.** In the **Lists** tab, select **Health and safety profiles** and then **Active** and then select **New**.

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Option	Steps
	c. On the form, fill in the fields and select **Save** to add the contractor in the workers list. **Note:** ▪ The **Type** field must be set to con tractor. Only the users with [snc_ex ternal] role appear in the **User** list. When the form is saved, the role [sn_hs_csc.contractor] is assigned to the contractor. This role is need ed to access the Contractor Service Center. ▪ Select the company in the **Compa ny** field for the contractor to appear in the company's worker tab. **Note:** If the company isn't selected, the Health and Safe ty profile for the contractor is still created with the correct roles to access to the Contrac tor Service Center, but the con tractor doesn't appear under any contractor company.

Result

- The contractor is added to the workers tab of the contractor company with the correct roles.
- An email is sent to the contractor with the log in user name and password and a link to access the Contractor Service Center.

What to do next

You can assign a task to the contractor or upload any documents obtained from the contractor to complete the onboarding for the contractor.

- For more information to assign a task to a contractor, see Assign a task to a contractor worker.
- For more information to add a document for a contractor, see Add a document to a contractor worker.
- To configure the Health and Safety profile for a contractor, see Assign Health and Safety profile to a contractor worker.

Health and Safety Contractor Management reference

Using the reference topics, learn about the components, such as the roles, tables, plugins, and store applications that are installed when you install the Health and Safety Contractor Management application.

Components installed with Health and Safety Contractor Management

Several types of components are installed with installation of the Health and Safety Contractor Management application, including tables, user roles, and scheduled jobs. The application also installs related store applications if they aren't already installed.

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Store applications installed

Store apps installed with Health and Safety Contractor Management

Store application	Description
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.
Workplace Core [sn_wsd_core]	Enables workplace locations for Health and Safety applications. **Important:** The application installation doesn't install the location demo data for the Workplace Core location model. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.

Roles installed

Roles in Health and Safety Contractor Management

Role title [name]	Description	Contains roles

Safety contractor coordinator
 	
[sn_hs_crm.contractor_coordinator]
	Coordinator for contractor companies and workers who can
	• View contractor companies and their related records in Health and Safety Workspace
	• Add, update, and delete these from Health and Safety Workspace
	  ○ Contractor companies for health and safety
	  ○ Contractor workers for health and safety profiles
		• sn_ohs_im.hs_profile_writer
		• sn_ohs_im.workspace_user
		• sn_hs_crm.reporter
		• sn_ohs_im.document_admin
		• canvas_user
		• sn_ohs_im.action_writer
		• sn_ohs_im.action_reader

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Roles in Health and Safety Contractor Management (continued)

Role title [name]	Description	Contains roles
	• Assign safety related tasks and actions to contractor workers • Collect safety related documents from contractor companies and workers • Grant site access to contractor workers	
Safety contractor reporter [sn_hs_crm.reporter]	View and create contractor companies for health and safety from Employee Center	• sn_ohs_im.hs_profile_reader • sn_hs_crm.company_writer • sn_hs_crm.company_reader
Safety contractor company writer [sn_hs_crm.company_writer]	Can write information into the contractor management company table and tables related to it	None
Safety contractor company reader [sn_hs_crm.company_reader]	Can view information from the contractor management company table and tables related to it	None

Tables installed

Tables in Health and Safety Contractor Management

Table	Description
Contractor company [sn_hs_crm_company]	Stores all contractor companies added for Health and Safety.
Site access [sn_hs_crm_location_access]	Stores all contractor workers who've been granted site access.
Document [sn_hs_crm_m2m_company_document]	Stores all safety related documents collected from contractor companies and workers.

Domain separation and Health and Safety Contractor Management

Domain separation is supported for Health and Safety Contractor Management. Domain separation enables you to separate data, processes, and administrative tasks into logical

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groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Domain-separated tables overview

All tables in the Health and Safety Contractor Management can be domain-separated and include the required domain separation field.

How domain separation works in Health and Safety Contractor Management

- Each table in Health and Safety Contractor Management includes the domain separation fields **Domain** and **Domain path**.
- Customers can use these fields to configure domain separation in their implementation of Health and Safety Contractor Management.

Related topics

Domain separation for service providers

Contractor Service Center

The ServiceNow® Contractor Service Center enables the contract workers to self-service when coming on site to provide documentation, perform tasks, and report any health and safety issues or concerns when on site.

Get started

Explore	Configure
Learn how contract workers use the Contractor service center.	Set up Contractor Service Center

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Use



Complete pre-qualification tasks, raise safety requests and upload documents for health and safety.

Reference



Get details about components such as roles, tables, and store applications that are installed.

Helpful resources

- Ask questions and explore other resources for Contractor Service Center in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Contractor Service Center

The Contractor Service Center is a centralized hub to manage and support contractors. It helps streamline contractor workflow, improve efficiency, and provide secure and high-quality functioning of various safety tasks.

Contractor Service Center overview

This application is a self-service center where contractors can complete any tasks that are assigned to them by the safety contractor coordinator. They can perform various safety tasks such as report a Health and Safety incident, request permit to work, upload documents, and create JSAs. They have easy access to site safety tools, protocols, and documentations.

Contractor Service Center users

Users

User	Description
Contractor	Uses the contractor service center to complete pre-qualification tasks or submit documents.

Contractor Service Center workflow

The contractor begins by using the link provided in the onboarding email to access the Contractor Service Center. Using the username and password included in the same email, the contractor logs into the system. Upon first login, the contractor is prompted to update their password for security purposes. Once logged in, the contractor can view and complete all tasks assigned by the safety contractor coordinator, including uploading any required documents. Additionally, the contractor can use the self-service features within the Contractor Service Center to create and submit driving requests as needed.

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Contractor Service Center benefits

Contractor Service Center Benefits

Benefits	Feature	Users
Use the self-service access at the Contractor Service Center to perform various tasks such as creating Health and Safety requests, permit to work requests, and JSAs.	Contractor Service Center navigation overview	Contractor
Log in to the Contractor Service Center using the email.	Log in to the Contractor Service Center for the first time as a contractor	Contractor
Add or create the contractor profile on the Health and Safety Contractor Management workspace.	Add a contractor from the Health and Safety Workspace	Safety contractor coordinator

What to explore next

To learn more about configuring and using the Contractor Service Center, see:

- Configuring Contractor Service Center
- Using the Contractor Service Center
- Contractor Service Center reference

Contractor Service Center navigation overview

The widgets and quick links available on the contractor service center web interface provides a self-service access to the contractor to complete all tasks safely.

Contractor Service Center improves contractor productivity by reducing the time and effort contractors spend looking for services, updates, and information. The Contractor Service Center is a hub that helps organizations to assemble a contractor portal tailored to their needs.

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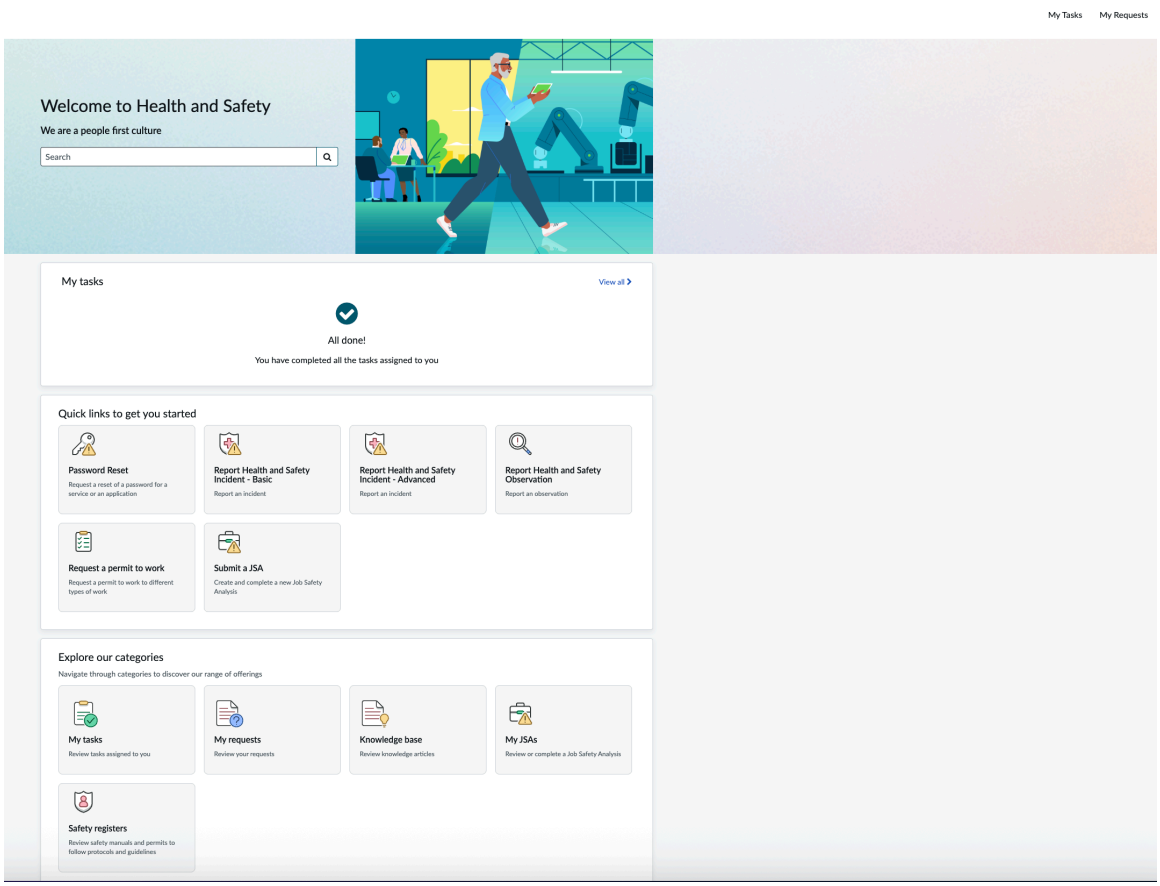

The contractors gain self-service access on the portal to the following:

- **My Tasks** section populates all the tasks assigned to the contractor by the company or by the safety contractor coordinator. Use this section to complete pre-qualification tasks and upload requested documents. Selecting **My Tasks** tab, opens a form. The form shows the Open and Completed tabs. The **Open** tab lists all to-dos that haven't been completed. The **Completed** tab lists all tasks that have been completed. The currently completed tasks appear at the top of the list and sorted by timestamp. For example, when a documentation upload task is assigned to the contractor, it's available in the **Open** tab of **My Tasks** option. When selected, the details appear with an option to add attachments. Once all the requested attachments are added, the contractor can select **Mark complete** or **Mark in progress** to obtain further documents.
- **My Requests** tab lets you view all the requests you have raised. For example, you can track a permit-to-work request here. Your requests display with the current request first in the list. When you select a request under the **Open** tab, you can view the details of the request raised.
- **Knowledge base** widget enables access to the investigation plans, safety statements, Health and Safety contacts list, and Health and Safety submission guidelines.
- **Safety registers** widget provides access to view and download Safety Data Sheet for chemicals, asbestos, and other hazardous materials. For more information, see Access a safety register document in Employee center.
- **Password reset** widget enables you to change you password. The password reset communication takes place through the registered email of the contractor.
- **Report Health and Safety incident** widget enables you to raise a safety incident. For more information, see Submit a safety incident as an employee
- **Report Health and Safety observation** widget enables you to raise a safety observation. For more information, see Submit a safety observation as an employee

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- **Request a permit to work** widget enables you to request a permit to work. For more information, see Create a permit-to-work request
- **Submit a JSA** widget enables you to create a JSA. For more information, see Submit a JSA from Employee Center

Configuring Contractor Service Center

Set up your implementation for Contractor Service Center by installing the plugins and reviewing and configuring the components installed with it.

Install Contractor Service Center

You can install the Health and safety Contractor safety center [sn_hs_csc] application if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application .
- Review the Contractor Service Center application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Contractor Service Center application:

- Plugins
- Store applications
- Roles
- Tables

For more information, see Components installed with Contractor Service Center.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Contractor Service Center application (sn_hs_csc) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure system properties for Save as draft option

Configure the system properties to enable the **Save as draft** option for some catalog item. For example, on the permit to work form or for password reset.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** and enter `sys_properties.list` in the navigation filter.
   The System properties [sys_properties] table appears.
2. In the **Name** column, search for `glide.sc.enable.save_as_draft.portal.csc`.
3. Select the **glide.sc.enable.save_as_draft.portal.csc** property.
4. Update the **Value** field to.

Value	Result
True	Enables **Save as draft** option.
False	Disables **Save as draft** option.

5. Select **Update**.

Configure the menu for Contractor Service Center

As an admin you can configure the menu for the contractor service center. You can update the **Quick links to get you started** or the **Explore our categories** menu items, or create a menu item.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Contractor service center** > **Menu configuration**.
2. Select the existing menu titles to edit them or select **New** to add a new menu.
3. To edit the existing menu,

   a. Select an existing menu.

   b. Select an existing menu item to edit it or select **New** to create a menu item.

   c. For a new menu item, fill in the form.
   For form field description, see Contractor service portal menu item form

   d. Select **Update**.

   The menu item appears on the portal.

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Configure the Contractor Service Center portal theme

A theme is a collection of one or more style sheets (CSS files) that define a consistent look for a set of pages. Configure the default portal theme to apply your own theme to suit your branding and improve the visual design of the portal pages.

Before you begin

Role required: admin

About this task

Contractor Service Center application ships a default **CSC theme** that has the best visual design experience. The CSC theme provides a consistent experience across all portal pages.

Procedure

1. Navigate to **All** > **Service Portal** > **Themes**.
2. Search for `CSC Theme` to use the default theme.

   Note:

   - Use the default theme for a better visual and usability experience. However, you can select other themes to suit your needs.
   - Remove the customized portal theme before an upgrade to see any default theme that might be released with a future version of Contractor Service Center.

3. **Optional:** Configure the theme content to suit your requirement.

   a. Navigate to **Service Portal** > **Portals**.

   b. Select **Contractor Service Center** to open the record.

   c. Select **here** on the note to edit the record.

   d. Select the **Preview this record** icon ( ) for the **Theme** field and select **Open record**.

   e. Select **here** on the note to edit the record.

   f. Edit the **CSS variables** field to customize the text and the background colors of your portal.

   - To create a portal theme and for a description of the field values to create a portal theme, see Create a portal theme .
   - To configure a portal header or footer, see Configure a portal header menu

4. Navigate to **All** > **Service Portal** > **Portals** > **Contractor service center** and then select **Try it** to preview.
5. Select **Update**.

Configure Contractor Service Center web page

Edit or configure the Contractor Service Center web interface and use layouts to organize the columns that house the widgets.

For more information to perform the web interface customization, see Create and edit a page using the Service Portal Designer

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Using the Contractor Service Center

A contractor can use the Contractor Service Center to access site safety tools, protocols, documentation, raise health and safety requests, and request permits safely.

On the Contractor Service Center you can:

- Submit a safety incident to report it to the safety department for an investigation. For more information, see Submit a safety incident as an employee.
- Submit a safety observation to report it to the safety department for an investigation. For more information, see Submit a safety observation as an employee.
- Submit a permit-to-work request to carry out the job with significant risk. For more information, see Create a permit-to-work request.
- Submit a job safety analysis (JSA) to identify potential hazards and control measures related to these hazards at your point-of-work. For more information, see Submit a JSA from Employee Center.
- Access and view safety register documents for chemicals and asbestos. For more information, see Access a safety register document in Employee center.

Log in to the Contractor Service Center for the first time as a contractor

You can log in to the Contractor Service Center and create various health and safety requests, or access knowledge articles.

Before you begin

Role required: sn_hs_csc.contractor

Procedure

1. Open the email titled **Join the Contractor Service Center**.
2. Select the **Access Portal** button in the email.
3. For your first log in, enter the user name and a temporary password provided in the email. You are asked to change the password and enter a new one. When the new password is set, and you can use it to log in to the contractor service portal.

What to do next

Navigate on the contractor service center to perform various tasks to qualify you to work on the site. You can use the widgets on the Contractor Service Center to perform various tasks.

- Submit a safety incident to report it to the safety department for an investigation. For more information, see Submit a safety incident as an employee.
- Submit a safety observation to report it to the safety department for an investigation. For more information, see Submit a safety observation as an employee.
- Submit a permit-to-work request to carry out the job with significant risk. For more information, see Create a permit-to-work request.
- Submit a job safety analysis (JSA) to identify potential hazards and control measures related to these hazards at your point-of-work. For more information, see Submit a JSA from Employee Center.
- Access and view safety register documents for chemicals and asbestos. For more information, see Access a safety register document in Employee center.

Contractor Service Center reference

Using the reference topics, learn about the components, such as the roles, tables, plugins, and store applications that are installed when you install the Contractor Service Center application.

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Components installed with Contractor Service Center

Several types of components are installed with activation of the Contractor Service Center plugin, including tables, user roles, and scheduled jobs. The application also installs related store applications if they aren't already installed.

Store applications installed

Store applications installed with Contractor Service Center

Store Application	Description
Health and Safety Contractor Management [sn_hs_crm]	Installs contractor pre-qualification capabilities enabling contractors to prequalify contractor companies and their workers and monitor them in the Health and Safety application. For more information on components installed with Health and Safety Contractor Management, see Components installed with Health and Safety Contractor Management.
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.
Workplace Core [sn_wsd_core]	Enables workplace locations for Health and Safety applications. **Important:** The application installation doesn't install the location demo data for the Workplace Core location model. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.

Roles installed

Roles installed with Contractor Service Center

Role title [name]	Description	Contains roles
Contractor [sn_hs_csc.contractor]	Can access self-service capabilities in the Contractor service center to raise safety requests, permits, complete tasks, and upload documents.	• sn_ohs_im.observation_reporter • sn_hs_rm.safety_register_reader • snc_external • sn_wsd_core.workplace_user • sn_ohs_im.incident_reporter • sn_hs_rm.permit_requestor • sn_hs_rm.jsa_reporter

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Tables installed

Tables installed with Contractor Service Center

Table	Description
Contractor service portal menu [sn_hs_csc_menu]	Used to configure the menu for the service center portal.
Contractor service portal menu item [sn_hs_csc_menu_item]	Used to configure the menu items for the service center portal.

Contractor service portal menu item form

Form field description for contractor service portal menu item.

Contractor Service Center menu item form

Field	Description
Menu	Name of the menu selected.
Application	Name of the application scope.
Title	Title for the new menu item.
Subtitle	Short description of the title for the new menu item.
Icon type	Indicates the type of menu item that is displayed in the menu. • Icon card- enables the **Font icon** field. • Image card- enables the **Image** field.
Font icon	String field specifying the CSS class from FontAwesome, Glyphs or other loaded icon font. This class determines the icon displayed on the card.
Image	Reference field pointing to the db_image table, which stores system-managed images.
Type	Specifies the type of URL target that is activated when you click on the card. • Page option enables the **page** field. • URL option enables the **HREF/URL** field. • Catalog item option enables the **Catalog item** field
Page	Reference field to a service portal page.
HREF/URL	String field to add any URL.

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Contractor Service Center menu item form (continued)

Field	Description
Catalog item	Reference field to the catalog items table.
Order	Order in which the menu item appears on the portal.
Active	Active is checked by default for new instances and applies to the portals in the system.

Domain separation and Contractor Service Center

Domain separation is supported for Contractor Service Center. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Domain-separated tables overview

All tables in the Contractor Service Center can be domain-separated and include the required domain separation field.

How domain separation works in Contractor Service Center

- Each table in Contractor Service Center includes the domain separation fields **Domain** and **Domain path**.
- Customers can use these fields to configure domain separation in their implementation of Contractor Service Center r.

Related topics

Domain separation for service providers

Health and Safety Risk Management

The ServiceNow® Health and Safety Risk Management application provides capabilities to enable workers, line managers, and safety personnel to work safely and reduce the likelihood of injuries that risks or hazards create.

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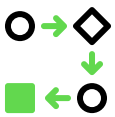
Get started

Explore  Learn how workers, line managers, and safety personnel use Health and Safety Risk Management.	Configure  Set up Health and Safety Risk Management.	Submit Job Safety Analysis (JSA)  Submit JSAs for high-risk jobs and tasks at your point of work.
Conduct risk assessment  Conduct safety risk assessments using custom risk matrixes.	Perform safety inspections and audits  Schedule, assign, and conduct workplace safety inspections and audits.	Manage safety registers  Log hazardous materials along with Safety Data Sheets (SDSs).
Manage exposure types  Identify exposure sources and track workers' exposure levels.	Permit to work  Submit and manage permit requests for high-risk jobs.	Reference  Get details about components such as roles, tables, and store applications that are installed.

Troubleshoot and get help

- Ask or answer questions in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Health and Safety Risk Management

Learn more about Health and Safety Risk Management and review the benefits it can provide for different users in your organization.

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Health and Safety Risk Management overview

Health and Safety Risk Management provides safety incident prevention capabilities in the form of tools such as Risk assessment, Job Safety Analysis (JSA), Safety registers, and Inspections and Audits.

- Safety Risk Assessment enables safety teams to conduct hazard risk assessments, to assess risk before and after the controls are applied, using custom risk matrixes. Risk assessments help organizations bolster workplace safety, help prevent incidents, and promote a safety-conscious culture by proactively managing risks tailored to their workplace environments and sectors.
- Job Safety Analysis enables employees (and line managers) to analyze job-specific hazards and identify the relevant control measures for high-risk jobs at their point of work. JSAs are intended to promote worker's hazard awareness and help prevent hazards from causing injury. Safety team can also view and assess the filed JSAs to perform risk assessments.
- Safety Register helps safety teams and line managers to track hazardous materials like chemicals and asbestos, as well as attach Safety Data Sheets (SDSs) that employees can easily access.
- Safety inspections and audits enable safety teams to build and manage safety inspections and audits. Inspections and audits support conformance with regulatory standards while reducing the risks of workplace accidents and associated costs.
- Safety exposure management enables seamless monitoring of exposures across an organization. Safety team and industrial hygienists can perform exposure assessment across different locations and follow up actions to control exposures and keep workers safe.
- The permit-to-work process helps manage formal authorization for workers who request permits to perform tasks involving significant risks. This process promotes safety, effective communication, and accountability and enhances operational efficiency.

Health and Safety Risk Management workflow

Safety risk assessment

The safety team performs the following activities via the Health and Safety Workspace to conduct their risk assessments.

- Builds risk matrixes to define levels of risk using likelihood vs severity and define risk tolerances.
- Conducts risk assessments using the predefined risk matrixes. The chosen matrix evaluates the level of risk for a risk assessment.
- Assesses risks using risk assessments in their workplace, both pre-and post-control measures. There might be multiple risks identified in a risk assessment each with its own controls. The overall level of risk both before and after controls is based on the highest identified risk from the risks and controls list.
- Risk assessment also identifies people at risk and people responsible for control of the risk.
- After a risk assessment is complete, assigns a reviewer and approver and creates recommended actions, if necessary.

Job Safety Analysis

It includes the following activities:

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- Safety team manages the hazard and controls lists in the Health and Safety Workspace.
- Safety team also maintains the job register in the Health and Safety Workspace that pre-identifies hazards and controls for jobs in their organization.
- Employees submit JSAs in Employee Center or on Now Mobile app. They can select a job or job step to pre-populate hazards and controls, or they can start from scratch with an empty JSA.

Safety registers

- Safety team manages safety registers like chemicals and asbestos in the Health and Safety Workspace. The safety team also attaches Safety Data Sheets (SDSs) to safety register records.
- Employees can search and access these SDSs in the Employee Center or on Now Mobile app.

Safety inspections and audits

Safety team members conduct safety inspections and audits at their establishments that involve the following activities:

- Inspection or audit manager pre-builds smart assessment or surveys and schedules safety inspections or audits in the Health and Safety Workspace.
- Safety inspector or auditor walks around and conducts surveys through the Employee Center or on Now Mobile app.

  They can also complete the inspection or audit surveys offline on the Mobile Agent app. Surveys completed offline are synchronized once an internet connection is established.

- Inspection or audit manager reviews the completed surveys, works on the findings and root cause analysis, and devises actions.

Safety exposure management

The Industrial hygienist carries out the following tasks via the Health and Safety Workspace to manage workplace exposures:

- Defines exposure types and associates them with relevant risk assessments and safety register records.
- Conducts exposure assessments to determine the affected workers across various locations.
- Assigns follow-up actions to confirm proper control of exposures and the safety of workers.

Permit-to-work

The permit-to-work workflow involves the following activities:

- Permit requester submits a permit to work request for a high-risk job.
- Permit approver conducts a detailed evaluation of the task and approves the permit to work request after confirming that all safety standards are met and appropriate training for the employee to perform the task is in place.
- Permit coordinator oversees regular checks conducted in conformance with permit conditions and supervises the active permit for safety.

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Health and Safety Risk Management benefits

Benefits and user personas

Benefit	Feature	Users
Access Employee Center and Now Mobile app based app that enables any worker to submit a Job safety analysis (JSA) easily. Employees can analyze their job safety at the point of work creating a JSA from scratch or start from a predefined job.	Job Safety Analysis (JSA)	• Employee • Line manager
Enable employees to use the predefined jobs and get started quickly for their JSAs by automatically populating hazards and controls for their jobs.	Job register	Risk manager
Access the safety risk assessment in the workspace to assess risks and implement effective risk mitigation strategies.	Safety risk assessment	• Line manager • Safety manager
Create and manage your visual risk matrixes that adhere to local regulations or to meet differing requirements in each establishment in your organization.	Risk Matrices	• Safety manager • Risk manager
Manage your hazards and controls lists and build and manage job register. Control measures dynamically improve the more you use them.	Risk Configuration	• Safety manager • Risk manager
Log where hazardous materials are used, along with Safety Data Sheets (SDSs).	Safety registers	• Safety manager • Line manager
Support chemical safety awareness through the Employee Center with searchable Safety Data Sheets (SDSs) for all employees.	Access Safety Data Sheets (SDSs)	• Employee • Line manager
Empower a proactive and conformant safety practice through scheduled and ad-hoc inspections and audits of assets, locations, processes, and more.	Safety inspections and audits	• Safety manager • Safety auditor • Safety inspector
Enable agents to complete inspection or audit assessments offline that are synchronized with the instance once an internet connection is restored.	Offline inspections and audits on mobile	• Safety inspector • Safety auditor
Identify exposure sources and track worker exposure levels across your organization.	Safety exposure management	• Industrial hygienist • Line manager

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Benefits and user personas (continued)

Benefit	Feature	Users
Identify hazards, implement precautions, and maintain accountability to promote a safe, controlled, and regulated execution of high-risk activities.	Permit-to-work system	• Permit requester • Permit approver • Permit coordinator

Setting up Health and Safety Risk Management

Set up your implementation for Health and Safety Risk Management by installing the application and reviewing and configuring the components that are installed with the application.

Install Health and Safety Risk Management

You can install the Health and Safety Risk Management application (sn_hs_rm) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Risk Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Health and Safety Risk Management:

- Store applications
- Roles
- Tables

For more information, see Components installed with Health and Safety Risk Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Risk Management application (sn_hs_rm) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Create a safety risk category

Create or modify a risk category to group your workplace hazards into logical categories.

Before you begin

Role required: sn_hs_rm.risk_category_manager or sn_hs_rm.risk_category_writer

Procedure

1. Select **All**.
2. In the navigation filter of the application navigator, enter the following command:
   `sn_hs_rm_risk_category.list`
   The Risk categories list appears.
3. Create a risk category or update an existing one.
   - To create a risk category, select **New**.
   - To modify an existing risk category, open it from the list.
4. On the form, fill in the fields.

Risk category details

Field	Description
Number	System-generated unique number for the risk category.
Name	Name of the risk category.
Short description	Description of the risk category.
Order	Order at which this risk category is listed on the Select hazards form when submitting a Job safety analysis (JSA).
Active	Option to mark this risk category available for use. A risk category must be active to be used.

5. Select **Submit**.

Result

- The risk category is created and saved in the Risk category [sn_hs_rm_risk_category] table.
- The category is listed in the **Risk category** field on the Hazard details form.
- It is also displayed on the Select hazards form when submitting a Job safety analysis (JSA). However, a risk category with no hazards associated with it doesn't appear on the Select hazards form.

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What to do next
Associate related hazards with the risk category. For more information, see Define Health and Safety hazards.

Define Health and Safety hazards

Identify and define potential workplace hazards related to a job or task type. Maintain a list of all hazards for all job types in your organization.

Before you begin
Role required: sn_hs_rm.risk_manager or sn_hs_rm.risk_data_manager

About this task
Review and update your hazard list regularly to verify its continued effectiveness.

Procedure
1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the configuration icon ().
3. In the **Configuration** tab, select **Hazards** and then **All**.
4. Create a hazard or modify an existing one.
   - To create a hazard, select **New**.
   - To review an existing hazard, open the one that you want to configure.
5. On the form, fill in the fields.

Hazard details

Field	Description
Risk category	Name of the risk category under which this hazard is organized. The list in this field displays items from the Risk category [sn_hs_rm_risk_category] table.
Job location	Job or task location where this job and the associated risks may arise or exists.
Active	Option to mark this hazard available for use. A hazard must be active to be used.

6. Select **Save**.
7. Add all hazards that are possible for a job and location.

Result
- The hazard is listed in the **Hazards** list under **Configuration** and is saved in the Hazard [sn_hs_rm_hazard] table.
- The hazard is available to select in the following fields:
  - **Hazard** field on the Hazard and controls form when defining a job in the job register.
  - **Add hazards** window on a JSA form.
  - **Hazard being assessed** field on the Hazard assessment form when conducting a risk assessment.

Create a safety control measure category

Create or modify a control measure category to group your safety controls into logical categories.

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Before you begin
Role required: sn_hs_rm.hierarchy_of_controls_manager or sn_hs_rm.hierarchy_of_controls_writer

Procedure

1. Select **All**.
2. In the navigation filter of the application navigator, enter the following command:
   `sn_hs_rm_hierarchy_of_controls.list`
   The Hierarchy of controls list appears.
3. Create a control measure category or update an existing one.
   - To create a category, select **New**.
   - To modify an existing one, open it from the list.
4. On the form, fill in the fields.

Hierarchy of controls details

Field	Description
Number	System-generated unique number for the control measure category.
Name	Name of the category.
Short description	Brief description of the category.
Order	Order at which this category is listed on the Select control measures form when submitting a Job safety analysis (JSA).
Active	Option to mark the category available for use. A control measure category must be active to be used.

5. Select **Submit**.

Result

- The control measure category is created and saved in the Hierarchy of controls [sn_hs_rm_hierarchy_of_controls] table.
- The category is listed in the **Control measure category** field on the Control measure form.
- It is also displayed on the Select control measures form when submitting a Job safety analysis (JSA). However, a category with no control measures associated with it doesn't appear on the Select control measures form.

What to do next
Associate related control measures with the category. For more information, see Safety control measures.

Define Health and Safety control measures

Define effective control measures to eliminate or minimize the risks associated with each workplace hazard to help prevent workplace accidents and injuries. Maintain a list of all the controls in place in your organization for every type of job and the associated risks.

Before you begin
Role required: sn_hs_rm.risk_manager or sn_hs_rm.risk_data_manager

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About this task

- Review and update your list of control measures regularly to ensure its continued effectiveness.
- Risk assessment manager can also create a control measure during the hazard assessment for a risk assessment. If a control is not available in the **Available Control Measures** field, they can select **Create new control** to define and use a new control.

  For more information, see Assess safety hazards and risk levels for a risk analysis.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the configuration icon ().
3. In the **Configuration** tab, select **control measures** and then **All**.
4. Create a control or modify an existing one.
   - To create a control, select **New**.
   - To review an existing control, open the one that you want to configure.
5. On the form, fill in the fields.

Control measure details

Field	Description
Control measure category	Category under which this control measure is organized. The list in this field displays items from the Hierarchy of controls [sn_hs_rm_hierarchy_of_controls] table. For more information on control measure categories, see Create a safety control measure category.
Job location	Job or task location where this control measure should be applied for a risk.
Active	Option to mark this control measure available for use. A control measure must be active to be used.

6. Select **Save**.
7. Add all control measures that are possible for a risk.

Result

- The control measure is listed in the **Control measures** list under **Configuration** and is saved in the Control measure [sn_hs_rm_control_measure] table.
- The control measure is available to select in the following fields:
  - **Hazard** field on the Hazard and controls form when defining a job in the job register.
  - **Add control measures** window on a JSA form.
  - **Available Control Measures** field on the Hazard assessment form when conducting a risk assessment.

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Configure a safety risk matrix

Configure a safety risk matrix to define levels of risk using likelihood vs severity and to define risk tolerances. You can review and modify the risk matrixes available with the application or add new ones for your organization.

Before you begin

Role required: sn_hs_rm.risk_manager or sn_hs_rm.risk_data_manager

About this task

This video shows an example of how to set up a 3x3 risk matrix and explains its application in assessing risk levels during a risk assessment.

https://player.vimeo.com/video/1015778828?h=79151698a6&badge=0&autopause=0&player_id=0&app_id=58479

The pre-defined risk matrixes can be used by safety team members to create and conduct risk assessments in the Health and Safety Workspace. The selected matrix is used by the risk assessment to evaluate the level of risk. For more information, see Conduct a safety risk assessment.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the configuration icon ( ).
3. In the **Configuration** tab, select **Risk matrices** and then **All**.
4. Create a risk matrix or modify an existing one.
   - To create a risk matrix, select **New**.
   - To review an existing risk matrix, open the one that you want to configure. However, if a risk matrix is already used in a risk assessment, it can't be changed.
5. On the form, fill in the fields.
   a. Describe your risk matrix and choose what kind of grid to use.
   b. Define your custom likelihood and severity descriptions.
   c. Configure your risk tolerance levels.
   For more information about field descriptions, see Risk matrix form.
6. In the **Risk matrix preview** section, preview a visual representation of the configured risk matrix.
   The heatmap shows the defined levels, colors, and ranges for the risk matrix in the real time.
7. Select **Save**.

Result

- The risk matrix is listed in the **Risk matrices** list under **Configuration** and is saved in the Risk matrix [sn_hs_rm_risk_matrix] table.
- The matrix is available for selection on the Risk assessment form when conducting a risk assessment.

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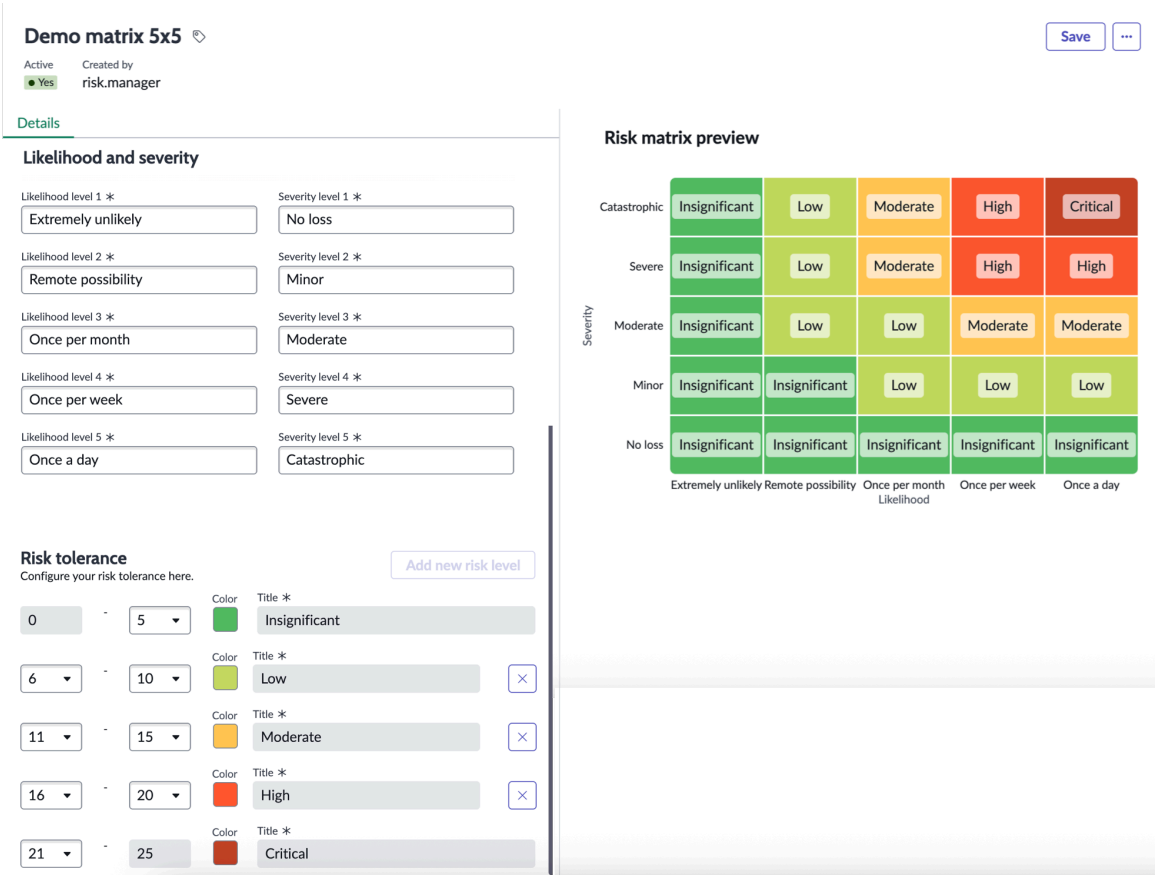
Example: 5*5 risk matrix example



Define a job in the job register

Define jobs and their steps (if any), in the job register to predefine hazards and controls for each job type in your organization.

Before you begin

Role required: sn_hs_rm.risk_manager or sn_hs_rm.risk_data_manager

About this task

A job register is a list that safety managers and line managers can use to add jobs, along with their steps, if any, for their organization. Depending on the complexity, a job can be single-step or multi-step.

Each job and job step can have associated hazards and controls. Jobs with predefined hazards and controls for each step enable you to:

- quickly submit job safety analyses (JSAs) and
- perform risk assessments.

Consequently, these predefined jobs simplify the process of submitting JSAs and conducting risk assessments by automatically populating hazards and controls.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the configuration icon ( ).
3. In the **Configuration** tab, select **Job register** and then **All**.
4. Create a job.

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Option	Steps
Using the New button	To define a job from scratch, select **New** in the list. ○ If the job has multiple steps and you want to outline the hazards and controls for each, select **Multi step**. ○ If the job is one step and you want to out line hazards and controls on the job level, select **Single step**.
Copying an existing job	Use details from an existing job to create a new one in the job register. Copying lets you have a quick start to creating a job that is simi lar in details or is applicable to a new location. To copy a job: **a.** In the list, open the job that you want to copy. **b.** Select **Copy job**. **Note:** The **Location** field value is not copied in the duplicated job.

5. On the form, fill in the fields.

Job details

Field	Description
Name	Name of this job.
Short description	Description of the job.
Job location	Location that this job or task applies to.
Active	Option for making the job available for use. A job must be active to be used.

6. Select **Save**.
7. If it's a multi-step job, add job steps.

Note: Create a job step for each task involved in the job.

a. In the **Job steps** tab, select **New**.
This tab appears only when **Multi step** is selected when creating the job.

b. On the form, fill in the fields.

c. In the **Order** field, select the order in which the job step appears.

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The value in this field determines the sequence in which job steps appear when submitting a JSA from the Employee Center.

d. Select **Save**.

8. Associate hazards and controls with the job.

Job type	Steps
For multi-step job	Add hazards and controls for each step. **a.** Navigate to **Job steps** tab. **b.** In the list, open the job step to add hazards and controls to. **c.** In the **Hazards and controls** tab, select **New**.
For single-step job	Navigate to the **Hazards and controls** tab and select **New**.

a. On the form, fill in the fields.

Hazard details

Field	Description
Number	System-generated unique number for the hazard and its controls for the job or the job step.
Hazard	Hazard associated with the job or the job step. The hazards in this field display items from the Hazard [sn_hs_rm_hazard] table.
Available control measures	All active control measures that are in place and can be added for the selected hazard. The controls in this field display items from the Control measure [sn_hs_rm_control_measure] table. Select the check box for a control measure to add it to the **Selected control measure** list.
Selected control measures	Controls that are selected to be added for the hazard.

b. Select **Save**.

If a job or a job step includes more than one hazard, create a hazard and controls record for each.

9. In the **Document links** tab, select **New** to add any document links related to the job.

10. Select **Save**.

Result

- The job is listed in the **Job register** list under **Configuration** on the Health and Safety Workspace. The job is saved in the Job [sn_hs_rm_job] table and job steps are saved in the Job step [sn_hs_rm_job_step] table.
- The job is available for selection on these forms:

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- JSA form when submitting a JSA. For more information, see Submit JSA form.
- Risks and controls form when conducting a risk assessment. For more information, see Assess safety hazards and risk levels for a risk analysis.

- The job is also available to import hazards and controls from when performing a risk assessment. For more information, see Create a risk analysis for a safety risk assessment from a job.

Configure creating actions from smart assessment questionnaire

You can configure the property that enables you to create actions for the smart assessment questionnaire. This action creation can be enabled for one or more questions as needed.

Before you begin

Role required: sn_hs_rm.safety_inspection_manager or admin

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the property **Smart assessment fields enables for action creation. Please mention the sys_id of the questions for which we need to have the in-line action enabled**, enter the sys_id for each question that needs action creation enabled.
   For information on how to access the sys_id, see Unique record identifier (sys_id).
3. Select **Save**.

Result

- The **More actions** icon (⋯) appears for configured questions in a smart assessment questionnaire and when selected, shows the **Actions list** button.
- In the **Assessment action list** page within a smart assessment, selecting **More actions** again shows the **Create action** button, which enables users to add actions or findings for that question.

  For more information on creating action or findings, see Create actions or findings for the smart assessment questionnaire.

Configure the smart assessment template for safety inspections and audits

You can create smart assessment templates and add instructions, questions, and reference information by using the template designer in the Smart Assessment Engine application.

Before you begin

- Smart assessments are built using the ServiceNow® Smart Assessment Engine (SAE) application. Familiarize yourself with the Smart Assessment Engine.
- Verify that the application scope is selected as Health and Safety Risk Management. For more information, see Application picker.

Role required: sn_hs_rm.safety_inspection_manager or sn_hs_rm.safety_audit_manager

About this task

You can also convert your existing Survey templates related to Health and Safety into Smart Assessment templates using the Smart Assessment Engine migration tool. For more information, see Creating an assessment template from legacy assessment metric types.

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Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the **Workspaces** tab and then select the **Assessment workspace**.

   For more information on creating the smart assessment template, see Create an assessment template.
3. In the **Purpose** field on the **Smart assessment template** form, select **Health and Safety**.
   You can also configure a category role for a specific purpose. For more information, see Create an assessment template category.
4. In the **Assessment target** field, select the target table where this smart assessment is needed.
   - For smart assessment for inspections, select the Inspection [sn_hs_rm_inspection] table
   - For smart assessment for audits, select the Audit survey [sn_hs_rm_audit_survey] table.
5. Select **Create**.
6. In the template designer, add instructions and questions.
   For more information, see Add instructions and questions to an assessment template.
7. In the template designer, add the assessment role to access the smart assessment.

   a. Select the **General** tab and then select **Settings**.

   b. In the **Assessment reader role** field, select [sn_smart_asmt.assessment_reader] role or any role that contains this role.

   > **Important:** Only the role selected here can access the smart assessments that uses this template. This role can complete the smart assessment, assign it, and create actions or findings for the smart assessment questionnaire.

What to do next

You can configure which question in the smart assessment should have action creation enabled. For more information, see Configure creating actions from smart assessment questionnaire.

Configure a safety inspection or audit survey

Review surveys available with the Health and Safety Risk Management application. Modify the survey, or create one or more surveys to use for different workplaces or to check other areas of concern.

Before you begin

- Surveys are built with the ServiceNow® Survey designer. So, familiarize yourself with Survey administration.
- Ensure that the application scope is selected as Health and Safety Risk Management. For more information, see Application picker.

Role required: sn_hs_rm.safety_inspection_manager, sn_hs_rm.safety_audit_manager, survey_creator, or admin

About this task

You can convert your existing Survey templates related to Health and Safety into Smart Assessment templates using the Smart Assessment Engine migration tool. For more information, see Creating an assessment template from legacy assessment metric types.

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Procedure

1. Navigate to **All** > **Surveys** > **View Surveys**.
2. Create a new survey or modify an existing one.
   - To create a survey, click **New** or **Survey Designer**.
   - To modify a predefined one, filter the list to show the surveys for the Health and Safety Risk Management application and open the desired survey.
   - For information on building and updating surveys, see Survey designer.
   - **Tip:** When assigned to a user, any survey created via the ServiceNow® Assessments and Surveys is available under **My Assessments and Surveys** in the Employee Center. Therefore, it might be a good idea that your survey has the same name as your inspection or audit record. This helps identify the inspection or audit survey quickly in the list of other assessments and surveys the user has been assigned.
3. In the **Source table** field, select the source table.
   - For an inspection survey, select the Inspection [sn_hs_rm_inspection] table.
   - For an audit survey, select the Audit survey [sn_hs_rm_audit_survey] table.

Important: Selecting this table makes this survey available for selection in the **Inspection survey** or **Audit survey** field on respective safety inspection or audit records.

Result
The survey is available for selection in the safety inspection or safety audit records.

What to do next

- Associate the survey to safety inspections or audits. You can associate any of your pre-built surveys with inspection or audit records in Health and Safety Risk Management.
- You can also configure which survey field types should display the **Create action** check box when completing an inspection or audit from the mobile app. This enables the inspection and audit agents to create any actions on the go related to specific questions. For more information, see Configure the create action check box for safety inspection survey in the Mobile Agent app.

Define a category and measurement unit for an exposure type

Define a category and measurement unit for an exposure type. If needed, you can also associate a subcategory with an exposure type category.

Before you begin
Verify that the application scope is selected as Health and Safety Risk Management. For more information, see Application picker.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Create an exposure category or update an existing one.

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a. Select to open the Exposure type [sn_hs_rm_exposure_type] table.

b. In the **Columns** tab, select `Exposure category` from the list.

c. In the **Choices** tab, select **New**.

d. Fill in the fields.
The value set in the **Value** field is used to associate a sub-category or a measurement unit with this category.

e. Select **Submit**.

3. **Optional:** Associate a subcategory with an exposure category.

a. In the **Columns** tab of the Exposure type [sn_hs_rm_exposure_type] table, select the `Exposure sub-category` from the list.

b. In the **Choices** tab, select **New** and fill in the fields.

c. In the **Dependent value** field, copy the exposure category's **Value** field defined in step 2d. This associates the subcategory with the required category.

d. Select **Submit**.

The subcategory is listed as a choice in the **Sub-category** field for the associated exposure category when creating an exposure type. For more information, see Define an exposure type.

4. Add a measurement unit for an exposure category.

a. Select to open the Measurement [sn_hs_rm_measurement] table.

b. In the **Columns** tab, select `Measurement unit` from the list.

c. In the **Choices** tab, select **New** and fill in the fields.

d. In the **Dependent value** field, copy the exposure category's **Value** field defined in step 2d. The value in the **Dependent value** field links the measurement unit with the required exposure category.

e. Select **Submit**.

The measurement unit is listed as a choice in the **Measurement unit** field during an exposure assessment for the exposure type. For more information, see Add a measurement and exposure source for an exposure assessment.

Configure permit-to-work

Configure permit type, permit checklist, checklist type, and edit a permit form.

Permit-to-work can be configured by an admin. An admin must assign the following roles to the permit coordinator [sn_hs_rm.permit_coordinator] to enable them to configure permit-to-work.

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- catalog_admin
- decision_rule_author
- personalize_choices
- personalize_dictionary
- snc_internal
- sn_hs_rm.permit_coordinator

Configure a permit-to-work request

Edit existing questions on a permit to work form or add new questions.

Before you begin

Role required: admin and sn_hs_rm.permit_coordinator

Procedure

1. Navigate to **All** > **Service catalog** > **Catalog definitions** > **Record producers**.
2. Search for and select **Request a permit to work**.
3. Either add new questions or edit existing questions.

Goal	Actions
Add a new question	**a.** In the Variables related list, select **New**. **b.** On theVariable new record form, fill in the fields. For a description of the field values, see Variable new record form. **c.** Select **Submit**.
Modify an existing question	**a.** In the Variables related list, select the exist ing question. **b.** Edit the information. **c.** Select **Update**.

Configure a permit type

Create a permit type to categorize risk and safety requirements for different types of work.

Before you begin

Role required: admin and sn_hs_rm.permit_coordinator

About this task

A permit type is a specific category of permit that addresses unique risks and safety requirements for different kinds of work. Selecting a permit type when filling out a permit to work request automatically adds related questions specific to that permit type.

Procedure

1. Navigate to **All** > **System definition** > **Tables**.
2. Search in the **Label** column for `permits` and select the **Permits to work** table.

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3. In the **Columns** tab, search for and select **Permit type**.
4. If the Dictionary entry for the permit type displays a message about the application scope, select **here** to be able to edit the record.
5. Select the Choices related list and select **New**.
6. On the Choice new record form, fill in the fields.
   For a description of the field values, see Choice new record form.
7. Select **Submit**.
   A new permit type is created which appears in the **Permit type** field of the permit-to-work request form. Repeat the steps to create multiple permit types.
8. Automatically display questions specific to a permit type when the user selects it on the permit-to-work request form by creating a variable set for each permit type. For more information on variable sets and the layout, see Variable set layout.
   a. Navigate to **All** > **Service catalog** > **Catalog definitions** > **Record producers**.
   b. Search for and select **Request a permit to work**.
   c. If the request form displays a message about the application scope, select **here** to be able to edit the record.
   d. On the **Variable sets** tab of the related list, select **New**.
   e. Create a variable set with grouped variables by selecting **Single row variable set**.
   f. On the Variable set new record form, fill in the fields..

      For a description of the field values, see Variable set new record form.

   g. Select **Submit**.
   h. Repeat these steps for each permit type.
9. Add customized questions to the permit type.
   a. Open a variable set.
   b. On the Variable new record form, fill in the fields.
   c. For a description, see Variable new record form.
   d. Select **Submit**.
10. Link the variable set to the permit type.
    a. Navigate to **All** > **System definition** > **Decision tables**.
    b. Search for and select **Permit type configuration**.
    c. Select **Create Draft**.
    d. In the **Conditions** section, select **Add new decision row**.
    e. In the **Permit type** column, select the permit type in the **Choice input** field. Select **OK**.
    f. In the **ariable set** column, select the variable set in the **Choice input** field. Select **OK**.
    g. Select **Save**.
    h. Select **Publish** and then select **Publish** again in the confirmation dialog box.
    The variable set with the questions is linked with the permit type and these questions appear on the permit-to-work request form when the permit type is selected.

Configure a permit checklist

Create a permit checklist and link it to the permit type of a permit-to-work request.

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Before you begin

Role required: admin and sn_hs_rm.permit_coordinator

Procedure

1. Navigate to **All** > **Service catalog** > **Catalog definitions** > **Record producers**.
2. Search for and select **Permit checklist** record.
3. Select the Variable sets related list and select **New**.
4. Create a variable set with grouped variables by selecting **single row variable set** .
5. On the Variable set new record form, fill in the fields.
   For a description of the field values, see Variable set new record form.
6. Select **Submit**.
   The new variable set is created.
7. Open the new variable set and on the form fill in the fields.
   For more information on the field description, see Variable new record form.
8. Select **Submit**.
9. Create a checklist type.
   a. Navigate to **All** > **System definition** > **Tables**.
   b. Search in the **Label** column for `Permit checklist` and select the table.
   c. Select **Checklist type** in the **Column label** related list.
   d. If the request form displays a message about the application scope, select **here** to be able to edit the record.
   e. Select the Choices related list and select **New**.
   f. On the form, fill in the fields.

      For more information on the field description, see Choice new record form.
   g. Select **Submit**.
10. Associate the checklist to a permit type.
    a. Navigate to **All** > **System definition** > **Decision tables** and select **Permit checklist configuration**.
    b. Select **Draft** and select **Add new decision row**.
    c. Select the empty cell in the **permit type** column and select the permit type in the **Choice input** field in the **permit type**, then select **OK**.
    d. Select the empty cell in the **checklist type** column and select the checklist type in the **Choice input** field, then select **OK**.
    e. Select the empty cell in the **variable set** column and select the variable set in the **Choice input** field, then select **OK**.
    f. Select **Save**.
    g. Select **Publish** and then select **Publish** in the modal dialogue.
11. Create a flow for the checklist type.

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a. Navigate to **All** > **Process Automation** > **Flow Designer**.

b. Select the **Flows** tab and then select the **Create permit checklist when permit created** flow.

c. Select **Duplicate action** for the existing **Create permit checklist record** action.

The flows are built using ServiceNow Workflow Studio, so make sure you're familiar with the Flow Designer basics.

For information on how to create or modify flows, see Create a flow.

d. Select the new checklist type in the **Checklist type** field.

e. Select **Save** and then select **Activate**.

Result
The checklist is configured and displayed in the checklist tab of the permit-to-work request form when the permit type is selected.

Using Health and Safety Risk Management

Learn how employees and risk teams use the Health and Safety Risk Management application to perform job safety analyses, perform risk assessments, maintain safety registers, conduct safety inspections and audits, and manage exposures for their workplace.

Key capabilities of Health and Safety Risk Management

Job Safety Analysis (JSA)

- Perform Job Safety Analyses
- Import JSA job steps from the job register

Safety risk assessment

- Configure risk matrices
- Perform risk assessments

Safety inspections and audits

- Conduct inspections and audits using Assessments and Surveys
- Complete offline inspections and audits on the Mobile Agent app

Safety registers

- Log hazardous materials used along with Safety Data Sheets (SDSs)
- Access these SDSs in the Employee Center or on Now Mobile app

Exposure management

- Track and manage workers' exposure to workplace hazards
- Schedule actions to control the exposures

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Job safety analysis

Job safety analysis (JSA) is a systematic process for identifying potential hazards at a worker's point-of-work. The objective is to increase risk awareness and implement efficient controls to help prevent workplace accidents and injuries.

Any employee in a company working on high-risk activities may complete JSAs. They typically complete a JSA before commencing the high-risk activity with the aim of identifying any hazards and ensuring adequate controls before starting the task. They may identify new hazards or controls, or previously identified ones for their task. Since JSA is a point-of-work assessment, it would typically be done on a mobile device.

JSA provides the following capabilities:

- Employees can assess risks at their point-of-work and the control measures available for them.
- Pre-defined jobs in job register that enable employees to file JSAs quickly.
- Control measures that dynamically improve the more you use them.

Submit a JSA from Employee Center

Submit a job safety analysis (JSA) to identify potential hazards and control measures related to these hazards at your point-of-work.

Before you begin

Role required: sn_hs_rm.jsa_reporter

About this task

Employees can also submit JSAs from their mobile device using the ServiceNow® Now Mobile app. For more information, see Submit a JSA through the Now Mobile app.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. Select the **Health and Safety** menu.
3. Create a JSA.

Option	Steps
From Health and Safety menu	To start a JSA from scratch: **a.** Under **Health and Safety** menu, select **Job safety analysis**. **b.** Select **Submit a JSA**. An empty JSA form opens.
From a previously submitted JSA	To reuse a JSA that you submitted previously to save time: **a.** Under the **Quick links**, select **View my JSAs**. **b.** In the list, open the JSA that you want to copy. **c.** Select **Copy JSA**. A JSA form with values copied from the previ ous JSA opens.

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4. On the form, fill in the fields.

   a. Enter details of the job or task you're about to start.

   b. Add any identified hazards.

   c. Add any control measures that are in place.

      Tip: Select a job in the **Select job** field to auto-populate predefined hazards and controls for your job type and quickly submit your JSA. For more information about pre-defined jobs, see Job register.

   d. Add any employees or workers who have been informed along with your comments or attachments.

   For more information on JSA field descriptions, see JSA form.

5. Select **Submit**.

Result

- The JSA is submitted for your job or task. To view your submitted JSAs, navigate to the **Health and Safety** menu in the Employee Center and then the **View my JSAs** quick link.
- The JSA is also listed in the JSAs list on Health and Safety Workspace. A risk manager [sn_hs_rm.jsa_manager] can view all the filed JSAs by navigating to the Health and Safety Workspace and selecting the risk management icon ( ) and then selecting the **JSAs** list.

View submitted JSAs in the workspace

View all submitted JSAs in Health and Safety Workspace. All JSAs that employees have submitted through the Employee Center or ServiceNow® Now Mobile app are available to view in the workspace.

Before you begin

Role required: sn_hs_rm.jsa_manager or sn_hs_rm.job_safety_analysis_reader

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. Select the **JSAs** list.
   - For active JSAs, select **Active**.
   - For all JSAs, including both active and expired, select **All**.
4. In the list, select the record to view.
5. **Optional:** Research content related to the JSA by selecting the Agent assist icon ( ). Agent assist searches the knowledge base using the text from the JSA's **Short description** field and shows relevant articles.

Safety risk assessment

The Risk Assessment is a process of identifying and evaluating potential hazards and risks associated with a process, system, product, or activity, and implementing measures that help

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prevent or mitigate those risks. The feature enables the safety of people and proactively reduce safety incident rates.

The safety team performs the following activities via the Health and Safety Workspace to conduct their risk assessments.

- Identify and maintain a list of potential hazards associated with each job type. They also develop and implement effective control measures to eliminate or minimize the risks associated with each hazard.
- Build risk matrixes to define levels of risk for identified hazards.
- Create and manage risk assessments to assess risk using predefined risk matrixes.
- Schedule recommended actions for risk assessments, if applicable.
- If a review and approval are required, assign the assessment to appropriate users.
- Assigned users review and approve the assessments via Employee Center.

Conduct a safety risk assessment

Conduct a safety risk assessment to identify and manage potential hazards and risks, and to ensure the safety of your employees and the public.

Before you begin

Role required: sn_hs_rm.risk_assessment_manager or sn_hs_rm.risk_assessment_writer

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. Select the **Risk assessment** list and then **All**.
4. Select **New** to start a risk assessment.
5. On the form, fill in the fields.
   Enter details such as who is at risk, who is responsible for controls, who reviews, and who approves this risk assessment.

   For more information on risk field descriptions, see Risk assessment form.
6. **Optional:** If necessary, attach an image about the risk using the add attachments icon ( ).
7. **Optional:** Research content related to the risk assessment by selecting the Agent assist icon ( ).
   Agent assist searches the knowledge base using the text from the risk assessment's **Short description** field and shows relevant articles.
8. Select **Save**.
   The **Risk analyses**, **Risk actions**, and **Action schedules** tabs appear for this risk assessment.
9. In the **Risk analyses** tab, add risk analysis records to evaluate the risk level of identified hazards.
   For more information, see Perform risk analysis for a safety risk assessment and Create a risk analysis from a job.
10. In the **Action schedules** tab, set up actions to address an identified risk or implement control measures necessary to improve workplace safety.
    The action schedule creates actions in the **Risk actions** tab and auto-assigns them to individuals using the condition builder. For more information, see Create a Health and Safety action schedule.

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11. In the **Details** tab, mark the risk assessment as complete when all associated risk analyses are finished.
    a. In the **Assessment completed** field, select the completion date.
    b. Set the **State** field to Complete.

Result

- The overall level of risk, both before and after controls, is based on the severity and likelihood of each hazard that is listed in the **Risk analyses** tab. It is determined based on the highest identified risk in the **Risk analyses** list.
- The computed risk levels appear in the **Inherent risk** and **Residual risk** fields in the risk assessment's form header.

What to do next

After the risk assessment is complete, assign a reviewer and approver for it, if necessary. Only a user with the Risk assessment approver [sn_hs_rm.risk_assessment_approver] role can be assigned as an approver.

Perform risk analysis for a safety risk assessment

For a risk assessment, perform risk analyses of identified hazards and choose control measures to assess how they impact and mitigate the hazard.

Before you begin

Role required: sn_hs_rm.risk_assessment_manager or sn_hs_rm.risk_assessment_writer

About this task

A risk analysis can be associated with job steps in a job and have their inherent and residual risk assessed.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Risk assessment** list and then **All**.
4. Open the risk assessment to perform the risk analysis for.
5. In the **Risk analyses** tab, add risk analysis records.

Option	Steps
Import from predefined job	To create risk analyses by importing hazards and controls from a predefined job, see Create a risk analysis from a job.
Create in Risk analyses tab	To add a risk analysis manually, **a.** In the **Risk analyses** list, select **New**. **b.** On the form, fill in the fields and select **Save**.

6. In the **Hazard assessments** tab of a risk analysis, review hazards and their controls to assess their risk levels.
   For more information on how the risk level for a hazard is evaluated, see Assess safety hazards and risk levels for a risk analysis.

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The inherent and residual risk levels (severity and likelihood) on the risk analysis form are calculated from the corresponding risk levels in its associated hazard assessments.

7. When hazard assessments of all identified hazards in a risk analysis are complete, set the **State** of the risk analysis as Complete.
8. Repeat steps 6 and 7 for each risk analysis record in the risk assessment.
9. When all risk analyses in the risk assessment are complete, visualize the risk level (severity and likelihood) in the **Risk matrix** section.
   - Select **Inherent risk view** to view the risk level of associated hazards before controls.
   - Select **Residual risk view** to view the risk level of associated hazards after controls have been put in place.

   The number in the risk matrix shows the count of this risk level from all listed risk analyses in the assessment.

Result

- All risk analysis records for this assessment appear in the **Risk analyses** list under the Risk analyses tab.
- The overall level of inherent and residual risk is determined based on the highest identified risk in the **Risk analyses** list.
- The computed risk levels from all risk analyses appear in the **Inherent risk** and **Residual risk** fields in the risk assessment's form header.

Create a risk analysis for a safety risk assessment from a job

Create a risk analysis by importing hazards and controls from a predefined job in the job register to a risk assessment.

Before you begin

Role required: sn_hs_rm.risk_assessment_manager or sn_hs_rm.risk_assessment_writer

About this task

You can conduct a risk assessment for the jobs in your organization to identify associated hazards and assign a risk rating to each job hazard. For information on predefined jobs, see Jobs in the job register.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Risk assessment** list and then **All**.
4. Open the risk assessment to create the risk analysis for.
5. Select **Create risk analyses**.
6. In the **Select jobs** field, select the job to import hazards and controls from.
7. Select **Create**.
   A risk analysis record is created for each job step in the selected job. For a job with no steps, only one risk analysis record is created.
8. In the **Hazard assessments** tab of each risk analysis, review the imported hazards and their controls to assess their risk levels.
   For more information on how the risk level for a hazard is evaluated, see Assess safety hazards and risk levels for a risk analysis.

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Result

- All hazards and controls from the selected job are imported in the risk assessment.
- A risk analysis record is created for each job step in the selected job. These risk analysis records appear in the **Risk analyses** list under the Risk analyses tab of the assessment.
- The imported hazards and their controls are listed in the **Hazard assessments** tab of risk analysis records.

Assess safety hazards and risk levels for a risk analysis

Review the identified hazards in a risk analysis and choose their control measures to assess how they impact and mitigate the risk.

Before you begin

Role required: sn_hs_rm.risk_assessment_manager or sn_hs_rm.risk_assessment_writer

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Risk assessment** list and then open the risk assessment.
4. In the **Risk analyses** tab, open the risk analysis containing the hazard.
5. In the **Hazard assessments** tab of the risk analysis, review hazards and their controls to assess their risk levels.
   - To create a new hazard assessment, select **New**.
   - To review the hazards and controls that are imported from a predefined job, select from the list.

     For more information, see Create a risk analysis for a safety risk assessment from a job.
6. On the form, fill in the fields.

   a. Select a hazard to perform its assessment.
   If this hazard assessment is for a predefined job in the job register, select the job and the applicable job step. For more information on job register, see Jobs in job register.

   b. Identify what effect this hazard could have, for example, burns.

   c. Select control measures that could help prevent this hazard.
   To define and use a control that is not available in the **Available Control Measures** field, select **Create new control**. For more information, see Define Health and Safety control measures.

   d. In **Inherent severity** and **Inherent likelihood** fields, choose the severity and likelihood of this hazard before controls.

   e. In **Residual severity** and **Residual likelihood** fields, choose what the severity and likelihood of this hazard is, after those controls have been put in place.

   For information on field descriptions, see Hazard assessment form.
7. Select **Save**.

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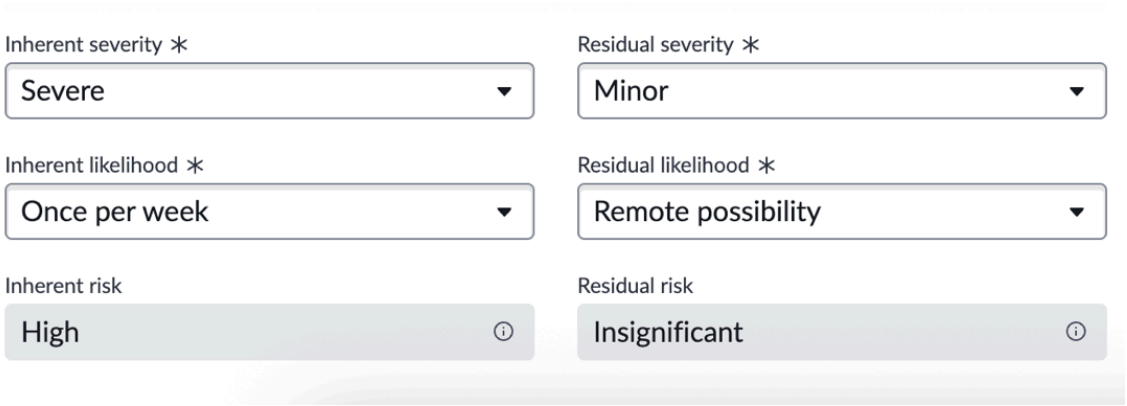
Result

- The risk matrix used in the associated risk assessment evaluates the risk level for the hazard.
  - The severity and likelihood of the hazard before controls are evaluated to show the hazard's risk level in the **Inherent risk** field on the form.
  - The severity and likelihood of the hazard after controls are evaluated to show the hazard's risk level in the **Residual risk** field on the form. After controls, the risk level should be reduced.



For more information on risk level calculation, see Risk matrix form.

- The hazard assessment is listed in the **Hazard assessments** tab of the risk analysis.

What to do next

If a risk analysis includes more than one hazard, perform a hazard assessment for each.

Add an action for a safety risk

Add an action to address an identified risk or implement control measures necessary to improve workplace safety. You can add multiple actions for a hazard or control measure.

Before you begin

Role required: sn_hs_rm.risk_assessment_manager or sn_hs_rm.risk_assessment_writer

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ( ) to open the **Risk assessment** list.
3. Create an action from a risk assessment record or the Risk actions list.

Option	Steps
From a Risk assessment record (Scheduled actions)	**a.** Select the **Risk assessments** list and then **All**. **b.** In the list, open a risk assessment. **c.** In the **Action schedules** tab, set up actions for the risk assessment. For more information, see Create a Health and Safety action schedule.

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Option	Steps
	The action schedule creates actions in the **Risk actions** tab and auto-assigns them to individuals using the condition builder.
From the Risk actions list	**a.** Select the **Risk actions** list and then **All**. **b.** Select **New**. **c.** On the form, fill in the fields. For information on field descriptions, see Health and Safety action form. **d.** Select **Save**.

Result

- If associated with a risk assessment, the action appears in the list of actions in the **Risk actions** tab of that assessment. The action is also listed in the **Risk actions** list on Health and Safety Workspace.
- The action appears in the assigned user's **My Tasks** list on both the Employee Center and the Now Mobile app. From either location, the user can respond to the action and update its status.

What to do next

If needed, you can share the action, independent of the risk, with other groups or agents, so that they can prevent the similar hazard from happening at any of their locations. To share an action, select **Copy action**.

- The action is duplicated and appears in the **My Tasks** list of the assigned user on the Employee Center.
- The action is also listed in the **Actions** list on the Health and Safety Workspace.

Safety inspections and audits

With Health and Safety Risk Management, safety teams can schedule, assign, and conduct workplace safety inspections and audits of particular activities, processes, or areas at their establishments.

Safety inspections and audits within the Health and Safety Workspace enhance the efficiency, accuracy, and consistency of safety inspections and audits across your organization. The objective is to support conformance with regulatory standards while reducing the risks of workplace accidents.

Safety inspections and audits capabilities

The safety inspections and audits feature provides the following capabilities:

Build and manage safety inspections and audits

- Use smart assessment templates available with the application or build new ones with the Smart Assessment Engine. For more information, see Smart assessment template designer.
- Use available surveys or design new ones with the Survey designer. For more information, see Survey designer.

Schedule inspections and audits

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Schedule inspections and audits to be completed at regular intervals with the Inspection Scheduler and Audit Scheduler.

Complete inspections and audits

- Fill out smart assessment questionnaires via mobile or Health and Safety Workspace. When online, you can partially save a smart assessment to finish it later, or to reassign it to another agent to complete the remaining assessment.
- Conduct inspection and audit surveys through Employee Center or on mobile.

Note: You can complete smart assessments and surveys offline using the Mobile Agent app. Any smart assessments or surveys completed offline automatically synchronize once an internet connection is established. For more information, see Complete a safety inspection or audit survey in the offline mode.

Create actions and findings from smart assessments and surveys

Add actions and findings for specific questions while completing smart assessments or surveys.

Maintain related documents

Add documents enabling standards or regulatory documents to be used as a reference for audit findings.

Set up a safety inspection schedule

Set up an inspection schedule to create a safety inspection at a future date, or to schedule recurring safety inspections, such as daily or weekly, or monthly at once.

Before you begin

Role required: sn_hs_rm.safety_inspection_manager and sn_hs_rm.inspection_schedule_writer

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Inspection schedules** list and then **All**.
4. Select **New** to create an inspection schedule.
5. On the form, fill in the fields.
   Enter inspection details and the duration. For more information on inspection field descriptions, see Inspection schedule form.
6. Select **Save**.
   The **Scheduled inspections** tab and the **Create inspections** button appear for this record.
7. To generate the inspection records immediately, select **Create inspections**.
   - Select **Create next scheduled inspection** to create the first upcoming inspection from the selected start date. Subsequent inspection records are automatically created one by one on scheduled dates, based on the defined duration and frequency.
   - Select **Create all scheduled inspection at once** to create all scheduled inspections immediately.

Note: If you don't use the **Create inspections** button, the system will automatically create the inspection records. They are generated one by one from the start date, based on the duration and selected frequency of the inspection schedule.

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Result

- All inspection records for an inspection schedule are generated in its **Scheduled inspections** tab. These inspection records are also available under **Inspections** > **All** list.
- All required fields are copied from the inspection schedule to its inspection records.
- The assigned user receives a notification to complete the smart assessment or survey for the generated inspections. If the inspection format is digital, the notification includes a direct link to access the assessment or survey.
  - A smart assessment can be completed in the mobile app. For more information, see Complete a smart assessment from mobile.
  - A survey can be completed either in the Employee Center or the mobile app. For more information, see Complete an inspection survey from the Employee Center.

What to do next

In the **Scheduled inspections** tab, open the completed inspections, review the results, and add findings, RCA, and actions as needed.

Create and manage a safety inspection

Create a safety inspection to manage your workplace inspection of a particular activity, process, or an area. Review the questionnaire responses and add findings, root cause analyses (RCA), and actions for the inspection.

Before you begin

Role required: sn_hs_rm.safety_inspection_manager or sn_hs_rm.safety_inspection_writer

About this task

You can also set up an inspection schedule to schedule recurring safety inspections. For more information, see Set up a safety inspection schedule.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Inspections** list and then **All**.
4. Select **New** to create an inspection.
5. On the form, fill in the fields.
   Enter details such as inspection format, smart assessment or survey to use for this inspection, risk matrix used for risk assessments for this inspection, and a due date to complete the inspection.

   For more information on inspection field descriptions, see Inspection schedule form.
6. Select **Save**.
   - Based on the **Assessment type** field, the following tabs appear for this inspection:
     - For a smart assessment: **Questionnaire results**, **Findings and RCA**, and **Inspection actions**.
     - For an inspection survey: **Inspection survey results**, **Findings and RCA**, and **Inspection actions**.
   - The associated smart assessment or inspection survey is assigned for completion.

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- The assigned user receives a notification to complete the smart assessment or survey. If the inspection format is digital, the notification includes a direct link to access the assessment or survey.
  - A smart assessment can be completed from the mobile app. For more information, see Complete a smart assessment from mobile.
  - A survey can be completed either in the Employee Center or the mobile app. For more information, see Complete an inspection survey from the Employee Center.

7. Review the smart assessment or inspection survey responses that are submitted by the assigned user.
   When completed, the assessment results for this inspection are available in the following tabs:
   - **Questionnaire results** tab for a smart assessment.
   - **Inspection survey results** tab for an inspection survey.
8. **Optional:** If needed, complete the assessment directly from the inspection record in the workspace.
   - For a smart assessment, select **Open inspection smart assessment**.

     Note: Only a user with the **Assessment reader role** can access and complete this smart assessment. This role is set during the smart assessment template configuration. For more information, see Configure the smart assessment template for safety inspections and audits.

   - For an inspection survey, select **Open inspection survey**.

   These buttons appear only when the **Inspection format** is set to **Digital**.
9. In the **Findings and RCA** tab, work on the inspection findings, and perform an RCA for this inspection.
   For more information, see Add a finding and root cause analysis for a safety inspection.

   Note: Inspection agents can also create actions and findings for specific questions while completing a smart assessment or survey in the mobile app. When an agent creates an action for a question, the system also generates a related finding record based on the response. The finding then appears in this tab in workspace. For more information, see Create actions and findings for the smart assessment questionnaire from mobile app.

10. If applicable, add actions for findings in the **Inspection actions** tab.
    For more information, see Add an action for a safety inspection or audit.

    Note: Any actions created for specific questions while completing the smart assessment or survey in the Employee Center or mobile app also appear in this tab.

11. In the **Details** tab, set the state to Closed Complete after all inspection activities are complete and then select **Save**.
    The inspection moves to the Closed Complete state.

Set up a safety audit schedule

Create an audit schedule and define the top-level audit details and the recurrence, for example, monthly or bi-monthly.

Before you begin

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.audit_schedule_writer

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select **Audit schedules** list and then **All**.
4. Select **New** to create an audit schedule.
5. On the form, fill in the fields.
   Define the audit scope, finalize the goals, and choose regulations for the audit so that the audit process is well structured and organized. For more information on audit field descriptions, see Audit schedule form.
6. Select **Save**.
   The **Audit questionnaires** and **Scheduled audits** tabs appear for this audit.
7. In the **Audit questionnaires** tab, select **New** to add smart assessment or surveys to be added to each scheduled audit.
   - For information on audit questionnaire field descriptions, see Audit questionnaire form.
   - Audit surveys can also be added to each scheduled audit individually after they're scheduled.
8. To generate the scheduled audit records immediately, select **Create audits**.
   If an audit survey has not been created, a message prompts you to create one before scheduling audits.
   - Select **Create next scheduled audit** to create the first upcoming audit from the selected start date. Subsequent audit records are automatically created one by one on scheduled dates, based on the defined duration and frequency.
   - Select **Create all scheduled audits at once** to create all scheduled audits immediately.

   Note: If you don't use the **Create audits** button, the system will automatically create the audit records. They are generated one by one from the start date, based on the duration and selected frequency of the inspection schedule.
9. In the **Scheduled audits** tab, add details, for example, objectives and people involved and their responsibilities, to each scheduled audit record.
   For information on completing an audit, see, Create and manage a safety audit.

Result

- Audit records are generated based on the duration and the selected frequency of the audit schedule.
- All audit records for an audit schedule are generated in its **Scheduled audits** tab. These audit records are also available under **Audits** > **All** list.
- All required fields are copied from the audit schedule and audit questionnaire to its scheduled audit records.
- Any audit questionnaire created for a schedule are automatically added to all its audit records.
- The assigned user receives a notification to complete the smart assessment or survey for the generated audits. They can complete the audit in the Employee Center or in the mobile app.
  - A smart assessment can be completed in the mobile app. For more information, see Complete a smart assessment from mobile.
  - A survey can be completed either in the Employee Center or the mobile app. For more information, see Complete a survey from the Employee Center.

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Create and manage a safety audit

Create a safety audit for a process or regulation with formalized assessment criteria, and record the information collected at each stage—before, during, and after the audit.

Before you begin

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

You can also set up an audit schedule to generate recurring safety audits. For more information, see Set up a safety audit schedule.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. Select the **Audits** list and then **All**.
4. Select **New** and then select an audit creation method.

Option	Steps
Add to audit schedule	Select this option to create this audit as part of an existing audit schedule. **a.** In the **Audit schedule** field, select the audit schedule to add this audit record to. **b.** Select **Create**.
Standalone audit	Select this option to create an independent audit. **a.** In the **Regulatory audit** field, indicate the audit's regulatory status. **b.** Enter short description and audit goals. **c.** Select **Create**.

   The **Overview**, **Details**, **Objectives**, **People involved**, **Documents**, **Audit questionnaires**, **Findings**, **Risk assessments**, **Audit actions**, **Audit schedule**, **Approvers**, and **Results** tabs appear for this audit.
5. In the **Details** tab, fill in the fields.
   Enter details such as the audit scope, its goals, regulation for the audit, and a start and end date.

   For information on audit field descriptions, see Audit schedule form.
6. In the **People involved** tab, add people involved in this audit and their responsibilities.
   For more information, see Add people involved in a safety audit.
7. In the **Objectives** tab, define the audit objectives, the criteria used as benchmarks, and the items to be reviewed for this audit.
   - For more information, see Define an objective for a safety audit.
   - Alternatively, if you have a previous audit with a similar scope, select **Import scope** to pre-populate these sections rather than entering them manually. For more information, see Import scope from an existing safety audit.
8. In the **Documents** tab, add standards and documents used to benchmark findings.

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- Select **Add** to add an existing document from Health and Safety document library.
- Select **New** to upload a new document. For field descriptions, see Health and Safety document version form.

9. In the **Audit questionnaires** tab, add and assign smart assessments or surveys to be conducted as part of this audit.
   If the audit is part of an audit schedule with an associated audit questionnaire, that questionnaire is automatically added to the audit record. For information on audit questionnaire field descriptions, see Audit questionnaire form.
   - The assigned user receives a notification to complete the smart assessment or survey.
   - A smart assessment can be completed in the mobile app. For more information, see Complete a smart assessment from mobile.
   - A survey can be completed either through the Employee Center or on the mobile app. For more information, see Complete a survey from the Employee Center.
10. Conduct the audit and gather evidence as part of the audit, for example, document assessments, interviews, and observations.

    a. In the **Audit questionnaires** tab, review the the smart assessment or survey responses that are submitted by the assigned user.
    When completed, the assessment results are available in the **Audit questionnaire results** tab.

    b. In the **Findings** tab, record findings for audit's items for review.
    For more information, see Add a finding for a review item in a safety audit.

    > **Note:** Safety auditors can also create actions and findings for specific questions while completing a smart assessment in the mobile app. When an agent creates an action for a question, the system also generates a related finding record based on the response. The finding then appears in this tab in the workspace. For more information, see Create actions and findings for the smart assessment questionnaire from mobile app.

    c. In the **Risk assessments** tab, select **New** to conduct a risk assessment as part of this audit.
    - Alternatively, select **Add** to associate an existing risk assessment to the audit record.
    - For more information, see Conduct a safety risk assessment.

    d. In the **Audit actions** tab, create and assign any actions based on findings and recommendations.
    For more information, see Add an action for a safety audit.

    > **Note:** Any actions created for specific questions while completing the smart assessment or survey in the Employee Center or mobile app also appear in this tab.

11. **Optional:** If needed, complete the audit surveys directly from the audit record in the workspace.

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a. Open the assessment to be completed.
   - For a smart assessment, select **Open audit smart assessment**.

     Note: Only a user with the **Assessment reader role** can access and complete this smart assessment. This role is set during the smart assessment template configuration. For more information, see Configure the smart assessment template for safety inspections and audits.

   - For an inspection survey, select **Open audit survey**.

b. Answer the survey questions and select **Submit**.

c. In the **State** field, select Closed Complete to close the audit survey.

12. In the **Overview** tab, review the audit progress and metrics.
    For more information, see Monitor safety audit progress and outcomes at a glance.
13. **Optional:** If necessary, submit the safety audit, findings, actions, or results for approval.
    For more information, see Submit a safety audit, finding, or action for approval.
14. In the **Results** tab, record the audit result and compare them with previous audits.
    For more information, see Record safety audit results.
15. **Optional:** In the **Details** tab, set the state to Closed Complete after all audit activities and objectives are complete, and then select **Save**.
    The audit moves to the Closed Complete state.

What to do next
If needed, generate a report for the safety audit.

1. Select **Generate report**.

   Note: The **Generate report** button appears only when the Audit [sn_hs_rm_audit] table is enabled for report field mapping. For more information, see Enable a Health and Safety table for configuring report field mapping.

2. In the **Generate report** dialog box, select a report mapping in the **Select report** field.

   Only the report mapping forms created and published for the Audit [sn_hs_rm_audit] table are available to select in the **Select report** field. For more information, see Create a safety report field mapping for generating reports.

3. Select **Generate**.

Add people involved in a safety audit

Add people involved to record all participants in a safety audit — their roles, responsibilities, and the objectives and actions assigned to them.

Before you begin
Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task
You should add people to this list before assigning objectives, because the **Assigned to** field on an objective is filtered to people already on this list.

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. In the **Audits** list, select **All** and select the audit into which you want to add audit participants.
4. Select the **People involved** tab and then select **New**.
5. In the **Name** field, select the user.
   - Only the employees of the organization (users in the [sys_user] table) are listed in this field.
   - The **Person type**, **Department**, **Phone**, and **Email** fields are auto-populated from the user's profile.
6. In the **Responsibility** field, select the person's role in the audit.
7. If this person is needed to approve findings, actions, or the audit itself, select the relevant approver options.
   - **Findings approver**, **Audit approver**, and **Results approver**: These approver fields are available only when the user has the [sn_hs_rm.safety_audit_writer] role.
   - **Actions approver**: This field is available only when the user has the [sn_ohs_im.action_writer] role.
8. In the **Description** field, record this person's specific responsibilities.
9. Select **Save**.
10. **Optional:** Add all people who are needed to participate in this audit.

Result

- The person is listed in the **People involved** tab of the audit and is available to select in the **Assigned to** field on any objectives in this audit.
- Depending on the configured approver option in step 7, the person is automatically added as an approver during the submission of findings, actions, or the audit for approval.

What to do next

To view a person's objectives and actions, open the person's record and then the **Objectives** and **Actions** tabs in it.

- The **Objectives** tab lists the objectives assigned to this person on this audit. You can create an objective assigned to this person directly from this list. For more information, see Define an objective for a safety audit.
- The **Actions** tab lists all actions on this audit assigned to this person. You can create an action directly from this list.

Define an objective for a safety audit

Define an objective to add detailed goal and scope of the safety audit. You can create as many objectives as the audit requires.

Before you begin

- People who should be assigned objectives are added to the audit's **People involved** list. The **Assigned to** field on an objective is filtered to people already added to the audit. For more information, see Add people involved in a safety audit.
- Any documents or standards to be cited are uploaded and accessible.

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

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About this task

Before an audit begins, define its scope by creating the audit objectives, the criteria used as benchmarks, and the items to be reviewed.

- An objective describes a specific area of focus for the audit. Each objective has a method (for example, interview, document review, or inspection), a due date, and can be assigned to a person involved in the audit.
- Criteria are the benchmarks or standards against which the audit measures compliance. Criteria are associated with one or more objectives.
- Items for review are the specific records, documents, or assessments that should be examined to meet an objective. Items for review are assigned to a person involved in the audit, who is responsible for conducting that part of the review and raise findings against them.

Note: If you have a previous audit with a similar scope, you can select **Import scope** to pre-populate the objectives and the related sections rather than entering them manually. For more information, see Import scope from an existing safety audit.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. In the **Audits** list, select **All** and open the audit record to add the objective to.
4. Select the **Objectives** tab and then select **New** in the Objectives section.
5. On the Objective form, fill in the fields.
   For information on field descriptions, see Audit Objective fields.
6. Add criteria to the audit objective.

   a. Expand the objective card to which you want to add criteria.

   b. In the **Criteria** section of the objective, select **New**.

   c. In the Add Criteria dialog box, fill in the fields.

Add Criteria fields

Field	Description
Criteria type	Type of criteria. ▪ **Regulatory list**: A regulatory or standards list. ▪ **Authority document**: An Integrated Risk Management (IRM) authority document. **Note:** This option is available only when Integrated Risk Management (IRM) is installed. ▪ **H&S Document**: A document from the Health and Safety document library.

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Field	Description
	▪ **Knowledge base article**: A knowledge base article, for example, for company's Health and Safety procedures. ▪ **Text**: Free text description of the criteria.
Criteria	Standards that the audit measures compliance against. The items in this list appear based on the selected **Criteria type** and the available record of that type. **Note:** If you use the 3E integration (for example, with Health and Safety Environmental Management), regulatory lists can be populated automatically from 3E when Regulatory list is selected as **Criteria type**.
Title	Label that identifies the text-based criterion. This field appears only when **Text** is selected from **Criteria**.
Objectives	Objectives associated with this criterion. You can link this criterion to multiple objectives on this audit.
Description	Additional context for the criterion.

d. Select **Add**.

e. Optional: If necessary, add more criteria to the objective.

7. Adding items for review to the audit objective.

a. Expand the objective card to which you want to add an item for review.

b. In the **Items for review** section of the objective, select **New**.

c. In the Add Item for review dialog box, fill in the fields.

Add Item for review fields

Field	Description
Item type	Type of item, such as a Health and Safety record type, to be reviewed.
Item for review	Record to be reviewed for this audit. The items in this list appear based on the selected **Item type**.

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Field	Description
Priority	Priority level to review this item.
Assigned to	User assigned to this item for review. Only the people added to the **People involved** list of this audit are available in this field. For more information, see Add people involved in a safety audit.
Objectives	Objectives associated with this item for review. You can link this item to additional objectives on this audit.
Criteria	Criteria associated with this item for review. You can link this item to multiple criteria on this audit.
Instructions	Guidance for the person assigned to this item, describing what to review or verify during the audit.

   d. Select **Add**.

   e. **Optional:** If necessary, add more items for review to the objective.

8. Select **Save objective**.
9. **Optional:** If necessary, add more objectives for the audit.

Result

- Each objective defined for the audit appears as a collapsible card on the **Objectives** tab. The card header shows the objective name, priority, and state.
- The objective is also listed in the **Objectives** tab of the assigned person's record on this audit.

What to do next

People assigned to the audit objectives can raise findings against the items for review during the audit. You can create a finding from the audit's **Findings** tab or directly from within an item for review. For more information, see Add a finding for a safety audit.

Import scope from an existing safety audit

Import scope to copy the audit details, people involved, and objectives (including criteria and items for review) from an existing audit.

Before you begin

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

Importing scope from a previous audit lets you get the new safety audit up and running quickly without re-entering all the scope information.

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. In the **Audits** list, select **All** and open the audit into which you want to import the scope.
4. Select **Import scope**.
5. In the **Previous audit** field, search for and select the audit to copy from.
   The current audit is excluded from this list.
6. Select **Import**.

Result

The following information is copied from the selected audit to the current audit:

- All fields on the Details tab.
- All People involved records, except their associated actions.
- All Objectives, Criteria, and Items for review, with the relationships between them preserved.

What to do next

After importing, review all copied fields before saving. In particular, update the audit dates, locations, and assigned person as these values typically differ for the new audit period.

Add a finding for a review item in a safety audit

Record a finding for a review item during an audit and perform a root cause analysis (RCA) for it.

Before you begin

The audit must have at least one item for review on the **Objectives** tab.

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

A finding can cite the specific criterion the item relates to, including a precise clause, section, or regulation from the cited source.

Safety auditors create actions for specific questions while completing a smart assessment from the mobile app. When they create an action for a question, the system also generates a related finding record based on the response. For more information, see Create actions and findings for the smart assessment questionnaire from mobile app.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. In the **Audits** list, select **All** and select an audit record to add a finding to.
4. Create a finding from the **Findings** tab or directly from within an item for review.

Option	Steps
From the Findings tab	In the **Findings** tab of the audit, select **New**.

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Option	Steps
From within an item for review	**a.** Select the **Objectives** tab. **b.** Expand the objective card that contains the item you want to raise a finding for. **c.** Select the specific item for review. **d.** In the item's **Findings** tab, select **New**.

5. On the form, fill in the fields.
   For field descriptions, see Finding form for safety audits.
6. Select **Save**.
   The **5Whys RCA**, **ICAM RCA**, **Actions**, **Approvers** tabs appear.
7. **Optional:** In the **5Whys RCA** tab, select **New** to perform an RCA using the Five whys technique of root cause analysis.
   a. In the **Problem** field, enter the problem statement.
   b. To identify the precise one underlying reason, ask why to each of the subsequent responses and enter in **Why?** fields.
   c. In the **Root cause** field, enter the answer to the last Why.
   d. Select **Save**.
8. **Optional:** In the **ICAM RCA** tab, select **New** to perform an RCA using the ICAM (Incident Cause Analysis Method) root cause analysis technique.
   a. Using the form's questions, determine the contributing factors to the finding.
   b. In the **Key learnings (Identify the root cause)** field, identify the underlying root causes that led to the finding.
9. **Optional:** If necessary, add more findings for the item for review.

What to do next

- In the **Actions** tab of the finding, add actions to ensure that any issues are prevented or corrected. For more information, see Add an action for a safety inspection or audit.
- If needed, submit the finding and its associated actions for approval and start the approval workflow. For more information, see Submit a safety audit, finding, or action for approval.

> **Note:** Before you can submit a finding or action for approval, at least one person must be added to the **People involved** list with the appropriate approver options selected. For more information, see Add people involved in a safety audit.

Monitor safety audit progress and outcomes at a glance

Use the **Overview** tab in a Health and Safety audit to quickly assess the audit completion status and outstanding items.

Before you begin

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

The **Overview** tab provides a quick and real-time visual summary of audit progress. It shows objective completion on a timeline, the distribution of objectives, items for review, and findings by state, and an overall compliance rating for the audit.

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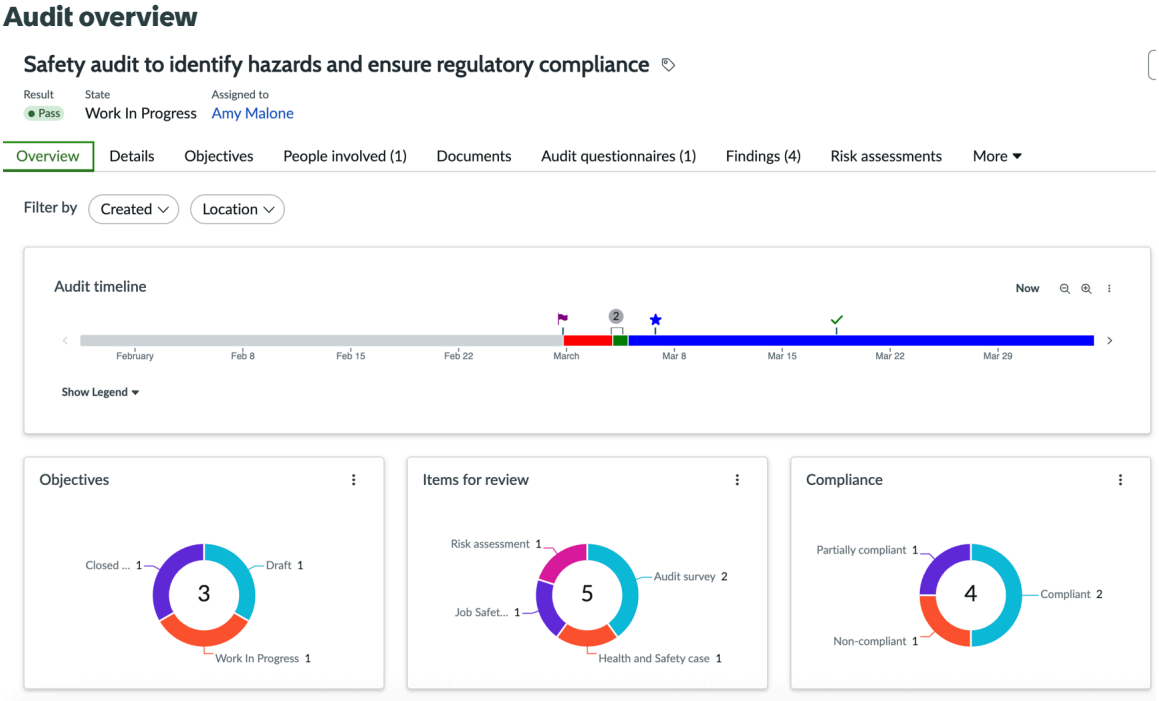

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. In the **Audits** list, select **All** and open the audit record.
4. Select the **Overview** tab.

   The tab displays cards that summarize the audit status.
5. **Optional:** Apply the **Date range** and **Location** filters to refine the data shown on cards. Filters apply to all cards simultaneously.
6. Review the audit progress and metrics using the following data visualizations.

Data visualizations

Card	Description
Audit timeline	Audit timeline that runs from the audit start date to the audit end date. Audit objectives are distributed across this audit period and appear as icons on the timeline: ○ Select **Show legend** to understand timeline indicators. ○ Select an indicator icon on the timeline to open the corresponding objective record.
Objectives	Breakdown of objectives by state.

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Card	Description
	○ The number inside the donut chart shows the total objective count. ○ Select a segment to drill down to a list of objectives filtered by that state.
Items for review	Breakdown of review items by type. ○ The number inside the chart shows the total count. ○ Select a segment to drill down to a filtered list of items in that type.
Compliance	Percentage of audit compliance ratings based on findings. ○ The percentage inside the chart shows the overall compliance rating for the audit. ○ Select a compliance rating to drill down to a list of findings filtered by that rating.

Submit a safety audit, finding, or action for approval

When completed, submit the safety audit, finding, or action for approval and start the approval workflow.

Before you begin

Before you can submit for approval, you must add at least one person to the **People involved** list and select the appropriate approver option.

- **Findings approver** to approve audit findings
- **Actions approver** to approve audit actions
- **Audit approver** or **Results approver** to approve the safety audit

For more information, see Add people involved in a safety audit.

Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

States of a record when submitted for approval:

Approval states

State	Description
Pending approval	Record has been submitted and is awaiting a response from all approvers.
Approved	All approvers have approved the record.
Rejected	At least one approver has rejected the record.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().

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3. In the **Audits** list, select **All**.
4. Submit an audit for approval.
   a. Select the audit that you want to submit.
   b. Ensure that all changes are saved and select **Submit for approval**.
      This button is available only when the audit state is New or Work In Progress.
      All people involved who are marked as **Audit approver** or **Results approver** receive an approval request.
5. Submit a finding for approval.
   a. Select the required audit.
   b. In the **Findings** tab, select a finding you want to submit.
      Alternatively, open a finding from the **Findings** tab within an item for review.
   c. Select **Submit for approval**.
      People involved in this audit who are marked as **Findings approver** receive an approval request.
6. Submit an action for approval.
   a. Select the required audit.
   b. In the **Actions** tab, open an action you want to submit.
   c. Select **Submit for approval**.
      People involved in this audit who are marked as **Actions approver** receive an approval request.

Result

- The submitted audit, finding, or action's state changes to Pending approval.
- The approvers are listed in the **Approvers** tab of the record.
- All approvers receive an approval request for the submitted record.

What to do next

The approvers can respond to the submitted record from the Employee Center.

- When all approvers respond, the state of the submitted record updates to Approved or Rejected and the **Close audit** button appears for it.
- Select **Close audit** to complete and close the audit. If all objectives in this audit are complete, the audit moves to the Closed complete state.

Record safety audit results and compare with previous audits

Record the audit result and outcomes and compare them with previous audits to identify trends and track progress over time.

Before you begin

To compare results with previous audits, the current audit must belong to an audit schedule that has at least one completed predecessor audit.

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Role required: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

The **Results** tab brings together the outcome and all associated records for an audit in a single view. Use it to record the audit result, review findings, observations, actions, and risk assessments. And if this audit is part of a recurring schedule, you can also bring in records from previous audits in the same schedule to compare results over time.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. In the **Audits** list, select **All** and select the audit.
4. Select the **Results** tab.
5. In the **Audit result** card, select the result and enter any final remarks.
6. Review findings, observations, and, actions, risk assessments for the audit in their respective cards.
   Each card lists the records associated with the current audit.
7. Select **Save**.
8. Compare the current and previous audit results.

   a. Select **Compare previous audits**.
   This button appears only when this audit belongs to an audit schedule.

   b. In the **Select audits to compare** dialog box, select one or more previous audits from the current schedule.
      - You can select multiple audits to compare across several iterations at once.
      - Only the completed predecessor audits from the audit schedule appear in this list to compare.

   c. Select **Select**.
   The records from all selected previous audits are added to the four record cards alongside the current audit's records.

   d. **Optional:** To filter the results, for example, by date range or location, use the filter controls in the cards.

Result

- The audit result is recorded and all related records are visible in a single view.
- If a comparison was applied, you can see how findings, observations, actions, and risk assessments have changed across audit iterations. For example, a finding that was non-compliant in a previous audit may now appear as compliant, confirming that the issue was resolved.

Complete a safety inspection or audit survey through Employee Center

Complete a safety inspection or audit survey assigned to you through the Employee Center.

Before you begin

Role required: none

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About this task

- You can also take an inspection or audit survey on the mobile app using the **My Assessments and Surveys** applet launcher. For more information, see Surveys in the mobile app.
- For information on how an admin configures which survey field type should display the **Create action** check box, see Configure the create action check box for safety inspection survey in the Mobile Agent app
- You can complete an inspection or audit survey offline as well through the Mobile Agent app. Surveys completed offline are synchronized once an internet connection is established. For more information, see Complete a safety inspection or audit survey in the offline mode.
- An inspection or audit manager can also complete a survey from the Health and Safety Workspace by selecting **Open inspection survey** in the inspection record or **Open audit survey** in the audit record.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, select **Surveys** under **My active items**.
3. In **My Assessments and Surveys**, select the survey that you want to take.
4. Conduct a safety walk for the inspection or audit and fill in the survey.
5. **Optional:** Create any actions on the go related to specific questions in the inspection or audit.
6. Select **Submit**.

Result

- The survey results are linked back to the inspection or audit record that it was initiated from. The completed survey is available on the Health and Safety Workspace at the following places:
  - **Inspection survey results** tab of the inspection.
  - **Audit survey results** tab of the audit survey in an audit.
- Any actions created for questions while completing the survey appear in the following tabs on the workspace:
  - **Inspection actions** tab of the inspection.
  - **Audit actions** tab of the audit survey in an audit.

Add a finding and root cause analysis for a safety inspection

Record a finding based on the survey results for a safety inspection and perform a root cause analysis (RCA) for it.

Before you begin

Role required: sn_hs_rm.safety_inspection_manager or sn_hs_rm.safety_inspection_writer

About this task

Inspection agents can also create actions for specific questions while completing a smart assessment or survey from the mobile app. When an agent creates an action for a question, the system also generates a related finding record based on the response. For more information, see the following:

- Create actions and findings for the smart assessment questionnaire from mobile app.
- Create actions and findings for survey responses from mobile app.

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. In the **Inspections** list, select **All** and open an inspection record to add a finding.
4. In the **Findings and RCA** tab, select **New**.
   Any findings created for specific questions while completing the smart assessment or survey through the mobile app also appear in this tab.
5. On the form, fill in the fields.
   a. In the **Hazard** field, select a risk for the finding to define the risk present.
   b. In the **Potential consequence** and **Potential likelihood** fields, define a consequence and likelihood of the finding to understand its impact.
   c. In the **Incident** field, select the related safety incident, if an incident is caused by this finding.
6. Select **Save**.
   The **5Whys RCA** and **ICAM RCA** tabs appear.
7. **Optional:** In the **5Whys RCA** tab, select **New** to perform an RCA using the Five whys technique of root cause analysis.
   a. In the **Problem** field, enter the problem statement.
   b. To identify the precise one underlying reason, ask why to each of the subsequent responses and enter in **Why?** fields.
   c. In the **Root cause** field, enter the answer to the last Why.
   d. Select **Save**.
8. **Optional:** In the **ICAM RCA** tab, select **New** to perform an RCA using the ICAM (Incident Cause Analysis Method) root cause analysis technique.
   a. Using the form's questions, determine the contributing factors to the finding.
   b. In the **Key learnings (Identify the root cause)** field, identify the underlying root causes that led to the finding.
9. **Optional:** If necessary, add more findings for the safety inspection.

What to do next

Add actions for each finding to ensure that any issues are prevented or corrected. For more information, see Add an action for a safety inspection or audit.

Add an action for a safety inspection or audit

Add an action for each finding to address any issues or implement measures necessary to improve workplace safety. You can add multiple actions for an inspection or audit finding.

Before you begin

Role required:

- For safety inspections: sn_hs_rm.safety_inspection_manager or sn_hs_rm.safety_inspection_writer
- For safety audits: sn_hs_rm.safety_audit_manager or sn_hs_rm.safety_audit_writer

About this task

Inspection and audit agents can also create actions for specific questions while completing a smart assessment or survey from the mobile app. When an agent creates an action for a

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question, the system also generates a related finding record based on the response. For more information, see the following:

- Create actions and findings for the smart assessment questionnaire from mobile app.
- Create actions and findings for survey responses from mobile app.

For information on adding an action for a safety inspection or audit through Mobile Agent, see Add actions in mobile app.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Create an action from an inspection or audit record or the Actions list.

Option	Steps
From an inspection record	**a.** Select the **Inspections** list and then **All**. **b.** In the list, open an inspection record to add the action to. **c.** In the **Inspection actions** tab, select **New**.
From an audit record	**a.** Select the **Audits** list and then **All**. **b.** In the list, open an audit record to add the action to. **c.** In the **Audit actions** tab, select **New**.
From the Findings tab	**a.** Select the **Findings** tab for an audit or in spection. **b.** Select the **Actions** tab in the finding. **c.** Select **New**.

Note: Any actions created for specific questions while completing the smart assessment or survey through the mobile app also appear in this tab.

4. On the form, fill in the fields.
   For information on field descriptions, see Health and Safety action form.
5. Select **Save**.
6. **Optional:** If necessary, add more actions.

Result

- If associated with a safety inspection, the action appears in the **Inspection actions** tab of the inspection.
- If associated with a safety audit, the action appears in the **Audit actions** tab of the audit.
- The action also appears in the assigned user's **My Tasks** list on both the Employee Center and the Now Mobile app. From either location, the user can respond to the action and update its status.

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What to do next

- You can assign the action to yourself or to another safety team member to start working on it.

  If it is an audit action, you can submit it for approval to start the approval workflow. For more information, see Submit a safety action for approval.

- You can share the action, independent of the inspection or audit, with other groups or agents, so that they can prevent the similar situation from happening at any of their locations. To share an action, select **Copy action**.
  - The action is duplicated and appears in the **My Tasks** list of the assigned user on the Employee Center.
  - The action is also listed in the **Actions** list on the Health and Safety Workspace.

Add an action from survey response in safety inspection through Employee center

Learn to add actions to the survey responses on a safety inspection or audit survey to access safety issues discovered during a safety walk.

Before you begin

Role required: sn_hs_rm.safety_inspection_writer

About this task

The safety agent assigned to the survey can create actions on the survey. The actions must first be added to the findings related item of a safety inspection record. For information on adding action to findings, see Add an action for a safety inspection or audit. Actions can also be created on the Now Agent app in offline mode provided all the inspection records are cached before going offline. For more information, see Add actions for safety inspections survey in Mobile Agent app.

Procedure

1. Navigate to **Employee Center** > *Health and Safety* and select the **View safety inspections** quick link.
2. Select **Open Survey** for one of the inspection record.
   - A survey widget with a **Get started** button appears.
   - An **Action** widget appears with the list of available actions in findings related item of a safety inspection record.
3. Select the **Get started** button on the survey widget.
   The survey contains sections, and each section includes questions. When the response is added for the questions in the first section, it's available in the **Action** widget to create an action for.
4. Respond to the questions on the survey and then select the **Create action** button in the **Action** widget.
   Action can be created for each question in all the sections.
5. On the **Create action form**, fill in the fields.

Create action form

Field	Description
Section	The sections of the survey that you have added response for.

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Field	Description
Question	The questions that you responded to in the selected section of the survey

For more information to complete the action form, see Health and Safety action form.

6. Select **Create**.
   - A new action is created and can be viewed in the action widget next to the survey.
   - Select more actions Icon to edit or delete the actions on the action widget.
7. Select **Submit**.

Assign safety inspection to agents

Multiple safety agents can be assigned to the same inspection record to enable a collaborative effort. While only one agent can be assigned at a time to a survey related to an inspection record, it allows clear ownership and maintains overall team coordination. This collaboration can be achieved from both Employee center and Health and Safety Workspace.

Before you begin

Role required: sn_hs_rm.safety_inspection_manager or sn_hs_rm.safety_inspection_writer or sn_hs_rm.safety_inspection_agent

About this task

The safety inspection quick link in the Employee center lists the safety inspections assigned to you or any of the assignment groups you're a part of. This functionality is also available on the Mobile Agent app in offline mode provided all the inspection records are cached before going offline.

Procedure

1. From Employee Center,
   a. Navigate to *Health and Safety* and select the **View safety inspections** quick link.
   b. Select **Assign to me** for the required safety inspection record.
   The safety inspection with the related surveys is assigned to you.
   c. **Optional:** Select **Open Survey** and complete the survey.
2. From Workspace,
   a. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
   b. Select the risk management icon ( ).
   c. Select the **Inspections** list and then select **All**.
   d. Open the required inspection record and select the **Assign to me** button on the **Details** related list.
   The safety inspection with the related surveys is assigned to you.
   e. **Optional:** Select the **Open inspection survey** button to complete the survey as needed.

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3. From the Mobile Agent app,
   a. Tap **Home** in the navigation bar.
   b. Select **My inspections** from the quick links to open a list of inspections.
   c. Select the inspection record and then select **Assign to me**.
   d. Select **Yes** in the confirmation modal.

Result
The safety inspection record and the related survey are assigned to the safety agent even if the survey is in progress.

Note: When the survey is assigned to a different agent, any progress made on the survey does not transfer to the new agent. The new agent assigned to the survey must review and, if necessary, start the survey from the beginning, as partially completed surveys are not carried over.

Safety registers

Safety Registers help safety teams and line managers to keep track of hazardous materials like chemicals and asbestos, as well as attach Safety Data Sheets (SDSs) that employees can easily access.

- Safety team manages safety registers like chemicals and asbestos in the Health and Safety Workspace. The safety team also attaches Safety Data Sheets (SDSs) to safety register records.
- Employees can search and access these SDSs in the Employee Center or on Now Mobile app.

Manage your safety registers

Manage your safety registers to log and keep track of the hazardous materials used in your organization, along with Safety Data Sheets (SDSs).

Before you begin
Role required: sn_hs_rm.safety_register_manager

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the configuration icon ().
3. In the **Configuration** tab, select **Safety Registers** and then the required register.
   - For chemicals, select **Chemicals** and then **All**.
   - For asbestos, select **Asbestos** and then **All**.
   - For any other hazardous material, select **Other** and then **All**.
4. Create a safety register or modify an existing one.
   - To create a register, select **New**.
   - To review an existing one, open the one that you want to update.
5. On the form, fill in the fields.
6. In the **Safety data sheet** field, select **Attach File** to attach documents, for example, a Safety Data Sheet (SDS) for this material.
7. Select **Save**.
8. Add safety registers for all hazardous materials used in your organization.

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Result
Depending on the selected register type, the safety register is available in the Chemical, Asbestos, or Other register under the **Safety Registers** list.

What to do next
Employees can access the attached safety register document, such as SDS, through the Employee Center. For more information, see Access a safety register document in Employee center.

Access a safety register document in Employee center

Access and view safety register documents for chemicals and asbestos through the Employee Center.

Before you begin
Role required: none

About this task
All Safety Data Sheets (SDSs) that are added to the safety registers through the Health and Safety Workspace are available to view in the Employee Center or on Now Mobile app. Employees can access these SDSs for their safety when working with any potentially hazardous materials. For more information on safety registers, see Manage your safety registers.

For information on viewing these SDSs through Now Mobile app, see View a safety register document in the Now Mobile app.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center, select the **Health and Safety** menu.
3. Under **Quick links**, select **View safety register documents**.
4. In the list, select the chemical to view its SDS.

   Tip: You can narrow down the list using the filters with the list. You can also search the required SDS using the search field available with the list.

5. **Optional:** If needed, you can download the Safety Data Sheet.

Safety exposure management

With exposure management, safety team and industrial hygienists can manage exposures and exposure assessments so they can control any harmful effects on workers.

What is an exposure

An exposure refers to a situation or activity that has the potential to harm a person if they are in the vicinity. The severity of the harm depends on factors such as the duration of exposure and the level of the exposure. For example, loud noise can be considered an exposure, and the noise level (decibels) and length of time a person is exposed to it are important factors in assessing this exposure.

There are various standard categories of exposures, for example:

- Noise
- Chemical
- Environmental

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- Physical
- Mechanical
- Ergonomic

Key features of exposure management

Safety exposure management provides the following capabilities:

- Define exposure types on the exposure list and associate risk assessments and records from the safety register.
- Perform exposure assessments that can create multiple exposure records (using a condition builder) for people affected across different locations.
- Assign follow-up actions so that the exposures are controlled, and workers are protected.

Define an exposure type

Identify and define a potential workplace exposure type present in a location in your organization. Maintain a list of all exposures types across your organization.

Before you begin

Role required: sn_hs_rm.industrial_hygienist or sn_hs_rm.exposure_writer

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Exposure types** list and then **All**.
4. Create an exposure or modify an existing one.
   - To create an exposure, select **New**.
   - To review an existing exposure, open the one that you want to modify.
5. On the form, fill in the fields.

Exposure type

Field	Description
Number	System-generated unique number for the exposure type.
Location	Location where this exposure and the associated risks exists.
State	State of the exposure type. ○ **Draft**: Select to configure the exposure type. ○ **Active**: Select to mark this exposure type available for use. An exposure type must be active to be used. The **Create exposure assessment** button for this exposure type appears when its state is set as active. ○ **Inactive**: Select to mark this exposure type as unavailable for use. ○ **Obsolete**: Select if this exposure type no longer exists.
Exposure category	Category for the exposure.

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Field	Description
	The list in this field displays items from the choices defined for the `Exposure category` column in the Exposure type [sn_hs_rm_exposure_type] table.
Exposure sub-category	Subcategory for the exposure. This field appears only when a category is selected from **Exposure category** and subcategories are available for the selected category. The subcategory choices for a category are defined in the `Exposure sub-category` column of the Exposure type [sn_hs_rm_exposure_type] table. For more information, see Define a category for an exposure type.
Safety register	Safety register relevant to this exposure type. For example, if it's a chemical exposure, add a link it to corresponding safety register and the associated chemical safety data sheet.
Risk assessment	Risk assessment associated with this exposure type.

6. Select **Save**.
7. Add all exposure types that are present for a location.
8. Select **Save**.
   The **Exposure assessments** tab appears for this exposure type.

Result
The exposure type is listed in the **Exposure types** list and is saved in the Exposure type [sn_hs_rm_exposure_type] table.

What to do next
1. Create exposure assessment records for all locations in your organization that this exposure type applies to. For more information, see Create an exposure assessment for an exposure type.
2. Perform exposure assessments across different locations for this exposure type. For more information, see Perform an exposure assessment for a location.

Create an exposure assessment for an exposure type

For an exposure type, create an exposure assessment for a site location. You can also generate exposure assessments for multiple locations in your organization at once for an exposure type.

Before you begin
Role required: sn_hs_rm.industrial_hygienist or sn_hs_rm.exposure_writer

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Exposure types** list and open the exposure type to create the assessment for.
4. In the **Details** tab, set the **State** as Active.
5. Select **Create exposure assessment**.

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6. In the **Selected locations where this exposure is present** field, select the location to be assessed for this exposure type.
   You can select multiple locations to create exposure assessment records for all of them at once. However, each selected location must be unique, as only one active exposure assessment record can be associated with each location.
7. Select **Create**.

Result
An exposure assessment record for each selected location appears in the **Exposure assessment** tab of the exposure type.

What to do next
In the **Exposure assessments** tab, perform assessments across different locations for this exposure type. For more information, see Perform an exposure assessment for a location.

Perform an exposure assessment for a location

Perform an exposure assessment for an exposure type for each site location in your organization.

Before you begin
Role required: sn_hs_rm.industrial_hygienist or sn_hs_rm.exposure_writer

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Exposure types** list and open the exposure type to perform the assessment for.
4. In the **Exposure assessment** tab, select the record for the location that you want to perform the exposure assessment for.
5. In the **Exposure creation conditions** field, add conditions to create exposure records for this assessment.
   The criteria defined in this field—particularly the measurement limit—trigger the creation of exposure records under the **Exposures** tab for this assessment. An exposure assessment might generate multiple exposures over time whenever the measurement limits exceed the defined criteria.

   a. Select **Set conditions**.

   b. In the condition builder, add criteria (including the measurement condition) and select **Set**.
   For example, the following image shows the measurement condition for noise exposure limits.

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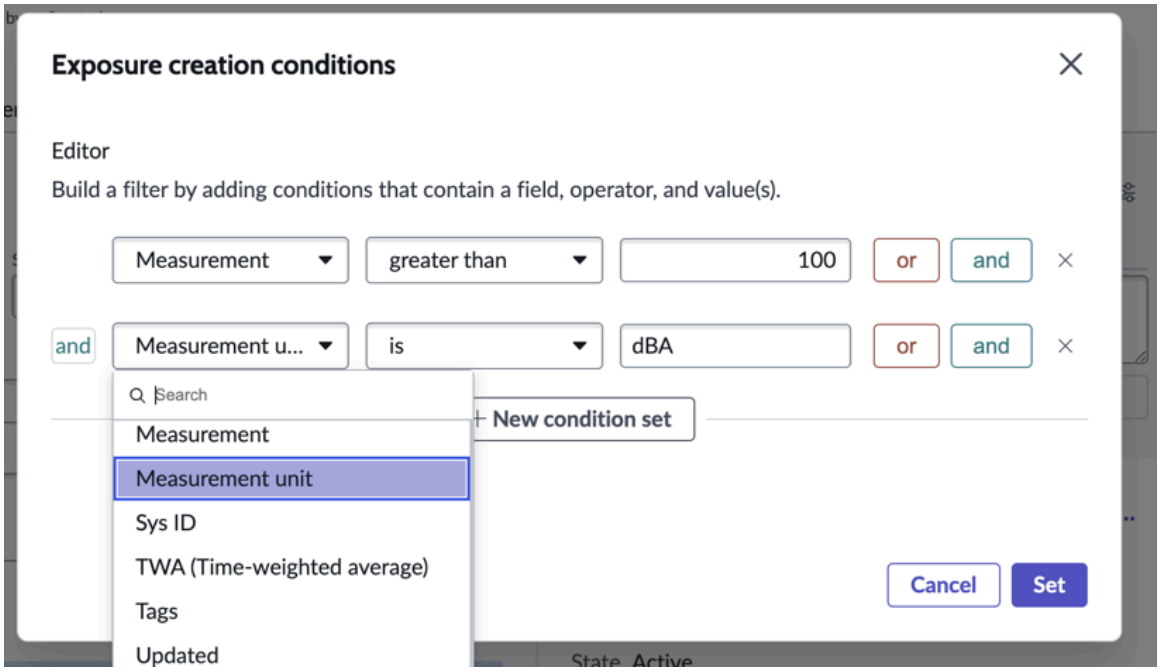

Note: The measurement condition will only apply when a measurement record is created in the **Measurements** tab.

6. In the **Affected people conditions** field, add conditions to see all the people affected from an exposure.
   This criteria is based on the Health and Safety profile [sn_ohs_im_health_and_safety_profile] table. It automatically adds or updates the affected people in the exposure records generated for this assessment.

   a. Select **Set conditions**.

   b. In the condition builder, define the conditions to identify people affected, and select **Set**. You can choose fields from the Health and Safety profile table and dot-walk fields when selecting a field in the condition builder. For example, the following image shows the

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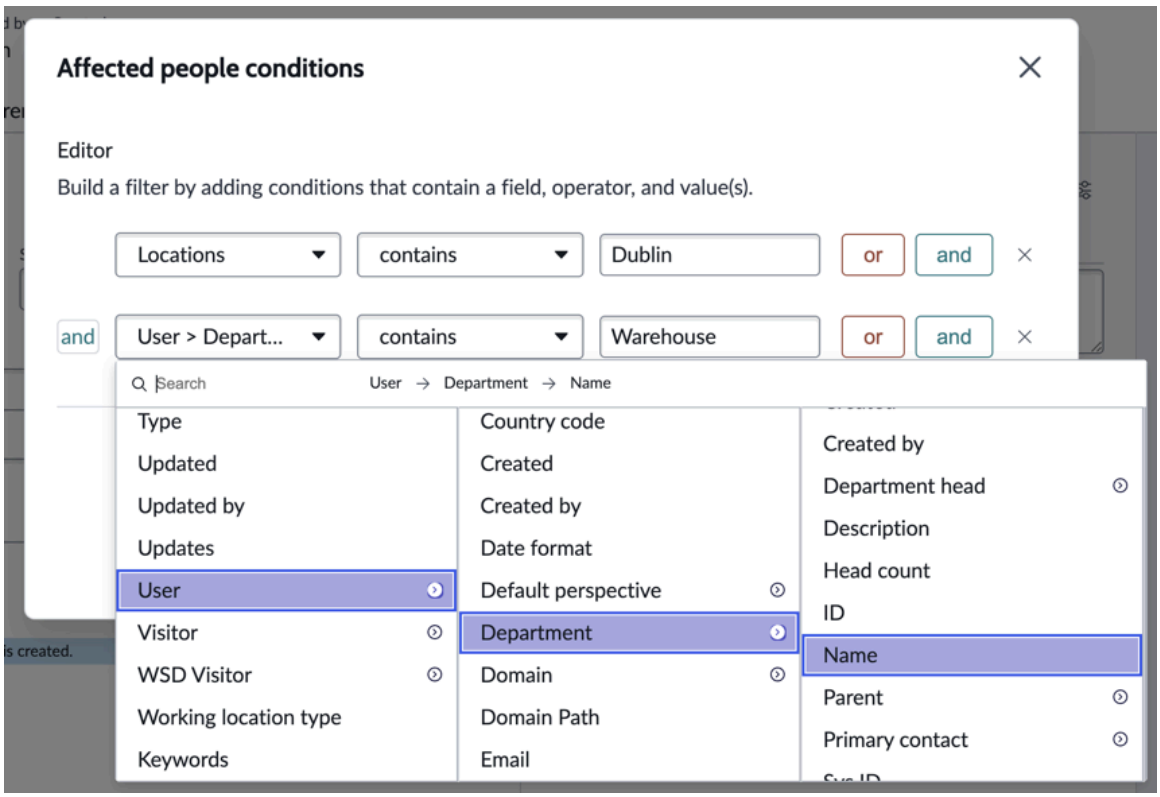
conditions to identify people in the Warehouse department in Dublin who are affected by this exposure.



7. In the **Action schedule** tab, set up actions for the affected people.
   The action schedule creates and auto-assigns an action for each affected person when there's an active exposure for this assessment. For more information, see Define an action schedule for affected people.
8. In the **Documents** tab, add any documents related to this assessment.
   - Select **Add** to link an existing document stored in the **Health and Safety document library** list.
   - Select **New** to upload a new document.

   For information on storing documents in the Health and Safety Workspace, see Add a new Health and Safety related document.
9. In the **Details** tab of the assessment, set the **State** as Active.
10. Select **Save**.
11. In the **Measurements** tab, add the exposure measurement value and the source of the exposure.
    For information on adding a measurement and creation of an exposure from it, see Add a measurement and exposure source for an exposure assessment.

Result

- Based on the exposure creation conditions, affected people conditions, and the measurement value, the following records are created:
  - An exposure is created and listed in the **Exposures** tab of the assessment.
  - The affected people are added to the **Affected people** tab of the generated exposure record.
  - The action scheduler runs for the active exposure and assigns actions to exposed people. The actions for each affected person are listed in the **Actions** tab under the action schedule.

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- If an active exposure is manually added to a Health and Safety user's profile, the user is also listed in the **Affected people** tab of the exposure record.
- Any assigned actions appear in the affected people's **My Tasks** list in the Employee Center.

Define an action schedule for affected people

Define an action schedule for the people affected by an exposure. The action schedule creates an action for each affected person when there's an active exposure for an exposure assessment.

Before you begin
Role required: sn_hs_rm.industrial_hygienist or sn_hs_rm.exposure_writer

About this task
The scheduler only runs when there are active exposures so that the actions are assigned to the actively exposed people.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Exposure types** list, open the exposure type, and select the exposure assessment record that you want to add the measurement to.
4. In the **Action schedule** tab, select **New**.
5. On the form, fill in the fields.

   For information on field descriptions, see Action schedule form for an exposure.
6. Select **Save**.

Result

- The **Actions** tab appears for the action schedule.
- An action record is created in the **Actions** tab for each affected person whenever there's an active exposure for the exposure assessment. An action schedule might generate multiple actions for the affected people over time.

Add a measurement and exposure source for an exposure assessment

Add a measurement recorded for the exposure type when performing an exposure assessment.

Before you begin
Role required: sn_hs_rm.industrial_hygienist or sn_hs_rm.exposure_writer

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ().
3. Select the **Exposure types** list, open the exposure type, and select the exposure assessment record that you want to add the measurement to.
4. In the **Measurements** tab, select **New**.
5. On the form, fill in the fields.

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Measurement form

Field	Description
Date and time of measurement	Date and time when this measurement is recorded.
Measurement unit	Unit of measurement for this exposure type. The list shows units based on the exposure category selected in the exposure type. The unit choices for an exposure category are defined in the `Measurement unit` column of the Measurement [sn_hs_rm_measurement] table. For more information, see Define a category and measurement unit for an exposure type.
Measurement	Measurement value recorded for the exposure.
TWA (Time-weighted average)	Time-weighted average for the exposure.
Description	Detailed information about this measurement.

6. Select **Save**.
   The **Exposure sources** tab appears.
7. **Optional:** In the **Exposure sources** tab, select **New** to add the source of this exposure.
   You can add multiple exposure sources, if relevant.
8. Select **Save**.

Result

- The measurement value is listed in the **Measurements** tab of the exposure assessment.
- The source of the exposure type is listed in the **Exposure sources** tab of the measurement record.
- Based on the measurement limit defined in the exposure creation condition, the measurement can trigger an exposure record in the **Exposures** tab in these ways:
  - If the measurement value exceeds the limit, an exposure record is created in the **Exposures** tab. The people affected by this exposure are added in the **Affected people** tab of the generated exposure.

    However, if an active exposure exists for this measurement, no new exposure record is created.
  - If the measurement is below the limit and an active exposure exists for this assessment, the exposure end date is automatically set to the measurement date. It's because the exposure no longer meets the criteria, making it irrelevant. Additionally, the exposure's state is updated to obsolete and the associated action schedule for the exposure is marked as inactive.

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Permit-to-work system

The permit-to-work system streamlines the management of requests for work permits for potentially hazardous activities and provides an efficient process for issuing these permits.

The permit-to-work system provides a process for workers to submit a permit-to-work request for hazardous activities, receive formal approval, and be issued a permit. A permit is issued after the safety of the job and the site is validated. Potentially hazardous activities might include:

- Hot work
- Confined space entry
- Electrical work
- Excavation
- Lifting operations
- Chemical handling
- Working at heights
- Working underwater

Not managing these tasks properly could pose significant risks. The permit-to-work system enhances operational efficiency and promotes the following outcomes:

- Safety of workers by identifying hazards and executing risk control measures.
- Accountability by providing a clear trail of documentation when needed for auditing an incident or for legal conformance.
- Adequate training for workers on risks, safety measures, and permit requirements.
- Regular monitoring and supervision on safety conformance and permit conditions throughout the duration of the activity.

Create a permit-to-work request

The permit-to-work request is submitted by the worker who will be carrying out a job with significant risk.

Before you begin

Role required: sn_hs_rm.permit_requestor

Procedure

1. Navigate to **All** > **Self service** > **Employee Center** and then select **Permit to work**.
2. Select the **Request a permit to work** card or select the quick link to request a permit-to-work.
3. On the Request a permit to work form, fill in the fields.
   For a description of the field values, see Permit-to-work request form.
4. Read the text in the **Acknowledgement Message** field and select the **Acknowledge** check box.
5. Select **Submit**.
6. In the Employee Center, select **My requests** to open the permit.
7. Select the checklist tab of the permit request and complete the checklist as applicable to the task.
   The checklists are also displayed under the **Open** tab of **My tasks.**
8. Select **Save** to save changes.
9. **Optional:** The checklist can be edited if necessary.

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10. Select **Mark Complete** when the checklist items are completed.

    Note: The checklist can't be edited after it's marked complete.

11. From **Actions**:
    - Select **Print permit** to print the permit request.
    - Select **Print checklist** to print the completed checklist.

    Note: The printed permit and checklist can be signed and attached in the attachment tab for this permit. The attached documents can be viewed in the activity stream.

Approve or reject a permit-to-work request

Review the permit and approve or reject it through Employee Center.

Before you begin
Role required: sn_hs_rm.permit_approver

About this task
After assessing the risks associated with the job and checking whether safety parameters are in place, the approver can approve or reject the request.

Procedure
1. Navigate to **All** > **Self service** > **Employee center**.
2. Select **My tasks** to view the permit approvals under the **Open** tab.
3. Select the permit link.
4. Review the permit details.
5. In the comments field of the approve request, add comments and select the **Approve** or the **Reject** button as applicable for the permit request.

Result
The permit is approved or rejected in the system and the permit requestor can view the response from the Employee Center under **My Tasks**.

Issue a permit to work

A permit coordinator can issue a permit after the permit approver approves a request.

Before you begin
Role required: sn_hs_rm.permit_coordinator

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. In the **Permit to work** list, select **All** and then select a permit to review.
4. Review the safety requirements.
   As part of the review, the permit coordinator can do the following:
   - Create a Health and Safety action
   - Review the approvers
   - Review the checklist

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5. **Optional:** Research content related to the permit by selecting the Agent assist icon ( ). Agent assist searches the knowledge base using the text from the permit's **Short description** field and shows relevant articles.
6. Select **Issue permit**.

Result
The permit status changes to active and the permit requestor can print the permit through the Employee Center.

What to do next
Select **Close permit** when the job is complete. If necessary, the permit coordinator can perform the following further actions after closing the permit:

- If there are unsafe condition, select **Cancel permit** in the UI action menu.
- If a danger is expected after the permit is issued, select **Suspend permit** in the UI action menu. The permit can be suspended until the inspection is completed.

Add an action to a health and safety permit-to-work request

Create a Health and Safety action to a requested permit-to-work. This helps to address the root cause of any reported safety occurrence.

Before you begin
Role required: sn_hs_rm.permit_coordinator

Procedure
1. Navigate to **All** > *Health and Safety* > **Health and Safety Workspace**.
2. Select the risk management icon ( ).
3. Select the **Permit to work** list and select **All**.
4. Open a permit record to add an action.
5. In the *Health and Safety* actions tab of the related items, select **New**.
6. On the form, fill in the fields.
   For information on field description, see Health and Safety action form.
7. Select **Save**.
   The action appears in the list of actions in the **Health and Safety actions** tab of the permit record. It is also listed in the **Actions** list on Health and Safety Workspace.

Monitoring and analyzing safety risk metrics

The **Risk Management** tab of the Health and Safety dashboard provides a comprehensive and interactive view for monitoring and analyzing safety risk metrics. By providing real-time insights into inspections, job safety analyses (JSAs), and various hazard and risk categories, it enables you to proactively identify trends, respond swiftly to emerging issues, and continuously enhance workplace safety across all organizational levels.

For any selected period and location, you can drill down into detailed data for granular visibility for risk mitigation strategies.

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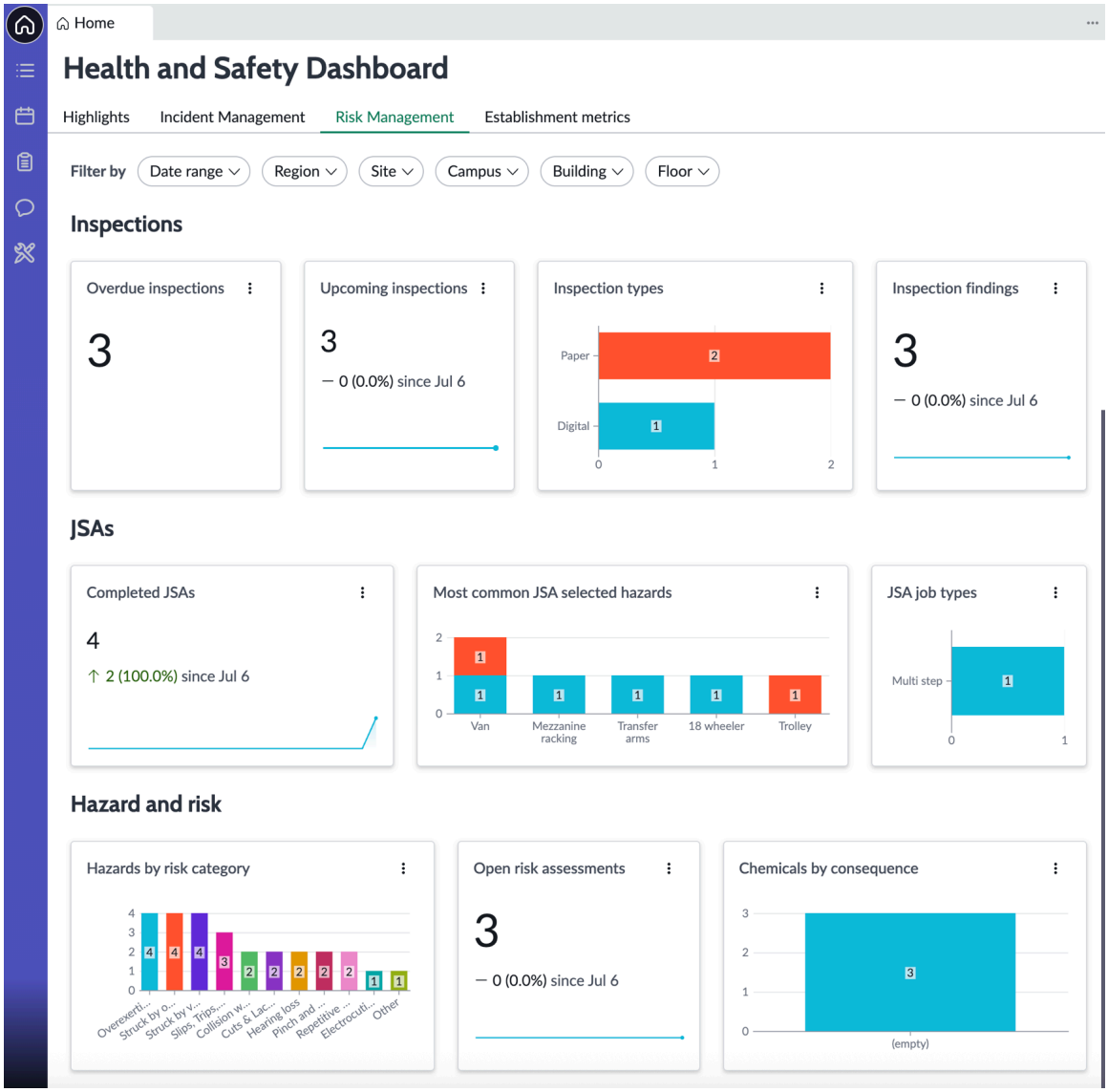

Prerequisites

- Ensure that Health and Safety Risk Management and Health and Safety Incident Management applications are installed. For more information, see Install Health and Safety Risk Management.
- Run the *[OHS] Safety Metrics* scheduled job to update the safety metrics on demand. For more information, see Configure scheduled job to generate frequency rates.

> **Note:** The *[OHS] Safety Metrics* job is set to run daily by default.

Required roles

- sn_ohs_im.manager or sn_ohs_im.agent, needed to see dashboard home page. The metrics on the **Risk Management** tab are dependent on the user's access to that table.
- sn_ohs_im.admin and the following roles, to edit the dashboard:
  - pa_admin, to edit the Performance Analytics (PA) components used in the dashboard.
  - ui_builder_admin, to edit the dashboard visualizations that are built using the UI Builder.

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Access the Health and Safety Incident Management metrics

Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Risk Management** tab on the Health and Safety dashboard.

Note: To view only a high-level summary of key risk metrics such as the open risk assessments or overdue inspections, select the **Highlights** tab.

Metrics on Risk Management tab

The availability of cards and metrics in this tab depends on the user's access to the table where the data comes from.

Inspections section

Card	Description	PA indicators
Overdue inspections	Count of safety inspections that are open past their survey due dates. Select the card to view a complete list of these open inspections.	None
Upcoming inspections	Count of open safety inspections that day and a one-week trend. Select the card to further drill down and visualize data, for example, see trend over different time aggregation of data.	Health & Safety - Open Inspections
Inspection types	Number of active safety inspections with bars counting digital and paper type inspections. Select an inspection format in the graph to view a complete list of active inspections of that type.	None
Inspection findings	Count of open safety inspections' findings that day including a trend line. Select the card to further drill down and visualize data, for example, see trend over different time aggregation of data.	Health & Safety - Inspection Findings

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JSAs section

Card	Description	Indicators
Completed JSAs	Count of completed JSAs and a trend line. Select the card to further drill down and visualize data.	Health & Safety - Completed JSAs
Most common JSA selected hazards	Chart of the most common hazards that are selected on JSAs.	None
JSA job types	Number of JSA jobs with bars of counts of multi-step and single step jobs. Select a job type in the graph to view a complete list of jobs of that type.	None

Hazard and risk section

Card	Description	Indicators
Hazards by risk category	Count of active hazards in the system grouped by their risk category. Select a hazard in the bar graph to view a complete list of active hazards of that type.	None
Open risk assessments	Count of open safety risk assessments that day with a trend line. Select the card to further drill down and visualize data.	Health & Safety - Open Risk Assessments
Chemicals by consequence	Count of chemicals based on the **Consequence** level in the chemical record. Select a consequence type column in the bar graph to view a list of active chemicals of that type.	None

Customizing widgets

You can customize the widgets in the dashboard to display relevant metrics by using the UI Builder. For more information, see UI Builder tutorial.

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Health and Safety Risk Management reference

Using the reference topics, learn about the components, such as the roles, tables, plugins, and store applications that are installed when you install the Health and Safety Risk Management application. Reference topics also provide additional information about the lists and forms that you use to configure and use Health and Safety Risk Management.

Components installed with Health and Safety Risk Management

Several types of components are installed with installation of the Health and Safety Risk Management application, including tables, user roles, and scheduled jobs. The application also installs related store applications if they aren't already installed.

Store applications installed

Store apps installed with Health and Safety Risk Management

Store application	Description
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.
Workplace Core [sn_wsd_core]	Enables workplace locations for Health and Safety applications. **Important:** The application installation doesn't install the location demo data for the Workplace Core location model. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.
Risk Heatmap [sn_risk_heatmap]	Provides a heatmap component that enables you to visualize the risk posture of a safety risk assessment.
Smart Assessment Engine	Enables creating smart assessments for safety inspection or audits. For more information, see Smart Assessment Engine.

Roles installed

Roles in Health and Safety Risk Management

Role title [name]	Description	Contains roles
Hierarchy of controls manager	Create, update, and delete control	sn_hs_rm.hierarchy_of_controls_writer

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
[sn_hs_rm.hierarchy_of_controls_manager]	measure categories	
Hierarchy of controls writer [sn_hs_rm.hierarchy_of_controls_writer]	Create and update control measure categories	sn_hs_rm.hierarchy_of_controls_reader
Job safety analysis writer [sn_hs_rm.job_safety_analysis_writer]	• Create and update job safety analyses (JSAs) • View filed JSA records	• sn_hs_rm.risk_category_reader • sn_hs_rm.job_safety_analysis_reader • sn_hs_rm.hazard_reader • sn_hs_rm.hierarchy_of_controls_reader • sn_wsd_core.location_reader • sn_hs_rm.control_measure_reader
Risk manager [sn_hs_rm.risk_manager]	Manager for risk team who can • View job safety analysis (JSA) records in Health and Safety Workspace • Create and update job safety analyses (JSAs) from Health and Safety Workspace • Create, update, and delete: ○ Hazards ○ Control measures ○ Jobs in Job register ○ Risk matrixes including risk	• sn_hs_rm.job_safety_analysis_reader • sn_ohs_im.workspace_user • canvas_user • sn_hs_rm.risk_data_manager

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
	severity, likelihood, and tolerance	
Job safety analysis reporter [sn_hs_rm.jsa_reporter]	• View filed JSA records • Submit JSAs from Employee Center and Now Mobile app • Use pre-defined jobs from job register when submitting JSAs	• sn_hs_rm.job_reader • sn_hs_rm.job_safety_analysis_writer • sn_hs_rm.template_reader
Risk assessment approver [sn_hs_rm.risk_assessment_approver]	• Work on approval tasks through Employee Center • Review and approve risk assessments	sn_hs_rm.risk_assessment_reader
Risk assessment manager [sn_hs_rm.risk_assessment_manager]	Risk assessment manager who can: • Create risk matrixes • Conduct risk assessments • Assign risk assessments to approver	• sn_hs_rm.risk_assessment_writer • sn_hs_rm.risk_assessment_approver
Risk assessment writer [sn_hs_rm.risk_assessment_writer]	Create and update risk assessments	• sn_hs_rm.job_reader • sn_hs_rm.risk_assessment_reader • sn_ohs_im.action_writer

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
Risk category manager [sn_hs_rm.risk_category_manager]	Create, update, and delete risk categories	sn_hs_rm.risk_category_writer
Risk category writer [sn_hs_rm.risk_category_writer]	Create and update risk categories	sn_hs_rm.risk_category_reader
Risk data manager [sn_hs_rm.risk_data_manager]	Create, update, and delete • Hazards • Control measures • Jobs in Job register • Risk matrixes including risk severity, likelihood, and tolerance	sn_hs_rm.risk_data_writer
Risk data writer [sn_hs_rm.risk_data_writer]	Create and update: • Hazards • Control measures • Jobs in Job register • Risk matrixes including risk severity, likelihood, and tolerance	• sn_hs_rm.risk_category_reader • sn_hs_rm.job_reader • sn_hs_rm.hazard_reader • sn_hs_rm.risk_matrix_reader • sn_hs_rm.template_reader • sn_hs_rm.hierarchy_of_controls_reader • sn_wsd_core.location_reader • sn_hs_rm.control_measure_reader
Inspection schedule writer [sn_hs_rm.inspection_schedule_writer]	Create and update inspection schedules	sn_hs_rm.inspection_schedule_reader
Safety inspection manager [sn_hs_rm.safety_inspection_manager]	Inspection manager who can	• sn_hs_rm.inspection_schedule_writer • sn_ohs_im.action_manager

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
	• Build inspection surveys with the Survey designer • Create and manage safety inspections in Health and Safety Workspace • Schedule safety inspections Health and Safety Workspace • Complete inspection surveys • Create, update, and delete inspection findings, RCA, and actions	• sn_hs_rm.safety_inspection_writer • survey_creator
Safety inspection writer [sn_hs_rm.safety_inspection_writer]	Create and update safety inspections and related records	• sn_ohs_im.workspace_user • sn_hs_rm.safety_inspection_reader • canvas_user • sn_ohs_im.action_writer • survey_reader
Safety register manager [sn_hs_rm.safety_register_manager]	Create, update, and delete safety registers	sn_hs_rm.safety_register_writer
Safety_register_writer [sn_hs_rm.safety_register_writer]	Create and update safety registers	• sn_wsd_core.location_reader • sn_hs_rm.safety_register_reader • sn_ohs_im.action_writer

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
Risk matrix reader [sn_hs_rm.risk_matrix_reader]	Can view risk matrixes	None
Job reader [sn_hs_rm.job_reader]	Can view jobs defined in the Job register	None
JSA template reader [sn_hs_rm.template_reader]	Can view job safety analysis templates	None
Control measure reader [sn_hs_rm.control_measure_reader]	Can view control measures	None
Hazard reader [sn_hs_rm.hazard_reader]	Can view hazards	None
Hierarchy of controls reader [sn_hs_rm.hierarchy_of_controls_reader]	Can view control measure categories	sn_ohs_im.hs_profile_reader
Inspection schedule reader [sn_hs_rm.inspection_schedule_reader]	Can view inspection schedules	None
Safety inspection reader [sn_hs_rm.safety_inspection_reader]	Can view safety inspections and its related records and fields	• sn_ohs_im.hs_profile_reader • sn_hs_rm.hazard_reader • sn_hs_rm.risk_matrix_reader • sn_wsd_core.location_reader • sn_ohs_im.incident_reader • sn_ohs_im.action_reader
Job safety analysis reader [sn_hs_rm.job_safety_analysis_reader]	Can view job safety analyses	sn_ohs_im.hs_profile_reader

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
Risk assessment reader [sn_hs_rm.risk_assessment_reader]	Can view risk assessments and related records such as risk actions	• sn_ohs_im.hs_profile_reader • sn_hs_rm.job_reader • sn_hs_rm.hazard_reader • sn_hs_rm.risk_matrix_reader • sn_wsd_core.location_reader • sn_hs_rm.control_measure_reader • sn_ohs_im.workspace_user • canvas_user • sn_ohs_im.action_reader
Risk category reader [sn_hs_rm.risk_category_reader]	Can view risk categories	sn_ohs_im.hs_profile_reader
Safety register reader [sn_hs_rm.safety_register_reader]	Can view safety registers	None
Safety audit schedule reader [sn_hs_rm.audit_schedule_reader]	Can view audit schedule	None
Safety audit schedule writer [sn_hs_rm.audit_schedule_writer]	Can write audit schedule	sn_hs_rm.audit_schedule_reader
Safety audit manager [sn_hs_rm.safety_audit_manager]	Audit manager who can • Build audit surveys with the Survey designer • Create and manage safety audits in Health and Safety Workspace • Schedule safety audits Health and Safety Workspace	• sn_ohs_im.action_manager • sn_hs_rm.safety_audit_writer • sn_ohs_im.observation_writer • survey_creator • sn_ohs_im.observation_reader • sn_hs_rm.audit_schedule_writer

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
	• Complete audit surveys • Create, update, and delete audit findings, RCA, observations, risk assessments, and actions	
Safety audit reader [sn_hs_rm.safety_audit_reader]	Can view safety audit	• sn_ohs_im.hs_profile_reader • sn_hs_rm.hazard_reader • sn_hs_rm.risk_matrix_reader • sn_wsd_core.location_reader • sn_ohs_im.incident_reader • sn_hs_rm.risk_assessment_reader • sn_ohs_im.action_reader
Safety audit writer [sn_hs_rm.safety_audit_writer]	Can write safety audit	• sn_ohs_im.document_writer • sn_ohs_im.workspace_user • canvas_user • sn_hs_rm.risk_assessment_writer • sn_ohs_im.action_writer • sn_ohs_im.observation_writer_restricted • survey_reader • sn_hs_rm.safety_audit_reader • sn_ohs_im.document_reader • survey_creator • sn_ohs_im.observation_reader
Industrial hygienist [sn_hs_rm.industrial_hygienist]	Industrial hygienist who can: • Create exposure types • Conduct exposure assessments	• sn_ohs_im.document_writer • sn_hs_rm.hazard_reader • sn_hs_crm.company_writter • sn_ohs_im.action_schedule_writer • sn_ohs_im.hs_profile_writer • sn_hs_rm.control_measure_reader • sn_hs_rm.safety_register_reader

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
	• Assign actions to people affected by exposure	• sn_hs_rm.exposure_reader • sn_hs_rm.risk_assessment_reader • sn_hs_crm.company_reader • sn_hs_rm.exposure_writer • sn_ohs_im.document_reader
Exposure_writer [sn_hs_rm.exposure_writer]	Can create and update exposure related records	sn_hs_rm.exposure_reader
Exposure reader [sn_hs_rm.exposure_reader]	Can view exposure records	None
Permit requestor [sn_hs_rm.permit_requestor]	Can request a permit and the type of work	• sn_ohs_im.hs_profile_reader • sn_hs_rm.job_safety_analysis_reader • sn_hs_rm.safety_register_reader • sn_hs_rm.risk_assessment_reader • sn_hs_rm.safety_inspection_reader
Permit approver [sn_hs_rm.permit_approver]	Can approve or reject permit to work request.	• sn_ohs_im.hs_profile_reader • sn_hs_rm.job_safety_analysis_reader • sn_hs_rm.safety_register_reader • sn_hs_rm.risk_assessment_reader • sn_hs_rm.safety_inspection_reader
Permit coordinator [sn_hs_rm.permit_coordinator]	• Oversees the permit to work workflow. • Can issue, reject, or suspend a permit.	• sn_hs_rm.permit_writer • sn_ohs_im.action_manager • sn_ohs_im.workspace_user
Permit reader [sn_hs_rm.permit_reader]	Can view a permit record.	None

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Roles in Health and Safety Risk Management (continued)

Role title [name]	Description	Contains roles
Permit writer [sn_hs_rm.permit_writer]	Can create and update permit request.	• sn_ohs_im.hs_profile_reader • sn_hs_rm.job_safety_analysis_reader • sn_hs_rm.permit_reader • sn_hs_rm.safety_register_reader • sn_hs_rm.risk_assessment_reader • sn_hs_rm.safety_inspection_reader

Tables installed

Tables installed with Health and Safety Risk Management

Table	Description
Affected people [sn_hs_rm_affected_people]	Stores all users affected by exposures across all locations.
Audits [sn_hs_rm_audit]	Stores all safety audit records created standalone as well as generated from audit schedules. This table extends the Health and Safety task [sn_ohs_im_task] table.
Audit schedule [sn_hs_rm_audit_schedule]	Stores all audit schedules created for safety audits. This table extends the Health and Safety schedule [sn_ohs_im_schedule] table.
Audit questionnaire [sn_hs_rm_audit_survey]	Stores all audit questionnaires such as smart assessments and surveys for safety audits. This table extends the Health and Safety task [sn_ohs_im_task] table.
Criteria [sn_hs_rm_audit_criteria]	Stores all criteria for safety audits.
Item for review [sn_hs_rm_audit_item_for_review]	Stores all items for review for safety audits. This table extends the Health and Safety task [sn_ohs_im_task] table.
Objective [sn_hs_rm_audit_objective]	Stores all objectives for safety audits. This table extends the Health and Safety task [sn_ohs_im_task] table.
Control measure	Stores all control measures that are in place to help prevent or mitigate hazards in your organization.

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Tables installed with Health and Safety Risk Management (continued)

Table	Description
[sn_hs_rm_control_measure]	
Document link [sn_hs_rm_document_link]	Stores all document links for jobs created in the job register.
Exposure [sn_hs_rm_exposure]	Stores all exposure records generated from exposure assessments across all locations.
Exposure assessment [sn_hs_rm_exposure_assessment]	Stores all exposure assessments conducted for exposure types across all locations.
Exposure source [sn_hs_rm_exposure_source]	Stores all exposure sources identified for exposure measurements across all locations.
Exposure type [sn_hs_rm_exposure_type]	Stores all exposure types identified across all locations.
Finding [sn_hs_rm_finding]	Stores all records of findings created for safety inspections. This table extends the Health and Safety task [sn_ohs_im_task] table.
Hazard [sn_hs_rm_hazard]	Stores all identified and potential workplace hazards related to all jobs and task types in your organization.
Hazard assessment [sn_hs_rm_hazard_assessment]	Stores all hazard assessments performed as part of risk assessments.
Hierarchy of controls [sn_hs_rm_hierarchy_of_controls]	Stores all categories for control measures in your organization. All controls that are related to hazards in your organization are arranged under these categories.
Persons informed [sn_hs_rm_informed_persons]	Stores names of all employees and workers who are informed of their job hazards when submitting JSAs.
Inspection [sn_hs_rm_inspection]	Stores all safety inspection records created standalone as well as generated from inspection schedules. This table

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Tables installed with Health and Safety Risk Management (continued)

Table	Description
	extends the Health and Safety task [sn_ohs_im_task] table.
Inspection schedule [sn_hs_rm_inspection_schedule]	Stores all inspection schedules created for safety inspections. This table extends the Health and Safety task [sn_ohs_im_task] table.
Job [sn_hs_rm_job]	Stores all jobs with predefined hazards and controls created in the job register. These jobs can be used to quickly submit JSAs and conduct risk assessments.
Hazards and controls [sn_hs_rm_job_hazard]	Stores hazards and controls associated with all of the jobs defined in the job register.
Job Safety Analysis [sn_hs_rm_job_safety_analysis]	Stores all job safety analyses (JSAs) submitted by employees through Employee Center and Now Mobile app.
Job step [sn_hs_rm_job_step]	Stores all jobs steps for the multi-step jobs defined in the job register.
JSA step [sn_hs_rm_jsa_step]	Stores all jobs steps that are added for multi-step jobs when submitting JSAs.
Exposure assessment document [sn_hs_rm_m2m_exposure_assessment_document]	Stores all documents related to exposure assessments across all locations.
Measurement [sn_hs_rm_measurement]	Stores all measurements recorded for exposure assessments across all locations.
Permit checklist [sn_hs_rm_permit_checklist]	Stores information related to items, tasks, or steps in a checklist.
Permit to work [sn_hs_rm_work_permit]	Stores data related to the permit to work request.
Risk assessment [sn_hs_rm_risk_assessment]	Stores all records of risk assessments conducted. This table extends the Health and Safety task [sn_ohs_im_task] table.

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Tables installed with Health and Safety Risk Management (continued)

Table	Description
Risk category [sn_hs_rm_risk_category]	Stores all risk categories for hazards in your organization. All workplace hazards related to all job types in your organization are arranged in these risk categories.
Risks and controls [sn_hs_rm_risk_controls]	Stores all Risks and controls records associated with all risk assessments.
Risk matrix [sn_hs_rm_risk_matrix]	Stores all risk matrixes created for your organization.
Risk tolerance [sn_hs_rm_risk_tolerance]	Stores all risk tolerance records associated with all risk matrixes created.
Safety Register [sn_hs_rm_safety_register]	Stores all safety registers created for the hazardous material used in your organization. This table extends the Health and Safety task [sn_ohs_im_task] table.
Asbestos Safety Register [sn_hs_rm_safety_register_asbestos]	Stores all safety registers created for asbestos material used in your organization. This table extends the Safety Register [sn_hs_rm_safety_register] table.
Chemical Safety Register [sn_hs_rm_safety_register_chemical]	Stores all safety registers created for chemicals. This table extends the Safety Register [sn_hs_rm_safety_register] table.
Template [sn_hs_rm_template]	Stores all JSA templates with predefined hazards and controls for each job type in your organization.

Submit JSA form

Employees can use the Submit JSA form to analyze their job safety at their point of work and create a JSA.

For more information on submitting a JSA, see Submit a JSA from Employee Center.

Submit JSA form

Field	Description
Enter job details	

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Submit JSA form (continued)

Field	Description
Select job location	Job or task location where this job and the associated risks may arise or exists.
Enter job location manually	Job or task location. If your job location isn't available in the system, enter it manually.
Enter a name of the JSA	Name of this JSA.
Select job	Job with pre-defined hazards and controls for your job type. If you select a job, all hazards and control measures for your job type are auto-populated from this pre-defined job. Only the active jobs from the Job [sn_hs_rm_job] table are available in this list. For more information, see Define a job in the job register.
Job start date and time	Date and time when your job starts.
JSA expiry date and time	Date and time when this JSA for your job expires.
Select hazards and control measures	
Do you want to create a multi step job?	Option to indicate if this JSA is for a single-step or a multi-step job. If you selected a job in the **Select job** field, this field is automatically set depending on the type of the job you selected and is read-only.
Add job steps and their hazards and controls	Job steps and their associated hazards and control measures. This field appears only when it's a multi-step job and **Do you want to create a multi step job?** is set as **Yes**. If you selected a multi-step job in the **Select job** field, all its job steps and their associated hazards and controls are auto-populated in this field. • However, you can add or remove job steps as required. To remove a job step that isn't relevant for your job, select the remove icon ( ) in the **Actions column**. To remove all job steps, select **Remove all**. • You can also add or remove hazards and controls for each job step. To review them, select the edit icon ( ) in the **Actions column** for the job step.
Add job step	Option to add a job step if it's a multi-step job.

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Submit JSA form (continued)

Field	Description
Add hazards and controls	Hazards and the available control measures associated with a job. This field appears only when it's a single-step job and **Do you want to create a multi step job?** is set as **No**. If you selected a single-step job in the **Select job** field, all hazards and control measures for your job type are auto-populated from this pre-defined job. However, you can add or remove them as required. • To remove a hazard and control that isn't relevant for your job, select the remove icon ( ) in the **Actions column**. To remove all of them, select **Remove all**. • To review and modify them, select the edit icon ( ) in the **Actions column**.
Add hazards	Potential hazards that may arise or exist for the job or job step. Select all potential hazards for your job type using the **Add job step** or **Add hazards and controls** button. If you selected a job in the **Select job** field, all hazards are auto-populated from this pre-defined job. However, you can add or remove hazards as required.
Add additional hazards	Any other hazards that are identified but not available in the **Add hazards** window. Enter it manually to add.
Add control measures	Control measures that are available for the selected hazards. Select all controls that are in place in your organization. If you selected a job in the **Select job** field, all control measures are auto-populated from this pre-defined job. However, you can add or remove controls as required.
Add additional control measures	Any other control measures that should be in place and aren't available in the **Add control measures** window. Enter it manually to add.
Links to useful documents	Documents links related to the job. This field appears only when you selected a job in the **Select job** field and that job has associated document links. The document links from the selected job are auto-populated in this field.

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Submit JSA form (continued)

Field	Description
Add additional details	
Select employee/workers who have been informed	Employees, contractors, and any other workers who've been informed about the risks and controls related to this job at your workplace. They are typically the people who can be impacted by this JSA and must be aware of it. Add them with an acknowledgement using the **Add employee/workers** button. **Note:** • The **Contractor** option in the **Person type** field appears only when the Health and Safety Contractor Management (sn_hs_crm) application is installed on your instance. For more information, see Additional features in Health and Safety. • For a contractor, the **Name** field only lists users who have the [snc_external] role assigned to them and have their Health and Safety profile created. For more information, see Assign Health and Safety profile to a user.
Add remarks	Any comments related to your job or this JSA.
Add attachments	Attachments such as image, video, or document related to this job or JSA.

Risk matrix form

Safety team can use the risk matrixes to create and conduct risk assessments in the Health and Safety Workspace.

For more information, see Conduct a safety risk assessment.

Risk matrix details

Field	Description
Risk matrix details	
Number	System-generated unique number for the risk matrix.
Location	Location that this risk matrix applies to.
Short description	Brief description about the risk matrix.

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Risk matrix details (continued)

Field	Description
Matrix grid	Size of the grid to use, for example, 4*4 and 5*5.
Active	Option for making the matrix available for use. A risk matrix must be active to be used.
Likelihood and severity	
Likelihood level	Description of the likelihood level. These descriptions are used to populate the likelihood options on risk assessments where this matrix is used. The number of likelihood levels is based on the selected grid size. For example, for a matrix grid of size 5*2, there are five likelihood levels.
Severity level	Description of the severity level. These descriptions are used to populate the severity options on risk assessments where this matrix is used. The number of severity levels is based on the selected grid size. For example, for a matrix grid of size 5*2, there are two severity levels.
Risk tolerance	
Risk tolerance	Range, color, and description of the risk level. Select a range and color and enter a title for it. This risk tolerance range and title computes the risk level for a hazard on the **Hazard assessment** form, **Risk analyses** tab, and the risk assessment form header. For more information, see Assess a hazard and its risk levels. The value of the range is determined by multiplying likelihood level by severity level. For example, according to the grid in the following image, a hazard with a level 3 likelihood (Once per month) and a level 2 severity (Minor) has a risk tolerance of 3*2 = 6. The risk level for this hazard lies in the range 3 to 6, therefore, its risk level is displayed as Moderate.

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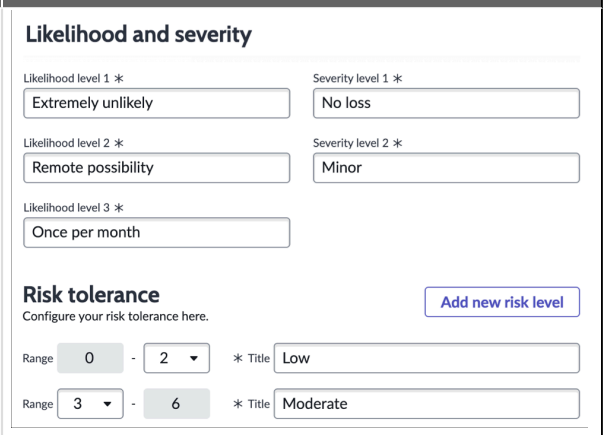
Risk matrix details (continued)

Field	Description
	
Risk matrix preview	
Risk matrix preview	Heatmap for visual representation of the risk matrix based on the defined levels, colors, and ranges in the real time.

Risk assessment form

Risk assessment managers can use the risk assessment form to conduct their risk assessments.

For information on performing risk assessments, see Conduct a safety risk assessment.

Risk assessment details

Field	Description
Name	Name of the risk assessment.
Short description	Brief description about this risk assessment.
State	State of the risk assessment.
Approval	State of approval of this risk assessment.
Location	Location that this risk assessment applies to.
Risk type	Type of risk to be assessed.
Created on	Date when the risk assessment is created. This field is auto-populated with the date this risk assessment is created on.
Assessment completed	Date when the risk assessment is complete.
Select a risk matrix	Risk matrix that is used in the risk assessment to evaluate the risk levels for selected hazards. The matrix determines the risk level, both before and after controls, based on the severity and likelihood of the hazard. The items in this field display active matrixes from the Risk matrix [sn_hs_rm_risk_matrix]

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Risk assessment details (continued)

Field	Description
	table. If there's only one active matrix, it's selected by default.
Jobs to be assessed	Predefined job in the job register that this risk assessment is conducted for. You can select multiple jobs in this field. For information on predefined jobs, see Jobs in the job register.
Audit	Audit that this assessment is related to.
Safety register	Safety register that this assessment is related to.
People at risk	Names of the employees, user groups, or any other people at risk.
People responsible for control	Names of the employees or user groups who are responsible for implementing control measures.
Description	Detailed description about this risk assessment.
Assign to reviewer	Reviewer for the risk assessment. If necessary, select a reviewer after the risk assessment is complete.
Assign to approver	Approver for the risk assessment. Select an approver after the risk assessment is complete. Only a user with the Risk assessment approver [sn_hs_rm.risk_assessment_approver] role can be assigned as an approver. **Note:** Only a user with the Risk assessment manager [sn_hs_rm.risk_assessment_manager] role can assign a risk assessment to an approver.

Hazard assessment form

Risk assessment managers can use the hazard assessment form to review a hazard and choose their control measures and assess their risk levels.

For information on performing hazard assessments, see Assess safety hazards and risk levels for a risk analysis.

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Hazard assessment

Field	Description
Number	System-generated unique number for the hazard assessment.
Risk analysis	Risk analysis associated with this hazard assessment. This field is auto-populated with the risk analysis number that this hazard assessment is created from.
Job under assessment	Predefined job in the job register that this hazard assessment is conducted for. For information on predefined jobs, see Jobs in the job register. If the hazard comes from an imported job, this field is auto-populated from that job.
Job step under assessment	Job step in the selected job that this hazard assessment is conducted for. If the hazard comes from an imported job, this field is auto-populated from that job. This field appears only when a job is selected in the **Job under assessed** field and the job has multiple steps.
Hazard being assessed	Hazard that this being reviewed in this assessment.
Hazard category	Name of the hazard category under which this hazard is organized. This field is auto-populated from the selected hazard.
Effect caused by this hazard	Effect that the selected hazard could have, for example, burns.
Available Control Measures	Control measures that are available to select.
Selected Control Measures	Control measures that could help prevent the selected hazard. Select all controls that can help prevent or minimize the effect caused by the selected hazard. If a control measures should be in place and isn't available in the **Available Control Measures** field, select **Create new control** to define a new control. For more information,

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Hazard assessment (continued)

Field	Description
	see Define Health and Safety control measures.
Inherent severity	Severity of the hazard before control measures are in place.
Inherent likelihood	Likelihood of the hazard before controls.
Residual severity	Severity of the hazard after control measures have been put in place.
Residual likelihood	Likelihood of the hazard after control measures have been put in place.
Inherent risk	Risk level of the hazard before controls. The risk matrix used in the associated risk assessment evaluates the inherent risk level based on the severity and likelihood of the hazard before controls. For more information on risk level calculation, see Risk matrix form.
Residual risk	Risk level of the hazard after controls. The associated risk matrix evaluates the residual risk level for the hazard based on the severity and likelihood of the hazard after controls. After controls, the risk level should be reduced.

Inspection schedule form

Safety inspection manager can use the inspection schedule form to set up a recurring workplace safety inspection.

For information on setting up an inspection schedule, see Set up a safety inspection schedule.

Inspection details

Field	Description
Short description	Brief description about this safety inspection schedule.
Active	Option for marking the inspection schedule available for use. An inspection schedule must be active to be used.
Inspection format	Format in which this inspection is carried out. • **Digital**: The assigned person completes the inspection electronically via the selected smart assessment or survey within the application.

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Inspection details (continued)

Field	Description
	• **Paper**: The assigned person completes the inspection on paper and uploads a photo or document of the completed inspection as an attachment to the inspection record.
Assessment type	Type of digital assessment to be conducted for this inspection. This field appears only when **Inspection format** is set as **Digital**.
Smart Assessment Template	Smart assessment template to be used to complete this inspection. Only the templates with the **Assessment targets** field set to Inspection [sn_hs_rm_inspection] table are available in this list. Use smart assessment templates available with the application or build new ones with the Smart Assessment Engine. For more information, see Configure a Smart Assessment template. This field appears only when **Inspection format** is set as **Digital** and **Assessment type** is set as **Smart Assessment**.
Inspection survey	Inspection survey to be completed for this inspection. Select the survey to use. Only the surveys with the **Source table** field set to Inspection [sn_hs_rm_inspection] table are available in this list. Use surveys available with the application or build new ones with the Survey designer. You can also associate any of your pre-built surveys with inspection records in Health and Safety Risk Management. For more information, see Configure a safety inspection or audit survey. This field appears only when **Inspection format** is set as **Digital** and **Assessment type** is set as **Survey**.
Assignment group	User group this inspection is assigned to. Only members of this group can view and take the smart assessment or survey.
Assigned to	User this inspection is assigned to.
Location	Location that this safety inspection applies to.

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Inspection details (continued)

Field	Description
Assets	Assets that this inspection is related to. For example, the inspection needs to be conducted on these assets. **Note:** The assets field appears only when Expanded Model and Asset Classes [sn_ent] application is installed. For more information, see Additional features in Health and Safety

Duration details

Field	Description
Start date	Date when an inspection record is first created for this schedule.
End date	Date when the last inspection record is created for this schedule.
Frequency	Frequency between the start and end date at which the system generates an inspection record such as daily, weekly, or monthly.
Months to generate	Months when the recurring inspection records should be generated. When you enter a date range covering an entire year with a monthly frequency, you can select which particular months to generate inspection records for—The inspection doesn't have to happen every month. This field appears only when **Frequency** is set as **Monthly**.
Survey expiration period	Number of days for the smart assessment or survey to expire after its start date.

Audit schedule form

The safety audit manager can use the audit schedule form to set up a recurring workplace safety audit.

For information on setting up an audit schedule, see Set up a safety audit schedule.

Audit schedule details

Field	Description
Number	System-generated unique number for the audit schedule.
Short description	Brief description about the audit schedule.

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Audit schedule details (continued)

Field	Description
Assignment group	User group this audit is assigned to. Only members of this group can view and work on this audit.
Assigned to	User this audit is assigned to.
Location	Location that this safety audit applies to.
Regulatory Audit	Option to indicate whether this audit is a regulatory audit.
Assets	Assets that this audit is related to. For example, the audit needs to be conducted on these assets. **Note:** The assets field appears only when Expanded Model and Asset Classes [sn_ent] application is installed. For more information, see Additional features in Health and Safety
Risk matrix	Risk matrix used for risk assessments for this audit.
Audit scope	Detailed description about the scope of this audit.
Audit goals	Detailed description about the goals of this audit.

Duration details

Field	Description
Start date	Date when an audit record is first created for this schedule.
End date	Date when the last audit record is created for this schedule.
Frequency	Frequency between the start and end date at which the system generates an audit record such as daily, weekly, or monthly.
Months to generate	Months when the recurring audit records should be generated. When you enter a date range covering an entire year with a monthly frequency, you can select which particular months to generate audit records for—The audit doesn't have to happen every month. This field appears only when **Frequency** is set as **Monthly**.

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Duration details (continued)

Field	Description
Weekly	Weekday when the recurring audit records should be generated. You can select which particular day of the week to generate audit records for—The audit doesn't have to happen every day in the week. This field appears only when **Frequency** is set as **Weekly**.

Audit questionnaire form

The safety audit manager can use the audit questionnaire form to assign a smart assessment or survey to be conducted as part of a safety audit.

For information on adding an audit questionnaire to an audit or audit schedule, see Set up a safety audit schedule.

Audit questionnaire fields

Field	Description
Number	System-generated unique number for the questionnaire record.
Assigned to	User this audit questionnaire is assigned to.
State	State of the audit questionnaire.
Assessment type	Type of the assessment to be conducted for this audit.
Audit smart assessment template	Smart assessment template to be used to complete this audit. Only the templates with the **Assessment targets** field set to Audit survey [sn_hs_rm_audit_survey] table are available in this list. Use smart assessment templates available with the application or build new ones with the Smart Assessment Engine. For more information, see Configure a Smart Assessment template. This field appears only when **Assessment type** is set as **Smart Assessment**.
Audit survey	Audit survey to be completed for this inspection. Select the survey to use. Only the surveys with the **Source table** field set to Inspection [sn_hs_rm_inspection] table are available in this list. Use surveys available with the application or build new ones with the Survey designer. You can also associate any of your pre-built surveys with inspection records

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Audit questionnaire fields (continued)

Field	Description
	in Health and Safety Risk Management. For more information, see Configure a safety inspection or audit survey. This field appears only when **Assessment type** is set as **Survey**.
Due date	Date by when this audit questionnaire should be complete.
Order	Order in which this assessment should be conducted when multiple audit questionnaires exist for an audit.
Description	Description of this safety audit schedule.

Objective form for safety audits

The safety audit manager can use the audit objectives form to define the objectives and scope of a safety audit.

For information on audit objectives, see Define an objective for a safety audit.

Objective fields

Field	Description
Name	Name of the objective.
State	State of the objective.
Priority	Priority level for this objective.
Locations	Locations that this objective applies to.
Departments	Departments that this objective applies to.
Assigned to	Person responsible for this objective. Only people added to the **People involved** list of this audit are available in this field. For more information, see Add people involved in a safety audit.
Method	Method how this objective should be assessed, for example, interview, document review, inspection, or any other method.
Due date	Date by which this objective must be completed.
Description	Detailed description about the purpose and scope of this objective.
Expected outcome	Description of what a satisfactory result looks like for this objective.

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Finding form for safety audits

When an audit's item for review is complete, the safety auditor can use the Findings form to log findings gathered from the review or survey responses.

For information on recording an audit finding, see Add a finding for a review item in a safety audit.

Finding details

Field	Description
Number	System-generated unique number for the finding.
Short description	Brief description about the finding.
Hazard	Potential hazard identified during the audit.
Risk assessment	Risk assessment for identified hazard.
Location	Location that this finding applies to.
Assigned to	User this finding is assigned to.
Description	Detailed description about the finding.
Attachment	Supporting files related to this finding. Select **Attach File** to upload the file.

Item for review

Field	Description
Item for review	Item for review from this audit that this finding is relates to. Only the review items associated with objectives in this audit appear in this field. For more information, see Define an objective for a safety audit.
Survey	Audit survey or questionnaire that includes this finding as a response. This field appears and is auto-populated when an audit survey is selected from **Item for review**.
Section	Category of survey questions. This field appears only when an audit survey is selected from **Item for review**. The field lists all question categories from the selected survey.
Question	Survey question this finding is submitted for. This field appears only when a category is selected from **Section**. The field lists all questions in the selected survey category.

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Item for review (continued)

Field	Description
Question Response	Submitted answer for the survey question. This field appears and is auto-populated with the response submitted for the selected survey question.
Criteria type	Criteria type this review item belongs to.
Criteria	Standards that the audit measures compliance against. The items in this list appear based on the selected **Criteria type** and the selected record of that type in audit's objectives. For more information, see Define an objective and criteria for an audit.
Criteria document	Link to the specific citation or regulation within the selected criteria record. This field appears only when Regulatory list or Authority document is selected from **Criteria type**.
Cited criterion	Specific clause, paragraph, section, or page reference entered from the selected criteria. This field appears only when H&S Document, Knowledge base article, or Text is selected from **Criteria type**.
Compliance	Compliance status of the system covered in the audit survey.
Work notes	Additional details about the finding.

Action schedule form for an exposure

The industrial hygienist can use the action schedule form for an action to be created when there's an active exposure.

For information on setting up an action schedule for an exposure, see Define an action schedule for affected people.

Action schedule

Field	Description
Short description	Brief description about this action.
Active	Option for marking the action schedule available for use.

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Action schedule (continued)

Field	Description
	An action schedule must be active for actions to be created and assigned to the affected people.
Location	Location that this action item applies to. The action is assigned to the affected people at this location. This field is automatically set to the location of the exposure assessment.
Type	Type of the action. • **Corrective**: An action to eliminate the causes of non-conformities or undesirable situations to stop them from happening again. • **Preventive**: An action to help prevent the occurrence of non-conformities. • **Task**: A generic task assigned as an action. • **Learning**: An action that includes a learning for the user, for example, completing a training. **Note:** The **Learning** option in this field appears only when the Learning Core (sn_lc) application is installed on your instance. For more information, see Additional features in Health and Safety.
Learning material	Learning material for the training, for example, knowledge article or URL for a training video. This field appears only when **Learning** is selected from **Type**. **Note:** This field lists the learning content created in Learning Core. For more information, see Managing course and catalog content.
Days to complete action after creation	Number of days by when this action should be complete after it's generated and assigned to a user. This field sets the due date of the assigned action.
This is recurring action	Option for marking this action as recurring.

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Action schedule (continued)

Field	Description
	When this option is selected, the **Duration details** section and fields appear.

The following duration details section appears only when the action schedule is set as recurring.

Duration details

Field	Description
Frequency	Frequency at which the system generates an action record such as daily, weekly, or monthly.
Weekly	Weekday when the recurring action records should be generated. You can select which particular day of the week to generate action records for—The action doesn't have to be created every day in the week. This field appears only when **Frequency** is set as **Weekly**.
Months to generate	Months when the recurring action records should be generated. You can select which particular months to generate action records for—The action doesn't have to be created every month. This field appears only when **Frequency** is set as **Monthly**.
Day	Day of the selected month when the schedule should run to generate the recurring action records. If the selected month has fewer days, the schedule will run on the last day of the month. This field appears only when **Frequency** is set as **Monthly**.

Permit-to-work request form

Description of the form to request a permit to work.

Permit to work form

Field	Description
Type	The type of permit.
Short description	Description of the permit.

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Permit to work form (continued)

Field	Description
Urgency	Option used to select the urgency of the permit request.
Risk assessment	The risk assessment associated with the request if any.
Risk before controls	Auto-populated when a risk assessment is selected.
Risk after controls	Auto-populated when a risk assessment is selected.
JSA	The job safety analysis (JSA) on the site that is associated with the request if any.
Safety register	Any safety register relevant to the request.
Inspection	Option to add an inspection with the permit if needed.
Work task	The Health and Safety record relevant to the request.
Location	The location of the job.
Work area	The work area at the location.
Start date and time	The shift start date and time.
End date and time	The shift end date and time.
Approvals due by	The permit approval date.
Watch list	The individuals to notify about the status of the request.
Requested for	The Individuals the permit is requested for.
Description	Description of the permit.
Comments	Optional comments.
Attachment	Option to add attachments related to this permit.

Choice new record form

Field description to add a new choice to create a new permit type.

Choice new record form

Field	Description
Table	Field to select the table to create a new permit type.
Element	The column for which the choice is created.
Language	Language code for the label.
Sequence	This field determines the order in which the choice appears.

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Choice new record form (continued)

Field	Description
Inactive	Option to make the choice inactive.
Label	Label to appear in the choice list.
Value	Value related to the label.
Dependent value	Leave empty.
Hint	Leave empty.

Variable set new record form

Field description to create a new variable set record.

Variable set new record form

Field	Description
Title	Title of a variable set. Appears if the **Display title** check box is selected.
Internal name	Variable set name for internal use.
Order	Order number for the variable set.
Type	Type of the variable set.
Application	Applications that can use this variable set.
Display title	Adds a title and an expandable header to the right of the variable set.
Layout	Set the layout display.
Description	Description of the variable set.

Variable new record form

Field description to create a new variable record.

Variable new record form

Field	Description
Application	Read-only field that indicates which applications can use this variable.
Type	The variable type that you want to create. For more information, see Types of service catalog variables.
Order	Order that the variable is placed on the page for the catalog item. The variables are organized from top to bottom from least to greatest order value. For example, a variable with an order value of 1 is placed above other variables with higher-order values.
Variable set	Variable set using the variable.

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Variable new record form (continued)

Field	Description
Active	Check box to make the variable available for use
Mandatory	Check box to mark the variable required as part of the ordering process.
Read only	Option to make a variable read only or editable.
Hidden	Option to hide a variable.
Question	
Question	Question to ask users ordering the catalog item.
Name	A name to identify the question.
Tooltip	Tooltip text to display when users hover over the variable. Enter a brief note to describe the purpose of the 'Question'.
Example text	Hint that is displayed in the question field before a user enters a value. Applicable for the following variables: • IP Address • Email • URL • Single Line Text • Wide Single Line Text • Multi Line Text • Date • Date/Time

Domain separation and Health and Safety Risk Management

Domain separation is supported for Health and Safety Risk Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application’s service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

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Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Domain-separated tables overview

All tables in the Health and Safety Risk Management can be domain-separated and include the required domain separation field.

How domain separation works in Health and Safety Risk Management

- Each table in Health and Safety Risk Management includes the domain separation fields **Domain** and **Domain path**.
- Customers can use these fields to configure domain separation in their implementation of Health and Safety Risk Management.

Related topics

Domain separation for service providers

Health and Safety Environmental Management

The ServiceNow® Health and Safety Environmental Management application is a solution in Health and Safety that focuses on environmental conformance. It provides a chemical management feature that enables organizations to manage chemicals, handle emissions and waste, and support regulatory conformance.

Get started

Exploring Health and Safety Environmental Management Explore  Detailed overview on Environmental Management and chemical management.	Setting up Health and Safety Environmental Management Configure  Configure the Health and Safety Environmental Management.	Chemical management Manage Chemicals  Learn how to create and manage chemical requests, maintain chemical records, and request Safety Data Sheets (SDS).
Integration of 3E with Health and Safety Environmental Management Integrate	Health and Safety Environmental Management reference Reference	

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Health and Safety Environmental Management integration with 3E services.



Get detailed description of the forms used in Health and Safety Environmental Management.

Troubleshoot and get help

- Ask questions and explore other resources for Health and Safety Environmental Management in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Health and Safety Environmental Management

Health and Safety Environmental Management helps organizations centralize and streamline the tracking of hazardous materials and chemicals. It reduces the reliance on manual processes and spreadsheets, improving data accuracy and conformance.

Environmental Management Workspace overview

In the Health and Safety Workspace, environmental management list view displays different types of records, which are as follows:

Environmental management list view

List type	Description
Chemical groups	Multiple chemicals grouped based on shared characteristics, such as type or usage.
Chemicals	Individual entries that store detailed information about each chemical, including hazard identification, ingredients (with concentrations), related documents (such as safety data sheets), and location-specific chemical items.
Chemical items	Specific physical containers or instances of a chemical stored at various locations, tracked within the chemical management system for inventory and conformance purposes.
Chemical requests	Submissions by employees to obtain or add chemicals, which are then reviewed, approved, or managed by chemical managers through an approval workflow.
Substances	Individual components or materials that make up the ingredients of a chemical within the chemical management system.

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Environmental management list view (continued)

List type	Description
Documents	Documents that are added to chemical groups, items, requests, or substances.
Actions	Tasks or steps created and assigned as part of the approval flow to manage chemical requests.

Chemical management overview

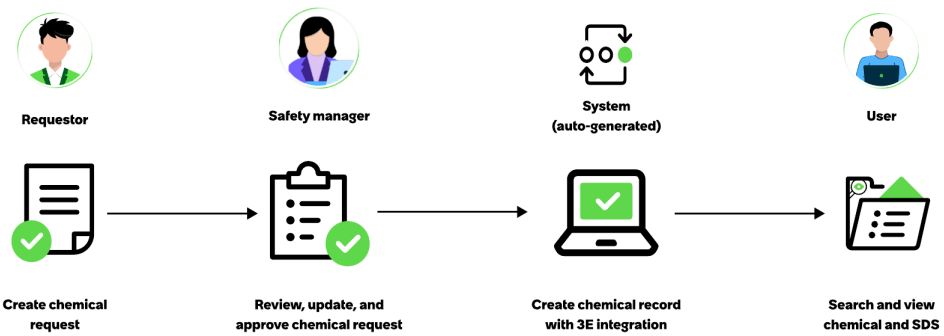
The chemical management solution is designed to scale for organizations with large chemical inventories and complex conformance needs. It provides tools for managing chemical requests, approvals, and risk assessments, supporting safer workplace practices.

Chemical management workflow

The chemical management workflow enables chemical managers effectively track chemical libraries and manage chemical requests. This workflow promotes employee safety by providing accurate safety data to workers who handle chemicals. Integration with the 3E database enables you to access the latest chemical safety data online. In the chemical management workflow,

- The employee uses the chemical library to view or look for chemicals that they want to work with.
- The employee can either select an existing chemical or request a new chemical from the Employee Center.
- The chemical manager receives the chemical request and can approve or reject it in the Health and Safety Workspace.

Chemical request process flow



Benefits

- Centralized tracking of chemical inventories makes it easier to manage large lists and hazardous materials.
- Enhanced compliance support provides quick access to hazard information and Safety Data Sheets (SDS) for chemicals.
- Streamlined chemical request and approval workflows, including 3E integration with the Employee Center and the Health and Safety Workspace. This workflow simplifies and accelerates the process.

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- Automatic updates of hazard data through integration with external providers, such as 3E Protect, promote the latest and most accurate safety information.
- Aggregation of hazard identification and ingredient data for chemical groups, supports risk assessment and safety planning.
- Facilitation of risk assessments by linking chemical requests to risk evaluation processes enables proactive hazard management.
- Support for document management with versioning and role-based access improves the ability to conduct audits and enhances the security of safety documents.

Chemical Library

In the Employee Center the chemical library displays a list of chemicals, its manufacturer, approved locations, and the person responsible for maintaining that chemical. You can search for a chemical using the **Location** or you can use the search box and enter a keyword. Selecting a chemical name displays the chemical record.

Chemical record overview

A chemical record in the system serves as a comprehensive repository for all relevant information about a specific chemical used within an organization. A chemical record includes GHS aligned detailed hazard identification, such as hazard classes, statements, and precautionary measures, enabling you quick access to critical safety data.

Note: The demo data provided is based on The Globally Harmonized System (GHS) revision 10 hazard classification. Integration with 3E systems ensures that the hazard category is automatically populated when a chemical request is created. Access to the correct hazard data is provided, enabling you to view up-to-date safety information for each chemical.

The ingredient information is captured, specifying the substances present and their respective concentrations, which supports both compliance and risk management activities.

Chemical records can be organized into groups, enabling for aggregation of ingredient and hazard data at the group level. This feature is useful for managing families of chemicals, such as cleaning products or solvents, and provides an overview of potential risks associated with each group. The record also maintains links to chemical items, detailing the physical storage locations of containers or bottles across various sites.

Document management is integrated into the chemical record, enabling attachment and versioning of safety data sheets (SDS) and other relevant documents, such as standard operating procedures. This confirms that all documentation is up-to-date and accessible for audits or regulatory reviews.

The system supports integration with external databases like 3E Protect, enabling automatic population of chemical metadata and safety information. Each chemical record can be associated with risk assessments and job safety analysis, facilitating conformance and supporting robust safety planning throughout the organization.

Chemical group

A chemical group is a way to organize chemicals together within the system, allowing you to group similar chemicals for easier management. For example, Acids chemical group contains different types of acids listed under it. The group aggregates information like the number of chemicals, chemical requests, ingredients, hazard identification, related documents, and risk assessments, providing a consolidated view of key details for all chemicals in that group.

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Setting up Health and Safety Environmental Management

Set up your implementation for Health and Safety Environmental Management by installing the application and reviewing, and configuring the components that are installed with the application.

Install Health and Safety Environmental Management

You can install the Health and Safety Environmental Management if you have the admin role. The application includes demo data and installs related ServiceNow Store applications and plugins if they aren't already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Health and Safety Environmental Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Health and Safety Environmental Management:

- Store applications
- Plugins
- Roles
- Tables

For more information, see Components installed with Health and Safety Environmental Management.

This table lists the optional applications that can be installed for additional features:

Optional applications for additional features in Health and Safety Environmental Management

Plugins	Description
Health and Safety Connector Core [com.sn_hs_connector_core]	Enables installation of external connector plugins such as the **Spoke for 3E** plugin.
Spoke for 3E [com.sn_hs_spoke_3e]	Enables integration with the 3E service provider to sync chemical, hazard, and related regulatory data into Health and Safety.
Health and Safety Chemical [com.sn_hs_chm]	Manages chemicals, requests, approvals, and regulatory information as part of the Health and Safety solution, including integration points to external providers like 3E.

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Optional applications for additional features in Health and Safety Environmental Management (continued)

Plugins	Description
Integrations professional [com.glide.hub.integrations.professional:sys]	Provides the IntegrationHub Professional capabilities required to connect to external systems such as 3E. This plugin is required to use the Spoke for 3E plugin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Health and Safety Environmental Management application (sn_hs_env) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you're displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure the chemical request approval flow

Modify the chemical request approval flow using Flow designer.

Before you begin

The approval flows are built on Flow Designer. Before modifying, make sure that you're familiar with the basics of ServiceNow® Workflow Studio.

Role required: Flow designer

About this task

Modifying the approval flow is an optional configuration step for a chemical request. The approval flow is ready to use but can be modified to meet your company's requirements.

If you decide to modify the flow, deactivate the original flow and make a copy. Make any desired changes to the new flow, and then activate it. Modifying the copy makes it easier when you must upgrade your ServiceNow® instance.

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Procedure

1. Navigate to **All** > **Process Automation** > **Flow designer**.
2. Select More actions ••• icon, then select **Copy flow**.
3. Enter a name for the new flow.
4. In the **Application** field, select **Chemical request approval**.
5. Select **Copy**.
6. Make desired changes to the new flow.
7. Select **Save** and then select **Activate**.

Configure the chemical request approver based on location

Configure approvers according to the location name entered on the request form. Multiple approvers can be associated with a single location.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System definition** > **Decision tables** and then select **Chemical request location approvers**.
2. Select **Create Draft** and select **Add new decision row** under the **Decision table**.
3. Under the **Chemical request** column, add the name of a location.
4. Under the **Approver** column, add the name of an approver for the new location.
5. Select **Save**.
6. Select **Publish** and then select **Publish** in the modal dialogue.

Result
The approver's name is selected for approving the chemical request, based on the location selected on the request.

Migrate SDS from chemical safety register to chemical item

Migrate your existing safety data sheets (SDS) from Chemical safety register to chemical item in Health and Safety Environmental Management.

Before you begin
Role required: sn_ohs_im.admin

About this task
When you install the Health and Safety Environmental Management, the SDS document attachment saved to the Chemical Safety Register (sn_hs_rm_safety_register_chemical) table migrates to the document (sn_ohs_im_document_v2) table.

The tool supports batch migration of up to 200 records at a time. After migration, all documents can be efficiently managed within the new list.

Procedure

1. Navigate to **All** > **Health and Safety** > **Standards and documentation (Deprecated)** > **Document migration**.
2. Select **Chemical item** and then select **Migrate 200 records**.

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The migration records and their migration status are listed in the **Migration records** list.

3. Repeat step 2 until you have migrated all existing document records.

Result

- The count of documents that have successfully migrated, documents pending migration, and failed migration are listed in the **Migrated records**, **Remaining records**, and **Fail records** widgets.
- The successfully migrated records appear appears under the **Document** related list of the respective **Chemical item** record.

Using Health and Safety Environmental Management

Learn how to use the Health and Safety Environmental Management application to manage and track chemicals for your organizations.

For an overview of chemical management and its benefits, see Chemical management overview.

Chemical management

Use the Health and Safety Environmental Management application to view the chemical library, raise chemical requests, and submit the requests for approvals.

View the chemical library as an employee

The chemical library is a centralized repository that lists all chemicals used or managed by an organization. Employees can access the chemical library through the Employee Center.

Before you begin
Role required: sn_hs_chm.requestor

Procedure

1. Navigate to **All** > **Self service** > **Employee Center**.
2. Select **Health and Safety** menu.
3. Under the **Quick links**, select **View chemical library**.

Result
The chemical library is displayed containing a list of chemicals, its manufacturer, approved locations, and the person responsible for maintaining that chemical.

What to do next
You can use the chemical library to search for chemicals by name or keyword, and access the chemical record. The chemical record lets you view detailed information, including chemical identity, ingredients, concentrations, hazard data, first aid, and related safety documents. For information on creating a chemical request, see Create a chemical request from the Employee Center.

Create a chemical request from the Employee Center

Employees can request a chemical available in the chemical library or initiate a request for a new chemical from the Employee Center.

Before you begin
Role required: sn_hs_chm.requestor

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Procedure

1. Navigate to **All** > **Self service** > **Employee Center**.
2. Select the **Health and Safety** menu.
3. To request a chemical,
   - **a.** Select the **Browse Health and Safety** button.
     b. Select **Request Chemical** card.
   - **a.** From the **Quick links**, select **View chemical library**.
     b. Select the **Request Chemical** button.
4. On the **Request Chemical** form, fill in the details.
   For field descriptions, see the Chemical request form.
5. Select **Save as draft** to complete the form later.
   The draft can be viewed in **My Requests**, under the **Drafts** tab.
6. Select **Submit**.

Result
The chemical request is submitted for approval by the chemical manager.

What to do next
The chemical request can be viewed under My Requests. You can open the chemical request record and view the following:

- The **Activity** tab displays any updates on the progress of the request.
- The **Details** tab shows all the information that you submitted through the form.
- The **Attachment** tab shows any documents attached to this request.

The approved or rejected chemical request can be viewed from the Employee Center under the **My Request** option. Select the **Submitted requests** related list and sort by **Closed requests**.

Submit a chemical request for approval

A chemical manager reviews a chemical request received from the employee and submits it for approval by the approver.

Before you begin
Role required: sn_hs_chm.manager or approver

About this task
The approver is selected based on the location entered in the chemical request. The approver is assigned for that location in the approval flow configuration. For more information on setting up the approval flow, see Configure the chemical request approver based on location. If no configuration exists for the selected location, the approver name defaults to the Chemical manager user for approval.

Procedure
1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the primary navigation, select **Environmental Management** ( ) icon.
3. Select a chemical request with the pending review status.
4. In the **Chemical requests** list, select **All**.

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5. In the **Details** tab, review the information provided by the chemical requester to ensure that it is correct and complete any missing details.
   For example, the **Manufacturer** field enables you to update the manufacturer name or use the **Attach file** option to attach a safety data sheet (SDS).
6. In the **Assigned to** field, select the approver.
   The names in the **Assigned to** field appears based on the approval flow that is configured for the location in the chemical request.
7. Select **Save**.
8. Select the **Submit for approval** button.

Result

- The approver list can be viewed in the **Approvers** tab of the chemical request record.
- The approver assigned to the chemical request can view this request under **My Tasks** in the Employee Center for approval.

Approve or reject a chemical request

The approver or the chemical manager can approve or reject the chemical request in the Employee Center.

Before you begin

Role required: sn_hs_chm.manager or approver

About this task

The approver can also choose to approve the chemical request from the Health and Safety Workspace. Open the record from the **Approvers** related list within the chemical request and select **Approved** in the **State** field.

Procedure

1. Navigate to **All** > **Self service** > **Employee Center**.
2. Select **My Tasks**.
3. View the **Approve request** record.
   You can view and verify the details of the request and choose to approve or reject a chemical request.
4. In the **Do you want to approve (chemical name)?** field, add comments if needed.
5. Select either the **Reject** or **Approve** button, depending on your decision regarding the chemical request.

Result

The status of the chemical request changes to Approved or Rejected based on the decision made.

What to do next

To view the state of the request as a chemical manager on the Health and Safety Workspace,

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the primary navigation, select **Environmental Management** ( ) icon.
3. In the **Chemical requests** list, select the **Approved** section.

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Create a chemical record for a new chemical

The chemical manager can create a chemical record for the new chemical request that has been approved.

Before you begin

Role required: sn_hs_chm.manager

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the primary navigation, select **Environmental Management** () icon.
3. In the **Chemical Requests** list, select the **Approved** tab and select a chemical request record.
4. In the **Details** related list of the chemical request, select the **Create chemical** button.
5. In the **Create chemical** form under the **Automatically** tab, the fields **Chemical name**, **Manufacturer**, and **Language** are automatically filled.
   - The fields are populated automatically because of the integration with the 3E database. If this configuration isn't done, the **Create chemical** form must be filled manually.
   - To create chemical manually, use the **Manually** tab, enter the **Chemical name** and then select **Submit**. On the **Create chemical** form, fill in the fields. For more information, see Chemical form.
6. In the **Country** field, select the name of the country.
   Enter the **Part number** that aligns with the 3E service providers if its available.
7. Select **Submit**.

Result

When the **Create chemical** form is,

- Submitted through the **Automatically** tab in the form, the chemical record is filled automatically and its related lists are pre populated with information from the 3E database.
- Submitted through the **Manually** tab in the form, the chemical record is created with the fields to be filled manually.

The **Chemical hazard identification**, **Chemical ingredients**, **Chemical ingredients**, **Chemical items**, **Risk assessments**, **Documents**, and **Service provider requests** tabs appear for this chemical record.

The new chemical record is added to the **Chemicals** list in the **Environmental Management** list view.

What to do next

To complete the chemical record manually,

- In the **Details** tab, fill in the form. For more information, see Chemical form.
- In the **Chemical hazard identification** tab, select **New**. In the **Chemical hazard identification** form, select the hazard category, hazard statements, and precautionary statements.
- In the **Chemical ingredients** tab, select **New** to add the name of the substance, its concentration, and function. For more information, see Chemical ingredient form. If the substance does not exists in the chemical ingredient form, select **Create substance** to create a record under the **Substance** list in the **Environmental Management** list view.
- In the **Chemical items** tab, update information about the chemical such as the responsible group, contact person, storage conditions. For more information, see Chemical item form.

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- In the **Risk assessments** tab, add existing risk assessments or select **New** to create risk assessment. For more information, see Risk assessment form.
- In the **Documents** tab, select **Add** to add existing Health and Safety documents or select **New** to create a Health and Safety document. For more information, see Add a new Health and Safety related document. The chemical safety data sheet can also be requested from this tab. For more information, see Request a safety data sheet (SDS).
- In the actions tab, select **New** to add any actions for the safety meeting. For more information, see Health and Safety action form
- The **Service provider requests** tab displays the requests submitted to the 3E service provider.

Note: The sync option can be used on any related list in a chemical record to obtain information from the 3 E database. For more info, see Sync chemical information with the 3E database.

Request a safety data sheet (SDS)

You can request a safety data sheet (SDS) from the chemical record to view the safety data for that chemical. The SDS can be downloaded in different languages.

Before you begin
Role required: sn_hs_chm.manager

About this task
To request SDS in different languages, the plugin 3E spoke (com.sn_hs_spoke_3e) must be installed.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the primary navigation, select **Environmental Management** ( ) icon.
3. Select the **Chemicals** list and then select **All**.
4. Select a chemical record.
5. Select the **Documents** related list of the chemical record.
6. Select the **Fetch SDS** button.
7. On the **Create safety data sheet (SDS) request** form, select the **Country** and the **Language**.
8. Select **Create**.

Result
The SDS is requested from the service provider. The SDS request is displayed in the **Service provider requests** related list of the chemical record. The document is added to the **Documents** related list when the response is received from the service provider.

Health and Safety Environmental Management reference

Using the reference topics, learn about the components, such as the roles, tables, plugins, and store applications that are installed when you install the Health and Safety Environmental Management application. Reference topics also provide additional information about the lists and forms that you use to configure and use Health and Safety Environmental Management.

Components installed with Health and Safety Environmental Management

Several types of components are installed with activation of the Health and Safety Environmental Management plugin, including tables, user roles, and scheduled jobs.

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Store applications installed

Store applications installed with Health and Safety Environmental Management

Store application	Description
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.
Health and Safety Risk Management	Installs the Health and Safety Risk Management application. For more information on store applications, roles, and tables installed with Health and Safety Risk Management, see Components installed with Health and Safety Risk Management

Roles installed

Roles installed with Health and Safety Environmental Management

Role title [name]	Description	Contains roles
Admin [sn_hs_env.admin]	Administrator for Health and Safety Environmental Management	sn_hs_chm.manager
Chemical manager [sn_hs_chm.manager]	Can read, create, write, and delete access to all chemical records	• sn_hs_chm.writer • sn_hs_chm.reader
Chemical requestor [sn_hs_chm.requestor]	Can create chemical requests from the Employee Center	sn_ohs_im.document_reader
Chemical reader [sn_hs_chm.reader]	Can view all chemical records	• sn_ohs_im.document_reader • sn_hs_rm.safety_register_reader • sn_ohs_im.action_reader • sn_ohs_im.hs_profile_reader

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Roles installed with Health and Safety Environmental Management (continued)

Role title [name]	Description	Contains roles
Chemical writer [sn_hs_chm.writer]	Can create, write, and delete access to all chemical records	• sn_ohs_im.action_writer • sn_ohs_im.document_writer • sn_hs_rm.safety_register_writer
Chemical sensitive content user [sn_hs_chm.sensitive_content_user]	Can access sensitive chemical records	None
Connector admin [sn_hs_connector_co.admin]	Administrator for Connector Core application. Can manage connections with external applications or plugins.	sn_hs_connector_co.user
Connector core user [sn_hs_connector_co.user]	Can read, create, write, and view connector plugins.	None

Tables installed

Tables installed with Health and Safety Environmental Management

Table	Description
Chemical [sn_hs_chm_chemical]	Stores information about each chemical, including hazard identification, ingredients (with concentrations), related documents (such as safety data sheets), and location-specific chemical items.
Chemical first aid [sn_hs_chm_chemical_first_aid]	Stores information about the first aid measures for a chemical exposure.
Chemical group [sn_hs_chm_chemical_group]	Stores details about multiple chemicals that can be grouped.

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Tables installed with Health and Safety Environmental Management (continued)

Table	Description
Chemical ingredient [sn_hs_chm_chemical_ingredient]	Contains information defining how much of each chemical substance is included in the chemical.
Chemical request [sn_hs_chm_chemical_request]	Stores data obtained from the chemical request. It includes details such as chemical name, SDS attachment, usage details, quantity, and location.
Chemical substance [sn_hs_chm_chemical_substance]	Stores data about individual components or materials that make up the ingredients of a chemical.
Chemical hazard category [sn_hs_chm_hazard_category]	Stores categories for chemical hazards.
Chemical hazard class [sn_hs_chm_hazard_class]	Stores class for chemical hazards.
Chemical hazard identification [sn_hs_chm_hazard_identification]	Stores data based on Globally Harmonized System (GHS)
Chemical hazard statement [sn_hs_chm_hazard_statement]	Statements that describe the hazards that are associated with the chemical.
M2M chemical group action [sn_hs_chm_m2m_chemical_group_action]	Tables that connects chemicals with the actions list.
M2M chemical group risk assessment [sn_hs_chm_m2m_chemical_group_risk_assessment]	Table that connects chemical group to risk assessments.
Chemical item [sn_hs_rm_safety_register_chemical]	Stores details about specific physical containers or instances.
Chemical precautionary statement [sn_hs_chm_precautionary_statement]	Stores data based on Globally Harmonized System (GHS)

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Tables installed with Health and Safety Environmental Management (continued)

Table	Description
Statement [sn_hs_chm_statement]	Additional statements that can be added. Extends from the chemical hazard statement table and the chemical precautionary statement table.
Service provider request [sn_hs_connector_core_service_provider_request]	Stores records of data requested from the 3E system.

Chemical request form

Field and description for a chemical request form. The chemical request form is used by an employee to request for an existing or a new chemical.

Chemical request form

Field	Description
Select Chemicals	Lists the names of existing chemicals
New Chemical check box	Option to request a chemical that is not in the existing list
New Chemical	Name of the chemical that is not in the existing list **Note:** This field appears when New chemical check box is selected
Upload	Button to upload a Safety Data Sheet (SDS), if available
Approvals due	Date on which approval is needed
Location	Name of the location the chemical will be used in
Cost Center	Department in your organization that pays for the chemical request
Usage Details	
Describe how the chemical will be used	Description on the use of the chemical

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Chemical request form (continued)

Field	Description
Purpose	Options to select the purpose of the chemical request
Container Type	Type of container holding the chemical
Frequency of Use	Determines how often a chemical will be used.
General period of use	Period when the chemical will be in use
Start date of use	Specific start date for the use of chemical
End date of use	Specific end date for the use of chemical
Volume details	
Physical state	Physical state of the chemical For example, If the chemical is Gasoline, the physical state is Liquid.
Overall Expected consumption	Value and unit of chemical consumption
Overall Quantity	Total quantity required by the organization
Quantity unit of measure	Unit of measure for the quantity
Additional Details	
Risk assessment	Option to associate a risk assessment Use the (ⓘ) icon to preview the risk assessment record
JSA	Option to associate a job safety analysis (JSA) Use the (ⓘ) icon to preview the JSA record
Additional information	Description of additional information relevant to the chemical request
Attachment	Any additional documents to be attached for the chemical request.

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Chemical form

Field description for a chemical form that the chemical manager uses to create a chemical by manually completing the form.

Chemical form

Field	Description
Chemical	
Name	Name of the new chemical.
Active	Option to make the chemical record available for use.
Chemical group	Name of the chemical group this chemical belongs to.
Common name	Name that is commonly used for the chemical.
Synonyms	Alternate names if available for the chemical.
External ID	Obtained from the 3E database or the manufacturer.
Manufacturer	Name of the manufacturer for the chemical.
Emergency phone	Contact number to be used during an emergency.
Responsible group	Group responsible for the chemical.
Part number	Part number of the chemical that aligns with the part number in 3E database.
Physical state	Option to select the physical state of the chemical, which could be solid, liquid, or gaseous.
Responsible person	Individual responsible for the chemical.
Approved locations	Locations where the chemical is approved to be stored or used.
Cost centers	Department in the organization from where the cost for the chemical is approved.
Intended use	Activity the chemical is used for.
Additional information	Description of additional information relevant to the chemical request.
Sensitive	Option to mark the record as containing sensitive information. Only users with the sensitive role can view this record.
Hazard information	
NFPA health hazard rating	Numerical rating (0-4) from the National Fire Protection Association that indicates how dangerous a chemical is to human health. 0 means normal material with no hazard, while 4 means a substance that can be lethal even with brief exposure.

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Chemical form (continued)

Field	Description
	Note: NFPA (National Fire Protection Association) is primarily used by emergency responders. It is a standardized labeling system used in North America.
NFPA instability / reactivity hazard rating	Numerical rating (0-4) that indicates how easily a chemical can explode or undergo dangerous chemical reactions. 0 means the substance is normally stable, while 4 means it can readily explode at normal temperatures and pressures. **Note:** NFPA (National Fire Protection Association) is primarily used by emergency responders. It is a standardized labeling system used in North America.
HMIS health hazard rating	Numerical rating (0-4) from the Hazardous Materials Identification System that indicates health risks from chemical exposure. Similar to NFPA but specifically designed for workplace safety programs. 0 means minimal hazard, while 4 means severe hazard that can cause death or major injury. **Note:** HMIS (Hazardous Materials Identification System) is designed for workplace or facility use. HMIS is a standardized labeling system used in North America.
HMIS instability / reactivity hazard rating	Numerical rating (0-4) that shows how unstable or reactive a chemical is under normal conditions. 0 means the chemical is stable, while 4 means it can explode or polymerize violently. **Note:** HMIS (Hazardous Materials Identification System) is designed for workplace or facility use. HMIS is a standardized labeling system used in North America.
NFPA flammability hazard rating	Numerical rating (0-4) indicating how easily a substance can catch fire. 0 means materials that won't burn under normal conditions, while 4 means extremely flammable gases or very volatile liquids.

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Chemical form (continued)

Field	Description
	Note: NFPA (National Fire Protection Association) is primarily used by emergency responders. It is a standardized labeling system used in North America.
NFPA special hazards	Special symbols that indicate unusual hazards not covered by the numerical ratings. Common symbols include "W" (reacts dangerously with water), "OXY" (oxidizer), and "COR" (corrosive). **Note:** NFPA (National Fire Protection Association) is primarily used by emergency responders. It is a standardized labeling system used in North America.
HMIS flammability hazard rating	Numerical rating (0-4) showing fire hazard levels in workplace settings. 0 means materials that won't burn, while 4 means extremely flammable materials. **Note:** HMIS (Hazardous Materials Identification System) is designed for workplace or facility use. HMIS is a standardized labeling system used in North America.
HMIS personal protection	Letter code that indicates what personal protective equipment (PPE) workers should wear when handling the chemical. For example, in our provided choice list "B" means safety glasses and gloves, and "H" means full face shield, apron, and gloves. **Note:** HMIS (Hazardous Materials Identification System) is designed for workplace or facility use. HMIS is a standardized labeling system used in North America.
HMIS chronic health hazard	Indicator that flags chemicals causing long-term health effects from repeated exposure, such as cancer, organ damage, or reproductive harm. This is separate from immediate/acute hazards.

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Chemical form (continued)

Field	Description
	Note: HMIS (Hazardous Materials Identification System) is designed for workplace or facility use. HMIS is a standardized labeling system used in North America.
Locale settings	
Primary country	Country where the chemical record fields and associated information is requested from the 3E database.
Primary language	Language in which the chemical record fields and associated information is requested from the 3E database.
Properties	
Odor	Qualitative description of the detectable smell of the chemical under normal conditions. For example: Odorless, pungent, or sweet.
ph	Measure of the acidity or alkalinity of the chemical.
Melting point (°C)	Temperature in Celsius at which the chemical transitions from solid to liquid state.
Melting point (°F)	Temperature in Fahrenheit at which the chemical transitions from solid to liquid state.
Flash point (°C)	Lowest temperature in Celsius at which the chemical produces enough vapor to ignite.
Flash point (°F)	Lowest temperature in Fahrenheit at which the chemical produces enough vapor to ignite.
Boiling point (°C)	Temperature in Celsius at which the chemical transitions from liquid to vapor state.
Boiling point (°F)	Temperature in Fahrenheit at which the chemical transitions from liquid to vapor state.
Boiling point range	Temperature range over which the chemical transitions from liquid to vapor state.
Vapor density	Measure of how heavy the chemical's vapor is relative to air.
Vapor pressure	Force exerted by the chemical's vapor on its surroundings at a given temperature.
Vapor pressure unit	Unit of measurement used to express the chemical's vapor pressure value.
Dynamic viscosity	Measure of the chemical's resistance to flow under applied force.

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Chemical form (continued)

Field	Description
Dynamic viscosity unit	Unit of measurement used to express the chemical's dynamic viscosity value.
Lower explosive limit (LEL)(%)	Minimum vapor concentration in air, expressed as a percentage, at which the chemical can ignite.
Upper explosive limit (UEL)(%)	Maximum vapor concentration in air, expressed as a percentage, at which the chemical can ignite.
Density	Mass of the chemical per unit volume at a specified temperature.
Density unit	Unit of measurement used to express the chemical's density value.
Solubility	Degree to which the chemical dissolves in a solvent, typically water.
Specific gravity	Ratio of the chemical's density to the density of a reference substance, typically water.
Molecular weight (g/mol)	Combined atomic mass of all atoms in one molecule of the chemical, expressed in grams per mole.
Percent volatile (%)	Percentage of the chemical's composition that evaporates under standard conditions.
Auto ignition temperature (°C)	Lowest temperature in Celsius at which the chemical ignites spontaneously without an external ignition source.
Auto ignition temperature (°F)	Lowest temperature in Fahrenheit at which the chemical ignites spontaneously without an external ignition source.
Additional comments (customer visible)	Supplementary notes about the chemical's physical properties visible to customers.
Work Notes	Notes about the chemical.

Chemical ingredient form

The field description for the chemical ingredient form is as follows.

Chemical ingredient form

Field	Description
Substance	Name of the chemical substance.
CAS number	CAS (Chemical Abstracts Service) number for the substance.
Concentration %	Specific concentration of the chemical ingredient in the chemical.

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Chemical ingredient form (continued)

Field	Description
Concentration min	Minimum concentration of the ingredient in the chemical mixture.
Concentration max	Maximum concentration of the ingredient in the chemical mixture.
Function	Function of the chemical ingredient in the chemical mixture.
Additional information	Additional information related to the chemical ingredient.

Chemical item form

The chemical manager uses the chemical item form to add a new chemical item record. The field and its descriptions are as follows.

Chemical item form

Field	Description
Chemical item	
Number	System-generated record number.
Active	Option to make the chemical record available for use.
Short Description	Brief description about the chemical item.
Location	Location where the chemical item is used.
Date last reviewed	Date the chemical item was last reviewed.
Review date	Date of next review.
Description	Detailed description of the review.
Contact details	
Company	Name of the company that has the chemical item.
Responsible group	The group responsible for the chemical item.
Contact person	Name of the person to be contacted for emergencies regarding the chemical item.
Responsible person	Name of the person responsible for the chemical item.
Chemical information	
Storage condition	Condition in which the chemical is stored.
Max allowed quantity	Maximum quantity allowed to be stored.
Issue date	Date the chemical will be issued.
Quantity	Quantity of the chemical.
Review date	Date of next chemical review

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Chemical item form (continued)

Field	Description
Date last reviewed	Date the chemical was last reviewed.
Expiry date	Date after which the chemical must not be used.
Additional comments	Additional comments relevant to the chemical.
Work notes	Any work notes relevant to the chemical.

Integration of Health and Safety applications with third-party services

Extend the capabilities of the Health and Safety applications by integrating it with other third-party systems.

Integration of 3E with Health and Safety Environmental Management

Enables you by reducing manual effort in obtaining data, improving data accuracy, and streamlining workflows. This integration promotes easier access and management of information in one unified environment.

3E service provider overview

3E Protect is an external API service that provides access to a vast database of chemical metadata and Safety Data Sheets (SDS).

It's integrated into the health and safety system through a dedicated connector plugin, enabling organizations to retrieve and update chemical safety information automatically for their chemical records.

The service functions by enabling you to import or add new chemicals to the system, after which 3E service provider supplies detailed hazard identification, ingredient data, and SDS documents in multiple languages. If a chemical isn't found in the 3E database, an obtainment process is triggered, where 3E staff actively source the required SDS from manufacturers.

The applications **Spoke for 3E** (com.sn_hs_spoke_3e) and **Health and Safety Connector Core** (com.sn_hs_connector_core) are the optional plugins that can be installed to use this feature. For more information, see Components installed with Health and Safety Environmental Management.

Benefits

With 3E service provider integration you can obtain the following benefits:

- Manage large inventories of hazardous chemical
- Maintain regulatory conformance and up-to-date safety documentation
- Automate the population of safety data
- Ensure their records are always current
- Reduce manual effort, improve accuracy, and streamline compliance processes

Configure the application registry for the 3E Service Provider

Configure 3E integration with Health and Safety Environmental Management to retrieve current chemical data.

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Before you begin

Verify that you have received the API credentials to integrate 3E database with Health and Safety Environmental Management. 3E service provider supplies these credentials to the organizations that have an account with them.

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Search and select **3E SDS provider**.
3. From the application scope notification, select **here** to edit the registry record.
4. In the **Client ID** and **Client secret field**, enter the credentials provided by 3E service provider. These credentials are unique to your account with 3E service provider.
5. Select **Update**.

Configure the property for 3E integration

Configure the property that enables retrieving safety data sheets, SOP's and other metadata from the 3E database to the chemical library. This property enables users to have the necessary safety information before they use the chemical.

Before you begin

Role required: sn_hs_env.admin

About this task

The [sn_hs_connector_co.3e_source] property value is the unique identifier for your organization in the 3E system. It must be set accurately to confirm correct data retrieval. Before configuring integration, confirm that your organization has purchased or acquired the 3E web services API license. This license provides the value to be entered in this field to access 3E APIs. These credentials enable secure communication between your application and the 3E database.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the **3E API call require ''Source'' as mandatory field to be passed to API to unique identify client account. Default value is set to ''CS''** field, enter the unique identifier value for your organization.
   The value entered here acts as the customer system identifier from 3E.
3. Select **Save**.

Sync chemical information with the 3E database

You can sync details of chemicals, such as hazard identification, chemical ingredients, and others, with the 3E database to verify that current information is accessible.

Before you begin

The 3E credentials must be configured in the application registry for the sync with the service provider to process successfully. For more information, see Configure the application registry for the 3E Service Provider.

Role required: admin

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Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety Workspace**.
2. In the primary navigation, select **Environmental Management** () icon.
3. In the **Chemical** list, select **All** and the select a chemical record.
4. On any of the related lists, select the **More actions** () icon.
5. Select **Sync with service provider**.
6. In the dialogue box, select the **Confirm** button.

Result

The **Service provider requests** related list of the chemical record, displays the request submitted to sync the record with 3E with the status as **Work in progress**.

What to do next

- Depending on the request, the data from 3E can be instantly available or it can take up to 30 days to obtain. When the data is available, the service provider request will be marked as **Complete** by 3E. Once the request is completed by 3E service provider, the fields in the record are automatically updated.
- If there are any error or status message from 3E system (for example, for synchronization issues), the error message is added to the activity stream of the service provider request. If 3E service provider cannot locate the chemical data or metadata, the 3E staff manually intervenes and send messages that appear in the activity stream.

Mobile experience for Health and Safety

Enable your employees to submit health and safety incidents and observations, Job safety analyses (JSAs), access safety knowledge base, and more on their mobile device using the ServiceNow mobile applications.

Employees can use the Now Mobile app to do the following tasks at any time using their mobile device:

- Submit safety incidents and observations online or offline
- Submit safety related questions and compensation claims
- Submit Job safety analyses
- Take safety inspection and audit surveys
- View safety register documents such as Safety Data Sheets (SDSs)
- Access company's health and safety knowledge base

Safety inspectors and auditors can use the Mobile Agent app to conduct surveys offline.

These apps run on the ServiceNow mobile platform. You can download these mobile apps for the iOS platform from the Apple App Store or for the Android platform from the Google Play Store.

Offline mode for mobile

Use the offline mode of the Mobile Agent and the Now Mobile app to work in areas without an internet connection. You can turn on the offline mode and complete your tasks. Once you go online, the changes are all synchronized automatically. For more information, see Offline mode.

To turn on offline mode on your mobile, do the following:

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- Navigate to **Settings**.
- Tap **Download Cache**.
- Enable the **Offline Mode** option.

Tip: To schedule a periodic download of cache, configure the *glide.sg.offline.scheduled_download.enabled* system property on your instance. For more information, see Configure offline mode behavior.

Health and Safety Incident Management on an Android device

Configure mobile apps to access Health and Safety applications

Configure the ServiceNow mobile apps to access Health and Safety applications for submitting safety incidents, observations, and job safety analyses (JSAs).

Before you begin

Ensure that the ServiceNow instance to be configured on Now Mobile app and Mobile Agent app has the following applications installed with the demo data:

- Health and Safety Incident Management for submitting safety incidents and observations.

  Note: The demo data for Health and Safety Incident Management includes the launcher required to open it in the Now Mobile app.

- Health and Safety Risk Management to submit JSAs, view safety registers, and conduct inspection and audit surveys.

Role required: none

Procedure

1. Download the following mobile apps for the iOS platform from the Apple App Store or for the Android platform from the Google Play Store.
   - Now Mobile app for submitting safety incidents, observations, and JSAs, and viewing safety register documents.

     For more information on using this mobile app, see Now Mobile app.
   - ServiceNow Agent mobile app for conducting inspection and audit surveys offline.

     For more information on using this mobile app, see Mobile Agent app app.
2. Open the Now Mobile app or Mobile Agent app and tap the plus icon (**+**).
3. Add your ServiceNow instance by entering the instance address.
4. **Optional:** In the **Enter nickname** field, enter an alias for quickly identifying the instance.
5. Tap **Save and login**.
6. Log in to your instance.

Result

- For an instance with the Health and Safety Incident Management application, the **Safety** option appears in the navigation bar of the Now Mobile app in your mobile device. This option enables you to access the Health and Safety Incident Management application through the mobile device.

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Note: The **Safety** option appears only if the demo data is installed with the Health and Safety Incident Management on the configured ServiceNow instance.

- For an instance with the Health and Safety Risk Management application, the **Create a job safety analysis** quick link appears in the **Home** tab of the Now Mobile app in your mobile device.

Add Health and Safety launcher tab to Now Mobile app configuration

Add a Health and Safety launcher screen tab to your Now Mobile app configuration. With this launcher tab, your employees can open the Health and Safety Incident Management application in the Now Mobile app on their mobile device.

Before you begin

Role required: sn_ohs_im.admin and admin

About this task

- Use this procedure only if the demo data isn't included in the Health and Safety Incident Management application on your ServiceNow instance that needs to be configured on the Now Mobile app.

  The demo data for this application includes the launcher required to open it in the Now Mobile app.

- The Now Mobile app is built using ServiceNow Mobile App Builder, so make sure you're familiar with the Mobile App Builder basics.

For more information about configuring a tab on the navigation bar of Now Mobile app, see Configure the navigation bar and navigation tabs.

Procedure

1. Navigate to **All** > **System Mobile** > **Mobile App Builder**.
2. In the application scope selection screen, select the application scope as **Health and Safety Incident Management**.
3. Select **All mobile records** in the left menu.
4. From the Record type list, select **Launcher tab [sys_sg_applet_launcher_tab]**, and then select **New**.
   The new launcher tab screen appears where you can create a tab for Health and Safety.
5. On the form, fill in the fields.

Launcher tab form

Field	Description
Label	Name that displays for your navigation bar tab. For Health and Safety, enter `Safety`.
Active	Toggle that sets whether the navigation bar tab is active. Inactive navigation bar tabs aren't visible.
Launcher	Launcher screen that appears when you tap the tab.

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Field	Description
	Click **Choose** and select **OHS Launcher**.
Icon	Icon that displays for your navigation tab.

6. Select **Save**.

Configure offline mode in the Now Mobile app for Health and Safety

Setup offline mode in the Now Mobile app for Health and Safety so that users can access it even without an internet connection.

Before you begin

Ensure that the application scope is selected as Now Mobile. For more information, see Application picker.

Role required: admin

Procedure

1. Enable offline mode for the Now Mobile app so that the users can access it even when they're not connected to the internet.
   a. Navigate to **All** > **System Mobile** > **Mobile branding** > **Mobile App Configs**.
   b. Select **Now Mobile**.
   c. Select the **Offline enabled** option to turn on the offline mode.
   d. Select **Update**.
2. Make the Now Mobile Home page available for offline use in Health and Safety.
   a. Navigate to **All** > **System Mobile** > **Mobile App Builder**.
   The Mobile App Builder opens in a new browser tab and displays the application scope selection screen.
   b. Search for the Health and Safety application scope and then select the name of the application scope.
   To enable offline mode for safety incidents and observations, select Health and Safety Incident Management.
   c. Select **Mobile app configs**, and then select the **Now Mobile** to configure offline mode in it.
   d. If the scope is not set as Now Mobile, select **Edit in original scope**.
   e. Under **Home**, select **Homepage** and then select **Open record**.
   f. Turn on the **Available offline** option.
   g. Select **Save**.

Submit a safety incident or observation through the Now Mobile app

Submit a safety incident or observation to report it your organization's safety department.

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Before you begin
Role required: sn_ohs_im.requestor

Procedure
1. Open the Now Mobile app on your mobile device.
2. In the navigation bar, tap **Safety**.
3. In the **Browse from all topics** section on the page, tap a topic to open category items.
   - To report an incident, tap **Safety incident** and then tap **Report Health and Safety Incident**.
   - To report an observation, tap **Observations** and then tap **Report Health and Safety Observation**.
4. Fill in the fields.
5. Tap **Submit**.
   A confirmation message with the incident or observation number appears on the screen.
6. **Optional:** Tap the incident or observation number to review it or update any fields.
7. Tap **Close** to return to the list of safety topics.

Report a safety incident or observation in the offline mode

Report a safety incident or observation in the offline mode-without an internet connection-through the Now Mobile app. Once you go online, the incidents or observations reported offline are synchronized automatically.

Before you begin
Verify the following conditions:

- The system properties for the offline mode behavior of the mobile application are configured. For more information, see Configure offline mode behavior.
- The Health and Safety Incident Management application is configured for offline mobile. For more information, see Configure offline mode in the Now Mobile app for Health and Safety.
- The offline mode for the Now Mobile app on your mobile device is turned on. For more information, see Offline mode for mobile.
- The *glide.sg.offline.scheduled_download.enabled* system property for scheduled offline caching is set. If the property is not set, manually update cache before you go offline. To update cache, navigate to **Settings** and tap **Update Cache**.

Role required: none

About this task
For information on how the offline mode works in the mobile app, see Offline mode for mobile.

Procedure
1. Open the Now Mobile app on your mobile device.
2. In the navigation bar, tap **Home**.
3. In the **Quick links** section on the page, select an option.
   - To report a basic incident, tap **Report safety incident**.
   - To report an observation, tap **Report safety observation**.
4. Fill in the fields and tap **Submit**.

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5. **Optional:** To review the reported incident or observation, open it from the **My items** section on the page.
   - To view an incident, tap **My H&S incidents** and then tap the incident number.
   - To view an observation, tap **My H&S observations** and then tap the observation number.

Access safety knowledge articles through the Now Mobile app

Access your company's health and safety knowledge base on your mobile device using the ServiceNow Now Mobile app.

Before you begin

Role required: sn_ohs_im.requestor

Procedure

1. Open the Now Mobile app on your mobile device.
2. In the navigation bar, tap **Safety**.
3. Open the required knowledge article from one of these areas on the page.
   - In the **Browse from all topics** section on the page, tap **Safety knowledge articles** and then tap the required knowledge article.
   - In the **Safety knowledge articles** section on the page, tap the required knowledge article.

Submit a JSA through the Now Mobile app

Submit a job safety analysis (JSA) to identify hazards related to your job and identify control measures that should be in place at your point-of-work.

Before you begin

Role required: sn_hs_rm.jsa_reporter

Procedure

1. Open the Now Mobile app on your mobile device.
2. Create a JSA.

Option	Steps
From Home tab	**a.** In the navigation bar, tap **Home**. **b.** In the **Quick links** section on the page, tap **Create a job safety analysis**.
From Support tab	**a.** In the navigation bar, tap **Support**. **b.** In the **Browse from all topics** section on the page, tap **Health and Safety** and then tap **Job safety analysis**.
From a previously submitted JSA	To reuse a JSA that you submitted previously to save time: **a.** In the navigation bar, tap **Support**. **b.** In the **Browse from all topics** section on the page, tap **Health and Safety**.

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Option	Steps
	c. Under the **Quick links** section on the page, tap **View my JSAs**. **d.** In the list, open the JSA that you want to copy. **e.** Tap **Copy**. A JSA form with values copied from the previ ous JSA opens.

3. Fill in the fields.
   For more information on JSA field descriptions, see JSA form.
4. Tap **Submit**.
   A confirmation message with a link to open the JSA appears on the screen.
5. **Optional:** Tap the link to open and review the JSA.

Result

- The JSA is submitted for your job or task. To view your submitted JSAs, navigate to the **My items** section on the **Home** page, tap **My job safety analyses**, and then tap the required JSA.
- The JSA is also listed in the JSAs list on Health and Safety Workspace. A risk manager [sn_hs_rm.jsa_manager] can view all the filed JSAs by navigating to the Health and Safety Workspace and selecting the risk management icon ( ) and then selecting the **JSAs** list.

View a safety register document in the Now Mobile app

View safety register documents for hazardous material on your mobile device using the ServiceNow Now Mobile app.

Before you begin
Role required: none

About this task
All Safety Data Sheets (SDSs) that are added to the safety registers through the Health and Safety Workspace are available to view in the Now Mobile app. Employees can access these SDSs for their safety when working with any potentially hazardous materials.

Procedure

1. Open the Now Mobile app on your mobile device.
2. In the navigation bar, tap **Home**.
3. In the **Quick links** section on the page, tap **Safety register documents**.
4. In the list, tap the material to view its SDS.

   Tip: You can narrow down the list using the **Register type** and **Location** filters. Alternatively, enter the name of the chemical in the search bar.

   A safety admin can configure the search criteria in the Now Mobile app to help find the information quickly. For more information, see Configure search criteria.

   The safety register document associated with the hazardous material shows.
5. Tap the safety register document to open it.

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Manage Health and Safety incident using the Mobile Agent app

As a safety agent, you can create or manage a safety incident using the Mobile Agent app.

The Mobile Agent app is useful to safety agents who are desk-less workers and must create or update incident records on the site.

Note: The safety incidents created or modified using the desktop workspace can be viewed on the Mobile Agent app.

The mobile experiences on Mobile Agent app for safety incidents available for safety agents and managers are:

Create or modify a safety incident on the Mobile Agent app

A safety agent can create or edit a safety incident through the Mobile Agent app.

Before you begin

Role required: sn_ohs_im.agent or sn_ohs_im.manager

About this task

Easily create safety incident records. Assign the new incident records to yourself or to a safety agent from the assigned groups. On the Mobile Agent app, add more details, such as hazards and watch-lists, if necessary. Use the activity stream for each related list to view the activity for that incident record.

Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. Tap **Safety incidents** icon ( ) from the quick links section.
   Opens the **All safety incidents list** page where you can view the list of safety incidents.
4. To modify an existing safety incident,
   - Swipe left on the safety incident record to view the edit option.
   - Open the safety incident record and tap **More options** icon .
5. To add a new safety incident,
   a. Tap **Create new incident** on the **All safety incidents list** page.
   b. On the form, fill in the details.
   c. Select **Submit**.

   To update the related list, see,
   - Create or modify root cause analysis of a safety incident on the Mobile Agent app
   - Create or modify actions of a safety incident on the Mobile Agent app
   - Create or modify the people involved for a safety incident on the Mobile Agent app
   - Create or modify injury and illness record of a safety incident on the Mobile Agent app

Create or modify injury and illness record of a safety incident on the Mobile Agent app

Log an injury or illness that resulted from a health and safety incident for each person affected during the incident on the Mobile Agent app.

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Before you begin

Role required: sn_ohs_im.manager, sn_ohs_im.agent

Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. Tap the **Safety incidents** icon ( ) from the quick links section.
4. Open a safety incident record.
5. Tap the **Related lists** tab and then tap **Injury and illness**.
   a. To modify an existing injury and illness record,
      - Swipe left on the injury and illness record to view the edit and delete options.
      - Open the injury and illness record and tap **More options** icon , then tap edit or delete.
   b. To add a new injury and illness record, tap **Add new injured person**.
6. On the form, fill in the details.
   For more details on field description, see Injury and illness fields.
7. Tap **Submit**.
8. To add injured body parts, open an injured persons record in the **Injury and illness** related list of a safety incident.
   a. Tap **Add new injured body part**.
   b. On the form, fill in the fields.

Injured body part from

Field	Description
Severity	Seriousness of the injury ▪ None- No injury present. ▪ Minor- Mild injury that needs minimal or no treatment. ▪ Moderate- Noticeable injury such as deep cuts, moderate sprain, minor fracture that may limit activity temporarily. Medical intervention may be required but not life threatening. ▪ Severe- Serious injury such as major fractures, head trauma, deep lacerations that impacts function or is potentially life-threatening. Requires urgent medical intervention.
Region	Region of the body where the injury occurred.

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Field	Description
Body part	Part of the body where the injury is.
Description	Detailed description of the injury or illness.

9. Tap **Submit**.

Create or modify the people involved for a safety incident on the Mobile Agent app

Add a person involved or modify the information of an existing person involved in a safety incident using the Mobile Agent app.

Before you begin

Role required: sn_ohs_im.manager, sn_ohs_im.agent

Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. Tap the **Safety incidents** icon ( ) from the quick links section.
4. Open a safety incident record.
5. Tap the **Related lists** tab and then tap **People involved**.
   a. To modify an existing people involved record,
      - Swipe left on the people involved record to view the edit and delete options.
      - Open the people involved record and tap **More options** icon , then tap edit or delete.
   b. To add a new people involved record, tap **Add new people involved**.
6. On the form, fill in the details.
   For more details on field description, see Inspection schedule form.
7. Tap **Submit**.

Create or modify root cause analysis of a safety incident on the Mobile Agent app

As an agent or a manager, create or edit a root cause analysis on-site using the Mobile Agent app.

Before you begin

Role required: sn_ohs_im.manager, sn_ohs_im.agent

Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. Tap the **Safety incidents** icon ( ) from the quick links section.
4. Open a safety incident record.
5. Tap the **Related lists** tab and then tap **Root cause analysis**.

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a. To modify an existing root cause analysis record,
   - Swipe left on the root cause analysis record to view the edit and delete options.
   - Open the root cause analysis record and tap **More options** icon then tap edit or delete.

b. To add a new root cause analysis record, tap **Add new root cause analysis**.

6. On the form, fill in the details.
   For more details on the Five why's technique of root cause analysis, see Perform root cause analysis for a safety incident.
7. Tap **Submit**.

Create or modify actions of a safety incident on the Mobile Agent app

Add an action to address the root causes of the safety incident. You can add multiple actions for the incident.

Before you begin
Role required: sn_ohs_im.manager or sn_ohs_im.agent

Procedure
1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. Tap the **Safety incidents** icon ( ) from the quick links section.
4. Open a safety incident record.
5. Tap the **Related lists** tab and then tap **Actions**.

a. To modify an existing actions record,
   - Swipe left on the actions record to view the edit and delete options.
   - Open the actions record and tap **More options** icon , and then tap edit or delete.

b. To add a new action record, tap **Add new action**.

6. On the form, fill in the details.
   For more details on field description, see Health and Safety action form.
7. Tap **Submit**.

Manage safety inspections and audits through the mobile apps

Use the Mobile Agent or the Now Mobile app apps to manage Health and Safety inspections and audits.

Create and manage a safety inspection in Mobile Agent app

Create a safety inspection using the Mobile Agent app without scheduling an inspection to manage your workplace inspection.

Before you begin
Role required: sn_hs_rm.safety_inspection_writer

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About this task

Easily create new inspection records. Assign these inspection records to yourself or to a safety agent from the assigned groups. From an inspection record open and complete a related survey that is assigned to you. Add new findings or actions to the findings as necessary on the Mobile Agent app.

Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. Select **My inspections** from the quick links to open a list of inspections.
4. Select **Create new inspection** to add a new inspection.
   Alternatively, edit or delete the existing inspection record as needed from the **Details** tab of the inspection record.
5. On the form fill, in the details.
   For more information for field description, see Inspection schedule form.
6. Select **Submit**.

   For more information on managing a safety inspection, see Create and manage a safety inspection

Manage the smart assessment for safety inspections and audits from mobile app

Use the Mobile Agent app to create and manage smart assessments for safety inspections and audits as an agent. You can also partially save the smart assessment questionnaire in the offline mode.

To access smart assessment, the user's role must match or contain the role specified in the **Assessment reader role** field. This field is configured with the [sn_smart_asmt.assessment_reader] role in the smart assessment template. For more information, see Configure the smart assessment template for safety inspections and audits.

Complete a smart assessment for a safety inspection or audit through the Mobile agent app

Use the Mobile Agent app to complete a smart assessment questionnaire for Health and Safety inspection or audit as an agent.

Before you begin

When the agent logs in to the Mobile Agent app, they can view the notification for the newly assigned smart assessment.

Role required: sn_hs_rm.safety_inspection_writer or sn_hs_rm.safety_audit_writer

Note: To perform this task, the role must match or contain the role specified in the **Assessment reader role** field. This field is set during the smart assessment template configuration. For more information, see Configure the smart assessment template for safety inspections and audits.

Procedure

1. Tap the Home icon ( ).
2. Select **See all** for the **Smart assessment** section.
3. Tap the smart assessment record.
4. Complete the questionnaire.

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- Tap **Next** to complete all sections of the questionnaire.
- If the questionnaire is long or if more information is needed, tap the **Partial save** icon () to save the partially filled questionnaire and complete it later.
- You can also create actions or findings for each question in the smart assessment questionnaire. For more information, see Create actions or findings for the smart assessment questionnaire.

5. Tap on the **Submit** button.

Create actions or findings for the smart assessment questionnaire

You can create actions or findings for every question in the smart assessment questionnaire. For example, to report a hazard observed while completing the smart assessment questionnaire.

Before you begin

Role required: sn_hs_rm.safety_inspection_writer or sn_hs_rm.safety_audit_writer

Note: To perform this task, the role must match or contain the role specified in the **Assessment reader role** field. This field is set during the smart assessment template configuration. For more information, see Configure the smart assessment template for safety inspections and audits.

About this task

The actions or finding that are created for the inspections and audits through the Mobile Agent app gets synced with the workspace.

Procedure

1. Tap the Home icon ().
2. Select **See all** for the **Smart assessment** section.
3. Tap the smart assessment record.
4. Tap the More actions () icon.
5. Tap **Actions list**
6. Tap the More actions () icon on the **Assessment actions list** page.
7. Tap the **Create action** button.
8. Complete the **Action input** form.
9. Tap the **Submit** button.

Result

The action record appears in the **Assessment actions list** page and is synced with the workspace.

View the smart assessment result using the Mobile agent app

You can view the smart assessment that was completed as part of the safety inspection or audit.

Before you begin

Role required: sn_hs_rm.safety_inspection_writer

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Note: To perform this task, the role must match or contain the role specified in the **Assessment reader role** field. This field is set during the smart assessment template configuration. For more information, see Configure the smart assessment template for safety inspections and audits.

Procedure

1. Tap the Home icon ().
2. Select **See all** for the **Inspections** or **Audits** section.
3. Tap the inspection or audit record.
4. Tap the **Smart assessment results** button.
5. Select **Next** to view all the sections of the assessment.
6. Select **Close**.

Assign smart assessment through Mobile agent app

You can assign the smart assessment for an inspection or an audit to yourself if you belong to the same assignment group.

Before you begin

Role required: sn_hs_rm.safety_inspection_writer or sn_hs_rm.safety_audit_writer

Note: To perform this task, the role must match or contain the role specified in the **Assessment reader role** field. This field is set during the smart assessment template configuration. For more information, see Configure the smart assessment template for safety inspections and audits.

About this task

- The smart assessment can be assigned only when it was previously assigned to another safety agent or manager.
- This option is available only when you're part of the same assignment group as the agent or manager to whom the inspection or audit was originally assigned.

Procedure

1. Tap the Home icon ().
2. Select **See all** for the **Inspections** or **Audits** section.
3. Tap the inspection or audit record.
4. Tap the **Assign to me** button.
5. Tap **Yes** in the dialogue box to confirm.

Result

- The inspection or the audit gets assigned to you.
- The smart assessment associated with the inspection also gets assigned to you.

What to do next

You can tap **Take assessment** to start the smart assessment. If the smart assessment questionnaire was partially completed by the previous safety agent, you can complete the rest of the questionnaire.

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Manage the safety inspection and audit surveys through mobile app

Learn how to set up and manage safety inspections and audits using the Mobile Agent app.

The Mobile Agent app can be used by safety managers to configure and by safety agents to manage the Health and Safety safety inspections and audits.

Use the Now Mobile app to manage the Health and Safety inspections and audits in offline mode.

Configure the create action check box for safety inspection survey in the Mobile Agent app

Determine the survey field types that should display the **Create action** option when inspection agents complete the survey in the Mobile Agent app.

Before you begin

Verify that the application scope is selected as Health and Safety Incident Management. For more information, see Application picker.

Role required: admin

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and Safety administration** > **Properties**.
2. In the property *Survey fields enabled for action creation* add the values, such as, `checkbox,boolean,choice,long,percentage,scale,numericscale` to determine whether a specific survey field should display the **Create action** check box. `checkbox,boolean,choice,long,percentage,scale,numericscale,imagescale,strin` `multiplecheckboxranking,reference` is set as the default value for this property.
3. Select **Save**.

Result

The **Create action** check box is added to the type of the survey field mentioned in the property.

Complete a safety inspection or audit survey in the offline mode

Complete a safety inspection or audit survey assigned to you in the offline mode-without an internet connection- through the Mobile Agent app.

Before you begin

Verify the following conditions:

- The system properties for the offline mode behavior of the mobile application are configured. For more information, see Configure offline mode behavior.
- The offline mode for the Mobile Agent app on your mobile device is turned on. For more information, see Offline mode for mobile.
- The *glide.sg.offline.scheduled_download.enabled* system property for scheduled offline caching is set. If the property is not set, manually update cache before you go offline. To update cache, navigate to **Settings** and tap **Update Cache**. This ensures that the survey is downloaded and it's ready for you to complete.

Role required: none

About this task

Surveys completed offline are synchronized once an internet connection is established.

For more information on how offline mode works in the mobile app, see Offline mode for mobile.

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Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. In the **My Actions** section on the page, tap **My Assessments and Surveys**.
   All surveys that were downloaded before you went offline are listed.
4. In the list, tap the inspection or audit survey that you want to complete.
5. Conduct a safety walk and fill in the survey.
6. Tap **Submit**.

Add actions for safety inspections survey in Mobile Agent app

Learn how to use the Mobile Agent app to create actions for an inspection survey in online or offline mode.

Before you begin

Verify the following conditions:

- The system properties for the offline mode behavior of the mobile application are configured. For more information, see Configure offline mode behavior.
- The offline mode for the Mobile Agent app on your mobile device is turned on. For more information, see Offline mode for Mobile Agent.
- The *glide.sg.offline.scheduled_download.enabled* system property for scheduled offline caching is set. If the property is not set, manually update cache before you go offline. To update cache, navigate to **Settings** and tap **Update Cache**. This ensures that the survey is downloaded and it's ready for you to complete.

Role required: sn_hs_rm.safety_inspection_agent

About this task

Surveys completed offline are synchronized once an internet connection is established.

For more information on how offline mode works in the mobile app, see Offline mode for mobile.

For more information on how an admin configures which survey field type should display the **Create action** check box, see Configure the create action check box for safety inspection survey in the Mobile Agent app.

Procedure

1. Open the Mobile Agent app on your mobile device.
2. In the navigation bar, tap **Home**.
3. To open surveys,

Section	Steps
My Surveys	Tap **My Assessments and Surveys**. All surveys that were downloaded before you went offline are listed.

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Section	Steps
Inspections	**a.** Tap **See all** or select the inspection record visible on the page. **b.** Tap the inspection record and select **Open inspection record**. **c.** Tap **Open inspection survey**.

4. In the list, tap the inspection survey that you want to complete.
5. Conduct a safety walk and fill in the survey.

   To add actions for survey responses perform the following steps:

   a. Select the **Create action** check box for responses to the questions for which you want to add the action.
   b. Add the **Short description**, **Type**, and **Due date**.
   c. In the **Assigned to** field, enter the name of the agent the survey should be assigned to.
6. Tap **Submit**.

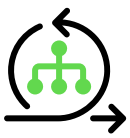
Result

The action created appears in the **Actions** tab of the inspection record and can be edited or deleted by using the More actions ( ) icon.

Now Assist for Health and Safety

Use the ServiceNow® Now Assist for Health and Safety application to summarize a health and safety incident. You can enable your safety agent and safety manager to generate concise, informative flash reports that can be quickly shared with relevant stakeholders.

Get started

Explore	Configure	Use
		
Learn more about Now Assist for Health and Safety	Configure the Now Assist for Health and Safety application to get started	Use generative AI capabilities offered by Now Assist for Health and Safety

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Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence.
- Search the Known Error Portal for known error articles.
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information about safety incidents including incident details, actions, and root cause analysis. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Health and Safety

With the Now Assist for Health and Safety application, safety agents and managers can use generative AI to summarize the safety incidents.

Skills

The Now Assist for Health and Safety application includes the skills and features of generative AI to support safety teams working on resolving safety issues.

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Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

Use the following skill provided by the Now Assist for Health and Safety application.

Health and safety incident summarization

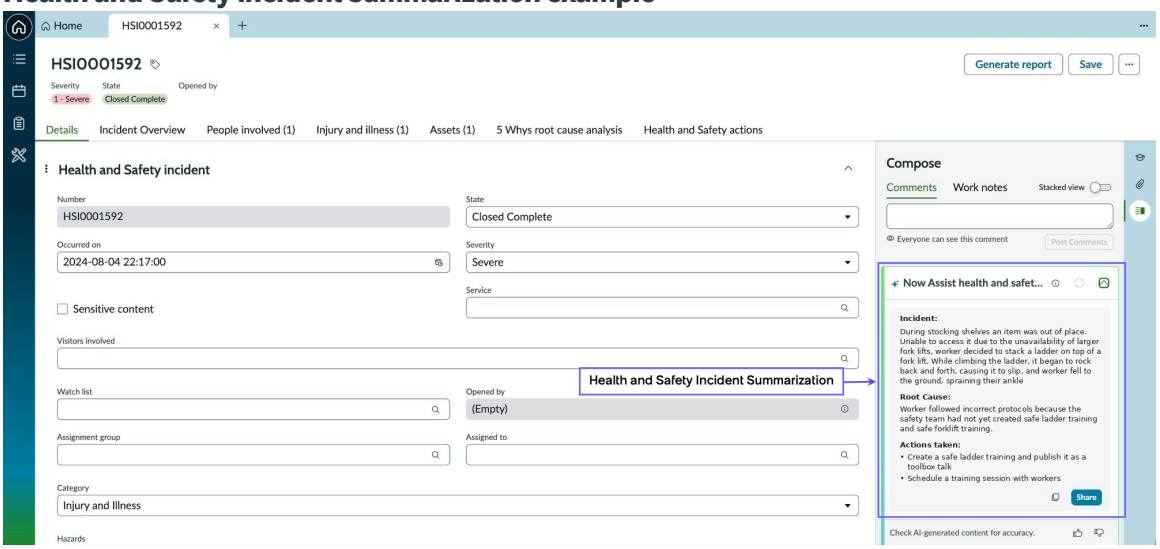
Provides a summary of safety incidents including incident details, actions, and root cause analysis. The safety team can view a summary to understand the context, refresh the summary, and post the summary to the work notes.

The summary is displayed above the activity stream and includes the information that the safety agents enter in the following fields:

- Short description
- Description
- Sequence of events
- Root Cause
- Action

The following example shows an AI-generated incident summary.

Health and Safety incident summarization example



For information on activating the Health and Safety incident summarization skill, see Configuring Now Assist for Health and Safety. For information on how to use this skill on Health and Safety Workspace, see Summarize a safety incident by using Now Assist for Health and Safety.

Supporting information for Now Assist for Health and Safety

Get a quick overview of the important information that is related to the Now Assist for Health and Safety application.

Supported versions

Now Assist for Health and Safety is supported starting with the Xanadu release.

Supported user interfaces

The Now Assist for Health and Safety application includes the skills that are listed in the following table.

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Now Assist for Health and Safety supported interfaces

Interface	Skill
Health and Safety Workspace	Health and Safety incident summarization
Core UI	Health and Safety incident summarization

Application information

Activate the Now Assist for Health and Safety store app (sn_hs_gen_ai) to use the Health and Safety incident summarization skills.

This store app has a dependency on Health and Safety Incident Management (sn_ohs_im).

Activate the applications in the following order:

1. Health and Safety Incident Management
2. Now Assist for Health and Safety

For more information, see Configuring Now Assist for Health and Safety.

Explore Now Assist AI agents for Health and Safety

Now Assist AI agents help to improve live agent productivity by using AI agents to perform tasks.

AI agents for Health and Safety help to create actions using the Now Assist panel.

- For more information, see Explore Now Assist AI agents.
- To learn how to manage AI agents and agentic workflows, see AI Agent Studio.

Configuring Now Assist for Health and Safety

Configure the Now Assist for Health and Safety application.

Configuration overview

Install Now Assist for Health and Safety

If you have the admin role, you can install the Now Assist for Health and Safety application (sn_hs_gen_ai) to enable generative AI capabilities for summarizing safety incidents on your instance.

Before you begin

Role required: admin

About this task

Use the Now Assist Admin console to install and configure Now Assist for Health and Safety. This console contains everything that you need to install the plugins and configure the generative AI skills. For additional information, see Now Assist Admin console.

The following table lists the skill that you can access from the Now Assist Admin console.

Health and Safety feature and skill in the Now Assist Admin console

Health and Safety feature	Skill
Now Assist skills for Health and Safety	Health and Safety incident summarization

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Procedure

Install the Now Assist for Health and Safety (sn_hs_gen_ai) plugin.

- For information about the plugin dependencies and plugin activation order, see Supporting information for Now Assist for Health and Safety.
- For information about the installation process, see Install Now Assist plugins.

What to do next

Activate the skill to enable the safety team to use the generative AI skills. For more information, see Activate a Now Assist for Health and Safety skill.

Activate a Now Assist for Health and Safety skill

Activate a Now Assist for Health and Safety skill to enable the safety team to use the generative AI skills from Health and Safety Workspace and the Core UI.

Before you begin

Install Now Assist for Health and Safety.

Role required: admin

About this task

The following table lists the skill that you can access from the Now Assist Admin console.

Health and Safety feature and skill in the Now Assist Admin console

Health and Safety feature	Skill
Now Assist skills for Health and Safety	Health and Safety incident summarization

The Health and Safety incident summarization skill is available in the base system with the required configurations.

Note:

Now LLM Service is currently the only provider for this Now Assist application's skills.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. From the workflow list, select **Employee** and then select **Health and Safety**.
3. On the tile for your skill, select **Activate skill**.
4. In the General details section, review the details and select **Save and continue**.
5. In the Choose Input section, review inputs for the selected skill.

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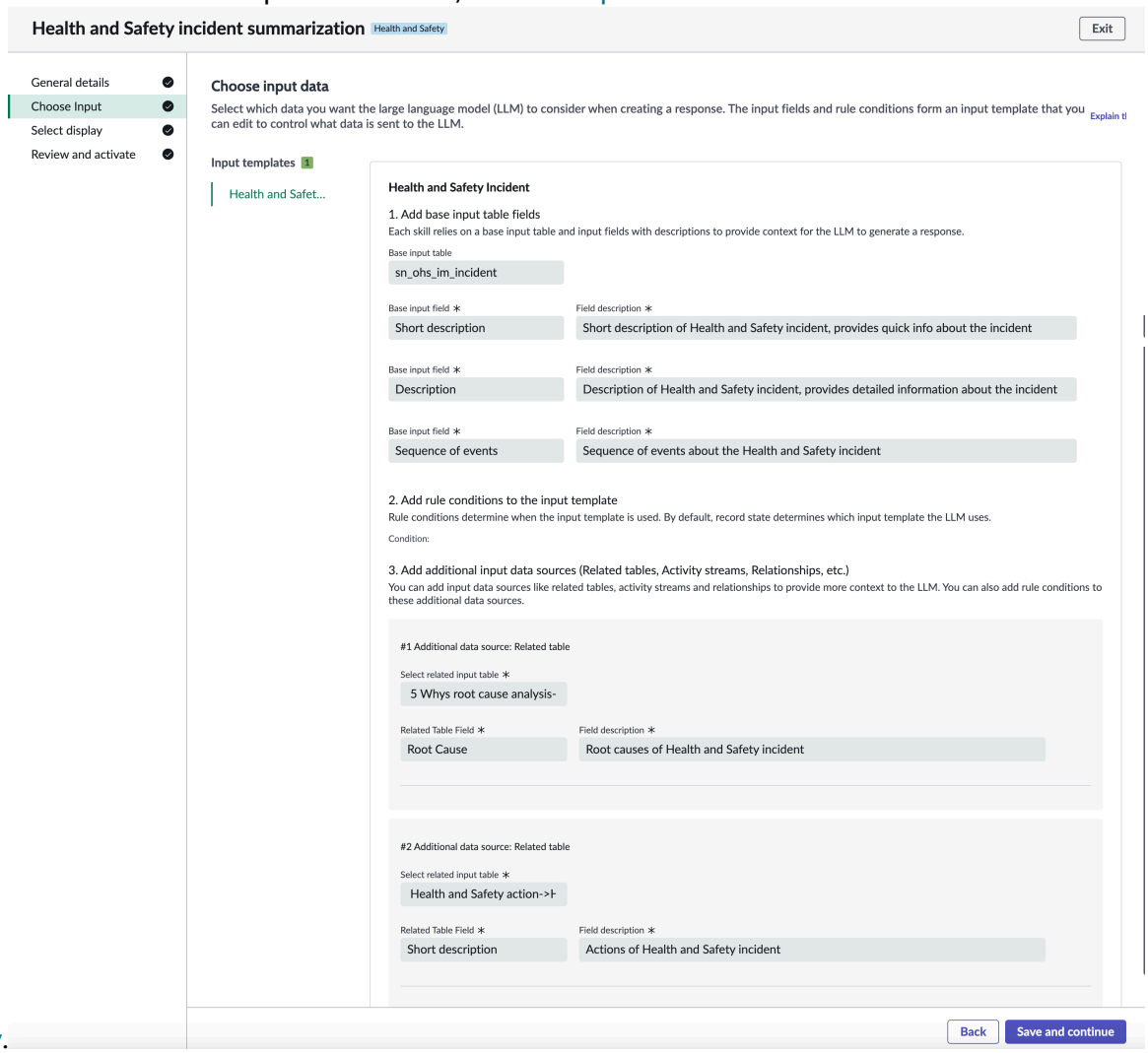
For information about the inputs for the skill, see Skill inputs for Now Assist for Health and Safety.



6. Select **Save and continue** to go to the next step.
7. In the Select display section, review the interfaces where the skill appears.
   - **In-product**: When selected, the Now Assist skills are displayed on workspaces.

     For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

   - **Now Assist panel**: When selected, Now Assist skills are available in the Now Assist panel. If you don't see this option, you must activate the Now Assist panel. For more information, see Turn on the Now Assist panel.

     For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.
8. Select **Save and continue**.
9. In the Review and activate section, review your choices and select **Activate** to complete the configuration.
   The skill is configured.

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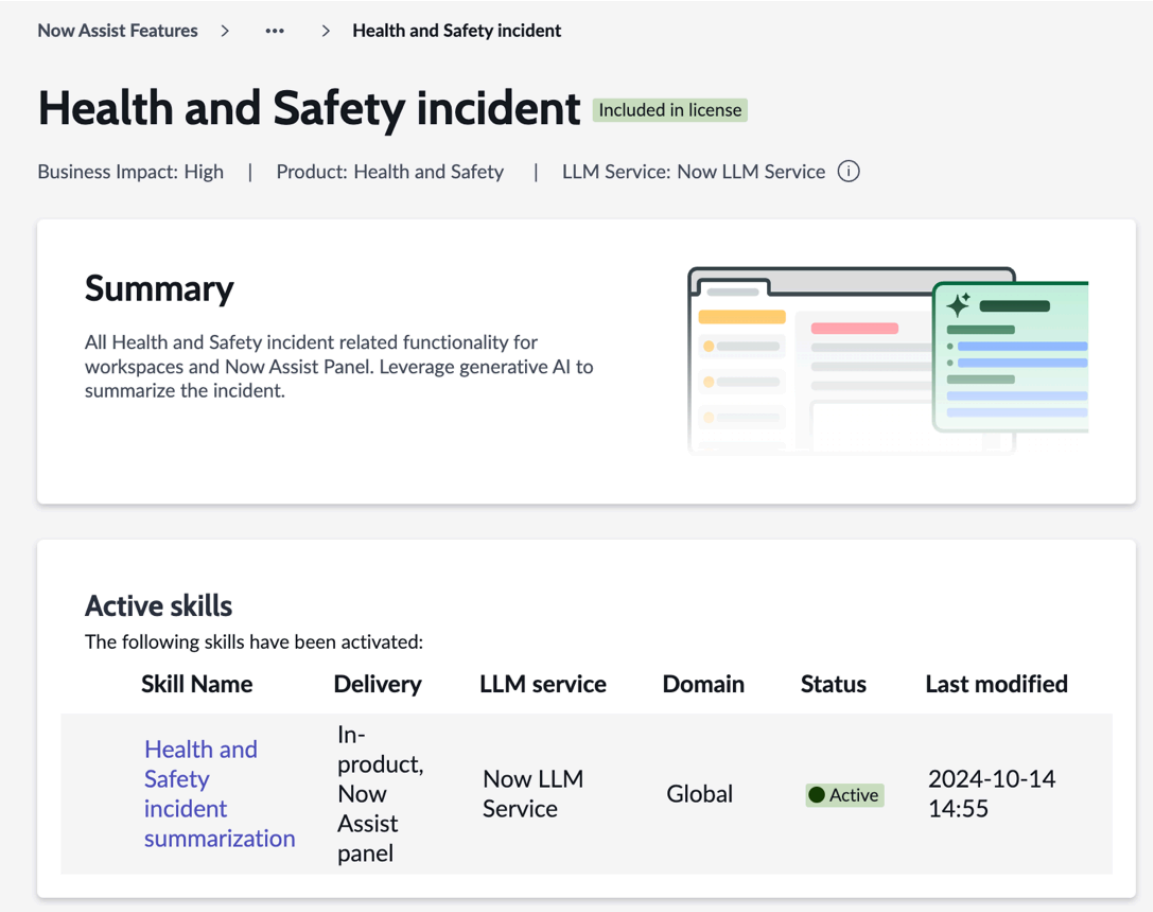
10. In the Active skills section of the Health and Safety page, verify that the skill is active from the Status column.

Active skills section



Skill inputs for Now Assist for Health and Safety

Get a quick overview of the skill inputs for Now Assist for Health and Safety.

Overview of skill inputs

An input identifies the data that is used for a skill, such as the table and fields that are used to generate a summary.

Health and Safety incident summarization skill

The Health and Safety incident summarization skill includes inputs that identify the table and fields that are used when a summary is generated.

Note: These fields are read-only.

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Inputs for the summarization of Health and Safety incident

Input table	Input fields
Health and Safety incident [sn_ohs_im_incident]	• Short description • Description • Sequence of events
5 Whys root cause analysis [sn_ohs_im_rca_five_whys]	Root Cause
Health and Safety action [sn_ohs_im_action]	Short description

Configure Now Assist AI agents for Health and Safety

Learn how to configure Now Assist AI agents to execute agentic workflows with AI agents and mapped tools.

- To learn more about configuring the Now Assist AI agents, see Configure Now Assist AI agents.
- To learn about reducing the exposure of harmful content on your agentic workflow, see Enable Now Assist Guardian for AI agents.
- To choose the large language model (LLM) service provider for Now Assist AI agents in AI Agent Studio, see Large language models on the ServiceNow AI Platform®.

Install Now Assist AI agents for Health and Safety

Install Now Assist AI agents on your ServiceNow instance to enable the agentic AI experience.

Before you begin

To get started with AI agents, you must have:

- A ServiceNow Pro Plus or Enterprise Plus license.
- An instance on Xanadu Patch 7+ or Yokohama.
- AI Search enabled on your instance.

Role required: sn_aia_admin

About this task

AI agents are not standalone applications that you can install directly. To enable AI agents on your instance, you must install and activate Now Assist for Health and Safety.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for and select the Now Assist for Health and Safety application.
3. Select **Install**.

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Result
The AI Agent for Health and safety [sn_hs_ai_agents] plugin associated with the Now Assist for Health and Safety application is installed on your instance.

What to do next
To access AI agents in the Now Assist panel, you must enable the panel. See Turn on the Now Assist panel.

Configure conversational AI

Learn how to configure conversational AI for Health and Safety incidents and observations.

Configure Now Assist in virtual agent for Conversational AI Health and Safety Incident Report

An admin can configure the default Now Assist in Virtual Agent assistants and the default Now Assist panel assistants (Platform). Configuring the assistants enables the Now Assist panel on the **Employee Center** and the Health and Safety workspace.

Before you begin
Role required: admin

About this task
1. Enable AI Search to provide consumer-grade search experiences for your users.

   For more information, see Configuring AI Search.
2. Install the Now Assist for platform [sn_genai_platform] to enable Now Assist for the workspace.
3. Install the Health and Safety Incident Management [sn_hs_im_incident] plugin.

   For more information, see Install Health and Safety Incident Management
4. For detailed information about configuring Now Assist in Virtual agent, see Configuring assistants overview.

Procedure
1. To turn on the Now Assist panel, see Turn on the Now Assist panel.
   The **CI Admin console** opens the **Assistants** page that shows the two assistants.
   - Now Assist in Virtual Agent (default)
   - Now Assist panel assistants (Platform)
2. Select the **More options** icon (⋮) for **Now Assist in Virtual Agent (default)**
3. Select **Turn on/off**, to turn on the assistant.
   Select **Setup** in the pop-up dialogue.
4. Select **Save and continue** on the **Overview** tab.
5. On the **Now Assist skills** tab, select the check box for **Custom skills** under the **Skill name** column.
6. Select **Save and continue**
7. For **Display experience** select, **Add portal** drop-down in the **Portal tab** and then select **Employee Center**.
8. Select **Save and continue**
9. Select **Save and continue** for the **Information sources** and **Branding** tab.
10. On the **Chat experiences** tab, select the check box for **Document uploads** and then select **Save and continue**.

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11. Review the assistant and select **Done**.
    The Now Assist in Virtual Agent assistant shows the status as on.

Result
The Now Assist panel is enabled for the Employee center.

Configure keywords for conversational AI

Configure keywords on the incident and observation record producers to enable conversational Health and Safety reporting in the Now Assist panel.

Before you begin
Verify that the application scope is selected as Health and Safety Core. For more information, see Application picker.

Role required: sn_ohs_im.admin

About this task
The keywords for the incident or observation record for conversation AI are the relevant tags used to generate a response in the Now Assist panel. The keywords must be added as a comma-separated list of words.

Procedure
1. Navigate to **All** > **Service Catalog** > **Catalog definitions** > **Record producers**.
2. In the record producers list, select:
   - **Report Health and Safety Incident-Basic** for incident records.
   - **Report Health and Safety Observations** for observation records.
   For more information on how to use record producers, see Record Producer.
3. In the **Meta** field, add keywords.
   A few examples of keywords can be health, safety, incident, injury, or observation.
4. Select **Update**.

Result
The keywords are saved to the record producer. Employees can use these keywords in the Now Assist panel to trigger conversational reporting for Health and Safety incidents or observations.

Configure incident patterns

Learn how to configure Health and Safety incident patterns.

Configure the generation of incident patterns

Configure the scheduled jobs that generate the incident patterns from the safety incident records to run at a particular interval or time.

Before you begin
Verify that the application scope is selected as Health and Safety Core. For more information, see Application picker.

Role required: sn_ohs_im.admin

About this task
The scheduled jobs to generate the incident patterns run by default when you have the Health and Safety Incident Management application and the generative AI [com.snc.sn_hs_gen_ai] plugin installed. These jobs can be configured to start or end on a particular date or time as required.

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Procedure

1. Navigate to **All** > **System definition** > **Scheduled jobs**.
2. Search and open the jobs:
   - HS pattern detection: data cleaning
   - HS pattern detection: incident data preprocessing
   - HS pattern detection: pattern generation
3. Define how the schedule job should repeat from the **Run**, **Time zone**, and **Time** fields. For more information, see Advanced options for scheduled jobs.
4. Select **Update**.

Note: To run the job and update metrics on demand, select **Execute Now**.

Configure the inclusion of sensitive data in incident patterns

Configure whether safety incident records with sensitive data should be included in the incident pattern analysis.

Before you begin

Role required: sn_ohs_im.admin

About this task

The configuration of this option in the application property decides whether incident pattern jobs running in the background should include safety incident records that contain sensitive data. Configure this setting if needed before running the incident pattern analysis.

Procedure

1. Navigate to **All** > **Health and Safety** > **Health and safety administration** > **Properties**.
2. In the **Control whether sensitive incidents are included in the pattern detection analysis** field, select
   - Yes, to include the incident records with sensitive data in the analysis.
   - No, to exclude incident records with sensitive date in the analysis.
3. Select **Save**.

Using Now Assist for Health and Safety

If you have a safety agent or manager role, you can summarize the safety incidents with the Now Assist for Health and Safety application.

Summarize a safety incident by using Now Assist for Health and Safety

Generate a summary from the fields that you selected on the safety incident and quickly understand the incident context by using the Health and Safety incident summarization skill in the Now Assist for Health and Safety application.

Before you begin

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Verify that the Health and Safety incident summarization skill is enabled. For more information, see Activate a Now Assist for Health and Safety skill.

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Role required: sn_ohs_im.agent or sn_ohs_im.manager

About this task

The Health and Safety incident summarization skill provides the summary of Health and Safety incidents including the details, actions taken, and root cause analysis. The safety agent and safety manager can view a summary to understand the context, refresh the summary, and post the summary to the work notes.

The incident summarization skill is available in Health and Safety Workspace and in the Core UI. When this skill is enabled on an instance, the Now Assist icon ( ) appears in the workspace.

- In Health and Safety Workspace, use the Health and Safety incident summary by Now Assist component to generate a summary. This component appears above the activity stream.

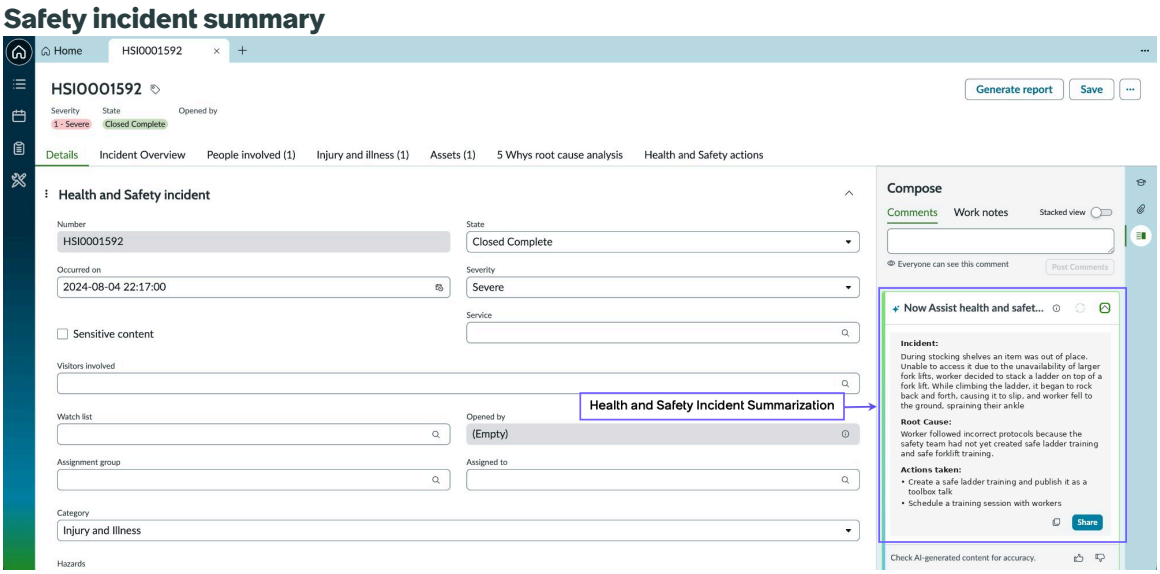
  Note: You can also generate a summary on demand from the Now Assist panel. For more information, see Standard chat.

- In the Core UI, select the **Summarize** button on the incident record to generate a summary.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and open a safety incident.
2. Select **Activity** to open the activity stream.
3. In the Health and Safety incident summary by Health and Safety component, select **Summarize**.

   Note: Generating and displaying the summary may take several seconds.



4. **Optional:** When you're finished summarizing an incident, you can add it to the incident work notes, expand or collapse it, provide feedback, copy it, or view information about the incident.

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Option	Procedure
Save the summary information by adding it to the work notes	**a.** Select **Share as work notes**. **b.** In the Share to work notes dialog box, edit the summary. **c.** Select **Save to work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the case summary	Select the copy to clipboard icon ( ) to use the case summary information for another purpose, such as pasting into an email.
Refresh the summary	Select the refresh icon ( ) to summarize the request again.
View the information about the case summary	If you want to check details about the summary, select the more info icon ( ).

5. **Optional:** Share the AI-generated summary with relevant stakeholders through the **Email** tab in the activity stream.
   The **Email** tab appears only when the following conditions are met:
   - The email client is enabled for the Health and Safety incident [sn_ohs_im_incident] table on your ServiceNow instance. For more information, see Enable the email client for a table.
   - The user sending the email has the Email composer [email_composer] role. For more information, see Email composer [email_composer].

Use generative AI skills

Use the integration of generative AI with Health and Safety Incident Management to summarize incident patterns.

The generative AI skills can be used with Health and Safety Incident Management when com.snc.sn_hs_gen_ai plugin is installed.

Incident pattern analysis

The incident pattern analysis tool automatically detects recurring patterns across health and safety incidents.

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The tool compares the patterns across the list of incident records based on category, location, time, people involved, and assets. The tool runs jobs in the background, automatically creating Health and Safety pattern records on the **Incident pattern** dashboard. No manual intervention from a safety manager is required. The integration of the incident pattern analysis tool with generative AI helps to generate a pattern summary.

Safety managers can view the pattern dashboard and immediately plan and act on emerging risks.

Benefits

- Runs on a configurable schedule, automatically analyzing incident data with no manual input required.
- Generates AI summaries, confidence scores, and recommend corrective actions when the generative AI plugin is installed.
- Manages large volumes of incident records and identifies recurring patterns.
- Enables safety managers to use the Now Assist panel to chat about a pattern, explore related incidents, and get help drafting actions.

Analyze safety incident patterns

The **Incident patterns** tab of the Health and Safety dashboard provides safety managers with an automated, real-time overview of the recurring patterns across their safety incident data.

The tab is designed to help the safety teams quickly understand where risks are clustering and how serious they are.

Prerequisites

- Verify that the Health and Safety Incident Management application is installed. For more information, see Health and Safety Incident Management.
- Verify that the generative AI [com.snc.sn_hs_gen_ai] plugin is installed.
- Configure the inclusion of incident records that contain sensitive data. For more information, see Configure the inclusion of sensitive data in incident patterns.
- Verify that all the jobs are running. For more information on configuring the interval at which these jobs run, see Configure the generation of incident patterns.

Role required

- sn_ohs_im.manager and sn_ohs_im.agent roles are needed to view the dashboard.
- sn_ohs_im.admin to edit the dashboard.
- ui_builder_admin, to edit the dashboard visualizations that are built using the UI Builder.

Access the Health and Safety incident pattern dashboard

Navigate to **Workspaces** > **Health and safety Workspaces** and select the **Incident pattern** tab on the Health and Safety dashboard.

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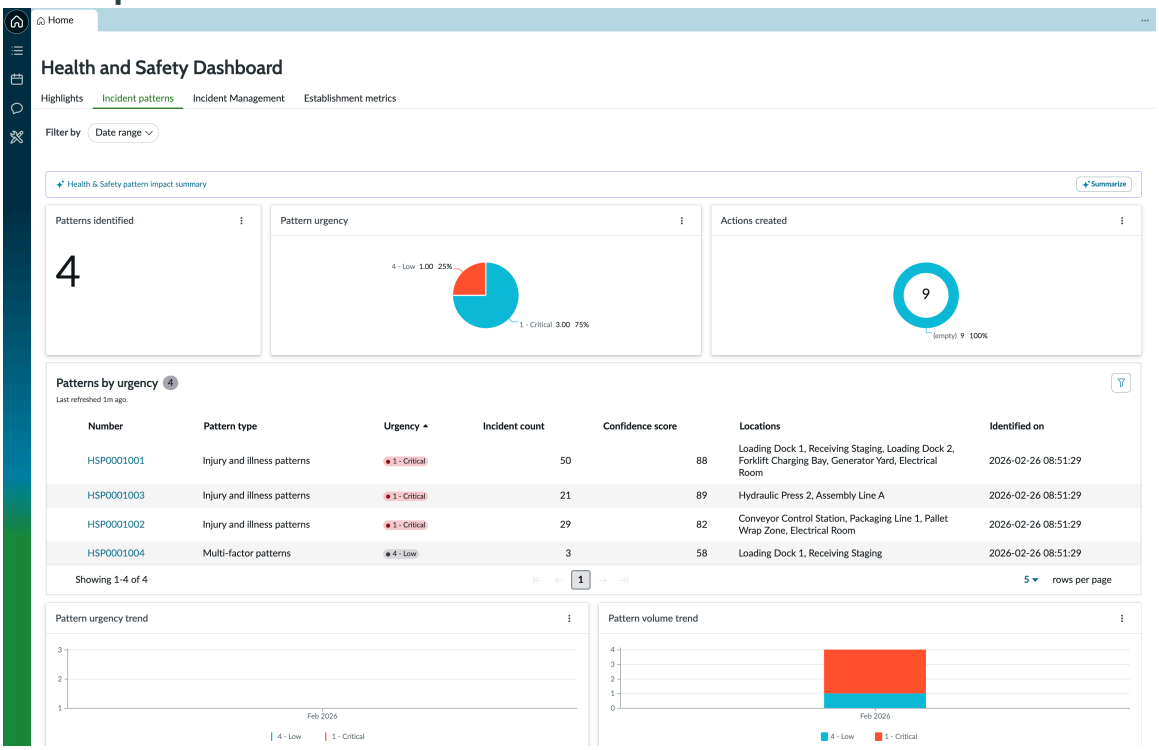
Incident pattern dashboard



Metrics on the incident pattern tab

Users can view the metrics on the dashboard if they have the Health and Safety Incident Management and the generative AI plugin installed.

Cards on the incident pattern tabs

Cards	Description
Health and safety pattern impact summary (banner)	AI-generated summary that analyzes all current pattern records and produces a consolidated overview of the most significant risk drivers across the organization.
Patterns identified	Total number of incident patterns detected in the most recent analysis run.
Pattern urgency	Breakdown of all identified patterns by their urgency classification. Each segment represents an urgency level, showing both the count and the percentage share.
Actions created	Count of corrective actions generated from identified patterns.
Patterns by urgency	Detailed table listing all identified patterns that are sorted by urgency. Select individual pattern record from the list to triage.

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Cards on the incident pattern tabs (continued)

Cards	Description
Pattern urgency trend	Month-by-month view of how patterns at each level have changed over time.
Pattern volume trend	Monthly snapshot of the total number of patterns identified and stacked by urgency level.

Customizing widgets

You can customize the widgets in the dashboard to display relevant metrics by using the UI Builder. For more information, see UI Builder tutorial.

Work on an incident pattern record

Understand the fields and related lists of the incident pattern record.

Before you begin

Role required: sn_ohs_im.manager and sn_ohs_im.agent

Procedure

1. Navigate to **Workspace** > **Health and Safety Workspace**.
2. Select the **Incident pattern** tab.
3. Scroll to the **Patterns by urgency** card.
4. From the list of pattern record, select a pattern record to review.
5. On the incident pattern record, view the related lists to review and analyze the pattern.

   a. Review the **Details** tab to analyze factors such as, urgency, confidence score, and the AI generated pattern summary.
   For more information on the fields of the **Details** tab, see Incident pattern record details tab.

   b. Create actions in the **Health and safety actions** tab based on the analysis.
   For more information, see Health and Safety action form.

   c. Review the **Related incidents** tab for the list of safety incidents that form the pattern.

   d. Review the **Similar patterns** tab for any similar patterns that are detected.
   The similar patterns are auto-generated.

Incident pattern record details tab

The **Details** tab of an incident pattern record is generated automatically.

Details tab of incident pattern record

Field	Description
Number	System-generated record number.
Urgency	Level of severity.

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Details tab of incident pattern record (continued)

Field	Description
Pattern type	Common category identified during the pattern analysis.
Confidence score	Measure of how significant and reliable the health and safety pattern is. The score is measured between 1–100.
Assignment group	User group responsible to work on the pattern analysis This field isn't auto-generated and can be edited.
Assigned to	User responsible to work on the pattern analysis This field isn't auto-generated and can be edited.
Identified on	Date and time when the pattern record was created.
Updated	Date and time when the pattern record was updated last.
Pattern Summary	Generative AI summary of all the pattern values and statistics. Gives description of key details of the pattern.
Recommendations	List of recommended actions to mitigate the pattern.

Conversational AI Health and Safety incident or observation report

Use the Now Assist panel conversational interface to report Health and Safety incidents and observations that enables you to engage with live agents, virtual agents, or both.

A basic Health and Safety incident or observation can be reported using the conversational language through the Now Assist panel. Admins can configure keywords on the Health and Safety workspace. Using appropriate keywords such as health, safety, incident, injury, or observation generates functional responses. For more information on configuring the keywords, see Configure keywords for conversational AI.

Employees can use the Now Assist panel icon ( ) in the **Employee Center** home page to open a chat panel to report a Health and Safety incident easily.

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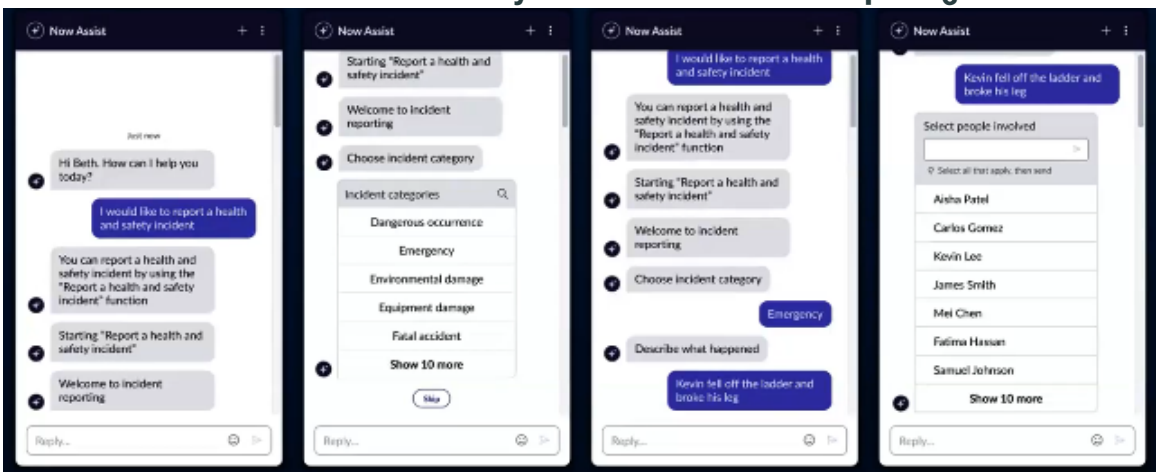
Guided conversational Health and Safety incident or observation reporting



Once the incident is recorded, the Now Assist chat panel provides the Health and Safety incident record number and the employees can view it by selecting **My Requests** or selecting the record number.

Benefits of Conversational AI health and safety for incident and observation report

Conversational AI simplifies the safety incident or observation reporting process.

- Eliminates the need to complete lengthy forms.
- Provides real-time interaction and an immediate feedback mechanism.
- Provides a user-friendly interface with Instant response and guidance.
- Provides a responsive and supportive environment and promotes proactive incident or observation reporting.
- Enables document uploads (maximum 10 mb) through Now Assist panel.

Using agentic workflows in Now Assist for Health and Safety

Use the Health and Safety agentic workflow collection to complete tasks autonomously through the Now Assist panel.

Available agentic workflow for Health and Safety

Agentic workflow name	Description	Available AI agents
Create actions for safety incidents	The Now Assist panel suggests a list of actions for a safety incident and creates the action in the incident under the Health and Safety actions related items.	• Health and safety incident analysis AI agent • Health and Safety action planner AI agent
Help resolve health and safety cases agentic workflow	The Now Assist panel reviews historical cases, analyzes actions taken, and reviews available knowledge base articles to generate suitable action plans.	Health and safety case analyzer AI agent

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Available agentic workflow for Health and Safety (continued)

Agentic workflow name	Description	Available AI agents
Health safety incident patterns assistant	The Now Assist panel reviews and analyzes patterns across available safety incident records and recommends corrective action.	Health and safety pattern intelligence orchestrator

Important: All agentic workflows and AI agent records are read only by default.

To run the AI agents autonomously, duplicate the agentic workflow if needed and then do the following steps:

- Activate the agentic workflow. For more information, see Activate an agentic workflow template.
- Activate the trigger to invoke the agentic workflow automatically.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Create actions for safety incidents agentic workflow

Use the **Create actions for safety incidents** agentic workflow to suggest actions automatically for a specific incident and create actions in the Health and Safety workspace.

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Create actions for safety incidents**.

Safety agents and managers with the [now_assist_panel_user] role can view the Now Assist panel. This panel can automatically trigger responses and create actions once an incident is opened. Once the actions are suggested by agentic AI, the safety agents and managers can enter the preferred action number or description. Entering the action number automatically creates that specific action record in the health and safety action-related item in an open incident record.

For more information on the Now Assist panel, see Now Assist panel.

The AI agents and tools used for the **Create actions for safety incidents** agentic workflow are as follows:

AI agents for the Create actions for safety incidents agentic workflow

AI Agent name	Description
Health and safety incident analysis AI agent	Recommended actions from similar health and safety incidents and AIA RAG Retrieval of Knowledge Base articles are suggested to the user.
Health and Safety action planner AI agent	Selected safety actions are added to the safety incident.

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Tools used by the Health and Safety incident analysis AI Agent

Name	Type	Execution Mode
Get details of health and safety incident	Flow Actions	Autonomous
Notify user of recommended actions	Scripts	Autonomous
Get actions from similar health and safety incidents	Scripts	Autonomous
Display message of no recommended actions	Scripts	Autonomous
Get relevant Knowledge articles	Search retrievals	Autonomous

Tools used by the Health and Safety planner AI Agent

Name	Type	Execution Mode
Add selected safety actions to safety incident	Scripts	Autonomous

Help resolve health and safety cases agentic workflow

Use the **Help resolve health and safety cases** agentic workflow to enable faster resolution of cases. It enhances the management of Health and Safety cases by improving the time to response for safety teams.

The **Help resolve health and safety cases** is a case analyzer agentic workflow designed to support safety teams in resolving cases more quickly and effectively. It reviews related historical cases, analyzes actions taken, and reviews available knowledge base articles to generate suitable action plans. You can select one or more preferred actions from the suggestions to apply to the current case. This process helps safety teams benefit from previous resolutions, reducing the time and effort required to close new cases.

To access the agentic workflow:

1. Navigate to All>AI Agent Studio>Overview.
2. Select **Help resolve Health and Safety cases**.

   The Help resolve health and safety cases **Describe and connect** workflow opens.
3. Select **Continue** or select **Define trigger** to review the trigger factor for this agentic workflow.

   Note: Confirm that the application scope is selected as **AI agents for Health and Safety** to enable the **Save** option when you change the trigger status to Active. For more information on changing the application scope, see Application picker.
4. Enable the Now Assist panel from the **Select display** option.

AI agents used in the Help resolve health and safety cases agentic workflow

The **Connect AI agents** section in the **Describe and connect** workflow displays the AI Agents that are working on the **Help resolve Health and Safety cases** workflow.

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The following agent is used to help resolve Health and Safety cases workflow:

Connect AI agents

AI agent name	Description
Health and safety case analyzer AI agent	AI agent recommends actions from similar health and safety cases and AIA RAG Retrieval of Knowledge Base articles are suggested to the user.

Tools used by the Health and Safety case analyzer AI agent

Name	Type	Execution Mode
Display message of no recommended actions	Scripts	Autonomous
Get similar actions for Health and Safety case	Scripts	Autonomous
Notify user of recommended actions	Scripts	Autonomous
Get details of health and safety case	Flow Actions	Autonomous
Add selected actions to health and safety case	Scripts	Autonomous
Get relevant knowledge articles	Search retrievals	Autonomous

Health safety incident patterns assistant agentic workflow

Use the **Health safety incident patterns assistant** agentic workflow to analyze Health and Safety incident patterns.

Health safety incident patterns assistant overview

The **Health safety incident patterns assistant** agentic workflow helps safety managers with the following from available Health and Safety incident pattern records.

- Analyze patterns
- Identify risk drivers
- Retrieve supporting evidence
- Recommend corrective actions within the dashboard or pattern-specific contexts.

Important: This agentic workflow is turned on by default. For more information, see Now Assist skills, agents, and agentic workflows on by default.

This agentic workflow is automatically available to users with sn_ohs_im.manager, sn_ohs_im.admin, and sn_ohs_im.agent roles and can be used from the Now Assist panel.

For more information on the Now Assist panel, see Now Assist panel.

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AI agent and tools used in the Health safety incident patterns assistant agentic workflow

AI agent used in the agentic workflow

AI agent	Description
Health and safety pattern intelligence orchestrator	Analyzes systemic trends across safety incidents, knowledge articles, action, and root cause analysis. Retrieves pattern-level intelligence for the health and safety incident pattern dashboard and for individual pattern records.

Tools used by the Health and Safety Pattern Intelligence Orchestrator AI agent

Name	Type	Execution mode
Get Filter Reference Data	Script	Autonomous
Find Employee By Name	Script	Autonomous
Find Asset For Pattern Filter	Script	Autonomous
Get Pattern Details	Script	Autonomous
Create Pattern Actions	Script	Autonomous
Find Location For Pattern Filter	Script	Autonomous
Generate Impact Analysis Summary	Script	Autonomous
Search Patterns	Script	Autonomous
Get Incidents For Pattern	Script	Autonomous

Critical Event Management

The ServiceNow® Critical Event Management (CEM) application enables streamlined response to critical events and global threats. It provides end-to-end management of critical events with structured, repeatable playbooks, facilitating efficient task assignment across teams and locations.

Get started



Exploring Critical Event Management

Learn how agents, on-site responders, and employees use the Critical Event Management application.



Configuring Critical Event Management

Configure the Critical Event Management workspace.



Reporting critical events

Report critical events as an agent or an employee.

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Sending notifications during a critical event

Send critical event notification to impacted people and on-site responders.



Managing impacted people

Manage impacted people, view or update their status.



Managing related records in a critical event

Manage critical event tasks, create Health and Safety incidents, and relate child critical events.

Critical Event Management reference

Get detailed description of the forms used in critical event management.

Exploring Critical Event Management

Learn how to create and manage critical event tickets, assign tasks to on-site responders, and track the impacted people.

Critical Event Management overview

Critical Event Management offers a platform to report and manage critical situations. Employees or operators report an event, and on-site responders assist the impacted people. The operator monitors the critical event closely until it's resolved.

Critical Event Management Users

Critical Event Management users

Users	Description
Admin	Administrator for Critical Event Management
Agent	Works on the Critical Event Management record from initiation to resolution.
Employee	Raises emergency requests.
On-site responder	Addresses the emergency incident reported by an agent or employee.

Critical Event Management workflow

1. Report the critical event

   An employee reports the critical event, or an agent creates the critical event.

2. Assign and activate

   The agent assigns the critical event to relevant responders and activates the critical event.

3. Send notifications

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The agent sends notifications to the impacted people and on-site responders.

4. Initiate roll call and coordinate

   On-site responders coordinate people at the assembly point and take roll calls to update their status in the impacted people list.

5. Manage communication and responses

   The agent manages the response from the impacted people and communicates with them and the responders.

6. Close the critical event

   Once the situation is resolved, the agent resolves the critical event, creates Health and Safety incidents if needed, and then closes the event.

Critical Event Management benefits

Critical Event Management benefits

Benefit	Feature	Users
Efficiently manage critical events with the clear, step-by-step guide with a playbook.	CEM Playbook tab	Agent
Create critical event tickets.	Report a critical event as an employee	Employee
Create critical event tickets.	Report a critical event as an agent	Agent
Send notifications to on-site responders and mass notifications to impacted people.	Sending notifications during a critical event	Agent
View sent notifications.	View sent notifications for a critical event	Agent
Track impacted people.	CEM Impacted people tab	Agent
Conduct roll calls and update the status of impacted people by logging in to their portal.	Conduct a roll call as an on-site responder	On-site responders
Create Health and Safety incidents.	Create a Health and Safety incident in Critical Event Management	Admins

What to explore next

To learn more about configuring and using Critical Event Management, see:

- Configuring Critical Event Management
- Report a critical event as an agent
- Report a critical event as an employee
- Managing impacted people

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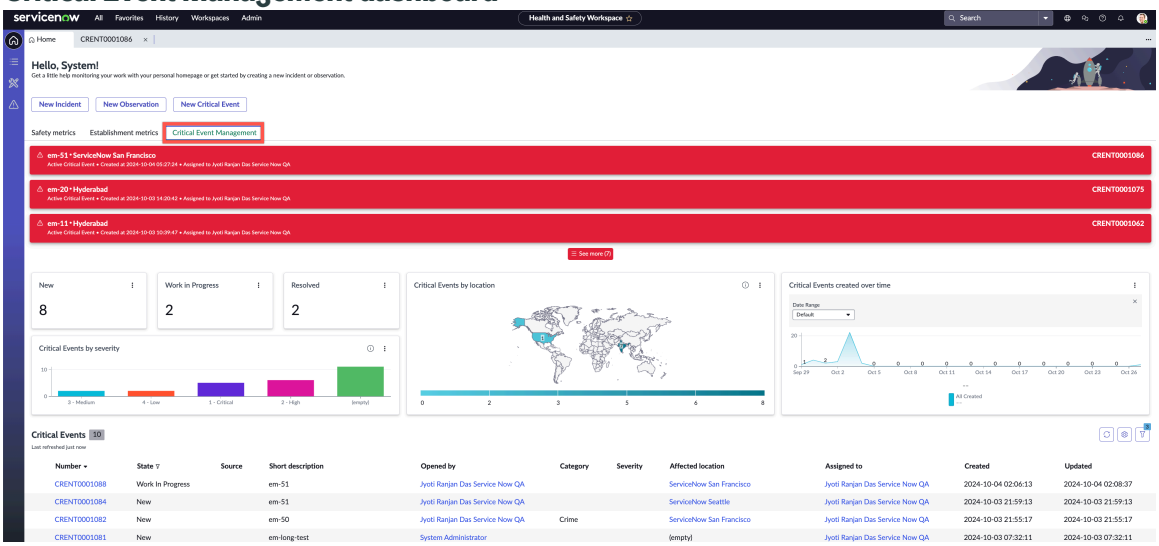
- Sending notifications during a critical event
- Critical Event Management reference

Critical Event Management dashboard

The dashboard for Critical Event Management (CEM) in the Health and Safety Workspace gives a comprehensive view of all active, ongoing, and resolved critical events, enabling agents to monitor and manage incidents effectively.

Critical Event Management dashboard



The Critical Event Management dashboard provides a high-level summary of active and ongoing events, including quick-access metrics and links to Critical Event Management tools. The dashboard empowers agents to stay organized, prioritize effectively, and respond to incidents in a timely manner.

To view the Critical Event Management dashboard, navigate to **Workspaces** > **Health and Safety Workspace** and select Critical Event Management.

Key features of the dashboard

Feature	Description
Quick action buttons	Buttons that help you quickly initiate actions, such as creating an incident, observation, or critical event.
Active Critical Events	List of active critical events with key details like location, event ID, creation time, and the assigned agent, which helps prioritize urgent events for immediate action.
Event status overview	Number of critical events by their status, such as New, Work in Progress, and Resolved, helping you quickly assess workload and progress.
Critical Events by severity	Bar chart that displays events by severity level, such as Low, Medium, High, and Critical, which helps when prioritizing your response.

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Key features of the dashboard (continued)

Feature	Description
Critical Events by location	Map view of critical events by location, which helps identify geographic patterns and areas requiring immediate attention.
Critical Events created over time	Timeline graph that tracks the number of critical events created over time, helping you monitor trends and potential increases in incidents over specific periods.
Critical Events list	Table of all recent critical events with sortable details, including event number, state, source, short description, category, severity, location, assigned agent, and timestamps for event creation and updates.

Benefits of the dashboard

Benefits	Description
Real time monitoring	View and manage critical events in real-time to promote swift responses.
Prioritization	Sort events by severity, location, and status to focus on the most urgent issues.
Trend analysis	Track trends over time to manage and help prevent future incidents.

CEM Critical event record

You can use the Critical Event Management application to create a critical event record.

Each tab in a critical event record provides specific functions to support the critical event's life cycle, from initial assessment to resolution and follow-up.

CEM Playbook tab

The **Playbook** tab in Critical Event Management (CEM) provides an agent a step-by-step guide for managing critical events. It tracks tasks across different phases and confirms that all necessary actions are completed.

A playbook serves as a starting point for customers to set up processes tailored to their specific needs.

The **Playbook** tab has the following phases:

- In the Triage Playbook you can:
  - Review the incoming submission to identify and confirm the critical event.
  - Connect the critical event to an existing parent record if it’s directly related or part of a larger situation.
  - Assign the critical event to appropriate responders to promote timely action.
- In the Generic Playbook you can:
  - Evaluate the details of the critical event to determine the necessary actions.
  - Monitor that all event details are accurate and current.

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- Coordinate communications with responders and affected individuals, send initial updates and follow-ups as needed.
- Confirm the statuses of all potentially impacted individuals to account for everyone.
- Create incident records if needed or review the list of incidents generated.

CEM Notification center tab

On a critical event record, the **Notification center** has preformatted communication templates that agents can send to impacted people and on-site responders during critical situations.

The notification center serves as a centralized hub for creating, viewing, and managing communications during an ongoing or new critical event. This feature is used to send mass notifications or to coordinate directly with on-site responders or employees.

When you navigate to the notification center tab for a new critical event, you can start a new communication task by selecting the **Create new communication** button. For more information, see Create a communication task.

You can compose an email for mass notification by using the available email templates or editing the email body to suit your specific need. The email templates promote consistency and save time. For more information on email templates, see CEM email templates.

Example use case

For a scenario where you want to notify on-site responders to start a roll call at the affected location of the critical event:

- Use Activate on-site responders in the short description field when creating the communication task.
- Use the Roll-call start template to help responders receive a clear and actionable notification.

CEM Impacted people tab

In Critical Event Management (CEM), agents can view a list and update the status of impacted people in a critical event.

Tracking the status of people during a critical event is important for their safety and well-being. This feature helps responders and agents to coordinate effectively, prioritize assistance where it's needed most, and maintain a clear communication. By monitoring the status of impacted individuals, organizations can minimize harm, provide timely support, and maintain accountability in managing the critical event.

When a critical event occurs, a list of people impacted by the event automatically populates for that location. On-site responders can only view the impacted people assigned to their specific location. To learn more about configuring the impacted people list, see Location hierarchy and child locations.

If you're an agent, you can access the list of impacted people on the **Impacted people** tab of a critical event record. To learn how to generate this list for new critical events, see Generate impacted people list.

On the record of an impacted person, you can view the person's information, such as status and emergency number. For more information on how to view an impacted person's record, see View an impacted person record. To compare the possible statuses, see Impacted people status.

A critical event might occur when there are visitors at the critical event location. You can manually add and track the status of people who wouldn't generate automatically in the list of

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impacted people. To learn how to add someone to the list manually, see Add a person manually to the impacted people list.

CEM Related records tab

In Critical Event Management (CEM), the **Related records** tab enables agents to view and manage critical event tasks, Health and Safety incidents, child critical events, and any sent notifications linked to the current critical event.

You can find the **Related records** tab in any critical event record. The tab contains the following sections:

- Critical event tasks

  You can create and manage critical event tasks. Each task represents a specific response or activity required to reduce the impact of the event. You can track the progress of each task, prioritize responses, maintain accountability for each task, and coordinate better as all critical events are listed in one place.

- Health and Safety incidents

  The agent groups with required roles can Create a Health and Safety incident in Critical Event Management.

- Child critical events

  When multiple people report the same critical event, you can mark the duplicate entries as child events to the main parent event. For details on how to create a child critical event, see Relate a child critical event.

- Sent notifications

  Review any notification that you have sent for a critical event to track and verify communication related to the critical event, including who received the notification, what the notification said, and when the notification was sent. To learn how to view the sent notifications, see View sent notifications for a critical event.

Critical event portal

On-site responders use the critical event portal in Critical Event Management to conduct roll calls, coordinate individuals to the assembly point, and gain a complete view of the emergency.

When a critical event occurs, the on-site responders receive an email from an agent notifying them about the emergency at their location. This email contains a link to log in to the critical event portal.

In the portal, you can view the active critical events where you're a member of the responder group for the location of the event. Select the **Show Details** button on an active critical event to conduct roll calls, account for the impacted people, and view emergency details.

- Conducting roll call

  You can view the list of impacted people in your location, manually add more people to the list, such as a visitor from another location, and set each person as **Needs Help** or **Accounted** using the three dot menu. For more details, see Conduct a roll call as an on-site responder.

- Emergency info panel

  The panel displays a summary of the emergency such as the state and severity of the event, the event category, the number of impacted people, and others.

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When all impacted people in a critical event are accounted for, the on-site responder receives a notification from the agent to end the roll call.

On-site responders can use the critical event portal on a desktop, tablet, and mobile device.

Employee portal

All employees in an organization can access the Employee portal using the Critical Event Management application.

To access the employee portal, log in to the employee center and navigate to **Health and Safety** > **Workplace Emergency**. All employees are assigned the sn_critical.user role automatically. This role enables the employee to report an emergency and view emergency procedures.

To learn about reporting an emergency as an employee, see Report a critical event as an employee.

Emergency procedures

Employees can find critical information, including emergency plans, contacts, and guidelines, on the Policies and Procedures page in the Critical Event Management knowledge base.

The Policies and Procedures page includes the following sections:

- Emergency Plans

  The organization's plans and procedures in an emergency.

- Emergency Contacts

  A list of local emergency contact numbers, emergency response teams, and other important contacts to use during an emergency.

- Emergency submission guidelines

  Guidelines on when and how to submit an emergency request based on the organization's criteria.

Configuring Critical Event Management

As an admin you can customize the Critical Event Management application by installing the application and reviewing and configuring the components that are installed with the application.

Configuration overview

- Install Critical Event Management

  Install the Critical Event Management application.

- Configure Critical Event Management groups

  Create groups, add members to the group, and assign roles to the members.

- Define communication plans, tasks, and recipients

  Customize communication plans, create tasks, and add recipients.

- Configure Twilio to send SMS notifications

  Send communications using the SMS feature for Twilio.

- Configure Critical Event Management application properties

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Configure important details for the Critical Event Management application.

- Configure notification templates to send email

  Add or edit a notification template.

- Configure emergency procedures for employee portal

  Add knowledge articles about emergency procedures or edit existing ones.

Install Critical Event Management

You can install the Critical Event Management application with the admin role. If the demo data and related applications aren't installed by default, the application includes demo data to install them.

Before you begin

- Verify that the application and all of its associated applications have valid entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Critical Event Management application listing in the ServiceNow® Store for information on dependencies, licensing, or subscription requirements.

Role required: admin

About this task

The following items are installed with Critical Event Management:

- Plugins
- Store Applications
- Roles
- Tables

For more information, see Components installed with Critical Event Management.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Critical Event Management application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.
3. Select a version from the list and select **Install**.
   In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

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Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Location hierarchy and child locations

The list of impacted people is populated based on the selected location and includes individuals from any child locations in the Location [cmn_location] table hierarchy.

The Location table supports a hierarchical parent-child structure, so child locations are nested under primary parent locations. Each child location can also have its own child locations.

When a critical event is assigned to a parent location, the system automatically includes all individuals associated with that location and any child locations. For example, selecting USA as the parent location (Location1) would include child locations such as California (Location2).

To configure, see Define a location hierarchy

Configure Critical Event Management groups

Create groups and assign roles to individuals in the group.

Before you begin

Role required: admin

About this task

Admins can create agent groups, add members to these groups, and add roles to these members.

- Create Agent and On-site Responder Groups:

  Set up agent or assignment groups and on-site responder groups based on your organization's requirements.

- Assign Roles to Group Members:

  Add members to these groups and assign appropriate roles for their responsibilities.

- Map On-site Responder Groups to Locations:

  A CEM admin can map each on-site responder group to a specific location to promote accurate assignment during critical events.

After you configure group-to-location mapping, the responder groups are automatically populated based on the critical event's location.

Procedure

1. Navigate to **All** > **System Security** > **User and groups** > **Groups**.
2. Create a new group by selecting **New**.
3. In the form, fill in the fields.

Groups form

Field	Description
Name	Name of the group being created.

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Field	Description
Manager	Individual responsible for overseeing the group.
Group email	Email address associated with the group.
Parent	Parent group if applicable.
Description	Additional information about the purpose and scope of this group.

4. Select **Submit**.
5. Open the new group and add members and roles for the members.

> **Note:** Assign the following roles to agent groups to enable them to create Health and Safety incidents through Critical Event Management:
>
> - sn_ohs_im.incident_reader
> - sn_ohs_im.incident_writer
> - sn_ohs_im.incident_create

Add members to the group

Add members to the group mapped to a location.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Security** > **User and groups** > **Groups**.
2. Open the relevant group to add members.
3. Select the **Group members** tab.
4. Select **New**.
5. On the form, fill in the fields and select **Submit**.

> **Note:** For more information to fill a new member form, see New member form.

Add roles to a member

Add roles to a member of the group mapped to a location.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Security** > **User and groups** > **Groups**.
2. Open the relevant group and select a member from the **Groups** tab.
3. Select **Edit** in the **Roles** tab.
4. Select the appropriate role from the list of roles.
5. Select > to add the role to the member.

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Add roles to the group

Add roles to groups that are mapped to a location.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Security** > **User and groups** > **Groups**.
2. Open the relevant group.
3. Select **Edit** in the **Roles** tab.
4. Select the appropriate role from the list of roles.
5. Select > to add the role to the group.

Map on-site responder group with location

Map the on-site responder groups with the location, enabling these groups to be automatically populated when the location is selected in a new critical event.

Before you begin
Role required: admin or sn_critical.manager

Procedure

1. Navigate to **All** > *Health and Safety* > *Critical Event Management* > **Responder Group mapping**, to view the list of the on-site responder groups.
2. Select **New** to add a new on-site responder group.
3. Select the group and location and select **Submit** to configure the group and map it with the entered location.
4. Alternatively, select the Critical Event Management list view.
5. Navigate to **On-site Responder Mapping** > **All** to view the list of on-site groups mapped with their location.
6. Select **New** to add on-site responder groups and their location.
7. Select **Save**.

Define communication plans, tasks, and recipients

Define the communication plan, tasks, and recipients that help the agent create a communication task to send out mass notifications.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Health and Safety** > **Critical Event Management** > **Communication Plan Definition**.
2. Add a communication plan by selecting **New** or edit an existing communication plan.
3. On the form, fill in the fields.
   For more information, see Communication plan form.

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4. Select **Submit**.

Note:

- You can add tasks and recipient list to the communication plan based on your organizational needs.
- To learn more about a communication plan and its process, see Task Communications Management process.

Configure Twilio to send SMS notifications

To enable the SMS feature for sending notifications, configure the Twilio telephony service.

To use SMS in addition to email as a communication channel, configure Twilio for SMS. For more information on configuring Twilio, see Configure Notify with Twilio.

Note:

- The system uses employee information from the organization's [sys_user] table to pull contact numbers.
- Enable Twilio Notify bulk SMS.

Configure Critical Event Management application properties

Configure the application properties for Critical Event Management (CEM) to access the map feature on the dashboard and to. set the maximum contacts for Email and SMS according to organizational needs.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Health and Safety** > **Critical Event Management** > **Properties**.
2. Set the number of active critical event cards to be displayed on the dashboard.
3. Set the value for the number of contacts to send Email.
   The value can be customized according to need. The maximum contacts the Email can be sent to is 4000.
4. Set the value for the number of contacts to send SMS.
   The value can be customized as needed. The maximum contacts the SMS can be sent to is 10,000.
5. In the Google Map Component Properties section, select the **Enable Geo Map feature** check box.

   Note: This configuration is available only when the Geo map application is installed.

6. Add either a client id or an API key:
   - To add a client id, obtain a client id from Google and enter it in the **Client ID from google to access Geo map** field.
   - To add an API key, obtain an API key from Google and enter it in the **Api key from Google to access Geo map** field.

   For more information, see Set up Google Maps API.
7. Select **Save**.

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Configure notification templates to send email

Configure notification templates that agents can use to compose and send emails during a critical event.

Before you begin
Role required: email_client_admin

Procedure

1. Navigate to **All** > **Email Client** > **Email Client Templates**.
2. Select **New** to add an email template or edit an existing email template.
3. Fill the form and draft the content for the template. For more information on email templates, see Email templates.
4. Select **Submit**.

Configure emergency procedures for employee portal

Configure the knowledge articles that appear in the Policies and Procedure section of the Workplace Emergency page.

Before you begin
Role required: admin

Procedure

1. To learn about the different ways to add knowledge articles, see Create a knowledge article.

   Note: Articles for Emergency plans, Emergency contacts, and Emergency submission guidelines are available with the application. You can also edit these knowledge articles as needed for customization and publish.

2. To edit the knowledge articles, see Edit a knowledge article.

Reporting critical events

Report a critical event as an agent or an employee, and self-report your status as an employee.

- Report a critical event as an agent

  Create a critical event as an agent and notify impacted people and on-site responders about the emergency.

- Report a critical event as an employee

  Create a critical event as an employee or user.

- Self-report your status

  Self-report as an employee during an emergency and inform about your safety status.

Report a critical event as an agent

Create a ticket to report a critical event in Critical Event Management as an agent when an emergency alarm is raised offline.

Before you begin
Role required: sn_critical.agent

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace**.
2. Select the **New Critical Event** button.
3. On the Critical Event form, fill out the fields.
   For a description of the field values, see Critical Event form.
4. Select **Save**.

Using a critical event playbook

A critical event playbook in Critical Event Management provides a step-by-step guide to help you manage a critical event from initiation to resolution.

Before you begin

Role required: sn_critical.agent

Procedure

1. Navigate to **Workspaces** > **Health and Safety** and select the **New Critical Event** button.
2. On the Critical Event form, fill in the fields and select **Save**.
   For a description of the field values, see Critical Event form.
3. Open the critical event and select the **Playbook** tab.
4. Complete the Triage section.

   a. On the **Review submission** task, review the record details, update the fields as needed, and select **Mark complete**.
   The playbook redirects you to the next task automatically.

   b. **Optional:** If the critical event is related to a larger existing critical event, select that critical event from the list and then select **Link to this parent**.
   If the critical event is the only one for active emergency, select **Skip** instead.

   c. On the Assign critical event form, fill out the fields and select **Move to Work in Progress**.

   d. Mark the event as active by selecting **Activate Critical Event**.

5. Complete the generic playbook section.

   a. Select **Access critical event** under the **Work in progress** section of the playbook.

   b. Choose the **Mark Complete** button or **Skip** button to move to the next task on the playbook.

   c. Complete the **Review and update the critical event information** task as needed, then select **Mark Complete** to proceed.

   d. Select **Compose** on an initial-communication template or select **Go to Notification center** to compose an ad-hoc communication for the impacted people.
   For more details on sending ad-hoc communication, see Create a communication task

   e. Choose the **Activate on-site responder** template and send communication to on-site responders, to inform them of the ongoing event.

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f. Close the sent communication notification and select **Mark Complete** in the **Playbook** tab to proceed to **Conduct roll call** step.
View the cumulative count of **Total impacted**, **Need help**, **Unknown**, and **Accounted people** individuals.

g. Select **View Impacted People** to access the list of impacted people and update their status if needed.

h. Select **Mark Complete** to move to the next step.

i. Select **Resolve Critical Event** when the described actions are completed and the emergency is resolved.

j. In the **Post critical event** section, select the appropriate **Closure code** and add notes if necessary.

k. Select **Close Critical Event** to complete the guided steps in the playbook.

Report a critical event as an employee

Create a ticket to report a critical event in Critical Event Management as an employee.

Before you begin

Role required: sn_critical.user

Procedure

1. Log in to the Employee Center.
2. Navigate to **Health and Safety** > **Workplace Emergency**.
3. Select **Report Emergency**.
4. In the form, fill in the fields,

Report an emergency form

Field	Description
What happened?	Describe the nature of the emergency or incident.
Where did it happen?	Select the specific location of the incident from predefined options.
...or describe location	Describe the location if the drop down options are not sufficient or applicable.
Additional Information	(Optional). Provide supplementary details, context, or clarification about the incident or emergency.

5. Choose to submit the report immediately or later.
   - To submit the report immediately, select **Submit**.
   - To save the report to change and submit later, select **Save as Draft**.

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Self-report your status

Self-report your status as an employee in a critical event through the email or SMS notification that you receive from an agent or responder.

Before you begin
Role required: sn_critical.user

Procedure

Open the email or SMS notification and respond.

Notification	Steps
Email	**a.** Select the **I'm Safe** button. **b.** Select **Send**.
SMS	**a.** Enter 1. **b.** Select **Send**.

You can also enter any additional information about the critical event that you want to send. It's recorded as a note from you in your record that agents can view.

View emergency procedures

View the emergency procedures as an employee by logging in to the employee portal.

Before you begin
Role required: sn_critical.user

Procedure

1. Log in to the employee center.
2. Navigate to **Health and Safety** > **Workplace Emergency**.
3. Select **Policies and Procedures**.
4. Choose which of the emergency procedures to view:
   - To view what to do in case of an emergency at your organization, select the Emergency Plan page.
   - To view who to contact in case of an emergency, select the Emergency Contacts page.
   - To view when and how to submit an emergency request, select the Emergency submission guidelines page.

   For more information on the types of emergency procedures, see Employee portal.

Sending notifications during a critical event

Send critical event notification to impacted people and on-site responders in Critical Event Management to inform them of the situation and request their response.

Before you begin
The critical event state must be set to **Active** to populate the notification templates.

Role required: sn_critical.agent

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About this task
Use the existing notification templates to send messages to impacted people and on-site responders. The templates are preset by the admin.

Procedure
1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Notification center** tab.
4. In the tile for the relevant communication, select the **Compose** button.
   You can manage the communication recipients and the communication record by selecting the More actions icon (⋮).

   For more information on managing recipients, see Manage the recipients of a communication task.
5. Edit the message in the template as needed.
6. Select **Send**.

Create a communication task

Create an on-demand, customized message for a critical event in Critical Event Management, choose how often to send it, and select the communication channels.

Before you begin
Role required: sn_critical.agent

Procedure
1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Notification center** tab.
4. Select the **Create new communication** button.
5. In the Communication form, fill in the fields.
   For a description of the field values, see Communication form.
6. Select **Compose communication**.

Result
If you chose **Now** from the **Compose and send communication** field on the Communication form, then a new tab opens so you can choose a template and compose your message. If you chose **Later**, then you're redirected back to the **Notification center** tab.

Note: You must compose the message before you can send the communication. For more information on composing an existing communication task, see Sending notifications during a critical event.

Manage the recipients of a communication task

Add or edit the list of recipients for various communication tasks.

Before you begin
Role required: sn_critical.agent

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Notification center** tab and then select the **Manage recipients** button.
4. In the **Communication plan** drop-down menu, select the communication task for which you want to manage recipients.
5. In the form, fill in the fields.

Manage recipients form

Field	Description
Add recipient	User, group, or recipient list who receives the communication task.
Designate role	Role that is assigned the user, group, or recipient listed in the **Add recipient** field.
Audience	List of potentially impacted people or important people who receives the communication task.

6. Select **Save**.

Note: You can also open the Manage recipients form by selecting the More actions icon ( ) on the communication task.

Managing impacted people

Generate and manage an impacted people list,view an impacted person's record, and update their status in Critical Event Management.

Generate impacted people list

Generate an impacted people list for a critical event in Critical Event Management. The impacted people list is used to account for every individual in the critical event location.

Before you begin

Role required: sn_critical.agent

About this task

Employees are mapped to their workspace location. The employee list is automatically generated according to the location added in the critical event ticket.

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select **New Critical Event**.
   You can also select an existing critical event in the *Critical Event Management* tab.
2. In the Critical Event form, fill out the fields.
   For a description of the field values, see Critical Event form.
3. Select **Save**.
4. Select the **Impacted people** tab.

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5. Select the **Load Impacted People** button.
   The list of impacted people is extracted based on the location. To add people manually, see Add a person manually to the impacted people list.

Add a person manually to the impacted people list

Manually add people to the impacted people list who may have visited the critical event location. Adding people help account for visitors, as their names won't be automatically generated in the impacted people list.

Before you begin
Role required: sn_critical.agent

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Impacted people** tab.
4. Select **Add Person**.
5. In the Add Impacted People pop-up, enter the person's name and select the **+** icon.
6. Select the status of the person.
   For details on impacted people status, see Impacted people status.
7. Enter any relevant notes.
8. Select **Save**.

Export an impacted people list

Export an impacted people list as a PDF, CSV, JSON, or Microsoft Excel file in Critical Event Management and either download or email the file.

Before you begin
Role required: sn_critical.agent

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Impacted people** tab.
4. Select the **Export** button.
5. In the File Type drop-down list, choose your desired file format for the exported list.
   The file format options are the following:
   - Excel
   - CSV
   - JSON
   - PDF
6. In the Delivery Type drop-down list, choose where to send the exported file.

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- To download the file to your device, select **Download**.
- To send the file via email, select **Email**.

7. If you chose to send the file to an email address, then in the **Email** field, enter the email address.
   The **Email** field only appears after selecting **Email** from the drop-down list.
8. Select **Export**.

View an impacted person record

View and track the status of an impacted person's record as an agent in Critical Event Management.

Before you begin

Role required: sn_critical.agent

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Impacted people** tab.
4. Select the individual from the **Total Impacted** list to view that person's record.
   The record shows the following information:
   - Phone number
   - Email
   - Critical event number
   - Name
   - State of the emergency
   - Job title
   - Last date and time the person responded
   - Location of the critical event
   - Status
   - Manager
   - Present on Site
   - Notes

   The record also shows the activity stream and notifications.

Mark the status of impacted people as an agent

Take attendance of the impacted people in Critical Event Management and request help if needed.

Before you begin

Role required: sn_critical.agent

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Impacted people** tab.
4. On the Total Impacted list, select the check box for the relevant individual.
5. Double-click (or use the keyboard shortcut) the field in the Status column for that impacted person.
6. In the Status drop-down list, select the appropriate status.
   For more information on the different statuses for impacted people, see Impacted people status.
7. Update the status of multiple individuals by selecting multiple check boxes and then selecting the **Accounted** button or selecting the Accounted More Actions icon (▾) and choosing a different status.

View notifications received

View the list of notifications received for an impacted person in Critical Event Management.

Before you begin

Role required: sn_critical.agent

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Impacted people** tab.
4. Select an individual from the **Total Impacted** list.
5. Select the **Notifications** tab.
   This tab shows the communication sent to and received from the impacted person.

Conduct a roll call as an on-site responder

Mark the status of the impacted people in a critical event in the responder portal. You can also manually add more impacted people in the list.

Before you begin

Role required: sn_critical.responder

Procedure

1. Log in to the responder portal through the email sent by an agent.
2. On the critical event, select **Show Details**.
3. Mark the status of the impacted people.

Status	Description
Accounted	Choose one of the following:

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Status	Description
	○ Select the check mark ( ) for the individual. ○ Select the More actions icon ( ) and select **Accounted**.
Need Help	Select the More actions icon ( ) and select **Need Help**.

4. If you must undo or change the status of an individual, select either the **Accounted** tab or the **Need Help** tab and find the individual.
   - To undo the status and mark the individual as **Unknown**, clear the check mark ( ).
   - To change the status, select the More actions icon ( ) and select the desire status.
5. If you must add an impacted person manually, select the **Add Person** button.

Managing related records in a critical event

Manage the related records in the **Related records** Related Item of a critical event in Critical Event Management. Related records include other critical event tasks, Health and Safety incidents, child critical events, and sent notifications.

Create a Health and Safety incident in Critical Event Management

Report a Health and Safety incident through the **Related records** Related Item in Critical Event Management.

Before you begin

Role required: sn_ohs_im.incident_reader, sn_ohs_im.incident_writer, and sn_ohs_im.incident_create

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Related records** Related Item.
4. Select *Health and Safety* **incidents**.
5. If you want to populate any existing Health and Safety incidents, select the **Add** button, select the check box next to one or more incidents, and select **Add**.
6. Create a Health and Safety incident by selecting **New**.
   The record opens in a new record tab.
7. Complete the **Report an incident** playbook.

Relate a child critical event

Mark duplicate or related critical events as child events and link them under the main, parent event.

Before you begin

Role required: sn_critical.agent

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Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Related records** Related Item.
4. Select **Critical child event**.
5. Select the **Add** button.
   A list of open critical events appears.
6. Select one or more critical events that were created for the same emergency situation as the parent critical event.
7. Mark the critical events as duplicate by selecting **Add**.
   Alternatively, on a child event record, you can link it to a parent record by entering a record number in the **Parent** field.
   The status of the child event is set to **Consolidated**. When you open this child event, the **Details** Related Item displays the parent critical event in the record view.

View sent notifications for a critical event

View all notifications sent for a critical event in the **Related records** Related Item in Critical Event Management.

Before you begin
Role required: sn_critical.agent

Procedure

1. Navigate to **Workspaces** > **Health and Safety Workspace** and select the **Critical Event Management** tab.
2. Open the critical event.
3. Select the **Related records** tab.
4. Select the **Sent notification** tab.

Critical Event Management reference

Reference topics offer additional information about the lists and forms that you use to configure and operate the Critical Event Management application.

Components installed with Critical Event Management

Several types of components are installed with the Critical Event Management application, including tables and user roles.

Store applications installed

Store apps installed with Health and Safety Risk Management

Store application	Description
Health and Safety Core	Installs core data model for Health and Safety. This data model includes common components such as Health and Safety user

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Store apps installed with Health and Safety Risk Management (continued)

Store application	Description
	profile and actions that are used in the Health and Safety applications. For more information on store applications, roles, and tables installed with Health and Safety Core, see Components installed with Health and Safety Core.
Workplace Core [sn_wsd_core]	Enables workplace locations for Health and Safety applications. **Important:** The application installation doesn't install the location demo data for the Workplace Core location model. As a workaround, repair the Workplace Core plugin with the **Load demo data** option.

Roles installed

Roles installed with Critical Event Management

Role title [name]	Description	Contains roles
Critical event admin [sn_critical.admin]	Administrator role. Configures the Critical Event Management application properties.	• sn_critical.agent • sn_critical.responder • sn_comm_management.comm_plan_admin • sn_critical.user • sn_critical.manager
Critical event agent [sn_critical.agent]	Works on critical event records from initiation to resolution.	• sn_comm_management.comm_plan_manager • task_editor • canvas_user • sn_ohs_im.workspace_user • sn_critical.read
Critical event manager [sn_critical.manager]	Oversees all critical events and guides agents and responders to resolve them.	sn_critical.agent
Critical event reader [sn_critical.read]	Has read-only access to critical event records.	sn_comm_management.comm_plan_viewer

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Roles installed with Critical Event Management (continued)

Role title [name]	Description	Contains roles
On-site responder [sn_critical.responder]	Assists on-site personnel during critical events.	sn_critical.read
Critical event user [sn_critical.user]	Reports emergency as an employee.	None

Tables installed

Tables installed with Critical Event Management

Table	Description
Critical event communication plan [sn_critical_comm_plan]	Stores information about detailed communication strategies during critical events. This table is an extension to the Communication Plan [comm_plan] table.
Critical event communication task [sn_critical_comm_task]	Tracks individual tasks related to the communication plan for critical events. This table is an extension to the Communication Task [comm_task] table.
Critical event [sn_critical_event]	Contains records of critical events. This table is an extension to the Task [task] table.
Impacted people [sn_critical_impacted_people]	Lists individuals impacted by critical events.
On-site responder mapping [sn_critical_on_site_responder_mapping]	Maps responders to on-site locations during critical events.
Critical event task [sn_critical_task]	Stores tasks related to Critical Event Management. This table is an extension to the Task [task] table.

Plugins installed

Plugins installed with Critical Event Management

Plugins	Description
Notify [com.snc.notify]	Provides the ability to set SMS preferences to receive messages from different providers.

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Plugins installed with Critical Event Management (continued)

Plugins	Description
Task Communication Management [com.snc.task_communication_management]	• Activates the base system. • Includes demo data and activates related plugins if they aren't already active.

Store applications installed

Store applications installed with Critical Event Management

Store applications	Description
Health and Safety	Allows you to report Health and Safety incidents.
Task Communications Management UI Components for Configurable Workspace	Stores bundle of UI components required to leverage Task Communications Management core capabilities in workspaces.

Optional applications

Optional applications for additional features in Critical Event Management

Application	Description
Geo Map component sn_geo_map	Enables the map component on the Critical Event Management dashboard.

Critical Event form

Field descriptions on the form for a critical event. It includes the Critical Event form section and the Closure form section.

Critical Event form

Field	Description
Critical Event form section	
Number	Critical event number.
Category	Type of critical event.
Severity	Severity level for the critical event.
Source	Pre-populated with the user who reports the critical event.
Affected location	Location of the critical event.
Opened by	User who created the form.
Additional reporters	Reporter of the child event associated with the parent event.

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Critical Event form (continued)

Field	Description
On-site responder group	Responder group from the list of user groups mapped to the location. Only assignment groups with the sn_critical_responder role appear.
Parent	Parent critical event number.
Assignment group	Assignment group of the critical event location. Groups containing individuals with the agent [sn_critical_agent] role appear on selecting this field. Select the correct assignment group.
Assigned to	Critical event agent that is assigned to the critical event.
Short description	Summary of the critical event.
Description	Detailed description of the critical event.
Closure form section	
Closure Code	Type of closure for the critical event. Types are the following: • Critical Event Resolved: Critical event has ended. • Non-Critical Event: Critical event was a false alarm or doesn't require a response.
Close notes	Comments about the critical event closure.

Impacted people status

Descriptions of the possible statues for impacted people.

Impacted people status

Status	Description
Unknown	Default status. No information is available about the impacted person.
Accounted	Impacted person is traced and confirmed safe.
Need Help	Impacted person is traced and needs medical attention or other assistance.

Communication form

Field descriptions on the form for a communication task.

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Communication form

Field	Description
Compose and send communication	Option to send the communication immediately or schedule it for later. **Note:** Scheduling the communication adds a timer to the communication based on the **Due in (minutes)** field, which prompts the agent to send it manually. It doesn't send automatically.
Frequency	How often the communication should be sent.
Short description	Summary of what the communication is about.
Due in (minutes)	Time in minutes before the communication should be sent. This field appears only when **Later** is selected from the **Compose and send communication** field or when both **Now** is selected from the **Compose and send communication** field and **Recurring** is selected from **Frequency**.
Channels	Channel to send the communication. For example, email or SMS.
Recipients	People who receive the communication.

Communication plan form

Field description to add a new communication plan.

Communication plan form

Field	Description
Name	Unique name for the communication plan.
Table	Table that the plan is attached to when the conditions are met.
Type	Type of communication plan, such as Technical, Internal, External, Customer.
Order	Order in which the communication plans must be associated with the table.
Condition based	Option to define whether the plan is attached to a table based on the conditions. For example, if you want to attach a communication plan to an incident of priority = 2, you can mention the condition in the Condition field.
Active	Option to define whether the plan definition is active.
Description	Detailed description of the plan definition.

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Communication plan form (continued)

Field	Description
Condition	Condition under which a communication plan gets attached to a table.

CEM email templates

Various email templates are available depending on the purpose of the communication, whether it's for employees, or on-site responders.

Critical Event Management email templates

Template name	Description
Roll-call End	Inform that the roll call for the current emergency is complete.
Default Template	Compose your own email when none of the predefined templates meet your needs.
Roll-call Start	Notify the on-site responder to start the roll call for the active emergency.
Follow-up	Send a reminder to the employees who haven't responded to confirm their safety status.
Emergency Start	Notify the employees of an ongoing emergency and request their safety status.
Update Communication	Inform employees or responders about any updates throughout the emergency situation.
End Emergency	Notify that the emergency has ended.

New member form

Field descriptions to add a new member to a group mapped to a location.

New member form

Field	Description
User ID	Unique identifier for the member.
First name	First name of the member.
Last name	Last name of the member.
Title	Member's job title. Search from predefined options.
Department	Department name to which the member belongs.
Password reset	Select this check box to require the member to change the password during the first login.
Locked out	Select this check box to lock the member out of the instance and terminate all their active sessions.

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New member form (continued)

Field	Description
Active	Select this check box to make this member active.
Web service access only	Select this check box to designate this member as a non-interactive user.
Internal Integration User	Select this check box to designate this member as a service account.
Email	Member email address.
Language	Preferred language for the member.
Calendar integration	Choose the calendar integration option, such as outlook.
Time zone	Time zone in which the member is located.
Date format	Date format for the member's account.
Business phone	Member's business phone number.
Mobile phone	Member's mobile phone number
Photo	Attach a photo of the member, if appropriate.

Safe Workplace

ServiceNow® Safe Workplace applications help you reopen your workplaces and support the health and safety of your employees after emergencies and pandemics like COVID-19.

Workforce readiness

Help employees return to the workplace when they're healthy and ready with the following Safe Workplace applications.

Employee Readiness Surveys

With the ServiceNow® Employee Readiness Surveys application, send surveys to help gauge whether users are ready to return to the workplace. Ask questions to get insights into how users feel about returning to work, their current health status, and underlying concerns such as personal health, family obligations, and anxiety about workplace safety. Based on responses, you can measure and determine the steps needed to help users feel safe and secure upon their return.

Employee Health Screening

The ServiceNow® Employee Health Screening application enables organizations to screen users before entering the workplace to ensure compliance with the organization's entry requirements, such as a temperature check and personal protective equipment (PPE). Based on their own criteria, organizations can determine whether it’s safe for the user to enter the workplace. Organizations can use a reporting dashboard#o view trends by sites and record the return of users into#heir #facilities.

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Workplace readiness

Prepare your workplace for the return of employees with the following Safe Workplace applications.

Workplace Core

Using the ServiceNow® Workplace Core application, quickly configure sanitized and socially distanced workspaces for the return of users. With department leaders, workplace service managers can reserve available workspaces for users in shifts. Workspaces can be scheduled for disinfection before and after these shifts. Through reports and dashboards, workplace managers can view how many of the available workspaces have been reserved. Workplace managers also have a real-time view of all cleaning task statuses, including a full audit trail history.

Workplace Personal Protective Equipment Inventory Management

The ServiceNow® Workplace Personal Protective Equipment Inventory Management application helps you manage and monitor workplace needs for safety equipment provided to your workforce. A dashboard provides a comprehensive view of inventory by each facility, an aggregate scope of the entire workplace, and historical data on how equipment levels have changed over time. You can update current inventory levels daily for accurate and real-time inventory management.

Use the Safe Workplace applications together to automate workflows for determining your employees' readiness and needs for returning to work, preparing sanitized and socially distanced workspaces, and managing the inventory of safety equipment for your workforce.

Safe Workplace

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

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Employee Readiness Surveys

The ServiceNow® Employee Readiness Surveys application lets you evaluate the readiness of your workforce to return to the workplace by asking users to complete a survey.

Employee Readiness Surveys is an application that you install to use with Emergency Outreach. For information about Emergency Outreach and how surveys are sent via outreach notifications, see Emergency Outreach.

After you install the application, the check-in administrator for Emergency Outreach can view and edit the survey questions to suit your needs. New surveys can be added, for example, to evaluate users in different regions or address other concerns.

The check-in administrator sends the surveys to targeted audiences using the Emergency Outreach notification methods.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Use with other Safe Workplace suite applications

Employee Readiness Surveys is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.
- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.

All Safe Workplace suite applications are available in the ServiceNow Store.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Domain separation for the Employee Readiness Surveys application

Surveys are configured and managed through the Survey Management application on your ServiceNow instance. For information about how domain separation is supported, see Domain separation for Survey Management.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

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Install Employee Readiness Surveys

You can install Employee Readiness Surveys if you have the admin role. Installing Employee Readiness Surveys adds notification options and a default health readiness survey to the Emergency Outreach app.

Before you begin
Role required: admin

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Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

About this task

The Send Outreach form in Emergency Outreach has an option to send a survey instead of a health status request. Users with the sn_imt_checkin.checkin_admin role become owners of the example health readiness survey.

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Employee Readiness Surveys`.
3. Select **install**.

   The Application installation dialog box opens.
4. **Optional:** Load the demo data by selecting the **Load demo data**check box.

   (Optional) For information about how to install or reinstall demo data after the initial installation, see the Work around to install demo data if application is already installed [KB0722909] article in the Now Support Knowledge Base.
5. Select **install**.
6. When the installation is complete, select **Close**.

Result

Employee Readiness Surveys is installed on your instance. Use it by navigating to the Emergency Outreach app.

Configure Employee Readiness Surveys notifications

The administrator can add or modify Employee Readiness Surveys notifications. Users with the sn_imt_checkin.checkin_admin or survey_admin role can view the base system survey and copy it to make changes, or add a new survey.

Modify the Employee Readiness Surveys notification

Modify the Employee Readiness Surveys base system email notification.

Before you begin

Review the details about planning for, creating, and modifying system notifications by starting with Create an email notification.

Role required: admin

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Send Outreach**, and then select the Content configuration tab.
2. In the **Response Mode** field, select **Survey**.
   The **Survey** field appears and the entry in the **Notification** field changes to **Outreach Surveys**.
3. Select the preview icon ( ) beside the **Notification** field, and then select **Open record**.
4. In the Notification form for this Outreach Surveys notification, modify the details as needed. Retain the default Assessment Instance [asmt_assessment_instance] table value.
5. Select **Preview Notification** and verify your changes.
6. When you're finished, select **Update**.

Result

The modified notification is used for future Employee Readiness Surveys notifications.

Add an Employee Readiness Surveys email notification

Add a new Employee Readiness Surveys email notification to use in Emergency Outreach to send the survey link.

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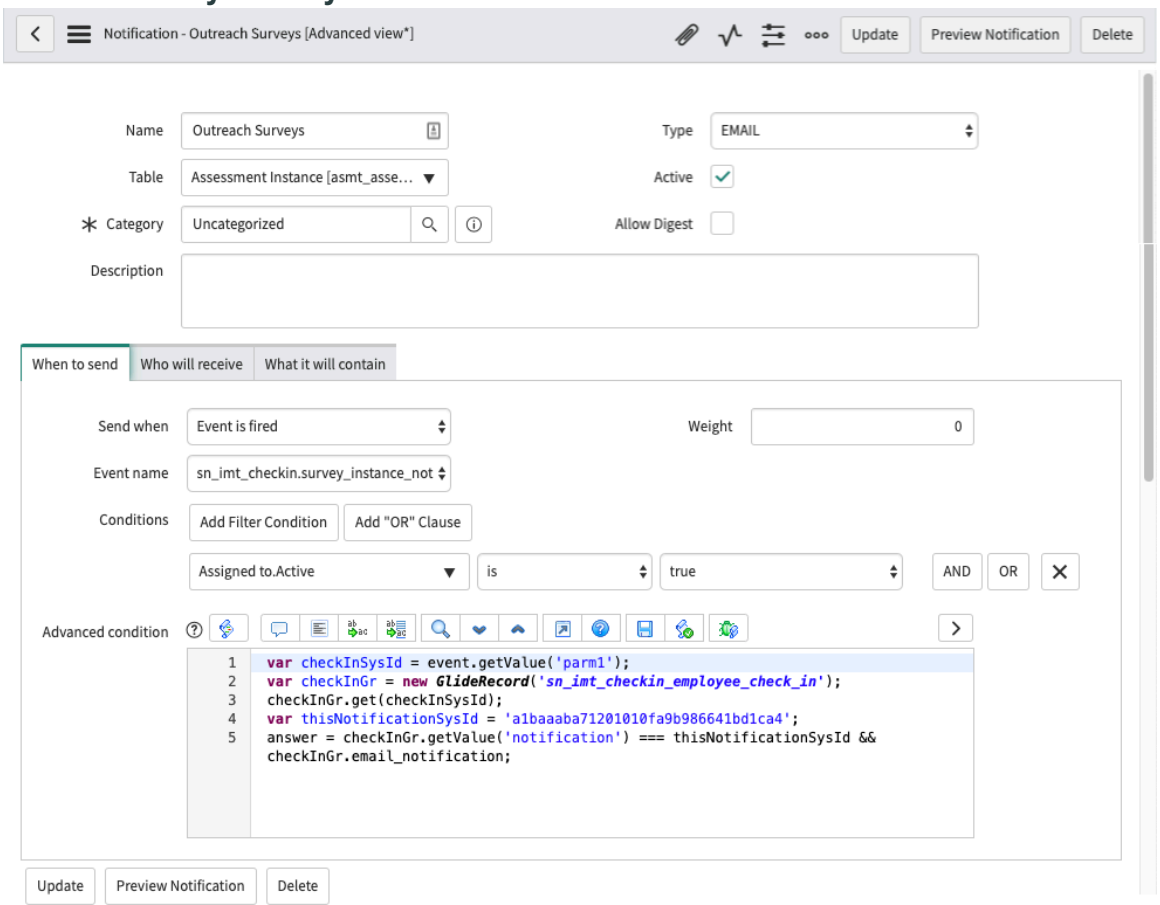
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Review the existing **Outreach Surveys** email notification to familiarize yourself with the scripts and other settings.

Outreach Surveys base system notification



3. Select **New**.
4. In the **Table** field, select the Outreach Surveys [sn_imt_checkin_employee_check_in] table.
5. On the When to send tab, set the conditions.
   - Set the **Conditions** criteria as shown in the image of the base system notification.
   - Enter the *Advanced condition* script with the following change.

     For this line: `var thisNotificationSysId = 'a1baaaba71201010fa9b986641bd1ca4';`

     Replace the sys_id with the sys_id notification that you're adding. To get the sys_id, open the additional actions menu, and then select **Copy sys_id**.
6. On the Who will receive tab, open **Users/Groups in fields** and select **Assigned to**.
7. On the What it will contain tab, complete the remaining information.
8. Select **Submit**.

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9. In the Notifications list, open the notification that you added and select **Preview Notification**.
10. Review the notification and make any necessary modifications.
11. Select **Update**.

Configure Employee Readiness Surveys

Review the default Employee workplace readiness survey installed with the Employee Readiness Surveys app. Modify the survey, or create one or more surveys to use based on the readiness concerns that you want to address and any legal obligations under applicable law, including data protection laws.

Before you begin

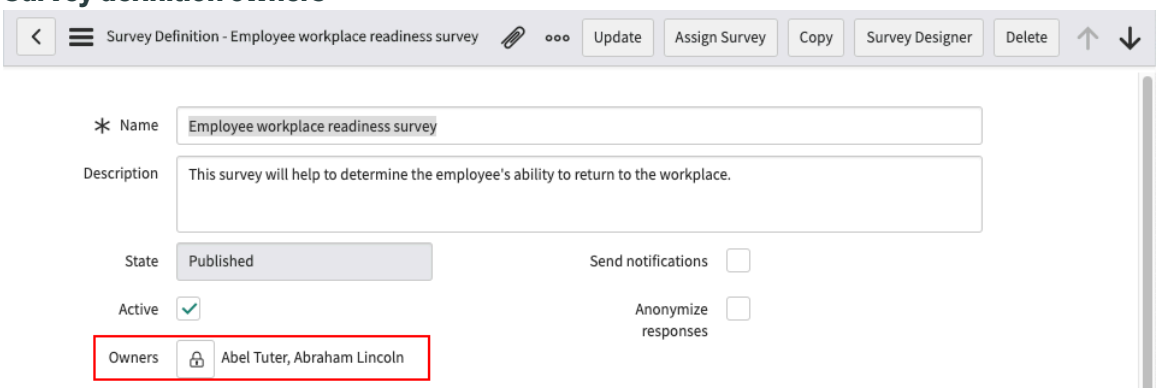
Familiarize yourself with Survey administration. Then meet with other emergency response team stakeholders to plan the changes to the survey. Decide whether to edit the existing survey before you send it to employees, or to create one or more new surveys.

Role required: sn_imt_checkin.checkin_admin, survey_creator, survey_admin, or admin

About this task

Users with the sn_imt_checkin.checkin_admin role have the survey_creator role, and are made owners of the default readiness survey. Users with the survey_creator role can edit or copy the default survey. These users can also add another readiness survey and add other users as owners to collaborate with them.

Survey definition owners



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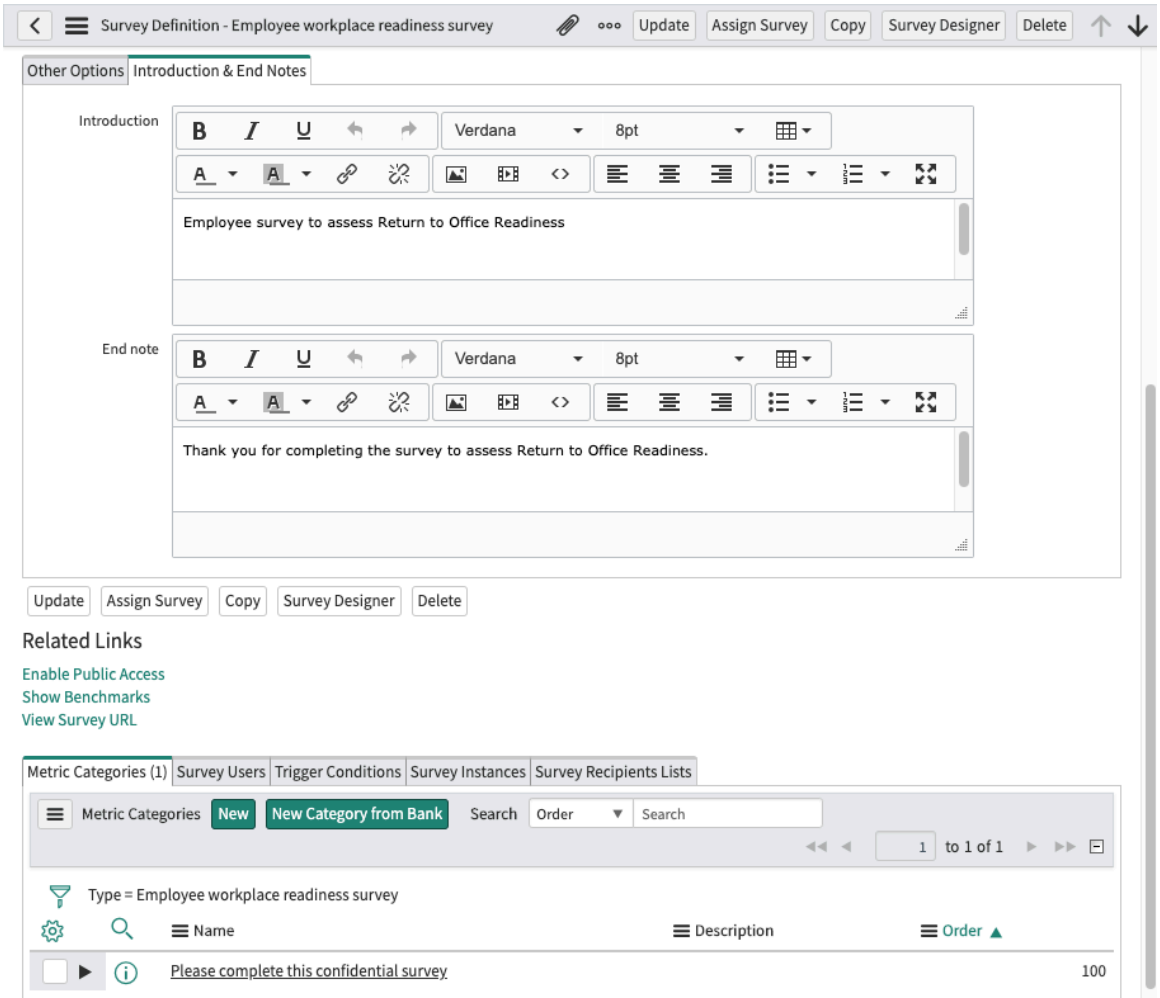
Procedure

1. Navigate to **All** > **Surveys** > **View Surveys** and open the **Employee workplace readiness survey**.



2. Using the plan that you made for changing the survey, update any of the following survey elements.

Option	Description
Add owners	Select the lock icon ( ) beside **Owners** to unlock the list of survey owners. Add the user to collaborate with on this survey.
Update the introductory and ending text	Select the Introduction & End Notes section tab and update the text.
Work with the questions	**a.** In the Metric Categories related list, select **Please complete this confidential survey**. Questions appear in the Assessment Met rics related list. **b.** Select the question to open the Survey Question form. Modify and complete your edits. The answers are listed in the Assess ment Metric Definitions related list.

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Option	Description
Work with the question responses	In the Assessment Metric Definitions related list, select the response to edit. Update the re sponse as desired.

3. Complete any other changes to the survey options, and select **Update**.

Result
The modified survey is used for future outreach surveys.

Add Employee Readiness Surveys

Create one or more additional surveys to use for different workplaces or to evaluate other areas of concern. Start by planning the surveys carefully to gather the best data for your evaluation of readiness to return to the workplace.

Before you begin
Role required: sn_imt_checkin.checkin_admin, survey_creator, survey_admin, or admin

About this task
Consider how you want to begin to reopen your workplace, and what you must understand about the employees before you can begin. Work with a user with the survey_admin role in your company to plan the types of questions and responses for the survey. For information about adding surveys, see Survey administration and Survey designer.

Procedure

- To create a survey, navigate to **Surveys** > **View Surveys**.
- Select **New** or **Survey Designer** and enter the information to complete the survey from the plan that you made.
  Decide on a naming convention to use for surveys, so that a user with the sn_imt_checkin.checkin_admin role knows which one to select when sending outreach surveys. For example, **Readiness survey India** or **Customer service employees return readiness**.

Employee Health Screening

Screen users before entering the workplace to ensure compliance with the organization's entry requirements, such as a temperature check and PPE. Require that users agree to comply with health and safety policies before they return to the workplace.

The ServiceNow® Employee Health Screening application enables organizations to screen users before entering the workplace to ensure compliance with the organization's entry requirements, such as a temperature check and personal protective equipment (PPE). Based on their own criteria, organizations can determine whether it’s safe for the user to enter the workplace. Organizations can use a reporting dashboard#o view trends by sites and record the return of users into#heir #facilities.

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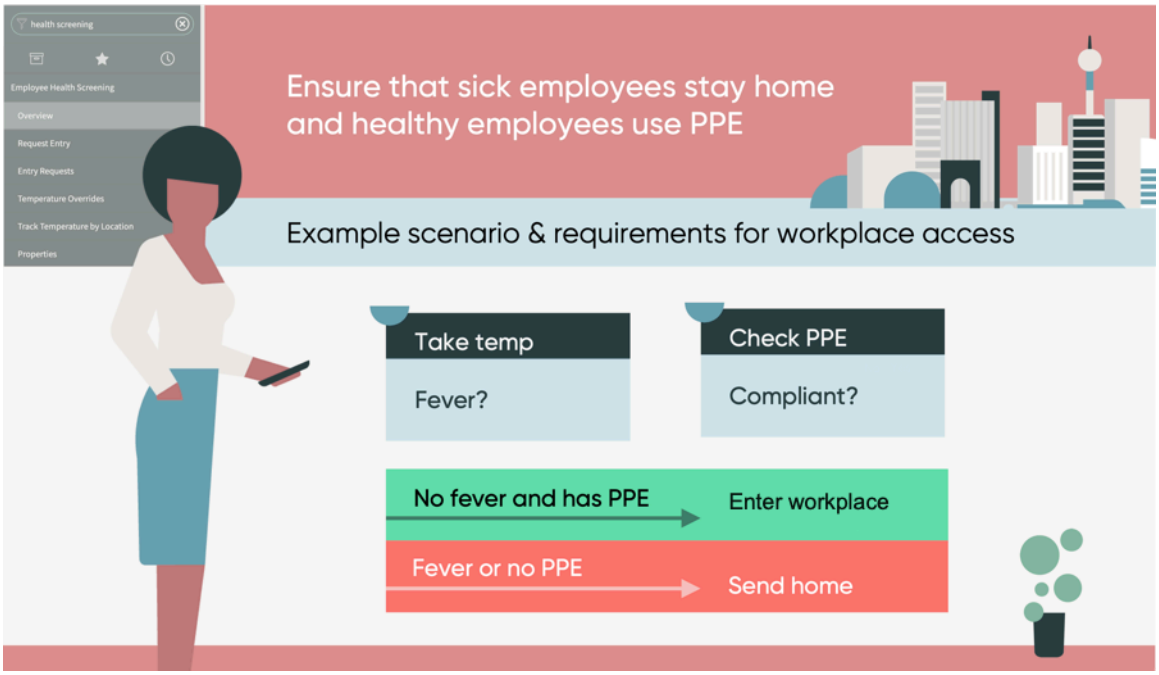

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Integrate with Customer Service Management

Use ServiceNow® Customer Service Management and Employee Health Screening together to provide consumers and contacts with access to a health verification form on your Consumer or Customer Service Portals. Conduct health screenings for consumers and contacts before they can be granted entry to a location. For more information about using Customer Service Management with Employee Health Screening, see Integrate Customer Service Management with Safe Workplace applications.

Use with other Safe Workplace suite applications

Employee Health Screening is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- With the Emergency Outreach application, notify employees of important information about anticipated or occurring emergency situations. Send an outreach notification via email, mobile push message, or SMS message to request an employee response. You can also configure other preferred communication channels.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.
- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.

All Safe Workplace suite applications are available in the ServiceNow Store.

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Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

ServiceNow is offering this application to government agencies and their authorized users, not to employees of government agencies in their individual capacities. Use of this application is being offered free of charge for a limited or extended time period and with no expectation of payment from the government agency to ServiceNow for use during that time period, nor does usage create an actual or implied future obligation on behalf of the government. ServiceNow hereby expressly waives any future claims for payment from the agency in connection with usage of the application. Government customers are solely responsible to confirm with the agency's Ethics Office or its authorized representative that acceptance and usage of the application is permissible.

All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Install Employee Health Screening

You can install the Employee Health Screening application if you have the admin role. This application includes demo data and installs the related store applications and plugins if they are not already installed.

Before you begin

Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search field.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.

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4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed.

   Installing your application also automatically installs the dependent applications or plugins if they are not installed already.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.
   Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Note: If you don't load the demo data for a store application during installation, it's not available to load later.

6. Click **Install**.

Components installed with Employee Health Screening

Roles and tables are installed with the Employee Health Screening application.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Role title [name]	Description	Contains roles
Health monitor [sn_imt_monitoring.monitoring_user]	Use the health screening page to record returning employee details. View employee health and safety status.	• report_user • sn_imt_core.reader
Health monitor administrator [sn_imt_monitoring.monitoring_admin]	Configure properties and temperature overrides and view the dashboard.	• report_user • sn_imt_monitoring.monitoring_user

Tables installed

Table	Description
Request for Entry [sn_imt_monitoring_request_for_entry]	Results of employee health screening events. If the *sn_imt_monitoring.auto_create_request* property is enabled, the table also includes results from health monitors looking up an employee's health

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Table	Description
	and safety status. For results from a health screening, the **Source** field is set to **Health screen**. For results from a status lookup, the **Source** field is set to **Auto-checkin**.
Location Override [sn_imt_monitoring_temperature_override]	Locations where temperature thresholds for employees are different from the system property threshold.
Employee Health Verification [sn_imt_monitoring_health_verification]	All health verifications submitted by employees.
Visitor Request For Entry [sn_imt_monitoring_visitor_request_for_entry]	Results of visitor health screening events.
Visitor Location Override [sn_imt_monitoring_visitor_temperature_override]	Locations where temperature thresholds for visitors are different from the system property threshold.
Information Messages [sn_imt_monitoring_information_message]	Messages provided to specific types of users (determined by their audience) when they attempt to enter a location.

Configure Employee Health Screening

Set properties to specify the global maximum temperature thresholds in Fahrenheit and Celsius. Temperatures taken during a health screening are compared to the global temperature threshold, established by the company, to allow or deny entry.

Another property lets you decide whether to generate QR codes when a health verification is submitted. You can also determine whether to store temperature readings within the application, and establish overrides by location.

Add an email notification and configure an outreach notification for the daily health verification. Send the outreach notification on demand or as scheduled to employees before they return to the workplace. For more information, see Send notifications for daily health verification.

Set up Employee Health Screening properties

Decide whether you store temperatures recorded during screening events. Also set the maximum temperature threshold to use to determine whether it is safe for employees or visitors to enter the workplace.

Before you begin

Role required: sn_imt_monitoring.monitoring_admin or admin

About this task

Employers remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Employers' specific requirements.

Procedure

1. Navigate to **All** > **Employee Health Screening** > **Properties**.
2. Set the following property values.

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Property	Description
Clear health verification daily sn_imt_monitoring.clear_health_verification_daily	If the **Yes/No** check box is selec the **Response** field on health verification records is reset to **N** every day at the specified time. the Employee Health Verificatio Requirement is active, the empl requirement status is reset to **N Cleared**. This property is not enabled by default.
Time to reset health verifications sn_imt_monitoring.time_to_reset_health_verifications	Sets the time when health verifi responses are reset to **No** each The reset uses the local time fo each user. For example, if you e `17:00:00`, a user in Seattle ha verification reset at 5:00pm Pac time and a user in Boston has th verification reset at 5:00pm Eas time. The default time is midnight.
Limit health verification submissions to once per day. [sn_imt_monitoring.limit_health_verification_submission]	If the **Yes/No** check box is selec each employee can only submit health verification once per day **Yes/No** check box is cleared, th is no limit on the number of time day that an employee can subm health verification.
Enforce cleared status as condition for Health Screening. [sn_imt_monitoring.enforce_cleared_status_on_screen]	If the **Yes/No** box is selected, ea employee must have a **Cleared** to gain entry to a location. If the **No** box is cleared, a user's healt safety status does not automati deny entry.
Setting this value to true will track employee temperature. [sn_imt_monitoring.track_temperature]	If the **Yes/No** check box is clear temperature thresholds entered used only to determine whether employee can enter. This inform is not stored. By default, recordi storing temperatures is turned o
Disable temperature check for vaccinated employees. [sn_imt_monitoring.disable_temperature_check_for_vaccinated_employees]	If the **Yes/No** box is selected, vaccinated employees do not re a temperature check during hea screening. **Note:** The **Temperature** fi hidden during health scree for vaccinated employees.

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Property	Description
Setting this value to true will track employee PPE data. [sn_imt_monitoring.track_ppe]	If the **Yes/No** check box is clear PPE values entered are used on determine whether the employe enter. This information is not sto
Global property for employee temperature fever cutoff in Fahrenheit. Values at or above this temperature are considered a fever. [sn_imt_monitoring.temperature_threshold_fahrenheit]	Set this threshold based on wha you consider a safe temperature in Fahrenheit to allow returning employees into the workplace.
Global variable for employee temperature fever cutoff in Celsius. Values at or above this temperature are considered a fever. [sn_imt_monitoring.temperature_threshold_celsius]	Set this threshold for Celsius as described in the previous entry.
Setting this value to true will track visitor temperature data. [sn_imt_monitoring.track_visitor_temperature]	If the **Yes/No** check box is clear temperature thresholds entered used only to determine whether visitor can enter. This informatio not stored. By default, recording storing temperatures is turned o
Setting this value to true will track visitor PPE data. [sn_imt_monitoring.track_visitor_ppe]	If the **Yes/No** check box is clear the PPE values entered are used to determine whether the visitor enter. This information is not sto
Global property for visitor temperature fever cutoff in Fahrenheit. Values at or above this temperature are considered a fever. [sn_imt_monitoring.visitor_temperature_threshold_fahrenheit]	Set this threshold based on wha you consider a safe temperature Fahrenheit to allow visitors into workplace.
Global variable for visitor temperature fever cutoff in Celsius. Values at or above this temperature are considered a fever. [sn_imt_monitoring.visitor_temperature_threshold_celsius]	Set this threshold for Celsius as described in the previous entry.
Setting this property to true will show QR code for entry. [sn_imt_monitoring.show_qr_code]	If the **Yes/No** check box is selec a QR code is displayed when an employee agrees to the health verification form. A health monit at an entry point scans the code to review the employee's health requirements status. **Note:** Requirements are created in the Employee Readiness Core application more information, see Empl Health and Safety Status. The QR code can be printed or displayed on a mobile device w Now Mobile app.
Create entry request record when screener views Health Status record.	If the **Yes/No** check box is selected, a record is created

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Property	Description
sn_imt_monitoring.auto_create_request	in the Request for Entry table [sn_imt_monitoring_request_fo every time that a user with the sn_imt_monitoring.monitoring_ role views an employee's health safety status by scanning the Q code or manually looking up the employee. If the employee's hea and safety status is **Cleared**, the **Access Granted** field is set to **tr** otherwise it is set to **false**. This property is not enabled by default.

3. Click **Save**.

Override maximum temperature by location

Define overrides of the maximum temperature threshold specified in properties for particular locations. For example, a workplace in Mexico may have a higher setting because the climate is warmer. Also override the property for whether QR codes are generated.

Before you begin

Role required: sn_imt_monitoring.monitoring_admin or admin

Procedure

1. To define overrides for employees, navigate to **Employee Health Screening** > **Location Overrides**. To define overrides for visitors, navigate to **Employee Health Screening** > **Visitor Location Overrides**.
2. Click **New**.
3. On the form, fill in the fields.

Location Override form

Field	Description
Location	The location to set a different maximum temperature threshold.
Track temperature	Option that indicates whether temperature data is stored when screened at this location.
Track PPE	Option that indicates whether PPE compliance is stored when screened at this location.
Show QR Code **Note:** This field is not used for visitors.	Option that indicates whether to generate a QR code when an employee health verification is submitted.
Unit	Temperature measuring unit.

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Field	Description
Temperature	Employees or visitors must be at or below this temperature to be considered okay to enter the workplace.

4. Click **Submit**.

Modify the employee health verification page

The Employee Health Screening application provides an employee health verification that is ready to use. However, you can modify the verification if you want to change the criteria that employees must agree to.

Before you begin
Role required: catalog_admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
2. Click the Health verification catalog item.
3. In the **Description** field, update the criteria that employees must agree to.
4. Click **Update**.

Modify visitor notification emails

The Employee Health Screening application provides visitor notifications that are ready to use. However, you can modify the notifications if you want to customize them for your company.

Before you begin
Role required: admin

About this task
The Employee Health Screening application uses the following visitor notifications.

Visitor notifications

Notification	Description
Notify about scheduled visit	When the *sn_imt_core.send_email_to_visitor* property is enabled, this email is sent to the visitor when an employee invites them to the workplace. The email is sent immediately after the employee submits the invitation. The email contains a brief confirmation of the scheduled visit, including information about the date of the visit and the name of the employee who invited them. This notification is installed with the Employee Readiness Core application.
Ask for health related data from visitor	This email is sent to the visitor before their scheduled visit. The *sn_imt_core.days_to_ask_for_health_data* property sets when the email is sent. The email contains information about safety requirements and policies that the visitor must agree to follow. The visitor must respond `Yes` to the email to complete the Visitor Invitation Requirement from Employee Health and Safety Status.

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Visitor notifications (continued)

Notification	Description
	Note: To ensure that a visitor's requirement status is updated when the visitor responds to this email, set the *glide.user.trusted_domain* property to the default value (*). For more information, see **Note:** Inbound mail configuration. If you need to perform filtering on inbound emails, see Email filters. This notification is installed with the Employee Readiness Core application.
Visitor Invitation Criteria Met	This email is sent to the visitor, the employee who invited them, and anyone on the watch list on the invitation. It is sent after the visitor responds `Yes` to the health data email. This email confirms the upcoming visit.
Visitor Invitation Criteria Not Met	This email is sent to the visitor, the employee who invited them, and anyone on the watch list on the invitation. It is sent after the visitor responds No to the health data email. This email asks the visitor to reschedule their visit.

For more information about the properties used to configure the email notifications, see Set up Employee Health and Safety Status properties.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Click the visitor notification that you want to update.
3. In the What it will contain form section, edit the **Message HTML** field to customize the notification email.
4. To verify your changes, click **Preview Notification**.
5. Click **Update**.

Add message for users during health screening

Add an optional custom message for people to read during their health screenings with additional information or guidelines.

Before you begin

Role required: sn_imt_monitoring.monitoring_admin

Procedure

1. Navigate to **All** > **Employee Health Screening** > **Information Message**.
2. Click **New**.
3. Enter a name for the message in the **Name** field.
4. Select the users you want to receive the message in the **Audience** field.

   Example

   For example, you might have a message or guidelines specifically for users who work in the IT department.
5. Provide the text for the message in the **Message** field.

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Example
For example, you might want to advise users to remain in a certain location in the building.

6. Click **Submit**.

Result
Users in the selected audience will see this message when they complete their health screening.

Add an email notification for daily health verification

Add an Employee Readiness Surveys email notification to use for sending the survey link.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Review the existing **Daily Health Verification** email notification to familiarize yourself with the scripts and other settings.
3. Select **New**.
4. In the **Table** field, select the Health Verification Acknowledgements [sn_imt_checkin_health_verification_acknowledgement] table.
5. On the When to send tab, set the conditions.
   - In the **Send when** field, select **Record inserted or updated** from the drop-down list.
   - Set the **Conditions** criteria to **[User.Active][is][true]** and **[Acknowledgment Status][is not] [Acknowledged].**.
   - In the *Advanced condition* script, enter the following code:

     ```
     var employeeDailyHealthVerificationSysId = <your-sys_id>
     answer = current.employee_check_in.notification =
      employeeDailyHealthVerificationSysId;
     ```

     Replace the <your-sys_id> variable with the sys_id notification that you're adding by opening the additional actions menu, selecting **Copy sys_id**, and pasting the sys_id into the code line.

   The following figure shows example settings for the Daily Health Verification base system notification.

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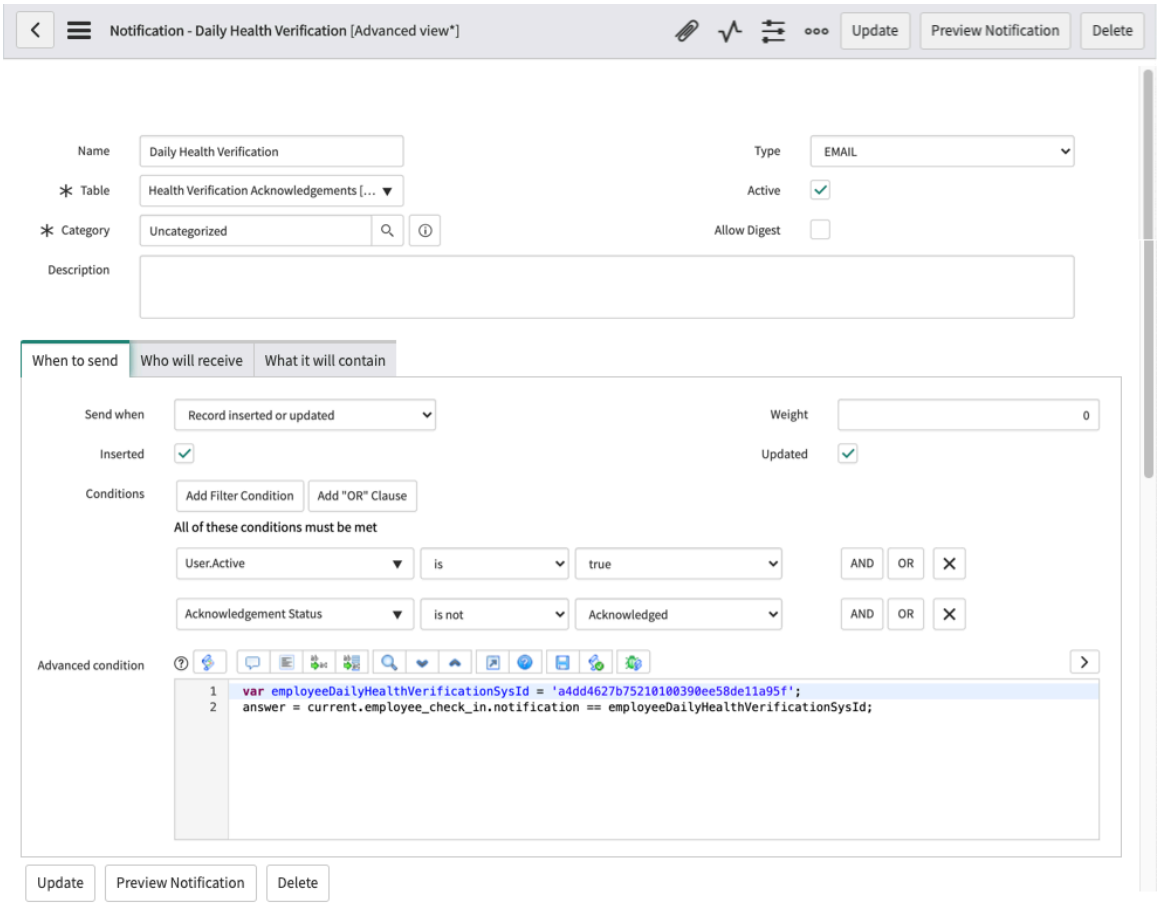

6. On the Who will receive tab, open **Users/Groups in fields** and select **Assigned to**.
7. On the What it will contain tab, complete the remaining information.
8. Select **Submit**.
9. In the Notifications list, open the notification that you added and select **Preview Notification**.
10. Review the notification and make any necessary modifications.
11. Select **Update**.

Verify your health status and compliance

Verify that you understand and will comply with your organization's safety requirements and policies before you can be allowed entry to the location.

Before you begin

Role required: none

About this task

Typically, you receive an email or a mobile notification from your organization with a link to the health verification form.

Note: If the ServiceNow® Customer Service Management application is activated, consumers and contacts can access the health verification form on the Consumer or Customer Service Portals. To set up the health verification form on the portals, allow external users access to "Health Verification" catalog item (KB0856301). For more information about using Customer Service Management with Employee Health Screening, see Integrate Customer Service Management with Safe Workplace applications.

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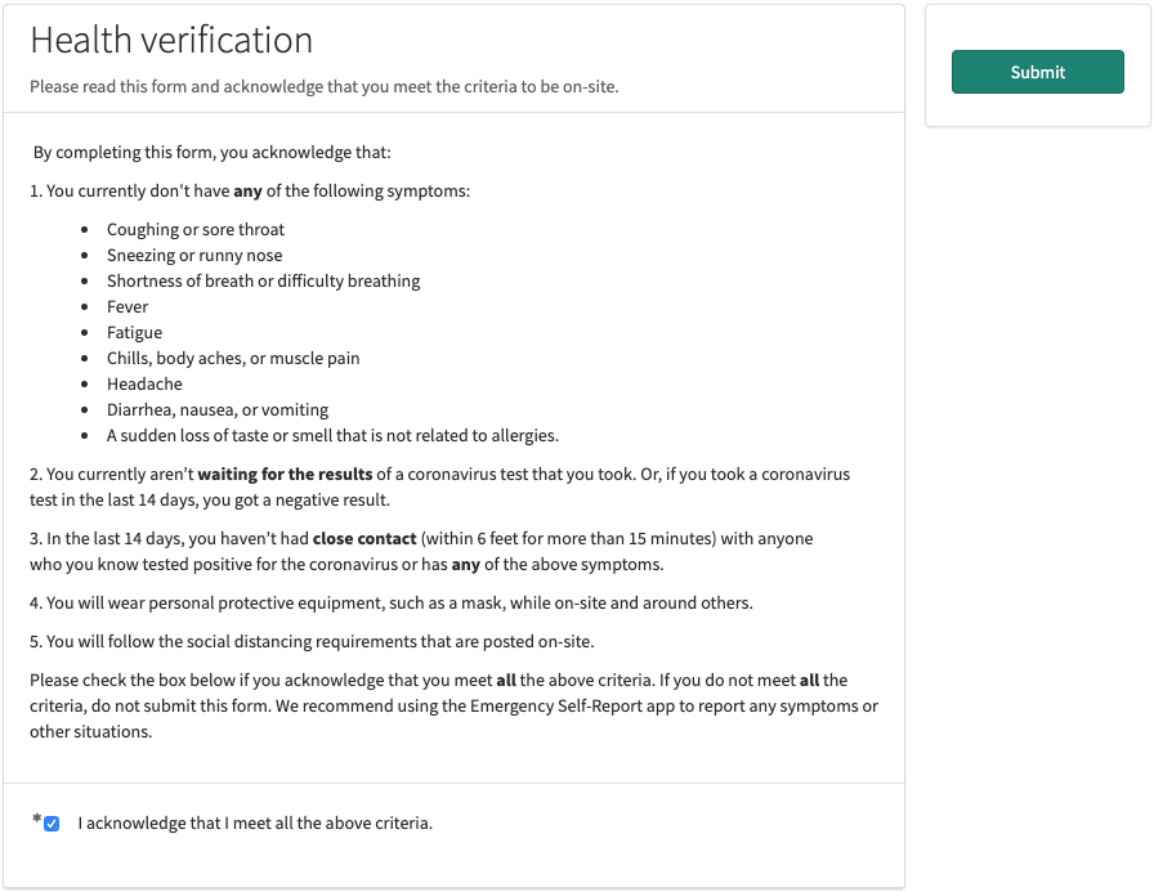
Procedure

1. Navigate to the health verification form.
   - Click the link provided by your organization.
   - In your organization's ServiceNow instance, navigate to **Employee Health Screening** > **Health Verification**.
   - In the Now Mobile app, navigate to **Health** > **Follow these safety practices** > **Verify my health**.

Health verification form



2. Carefully read the form and evaluate whether you can honestly answer that you agree.
3. Take one of the following actions.

Option	Description
If you agree to all statements	Select the **I acknowledge that I meet all the above criteria** check box.
If you can't agree to one or more of the statements	Exit the form without submitting it.

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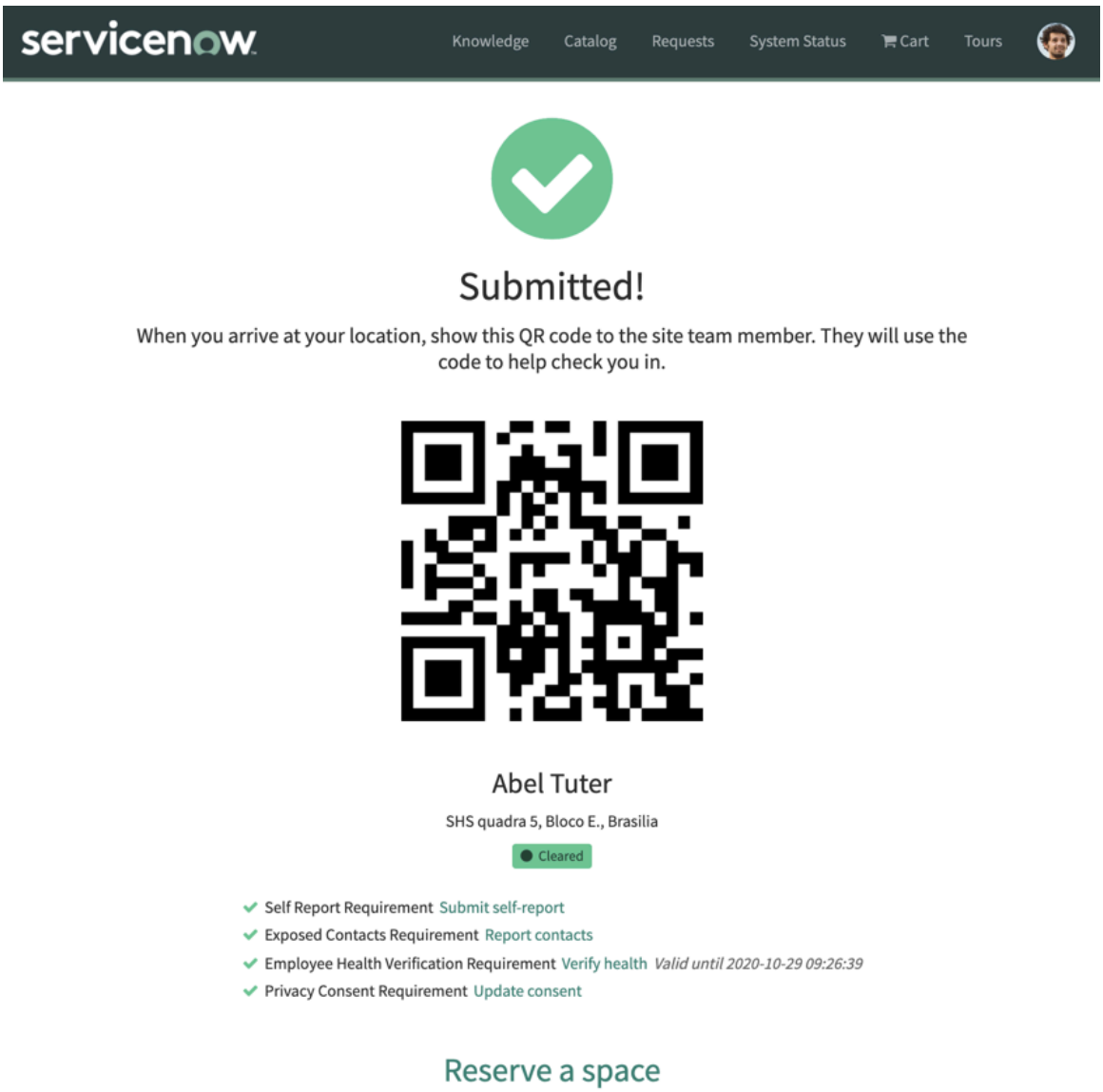
Confirmation screen



The confirmation screen shows your status for all of your organization's entry requirements. A large green check mark at the top of the page indicates that you've completed all requirements. To complete any unfulfilled requirements, click the link next to the requirement. Some requirements may not have a link. If you need help with completing the requirements, contact your organization.

Note: If your organization does not use QR codes, the confirmation screen does not display the instructions or the QR code.

4. **Optional:** If you're returning to an office and need to reserve a workspace, click **Reserve a space**.
   The link enables you to reserve a space for a specific day. If you want to reserve a space for a longer period of time, you must request it separately and wait for the request to be approved. For more information about reserving a workspace, see Making workplace reservations.

   Note: Reserving a workspace requires the sn_wsd_core.workplace_user role. If you do not see the link to reserve a space, contact your system administrator.

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What to do next

Your organization may have health monitors at entrances to check that you completed the entry requirements or to conduct a health screening before entry. If you received a QR code when you submitted the health verification, navigate to **Health** > **Prepare for arrival** > **My office entry code** in the Now Mobile app to show your QR code to the health monitor when you arrive at the location.

Related topics

- Add an email notification for daily health verification
- Configure Emergency Outreach notifications
- Review daily health verification acknowledgements

Conduct a health screen for entry

Use a health screen to verify a person's return requirement status to determine whether the person is able to enter the location.

Before you begin

Role required: sn_imt_monitoring.monitoring_user

About this task

Conduct a health screen before people enter a location, such as employees returning to the workplace or students returning to campus. Verify the person's return requirement status on your smartphone, tablet, or computer. Then complete and submit a health screening form to determine whether the person is able to enter the location.

The following procedure includes the steps your organization might use in setting up health screening. Some of the steps might not be applicable to your location.

Note: If the ServiceNow® Customer Service Management (CSM) application is activated, the health screen can be performed for CSM consumers and contacts. The customer service agent [sn_customerservice_agent] and consumer service agent [sn_customerservice.consumer_agent] roles can optionally be given to health screeners so that they can view additional CSM information on the health screening form, but these roles are not required for screening consumers and contacts. For more information about using Customer Service Management with Employee Health Screening, see Integrate Customer Service Management with Safe Workplace applications.

Procedure

1. Open the QR code scanning or requirement status page based on the type of device that you're using.

Platform	Action
Smartphone or tablet	From the Now Mobile **Health** screen under the **Health Screening** section, tap **Scan for Entry**. Scan the code that the person presents on their mobile device or on paper. If there is no QR code, enter the user ID in the **User ID** field, for example, `john.smith`.
Computer	Navigate to **Employee Health and Safety Status** > **View Employee and Visitor Status** and select the person.

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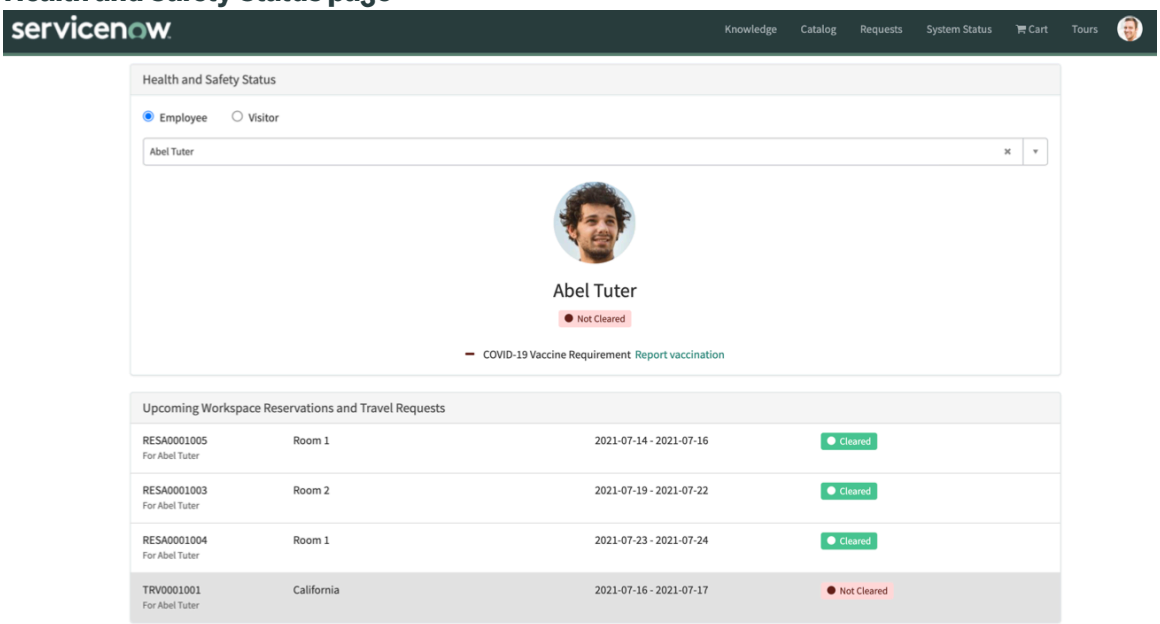
2. Review the requirement status to verify that the person is cleared to enter.

   Note: Requirements are created in the Employee Readiness Core application. For more information, see Employee Health and Safety Status.

   If the status is **Not cleared** and your organization's policy is to deny entry at this check point, provide the person with the next steps to take based on your organization's policy. Then, assist the next person in line.

Health and Safety Status page



3. Perform the health screen.

Platform	Action
Smartphone or tablet	Tap **Health Screen** on the Scan for entry page.
Computer	Navigate to **Employee Health Screening** > **Request Entry**. The screening form opens in a new browser tab.

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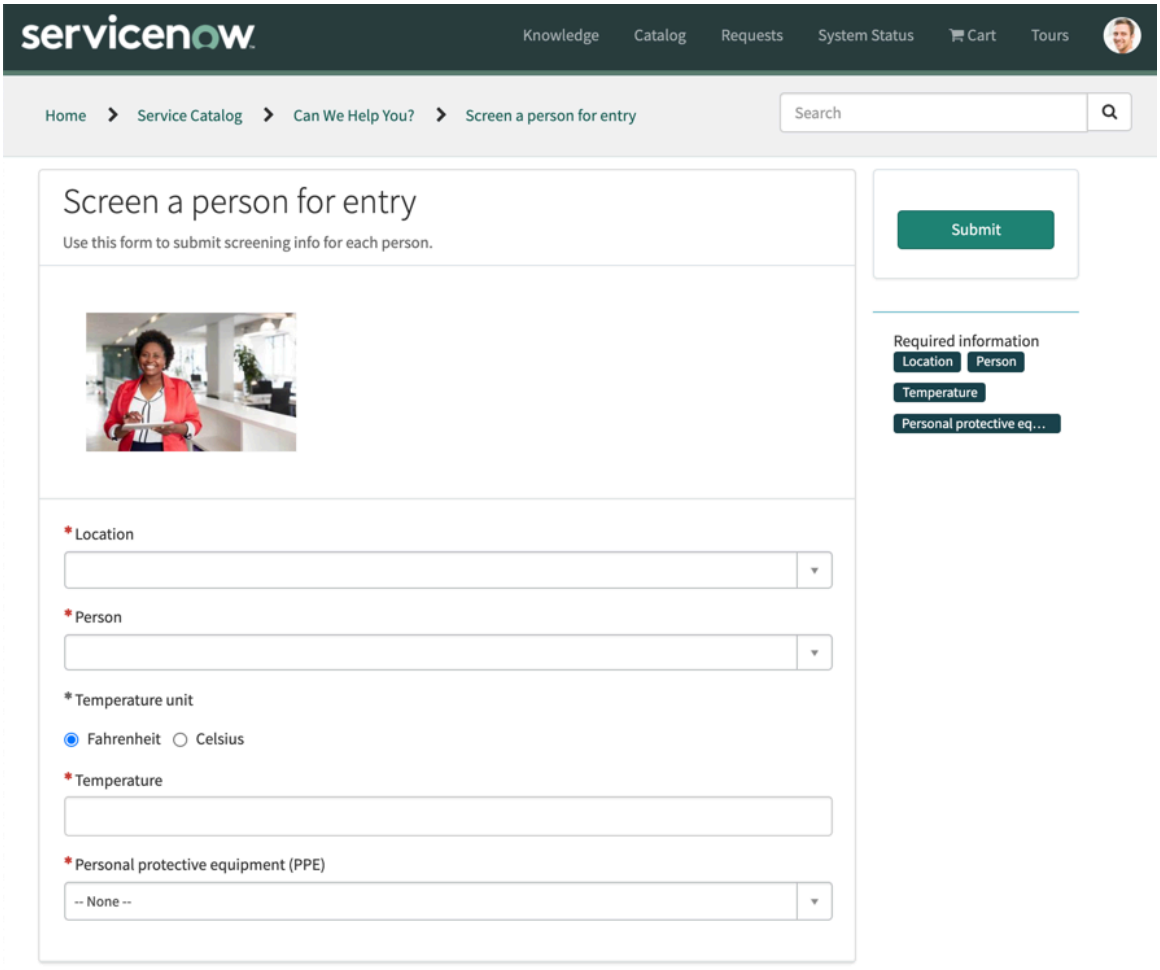

4. Take the person's temperature and fill out the screening form.

Screen a person for entry form

Field	Description
Location	Location of the health screening, such as the address of a workplace or campus.
Person	The person that you're screening.
Account	The account for the contact. This field appears only when the Customer Service Management application is activated and a contact is selected from the **Person** field. You must have the customer service agent role [sn_customerservice_agent] to view this field.
Suffix	The suffix for the consumer. This field appears only when the Customer Service Management application is activated and a consumer is selected in the **Person** field. **Note:** You must have the consumer service agent role [sn_customerservice.consumer_agent] to view this field.

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Field	Description
Temperature unit	Temperature unit assigned to this location.
Temperature	The numerical value of the person's temperature.
Personal protective equipment (PPE)	Whether the person is wearing PPE. Values are **Yes** or **No**.

5. Tap or click **Submit**.

Result
You receive a message that indicates whether to allow the person to enter. If the person does not pass the health screening, provide them with the next steps based on your organization's policy.

Screen a visitor for entry to the workplace

Verify the visitor's entry requirement status on your smartphone, tablet, or computer. Then complete and submit the health screening form to determine whether the visitor is able to enter the workplace.

Before you begin
Role required: sn_imt_monitoring.monitoring_user

About this task
A visitor must be invited before they can be screened for entry. If an uninvited visitor needs entry, a health screener can complete the invitation process and then begin screening. For more information, see Invite a visitor to the workplace.

Procedure
1. Open the requirement status page based on the type of device that you're using.

Option	Action
Smartphone or tablet	From the Now Mobile Health screen, under the **Health Screening** section, tap **Screen Visitor**.
Computer	Navigate to **Employee Health and Safety Status** > **View Employee and Visitor Status**. Choose the **Visitor** option and select the visitor.

2. Review the status to verify that the visitor is cleared to enter.
   If the status is **Not cleared** and your company policy is to deny entry at this check point, provide the visitor with the next steps based on your company policy. Assist the next visitor or employee in line.
3. Take one of the following actions to perform the health screen.

Option	Action
Smartphone or tablet	Tap **Screening** > **Request Visitor Entry**.
Computer	Navigate to **Employee Health Screening** > **Request Visitor Entry**.

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Option	Action
	The screening form opens in a new browser tab.

4. Take the visitor's temperature and fill in the screening form.

Screen a visitor for entry form

Field	Description
Visitor lookup	Visitor ID, which is generally `firstname.lastname`. When the visitor is selected, the form is automatically populated with information about the visitor, such as name, company, and host employee. **Note:** If you can't select the visitor from the list, the visitor hasn't been invited to the workplace. You must invite the visitor before you can screen them for entry.
Visitor's first name	Visitor's first name. This field is automatically populated when the **Visitor lookup** field is selected.
Visitor's middle name	Visitor's middle name. This field is automatically populated when the **Visitor lookup** field is selected.
Visitor's last name	Visitor's last name. This field is automatically populated when the **Visitor lookup** field is selected.
Visitor's company	The company that the visitor works for. This field is automatically populated when the **Visitor lookup** field is selected.
Host employee	The employee who invited the visitor. This field is automatically populated when the **Visitor lookup** field is selected.
Invitation setup date	The date that the host employee submitted the visitor invitation. This field is automatically populated when the **Visitor lookup** field is selected.
Visitor criteria	Indicates whether the visitor has completed the Visitor Invitation Requirement by agreeing to follow safety requirements and policies. This field is automatically populated when the **Visitor lookup** field is selected.
Location	Your location, which may be the address of the workplace.
Temperature Unit	Temperature unit assigned to this location. Change it if necessary.
Temperature	The numerical value of the visitor's temperature.
Personal protective equipment (PPE)	The choice of **Yes** or **No** from the list to record whether the visitor is wearing PPE.

5. Tap or click **Submit**.
You receive a message that indicates whether to allow the visitor to enter. If the visitor doesn't pass the health screening, provide them with the next steps based on your company policy.

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Monitor progress with the Employee Health Screen Overview dashboard

View the dashboard to monitor the entry requests and assess how the return to the workplace is progressing. Evaluate the number of entry requests, how many requests were denied entry, and for what reason.

Before you begin

Role required: sn_imt_monitoring.monitoring_admin

Procedure

Navigate to **Employee Health Screening** > **Overview**.
The Employee Health Screen Overview dashboard opens in a new browser tab.



Click any area of a chart to see the corresponding records.

View entry requests

Filter the list of entry requests that were completed to evaluate different areas of your return to work progress. Entry requests are the records submitted by the health screener for each employee who is screened before entry.

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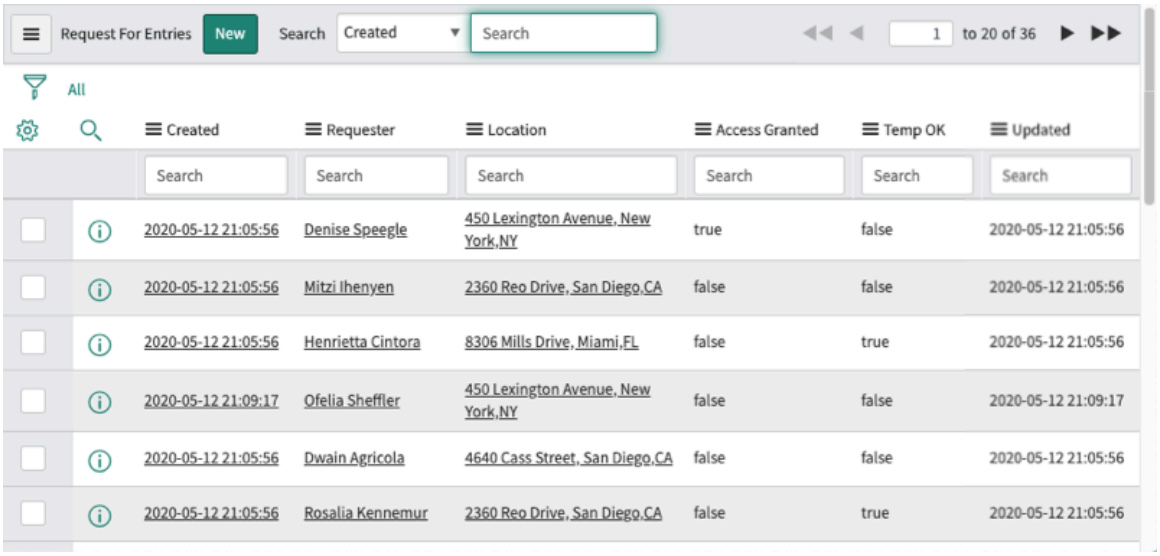
Before you begin
Role required: sn_imt_monitoring.monitoring_admin

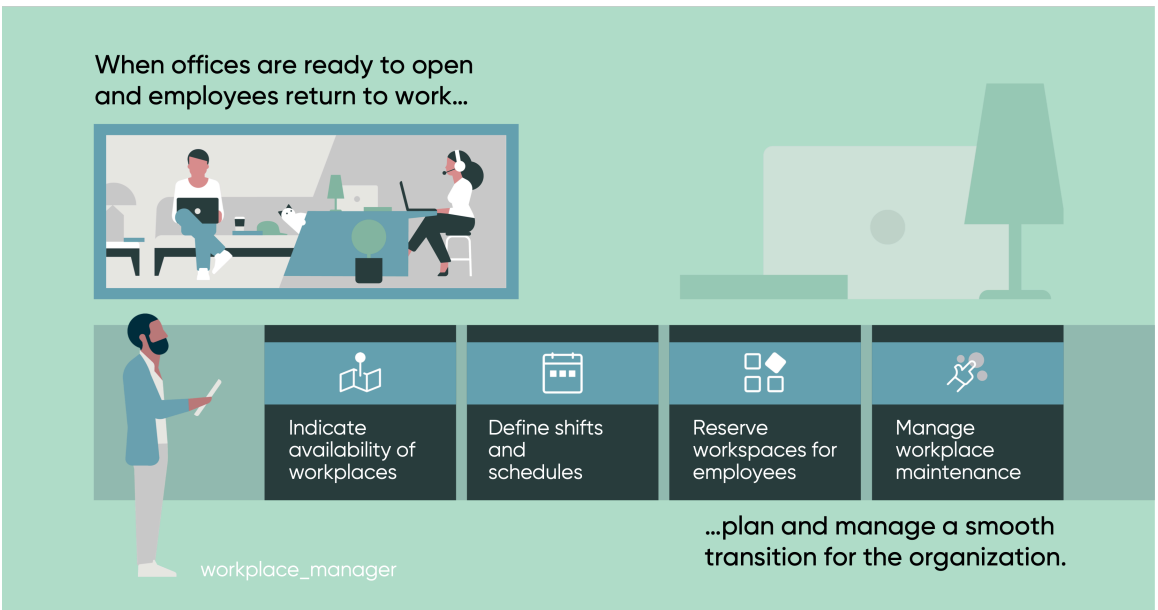
About this task
For example, you could see records for employees in San Diego who were not granted access, and compare the reasons for those denials. The reason for denial is either no personal protective equipment (PPE) or high temperature.

Procedure
1. Navigate to **All** > **Employee Health Screening** > **Entry Requests**.



2. To evaluate request for entry data, build a query or sort and group the list by the appropriate columns.

Workplace Core
Use the ServiceNow® Workplace Core application to create safer, managed processes for returning employees to the workplace and staying open. Establish distancing plans, shift assignments, and sanitation scheduling and manage workspace allocation in stages. The Workplace Core is also available as a core application in the Workplace Service Delivery suite.



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Space administration

Your organization's workplace administrators can add details for all workplace locations, such as:

- Areas such as employee workstations, conference rooms, and cafeterias
- Office buildings and campuses
- Regions of all locations

By tracking the availability of workspaces, workplace managers can plan and implement a phased return of employees to the workplace. For example, after the COVID-19 pandemic, your organization might want to allow a certain percentage (for example, 20%) of the total staff to return at a time at each office location, based on office configuration, local health recommendations, and other factors. Workplace managers can indicate workspace availability, leaving space for physical distancing. They can evaluate the situation periodically and make more workspaces available as conditions improve.

As a workplace manager, you can upload floor plans of your organization so employees can more easily view and select available spaces when they request workspace reservations.

Avoid large gatherings or long queues for locations at your workplace such as the cafeteria, gym, and entry and exit gates by defining arrival intervals and having employees schedule their arrivals.

Shift management

Workplace managers can create shifts for employees and schedule them for specific times and days. They can use this data to start planning for the occupancy levels of your workplaces by allocating employees and available workspaces to specific shifts.

For example, workplace managers can create a morning shift schedule with work hours of 08:00 to 13:00. They can then assign available workspaces to this shift based on organizational guidelines. These assigned workspaces can then be reserved for employees operating from the office during this shift.

Shift owners can review and modify the details of the shifts that they own. They can also view workspace reservations and requests made for the shifts they own.

Workspace reservations

Using the information about available employees and workspaces, workplace managers can reserve areas and workspaces for employees. Workplace managers can also generate reservations for multiple employees at once. Both the employee and the workplace manager are notified of reservations through email.

Employees can request workspace reservations when they are ready to return to the office. Using interactive floor plans, they can choose to reserve workspaces for a specified date range, a single day, or a few hours. Depending on your organizational guidelines, reservation requests might require an approval for confirmation.

If the workplace profiles of all employees are set up, the application automatically assigns available workspaces for employees based on their date and time selection when they make a reservation.

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For more advanced workplace reservation options, use Workplace Reservation Management in the Workplace Service Delivery suite. For more information, see Workplace Reservation Management.

Workplace tasks

Workplace managers can monitor maintenance activities that are scheduled in the workplace for each shift. They can also schedule planned or on-demand maintenance tasks, and generate reports to track the progress of these activities.

Workplace Dashboard

Using data visualizations, you can evaluate the availability of workspaces and occupancy levels of your office locations, and monitor the progress of workplace tasks on the workplace dashboard.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Use with other Safe Workplace suite applications

Workplace Core is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.

All Safe Workplace suite applications are available in the ServiceNow Store.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Install Workplace Core

You can install the Workplace Core application if you have the admin role. This application includes optional demo data.

Before you begin

Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

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Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

About this task

The following components are installed with installation of the Workplace Core application:

- Roles
- Tables

See Components installed with Workplace Core for more information.

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed.

   Installing your application also automatically installs the dependent applications or plugins if they are not installed already.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.
   Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Note: If you don't load the demo data for a store application during installation, it is not available to load later.

6. Click **Install**.

Components installed with Workplace Core

Several types of components are installed with installation of the Workplace Core application, including user roles, scheduled jobs, tables, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed with Workplace Core

Roles installed with Workplace Core

Role title [name]	Description	Contains roles
Workplace admin [sn_wsd_core.admin]	• Sets up data about the workplace • Has complete access to the application	sn_wsd_core.workplace_manager

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Roles installed with Workplace Core (continued)

Role title [name]	Description	Contains roles
Workplace manager [sn_wsd_core.workplace_manager]	• Reserves spaces at the workplace • Links employees and shifts to spaces • Manages preventive maintenance tasks	• sn_wsd_core.workplace_exposure_analyst • schedule_admin • template_editor_global
Workplace exposure analyst [sn_wsd_core.workplace_exposure_analyst]	Identifies potentially exposed employees in the ServiceNow® Emergency Exposure Management application using workspace reservations.	None
Workplace shift owner [sn_wsd_core.workplace_shift_owner]	• Has edit access to the shifts that they own. • Has edit access to details such as shift schedules, associated users, and spaces of owned shifts. • Has read-only access to workplace tasks of owned shifts. • Can view workspace requests and reservations for owned shifts	None

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Roles installed with Workplace Core (continued)

Role title [name]	Description	Contains roles
Workplace user [sn_wsd_core.workplace_user]	• Requests area or workspace reservations from the Workplace Service Portal or the Now® Mobile app • Schedules arrival to workplace locations using the Workplace Service Portal or the Now® Mobile app **Note:** From Workplace Core v1.3.2 onwards, this role is required for employees to request reservations from Workplace Service Portal.	None
Workplace core writer [sn_wsd_core.task_writer]	• Create, read, update, and delete Workplace Tasks. • Create, read, update, and delete Task templates.	sn_wsd_core.task_reader
Workplace core reader [sn_wsd_core.task_reader]	Has permission to read all workplace tasks.	None
Workplace knowledge base writer [sn_wsd_core.kb_writer]	• Create, view, publish, and update	None

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Roles installed with Workplace Core (continued)

Role title [name]	Description	Contains roles
	knowledge base articles. • Retire and republish knowledge base articles.	

Scheduled jobs installed with Workplace Core

Scheduled jobs installed with Workplace Core

Scheduled job	Description
Find upcoming reservation periodically	Finds upcoming workspace reservations between 4–8 hours from the time when this job is executed and sends email notifications to those employees with reservations. By default, this job is set to run every 4 hours.
Reservation check-in & check-out	Performs the following actions. • Notifies employees via email to check in a reservation. • Notifies employees via email to check out a reservation. • Auto cancels a reservation if it is not checked in within 30 minutes after the employee is notified. • Auto checks out a reservation if it is not checked out an hour after the reservation end time.

Tables installed with Workplace Core

Tables installed with Workplace Core

Table	Description
Area [sn_wsd_core_area]	Stores the list of areas on office floors.
Arrival Entry [sn_wsd_core_arrival_entry]	Stores the list of scheduled arrival entries of the employees.

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Tables installed with Workplace Core (continued)

Table	Description
Arrival Schedule [sn_wsd_core_arrival_schedule]	Store the list of scheduled arrival intervals created by the workplace manager.
Building [sn_wsd_core_building]	Stores the list of office buildings.
Campus [sn_wsd_core_campus]	Stores the list of office campuses.
Floor [sn_wsd_core_floor]	Stores the list of office floors.
Html Signing Template [sn_wsd_core_html_signing_template]	Stores the templates to sign off on a planned task and generate a PDF.
Location Shift [sn_wsd_core_m2m_location_shift]	Stores the relationship between shifts and workspace locations.
Planned Task Definition [sn_wsd_core_planned_task_def]	Stores the planned task definitions that workplace managers create for workplace tasks.
Region [sn_wsd_core_region]	Stores the list of regions of workplace locations.
Reservation [sn_wsd_core_reservation]	Stores the relationship between shifts, employees, and workspaces.
Shift [sn_wsd_core_shift]	Stores the list of shifts.
Site [sn_wsd_core_site]	Stores the list of sites of the organization.
Space [sn_wsd_core_space]	Stores the list of workspaces of the organization.
Space Type [sn_wsd_core_space_type]	Stores the list of space type configuration created by the workplace manager.
Space Staging [sn_wsd_core_space_staging]	Acts as an interim placeholder table for imported data about spaces.

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Tables installed with Workplace Core (continued)

Table	Description
User Shift [sn_wsd_core_m2m_user_shift]	Stores the relationship between shifts and employees. For existing users who are upgrading from the first version of the app, ensure that you have the **User** field as the display value. For more information, see Select a field as the table display value.
User Workplace Profile [sn_wsd_core_workplace_profile]	Stores the relationship between employees and their designated workspaces.
Workplace Client Role Rule [sn_wsd_core_client_role_rule]	Stores the workplace client role assignment rules created for employees.
Workplace Location [sn_wsd_core_workplace_location]	Parent table for all workspace entity tables such as Regions, Sites, Campuses, Buildings, Floors, Areas, and Spaces.
Workplace Request [sn_wsd_core_workplace_request]	Stores the workplace reservation requests created by employees.
Workplace Task [sn_wsd_core_workplace_task]	Stores all the workplace tasks created for shifts. If you are upgrading from version 1.1.1 or earlier of the app, ensure that the **Default Value** field is empty for the workplace_task_type column of this table. For more information on how to modify the default display value of a table column, see Specify a default field value.
Workplace rooms [sn_wsd_core_room]	Extends the Space [sn_wsd_core_space] table. It holds the reservable items of a room that are available to reserve.

Properties installed with Workplace Core

Customize the properties available with Workplace Core.

These properties are available for Workplace Core.

Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Core

Property	Description
sn_wsd_core.AUTO_ASSIGN_LOCATION	Enables auto-assignment of workspaces when employees make workspace reservation requests. • Type: true|false • Default value: false

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Properties for Workplace Core (continued)

Property	Description
	Note: Once this feature is enabled, the fields related to workplace locations such as **Area**, **Space preference**, and **Space** do not appear on the Workspace Reservation form. Enable this feature only if all employees have a designated workspace in their user profiles in the User Workplace Profile [sn_wsd_core_workplace_profile] table. For more information, see Mapping employees to their designated workspaces.
sn_wsd_core.CANCEL_RES_BUILDING	Determines whether the reservations made for spaces should be canceled based on the value of the **Is reservable** field. • Type: true|false • Default value: false If this property is set to **true**, then the application cancels all the workspace reservations that are made for the areas and spaces of those buildings or floors for which the value of the **Is reservable** field is set to **false**.
sn_wsd_core.CLEANING_TASK_MAX_DURATION	Determines the duration (in days) by when you want the pre-cleaning and post-cleaning tasks to be executed. • Type: Integer • Default value: 7
sn_wsd_core.floor_plan.portal.show_non_reservables	Determines whether non-reservable workspaces appear in grey on the floor plan in the Workplace Service Portal. • Type: true|false • Default value: false **Note:** Changing this value to true can negatively affect performance.
sn_wsd_core.floor_plan.portal.show_reservation_details	Determines whether reservation details appear when users point to booked spaces on the floor plan in Workplace Service Portal.

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Properties for Workplace Core (continued)

Property	Description
	• Type: true|false • Default value: false
sn_wsd_core.REQUEST_MAX_DURATION	Determines the maximum number of days that an employee can request a space reservation for at one time. This property is applicable when an employee requests a space reservation for multiple days. • Type: Integer • Default value: 7
sn_wsd_core.show_book_uber	Determines the visibility of the **Book Uber** button on the Now® Mobile app. If this property is set to **true**, then employees can select **Book Uber** from their confirmed reservations on their mobile devices. Users are redirected to the Uber mobile app. • Type: true|false • Default value: false
sn_wsd_core.wsd_inbound_email	Checks for emails that are received for the ServiceNow® Workplace Service Delivery and Workplace Case Management applications. This property has been renamed from the *sn_wsd_case.wsd_inbound_email* property in Workplace Case Management version 1.0.1. This property is available only for Workplace Safety Management 2.0.3 or later. • Type: String • Default value: askwsd@example.com • Location: System Property [sys_properties] table
sn_wsd_core.floor_transform_map	Enables you to configure customized transform maps. • Type: string • Default value: 2528fbf70f201010dbc3d2d92f767e04

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Properties for Workplace Core (continued)

Property	Description
sn_wsd_core.ENABLE_RSV_CHECK_IN	Enables reservation check-in and check-out via email. If this property is set to **true**, then employees can check in and check out a reservation. • Type: true|false • Default value: false
sn_wsd_core.dfx.rebuild_cache.max_floors	Enables you to specify the maximum number of floors to build for an entity cache at any time. • Type: Integer • Default value: 20
sn_wsd_core.CANCEL_RES_LOCATION	Enables you to cancel all future reservations made on a location level. Set the **Is reservable** field to **false** for the location. • Type: true|false • Default value: false
sn_wsd_core.ALLOW_USER_SHIFT_FILTERING	Enables a user to create shift-based reservations only if the user is part of that shift. • Type: true|false • Default value: false
sn_wsd_core.ALLOW_AVAILABILITY_FILTERING	Displays only the available buildings and floors in the reservation record producers. • Type: true|false • Default value: false **Note:** If the property is set to **true**, then the selected workplace locations take a longer time to load.
sn_wsd_core.MULTI_DAY_AVAILABILITY	Displays only the available areas and spaces in multi-day reservation record producers. • Type: true|false • Default value: false

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Properties for Workplace Core (continued)

Property	Description
	Note: If the property is set to **true**, then the selected workplace locations take a longer time to load.
ARRIVAL_REQUEST_MAX_FUTURE_DAYS	Enables you to specify the maximum number of days in the future until when employees can schedule their arrival. • Type: Integer • Default value: 7

Providing your workplace data

In the Workplace Core application, provide data related to your workplace locations so you can efficiently assign shifts to employees and designate workspaces for these shifts.

Workspace Record

The information available for each workspace record is:

- Region
- Site
- Campus
- Building
- Floor
- Area
- Space

Each designation should use a unique identifier.

Entering data for several work sites

Large organizations can use spreadsheets to store shared location data such as regions, buildings, sites, eliminating manual re-entry for each workspace. You can either export the information you have already entered into the application into a spreadsheet or use that information in an existing workspace spreadsheet. You can then import the spreadsheet that contains the full workspace data into the application in bulk form.

- If you have an existing spreadsheet, you can manually convert the column headers and data of the global information to match the ServiceNow record names and identifier numbers. You can then do a bulk import of that data into the Workplace Core application so you can assign workspaces.

  For example, say your organization's spreadsheet uses the name "Location" for Sites or "Bldg 1" for every building 1 on every site. You have to change the spreadsheet column header "Location" to "Sites" and change each "Bldg 1" to the unique identifier from the Workplace Core application records.

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- If you don't have an existing spreadsheet, you can enter the repeated global information that you don't want to have to input manually for each space. The data for each field should have a unique identifier. You can then export the information from the application into a spreadsheet where you have to input only the space information manually.

Floor plans

The ServiceNow AI Platform supports Drawing eXchange Format (.dxf) files for floor plans. You can select the layers you need for end-user floorplans and configure the attributes (tags) you want assigned to fields. For information about how to export an AutoCAD .dwg file to a Drawing eXchange Format (.dxf) file, see the documentation for your version of AutoCAD.

Before uploading a .dxf file, work with your AutoCAD designers to verify the following:

- The file uses block references and not single-line or multi-line text for space labels.
- The blocks attributes have human-understandable tags.
- The block references have attribute values appropriately set.

Note: Using blocks is highly recommended. Don’t use text objects.

Uploading a floor plan creates a floor record. All the workspaces of the floor are automatically added to the Spaces related list of the floor record.

Create records for your workplace data

Create individual records of your workspaces, floors, office buildings, and workplace locations within the Workplace Core application. Either insert new data or add records to the existing workplace data.

Before you begin

Ensure that you have the following details:

- Workplace data for your organization.
- Data of workspaces that can be marked as available.

Important: In the Workplace Service Delivery Suite, from Workplace Core version 2.5.3, the **Space type (space_type)** choice field is depreciated. After the upgrade, Space types are configured in the **Space Type Configuration**. The **Space type (space_type)** field is migrated as **Space type (location_type)** field in the Space table [sn_wsd_core_space]. Customers having customization on the depreciated **Space type (space_type)** field are advised to manually migrate their flow to use the new **Space type (location_type)** field. A new fix script, **Populate Location Type from Space Type**, is introduced to execute the schedule job, **Populate location_type from space_type**, on the Space table [sn_wsd_core_space] to migrate the depreciated **Space type (space_type)** field value to the new **Space type (location_type)** field.

Role required: sn_wsd_core.admin

About this task

If you have a small number of workspaces, you can enter information individually for each workspace down to the Spaces level.

If you have many work sites, you might want to do the following:

1. Create a skeleton of repeated global information.
2. Add the individual spaces information in a spreadsheet.

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3. Import the spreadsheet into the application.

   For more information on importing, see Configuring spreadsheets to import workplace data.

If you have floor plans, you can create records of data until the Buildings level. Uploading the floor plans loads the data of floors and of the spaces associated with these floors.

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Space Administration**.
2. Select the applicable module.
   Create the records in the following order:
   - Regions
   - Sites
   - Campuses
   - Buildings
   - Floors
   - Areas
   - Spaces

   For example, if you want to locations of your offices, select **Sites**.
3. On the form, fill in the fields.

   Note:
   - The visibility of some of the following fields depends on the module that you selected.
   - You can leave a field that does not apply to your organization empty.

   The fields on the form differ based on what module you selected. For example, the following form is for Building.

New record form

Field	Description
Name	Name of the workplace. Ensure that you enter a unique name. For example, if the **Building** field is set to **1C**, and if the **Space** field is set to **WST 1C 1601**, then an appropriate value for the **Name** field can be `1C-16` **Note:** Do not use workplace locations with the same name because it affects the reservation process.
Region	Region where the office is located. If your organization is located at several regions, select that region where the office that you are adding is located.
Site	Location of the office campus. If there are several sites in a region, select that site where the office that you are adding is located.

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Field	Description
Campus	Name of the campus where the office operates. If there are several campuses in a site, select that campus where the office that you are adding is located.
Building	Name of the office building for this workspace. If there are several buildings in a region, select that building where the office that you are adding is located.
Floor	Name or number of the floor where this workspace is present.
Area	Name of the area on the office floor.
Space type	Type of the office space. To configure a new space type, see Add a space type configuration.
Active	Option to indicate that this space is active.
Is reservable	Option to indicate that the spaces for this workplace entity are available for reservation. For example, if you do not mark a Building as reservable, then none the floors, areas, and spaces of this building would be available for reservation.
Latitude	Latitude of a campus or a building. The latitude is displayed in the Workplace Service Portal Location directory map.
Longitude	Longitude of a campus or a building. The longitude is displayed in the Workplace Service Portal Location directory map.

4. Click **Submit**.

What to do next

- If you have floor plans for your workplace, you can upload them to create and display floor and workspace data. For more information, see Upload a workplace floor plan.
- If you are using a spreadsheet to enter and import bulk data for workspaces, see Configuring spreadsheets to import workplace data.
- If you have added all of your workplace data, you can define employee shifts. For more information, see Define shifts for your workplace.

Upload a workplace floor plan

Upload Drawing eXchange Format (.dxf) files of floor plans that you can configure and use to reserve space for your employees.

Before you begin

Use workplace floor maps to find and reserve a space within Workplace Core. To view the maps in the Location directory and within Workplace Reservation Management, use Mappedin and Indoor Mapping. For more information on how to use floor maps, refer to Workplace Space Mapping.

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To avoid issues while rendering your floor plan, verify that the dxf.json attachment size is 5 MB or smaller. To view the size, download the dxf.json file and view the file properties. If the file size is larger than 5 MB, you can:

- Work with your AutoCAD designers to ensure that spaces are represented as blocks (not single or multi-line text).
- Ensure that the block reference attributes are appropriately set and try to import the dxf.json file again.
- Set the *com.glide.attachment.max_get_size* property to a size that is greater or equal to the dxf.json file size. For more information, see Administering attachments.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Upload Floor Plan**.

   In Workplace Core version 2.19.0 and above, the navigation path for **Upload floor plan** is not available in the application context menu search **All** > **Workplace Core**.

   In Workplace Core version 2.18.11 and later, the navigation path is available in the application context menu search **All** > **Workplace Core** > **Upload floor plan**.

2. On the form, fill in the fields.

Manage Workplace Floor form

Field	Description
Number	A unique number automatically generated by the application that identifies the floor plan.
Name	Name of the floor plan. **Note:** Be specific and have a consistent naming convention when naming your floor plans.
Region	Geographic location of the building the floor plan represents. Select the Lookup using list icon to view a list of regions you can select.
Site	The location of the office or campus within a region. Select the Lookup using list icon to view a list of sites you can select.
Campus	Name of the campus if you have multiple buildings at a site.
Building	Name of the specific building if you have multiple buildings at a campus.
Active	Option to indicate the floor is active.

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Field	Description
Is reservable	Option indicating whether the space manager can reserve this plan for employee use.
Managed by group	The group that manages the space reservation for the floor plan. Select the Lookup using list icon to view a list of groups you can select.
Managed by	The workplace manager of the group that manages the space reservation for the floor plan. Select the Lookup using list icon to view a list of group managers you can select.

3. Select the attachment icon and upload your Drawing eXchange Format (.dxf) file.
   After you attach your .dxf file and import the floor plan, the .dxf file converts to a dxf.json file in your attachments. Don't remove any of these files or your floor plan does not appear. Also, the dxf.json file size must be 5 MB or smaller. Try selecting fewer layers from your .dxf file during the import process.
4. Select **Next**.
5. In the Select layers column on the right, select the layers that you want to appear the plan.
   For example, you might not want electrical rooms, kitchens, storage closets, or other elements to appear on the floor plan when it renders.
6. Select **Render**.
   The floor plan appears under the **Preview plan** tab. Use your cursor to zoom in and out of the floor plan.
7. Select **Next**.
8. On the form, fill in the fields.

Assign tags to fields

Field	Description
AutoCAD tag	The tag you want to map to your space fields. Tags identify spaces on the floor plan and come from the uploaded .dxf file. The tags that appear are the ones you selected in the **Select layers** column. **Note:** If you do not see any AutoCAD tags, you can use AutoCAD software to change text or text objects into block references.
Space Field	The field in the Space [sn_wsd_core_space] table with which you want to associate the tag. For example, you could associate an

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Field	Description
	attribute named ROOM_NAME with the **Name** field and give it a higher order so it is the second part of the Name. The Space Field represents a specific location on the floor plan that you can assign to an employee.
Order	Determines the order of processing for your AutoCAD tag to Space Field mapping. **Note:** Lower numbers process first.

9. Select **Submit**.

Result
A new floor record is created with the floor plan attached to it. The Spaces related list is populated with all the workspaces of this floor.

Update a workplace floor plan

Update a workplace floor plan by uploading a new plan.

Before you begin
Role required: sn_wsd_core.workplace_manager

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration** > **Floors**.
2. Select the floor you want to update.
3. Select the **Update floor plan** related link.
4. Select **Manage Attachments**, delete the current floor plan file, and attach the new floor plan file.
   You can have only one .dxf file uploaded at a time.
5. Select **Next**.
6. In the Select layers column, select the layers that you want to appear on the floor plan.
   For example, you might not want electrical rooms, kitchens, storage closets, or other elements to appear on the floor plan when it renders.
7. Select **Render**.
   The floor plan appears under the **Preview plan** tab. Use your mouse to zoom in and out.
8. Select **Next**.
9. On the form, fill in the fields.

Assign tags to fields

Field	Description
AutoCAD tag	Tags from the uploaded .dxf file identify spaces on the floor plan. The tags that appear are those that you selected in the **Select layers** column.

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Field	Description
	Note: If you do not see any AutoCAD tags, you can use AutoCAD software to change text or text objects into block references.
Space Field	The field in the Space [sn_wsd_core_space] table with which you want to associate the tag. For example, you could associate an attribute named ROOM_NAME with the **Name** field and give it a higher order so it becomes the second part of the name.
Order	Determines the order of processing for your AutoCAD tag to Space Field mapping. **Note:** Lower numbers process first.

10. Select **Preview Changes** and in the **Preview changes** tab, review the changes you are going to make before you commit them.
11. Select **Submit**.

Result

The following changes occur:

- Map values are filled in.
- Existing spaces that no longer match are deleted.
- If old spaces have been renamed, the new names replace the old ones.
- Any reservations are deleted.

A original floor record is updated with the floor plan attached to it. The Spaces related list is also updated. To view your changes, go to **Floor Plan Update Logs**.

View your workplace floor plan update logs

After updating your workplace floor plan, you can view all changes made.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Administration** > **Floor Plan Update Logs**. Logs appear for each floor plan updated with date and timestamps.
2. Select the **Created date** link to view the log record.
3. Select the **Floor** link to view the floor record.

Configuring spreadsheets to import workplace data

Doing a bulk import of the data of all your workspaces into the Workplace Core application through a spreadsheet enables you to avoid manually entering redundant data for each workspace, which saves time and effort.

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By using a spreadsheet that contains the global information for your work sites, you can enter only the distinguishing space information instead of manually repeating information such as region, site, building, and floor. You can either create an Excel spreadsheet from the data already entered into the Workplace Core application or modify an existing workplace spreadsheet.

Configure an existing workspaces spreadsheet

Customize the information in your organization's existing workspace spreadsheet to avoid having to manually enter repeated information for each workspace. You can then import the data into your ServiceNow instance.

Before you begin

Role required: sn_wsd_core.admin

About this task

If you have a spreadsheet containing your organization's workspaces data, you need to customize it to match the record information in your ServiceNow instance.

This example describes how to modify the floor information for your workspace data. Repeat these instructions to replace the fields for your building, campus, site, and region, as appropriate.

Procedure

1. Modify the data in the spreadsheet to match the record information in your ServiceNow instance.

   a. Navigate to **Workplace Safety Management** > **Space Administration** > **Floors**.

   b. Search for the desired floor record and open it.

   c. Copy the value of the **Number** field.

   d. Paste the value in place of "Floor 1" in the Excel spreadsheet.

      The example uses the following sample entry for workspaces that belong to Floor 1 of Building 1 at Florida Campus 2, Florida, USA:

      - FLOR0001694 represents Floor 1
      - BLDG0001028 represents Building 1
      - CMPS0001013 represents Florida Campus 2
      - SITE0001007 represents Florida
      - RGIN0001002 represents USA

      Note: You can exclude the **Area** column as it is not mandatory. Enter a dummy value in the column instead of leaving it empty.

A	B	C	D	E	F	G	H	I
Name	**Area**	**Floor**	**Building**	**Campus**	**Site**	**Region**	**Is reservable**	**Active**
B 1F 1 001		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE
B 1F 1 002		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE
B 1F 1 003		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE
B 1F 1 004		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE

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2. In your workspaces spreadsheet, add individual workspace information in the **Name** column.
3. Save your spreadsheet.

Create a workplace data spreadsheet

Create a Microsoft Excel spreadsheet from the data you entered into the Workplace Core so you can avoid having to manually enter global information such as the site or building names for each workspace. You can then import the data into your ServiceNow instance.

Before you begin

Role required: sn_wsd_core.admin

About this task

If you have a large number of work sites, consider creating a spreadsheet that you can then import into your ServiceNow instance to avoid having to manually enter global information such as the site or building names for each workspace.

Note: If you already have an existing workspaces spreadsheet for your organization, follow the instructions in Configure an existing workspaces spreadsheet to customize it for exporting the data.

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Space Administration**.
2. Select the module for the smallest unit for which you want to repeat the data.

   For example, if you have created global information records of regions, sites, buildings, and floors, you would select **Floors**.

3. **Optional:** Customize the columns to be displayed.
   For example, you can choose to hide the **Campus** column if your organization does not have campuses by entering a dummy value instead of leaving it empty.
4. Export the data by holding and selecting (or right-clicking) on any column, selecting **Export**, and selecting **Excel (.xlsx)**.
   Data is exported from the application so that you can download it as an Excel file.
5. Select **Download**.
6. In your workspaces spreadsheet, add individual workspace information in the **Name** column.
7. Save your spreadsheet.

What to do next

Import your workspaces data from an Excel spreadsheet

Import your workspaces data from an Excel spreadsheet

Import your workspaces data from an Excel spreadsheet into the Workplace Core application.

Before you begin

Complete Configuring spreadsheets to import workplace data.

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Existing table**.

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3. In the **Import set table** field, select **Space Staging [sn_wsd_core_space_staging]**.
4. In the **Source of the import** field, select **File**.
5. Select **Choose File** and select the source Excel spreadsheet.
6. **Optional:** Specify the worksheet number in the **Sheet number** field and header row number in the **Header row** field.
7. Select **Submit**.
   The imported data is now available in the new Import Set table.
8. Select **Run Transform**.

   Important: Ensure that the Import set field shows sn_wsd_core_space_staging and the selected map is Space Transform map - sn_wsd_core_space.

9. Select **Transform**.
10. **Optional:** Verify that the data records were imported into the Spaces table by navigating to **Workplace Safety Management** > **Space Administration** > **Spaces**

Related topics

Run an import

Create a transform map

Add a space type configuration

Configure the different types of workspaces available in a workplace. You can add spaces based on different space types (Workspace/Desk). Space type enables employee to identify the different types of workspace available on a floor

Before you begin

Role required:sn_wsd_core.admin or sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Space type configuration**.
   The Space Types page opens.
2. Select **New**.
3. On the form, fill in the fields.

Space Type form

Field	Description
Name	Descriptive name of the space type.
Code	Code for the space type. The code can also be a name.
Table	Table of the space type. The field is automatically set to **Space [sn_wsd_core_space]**. If the space type is a room, select **Room [sn_wsd_core_room]**.
Application	Application of the space type. This field is automatically set. For example: Workplace Concierge

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Field	Description
Active	Option to activate the space type.
Available for	Option to specify the type of users for whom the space type is available.

4. Select **Submit**.

Result
The space type is configured. You can select this space type while creating a space or a type mapping.

Mapping employees to their designated workspaces

Map your employees to their designated workplace locations in Workplace Core to automatically fill in that detail in reservation requests and to take advantage of auto-assignment of workspaces if that feature has been enabled.

For employees who had a designated workspace before they started working remotely, create a mapping between the user profile and the designated workspace details. This mapping populates the workspace details on reservation request forms so employees don't have to provide these details manually.

If your system administrator has enabled the auto-assign feature, mapping workspaces for all employees also means that designated workspaces are automatically assigned when employees make a reservation request.

The data from the User Workplace Profile [sn_wsd_core_workplace_profile] table is used to automatically assign the designated workspace to the employee.

- If the user's designated space is available, this space is reserved for the employee.
- If the designated space is unavailable for the requested date or time, the application searches for and reserves an available space in the employee's workplace in the order of Area > Floor > Building > Campus > Site > Region.

  For example, if no spaces are available in the designated area of the employee, the application finds and reserves an available space from the floor of this area.

Map designated workspaces to user profiles

Map existing designated workspaces to employee user profiles in Workplace Core. This mapping is used to automatically allocate workspaces for employees so they don't have to select a workspace manually when requesting a reservation.

Before you begin

- Ensure that your workplace administrator has completed setting up your workplace data. For more information, see Providing your workplace data.
- Ensure that you have the designated workplace information for all the employees.
- You can also Navigate to the User Workplace Profiles [sn_wsd_core_workplace_profile] table by entering `sn_wsd_core_workplace_profile.list` in the navigation filter.

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task
Create a mapping for all employees and their designated workplaces. You can also perform an easy import of your employee workplace data. For more information, see Easy import.

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Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Administration** > **Workplace profiles**.
2. Select **New**.
3. On the form, fill in the fields.

User Workplace Profile form

Field	Description
Employee	Employee for whom you want to create a workplace mapping.
Workplace location	Designated workplace of the employee.
Active	Option for indicating that this workplace mapping is active.
Enable employee location privacy	Option to set location privacy preference for the workplace profile. Note the following: ○ Set this option only if you want to have a different privacy setup for the workplace profile. ○ By default, the location privacy preference that is set on the building to which the workplace profile is assigned is considered. ○ In case, the building doesn't have any location privacy preference, preference set in the Workplace Reservation Management system property *sn_wsd_core.ENABLE_LOCATION_PRIVACY* is considered. ○ The field is set to **None** by default. For more information about each field, refer to Location privacy settings and impact

4. Select **Submit**.
5. Repeat the procedure for all the employees of the workplace that you manage.

Result

The User Workplace Profiles [sn_wsd_core_workplace_profile] table is populated with all the new profiles.

Assign the workplace user role to employees

Set rules in Workplace Core to assign the workplace user role to employees in only the specific countries where you are starting a return to office operations.

Before you begin

Ensure that the user profiles of all your employees have required details. You can review the employee user profiles by navigating to **User Administration** > **Users**.

Role required: admin or sn_wsd_core.admin

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Procedure

1. Navigate to **Workplace Safety Management** > **Administration**.
2. Select **Client Role Assignment Rules**.
3. On the form, fill in the fields.

Workplace Client Role Rule form

Field	Description
Name	Unique name for this assignment rule.
Role	This value is auto-generated with the workplace user role (sn_wsd_core.workplace_user).
Active	Option for indicating whether this assignment rule is active.
Condition	Option to add filter conditions that a user profile must match. To add a condition, select **Add filter condition**. To add a OR clause, select **Add "OR" clause**.
Table	Table on which the conditions must be built. The field is automatically selected as `sys_user`.

4. Select **Submit**.

Result
The workplace user roles are assigned. If a record is created or updated on this table, a role assignment process is triggered in the background.

Configuring shifts for your workplace

Configure shifts for your organization in the Workplace Core application so you can efficiently plan and manage your workplace by assigning employees and workspaces to those schedules.

Define shifts for your workplace

Define shifts in Workplace Core with specific schedules so you can designate areas or workplace and assign employees for each shift.

Before you begin
- Providing your workplace data.
- Ensure you have the following information:
  - Appropriate shift schedules
  - Data of the employees who would operate from the office in this shift
  - Data of the workplaces to be made available for this shift

Role required: sn_wsd_core.workplace_manager

About this task
Workplace managers can later reserve workplaces for employees according to the shifts assigned to them.

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If your organization does not organize work in shifts, you can use the general shift schedule that is available with the application by default.

You can also access the Shift form by navigating to **Workplace Core** > **Shift Management** > **Create New**.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Browse Workplace Services**.
2. Select **Add a shift**.
3. On the form, fill in the fields.

Shift form

Field	Description
Name	Name of the shift, for example, Morning Shift.
Schedule	Schedule for the shift. For a general shift schedule, select **General shift**. For more information about how to create a shift schedule, see Define a schedule.
Owner	Shift owner who monitors activities during this shift.
State	Status of the shift. Choose one of the following values: ○ **Draft**: Indicates that the shift details are incomplete. ○ **Ready**: Indicates that the shift is ready for assignments. ○ **Cancelled**: Indicates that the shift is cancelled.
Start	Date from which this shift is active.
End	Date until which the shift is active.
Region	Region of the workplace site.
Site	Site location of the office campus.
Campus	Name of the campus in which the office building is present.
Building	Name of the building in which the office floor is located.
Floor	Name or number of the floor where the area is located.
Area	Area that is active for operation and use during this shift.
Users	Employees assigned to this shift.

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Field	Description
	This field appears only on Workplace Service Portal.
Locations	Workplaces available for reservation during this shift. This field appears only on Workplace Service Portal.

Note:

- If this shift is applicable to all office buildings on your campus, you can leave the **Building**, **Floor**, and **Area** fields empty. The shift and its schedule will be automatically applied to all the records of buildings, floors, and areas associated with this campus.
- When an employee requests to make a reservation with shifts, only shifts that are active on the dates that the employee selected are displayed on the reservation form.

4. Select **Submit**.
5. If you accessed the Shift form from Workplace Service Portal, on the verification page, you can define another shift or view all the existing shifts.

Option	Action
Define another shift	Select **Add another shift**.
View all existing shifts	Select **View all shifts**.

Result

The shift is added to the list of all shifts that you can view by navigating to **Workplace Safety Management** > **Shift Management** > **All**.

If you want to delete a shift, perform the following actions:

- Navigate to **Workplace Safety Management** > **Shift Management** > **All** and select the shift that you want to delete.
- On the form, click**Delete**.
- In the confirmation window, click **Delete**.

  The shift is deleted.

What to do next

If you created the shift using Workplace Service Portal, you can directly create workplace reservations.

You can configure other information such as employees, workplaces, and maintenance tasks associated with this shift later.

- Assign more employees to a shift.
- Associate more workplaces with a shift.
- Associate tasks with a shift.

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Assign employees to a shift

Associate employees with a shift in Workplace Core so that they operate from the office only in the shifts to which they are assigned. Workplace managers can later reserve workspaces for these employees according to their assigned shifts.

Before you begin

- Define shifts for your workplace.
- Ensure you have the data for the employees who will operate from the office in this shift.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Safety Management** > **Shift Management** > **All**.
2. Open a shift to which you want to add employees.
3. In the Users related list, select **Edit**.
4. Add all the employees who should operate from the office in this shift.
5. Select **Save**.

Result

A pre-configured email with the shift details is sent to all employees assigned to this shift.

What to do next

Associate areas and spaces with a shift.

Associate areas and spaces with a shift

Associate work areas and spaces with a shift in Workplace Core so that they are available only for that shift. Workplace managers can later reserve these workplace for employees operating in that shift.

Before you begin

- Define shifts for your workplace.
- Ensure you have the data for the workplaces to be made available for this shift.
- Ensure that the glide.ui.list.allow_extended_fields system property is set to **true** so that the filter criteria is displayed appropriately when you're adding areas or spaces.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Safety Management** > **Shift Management** > **All**.
2. Open a shift to which you want to add employees.
3. In the Locations related list, select **Edit**.
4. Add all the areas and spaces to be made available for this shift.
5. Select **Save**.

What to do next

Create workplace reservations for an employee.

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Managing workplace shifts that you own

Review the workplace shifts that you own in Workplace Core and update the shift details if necessary. You can also monitor the reservations and requests made for the workspaces associated with these shifts.

Update details of the shifts that you own

Review and modify the details of the workplace shifts that you own in Workplace Core. You can modify the general shift details, and add or remove employees or workplaces associated with the shift.

Before you begin

Role required: sn_wsd_core.workplace_shift_owner

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Shift Management**.
2. Select **Owned by Me**.
3. Open the shift for which you want to view the details.
4. **Optional:** Modify the shift details.

   a. Edit the details on the shift form.

Shift form

Field	Description
Name	Name of the shift.
Schedule	Schedule for the shift. (Optional) For a general shift schedule, select **General shift**.
Owner	Shift owner who monitors activities during this shift. (Optional) If you select a different user, you will lose access to this shift.
State	Status of the shift. Choose one of the following values: ▪ **Draft**: Indicates that the shift details are incomplete. ▪ **Ready**: Indicates that the shift is ready for assignments. ▪ **Cancelled**: Indicates that the shift is cancelled.
Region	Region of the workplace site.
Site	Site location of the office campus.
Campus	Name of the campus in which the office building is present.

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Field	Description
Building	Name of the building in which the office floor is located.
Floor	Name or number of the floor where the area is located.
Area	Area that is active for operation and use during this shift.

Note: If this shift is applicable to all office buildings on your campus, you can leave the **Building**, **Floor**, and **Area** fields empty. The shift and its schedule will be automatically applied to all the records of buildings, floors, and areas associated with this campus.

b. Select **Update**.

5. **Optional:** Modify the list of employees assigned to this shift.
   a. In the Users related list, select **Edit**.
   b. Add or remove users.
6. **Optional:** Modify the list of workspaces associated with this shift.
   a. In the Locations related list, select **Edit**.
   b. Add or remove areas and spaces.

Review workplace reservations for shifts that you own

Review the workplace reservations and the reservation requests made for the shifts that you own in Workplace Core. You can identify pending requests and work with your workplace manager to resolve them.

Before you begin

Role required: sn_wsd_core.workplace_shift_owner

Procedure

1. Navigate to the reservation requests from employees or workplace reservations by the workplace manager.

Choice	Navigation
Reservation requests made by employees	Navigate to **Workplace Safety Management** > **Workplace Requests** > **All**
Reservations made by the workplace manager	Navigate to **Workplace Safety Management** > **Space Reservations** > **All Reservations**

2. Review all reservations requested or made for your shift.
3. **Optional:** Open a reservation record to view its details.

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(Optional) If you want to make any changes to the reservation such as assigning another workspace to the employee, or changing the date of the reservation, reach out to the workplace manager to request those changes.

4. **Optional:** If you are viewing employee requests, note any requests in the **Pending** state so you can work with your workplace manager to resolve them.

Managing workplace reservations for employees

Reserve available areas or spaces for your employees and review pending reservation requests from employees in Workplace Core so you can ensure physical distancing measures when they return to the workplace. Once you make reservations, employees are notified about the locations to which they have access. The Workplace Service Delivery also offers more advanced workplace reservation options in the Workplace Reservation Management application.

Creating workplace reservations for employees

Reserving workplace areas

As a workplace manager, you can make reservations for employees for areas on the floors of your office buildings. When employees return to the office, they can work from any of the spaces from the reserved area. The number of employee reservations that you can make for an area of your workplace depend on the capacity defined for that area. If the **Capacity** field of an area is set to **0** or left empty, reservations cannot be made for that area.

Creating a single space reservation

Using the shifts that you defined, you can create a space reservation for an employee for a single day or multiple days.

Creating space reservations in bulk

You can generate in one action reservations for multiple employees who are assigned to a shift for a specific date range. For example, you can use this feature to create reservations for employees of a specific department who would all be assigned to the same shift.

Child reservation records for employee space reservations

When you reserve a workplace for an employee, the reservation generates child reservation records for every applicable working day of the specified period. The applicable days are determined by the shift schedule that you select for this reservation. The reservation that you initially created acts as the parent reservation record.

If a child reservation conflicts with an existing reservation for any day in the specified period, the child reservation is not created for that day. You can manually create a reservation for a different workplace for that day.

For example, say you created a reservation for the workplace 2CN1612 for Mark Andrews in the afternoon shift from 06-01-2020 to 06-10-2020. Eight child reservation records for Mark Andrews for the workplace 2CN1612 would be created for each working day between 06-01-2020 and 06-10-2020. However, if a reservation for 2CN1612 on 06-08-2020 exists for another employee Jane Doe, the child reservation for Mark Andrews on 06-08-2020 is not created. You can manually create a reservation for Mark Andrews for a different workplace for 06-08-2020.

If you update the details of a parent reservation later, all its child reservations except the ones with dates in the past are updated accordingly.

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Working with space reservation requests from employees

After an employee requests a workplace for a given date range and the manager approves the request, the application checks the availability of the requested space. If the workplace is unavailable for any or all days of the specified period, the request moves to the Pending state. As a workplace manager, you can review these pending reservation requests and allocate a different workplace to the employee to complete the request.

Define the capacity of workplace areas

Set the capacity for areas of your workplace in Workplace Core to enable reservations for the area. The capacity ensures a limit to the workplace reservations for these areas so you can ensure safety guidelines.

Before you begin

- Add your workplace data.
- Ensure you have the details of the maximum capacity for the areas of your workplace.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Space Administration** > **Areas**.
2. Open an area to which you want to add the capacity.
3. On the Area form, enter a value for the **Capacity** field.
   For example, if this area can accommodate only 8 people safely according to physical distancing guidelines, set the value to 8.
4. Select **Update**.

Create workplace reservations for an employee

Create workplace reservations for an employee in the Workplace Core application using the shifts and shift schedules that you defined.

Before you begin

- Define shifts for your workplace.
- Assign employees to a shift.
- Associate areas and spaces with a shift.
- Define the capacity of workplace areas.
- Ensure you have the data that shows the mapping of employees to the workplaces in your workplace.

Role required: sn_wsd_core.workplace_manager

About this task

Reserve a workplace for an employee according to the assigned shift for a single day or multiple days.

You can also access the Reservation form by navigating to **Workplace Core** > **Space Reservations** > **Create New**.

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Browse Workplace Services**.
2. Scroll and select **Reserve a space**.
3. On the form, fill in the fields.

Reservation form

Field	Description
Shift	Shift for which this reservation is being made.
Location	Area or space for which this reservation is being made.
Requested for	Employee for whom this reservation is being made.
Start date	Date and time from which the reservation is active.
End date	Date and time until which the reservation remains active.

4. Select **Submit**.
5. If you accessed the Reservation form from Workplace Service Portal, on the verification page, you can create another reservation or view all the existing reservations.

Option	Action
Create another workplace reservation	Select **Reserve another space**.
View existing workplace reservations	Select **View all reservations**.

Result

- If you've reserved a space, then child reservation records are generated for every applicable occurrence of the specified period.
- A preconfigured email with the reservation details is sent to the shift owner and the employee for whom you reserved the workplace.
- The reservation is added to the list of all reservations that you can view by navigating to **Workplace Core** > **Space Reservations** > **All Reservations**.

Create workplace reservations for multiple employees

Automatically generate workplace reservations in bulk for all employees assigned to a shift for a single day or multiple days.

Before you begin

- Define shifts for your workplace.
- Assign employees to a shift.
- Associate areas and spaces with a shift.
- Ensure that the number of locations associated with the shift is greater than the number of employees assigned to the shift.

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Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Safety Management** > **Shift Management** > **All**.
2. Open a shift for which you want to generate the bulk reservations.
3. Select **Generate Bulk Reservation**.
4. Select a date range from the **Start date** and **End date** fields.
   If you want to create the bulk reservation for a single day, you can set the start and end date to the same day. Otherwise, set a date range.
5. Select **OK**.

Result

Reservations for the employees in this shift are created for the locations associated with the shift for the provided dates. You can view these reservations by navigating to **Workplace Safety Management** > **Space Reservations** > **All Reservations**.

Review pending workplace reservation requests

Review pending workplace reservation requests from employees in Workplace Core and assign available workplaces to complete these requests.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Workplace Requests** > **Pending**.
2. Open a pending request that you want to address.
3. Open the related reservation record, which is the parent reservation:
   a. Select the information () icon next to the **Reservation** field.
   b. Select **Open Record** for the desired request.
4. On the reservation form, review the reservation details such as the workplace location being requested, the start and end dates, and the number of reservations confirmed for that period. From these details, you can review the number of days, with their dates, that are missing a reservation for the employee for the requested location.
5. If any dates are missing a reservation for the requested location, adjust the pending request to assign a workplace for all the missing desired dates.
   - Change the workplace location in the parent reservation to a workplace available for all dates, which will also update the location for all applicable future child reservations.
     a. Select a different location from the **Workplace location** field.
     b. Select **Update**.
   - Create a child reservation for a new workplace location for this employee for specific dates that are missing a reservation.
     a. In the Reservations related list, select **New**.
     b. Select the start and end dates in the **Start** and **End** fields.
     c. Select a location from the **Workplace location** field.

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The list of spaces displays the locations that are available for the requested dates.

d. Select **Submit**.

6. After all the days that were missing a reservation are addressed, update the status of the pending workplace task to **Closed complete**.
7. **Optional:** Repeat this process for all pending workplace requests that you want to address.

Result

Once the status of workplace request is updated to **Closed complete**, the reservation information is populated in the **Notes** field of the workplace request.

Setting and tracking arrivals at the workplace

Workplace managers can set arrival intervals in Workplace Core for different locations at your workplace with defined capacities to facilitate staggered entry of employees into the office. Employees can then choose from the defined arrival slots.

Workplace managers can define arrival times and capacity for different locations such as the entry and exit gates, elevator, gym, and cafeteria of your workplace. Employees can then schedule their arrival at these locations for an available time slot.

For example, say you define arrival times for the cafeteria at 12:00 h, 13:00 h, 14:00 h, and 15:00 h, and set a capacity of 15 for every slot. A maximum of 15 employees can schedule their arrival to the cafeteria for each of these times on any given day.

By setting arrival intervals for your workplace, you can facilitate employee actions such as entry and exit to the office, elevator use, lunch pickup, gym use, and so on, without employees having to wait in long lines or causing large gatherings at any of the locations.

Important: Starting with Workplace Core version 2.3, time zones are introduced in the application. All the arrival schedules that were created on Workplace Core version 2.2 and earlier are deactivated after the upgrade.

Define arrival schedules at the workplace for employees

Define arrival slot times in Workplace Core for different locations at your workplace and indicate the capacity for each slot. Establishing arrival schedules enables safe staggered entry of employees to these locations.

Before you begin

- Add your workplace data.
- Ensure you have the data for arrival schedules of the locations of your workplace.
- Ensure that your time zone is set to the time zone of the building that is used for the arrival.

Important: Starting with Workplace Core version 2.3, time zones are introduced in the application. All the arrival schedules that were created on Workplace Core version 2.2 and earlier are deactivated after the upgrade. Both existing customers and new customers must perform the following actions on existing arrival schedules to set them to active:

1. Set the time zone of the building where you are creating or updating the arrival schedule.

   Note: If you are creating or updating the arrival schedule for a floor, area or a space, then select the building where it is located.

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a. Go to **Workplace Safety Management** > **Space Administration**.

b. Select **Buildings**, **Floors**, **Areas**, or **Spaces** based on where you are scheduling an arrival slot.

c. Select the building, floor, area, or the space for which you want to set the time zone.

d. Set the building time zone.

- If you selected a building, set the time zone in the **Time zone** field.
- If you selected a floor, area, or the space, on the form, select the preview icon ( ) that is next to the **Building** field.
  - In dialog box, select **Open record**.
  - On the Buildings form, set the time zone in the **Time zone** field.

e. Select **Update**.

Note: All the active arrival schedules that were created on this building and on associated floors, areas, or spaces will be deactivated. Any future arrival requests that are related to this schedule will be canceled.

f. Select **Ok** on the warning that appears.

2. Change your session's time zone to the building's time zone.

Note: Ensure that the sn_wsd_core.workplace_manager role is included in the **glide.timezone_changer.roles** property. If it is not included, ask your system administrator to include the role so that you can change your time zone.

a. Select the settings icon ( ) on your instance header.

b. Set the **Time zone** field to the time zone of the building where you are creating or updating the arrival schedule.

Role required: sn_wsd_core.workplace_manager

About this task

Procedure

1. Navigate to **Workplace Safety Management** > **Workplace Arrival Scheduling**.
2. Select **Create Arrival Schedules**.
3. On the form, fill in the fields.

Arrival Schedule form

Field	Description
Workplace location	Select a building, floor, area or space where you want to schedule the arrival times.
Arrival schedule time	Time (in hours, minutes, and seconds) at which employee arrivals can start at this location, for example, 12 30 00.

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Field	Description
Active	Option for indicating whether this schedule time is active. If marked as active, this schedule time will appear every day in the list of available time slots.
Capacity	Maximum number of employees that can schedule their arrival to this location at this slot time.

4. Select **Submit**.

Result

An arrival schedule is created for this workplace location for the indicated time and capacity. You can view arrival schedules by navigating to **Workplace Safety Management** > **Workplace Arrival Scheduling** > **Arrival Schedules**.

Schedule your arrival time at a workplace location

Schedule your arrival in Workplace Core at locations at your workplace so you can prevent long lines and safely enter the location.

Before you begin

To schedule an arrival using your mobile device, you must have the Now® Mobile app.

Role required: sn_wsd_core.workplace_user

Note:

In Workplace Core[var.workplace-safety-management] [sn_wsd_core] version 2.19.0 and above, the navigation path for Workplace Services Portal is not available in the application search context menu **All** > **Workplace Core**. The Workplace Services Portal is currently being deprecated. You can access the Workplace Services Portal capabilities from the Employee Center portal home page **All** > **Self-Service** > **Employee Center** > **Workplace Services**. For more information, Workplace services on the Employee Center portal[workplace-services-on-employee-center].

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Browse Workplace Services**.
2. Scroll and select **Schedule your arrival**.
3. On the form, fill in the fields.

Schedule your arrival form

Field	Description
Entry point	Location where you want to schedule your arrival.
Building time zone	Time zone for the building of the selected entry point.
Date	Date of your arrival.

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Field	Description
Arrival time	Time of your arrival. The time is displayed in 24-hour format.

4. Select **Submit**.

Result
The arrival request is created. The web page or your mobile screen is refreshed to show your arrival request details.

What to do next
You can check the details of your arrival schedule anytime.

1. Depending on your platform, do one of the following to view your requests:
   - On the Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
   - On the Now Mobile navigation bar, tap **For Me** and scroll down to the My Request section to view your requests.
2. If you want to cancel your arrival, select the arrival request and select **Cancel arrival**.

Updating arrival schedules at the workplace

Define building time zones, change the capacity of an arrival schedule, and set the schedule to active or inactive.

Before you begin
- Add your workplace data.
- Ensure that you have the data for the arrival schedules of your workplace locations.

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- Ensure that your time zone is set to the time zone of the building that is used for the arrival.

Important: Starting with Workplace Core version 2.3, time zones are introduced in the application. All the arrival schedules that were created on Workplace Core version 2.2 and earlier are deactivated after the upgrade. Both existing customers and new customers must perform the following actions on existing arrival schedules to set them to active:

1. Set the time zone of the building where you are creating or updating the arrival schedule.

   Note: If you are creating or updating the arrival schedule for a floor, area or a space, then select the building where it is located.

   a. If you are updating the arrival schedule, do the following:

      i. Select the workplace location info icon ( ) that is next to the **Workplace location** field.

      ii. In the dialog box, select **Open record**.

      iii. If the value of **Workplace location** is a floor, area or a space, then select the workplace location info icon ( ) that is next to the **Building** field.

   b. On the Buildings form, set the time zone in the **Time zone** field.

   c. Select **Update**.

      Note: All the active arrival schedules that were created on this building and on associated floors, areas, or spaces will be deactivated. Any future arrival requests that are related to this schedule will be canceled.

   d. Select **Ok** on the warning that appears.

2. Change your session's time zone to the building's time zone.

   Note: Ensure that the sn_wsd_core.workplace_manager role is included in the **glide.timezone_changer.roles** property. If it is not included, ask your system administrator to include the role so that you can change your time zone.

   a. Select the settings icon ( ) on your instance header.

   b. Set the **Time zone** field to the time zone of the building where you are creating or updating the arrival schedule.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Workplace Arrival Scheduling**.
2. Select **Arrival Schedules**.
3. Select the arrival schedule that you want to update.

   Note: You cannot update the **Workplace location** or **Arrival schedule time** fields of an arrival schedule if there are any arrival requests associated with it. You must create a new arrival schedule for the changed **Workplace location** or **Arrival schedule time** fields.

4. To activate the schedule, select the **Active** option.

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5. To change the capacity, edit the **Capacity** field.
6. Select **Update**.

Result
The arrival schedule is updated.

Making workplace reservations

Make workplace reservations in Workplace Core when you are ready to return to the office. You can reserve a workplace for a day or less directly or request a workplace for a specified period. Once a reservation request is approved and confirmed, you are notified about the reservation details.

Reserving a workplace

As an employee, you can request a workplace reservation using Employee Center.

When making a reservation, you can choose an available space that you want to access or select an available area. If you have made a reservation for an area, you can work from any available space within that area when you return to the office.

You can select a shift of your choice from the shift schedules defined by your organization. If your organization doesn't use shifts, you can select a custom time period. Depending on your organizational guidelines, your reservation request might require an approval.

Note: If you need a workplace for only a day or less, you can reserve it directly and don't have to submit a request and get approval.

Space reservation request states

After you submit a space reservation request, the status changes based on the action taken on it by your approving manager or the workplace manager.

- If your manager hasn't acted on your request, the state of the request remains Awaiting approval.
- If your manager approves your request and the space availability is confirmed, the state of the request changes to Closed complete.
- If your manager rejects your request, the state of the request changes to Closed incomplete.
- If your manager approves your request but the space you requested for isn't available for all or some days, the state of the request changes to Pending.

  You can follow up with your workplace manager to get a new space assigned and resolve your pending space request.

- If you cancel your request, the state of the request changes to canceled.

Email and push notifications

If you submit a space reservation request from the catalog item, or if a request is submitted on your behalf, you will receive an email notification about the request. If you have the Now® Mobile app, you will receive push notifications about your reservation requests.

The notification contains campus details, space details, and the reservation duration.

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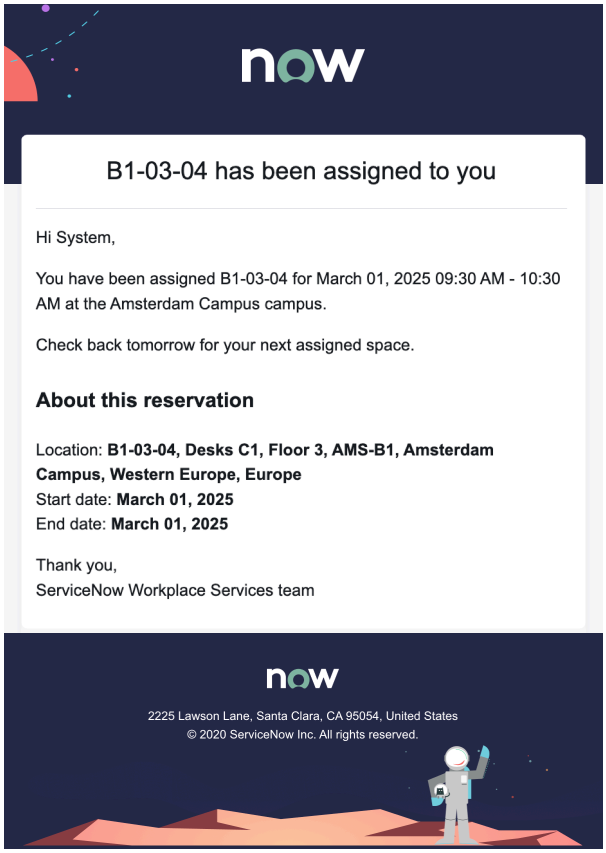

Request a workplace reservation for multiple days

Request a workplace reservation for the days during which you want to return to office by using Workplace Core.

Before you begin

.

Role required: sn_wsd_core.workplace_user

About this task

Request a workplace reservation either in a defined shift schedule or for a custom time for a specific date range during which you want to work from the office.

You can also access the reservation form using your mobile device. From the Now Mobile app, navigate to **Workplace core** and choose either **Request a short-term shift and space** or **Request a short-term space**.

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center** > **Browse Workplace Services**.
2. Reserve a space for a predefined shift or for a custom time.
   - To reserve a space for a defined shift schedule, select **Request a short-term shift and space**.
   - To reserve a space for a custom time, select **Request a short-term space**.
3. On the form, fill in the fields.

> **Note:** The visibility of some of the following fields depends on the application settings made by your administrator.

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Reserve a short-term space form

Field	Description
Region	Region of your office location.
Site	Location of your office.
Campus	Campus of your office building.
Building	Office building that you want to return to.
Start date	Date from which you want access to the workplace.
End date	Date until which you want to access the workplace.
Shift	The shift schedule during which you want to visit the office. Only the shifts available for the selected location and date range are displayed. Only the shifts that you are part of are displayed. This is dependent on the system properties which were configured by your organization.
Shift detail	Details of the shift that you selected. The shift detail is auto-filled based on your shift selection.
Start time for each day	Time from when you would access the workplace. This field is visible if you selected **Request a short-term space**.
End time for each day	Time until when you would access the workplace. This field is visible if you selected **Request a short-term space**.
Floor	Floor of the area or space that you want to access.

4. Select **Submit**.

Result

The state of your request is set to Awaiting approval, which indicates that the request has been sent to your manager for approval.

Reserve a workplace for a day

Reserve workplaces for a day on which you want to return to the office by using Workplace Core.

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Before you begin
Role required: sn_wsd_core.workplace_user

About this task
Reserve spaces for a period less than or equal to 24 hours on the day that you want to work from the office, either in a defined shift schedule or in your custom timings.

You can also access the reservation form from the Now Mobile app. Navigate to **Workplace Core** and choose one from **Reserve a shift and space for a day** or **Reserve a space for a day**.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace services** > **Browse Workplace Services**.

   Note: You can also raise a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service.

2. Reserve a space either for a defined day shift or a custom date.
   - To reserve a space for a defined shift schedule, select **Reserve a shift and space for a day**.
   - To reserve a space for custom timings, select **Reserve a space for a day**.
3. On the Reserve a space form, fill in the fields.

   For a description of the field values, see Reserve a space form.

   Note: The visibility of some of the following fields depends on the application settings made by your administrator.

4. If the **Area** and **Space** fields are available, select an area or a space that you want to reserve.
5. Select **Submit**.

Result
The web page is refreshed to show your reservation details.

What to do next
You will receive an email notification 15 minutes before the reservation to check in and another email notification 30 minutes before the reservation end time to check out.

- In the check-in email, select any of the following actions.
  - **Check in**: Check in your reservation.
  - **Cancel this reservation**: Cancel if the reservation is no longer required.
  - (Optional) **Check out**: Check out early before the reservation end time.

  Note: You must check in within 30 minutes from the reservation start time, otherwise the reservation is canceled.

- In the check-out email received before the reservation end time, select **Check out** to check out the reservation.

  Note: You must check out within an hour after the reservation end time. Otherwise, the reservation is automatically checked out.

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Approve employee workplace reservation requests

Review employee area and space reservation requests in Workplace Core and approve or reject them.

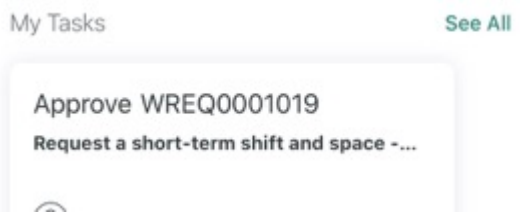
Before you begin

To approve or reject a workplace request using your mobile device, you must have the Now® Mobile app.

Role required: approver_user

Procedure

1. Navigate to a reservation approval task.

Application	Action
Now Mobile	In the Now Mobile app, open a task from the My Tasks section. 

2. **Optional:** Review the details of the request.
3. Approve or reject the request by selecting **Approve** or **Reject**.

Managing workplace tasks

Using workplace tasks in Workplace Core, workplace managers can monitor workplace activities that are created and scheduled in the workplace for each shift. They can also schedule planned or on-demand maintenance tasks and generate reports to track the progress of these activities.

Workplace task creation

You can create workplace tasks in the Workplace Core application for various situations.

Automatically created pre-cleaning and post-cleaning tasks

Workplace managers can create shifts and associate employees and spaces to the shift. After workspaces are assigned to a shift and the shift's state is set to Ready, the system automatically creates pre-cleaning and post-cleaning tasks for that shift. These tasks are generated using the respective templates available with the application.

Note: If a shift doesn't have a space associated to it, pre-cleaning and post-cleaning tasks are not auto-generated for it.

Planned tasks

Tasks for recurring planned activities that are independent of shifts.

Ad hoc tasks

Ad hoc tasks when on-demand cleaning is required.

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Task assignment

Assignments for tasks depend on the task type:

- Pre-cleaning and post-cleaning tasks are automatically assigned based on their templates.
- Planned tasks are automatically assigned based on the planned task definition that is used to generate these tasks.
- Ad hoc tasks can be assigned manually by workplace managers when they create these tasks.

Signature of completion

For audit and compliance of workplace activities, workplace managers can electronically sign the completed workplace tasks. This action generates a PDF of the signed form and attaches it to the task.

Configure a workplace task template

Configure templates in Workplace Core that can be used to create workplace tasks. You can either modify predefined workplace task templates or create your own templates and associate them with workplace tasks.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task

Templates simplify the process of creating tasks in Workplace Core by populating fields automatically. The following predefined templates are available with the application:

- Pre-cleaning
- Post-cleaning

Procedure

1. Navigate to **All** > *Workplace Core* > **Workplace Tasks** > **Workplace Task Templates**.
2. Create a new template or modify an existing template.
   - If you are creating a new template, select **New**.
   - If you are modifying an existing template, open the desired template.

   For information about the template form fields, see Create a template.
3. Select the **Workplace Task [sn_wsd_core_workplace_task]** table in the **Table** field.
4. **Optional:** Apply the template to the required workplace task type.
   a. In the **Template** section, select the **Workplace task type** field in the left column.
   b. Select the required task type in the right column.
5. Select **Submit**.
6. Add a checklist to the template.
   For steps on how to add a checklist, see Create a workplace task checklist.
7. Select **Update**.

Create a workplace task checklist

You can create a unique checklist for each workplace task template in Workplace Core. You can also quickly create a checklist from an existing checklist template.

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Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task
Ensure that you have the following:

- A workplace task template already created in the application, if you are adding a checklist for a workplace task template.
- A workplace task already created in the application, if you are adding a checklist for a workplace task.

You can also create checklists for individual workplace task records.

Procedure
1. Create a checklist to be included in all tasks using the same template or add a checklist to a specific task.

Option	Steps
Checklist for workplace task template	**a.** Navigate to **Workplace Safety Management** > **Workplace Tasks** > **Workplace Task Templates**. **b.** In the list, select to open the template to which you want to add the checklist.
Checklist in a specific workplace task	**a.** Navigate to **Workplace Safety Management** > **Workplace Tasks**. **b.** In the list, select the task to which you want to add the checklist.

2. In the **Checklist** section, select the down arrow ( ) beside the **Checklist** formatter.
3. Add a checklist.
   - If you are creating a new checklist, select **Create new**.
   - If you are using an existing checklist template, select **Create from template** and select a template.
4. Add a checklist item.
   a. Select the Add item icon ( ) and enter text for the checklist item.
   b. Press Enter to add the checklist item.
   Add as many additional checklist items as desired.
5. **Optional:** Delete unwanted checklist items by selecting the delete item icon ( ).
6. **Optional:** Change the order of checklist items by selecting the drag icon ( ) and dragging the item to a different position in the list.
7. Select **Update**.

Result
- If you created the checklist for a workplace task template, any task created using this workplace template will also contain this checklist.
- If you created the checklist in a workplace task form, the checklist will be part of only that task.

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What to do next
You can save the checklist as a template for easy reuse, if required.

Save a workplace task checklist as a template

You can save a Workplace Core workplace task checklist as a template for easy reuse. A template saves time by adding checklist items automatically in a record where you use it.

Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task
When you add a template checklist to a record, you can add, edit, or remove checklist items in the record without affecting the template.

Procedure

1. Navigate to the record that contains a checklist you created.
   To find out how to access the record, see Create a workplace task checklist.
2. In the **Checklist** section, select the down arrow ( ) beside the **Checklist** formatter.
3. Select **Save as Template**.
4. Enter a name for the checklist template.
5. From the **User Group** list, select a group to limit who can use the checklist template.

   Only members of the selected group and the user who created the checklist can use the checklist as a template. Leaving this field blank prevents anyone but the template creator from using the checklist template.
6. Select **Save**.

Configure an HTML template

Configure a signing template that you want to make available for signing the completed Workplace Core workplace tasks. You can configure the default signing template available with the application or create a new template.

Before you begin
Role required: sn_wsd_core.admin

About this task
When a workplace manager signs a completed task, an e-signature PDF document is generated using a signing template and is attached to the task. For information about signing a workplace task, see Sign a completed workplace task.

Procedure

1. Navigate to **All** > *Workplace Core* > **Administration** > **HTML templates**.
2. Select **New** or open an existing signing template to edit it.
   The application provides a default template called **Task Signing Template**.
3. On the form, fill in or modify the fields.

Html Template form

Field	Description
Acknowledgment text	Text clarifying the meaning of the signature.

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Field	Description
	For example, "I acknowledge that this information is true".
Name	Name of the signing template.
Table	Table associated with the template. The selected table determines the available variables in the **Select variables** field.
Body	Placeholder for HTML text and variables. The variables are resolved when the PDF is generated. You can select fields from the **Select variables** option to add them as variables to the HTML body.

4. Customize the body of the signing template in the **Body** field.

   a. Enter and format the text to design the body of the template.

      Use the formatting tools to apply formatting options, such as bold, italic, underline, or font styling.

   b. Insert variables by locating your cursor at the desired location and selecting the variable under **Fields**.

      For example, to indicate which location to clean, you might insert the text `Cleaning finished for the Workplace location:` and, after a space, select **Workplace location** under **Select variables**. The variable in the **Body** field text would appear as follows:

      ```
      Cleaning finished for the Workplace location:
       ${workplace_location}
      ```

      The variable is replaced with the actual location when the PDF is generated.

5. At the desired location in the **Body** field, enter the following variables:
   - `${Checklist}`: Adds the checklist variable.
   - `${Signature}`: Adds the signature variable.

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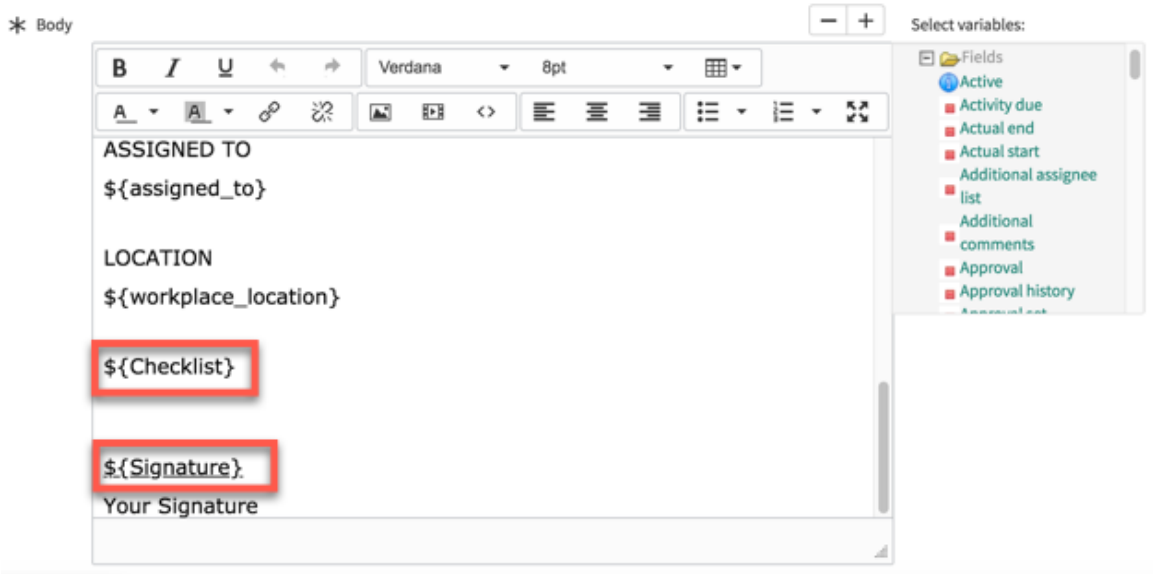

In the signed PDF document, the signature and checklist are embedded at the same location where you entered these variables into the template body.

6. Select **Submit**.
7. **Optional:** Review the look of the PDF document by impersonating a workplace manager and signing a closed task.

Create planned task definitions

Create planned task definitions in Workplace Core to help workplace managers easily generate tasks that are often repeated and independent of shifts such as cleaning coffee vending machines or cleaning floors. You can quickly specify the task details and the frequency at which the task is to be performed.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace services** > **Browse Workplace Services**.
2. Select **Add planned task definition**.
3. On the form, fill in the fields.

Planned task definition form

Field	Description
Name	Name of the planned task definition. For example, "Clean conference rooms" for the activity of sanitizing conference rooms.
Schedule	Work schedule to be used for planned tasks.
Workplace task template	Template used for the generated planned tasks.

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Field	Description
	Selecting a template automatically populates certain fields such as **Assigned to**, **Short description**, and **Workplace task type** in the generated tasks. For information about workplace task templates, see Configure a workplace task template.
Processing Time (hours)	Amount of time it should take to complete a planned task.
Planned end time	Date and time by which the task should be finished.
Planned start time	Date and time when the task should start.

4. Select **Submit**.
5. If you accessed the form from Workplace Service Portal, on the verification page, you can create another planned task definition or generate planned tasks from this definition immediately.

   Note: You can also use this definition to generate planned tasks later. See the instructions in the Generate planned tasks topic.

Option	Action
Create another planned task definition	Select **Add another task definition**.
Generate planned tasks immediately	**a.** Select **View all task definitions**. **b.** Open the planned task definition and select **Generate Task**. **c.** Select the **Workplace Tasks** related list to view the generated planned tasks.

Result

- The planned task definition is added to the list of all planned task definitions that you can view by navigating to **Workplace Core** > **Workplace Tasks** > **Planned Tasks Definitions**.
- If you created planned tasks from this definition, they are added to the list of all planned tasks. You can view those tasks by navigating to **Workplace Safety Management** > **Workplace Tasks** > **Planned Tasks**.

Generate planned workplace tasks

Using planned task definitions in Workplace Core to create planned tasks independent of shifts for recurring activities. For example, you can generate tasks for a selected number of days for cleaning all floors and buildings at midnight every day.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

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About this task

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace Tasks** > **Planned Tasks Definitions**.
2. In the list, open the planned task definition.
   You can also generate planned tasks immediately when you create a new planned task definition.
3. Select **Planned start time** and **Planned end time** values based on the days and time when you need these tasks to be performed.
4. Select **Generate Task**.

Result

- Based on the planned start time and planned end time, planned tasks are created for all occurrences of the schedule and appear in the **Workplace Tasks** related list.
- The **Expected start time** in each generated planned task is auto-calculated from the planned end time and processing time values in the respective tasks as follows:

```
Planned start time = Planned end time – Processing Time
```

You can view all planned tasks by navigating to **Workplace Core** > **Workplace Tasks** > **Planned Tasks**.

Create an ad hoc workplace task

Create an ad hoc task in Workplace Core for unplanned activities. For example, if you notice that something isn't clean in an area or want the area to be cleaned again, you can create an ad hoc workplace task to get the cleaning done immediately.

Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task
You can also access the workplace task form by navigating to **Workplace Core** > **Workplace Tasks** > **Create New**.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace services** > **Browse Workplace Services**.
2. Select **Add a task**.
3. On the form, fill in the fields.

Workplace Task form

Field		Description
Workplace task type		Type of the workplace task. Select **Ad-hoc Task**.
Workplace location		Workplace location where the task should be performed.
Signature template		Task signature template to use for signing off on this task when it is completed.

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Field		Description
		For more information, see Sign a completed workplace task.
State		State of the task.
Assignment group		User group assigned to the task.
Assigned to		User assigned to the task.
Vendor		Vendor whose employees should perform the task.
Short description		Brief description of the ad hoc task.

4. Select **Submit**.
5. If you accessed the form from Workplace Service Portal, on the verification page, you can create another task or view this task record in a list.

Option	Action
Create another task	Select **Add another task**.
View the task record in a list	Select **View all tasks**.

6. Add a checklist to the task to track the actions required to complete it.
   To add the checklist, open the task by navigating to **Workplace Core** > **Workplace Tasks** > **All**.
   For more information, see Create a workplace task checklist.

Result
The ad hoc task is added to the list of all tasks that you can view by navigating to **Workplace Core** > **Workplace Tasks** > **All**.

Sign a completed workplace task

As the workplace manager for a space, sign the workplace tasks Workplace Core for complete and closed activities. Signing a task generates a PDF document for the workplace activity, which is useful for compliance procedures.

Before you begin
Role required: sn_wsd_core.workplace_manager

Procedure
1. Navigate to **All** > **Workplace Safety Management** > **Workplace Tasks** > **Closed**.
2. In the list, select to open the workplace task that you want to sign.
3. In the **Sign template** field, review the signing template selected for the task.
   For more information, see Configure a workplace task signing template.
4. Select **Sign Task**.

> **Note:** The **Sign Task** button appears only once you have selected a template in the **Sign template** field.

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5. In the **Sign Task** form, sign the form in one of the following ways:
   - In the **Type signature** tab, enter your name in the **Full name** field.
   - In the **Draw signature** tab, draw your signature using your mouse.
6. Select **Accept and complete**.

Result
A PDF document of the signed form is generated based on the signing template associated with the task and is attached to the task.

Workplace knowledge management

As a workplace admin, you can create knowledge base articles for employees. In the articles, provide information to your employees about workplace services, such as workplace updates, self-help, troubleshoot, and others.

With the Workplace Service Delivery application, you can create knowledge base articles and display them as wiki pages or HTML pages. The Workplace Service Delivery Knowledge Management is the same as the ServiceNow AI Platform Knowledge Management, for more information, see Configuring Knowledge Management.

You can perform the following actions on a knowledge base article:

- Publish the article to make it available to employees.
- Update the article at any time if necessary.
- Retire the article if it is no longer required.
- Republish a retired article if necessary.
- Delete an article.

A knowledge base article undergoes the following workflow when it is created:

- Draft
- Review
- Published
- Pending retirement
- Retired

You can add attachments and enable employees to view the attachments individually. If a knowledge base article is relevant only for a short duration, you can specify an end date for the knowledge base article.

You can view and update the knowledge base articles at any time. You can view published articles, unpublished articles and retired articles separately. You can also republish an article whenever needed.

Create a workplace knowledge base article

Provide information to employees through knowledge base articles. Create knowledge base articles with information about workplace updates, self-help, troubleshoot steps, and others.

Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

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About this task

Create a knowledge base article to notify or provide employees with any important information that they must know. After you create a knowledge base article, publish the article to make it available to the employees.

You can perform the following actions on a knowledge base article:

- Publish the article to make it available to employees.
- Update the article at any time if necessary.
- Retire the article if it is no longer required.
- Republish a retired article if necessary.
- Delete an article.

A knowledge base article undergoes the following workflow when it is created:

- Draft
- Review
- Published
- Pending retirement
- Retired

Procedure

1. Navigate to **All** > **Workplace Core** > **Knowledge management** > **Create new article**.
2. Select **New**.
3. On the form, fill in the fields.

Knowledge form

Field	Description
Knowledge base	Name of the knowledge base. Select the **Workplace services** knowledge base.
Category	Relevant category for the knowledge base article. Select an existing category, or select the add category icon (⊕) to add a new category. You can also select or add a subcategory.
Valid to	Date until which the knowledge base article is valid. The date is automatically set to 2100 - 01 - 01.
Article type	Type of article, which you want to create. Choices are as follows: ○ Select **Wiki** to create a wiki page. ○ Select **HTML** to create an html web page.
Workflow	This field is automatically set as **Draft**. Depending on the progress, the workflow of the knowledge base article changes to the following states:

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Field	Description
	○ Review ○ Published ○ Pending retirement ○ Retired
Attachment link	Option to give an attachment for the knowledge base article.
Display attachments	Option to display the attachments individually.
Short description	Short description for the knowledge base article. The short description is displayed as the title of the article.
Article body	Information that is displayed in the knowledge base article. Use the formatting options to change the style of the content. This field appears only if **HTML** is selected from the **Article type** field.
Wiki	Information that is displayed in the knowledge base article as a wiki. Select the **Wikitext** option to preview the text. This field appears if **Wiki** is selected from the **Article type** field.

4. **Optional:** To search existing articles for any duplicate content, select **Search for Duplicates**.
5. Select **Submit**.

Result
The knowledge base article is created.

What to do next
Publish the knowledge base article. For more information, see Publish a workplace knowledge base article.

Publish a workplace knowledge base article

After creating a knowledge base article, publish the article to make it available for employees.

Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

Before you publish, create a knowledge base article. For more information, see Create a workplace knowledge base article.

Procedure
1. Navigate to **All** > **Workplace Core** > **Knowledge management** > **Unpublished articles**.
2. Select the knowledge base article that you want to publish.
3. On the knowledge form, select **Publish**.

Result
The knowledge base article is published for employees to view.

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For more information on how to view the published knowledge base article, see View workplace knowledge base articles.

For more information on how to edit the publish knowledge base article, see Modify a workplace knowledge base article.

View workplace knowledge base articles

View workplace-related updates, processes, and other information in the knowledge base articles that your team created. Rate articles that you find useful.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Workplace Service Portal** > **Workplace Service Portal Home**.
2. Open the knowledge base page.
   - Select the **Knowledge** tab.
   - Select the **Knowledge Base** option.
3. In the KB categories list, select the category of the knowledge base article.
4. **Optional:** If you are unsure about the category, search for the article.
5. From the list of published knowledge base articles, select the article that you want to view.
6. **Optional:** Perform any of the following actions.
   - **Rate the article** out of 5.
   - If you found the article useful, Select **Yes**. If not, select **No**.
   - Leave a comment about the article and select **Submit**. You can also attach files.

Modify a workplace knowledge base article

Update a knowledge base article at any time. Retire a published article or republish a retired article.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

About this task

You can perform the following actions on a knowledge base article:

- Publish the article to make it available to employees.
- Update the article at any time if necessary.
- Retire the article if it is no longer necessary.
- Republish a retired article if necessary.
- Delete an article.

A knowledge base article undergoes the following workflow when it is created:

- Draft
- Review
- Published

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- Pending retirement
- Retired

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Knowledge management**.
2. Select **All articles**.
   You can also select any of the following options to find your knowledge base article.
   - **Published articles**
   - **Unpublished articles**
   - **Retired articles**
3. Select the knowledge base article that you want to modify.
4. Edit the fields that you want to change and select **Update**.
5. To retire, republish or a delete the knowledge base article, select any of the following options on the top right or at the end of the form.

Option	Description
Update	Select this option to update any changes made to the knowledge base article.
Retire	Select this option to remove the knowledge base article from the portal.
Republish	Select this option to republish a retired arti cle.
Delete	Select this option to delete the article from the application.

Result
The knowledge base article is modified with the changes.

Workplace Service Portal

The Workplace Service Portal is a self-service portal for employees, delivering workplace services from a central location. Employees can make reservations, view knowledge base articles, submit and review requests, and get help using virtual agent chat support.

Note:

In Workplace Core version 2.19.0 and above, the navigation path for Workplace Services Portal is not available in the application search context menu **All** > **Workplace Core**. The Workplace Services Portal is currently being deprecated. You can access the Workplace Services Portal from the Employee Center portal home page **All** > **Self-Service** > **Employee Center** > **Workplace Services**.

From the Workplace Service Portal, you can do the following:

- Open the Reservation portal and make reservations for meeting rooms, desks, or any other reservable workplace items.
- Register visitors in advance and customize their visit. You can register a guest or an off-site colleague for either a short duration or a complete day.
- View and search through top-rated knowledge base articles to find information. As you type, the search field displays suggestions based on keywords.

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- View your requests and approvals (if you are an approver).
- Submit requests for general inquiry, registering visitors, shift-based reservations, and other requests.
- Chat with a virtual agent to submit requests and view submitted requests.
- Raise a general help request by selecting from a list of service catalog items.

Workplace dashboards

Use the Workplace dashboards in Workplace Core to get a consolidated view of multiple workplace-related metrics so you can quickly check space utilization and monitor the progress of workplace tasks. Real-time information provides insights to enable making decisions such as how many people in the workforce can be allowed at a given time into the office space.

Workplace Manager Dashboard

Use the Workplace Manager dashboard to monitor the space allocation and workplace maintenance activities at your office campus. For any given day, you can view the details for available spaces, space reservations, pending workplace requests, arrival times for different locations, employee arrivals, and maintenance tasks.

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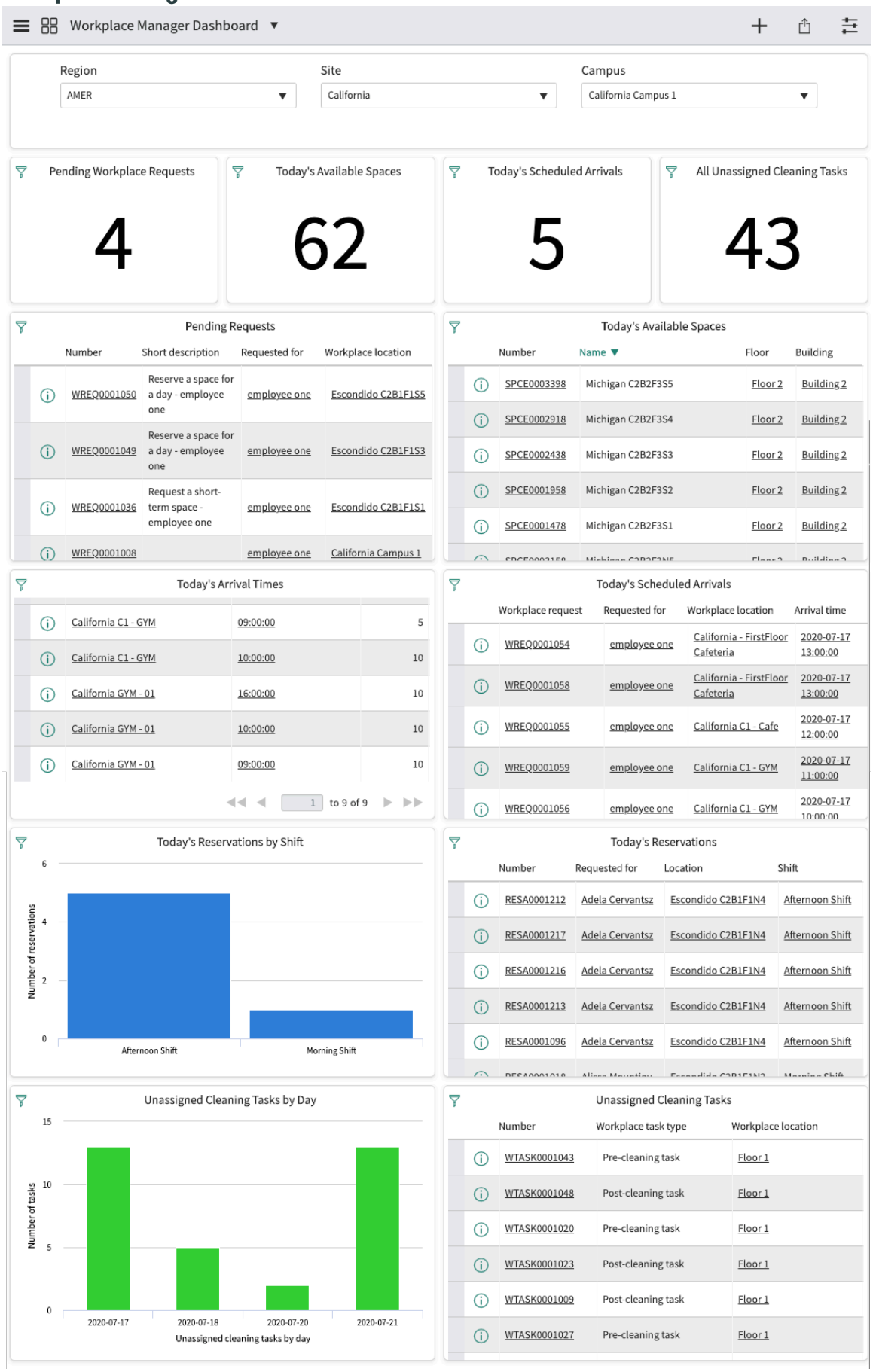
Workplace manager dashboard



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To access the Workplace Manager Dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards**.

Selecting a region, site, and a campus in the Workplace Report Filter at the top of the dashboard displays reports for that campus.

End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace manager: Needs visibility into the real-time status of the workplace space availability, scheduled arrivals, and workplace maintenance.	sn_wsd_core.workplace_manager	• Review pending workplace requests • Monitor workplace reservation requests created by employees • Monitor arrival times • Estimate employee gatherings at common workplace locations using scheduled arrivals • Monitor the progress of workplace tasks

Data visualizations

Data visualizations

Title	Type	Description
Pending workplace requests	Single score	Number of workplace requests that are pending.
Today's available spaces	Single score	Number of active workspaces available for reservations today.
Today's scheduled arrivals	Single score	Number of employee arrivals scheduled for today for different locations on the campus.
All unassigned cleaning tasks	Single score	Number of active workplace tasks that are not assigned to anyone and not in the Closed state.
Pending requests	List	List of pending workplace requests for this campus.
Today's available spaces	List	List of active workspaces available for reservations today.

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Data visualizations (continued)

Title	Type	Description
Today's arrival times	List	List of arrival times scheduled for today for different locations on the campus.
Today's scheduled arrivals	List	List of employee arrivals scheduled for today for different locations on the campus.
Today's reservations by shift	Bar 	Number of workplace reservations for today grouped by their shifts.
Today's reservations	List	Number of workplace reservations for today.
Unassigned cleaning tasks by day	Trend 	Trend of the number of active cleaning tasks per day that are not assigned to anyone and not in the Closed state. The cleaning tasks in this report have a due date between today and the next seven days and include all task types such as planned, unplanned, and ad hoc.
Unassigned cleaning tasks	List	List of active workplace tasks that are not assigned to anyone and not in the Closed state.

Workplace dashboard in Workplace Service Portal

Use the Workplace Dashboard from Workplace Service Portal to visually analyze the available workspace capacity, space request and reservation trends, and monitor the maintenance tasks of your workplace. You can also reserve a space for an employee or create a workplace maintenance task directly from this Workplace Service Portal page.

To open the Workplace dashboard on the Workplace Service Portal, navigate to **Workplace Core** > **Dashboard**.

Selecting a region and site in the filter at the top displays reports for available campuses in separate tabs.

Important: For new customers, from Workplace Core (sn_wsd_core) version 2.2, the **Dashboard** is removed from the Workplace Service Portal and Service Portal. Customers using Workplace Core version 2.1 and below can still access the dashboard after an upgrade.

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Workplace dashboard

Overview of California sites

AMER | California | Last updated Jul 06, 10:24pm

California Campus 2 | California Campus 1

California California Campus 1

Reserve a space

Today's capacity

60

Today's shifts

3

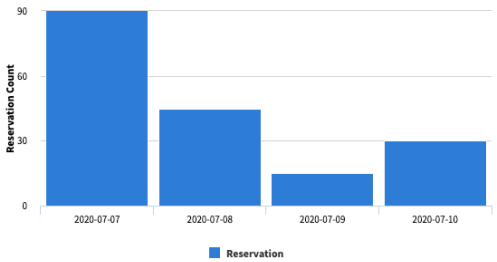
Today's reservable spaces

60

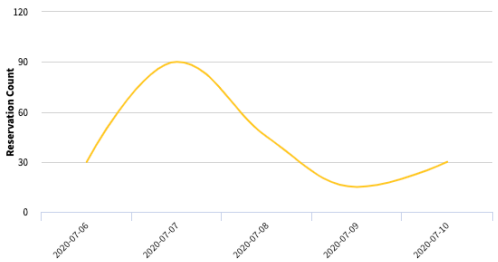
Today's reservations

90

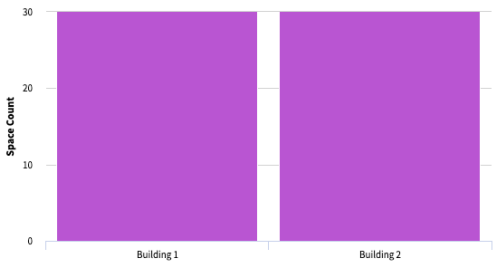
Reservations per day



Reserved spaces per day



Reservable spaces per building



Cleaning tasks for this campus

Add a task

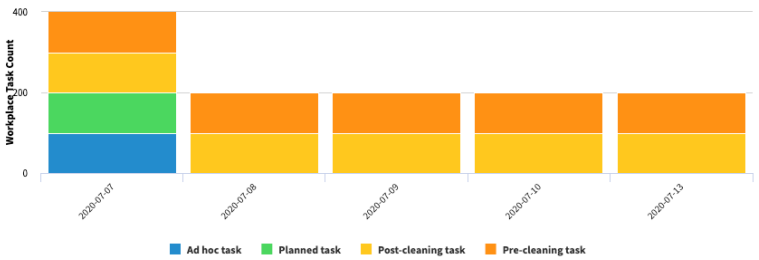
Unassigned cleaning tasks

10

Planned tasks

95

Cleaning tasks by day



Workplace requests for this campus

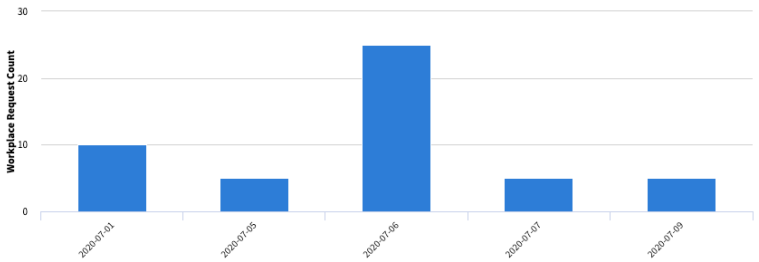
Pending workplace requests

7

Workplace requests created today

23

Workplace requests by day



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End user and roles

Role required based on goal

End user and goal	Required role	Benefits
Workplace manager: Needs clear visibility into the real-time status of the workplace space utilization and cleaning activities for shifts.	sn_wsd_core.workplace_manager	• Can plan for the phased return of employees to the workplace after an emergency situation • Can monitor progress of workplace tasks for various office locations

Data visualizations

The data displayed in visualizations corresponds to the selected campus.

Dashboard data

Title	Type	Description
Today's capacity	Single score	Number of active workspaces available today.
Today's shifts	Single score	Number of shifts used in today's reservations.
Today's reservable spaces	Single score	Number of active workspaces available to reserve.
Today's reservations	Single score	Number of today's active reservations.
Reservations per day	Trend	Trend of the number of active reservations per day in the last seven days for which the end date is today or later.
Reserved spaces per day	Spline	Trend of the number of reserved workspaces per day for all reservations made in the last seven days that are active starting today or later.
Reservable spaces per building	Bar	Breakdown of active workspaces that are available to reserve for each building on the campus.
Cleaning tasks for this campus		
Unassigned cleaning tasks	Single score	Number of active workplace tasks that are not assigned to anyone and not in the Closed state.

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Dashboard data (continued)

Title	Type	Description
Planned tasks	Single score	Number of active planned workplace tasks that are not yet closed.
Cleaning tasks by day	Trend	Trend of the number of active cleaning tasks per day for which the due date is between today and the next seven days, or for which no due date is defined. The tasks in this report are grouped by the workplace task type.
Workplace requests for this campus		
Pending workplace requests	Single score	Number of workplace requests that are pending.
Workplace requests created today	Single score	Total number of workplace reservation requests created by the employees today.
Workplace requests by day	Trend	Trend of the number of workplace reservation requests created per day.

Related topics

- Create workplace reservations for an employee
- Create an ad hoc workplace task

Workplace PPE Inventory Management

Use the ServiceNow® Workplace Personal Protective Equipment Inventory Management application to manage PPE inventory to help safeguard the physical safety of your workforce. Monitor the availability of PPE at different locations, fulfill employee requests for PPE, and track PPE assigned to employees.

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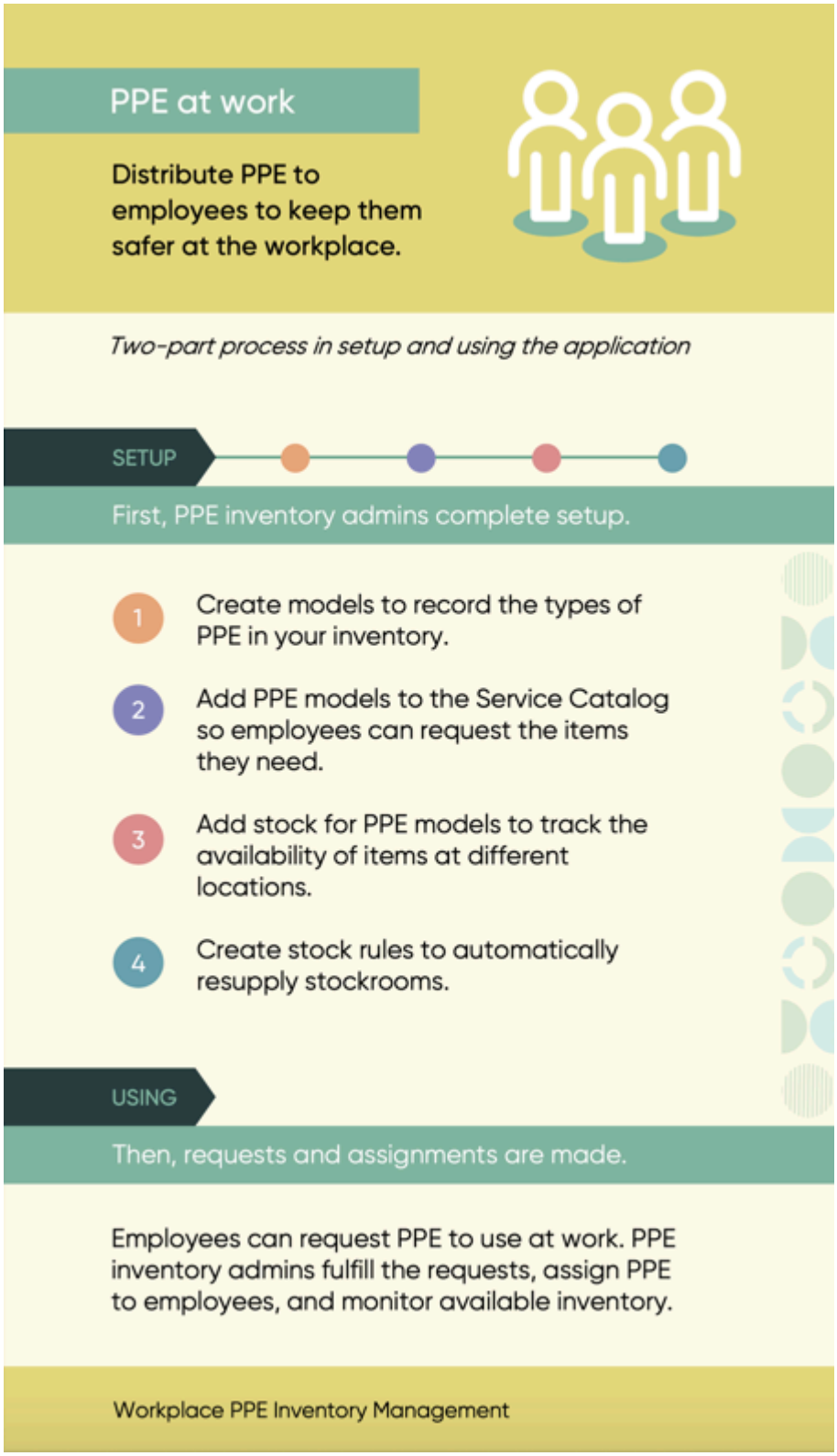

PPE supplies can easily be ordered from the self-service portal via mobile or desktop.#A dashboard provides#a comprehensive view#of inventory#by facility, an#aggregate look at the #entire workplace, and#historical data on how#equipment#levels have changed over time. #Inventory levels can be updated#daily for accurate, real-time inventory management.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications

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on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Use with other Safe Workplace suite applications

Workplace PPE Inventory Management is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.

All Safe Workplace suite applications are available in the ServiceNow Store.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

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Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Install Workplace PPE Inventory Management

You can install Workplace PPE Inventory Management if you have the admin role.

Before you begin

Workplace PPE Inventory Management requires the Asset Management plugin (com.snc.asset_management). Asset Management is active by default.

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `PPE Inventory Management`.
3. Click **Install**.

   The Application installation dialog box opens.
4. **Optional:** Load the demo data by selecting the **Load demo data** check box.

   (Optional) For information about how to install or reinstall demo data after the initial installation, see the Work around to install demo data if application is already installed [KB0722909] article in the Now Support Knowledge Base.
5. Click **Install**.
6. When the installation is complete, click **Close**.

Components installed with Workplace PPE Inventory Management

Several types of components are installed with Workplace PPE Inventory Management, including tables and user roles.

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Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Role title [name]	Description	Contains roles
PPE Inventory Management admin [sn_imt_ppe.ppe_admin]	Can create PPE models, manage PPE inventory, and assign PPE to employees.	• asset • inventory_admin

Tables installed

Table	Description
PPE Model [sn_imt_ppe_ppe_model]	Contains all PPE models.
PPE Stock Log [sn_imt_ppe_ppe_stock_log]	Contains a log of PPE stock additions over time.
PPE Request [sn_imt_ppe_ppe_request]	Contains all employee requests for PPE.
PPE Assignment Log [sn_imt_ppe_ppe_assignment_log]	Contains a log of PPE assignments over time.

Set up Workplace PPE Inventory Management

Complete setup tasks to start using Workplace PPE Inventory Management. Create models for PPE items, add PPE items to your service catalog, add PPE stock, and create stock rules.

Create models for PPE items

Create models to record the types of PPE in your inventory.

Before you begin

Ready-to-use models are installed with Workplace PPE Inventory Management. Create models for any of your PPE items that don't have an existing model. View all models by navigating to **PPE Inventory Management** > **Models** > **All**.

Role required: sn_imt_ppe.ppe_admin

About this task

A model represents a specific type of PPE item. For example, use one model to track all of your N95 masks, and another model to track all of your nitrile gloves.

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Procedure

1. Navigate to **PPE Inventory Management** > **Models** > **Add Model**.

   Note: To create a model in the Now Mobile app, navigate to **Health** > **Manage PPE Inventory** > **Add Model**.

2. On the form, fill in the fields.

Add PPE Model form

Field	Description
Type	Select **Consumable** for disposable PPE like masks or gloves. Select **Hardware** for PPE that is not disposable and could be reassigned, like a ventilator.
Name	Name for the model.
Short description	Short description for the model.
Manufacturer	Manufacturer of the item.
Model number	The specific model number assigned to the item by the manufacturer.
Owner	The person responsible for the model.

3. Click **Submit**.

Add PPE models to Service Catalog

Add PPE models through Service Catalog so employees can request the items they need.

Before you begin

Role required: catalog_admin

Procedure

1. Navigate to **All** > **Service Catalog** > > **Catalog Definitions** > **Record Producers**.
2. Filter the category to Personal Protective Equipment (PPE).
3. Click one of the record producers.
   Any record producer in the Personal Protective Equipment (PPE) category will work.
4. Click **Copy**.
5. Update the **Name**, **Model**, **Description**, and **Picture** fields for the item.
6. In the **Script** field, replace the sys_id value with the sys_id for the PPE model that you're adding to your service catalog.
   The sys_id is a unique alphanumeric code. To get the sys_id for a PPE model, navigate to the PPE model record, right-click the form header, and select **Copy sys_id**.
7. Click **Update**.

What to do next

Add the Personal Protective Equipment (PPE) category to your service catalog so employees can see the items. To add the category, navigate to **Self-Service** > **Service Catalog** and click the plus icon (+) in the upper right.

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Add PPE stock

Add stock for a PPE model to track the availability of the item at different locations.

Before you begin

Create stockrooms for your PPE. To create a stockroom, navigate to **PPE Inventory Management** > **Inventory** > **Stockrooms**. For more information, see Stockrooms.

Role required: sn_imt_ppe.ppe_admin

Procedure

1. Navigate to **PPE Inventory Management** > **Inventory** and select **Add Consumable Stock** or **Add Hardware Stock**.

   Note: To add PPE stock in the Now Mobile app, navigate to **Health** > **Manage PPE Inventory** and select **Add Consumable Stock** or **Add Hardware Stock**.

2. On the form, fill in the fields.

   Add PPE Stock form

Field	Description
Model	The model to add stock for.
Stockroom	The stockroom where the PPE is located. **Note:** Only the stockrooms that have the model appear.
Quantity	The number of items in stock. **Note:** For hardware items, the quantity must be 1 so that each item is tracked with a unique asset tag and serial number. You can only enter an amount that is equal to or less than what is in stock.
Asset tag	The asset tag for the item. This field is only visible for hardware models.
Serial number	The serial number for the item. This field is only available for hardware models.

3. Click **Submit**.
   The stock log is updated with the PPE stock that you added. To view the stock log, navigate to **PPE Inventory Management** > **Inventory** > **Stock Log**.

What to do next

After adding PPE stock, you can view all of your available PPE by navigating to **PPE Inventory Management** > **Inventory** and selecting **Consumables in Stock** or **Available Hardware**.

Note: The **Consumables in Stock** and **Available Hardware** pages have a **New** button. Do not add PPE stock using the **New** button. Using this button does not update the stock log.

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Reduce PPE stock

Reduce stock for a Personal Protective Equipment (PPE) model to reflect accurate inventory at different locations.

Before you begin

Role required: sn_imt_ppe.ppe_admin

Procedure

1. Navigate to **All** > **PPE Inventory Management** > **Inventory** and select **Reduce consumable stock** or **Reduce hardware stock**.

   Note: To reduce PPE stock in the Now Mobile app, navigate to **More** > **PPE Stock** and select **Reduce Consumable Stock** or **Reduce Hardware Stock**.

2. On the form, fill in the fields.

Reduce consumable stock form

Field	Description
Model	The model to remove stock for.
Stockroom	The stockroom where the PPE is located.
Quantity	The number of items to be reduced from stock. **Note:** This field is not available for hardware items. The quantity must be `1` so that each item is tracked with a unique asset tag and serial number.
Asset tag	The asset tag for the item. This field is only visible for hardware models. **Note:** If you enter an asset tag, only the stockrooms that contain the asset appear.
Serial number	The serial number for the item. This field is only available for hardware models. **Note:** If you enter a serial number, only the stockrooms that contain the serial number appear.
Comments	The reason that you're reducing stock.

Hardware stock

When reducing hardware models, if the asset tag and model number are not entered, the stock is removed from the stockroom listed first and the amount is set to zero (0).

When a model and asset tag are entered, or if the model and serial number are entered, hardware stock is matched and the amount is set to zero (0).

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Consumable stock

If you try to enter a quantity larger than the quantity that is in stock, the system does not allow you to proceed.

3. Click **Submit**.
   The stock log is updated with the PPE stock that you removed. To view the stock log, navigate to **PPE Inventory Management** > **Inventory** > **Stock Log**.

Create stock rules for PPE

Create a stock rule to automatically resupply a stockroom with an item.

Before you begin

Role required: sn_imt_ppe.ppe_admin

About this task

When an item drops below a specified quantity, the stock rule automatically creates a transfer order. The transfer order resupplies the stockroom by transferring the required items from another stockroom. For more information about transfer orders, see Transfer orders.

Procedure

1. Navigate to **All** > **PPE Inventory Management** > **Inventory** > **Stock Rules**.
2. Click **New**.
3. On the form, fill in the fields.

Stock Rule form

Field	Description
Model	The product model for the rule.
Threshold	The item quantity that triggers a restock. For example, enter a threshold of 150 for masks that should be restocked when inventory drops below 150 in the specified stockroom.
Restocking option	Stockroom. This value is automatically populated.
Parent stockroom	The stockroom that the new items are transferred from.
Active	When selected, the rule is active and items are automatically restocked. When cleared, the rule is not active and items are not automatically restocked.
Stockroom	The stockroom that you want to be automatically restocked by the rule.
Order size	The number of new items to order for the stockroom.

4. Click **Submit**.

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PPE Inventory Overview dashboard

Use the PPE Inventory Overview dashboard to track PPE items that are in stock, on order, and assigned to employees.

To view the dashboard, navigate to **PPE Inventory Management** > **Overview Dashboard**.

PPE Inventory Overview dashboard

End users and roles

End user and goal	Required role
PPE Inventory Management admin: Track PPE in stock and assigned over time. Plan ahead to anticipate PPE needs and ensure that all employees have access to the appropriate PPE.	sn_imt_ppe.ppe_admin

Reports

Title	Description
PPE Items Consumed	Number of consumable PPE items assigned to employees.
PPE Items In Stock	Number of PPE items in stock.
PPE Items On Order	Number of PPE items on order.
PPE Items In Transit	Number of PPE items in transit.
PPE Items In Use	Number of hardware PPE items assigned to employees.
PPE Items Missing	Number of PPE items that are missing.
PPE Stockrooms By Type	Number of each type of stockroom that stores PPE.
Consumables Distributed By User	Number of consumable PPE items assigned to each employee.
Consumables In Stock By Location	Number of consumable PPE items in stock at each location.
Consumable Models	All models for consumable PPE.
Stock Rules	All stock rules for PPE.

Request PPE

Use Service Catalog to request personal protective equipment (PPE) for you to use at your workplace.

Before you begin
Role required: sn_imt_ppe.ppe_admin

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Procedure

1. Navigate to **All** > **Self-Service** > **Service Catalog** and click **Personal Protective Equipment (PPE)**.

   Note: To request PPE in the Now Mobile app, navigate to **Health** > **Follow These Safety Practices** > **Request PPE**.

2. Click the item that you want to order.
3. Select a quantity for the item.
4. Click **Submit**.

What to do next

View the status of your request by navigating to **PPE Inventory Management** > **My Requests**.

Fulfill a request for PPE

View employee requests for personal protective equipment (PPE). Fulfill the requests to make sure that employees get the PPE they need to stay safe at the workplace.

Before you begin

Role required: sn_imt_ppe.ppe_admin

Procedure

1. Navigate to **All** > **PPE Inventory Management** > **Requests**.
2. Click the request that you want to work on.
3. In the **State** field, select **Work in Progress**.
4. In the **Stockroom** field, select the stockroom that you want the items to come from.
   When you select a stockroom, the **Manager** field is automatically populated with the manager for that stockroom. When you update the request, the **Assigned to** field is also automatically populated with that manager unless you specify another user.
5. In the **Quantity** field, enter the number of items to assign to the employee.
   This number might be different from the requested quantity if the employee requested too many items, or if the stockroom doesn't have enough inventory to fulfill the request. If the stockroom doesn't have enough inventory, you will see an error message when you update the request so that you don't assign more items than you have in stock.
6. Click **Update**.

What to do next

When the employee receives their PPE, update the request state to **Closed Complete**. A record is added to the assignment log and the consumable state changes to Consumed.

If the request won't be fulfilled, update the state to **Closed Incomplete**.

Assign PPE to employees

You can assign PPE directly to an employee without them submitting a request.

Before you begin

Role required: sn_imt_ppe.ppe_admin

About this task

If an employee submits a request for PPE, follow the steps to Fulfill a request for PPE instead.

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When you assign hardware PPE to an employee, the state changes from **In stock** to **In use**. The state can be updated and the item can be reassigned to another employee.

When you assign consumable PPE to an employee, a consumable record is created with the quantity allocated to the employee. The state is set to **Consumed** and is read-only. Consumable PPE cannot be reassigned to another employee.

Note: Don't use the **Consume** button on consumable records to assign PPE. Instead, use the following steps.

Procedure

1. Navigate to **PPE Inventory Management** and select **Assign Consumable** or **Assign Hardware**.

   Note: To assign PPE in the Now Mobile app, navigate to **Health** > **Manage PPE Inventory** and select **Assign Consumable** or **Assign Hardware**.

2. On the form, fill in the fields.

Assign PPE form

Field	Description
Model	The model to assign.
Issuing stockroom	The stockroom where the PPE is located.
Assigned to	The employee that you're assigning PPE to.
Quantity	The number of items to assign. This field is only available for consumable models.
Hardware	The specific item to assign, with a unique asset tag or serial number. This field is only available for hardware models.

3. Click **Submit**.
   The assignment log is updated with the PPE you assigned. To view the assignment log, navigate to **PPE Inventory Management** > **Assignment Log**.

What to do next

After assigning PPE to employees, you can view all assigned PPE by navigating to **PPE Inventory Management** > **Inventory** and selecting **Assigned Hardware** or **Consumed**.

Note: The **Assigned Hardware** and **Consumed** pages have a **New** button. Do not assign PPE using the **New** button. Using this button does not update the assignment log.

Safe Workplace Dashboard

The ServiceNow® Safe Workplace Dashboard provides leaders in HR, Workplace Services, and Health & Safety with a complete view of operations. Leaders have visual insight into the status of work sites and users to determine whether a site is ready to resume a safe operation.

The Safe Workplace Dashboard relies on ServiceNow® Performance Analytics Premium features to evaluate and display data that comes from other Safe Workplace suite applications and the COVID-19 Global Health Data Set.

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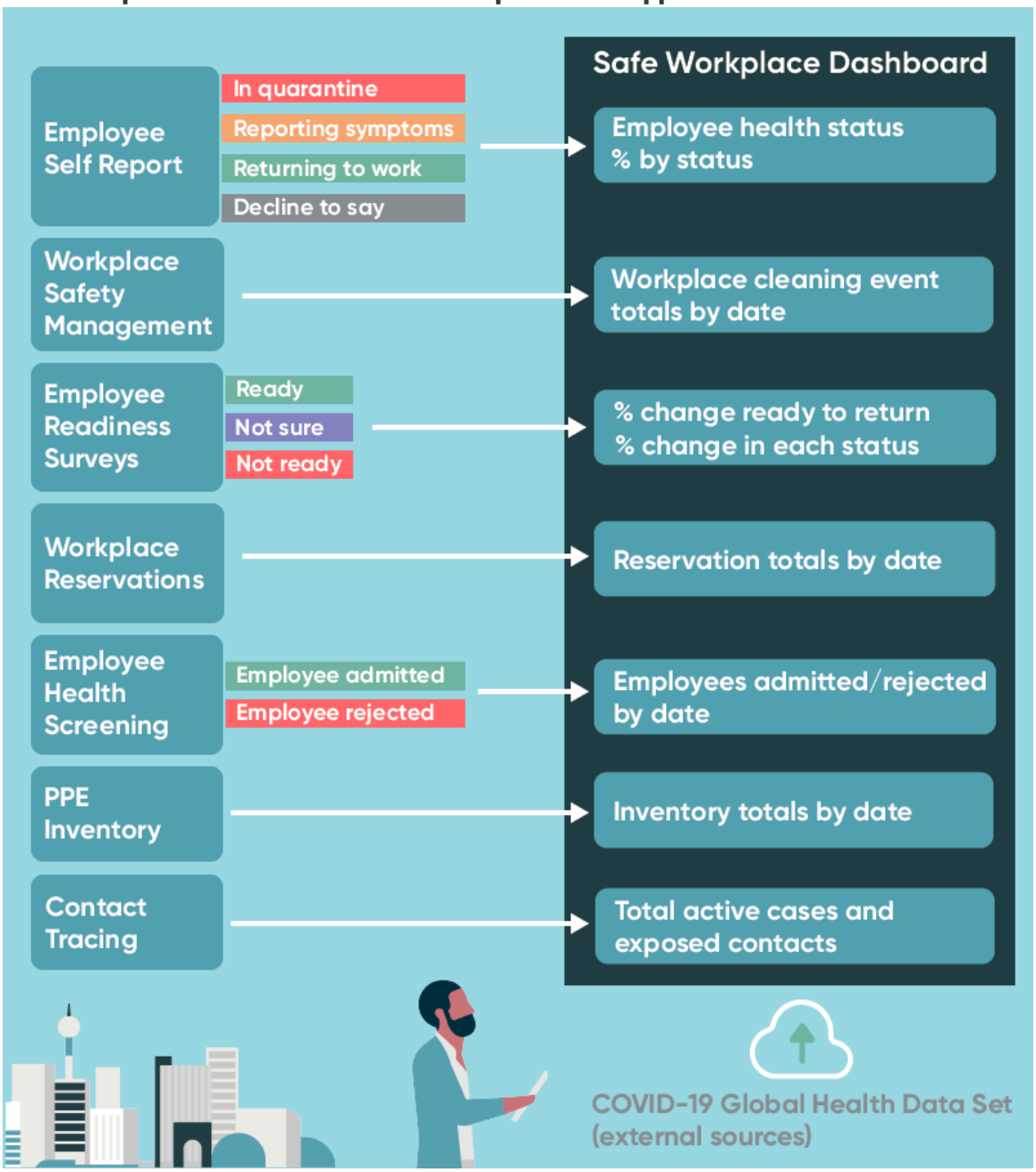
Safe Workplace Dashboard and Safe Workplace suite applications



Install and configure the listed Safe Workplace suite and Emergency Response Management applications. Follow the configuration instructions to ensure that the data feeds to the dashboard successfully.

Note: Safe Workplace Dashboard does not support domain separation.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

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Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Install the Safe Workplace Dashboard

Install the Safe Workplace Dashboard application. You can install this application If you have the admin role.

Before you begin
Ensure that the application and all of its associated ServiceNow® Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

The `Map existing campus with locations` fix script creates the initial mapping entries between the Campus [sn_wsd_core_campus] table and the Location [cmn_location] table.

Note: Check that all existing campuses have sites and regions populated before running this script.

Use the default setting **active=false** to avoid incorrect mappings in the Campus [sn_wsd_core_campus] table.

Run this script after activating the Safe Workplace Dashboard (sn_imt_dashboard) plugin and ensuring that your existing campuses have sites and regions populated.

After running the `Map existing campus with locations` fix script, validate that all campuses and locations are accurate. For inaccurate data, remove entries and see Manually map a location and campus for more information.

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

The Safe Workplace Dashboard application requires the ServiceNow® Performance Analytics - Premium application. If you're not already subscribed to Performance Analytics - Premium, you must install it before installing Safe Workplace Dashboard.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search field.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from the ServiceNow Store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they're not already installed.

   Installing your application also automatically installs the dependent applications or plugins if they're not already installed.

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5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.
   Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Note: If you don't load the demo data for a store application during installation, it's not available to load later.

6. Click **Install**.
7. When the installation is complete, click **Close**.

Components installed with the Safe Workplace Dashboard

Components are installed with the Safe Workplace Dashboard, including user roles, scheduled jobs, and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Safe Workplace Dashboard user [sn_imt_dashboard.user]	View the dashboard information and drill into locations.	pa_viewer
Safe Workplace Dashboard administrator [sn_imt_dashboard.admin]	Manage alert types and set system properties.	sn_imt_dashboard.user

Scheduled Safe Workplace Dashboard data collector jobs installed

The data collector jobs installed with the Safe Workplace Dashboard are set to run daily and collect data for use in the dashboard and its widgets.

Scheduled job	Description
[PA Workplace Service Delivery] Daily Data Collection	Collects metrics from Safe Workplace suite apps starting from the previous day to the current day. A user with the pa_data_collector role can change the parameters.
Aggregate campus status data	Collects data from check-ins and campus statuses to populate the Reopening Check-In Count [sn_imt_dashboard_reopening_checkin_count] table. Runs daily at 23:00 instance time.

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Tables installed

Table	Description
Alerts [sn_imt_dashboard_alerts]	Alerts by campus, generated from active alert types.
Alert Types [sn_imt_dashboard_alert_types]	Alert types are PA thresholds below which an alert is generated and displayed on the Safe Workplace Dashboard.
Breakdown All Time Values [sn_imt_dashboard_campus_all_time_values]	PA breakdown values, stored by campus.
Phase Definitions [sn_sw_planner_phase]	Definitions of phases and their assigned locations. Used to categorize what phase of reopening a location is in. A location can be in only one phase at a time. A phase has a name, location, description, and allowed maximum occupancy percentage that is allowed during the phase. Phase definitions are required for information to populate widgets in the Safe Workplace Dashboard Reopening page.
Campus Statuses [sn_sw_planner_campus_status]	Primary table containing data that determines the current status of each location in the reopening page and widgets of the Safe Workplace Dashboard.
Reopening Check-In Audience [sn_imt_dashboard_reopening_checkin_audience]	Table containing check-in audiences and their criteria based on the organization's configurations. Administrators can create Check-In Audiences using the condition builder to create users. Users are uniquely counted across tables even if they have the same user ID. Check-In Audiences are required to provide information to populate widgets in the Safe Workplace Dashboard Reopening page.
Reopening Check-In Count [sn_imt_dashboard_reopening_checkin_count]	The Aggregate campus status data scheduled job automatically populates the table with the dates and locations of all check-ins.
Campus Status Log [sn_imt_dashboard_reopening_campus_status_log]	Tracks campus statuses and how a location's status changes through each phase.

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Safe Workplace Dashboard properties

Set up Safe Workplace Dashboard properties to add your Mapbox API token and configure how indicators are displayed across timezones.

You can obtain a token from Mapbox to add features to the Safe Workplace Dashboard map. The base system map is from OpenStreetMap, a collaborative, open source map application.

Mapbox requires a subscription, and their documentation site describes how to obtain an API token to add the extra features. For more information, open the Mapbox web site and select **Documentation** in the header.

To set properties , navigate to **Safe Workplace Dashboard** > **Properties**.

Safe Workplace Dashboard properties

Property	Description
Enter your Mapbox API Token to enable additional Mapbox features. Obtain an API token from https://www.mapbox.com/. [sn_imt_dashboard.Mapbox Token]	Obtain a Mapbox token to add display features to the Safe Workplace Dashboard. This setting is optional. • Type: **text** • Default value: **none** • Location: **Safe Workplace Dashboard** > **Properties** • Learn more: Read the documentation on the Mapbox website.
Use Indicator PA job timezone [sn_imt_dashboard.Use Indicator Job Timezone]	When enabled, the Performance Analytics (PA) indicators shown on the Safe Workplace Dashboard are displayed using the time zone of the indicator's data collection job. If the indicator job time zone is not set, the instance time zone is used instead. The indicators are displayed identically for all users viewing the dashboard, regardless of the user's time zone. When not enabled, the PA indicators are displayed based on the user's time zone. The indicators may show different daily data to users in different time zones. For example, an event occurs in the evening in Seattle, which is the next day's morning in Berlin. A user in Seattle sees the event in the data for October 5, while a user in Berlin sees the event in the data for October 6.

Safe Workplace Dashboard widgets

The Safe Workplace Dashboard comprises ServiceNow® Service Portal widgets that are populated by Performance Analytics widgets.

Service Portal widgets in the Safe Workplace Dashboard

- Active Contact Tracing Cases
- Safe Workplace Dashboard Announcement
- Safe Workplace Dashboard Survey Sentiment
- Safe Workplace Dashboard Favorite Location
- Safe Workplace Dashboard Filter
- Safe Workplace Dashboard Employee Health

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- Safe Workplace Dashboard Main Summary
- Safe Workplace Dashboard Site Details
- Safe Workplace Dashboard Main
- Safe Workplace Dashboard Overview Maps
- Safe Workplace Dashboard Site Details Ba
- Safe Workplace Dashboard PA
- Safe Workplace Dashboard Survey Donut
- Safe Workplace Dashboard Alerts
- Safe Workplace Dashboard Menu
- Safe Workplace Dashboard Vaccination Widget

For information about customizing Service Portal widgets, see Service Portal widgets and the Widget developer guide.

Performance Analytics widgets

- Active Cases
- Number of Workplace Reservable Spaces
- Employees Rejected % Change from Prior Day
- Number of Employees Ready to Return
- Number of Employees Not Ready to Return
- Number of employees rejected
- % of Employees That Want To Return To Work
- Reserved Spaces
- Number of employees surveyed for readiness return
- PPE Inventory (time series)
- PPE Inventory (score)
- Number of Workplace Spaces
- Reservable vs Reserved Spaces
- Number of employees admitted Workplace Reservations
- Reservable Spaces
- Employees Admitted
- Employee Entry Health Monitoring
- Employees Rejected
- Number of Workplace Reserved Spaces
- PPE Inventory % Change from Prior Day

For information about using Performance Analytics, see Performance Analytics.

Create a campus to appear on the Safe Workplace Dashboard

You can create a campus from existing locations to appear on the Safe Workplace Dashboard.

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Route the following information to the Safe Workplace Dashboard and display this information by campus:

- User health and willingness to return to work.
- Building readiness.
- Personal protective equipment inventory.
- Active contact tracing cases.
- Potentially exposed contacts under investigation.

Ensure that you install and use the following applications for the Safe Workplace Dashboard. Each application has a reference to a location.

- ServiceNow® Emergency Self Report references the location in the user's profile.
- ServiceNow® Emergency Outreach with Employee Readiness Surveys installed. These applications reference the location in the user's profile.
- ServiceNow® Workplace PPE Inventory Management has defined stockrooms, and the location is a required field for a stockroom.
- ServiceNow® Employee Health Screening has a form for selecting a location and a user to submit the compliance values.
- The Space Administration module of ServiceNow Workplace Core is where organization facilities are defined. Within a building, floors, areas, and workspaces are defined. These definitions provide for proximity screening, cleaning assignments, and workspace reservations.

  One or more buildings are assigned to a campus. The location icons displayed on the Safe Workplace Dashboard overview show the campus and any associated buildings when you point to an icon.
- ServiceNow Contact Tracing references the affected person's campus from a case. If the campus information is not available, then Contact Tracing references the location in the affected person's user profile.

Note: When selecting locations for users, stockrooms, and entry requests, select a company location that existed before you installed Workplace Core. Don't select a site, campus, or building created in the Workplace Core application.

For Workplace PPE Inventory Management, Employee Health Screening, and others, the location must be tied to a Workplace Core campus or building for the location to appear on the Safe Workplace Dashboard.

Safe Workplace Dashboard map with location icons



The locations [cmn_location] defined for the organization are the reference that Performance Analytics uses to generate alerts. Configure the building definitions in Workplace Core with a parent location and the corresponding latitude and longitude.

To associate locations with infectious diseases, such as COVID-19 data, from the COVID-19 Global Health Data Set, verify that all locations are associated with a state or country.

Create a campus to appear on the Safe Workplace Dashboard

There are multiple methods that you can use to create a campus that appears on the Safe Workplace Dashboard.

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- Auto-map a location and create a campus.
- Manually associate a location and create a campus.
- Manually map a location to a campus (Workplace Core).

Auto-map multiple locations and create campuses

You can create multiple campuses with corresponding latitude and longitude coordinates and a site automatically by selecting multiple locations.

The campuses appear on the Safe Workplace Dashboard.

Manually map a location to a campus

You can map an existing campus to an existing location manually and have it appear on the Safe Workplace Dashboard.

Manually map a location to a campus (Workplace Core)

As an alternative, you can use Workplace Core to manually create a campus and have it appear on the Safe Workplace Dashboard.

Auto-map a location and create a campus

Create multiple campuses automatically by mapping them from locations so that they appear on the Safe Workplace Dashboard.

Before you begin

Role required: sn_imt_dashboard.admin

Procedure

1. Navigate to **All** > **Safe Workplace Dashboard** > **Campus Locations**.
2. Click **Generate Campuses**.
   The Add Locations pop-up appears.
3. Select all the locations that you want to be a campus.
   The *Populate OpenStreetMap data* scheduled job runs every five (5) minutes and queries the Campus Locations [sn_imt_dashboard_locations] table. If the latitude and longitude are missing, an open street API is called to fetch the coordinates and update the Campus [sn_wsd_core_campus] table by passing the zip code and country name.
4. Click **Add Locations to Dashboard**.

Result

A site is created based on the parent name. The parent name is based on the location name. If a region does not exist, a region is created.

Manually map a location and campus

Manually map an existing location to an existing campus and site using Campus Locations.

Before you begin

Role required: sn_imt_dashboard.admin

Procedure

1. Navigate to **All** > **Safe Workplace Dashboard** > **Campus Locations**.
2. Click **New**.

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3. On the form, fill in the fields.

Campus Locations form

Field	Description
Location	Click the Lookup using list icon ( ) and select the location that you want to associate with a campus and site.
Campus	Click the Lookup using list icon ( ) and select the campus that you want to associate with a location and site.
Site	Click the Lookup using list icon ( ) and select the site that you want to associate with a location and campus.

4. Click **Submit**.

Manually map a location to a campus (Workplace Core)

Use Workplace Core as an alternative to the Safe Workplace Dashboard to manually map a location to a campus so that it appears on your Safe Workplace Dashboard.

Before you begin

Role required: sn_wsd_core.workplace_manager

About this task

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration** > **Campuses** > , and click **New**.
2. Follow the steps in Configuring the form layout to add the **Parent** , **Latitude** , and **Longitude** fields to the Campus form.
3. In the list of campuses, open a record and complete the following steps.

   a. Select a parent location for the campus.
   Do not select a site, campus, or other building that you set up in Workplace Core. Select a location from preexisting records.

   b. Click the preview icon ( ) next to the parent location.

   c. Copy the latitude and longitude values from the preview window and paste them into the corresponding Campus form fields.

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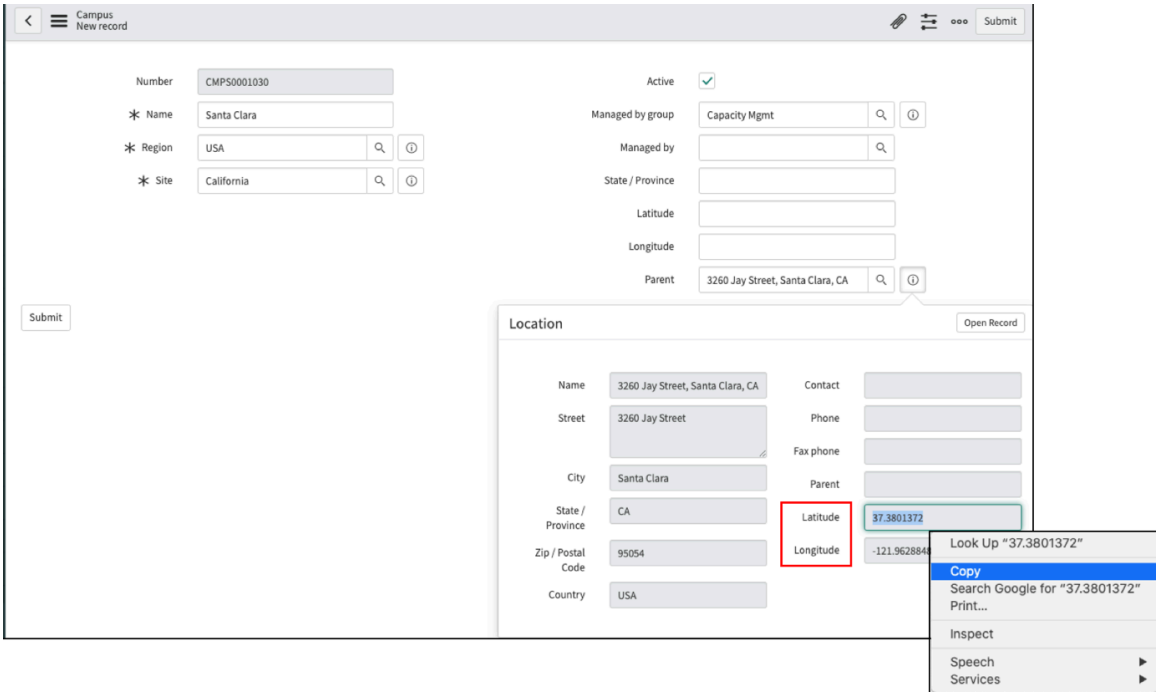

d. Click **Update**.

4. Continue updating campus records until they all have a parent location and the corresponding latitude and longitude values.

Alert types used with the Safe Workplace Dashboard

Alert types define the ServiceNow® Performance Analytics (PA) thresholds used to generate alerts on the Safe Workplace Dashboard. Alerts are generated from application data once per day.

Alert types in the base system

Alert type	Description
Employees Want to Return	Uses Employee Readiness Surveys responses to calculate the number of people who are ready or mostly ready, and the number of people who are not sure or not ready to return.
PPE is low	Uses the Workplace PPE Inventory Management count of PPE assets to identify when the available inventory falls below a threshold.
Screening Rejections Low	Uses Employee Health Screening entry requests to calculate the number of people denied entry.
Active Contact Tracing Cases	Uses Contact Tracing cases to determine when the number of active cases is greater than the threshold.

A user with the pa_admin role can define additional alert types. For information about using Performance Analytics, see Performance Analytics.

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Using the Safe Workplace Dashboard

By using a map, you can review your organization's status regarding personnel and facility readiness to reopen.

Focus on alert information regarding user readiness, personal protective equipment (PPE) inventory levels, health monitoring results, and active contact tracing cases created for affected users. View status data, by facility, to prepare the reopening of the facility and send invitations to users to return.

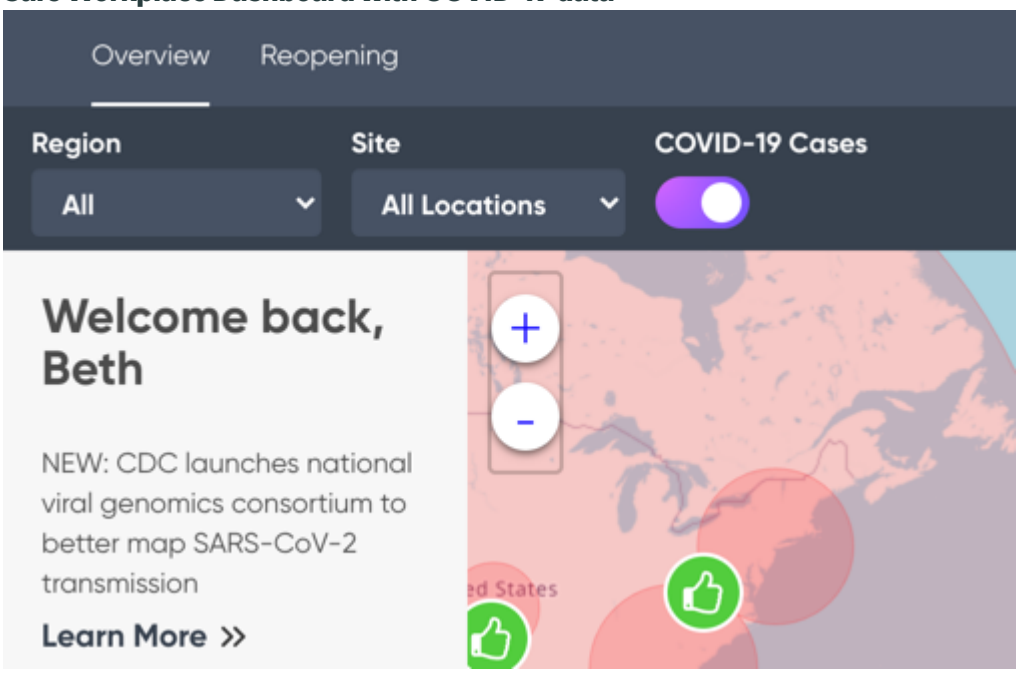
The Safe Workplace Dashboard presents data when the correlated Safe Workplace suite , ServiceNow® Contact Tracing, and ServiceNow® Emergency Response Management applications are installed. Verify that configuration is complete so that the application data is included when the ServiceNow® Performance Analytics data collection job runs.

Note: Assign Safe Workplace Dashboard users the pa_viewer role. This role is required to view the dashboard content.

COVID-19 Global Health Data Set

You can use the COVID-19 Global Health Data Set application at no extra charge. COVID-19 Global Health Data Set is installed with the Safe Workplace Dashboard. It appears as an application in the instance navigation menu, and displays global COVID-19 information on request in the Safe Workplace Dashboard.

Safe Workplace Dashboard with COVID-19 data



Navigate to **COVID-19 Global Health Data Set** to view the collected data by date ranges, locations, state/provinces, and countries. Build reports or export the data to use for your own analysis.

COVID-19 Global Health Data Set sources

Data source	Description
European Centre for Disease Prevention and Control (ECDC)	COVID-19 metrics for the European Union and European Economic Area from the European Centre for Disease Prevention and Control. For

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COVID-19 Global Health Data Set sources (continued)

Data source	Description
	more information on this data source, see the European Centre for Disease Prevention and Control website.
Government of Canada Public Health Infobase	COVID-19 metrics for Canada from the Canadian government. For more information on this data source, see the Government of Canada Public Health Infobase website.
Our World in Data (OWID)	Worldwide COVID-19 metrics from Our World in Data. For more information on this data source, see the OWID GitHub repository.
USA Facts	COVID-19 metrics for the United States from USA Facts. For more information on this data source, see the USA Facts website.

Use the Safe Workplace Dashboard

Navigate to **Safe Workplace Dashboard** > **Safe Workplace Dashboard** to open the dashboard in a new browser window.

Locations with alerts are listed on the left. Click the arrow on the card or the location icon to zoom in to the location and its alerts. Use the Region and Site lists at the top left to select specific regions and sites to review.

To add a favorite location, click **Manage Favorites** and search for the location. After you select it, the location name appears in the header (**R1 S1** in the example image). Click the location to open it directly. To remove a location from favorites, click **Manage Favorites** again and click the **(x)** on the location you want to remove.

Note: The Safe Workplace Dashboard shows only PPE inventory and health screening data associated with a Workplace Core campus or building. PPE stockrooms and health screenings must have a Workplace Core campus or building selected in the **Location** field to be displayed on the dashboard. For information about creating Workplace Core campuses and buildings, see Providing your workplace data.

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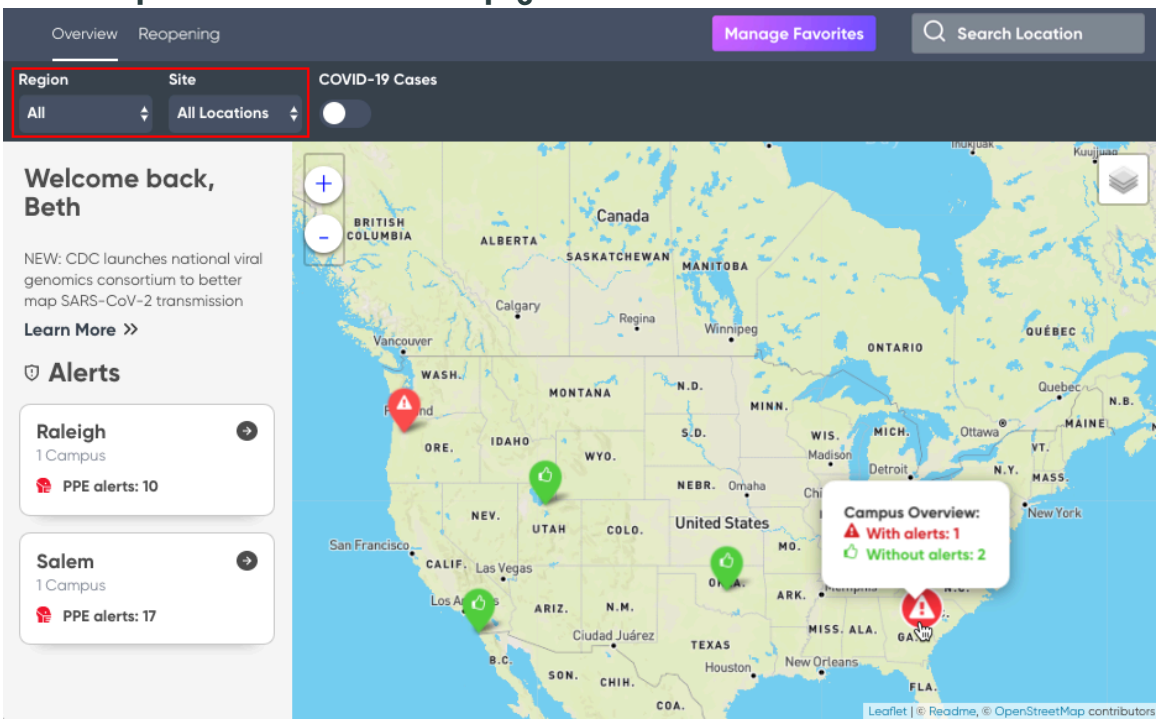
Safe Workplace Dashboard overview page



Continue drilling down to a facility to see its recent statuses. The New Confirmed COVID-19 Cases widget provides data from the COVID-19 Global Health Data Set. It shows the number of new cases and deaths for the location, and can also show the number of new cases and deaths per 100,000 people if population data for the location is available. For locations in the United States, you can filter the New Confirmed COVID-19 Cases widget to show data at the state or county level. The *`Populate OpenStreetMap data`* scheduled job retrieves county data for campuses.

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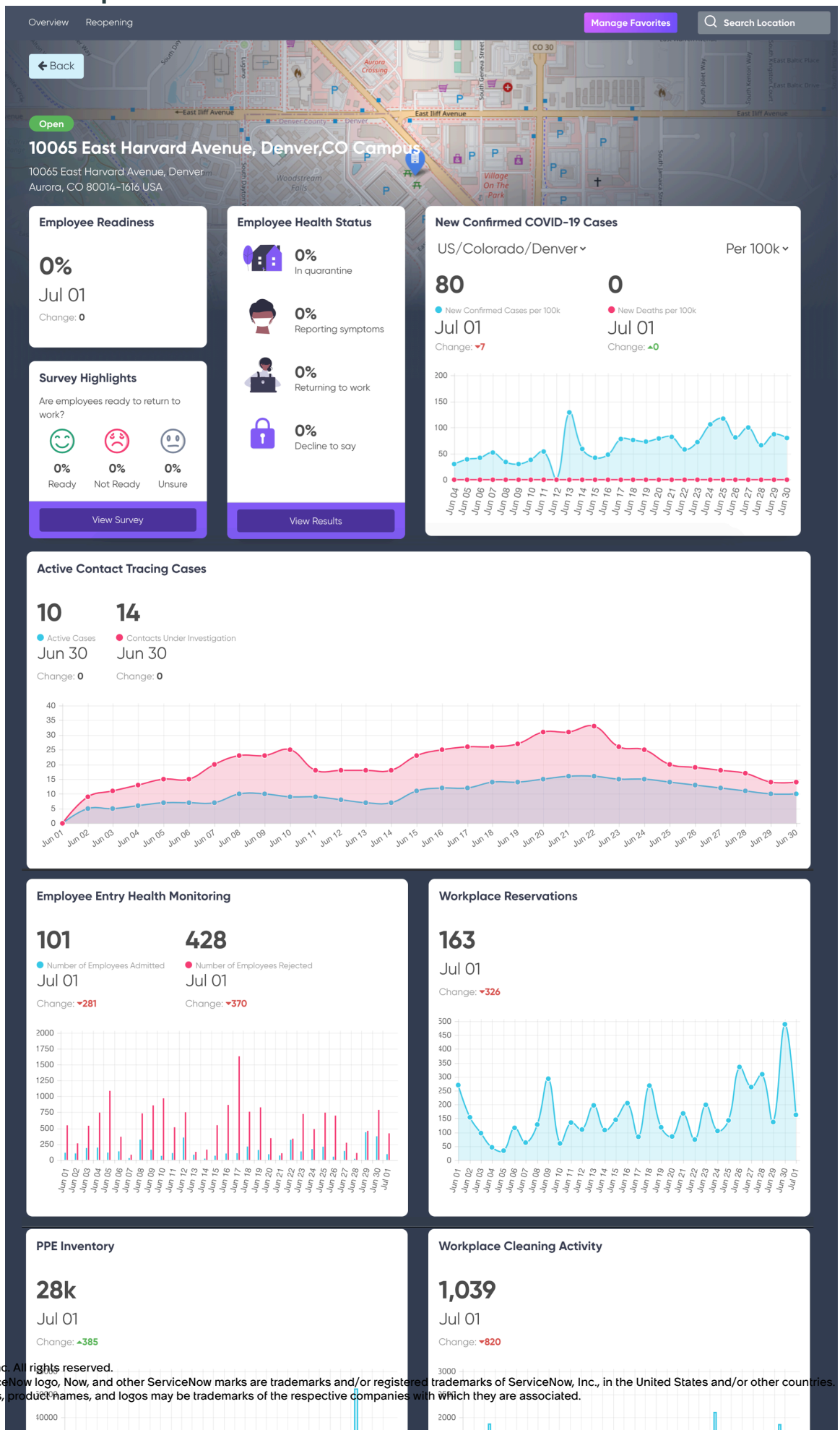
Safe Workplace Dashboard



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Use the information to organize the reopening of the facility and reduce workplace transmission of infectious diseases, such as COVID-19.

- Order PPE inventory if levels are low.
- Send an outreach survey to reassess user readiness to return.
- Verify that the workplace cleaning schedule is on track to reopen safely.
- Encourage managers to have users make workspace reservations to return.
- Create cases for affected users and tasks for the follow-up interviews with potentially impacted users.

Review the Safe Workplace Dashboard Reopening page

View the Safe Workplace Dashboard Reopening page by clicking **Reopening**to see visualizations of reopening data across three widgets:

- The Location Reopened Status displays what regions are open and shows how many are open by region.
- Approved Worker Count vs. Avg Daily Check-Ins provides information to help determine whether too few or too many people are being checked in for the current week.
- The Campus Status widget is a filterable view with an overview of campus locations and metrics such as the current phase, maximum daily occupancy percent, and number of approved workers. You can manually add or edit locations by selecting the campus or clicking **New**.

Note: A location cannot have more than one campus status at a time.

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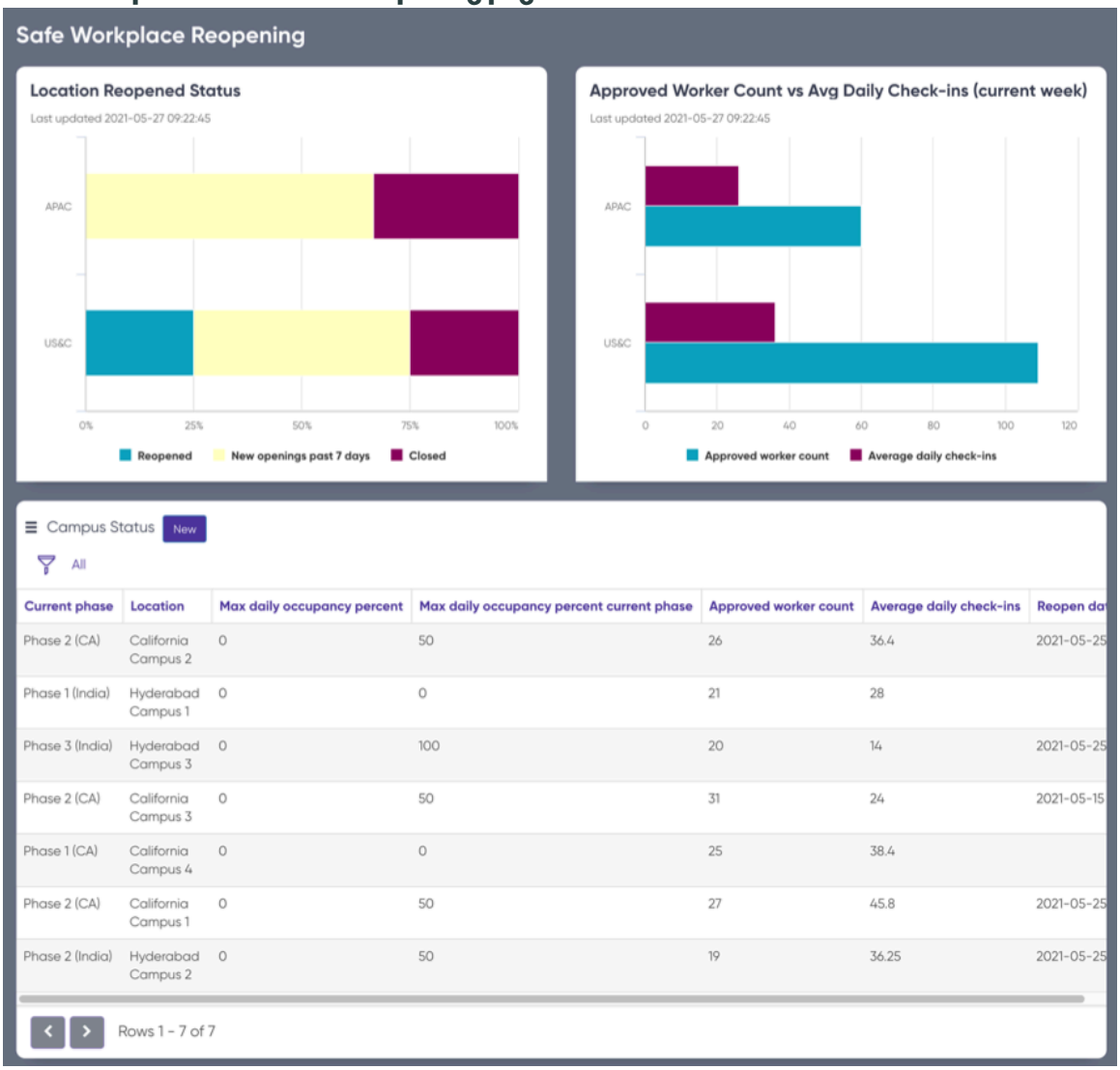
Safe Workplace Dashboard Reopening page



To populate the Safe Workplace Dashboard page, create Phase Definitions to track locations through their various phases. Otherwise, no data will display. Updates are performed daily at 23:00 instance time regardless of the number of campuses in your organization and their geographic location.

For each phase, navigate to **Safe Workplace Dashboard** > **Phase Definitions** and click **New** to create customized phases for your organization. You can define their phases with the following information:

- Names for the phases such as Phases 1, 2, and 3 or red, yellow, and green (**Name**)
- The location the phase applies to (**Location**)
- The maximum daily occupancy percentage (**Max daily occupancy percent**)
- A description of the phase

You can determine your own criteria for what constitutes a check-in. Navigate to **Safe Workplace Dashboard** > **Reopening Check-In Audience** and click **New** to open a new record. Administrators can use the condition builder to define the tables and fields to add to a check-in and mark the Check-In Audience as active.

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Review COVID-19 vaccination metrics in the Safe Workplace Dashboard

Organizations with the Vaccination Status application can use data from the application and public data from the COVID-19 Global Health Data Set to review COVID-19 vaccination metrics across the United States and worldwide. Organizations can then compare their vaccination numbers to public numbers to gain a better understanding of their organization's vaccination efforts.

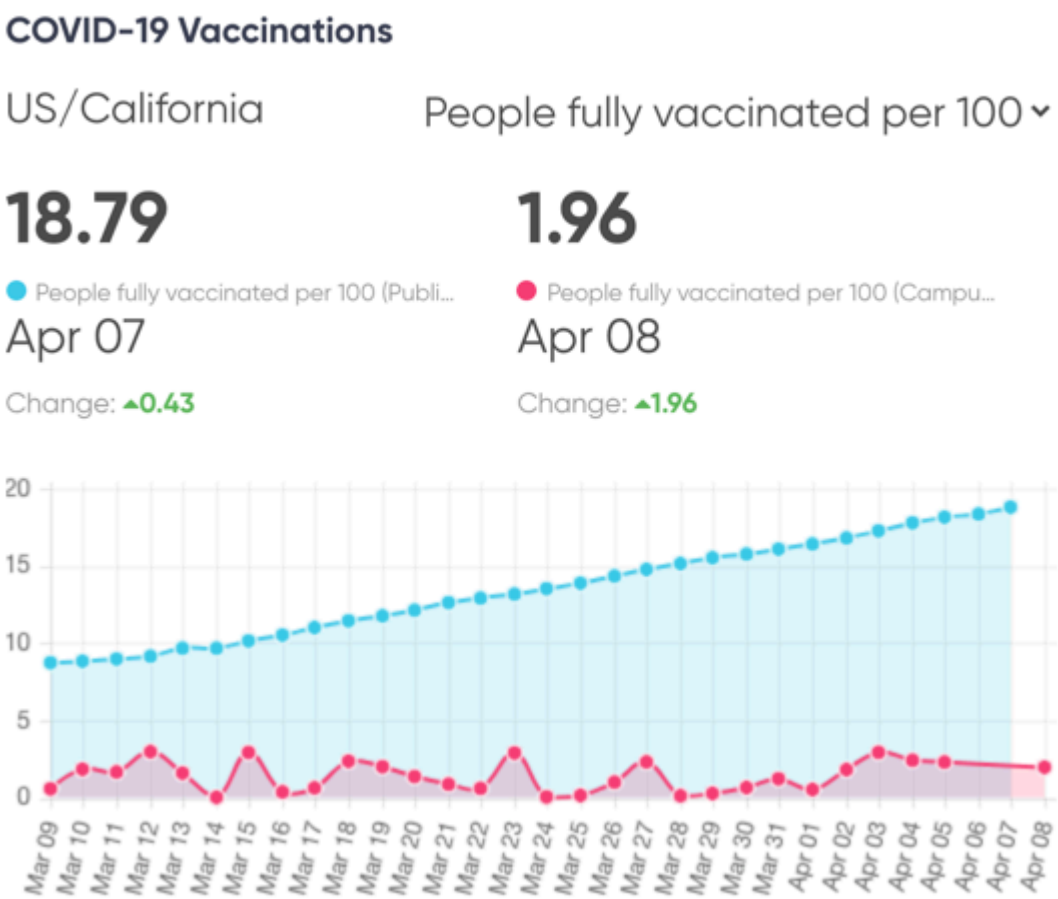
This data is made available through the Safe Workplace Dashboard Vaccination Widget. The following metrics are available in the Safe Workplace Dashboard Vaccination Widget:

- The number of people fully vaccinated per 100
- The number of people vaccinated per 100
- The number of total vaccination doses per 100

Users with the admin role can add the Safe Workplace Dashboard Vaccination Widget to the Safe Workplace Dashboard Site View. For more information, see Add a vaccination widget to the Safe Workplace Dashboard.

Important: Users must have the sn_imt_dashboard.user and sn_imt_vaccine.vaccine_profile_reader roles to see any vaccination data in the dashboard.

Safe Workplace Dashboard Vaccination Widget



Vaccination data is pulled from the last 30 days and includes campus data based on the vaccine responses per location from the **Vaccination Status** application. The widget is scheduled to update automatically once the COVID-19 Global Health Data Set and **Vaccination Status** are

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installed. Updates are performed daily at midnight (00:00) instance time, regardless of the number of campuses in your organization and their geographic location.

Note: If data is unavailable or missing, the widget will not display data for that day (even if available) until the next day the scheduled jobs run successfully.

Add a vaccination widget to the Safe Workplace Dashboard

As an admin, add the Safe Workplace Dashboard Vaccination widget to the Safe Workplace Dashboard Site View portal page.

Before you begin

To successfully add the Safe Workplace Dashboard Vaccination widget and populate it with data, note the following requirements:

- The Vaccination Status application must be installed and configured. For more information, see Vaccination Status.
- The Safe Workplace Dashboard application must be installed and configured. For more information, see Safe Workplace Dashboard.

Role required: admin

Procedure

1. Navigate to **All** > **Safe Workplace Dashboard** > **Safe Workplace Dashboard.**
2. Navigate to a campus and select **View details**
3. Press Control+right-click on the widget instance and select **Page in Designer**.
4. Search for `SWD Vaccination Graph`.
5. Select **SWD Vaccination Graph** and drag it onto the page.
6. Change the chart type to **Line**.
   a. Click the edit icon.
   b. Change the **Chart Type** to **Line**.
   c. Click **Save**.

Result

The Safe Workplace Dashboard Vaccination widget appears in the Safe Workplace Dashboard.

Contact Tracing

The ServiceNow® Contact Tracing application helps organizations reduce workplace transmission of infectious diseases, such as COVID-19, by identifying any on-site users who might have been in contact with an affected user. The user receives updates about the number of reported cases or symptoms in the location. A list of potentially exposed users is created from various data inputs, such as badge scans, Wi-Fi access logs, and daily contact logs.

Features

In Contact Tracing version 1.29.4. and above, the navigation path is not available in the Application search context menu (**All** > **Contact Tracing**) for Zebra and Devvio. The navigation path is available if you are using Contact Tracing 1.29.2 and later versions.

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- Identify on-site users who may have been in contact with a potentially infected user.
- Aggregate contact tracing information across workplace locations, work shifts and reservations, badge scans, Wi-Fi access logs, and self-reporting logs to enhance search criteria.
- Identify potential user interactions with a user using the Wi-Fi access data by correlating who connected to the same Wi-Fi network using laptops, mobile devices, or Bluetooth LE devices. You can get the Wi-Fi access data by manual import or through integration with Mist Systems or Cisco DNA Spaces.
- Get the contact tracing data of users who use handheld or wearable devices at the workplace. You can import the contact tracing report from Zebra MotionWorks Portal.
- Monitor risk scores of users who use wearable devices at the workplace. You can import risk score reports with Devvio integration.
- Create outreach cases and tasks for follow-up interviews with potentially impacted users.
- Assess the status of potentially exposed contacts and their next two levels of potential exposures from within a case using visualization.
- Maintain the data privacy of users, in the context of contact tracing by obtaining their consent.
- Use data retention settings to determine when the data collected for contact tracing is automatically deleted from the system.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Use with other ServiceNow® Safe Workplace suite and applications

The Contact Tracing application provides enhanced capabilities and additional features with other Safe Workplace suite applications.

- Emergency Outreach: Configure and send email and mobile notifications to users requesting them to submit daily contact logs and to get responses for privacy consents.
- Emergency Exposure Management: Run a diagnostic report on affected users to identify potentially exposed users who might have interacted with the affected user. You can use multiple data sources to broaden the coverage of finding potential exposure. Review tracing systems for data sources provided by Contact Tracing to see whether these tracing systems meet your business needs. You can modify these tracing systems or set up a new tracing system for your data source. For more information, see Set up a tracing system for an exposure data source.
- Safe Workplace Dashboard: View the trend of active cases and potentially exposed contacts over a given time period for a campus or location. You can also get alerts to determine when the number of active cases is higher than the threshold in a particular campus or location.
- Emergency Self Report: A case is created automatically for a user who is reported to be in quarantine if no active case exists for the user at the time of reporting.
- Employee Readiness Core:

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  - Automatically adds or updates a user's health and safety requirement status when a user is identified as a potentially exposed contact in a case. This up-to-date information helps you evaluate the readiness of your potentially exposed users to return to the workplace.
  - Automatically adds or updates a user's privacy consent requirement status when a user responds to the privacy consent request. This up-to-date information helps you ensure that your users acknowledge the privacy consent before entering the workplace to facilitate contact tracing as desired.
- Vaccination Status: Review a potentially exposed contact's vaccination status in the contact tracing visualization.

Domain separation for the Contact Tracing application

The Contact Tracing application supports domain separation at the Standard* level. For more information, see Domain separation and Contact Tracing. For a deeper understanding of the support levels, see Application support for domain separation.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Install Contact Tracing

You can install Contact Tracing if you have the admin role.

Before you begin

The following applications are also installed when you install the Contact Tracing application:

- ServiceNow® Emergency Exposure Management
- ServiceNow® Employee Readiness Core

You can also install and activate the following applications to use all Contact Tracing features:

- ServiceNow® Emergency Outreach
- ServiceNow® Emergency Self Report
- ServiceNow® Safe Workplace Dashboard

Role required: admin

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Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

The Contact Tracing application requires the ServiceNow® Performance Analytics - Premium application. If you're not already subscribed to Performance Analytics - Premium, you must install it before installing Contact Tracing.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Contact Tracing`.
3. Click **Install**.
4. In the Application installation dialog box, click **Install**.
5. When the installation is complete, click **Close**.
6. **Optional:** Control access to the application by creating a group and assigning roles to the group or individual users.

   (Optional) For more information, see Roles.

Components installed with Contact Tracing

Several types of components are installed with Contact Tracing, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Role title [name]	Description	Contains roles
Contact Tracing admin [sn_imt_tracing.admin]	Application-specific admin for Contact Tracing and has administrative privileges.	• sn_imt_tracing.case_manager • sn_imt_tracing.badge_admin • sn_imt_tracing.contact_tracing_user
Contact tracing user [sn_imt_tracing.contact_tracing_user]	Can submit daily contacts log and privacy consent preference, and access contact tracing cases when added to the case watch list.	• sn_imt_checkin.dailylog_user • sn_imt_tracing.privacy_consent_user
Badge admin [sn_imt_tracing.badge_admin]	Can create, update, delete, and import badge data.	sn_imt_tracing.badge_manager

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Role title [name]	Description	Contains roles
Badge manager [sn_imt_tracing.badge_manager]	Can create, update, and import badge data.	• sn_imt_tracing.badge_reader • import_admin
Badge reader [sn_imt_tracing.badge_reader]	Can view badge access register data.	None
Case manager [sn_imt_tracing.case_manager]	Can create and manage outreach cases, run diagnostic requests to identify potentially exposed contacts. Can create, assign, and supervise tasks.	• sn_imt_diagnosis.diagnostics_admin • sn_imt_tracing.contact_tracer
Contact tracer [sn_imt_tracing.contact_tracer]	Can work on assigned case tasks to follow up on the health status of potentially exposed contacts, as per the predefined instructions.	• task_editor • survey_reader
Privacy consent user [sn_imt_tracing.privacy_consent_user]	Can submit and update the user policy consent for themselves.	None
Tracing user [sn_imt_tracing.dailylog_user]	Can fill in the daily contacts log to submit a list of users that they interacted with at the workplace.	None
Wi-Fi admin [sn_imt_tracing.wifi_admin]	Can create, update, delete, and	sn_imt_tracing.wifi_manager

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Role title [name]	Description	Contains roles
	import Wi-Fi access logs.	
Wi-Fi manager [sn_imt_tracing.wifi_manager]	Can create, update, and import Wi-Fi access Logs.	• import_admin • sn_imt_tracing.wifi_reader
Wi-Fi reader [sn_imt_tracing.wifi_reader]	Can view Wi-Fi access logs.	None
Wearable admin [sn_imt_tracing.wearable_admin]	Can create, update, delete, and import handheld or wearable devices access logs.	sn_imt_tracing.wearable_manager
Wearable manager [sn_imt_tracing.wearable_manager]	Can create, update, and import handheld or wearable devices access logs.	sn_imt_tracing.wearable_reader
Wearable reader [sn_imt_tracing.wearable_reader]	Can view handheld or wearable device access logs.	None

Scheduled jobs installed

Scheduled job	Description
Data Retention Job For Contact Tracing	Deletes contact tracing data after the retention period is over from the last updated date for the records related to contact tracing. The data includes badge swipes, Wi-Fi access register data, employee daily contact logs, daily log notes, and daily log acknowledgements, cases and associated case tasks, exposed contacts, diagnostic requests, diagnostic jobs, and workplace reservations. **Note:** The data retention policy doesn't apply to user privacy consent data.
Devvio Integration	Runs daily at 00:00:00 instance time and populates the Devvio Users Risk Report for organizations that use Devvio wearables and the DevvTrace platform.
Load Mist Systems	Runs daily at 00:00:00 and populates the sites for the organizations that use Wi-Fi logs from Mist Systems.

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Tables installed

Table	Description
Badge Access Register [sn_imt_tracing_badge_access_register]	Badge swipe records of all users.
Badge Access Register Stage [sn_imt_tracing_badge_access_register_stage]	The Import Set table for importing the badge access data from an Excel spreadsheet. When you load data from the Excel file into the application, the imported records are first saved in this import set table. After you run the transform, or execute the scheduled import script, the records are copied from this table to the Badge Access Register table.
Badge Reader [sn_imt_tracing_badge_reader]	User ID badge reading devices installed in a location.
User Badge [sn_imt_tracing_user_badge]	Users and their ID badge information.
Case [sn_imt_tracing_case]	Outreach cases for affected users to help minimize potential exposure to others.
Case Task [sn_imt_tracing_case_task]	Case tasks in outreach cases to follow up with the potentially exposed users to track health status.
Exposed Contacts [sn_imt_tracing_exposed_contact]	Potentially exposed users that might have interacted with a user who has been diagnosed with an infectious disease. The records in this table are stored when the case manager adds all impacted users to the case. Impacted users are identified through the diagnostic request using multiple data input.
Daily Contact Logs [sn_imt_tracing_daily_contact_log]	The names of users submitted using daily contact logs by another user.
Daily Log Acknowledgements [sn_imt_tracing_daily_log_acknowledgement]	Acknowledgement status to identify which users have responded to the notification to submit the daily contacts log.
Daily Log Notes [sn_imt_tracing_daily_log_note]	Names of users outside of the organization, such as visitors and contractors submitted using daily contact logs by another user.
Devvio Users Risk Report [sn_imt_tracing_devvio_users_risk_report]	Devvio users and their risk scores captured by Devvio wearables. The records in this table are imported from the DevvTrace platform and updated daily.

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Table	Description
Location Privacy Configuration [sn_imt_tracing_location_privacy_config]	Configuration for the location-based privacy policy, such as the privacy statement for a location and whether a particular location requires privacy consent.
Privacy Consent Template [sn_imt_tracing_privacy_consent_template]	Template to store the privacy statement for a location and is used in the location privacy configuration.
User Privacy Notice and Consents [sn_imt_tracing_user_privacy_consent]	Responses of users to the privacy consent.
Sites [sn_imt_tracing_site]	Sites in the building of your organization. Each floor is considered as a site. Each site can be further divided into zones. Each zone can have multiple Wi-Fi routers installed, called as Wi-Fi access points.
Wi-Fi Diagnostic Preferences [sn_imt_tracing_wifi_diagnostic_preference]	Type of Wi-Fi data used for contact tracing. For example, you might have real-time data for a location collected through the integration with a network system, such as Mist Systems. For other locations, you might manually upload data from a spreadsheet.
Wi-Fi Access Register [sn_imt_tracing_wifi_access_register]	Entry and exit time records of users who have connected to the office Wi-Fi access points or using the BLE enabled devices.
Wearable Access Register [sn_imt_tracing_wearable_access_register]	User interaction records captured using the proximity sensing data via their handheld or wearable devices when they are in the close proximity for more than the permissible time.

Setting up Contact Tracing

Configure system properties, scheduled jobs, script includes, Wi-Fi access log integration, and outreach notifications to aggregate contact tracing information for various data sources.

In Contact Tracing version 1.29.4. and above, the navigation path is not available in the application context menu search (**All** > **Contact Tracing**) for Zebra MotionWorks and Devvio. The following application modules are not available in the application search context menu Contact Tracing version 1.29.4:

- Handheld/Wearable Access Management (separator)
- Wearable Access Register
- Devvio (Separator)
- Devvio Users Risk Report
- Devvio Users Risk Report Import Set

The navigation path is available if you are using Contact Tracing 1.29.2 and later versions.

Get contact tracing information from various data sources such as workplace locations, work shifts and reservations, badge scans, Wi-Fi access logs, and self-reporting logs. Use these

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data sources to identify potentially exposed users by running the diagnostic request in the Emergency Exposure Management application.

Identifying potentially exposed users using tracing systems

A tracing system is configured for each contact tracing data source. Review the tracing systems for data sources to see whether these tracing systems meet your business needs. You can modify these tracing systems or set up a new tracing system for your data source.

For more information, see Set up a tracing system for an exposure data source.

Set up Contact Tracing properties

Configure system properties to adjust how contact tracing data is used.

Before you begin

Role required: admin

About this task

Employers remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Employers' specific requirements.

Note: For system properties associated with tracing systems, see System properties for tracing systems in Emergency Exposure Management.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Administration** > **Properties**.
2. Set the following property values.

Properties for Contact Tracing

Property	Description
sn_imt_tracing.data_retention_period	Number of days after which the data collected for contact tracing is automatically deleted from the system. The retention period is calculated from the last updated date of the data. The retention policy applies to the following contact tracing data: ○ Badge swipe data. ○ User daily contact logs, daily log notes, and daily log acknowledgment data. ○ All closed and canceled cases and associated potentially exposed contacts, case tasks, diagnostic requests and the underlying source data, and diagnostic events.

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Property	Description
	Note: A survey associated with cases eligible for deletion after the retention period is not deleted because surveys have their own retention period. For more information, see Clean up assessment data. ○ Wi-Fi access register data The default value is 90.
sn_imt_tracing.auto_create_case_tasks	Enables or disables automatic creation of a case task when a case manager adds a potentially exposed contact to a contact tracing case. If the property value is set to *Yes*, the base system workflow, **Create case tasks for exposed contacts**, triggers the creation of a case task when a potentially exposed contact is added to a case. The default value is *Yes*.

3. Click **Save**.

Domain separation and Contact Tracing

Domain separation is supported for the ServiceNow® Contact Tracing application. The application helps organizations reduce workplace transmission of infectious diseases, such as COVID-19, by identifying anyone on site who might have been in contact with an affected person.

Support level: Standard*

The support level is Standard but has some exceptions or special conditions.

- Includes all aspects of **Basic** level support.
- Business logic: The service provider (SP) creates or modifies processes per customer. The use cases reflect proper use of the application by multiple SP customers in a single instance.
- The instance owner must be able to configure minimum viable product (MVP) business logic and data parameters. This configuration is done per tenant, as expected for the specific application.

Sample use case: An admin must be able to make comments required when a record closes for one tenant, but not for another.

For more information on support levels, see Application support for domain separation.

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Domain separation and Contact Tracing Overview

Service providers need to be able to manage multiple customers in a single instance to deliver their services via Contact Tracing in the Safe Workplace suite. Beginning with the Paris release, scheduled jobs introduced support for domain separation at the Standard level.

Admins must install the Domain separation plugin before working with the Contact Tracing tables.

See Domain separation and Safe Workplace suite to learn how to set up Contact Tracing with domain separation.

Related topics

Domain separation for service providers

Modify the scheduled data import job

As an administrator, review and modify the scheduled data import jobs used for importing badge access and Wi-Fi access data from an Excel file into the Contact Tracing application.

Before you begin
Role required: admin

About this task
The following scheduled jobs are installed with the Contact Tracing application:

- *Badge Access Register Scheduled Import*
- *Wi-Fi Access Register Scheduled Import*

These jobs are set for manual execution to import the badge access data or Wi-Fi access data from an Excel file. You can modify the settings based on when and how you want to import the data.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Administration** > **Data Import Jobs**.
2. Open a Scheduled Import record.
3. Review and modify the settings as required.
   For more information on configuring a scheduled data import, see Schedule a data import.
4. Click **Update**.

Related topics

Importing data using import sets

Configure the time zone setting for badge and daily log data

Add a script include in the Global scope to consider the affected user's time zone when you run a diagnostic request using the badge reader or user daily log data source.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System UI** > **Script Includes**.
2. Click **New**.

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3. In the **Name** field, enter `TimeZoneUtils`.
4. From the Accessible from list, select **All application scopes**.
5. Copy the following script into the **Script** field.

```
var TimeZoneUtils = Class.create();
TimeZoneUtils.prototype = {
 initialize: function() {
 },
 getTimeZone: function(timeZoneString) {
  return
 Packages.java.util.TimeZone.getTimeZone(timeZoneString);
 },
 getTimeZoneOffSet: function(timeZoneString, gdt) {
  var timeZoneObj = this.getTimeZone(timeZoneString);
  var dateTime = new GlideDateTime();
  if (gdt) {
   dateTime.setValue(gdt);
  }
  dateTime.setTZ(timeZoneObj);
  return dateTime.getTZOffset();
 },
 getBoundaryDates: function(timeZoneString, offset, dateTime) {
  var tz = this.getTimeZone(timeZoneString);
  var gd = new GlideDateTime();
  gd.setValue(dateTime);
  gd.add(offset);
  var startTime = '00:00:00';
  var endTime = '23:59:59';
  var actualDate = new GlideDate();
  actualDate.setValue(gd.getValue());
  var startDateTime = new GlideDateTime();
  startDateTime.setTZ(tz);
  startDateTime.setDisplayValueInternal(actualDate + ' ' +
 startTime);
  var endDateTime = new GlideDateTime();
  endDateTime.setTZ(tz);
  endDateTime.setDisplayValueInternal(actualDate + ' ' +
 endTime);
  return {
   startDateTime: startDateTime,
   endDateTime: endDateTime
  };
 },
 type: 'TimeZoneUtils'
};
```

6. Click **Submit**.

Result

The script is used when you run the diagnostic request using the badge reader or user daily log data source. These data sources identify the potentially exposed users who might have come in contact with an affected user. The script considers the affected user's time zone while calculating the date and time from the badge swipe data or daily log data.

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Configure an email notification for the daily contact log

Configure a custom email notification to use with Emergency Outreach notifications so you can request that users submit a list of other users they came in contact with throughout the workday.

Before you begin

Review the existing **Employee Daily Log Alert** and **Daily Contact Log Notification** email notifications to familiarize yourself with the base scripts and settings.

Role required: admin

About this task

When you configure an email notification for use as a daily contact log, you are creating a customized email notification for contact tracing purposes. The **Employee Daily Log Alert** and **Daily Contact Log Notification** are email notifications you can review for a better understanding on how notifications similar to the one you might create are configured.

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Click **New**.
3. **Optional:** In the **Name** field, enter a descriptive name for the notification.
4. In the **Table** field, select the Daily Log Acknowledgements [sn_imt_tracing_daily_log_acknowledgement] table.
5. On the **When to send** tab, set the conditions.
   - Enter conditions in the condition builder to define when users are sent the email notification.
   - Copy the following example script in the **Advanced condition** field and make these modifications.
     - Give the variable a different name, for example, *employeeCheckInAcmeSysId*.
     - Enter the new notification sys_id as the value.
     - Enter the variable name that you declared at the end of the second line.

   Example
   Example Advanced condition script:

```
var employeeCheckInAcmeSysId = '<replace with this notification
 sys_id';
answer = current.employee_check_in.notification ==
 employeeCheckInAcmeSysId
```

6. On the **Who will receive** tab, select from **Users** and **Groups** to determine who will receive the notification.
7. Complete the remaining information on the **What it will contain** tab.

What it will contain tab

Field	Action
Email template	Select the email template used to determine any pre-configured content within the subject line and message body.
Subject	Create the subject line that users see when they receive the email.

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Field	Action
Message HTML	In the **Message HTML** field, add and customize the text or source code of the message to meet your organization's needs. **Note:** While entering the email content in the **Message HTML** field, make sure that you include the link to the Daily Contact Log form.

8. Click **Submit**.
9. In the Notifications list, open the notification that you added and click **Preview Notification**.
10. Review the notification and make any changes required.
11. Click **Update**.

Result

You created a custom email notification for use as daily contact log with Emergency Outreach notifications. When you modify or create an Emergency Outreach notification, you can select this notification for the Daily Contact Log or custom outreaches.

What to do next

To use this email notification for as your daily contact log, see Configure an Emergency Outreach notification for the daily contact log.

Configure an Emergency Outreach notification for the daily contact log

As an administrator, create or configure the Emergency Outreach notification to send email and mobile push notifications to employees to ask them to submit a list of co-workers whom they have interacted with on a given day.

Before you begin

Ensure that you have the Emergency Outreach application installed. For details, see Install Emergency Outreach.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Contact Tracing** > **Administration** > **Daily Log Alerts**.
2. Either edit the existing notification by opening the **Daily Contact Log** outreach record or click **New** to create one.
3. Enter the outreach notification name in the **Event name** field.
4. Select the **Employee Daily Contact Log Alert** check box.
   The **Daily Contact Log** option is selected in the **Response mode** field on the **Content configuration** tab. You cannot change this value if the **Employee Daily Contact Log Alert** check box is selected.
5. On the **Select targeted audience** tab, select the target audience for the notification, and click **Save**.

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- You can choose from user lists, groups, departments, locations, or other search filters such as building, cost center, or country code.
- If you have the ServiceNow® Employee Health Screening application installed, the **Use Employee Health Screen Data** option is available. Select this check box to include all employees cleared in the health screening to enter the premises. For more information, see Employee Health Screening.
- If you have the ServiceNow® Workplace Core application installed, the **User Workplace Reservation Data** option is available. Select this check box to include all employees with confirmed or approved reservations for that day. For more information, see Workplace Core.

6. On the **Content configuration** tab, select a notification in the **Notification** field, and choose how to send the notification.
   - To send the notification by email, select the **Email notification** check box and enter the email subject and body.
   - To send a mobile push notification, select the **Now Mobile Push notification** check box and enter or modify the push message and a detailed push message.

     This option is available only if the ServiceNow NowMobile App Screens and Applet Launcher (com.glide.mobile-employee) plugin is activated.

     Push notifications use the ServiceNow Request Application notification device. When users register their mobile application to an instance, this notification device is automatically created in their notification preferences. Ensure that this device is active for the users that you want to receive the push notification.
   - To use a custom notification channel, click the Additional Channels related list, click **Edit**, and move the channel to the Additional Channels List. Click **Save**.

     Make sure that the **Email notification** and **Now Mobile Push notification** check boxes are not selected or notifications will also be sent through those channels.
7. Click **Save**.
   The target audience and content configuration changes are saved.
8. Click **Schedule**.
9. In the Scheduled Script pop-up window, configure a scheduled job to the notification.
   For more information, see Configure a scheduled job.
10. Click **Submit**.
    A script is added to the scheduled job. The job is associated with the outreach notification.

Result

An outreach notification with a scheduled job is created. The job sends notifications to the target audience per the set schedule.

What to do next

A user with the sn_imt_checkin.checkin_admin role can send the Outreach notification on demand.

A user with the admin or sn_imt_checkin.checkin_admin role can stop the scheduled job to send the notifications automatically. To do so, click **Schedule** and in the dialog box, clear the **Active** check box, and then click **Update**.

Configure Contact Tracing data retention settings

Configure the data retention settings for the data collected for contact tracing such as badge swipe data, employee daily contact logs, and cases.

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Before you begin
Role required: admin

About this task
Employers remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Employers' specific requirements.

A system property and scheduled jobs control the data retention policy for contact tracing data.

- The *sn_imt_tracing.data_retention_period* system property determines the number of days the contact tracing data will be available in the system before it is deleted automatically.
- The *Data Retention Job For Contact Tracing* scheduled job checks for records that have an updated date that is past the defined retention period, and deletes them.

  The data retention policy applies to the following contact tracing data:

  Badge swipe data

  Table impacted: Badge Access Register [sn_imt_tracing_badge_access_register]

  Closed and canceled cases and associated records

  Tables impacted: Case [sn_imt_tracing_case], Case Task [sn_imt_tracing_case_task], Exposed Contacts [sn_imt_tracing_exposed_contact], Diagnostic Request [sn_imt_diagnosis_diagnostic_request], Diagnostics Events [sn_imt_diagnosis_diagnostics_event], and Potential Workplace Exposure [sn_imt_diagnosis_potential_workplace_exposure]

  The Diagnostic Request and Diagnostics Events tables are installed with the Emergency Exposure Management application.

  Note: A survey associated with cases that are eligible for deletion after the retention period is not deleted because surveys have their own retention period. For more information, see Clean up assessment data.

  Employee daily contact logs

  Tables impacted: Daily Contact Logs [sn_imt_tracing_daily_contact_log], Daily Log Acknowledgements [sn_imt_tracing_daily_log_acknowledgement], and Daily Log Notes [sn_imt_tracing_daily_log_note]

  Wi-Fi access data

  Tables impacted: WiFi Access Register [sn_imt_tracing_wifi_access_register]and Wi-Fi Access Register Job [sn_imt_tracing_wifi_access_register_job]

- The *Purge Contact Tracing Deleted Records (Data Retention)* scheduled job purges all deleted records of contact tracing from the Audit Deleted Record [sys_audit_delete] table. All deleted records with an updated date past the defined retention period are purged.

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Procedure

1. Set the period for which you want to keep the contact tracing data.
   a. Navigate to **Contact Tracing** > **Administration** > **Properties**.
   b. Enter a value in the **Contact Tracing data retention period (in days)** property.
   The default value is 90 days.
   c. Click **Save**.
2. Configure the scheduled job to determine when the job runs to check for and delete the contact tracing data.
   a. Navigate to **System Definition** > **Scheduled Jobs**.
   b. Open the *Data Retention Job For Contact Tracing* scheduled job.
   c. Configure the job settings and click **Save**.
   For more information, see Configure a scheduled job.
3. Download, import, and configure the *Purge Contact Tracing Deleted Records (Data Retention)* schedule job in the Global scope to purge deleted records.
   a. Download the Purge Contact Tracing Deleted Records (Data Retention) XML file from the Contact Tracing application page on the ServiceNow® Store.
   b. Navigate to **System Definition** > **Scheduled Jobs**.
   c. Import the downloaded XML file into the Scheduled Job [sysauto] table.
   For more information on importing, see Import a record from the template.
   d. Search and open the *Purge Contact Tracing Deleted Records (Data Retention)* record.
   e. Select **Active** to activate the job.
   f. In the **Run** field, set the schedule for the job to run.
   g. Click **Update**.

Create a requirement for potentially exposed contacts to return to work

Create a requirement for potentially exposed employees to meet to verify that they are eligible to return to work.

Before you begin

- Health and safety requirements are available in the ServiceNow® Employee Readiness Core application, which must be installed.
- Health and safety requirements are built with ServiceNow® Workflow Studio, so make sure you're familiar with the Flow Designer basics.

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Role required: sn_imt_core.admin

About this task

Define health and safety requirements for employees to return to work. Employees should not be in any potentially exposed contacts investigation of a case. If they are part of an active case investigation, they should meet the requirement of a clear status to be eligible to return to workplace. For more information, see Follow up with potentially exposed contacts.

Note:

This procedure describes how to create a requirement using the base system Exposed Contacts Requirement as an example.

Procedure

1. In Workflow Studio, create an action to add or update the requirement status for an employee added to the potentially exposed contacts list of a case.

   a. Create an action and save it in the Employee Readiness Core application.

   b. In the Inputs section of the Action Outline, create an input for the type of record to use to check whether the employee meets the requirement.

   For example, to meet the Exposed Contacts Requirement, employees must have a record in the Exposed Contacts table [sn_imt_tracing_exposed_contact].

Label	Name	Type	Mandatory
Exposed Contact	exposed_contact	Reference.Exposed Contacts [sn_imt_tracing_exposed_contact]	Yes

   c. Add a **Script Step** to the Action Outline.

   d. In the **Required Runtime** field, select **Instance**.

   e. Create an input variable using the input that you created for the action as the value.

   This variable enables you to use the input for the action in a script.

Input Variables

Name	Value
exposed_contact	**Exposed Contact** input that you created in the Inputs section.

   f. In the **Script** field, add a script to define the conditions when an employee's requirement status is `cleared` or `not_cleared`.

   For the Exposed Contacts Requirement, the requirement is `not cleared` for an employee if the health status in any exposed contact records for the employee is `under_investigation` or `infected`, and `cleared` for any other response.

```
(function execute(inputs, outputs) {
```

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```
 outputs.requirement_status = 'cleared';
 if (!inputs.exposed_contact.is_primary_exposed_contact) {
   var now_GR = new
GlideRecord('sn_imt_tracing_exposed_contact');
   now_GR.addQuery('exposure_case.active',true);
   now_GR.addQuery('is_primary_exposed_contact',true);
   now_GR.addQuery('user',inputs.exposed_contact.user);
   now_GR.setLimit(1);
   now_GR.query();
   if (now_GR.next()) {
    if(now_GR.status == 'under_investigation' ||
now_GR.status == 'infected'){
     outputs.requirement_status = 'not_cleared';
   }else{
     outputs.requirement_status = 'cleared';
   }
   }else{
     var gr2 = new
GlideRecord('sn_imt_tracing_exposed_contact');
     gr2.addQuery('exposure_case.active',true);
     gr2.addQuery('user',inputs.exposed_contact.user);
     gr2.query();
     while(gr2.next()){
       if(gr2.status == 'under_investigation' || gr2.status
== 'infected'){
     outputs.requirement_status = 'not_cleared';
           break;
       }
     }
   }
 }else{
  if(inputs.exposed_contact.status == 'under_investigation'
|| inputs.exposed_contact.status == 'infected'){
    outputs.requirement_status = 'not_cleared';
  }else{
    outputs.requirement_status = 'cleared';
  }
 }
})(inputs, outputs);
```

g. Create an output variable for the requirement status.

This defines the *requirement_status* variable that you used in the script.

Output Variables

Label	Name	Type	Mandatory	Choice (Advanced options)
requirement_status	requirement_status	Choice	Yes	Dropdown with --None--

h. In the Outputs section of the Action Outline, create an output for the requirement status.

Creating this output enables you to use the *requirement_status* output variable from the script as an output returned by the action.

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Output Variables

Label	Name	Type	Mandatory	Choice (Advanced options)
Requirement status	requirement_status	Choice	No	Dropdown with --None--

i. Assign the *`requirement_status`* value to the output.

Output Variables

Label	Value
Requirement Status	*`requirement_status`* output variable from the script step.

The action returns the value of the *`requirement_status`* for the employee (`cleared` or `not_cleared`) as an output.

j. Click **Publish**.

2. Create an exposed contacts requirement.

a. Navigate to **Employee Health and Safety Status** > **Health and Safety Requirements**.

b. Click **New**.

c. On the form, fill in the fields.

The Include previous applicable records section defines a set of records that have already been created but should still trigger the requirement flow. Including previous records ensures that employees who complete the requirement before it is activated have their requirement status set to Not Cleared.

Health and Safety Requirement form

Field	Description
Name	Unique name for the requirement. For example, `Exposed Contacts Requirement`.
Requirement flow	Flow to update the requirement status for a potentially exposed employee. Leave this field empty. You will return to the requirement record and fill in this field after you create the flow.
Active	This field is read-only. Once you update all fields for the requirement, you can use the **Activate** button to activate the requirement.
Default status	The default status assigned to employees who are not in the potentially exposed contacts list to meet the health and safety requirement. The options are Cleared and Not Cleared.

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Field	Description
	For example, employees who don't have an exposed contact record are assigned a default status of Not Cleared for the Exposed Contacts Requirement.
Use duration	Option for setting a time limit for the validity of the requirement status. Do not select this field because the employee's status is automatically updated when the status of the exposed contact task for the employee is updated.
Include previous applicable records	
Table	Table to consult for previously created records that will trigger the requirement flow. For example, the Exposed Contacts Requirement uses the Exposed Contacts table [sn_imt_tracing_exposed_contact].
Condition	Conditions to filter the records from the table that will trigger the flow.

d. Click **Submit**.

3. In Workflow Studio, create a flow to update the requirement status for an employee.

a. Create a flow and save it in the Employee Readiness Core application.

b. Add a trigger so that the flow runs whenever the type of record that you're using to check the requirement status is created or updated.

For example, for the Exposed Contacts Requirement, the flow runs whenever an exposed contacts record in a case is created or updated.

Trigger

Trigger	Table	Condition	Run Trigger
Created or Updated	Exposed Contacts [sn_imt_tracing_exposed_contact]	None.	Once

c. Add the action that you created to the flow, with the record from the trigger as the input. For example, for the Exposed Contacts input, add the Exposed Contacts record that was created or updated in the trigger event.

d. Add the Update User Requirement action provided in Employee Readiness Core to the flow.

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Update User Requirement inputs

User [User]	Health and safety requirement [Health and Safety Requirement]	Requirement status	Trigger datetime
Employee or **User** field from the trigger record. For example, the **User** field from the Exposed Contacts record.	Health and safety requirement you created for the potentially exposed contacts.	`requirement_status` returned by the action you created.	Select **Date/Time**.

e. Click **Activate**.

4. Complete the health and safety requirement.
   a. Navigate to **Employee Health and Safety Status** > **Health and Safety Requirements**.
   b. Click the requirement.
   c. In the **Requirement flow** field, add the flow that you created to update the requirement status for employees.
   d. Click **Update**.

What to do next

You must activate the requirement before you can track whether employees have fulfilled it. For instructions, see Activate a health and safety requirement.

Create a requirement for employees to acknowledge the privacy consent request

Create a requirement for your employees to respond to the privacy consent request before entering the workplace to facilitate the use of their data for contact tracing.

Before you begin

- Requirements are available in the ServiceNow® Employee Readiness Core application, which must be installed.
- Privacy Consent requirement is built with ServiceNow® Workflow Studio, so make sure you're familiar with the Flow Designer basics.

Role required: sn_imt_core.admin

About this task

Define the privacy consent requirement for employees to return to work. Employees who agree to the use of their data for contact tracing fulfill the privacy consent requirement and are eligible to return to the workplace. Employees who disagree do not fulfill the privacy consent requirement and are not eligible to return to the workplace. For more information, see Respond to a request for privacy consent in Contact Tracing.

Note: This procedure describes how to create a requirement using the base system Privacy Consent Requirement as an example.

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Procedure

1. In Workflow Studio, create an action to add or update the requirement status for an employee who responds to the privacy consent request.

   a. Create an action and save it in the Employee Readiness Core application.

   b. In the Inputs section of the Action Outline, create an input for the type of record to use to check whether the employee meets the requirement.

Label	Name	Type	Mandatory
preference	preference	String	Yes

   c. Add a **Script Step** to the Action Outline.

   d. In the **Required Runtime** field, select **Instance**.

   e. Create an input variable using the input that you created for the action as the value.

   This variable enables you to use the input for the action in a script.

Input Variables

Name	Value
preference	**preference** input that you created in the Inputs section.

   f. In the **Script** field, add a script to define the conditions when an employee's requirement status is `cleared` or `not_cleared`.

   For the Privacy Consent Requirement, the requirement is `not_cleared` for an employee if the employee disagrees to the privacy consent request, and `cleared` if the employee agrees.

```
(function execute(inputs, outputs) {
    if (inputs.preferences == "agree") {
        outputs.requirement_status = "cleared";
    } else if (inputs.preferences == "withdraw_consent") {
        outputs.requirement_status = "not_cleared";
    }

})(inputs, outputs);
```

   g. Create an output variable for the requirement status.

   This output variable defines the *`requirement_status`* variable that you used in the script.

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Output Variables

Label	Name	Type	Mandatory	Choice (Advanced options)
requirement_status	requirement_status	Choice	Yes	Dropdown with --None--

h. In the Outputs section of the Action Outline, create an output for the requirement status.

Creating this output enables you to use the *requirement_status* output variable from the script as an output returned by the action.

Output Variables

Label	Name	Type	Mandatory	Choice (Advanced options)
Requirement status	requirement_status	Choice	No	Dropdown with --None--

i. Assign the *requirement_status* value to the output.

Output Variables

Label	Value
Requirement Status	*requirement_status* output variable from the script step.

The action returns the value of the *requirement_status* for the employee (`cleared` or `not_cleared`) as an output.

j. Click **Publish**.

2. Create a privacy consent requirement.

a. Navigate to **Employee Health and Safety Status** > **Health and Safety Requirements**.

b. Click **New**.

c. On the form, fill in the fields.

The Include previous applicable records section defines a set of records that have already been created but should still trigger the requirement flow. Including previous records ensures that employees who complete the requirement before it is activated have their requirement status set to Cleared.

Health and Safety Requirement form

Field	Description
Name	Unique name for the requirement.

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Field	Description
Requirement flow	Flow to update the requirement status for an employee. Leave this field empty. You will return to the requirement record and fill in this field after you create the flow.
Active	This field is read-only. Once you update all fields for the requirement, you can use the **Activate** button to activate the requirement.
Default status	The default status assigned to employees who don't have any activity towards completing the requirement. The options are Cleared and Not Cleared. For example, employees who don't have a record in the User Privacy Notice and Consents [sn_imt_tracing_user_privacy_consent] table are assigned a default status of Not Cleared for the Privacy Consent Requirement.
Use duration	Option for setting a time limit for the validity of the requirement status. Do not select this field because the employee's status is automatically updated when the employee responds to the privacy consent request.
Include previous applicable records	
Table	Table to consult for previously created records that will trigger the requirement flow. For example, the Privacy Consent Requirement uses the User Privacy Notice and Consents table.
Condition	Conditions to filter the records from the table that will trigger the flow.

d. Click **Submit**.

3. In Workflow Studio, create a flow to update the requirement status for an employee.

a. Create a flow and save it in the Employee Readiness Core application.

b. Add a trigger so that the flow runs whenever the type of record that you're using to check that the requirement status is created or updated.

For example, for the Privacy Consent Requirement, the flow runs whenever a user privacy notice and consent record is created or updated.

Trigger

Trigger	Table	Condition	Run Trigger
Created or Updated	User Privacy Notice and Consents [sn_imt_tracing_user_privacy_consent]	[Preferences] [changes to] [I Agree] OR [Preferences]	Only if not currently running

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Trigger	Table	Condition	Run Trigger
		[changes to] [Withdraw Consent]	

c. Add the action that you created to the flow, with the record from the trigger as the input. For example, for the preference input, add the User Privacy Notice and Consent record that was created or updated in the trigger event.

d. Add the Update User Requirement action provided in Employee Readiness Core to the flow.

Update User Requirement inputs

User [User]	Health and safety requirement [Health and Safety Requirement]	Requirement status	Trigger datetime
User field from the trigger record. For example, the **User** field from the User Privacy Notice and Consent record.	Health and safety requirement you created for the privacy consent.	`requirement_status` returned by the action you created.	Leave the field blank.

e. Click **Activate**.

4. Complete the health and safety requirement.
   a. Navigate to **Employee Health and Safety Status** > **Health and Safety Requirements**.
   b. Open the Privacy Consent Requirement record.
   c. In the **Requirement flow** field, add the flow that you created to update the requirement status for employees.
   d. Click **Update**.

What to do next

You must activate the requirement before you can track whether employees have fulfilled it. For instructions, see Activate a health and safety requirement.

Configure an email notification for an exposure notice

Configure an email notification to use in the Emergency Outreach to send to potentially exposed contacts in an exposure case to notify them of potential exposure from an affected employee.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Review the existing **Notify Exposed Contact** email notification to familiarize yourself with the script and other settings.
3. Click **New**.
4. In the **Table** field, select the Exposure Notice [sn_imt_tracing_exposure_notice] table.

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5. On the **When to send** tab, complete the following settings.

   a. In the **Send when** field, select **Record inserted or updated**.

   b. Set the **Conditions** criteria to **[User.Active][is][true]** and **[Notification count][changes]**.

   c. In the **Advanced condition** field, enter the following code:

   ```
   var exposedContactNotificationSysId = '<your-sys_id>';
   answer = current.outreach.notification ==
    exposedContactNotificationSysId;
   ```

   Replace the <your-sys_id> variable with the sys_id notification that you're adding by right-clicking in the header, selecting the **Copy sys_id** option, and pasting the sys_id into the code line.

6. On the **Who will receive** tab, open **Users/Groups in fields** and select **Assigned to**.
7. Complete the remaining information on the **What it will contain** tab.
8. Click **Submit**.
9. In the Notifications list, open the notification that you added and click **Preview Notification**.
10. Review the notification and make any changes required.
11. Click **Update**.

What to do next

Configure an Emergency Outreach notification for the exposure notice.

Configure an Emergency Outreach notification for the exposure notice

Configure an Emergency Outreach notification to send email and mobile push notifications to potentially exposed employees in an exposure case to notify them of a potential exposure from an affected employee.

Before you begin

Ensure that you have the Emergency Outreach application installed. For details, see Install Emergency Outreach.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin or admin

About this task

Review the existing **Notify Exposed Contact** outreach notification to familiarize yourself with the configuration.

Procedure

1. Navigate to **All** > **Emergency Outreach** > **View Outreaches**.
2. Click **New**.
3. Enter the outreach notification name in the **Event name** field.
4. On the **Content configuration** tab, select **Exposure Notice** in the **Response mode** field.
5. **Optional:** Review and edit the introductory message by modifying the subject and body in the **Email subject** and **Email body** fields respectively.

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6. Specify how to send the outreach notification.

Option	Steps
Send an email notification	Select the **Email** check box.
Select a different notification	Click the lookup icon () and select an email notification configured for the exposure notice outreach.
Send a mobile push notification	**a.** Select the **Now Mobile Push notification** check box. The check box is active if you have the ServiceNow Now Mobile App Screens and Applet Launcher [com.glide.mobile-employee] activated. The push notification content appears when the check box is active. **b.** Modify the text in the **Push message** and **Detailed Push Message** fields. Push notifications use the ServiceNow Request Application notification device. When you register the mobile application to an instance, this notification device is automatically created in the user's notification preferences. Make sure that this device is active for the users that you want to receive the push notification.
Use a custom notification channel	**a.** Click the Additional Channels related list, click **Edit**, and move the channel to the Additional Channels List. **b.** Click **Save**. If the **Email notification** and **Now Mobile Push notification** check boxes are selected, all three notifications are sent. To use only the custom notification channel, clear these two check boxes.

7. Click **Submit**.
   The content configuration settings are saved.

Result
An exposure notice outreach notification is created. These exposure notice outreach notifications are available for selection when a case manager wants to send notifications to the potentially exposed contacts in a case.

What to do next
A case manager can send the outreach notification to the potentially exposed contacts in a case.

Configure contact tracing visualization to show vaccination status

Configure Contact Tracing so case managers can view the vaccination status of potentially exposed contacts in the contact tracing visualization.

Before you begin
The Vaccination Status application must be installed and configured. For more information, see Vaccination Status.

Role required: admin

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Procedure

1. Navigate to **All** > **Contact Tracing** > **Properties**.
2. Set the *sn_imt_tracing.show_contact_vaccination_status* property to **Yes**.
   This step enables vaccination statuses to display on the contact tracing visualization.
3. Click **Save**.
4. Assign the Vaccination Status application sn_imt_vaccine.vaccine_profile_reader role to each case manager.
   The vaccination status and the **Vaccinated** column in **Exposed Contacts** are hidden until you have this role.

   Note: If the *sn_imt_tracing.show_contact_vaccination_status* property is set to **No**, case managers with the sn_imt_vaccine.vaccine_profile_reader role can see the **Vaccinated** column, but the column is empty.

Result

Case managers can see the vaccination status of users on the case form in both the contact tracing visualization and the **Exposed Contacts** list. For more information, see Working on a case through contact tracing visualization.

Trouble?

If a case manager can't see vaccination statuses even though the *sn_imt_tracing.show_contact_vaccination_status* property is set to **Yes**, confirm that the case manager has the sn_imt_vaccine.vaccine_profile_reader role.

Setting up data privacy consent settings for Contact Tracing

As an admin, you can configure privacy consent templates, location-based privacy configurations, email notifications, and outreach notifications for sending privacy consent alerts in Contact Tracing.

In Contact Tracing, you can configure and send privacy consent notifications that request employees to consent to having their data used for contact tracing purposes.

User privacy regulations vary from country to country. For some countries, consent by employees to use their data is not required but for others it is a must. You can set different privacy policies for different locations and organization setups. Some organizations maintain a separate privacy policy for each location while others maintain a single privacy policy for all locations.

Modify or add a privacy consent template for Contact Tracing

Modify or add a privacy consent template to be used in the location privacy configuration.

Before you begin

Role required: sn_imt_tracing.admin

Procedure

1. **Contact Tracing** > **Privacy** > **Privacy Consent Templates**.
2. Open a **Default Template** record to modify it or click **New** to create one.
3. Enter a unique name of the template in the **Name** field.
4. Enter the privacy policy statement in the **Privacy statement** field.
   If the privacy policy is different for different locations, create one template for each location and specify the policy statement.

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If your organization has a single policy for all locations across the globe, update the default template.

5. Click **Submit**.

What to do next
Use the privacy consent template to update the privacy statement in the applicable location's privacy configurations. For more information, see Generate location-based privacy configurations for Contact Tracing.

Generate location-based privacy configurations for Contact Tracing

As an administrator, generate the privacy configuration for locations set up in your instance.

Before you begin
The privacy statement in the default template is copied in each location's privacy configuration. Ensure that you have reviewed the privacy statement in the default consent template and modified it if necessary.
Role required: sn_imt_tracing.admin

About this task
You can generate a location-based, default privacy configuration for each country available in the Locations [cmn_location] table. For each location, you can specify whether the privacy consent is required and update the privacy policy statement.

Procedure
1. Navigate to **All** > **Contact Tracing** > **Privacy** > **Location Privacy Configuration**.
2. Click **Generate Location Configurations**.
   The default configuration is created for each country and appears in the Location Privacy Configurations list.
3. Open a location to review its configuration and modify it if necessary.
4. Configure the privacy consent text if necessary.

Privacy consent status	Action
Consent is not required for the location	Clear the **Needs privacy consent** check box.
Consent is required for the location	Determine the privacy consent text. ○ If you have defined a specific privacy con sent template to assign to this location, se lect it from the **Privacy consent template**. The privacy statement content from the up dated template is copied in the **Privacy statement** field. ○ Retain the default privacy statement text and make any modifications.

5. Click **Update**.

Result
The location-based privacy configuration is set.

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What to do next
Configure an email notification for a privacy consent request.

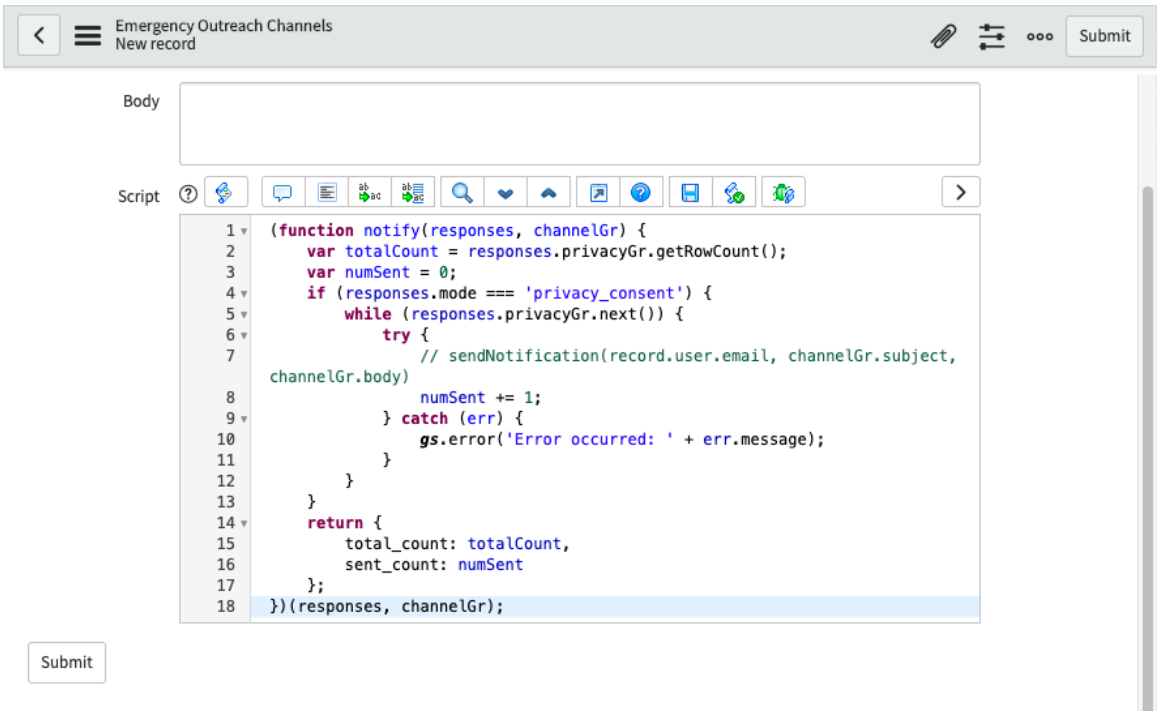
Create a custom Emergency Outreach notification channel

Create a custom Emergency Outreach notification channel to send privacy consent requests using your company's preferred communication method, such as the Slack or Microsoft Teams collaboration platforms. Create the notification channel using a script or a subflow.

Before you begin
Role required: sn_imt_checkin.checkin_admin or admin

About this task
After you create a notification channel, you can select it when sending a notification. The channel uses the specified subject and body, and sends notifications to the users that you select when you send the privacy consent request.
For example, if your company's IT network group has a Slack channel that they monitor more closely than email, you could create a Slack notification channel. To communicate with IT network group members, you would select the group as the target audience and select the Slack notification channel.

Procedure
1. Navigate to **All** > **Emergency Outreach** > **Channels**.
2. Click **New**.



3. Enter the name of your notification channel.
   Use a short name to indicate the communication method so requesters can easily pick the correct channel.
4. In the **Subject** field, enter the subject of your notification channel message.
5. In the **Body** field, enter the body of the message.
6. Create a script for the notification channel.

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a. In the **Notification type** field, leave the default notification type of **Script**.

b. In the **Script** field, replace the code in the comment with the script to connect to your channel.

Example

```
{
            //
 sendNotification(responses.privacyGr.user.email,
channelGr.subject, channelGr.body);
        }
```

For information about JavaScript APIs for GlideRecord, see GlideRecord - Scoped.

c. Click **Submit**.

Example

The following example includes code to count the number of privacy consent requests generated when the notification is sent. It displays the number of privacy consent requests that were delivered successfully. Use this information to review and handle errors that appear in the Delivery Log related list in the Outreach record.

```
(function notify(responses, channelGr) {
 var totalCount = responses.privacyGr.getRowCount();
    var numSent = 0;
    if (responses.mode === 'privacy_consent') {
        while (responses.privacyGr.next()) {
            try {
                // sendNotification(record.user.email,
 channelGr.subject, channelGr.body)
                numSent += 1;
            } catch (err) {
                gs.error('Error occurred: ' + err.message);
            }
        }
    }
    return {
        total_count: totalCount,
        sent_count: numSent
    };
})(responses, channelGr);
```

7. Create a subflow notification channel.

a. Create a subflow to use in the notification.
For information about creating, publishing, and testing subflows, see Subflows.

Use the following inputs in the subflow that you create:

- *mode* (string)
- *Privacy Consent* (Records of sn_imt_tracing_user_privacy_consent)

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If the mode is *Privacy Consent*, then acknowledgements are set to a valid GlideRecord and *survey_instances* is null.

- *channel* (Reference of sn_imt_checkin_channels)

The following outputs are optional:

- *total_count* (integer)
- *sent_count* (integer)

To review these outputs, include the number of total privacy consent requests versus the successful privacy consent requests.

b. Select the **Subflow** notification type.
The Script section changes to Flow, and the **Subflow** reference field appears.

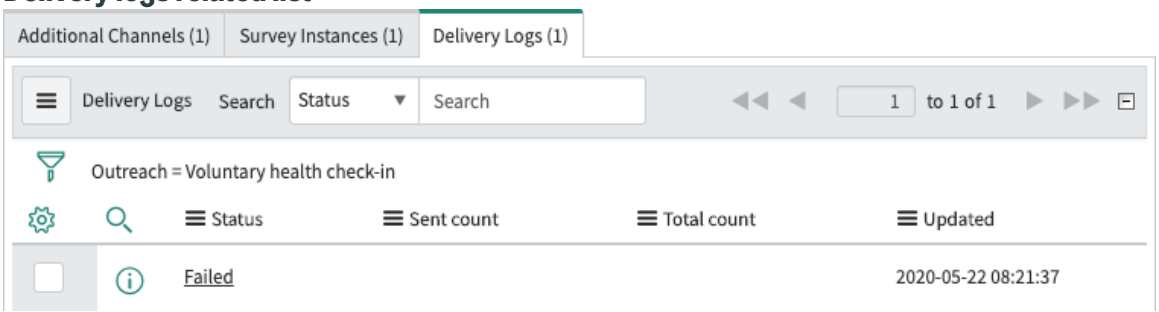
c. Select the subflow that you created.

8. Click **Submit**.

Trouble?

When a notification is sent using a custom notification channel, a Delivery Logs related list appears in the Outreach message.

Delivery logs related list



1. Test the notification channel for an outreach message.
2. Open any failed channel record to review the error messages and fix errors that caused the notification to fail.
3. Continue testing the notification channel until the channel no longer fails.

Configure an email notification for a privacy consent request

Configure an email notification to use in the Emergency Outreach app to request that employees review the organization's privacy policy and provide their consent to use their data for contact tracing.

Before you begin
Role required: admin

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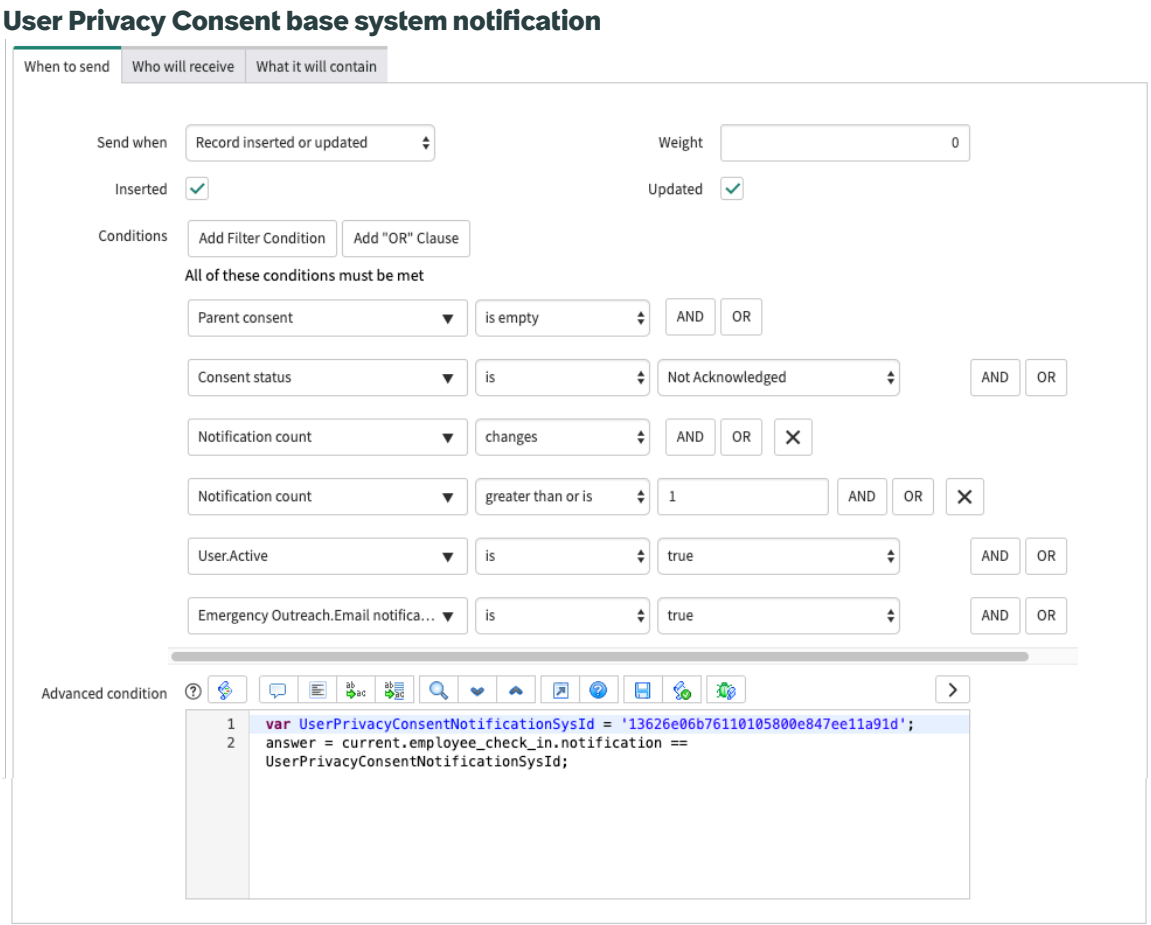
Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Review the existing **User Privacy Consent** email notification to familiarize yourself with the script and other settings.



3. Click **New**.
4. In the **Table** field, select the User Privacy Notice and Consents [sn_imt_tracing_user_privacy_consent] table.
5. On the **When to send** tab, set the conditions.
   a. In the **Conditions** field, set the criteria as shown in the image of the base system notification.
   b. Copy the following example script in the **Advanced condition** field.

```
var employeeCheckInAcmeSysId = '<replace with this
 notification sys_id';
answer = current.employee_check_in.notification ==
 employeeCheckInAcmeSysId
```

   c. Make the following modifications to the example script:
      - Give the variable a different name, for example, *employeeCheckInAcmeSysId*.
      - Enter the new notification sys_id as the value.
      - Enter the variable name that you declared at the end of the second line.

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6. On the **Who will receive** tab, open **Users/Groups in fields** and select **Assigned to**.
7. Complete the remaining information on the **What it will contain** tab.
   While entering the email content in the **Message HTML** field, make sure that you include the link to the Privacy Consent form.
8. Click **Submit**.
9. In the Notifications list, open the notification that you added and click **Preview Notification**.
10. Review the notification and make any changes required.
11. Click **Update**.

Configure an Emergency Outreach notification for Contact Tracing privacy consents

As an administrator, create or configure an Emergency Outreach notification to send email and mobile push notifications to employees requesting them to view the privacy policy and seeking their consent to use their data for contact tracing.

Before you begin

Ensure that you have the Emergency Outreach application installed. For details, see Install Emergency Outreach.

You must have generated the location-based privacy configurations.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Emergency Outreach** > **View Outreaches**.
2. Review and edit the existing outreach record **User Privacy Consent** record or click **New** to create one.
3. Enter the outreach notification name in the **Event name** field.
4. On the **Select targeted audience** tab, select the target audience for the notification, and click **Save**.
   You can choose from user lists, groups, departments, locations, or other search filters such as building, cost center, or country code.
5. On the **Content configuration** tab, select **Privacy Consent** in the **Response mode** field.
6. **Optional:** Enable the outreach to provide location-specific privacy consents by selecting the **Use Country** option on the **Content configuration** tab.

   (Optional) When enabled, the privacy statement text in Location Privacy Configuration takes precedence over text in the privacy consent templates. This text is used for the outreach, system notification email, and push notification. If you need to update the text that users receive, you must change the location's privacy statement.

   For more information on updating a location's privacy statement, see Generate location-based privacy configurations.

7. Select **User Privacy Consent** notification in the **Notification** field, and choose how to send the notification.

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- To send the notification by email, select the **Email notification** check box and enter the email subject and body.
- To send a mobile push notification, select the **Now Mobile Push notification** check box and enter the push message and a detailed push message.

  This option is available only if the ServiceNow NowMobile App Screens and Applet Launcher (com.glide.mobile-employee) plugin is activated.

- To use a custom notification channel, click the Additional Channels related list, click **Edit**, and move the channel to the Additional Channels List. Click **Save**.

  Make sure that the **Email notification** and **Now Mobile Push notification** check boxes are not selected or notifications will also be sent through those channels.

  Push notifications use the ServiceNow Request Application notification device. When users register their mobile application to an instance, this notification device is automatically created in their notification preferences. Ensure that this device is active for the users that you want to receive the push notification.

8. Click **Save**.
   The target audience and content configuration changes are saved.
9. Click **Schedule**.
10. In the Scheduled Script pop-up window, configure a scheduled job to the notification.
    For more information, see Configure a scheduled job.
11. Click **Submit**.
    A script is added to the scheduled job. The job is associated with the outreach notification.

Result

An outreach notification with a scheduled job is created. The job sends notifications to the target audience per the set schedule.

Note: The outreach notification is not sent to users in the selected audience if users do not have a location set in their user profile or the privacy consent is disabled in the location privacy configuration. The privacy consent notification is sent to a user only once even if the user is in the target audience of multiple privacy notifications.

What to do next

A user with the sn_imt_checkin.checkin_admin role can send the Outreach notification on demand.

A user with the admin or sn_imt_checkin.checkin_admin role can stop the scheduled job to send the notifications automatically. To do so, click **Schedule** and in the dialog box, clear the **Active** check box, and then click **Update**.

Map handheld computing devices assigned to employees

Map handheld computing devices that are assigned to employees and running the Zebra MotionWorks software to record proximity logs for contact tracing using those devices.

Before you begin

Handheld computing device data is stored in the Handheld Computing Device [cmdb_ci_handheld_computing] table. The table is installed with the CMDB CI Class Models application available on the ServiceNow Store. Ensure that you have that application installed and active. For more information, see CMDB CI Class Models.

Role required: sn_imt_tracing.wearable_manager

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About this task

You can also import your handheld computing devices data from an Excel spreadsheet that you use with the Zebra MotionWorks software. For more information, see Easy import data from a list.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Wi-Fi Access Management** > **Handheld Devices**.
2. Click **New**.
3. On the form, fill in the following fields required for contact tracing.

Handheld Computing Device form

Field	Description
Name	Unique name of the handheld computing device.
Asset tag	Unique ID to identify the handheld computing device.
Serial number	Unique serial number of the handheld computing device.
Assigned to	Name of the employee who has the handheld computing device.

4. Click **Submit**.

Result

A mapping of the handheld computing device and the employee to whom it is assigned is created.

Configure KINEXON integration

Configure Contact Tracing and enable the KINEXON SafeZone tracing system to use data from KINEXON wearable devices in diagnostic requests. This data enables the identification of potentially exposed contacts based on the interactions and proximity of users with KINEXON wearable devices.

Before you begin

To successfully enable the KINEXON SafeZone tracing system, note the following requirements:

- The Emergency Outreach application must be installed. For more information, see Install Emergency Outreach.
- Privacy consent settings for Contact Tracing must be configured. For more information, see Setting up data privacy consent settings for Contact Tracing.
- Users must have KINEXON wearable devices managed with KINEXON SafeZone.
- Users should have an email address in the **Name** column in the KINEXON SafeZone software. Email addresses are used to match KINEXON users to users in Contact Tracing.

Role required: admin

Procedure

1. Navigate to **All** > **Contact Tracing** > **Properties**.
2. Set the Contact Tracing property values related to the KINEXON SafeZone integration.

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Contact Tracing properties for KINEXON SafeZone integration

Property	Description
sn_imt_tracing.kinexon_api_endpoint	API endpoint used to log in to the KINEXON SafeZone instance and access KINEXON data. This API endpoint is also used to fetch information required for Contact Tracing. Replace the default endpoint with the endpoint of your instance.
sn_imt_tracing.kinexon_api_username	KINEXON administrator user name.
sn_imt_tracing.kinexon_api_password	KINEXON administrator password.
sn_imt_tracing.kinexon_api_param_min_duration	The minimum duration of contact (in seconds) between two KINEXON sensors required to determine whether a user is a potentially exposed contact. The query omits all records with values below this duration. The

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Property	Description
	default value is 300.
sn_imt_tracing.kinexon_api_param_min_acc_duration	The minimum total duration (in seconds) of all contact between two KINEXON sensors within the queried date range. If the total duration is shorter than this value, the query omits all records of contact between the pair of sensors. The default value is 300.
sn_imt_tracing.kinexon_api_param_max_distance	The maximum distance (in meters) between two KINEXON sensors that determines whether users are in contact. The query omits any instances of contact beyond this distance. The default value is 2.
sn_imt_tracing.kinexon_api_param_max_time_gap_in_sequence	Determines the amount of time that can pass (in seconds) between any two consecutive instances

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Property	Description
	of contact before the potential exposure is considered two potential exposures. The default value is `15`.

3. Navigate to **Emergency Exposure Management** > **Tracing Systems** and click **Kinexon SafeZone**.
4. Activate the tracing system.
   a. Select **Active**.
   b. Click **Update**.
5. Add all users with KINEXON wearable devices in your organization to the privacy consent audience.
   a. Navigate to **Emergency Outreach** > **Safe Workplace Audience** and click **privacy audience**.
   b. Add users to the audience.
   For detailed instructions on adding users to an audience, see Add a Safe Workplace audience
   c. Click **Update**.
6. Assign the sn_imt_core.privacy_consent_user role to KINEXON users to enable them to access and complete the privacy consent.
7. Send your organization's privacy consent outreach to KINEXON users.
   Users in a location that requires privacy consent must consent to the privacy policy to create exposed contact records. Users who do not have an assigned location or are in a location that does not require privacy consent do not have to submit a privacy consent.

Result

You can now use the KINEXON SafeZone tracing system in diagnostic requests. For more information on identifying potentially exposed contacts using diagnostic requests, see Identify potentially exposed contacts.

Virtual Agent conversations for Contact Tracing

Contact Tracing provides a Virtual Agent conversation to assess the health of potentially exposed contacts via SMS.

Overview

A Virtual Agent conversation topic enables a dialog between the Virtual Agent (chatbot) and a user to accomplish a specific goal. The provided Exposure conversation topic for Contact Tracing asks potentially exposed contacts questions based on the Exposure Case Task Survey. Contact tracers use the responses to assess the health of a potentially exposed contact.

Contact Tracing uses an SMS outreach to initiate the Virtual Agent conversation and begin the survey. The Exposure Case Task Survey outreach can be sent automatically when users are

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added to case tasks as exposed contacts. Alternatively, contact tracers can send the survey manually while working on a case task by selecting the **Send SMS Survey** button. Users who receive the survey can reply back via SMS.

Organizations can use the Exposure conversation topic and Exposure Case Task Survey as provided or customize it. For example, you might want to add a "Prefer not to say" answer option to one or more questions.

Note: To complete the customization, you must apply any changes to both the Exposure conversation topic in **Virtual Agent** > **Designer** and the Exposure Case Task Survey in **Survey** > **View Surveys**. Applying changes to only the conversation topic or the survey will not update both the topic and survey.

- For more information on updating conversation topics, see Virtual Agent Designer.
- For more information on updating surveys, see Survey designer.

Installation and setup requirements

Note the following requirements to use Virtual Agent with SMS:

- A Twilio account and phone number.
- The Emergency Outreach application.

  For details, see Install Emergency Outreach.
- The Virtual Agent plugin (com.glide.cs.chatbot).
- Conversational SMS Integration with Twilio application (sn_va_sms_twilio).

  For more information, see Set up the Conversational SMS Integration with Twilio.

Note the following requirements for users to complete Exposure Case Task Surveys via SMS:

- Your organization must install and set up Virtual Agent for use with SMS.
- To receive SMS messages for Contact Tracing, users must have a mobile phone number listed on their user record [sys_user]. Mobile numbers must be in E.164 format, for example, `+18585551212`.
- Privacy consent for Contact Tracing must be configured before users can reply to SMS messages. For instructions and more information, see Setting up data privacy consent settings for Contact Tracing.
- Users must agree to the privacy consent before they can respond to the survey.

Send Exposure Case Task Surveys automatically via SMS

As an administrator, you can configure Contact Tracing to enable Exposure Case Task Surveys to be automatically sent via SMS.

Before you begin

Ensure that the installation and setup requirements to enable Virtual Agent conversations for Contact Tracing are met. For more information, see Virtual Agent conversations for Contact Tracing.

Role required: admin

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About this task

Enable the *sn_imt_tracing.enable_sms_exposure_survey* property so that Exposure Case Task Surveys are sent automatically when users are added to Exposed Contacts. Potentially exposed contacts can respond to the surveys via SMS, providing contact tracers with an assessment of their health status.

Procedure

1. Configure the *sn_imt_tracing.enable_sms_exposure_survey* property.
   a. Navigate to **Contact Tracing** > **Administration** > **Properties**.
   b. Set the *sn_imt_tracing.enable_sms_exposure_survey* property to **Yes**.
   c. Click **Save**.
2. **Optional:** Modify the survey questions and answers sent to potentially exposed contacts.

   Example
   For example, add a "Prefer not to say" answer option to one or more questions.

   a. Update the Exposure Virtual Agent conversation topic in **Virtual Agent** > **Designer**.
   For more information on updating conversation topics, see Virtual Agent Designer.

   b. Update the Exposure Case Task Survey in **Survey** > **View Surveys**.
   For more information on updating surveys, see Survey designer.

   Trouble?

   (Optional) To complete the customization, you must apply any changes to both the Exposure conversation topic in **Virtual Agent** > **Designer** and the Exposure Case Task Survey in **Survey** > **View Surveys**. Applying changes to only the conversation topic or the survey will not update both the topic and survey.

Result

When adding users to potentially exposed contacts in case tasks:

- Potentially exposed contacts are automatically added to the Exposure case task survey audience.
- The Exposure Case Task Survey outreach sends the SMS notification to the audience and the Virtual Agent processes the responses, executing the survey as an SMS conversation.
- Survey answers are stored in the [asmt_metric_result] table.

Maintaining user data privacy in Contact Tracing

The Contact Tracing application enables your organization to maintain the data privacy of all users given the high sensitivity of the data collected throughout the contact tracing process.

The following Contact Tracing features can help your organization enforce data privacy for your users:

User privacy consent

Provide your organization's privacy policy to users and enable them to agree or disagree to the use of their data for contact tracing. Use the privacy consent requirement to ensure that your users acknowledge the privacy consent request before entering the workplace.

Confidential cases

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Enable case managers to mark cases as confidential if they have been created for affected users who need complete privacy protection. Confidential cases can be accessed only by the case manager and users included in the watch list.

Data retention

Set a timeline to keep the data no longer than required.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Organizations' specific requirements.

User privacy consent for Contact Tracing

The Contact Tracing application enables you to send notification to users seeking their consent for contact tracing. You can use user data for contact tracing based on the privacy configuration set for a location and the user response to the privacy consent.

You can determine whether privacy consents are needed for specific locations. If a location does not need privacy consent, the user data belonging to that location can be automatically considered for contact tracing.

If a location requires privacy consents and a user has not consented to use the data, that user will be flagged, which has the following impact in contact tracing:

- You can create a case for those users but cannot run a diagnostic request for them.
- You cannot create a diagnostic request to identify potentially impacted users for those users.
- If a diagnostic request was created for the user before the user declined to give consent, you cannot run the diagnostic request.
- In a diagnostic request for another affected user, non-consenting users are excluded in the impacted users list. However, they can be added to the impacted users manually.

Privacy consent requirements ensure that your users complete a privacy consent before entering the workplace to facilitate the use of their data for contact tracing.

- Users who agree to the use of their data for contact tracing, the status of their privacy consent requirement updates to Clear. Meeting the privacy consent requirement makes those users eligible to enter the workplace.
- Users who disagree to the use of their data for contact tracing, the status of their privacy consent requirement updates to Not Clear. Meeting the privacy consent requirement makes those users eligible to enter the workplace.

Important: Any data collected for contact tracing before a user withdraws consent remains in the system. The data will be deleted from the system depending on your data retention settings.

Setting up privacy consents for Contact Tracing

As an admin, you must configure the following settings to use privacy consents with Contact Tracing:

1. Modify or add a privacy consent template for Contact Tracing
2. Generate location-based privacy configurations for Contact Tracing
3. Create a custom Emergency Outreach notification channel
4. Configure an email notification for a privacy consent request
5. Configure an Emergency Outreach notification for Contact Tracing privacy consents

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Send an Emergency Outreach notification for employee privacy consents in Contact Tracing

Send an Emergency Outreach notification, on demand, to employees to provide the privacy policy and seek their consent to use their data for contact tracing.

Before you begin

Ensure that you have the Emergency Outreach application installed. For details, see Install Emergency Outreach.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin or admin

About this task

Important: The privacy consent notification is sent to a user only once even if the user is in the target audience of multiple privacy consent notifications.

Procedure

1. Navigate to **All** > **Emergency Outreach** > **View Outreaches**.
2. Open the **User Privacy Consent** outreach record.
3. On the **Safe Workplace Audience** tab, select the audience from the list, and click **Save**.
   If you don't have an audience defined, click **New** and define an audience from user lists, groups, departments, locations, and so on. After you save the Safe Workplace audience, you can use it to send any outreach message. For more information, see Add a Safe Workplace Audience.
4. On the **Content configuration** tab, select **Privacy Consent** in the **Response mode** field.
5. **Optional:** Enable the outreach to provide location-specific privacy consents by selecting the **Use Country** option on the **Content configuration** tab.

   (Optional) When enabled, the privacy statement text in Location Privacy Configuration takes precedence over text in the privacy consent templates. This text is used for the outreach, system notification email, and push notification. If you need to update the text that users receive, you must change the location's privacy statement.

   For more information on updating a location's privacy statement, see Generate location-based privacy configurations.

6. On the **Content configuration** tab, select a notification in the **Notification** field, and choose how to send the notification.
   - To send the notification by email, select the **Email notification** check box.
   - To send a mobile push notification, select the **Now Mobile Push notification** check box.

     This option is available only if the ServiceNow NowMobile App Screens and Applet Launcher (com.glide.mobile-employee) plugin is activated.

     Push notifications use the ServiceNow Request Application notification device. When a user registers their mobile application to an instance, this notification device is automatically created in their notification preferences. Ensure that this device is active for the users that you want to receive the push notification.

7. Review the message content.
   - For email notifications, review the email subject and email body and modify it if necessary.
   - For push messages, review the message details.

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8. Click **Update**.
   The target audience and content configuration changes are saved.
9. To send the notification, click **Schedule**.
10. In the Scheduled Script pop-up window, click **Execute Now**.

Result
The notification is sent to the target audience.

Note: The outreach notification is not sent to any users in the selected audience who do not have a location set in their user profile or whose privacy consent is disabled in the location privacy configuration.

What to do next
Review user privacy consents in Contact Tracing to see who has responded to the notification.

Respond to a request for privacy consent in Contact Tracing

When you receive an email or mobile notification for privacy consent, read the privacy policy statement and submit a response indicating whether you agree to the usage of your data for contact tracing.

Before you begin
You must have received a mobile or email push notification to be able to submit your response to the privacy policy request.
Role required: sn_imt_tracing.privacy_consent_user

About this task
You can also click the link included in the notification to submit your response.

Procedure
1. Navigate to **All** > **Contact Tracing** > **Privacy** > **My Privacy Consent**.
2. Read the privacy policy statement in the **Privacy Notice** field.
3. Select your response and click **Submit**.
   - If you agree to the privacy policy and use of your data, select **I Agree**.
   - If you do not want the organization to use your data, select **I Disagree**.

   Note: If you previously agreed to the privacy consent, a **Withdraw Consent** option is available. You can change your response to withdraw your consent by selecting **Withdraw Consent** and clicking **Submit**.

Result
Your current privacy consent decision is updated.
The status of the notification updates to Acknowledged.

If you have the Employee Readiness Core application installed and a health and safety requirement for the privacy consent activated, a record is created with the requirement status:

- If you agreed to the privacy policy and use of your data, the requirement status updates to Cleared.
- If you disagreed or withdrew your consent, the requirement status updates to Not Cleared.

Submit a privacy consent for Contact Tracing from a mobile phone

If you receive a mobile push notification request for a data privacy consent, read the privacy policy statement and indicate whether you agree to the use of your data for contact tracing.

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Before you begin

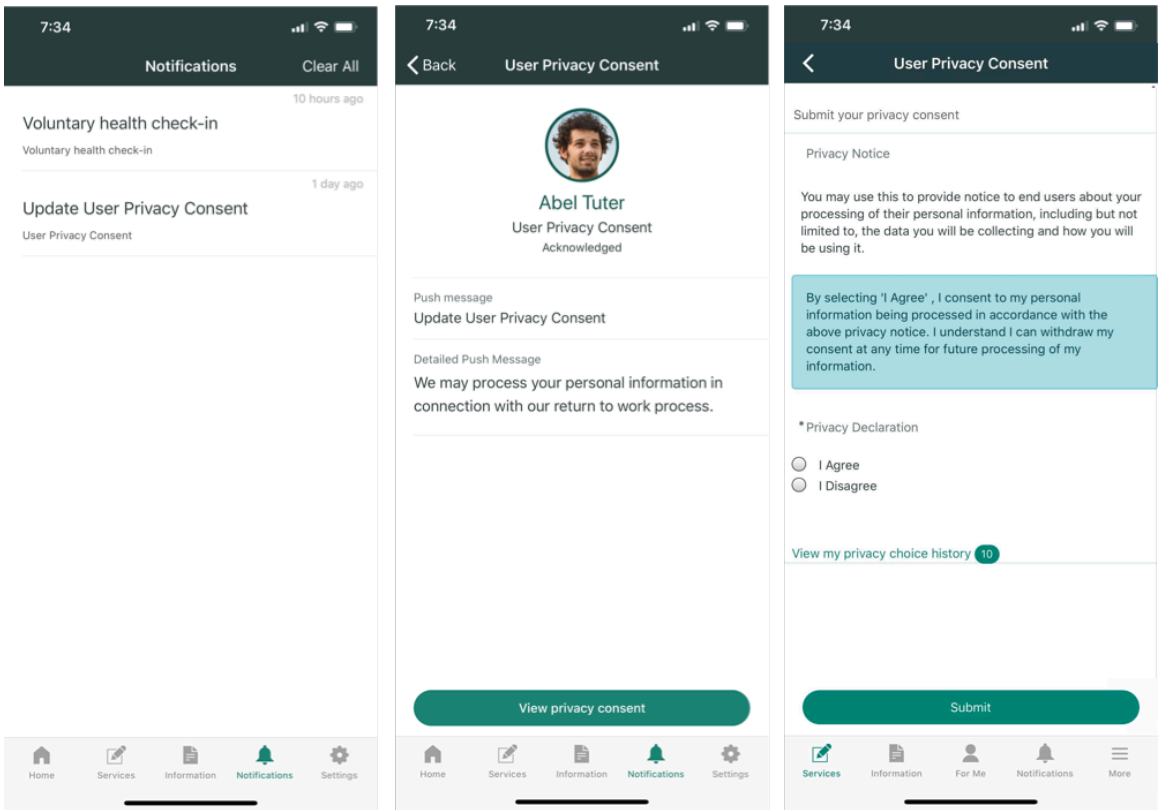
To receive mobile push notifications, you must have the Now® Mobile app.

Role required: sn_imt_tracing.privacy_consent_user

Procedure

1. Tap the notification to open the message.
2. In the message, tap **View privacy consent**.
3. Read the privacy policy statement in the **Privacy Notice** field.
4. Select your response and click **Submit**.
   - If you agree to privacy policy and use of your data, select **I Agree**.
   - If you do not want the organization to use your data, select **I Disagree**.

> **Note:** If you previously agreed to the privacy consent, the **Withdraw Consent** option is available. You can change your response to withdraw your consent by selecting **Withdraw Consent** and clicking **Submit**.



Result

Your current privacy consent decision is updated.
The status of the notification updates to Acknowledged.

If you have the Employee Readiness Core application installed and a health and safety requirement for the privacy consent activated, a record is created with the requirement status.

- If you agreed to the privacy policy and use of your data, the requirement status updates to Cleared.
- If you disagreed or withdrew your consent, the requirement status updates to Not Cleared.

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Review user privacy consents in Contact Tracing

Review user privacy consent responses submitted by employees in answer to notifications seeking their consent to use their data for contact tracing.

Before you begin
Role required: sn_imt_tracing.admin

Procedure

1. Navigate to **All** > **Contact Tracing** > **Privacy** > **User Privacy Consents**.
2. Click the status in the **Consent status** column to open the employee's consent record.
3. Review the employee's responses in the Consent History related list.
   - If employees have responded and agreed to have their data used, the preference is **I Agree**.
   - If employees have responded and have not agreed to have their data used, the preference is **I Disagree**.
   - If employees previously agreed to have their data used but later withdrew the consent, the preference is **Withdraw Consent**.
   - If employees have not responded yet, the preference is **Awaiting Response**.

   Note: The consent history record with the latest preference submitted date is the last response from the employee.

   You can send the notification again to employees who have not yet responded.

Collecting user badge data

In the Contact Tracing application, manage data for user badges and badge readers. Identify potentially exposed users who may have come in contact with affected users by importing their badge swipe data into the application.

Use this badge swipe data when running the diagnostic requests in the Emergency Exposure Management application.

Add badge reader details

Create entries for all badge reading devices that are installed at your workplace to control employee access to building, floors, and workspaces.

Before you begin
Role required: sn_imt_tracing.badge_manager

About this task
You can also import your badge reader data from an Excel spreadsheet. For more information, see Easy import data from a list.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Badge Management** > **Badge Readers**.
2. To add details of a new badge reader device, click **New**, or select an existing badge reader to edit the details.
3. On the form, fill in the fields.

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Badge Reader form

Field	Description
Name	Name of the device. Use a name that makes it easy to identify the device.
Active	Option for marking the functional or availability status of the device. If a badge device reader is not working or is removed, clear this check box.
Status	Status of the device. If the device is under repair or has any issue, you can enter the status in this field.
Device Identifier	Unique ID of the device. This value can be the hardware ID or serial number of the device.
Short description	Brief description of the device.
Floor name	Location where the device is installed on the premises.
Type	Type to determine if the device is installed at the entry or exit point of the workspace, floor, restricted area, or building entrance or exit gates.

4. Click **Submit**.

Add user badges

Add user badges that are assigned to employees to use with badge readers when they enter or exit controlled access locations in the workplace. These badges can be used with badge readers for building entry, exit gates, or floors.

Before you begin

Role required: sn_imt_tracing.badge_manager

About this task

You can also import your user badge data from an Excel spreadsheet. For more information, see Easy import data from a list.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Badge Management** > **User Badges**.
2. Click **New** to add details of a new user badge or select an existing user badge to edit.
3. On the form, fill in the fields.

User Badge form

Field	Description
Active	Option for marking the user badge as active. Only active user badges can be swiped through the badge reader.
Badge number	Unique badge number.

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Field	Description
User	Name of the employee who owns the badge.
Facility code	Code that identifies the original location of the employee and badge.

4. Click **Submit**.

Import your badge reader data from an Excel spreadsheet

Import your badge reader data from an Excel spreadsheet into the Badge Access Register table.

Before you begin

Ensure that you have added all your user badge and badge reader data.

Role required: sn_imt_tracing.badge_manager

Procedure

1. Navigate to **All** > **Contact Tracing** > **Badge Management** > **Badge Access Register**.
2. Click **Import Badge Data**.
3. In the Scheduled Data Imports list, open **Badge Access Register Scheduled Import**.
4. Attach the Excel file and load data in the Import Set table.
   a. Click the preview icon ( ) next to the **Data source** field, and then click **Open Record**.
   b. On the Data Source form, click the manage attachments icon ( ).
   c. Click **Choose File** and select the source Excel file.
   d. Click **Download All**.
   The Excel file is attached to the data source record.
   e. Click the **Load All Records** related link to load the Excel data.
   The imported data is available in the new Import Set table, Badge Access Register Stage [sn_imt_tracing_badge_access_register_stage].
5. Click **Execute Now**.
   The process runs in the background to load data from the Badge Access Register Stage table to the Badge Access Register table.

   Note: Depending on the number of records in the source Excel file, it might take a longer time for the imported data to be available in the Badge Access Register table.

6. **Optional:** Verify that the data records were imported into the Badge Access Register table by navigating to **Contact Tracing** > **Badge Management** > **Badge Access Register**.

Related topics

Importing data using import sets

Schedule a data import

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Collecting risk scores in Contact Tracing

Identify at-risk and potentially exposed users by importing and monitoring risk scores from their wearable devices and external systems.

Use risk scores to identify at-risk and potentially exposed users by integrating the Devvio DevvTrace platform. Create cases to investigate potentially exposed or infected users based on their scores.

The Devvio DevvTrace platform collects data from supported wearable devices and generates a risk score. Use Contact Tracing and the Devvio API to import data into the Devvio Users Risk Reports [sn_imt_tracing_devvio_users_risk_report] table. You can use this data in the following ways:

- Update the Devvio Users Risk Reports table daily with the Devvio Integration scheduled job.
- Create cases and work notes automatically if a risk score is equal to or greater than a risk threshold value.
- Examine the Daily Risk Scores for Devvio users report to analyze daily trends. The indicator source for use in Performance Analytics is Devvio.Users.Risk.Report.

Configure Devvio integration

Configure Contact Tracing properties to import risk scores from the DevvTrace platform using the Devvio API.

Before you begin

Ensure you have a Devvio administrator user name and password.

Role required: sn_imt_tracing.wearable_admin or admin

About this task

ServiceNow Contact Tracing integrates with the DevvTrace platform to collect user risk scores based on interactions at the workplace. To leverage risk scores from DevvTrace, your employees must be using supported wearable devices and you must have access points for Devvio.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Administration** > **Properties**.
2. Set the Contact Tracing property values related to the Devvio integration.

Contact Tracing properties for Devvio integration

Property	Description
sn_imt_tracing.devvio.login.api.endpoint	API endpoint used to log in to the Devvio instance and access DevvTrace data.
sn_imt_tracing.devvio.integration.username	Devvio administrator user name.
sn_imt_tracing.devvio.integration.password	Devvio administrator password.

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Property	Description
sn_imt_tracing.devvio.risk.report.api.endpoint	Devvio Risk Report API endpoint used to fetch risk report and scores.
sn_imt_tracing.devvio.risk.threshold	The risk threshold value for Devvio case creation. The default value is 90. ○ If the risk score is greater than or equal to this value but less than 100, the health status is set to **Under Investigation**. ○ If the risk score is equal to 100, the health status is set to **Infected**, regardless of this value.

3. Click **Save**.

Result

The Devvio Users Risk Report updates daily at midnight (00:00) instance time. New cases are created when risk scores trigger Devvio case creation. For these cases, the reported source is set to **Wearable**. If a user has an open case and their risk score is greater than or equal to the risk threshold value, the case is updated and a work note is added.

Note: If a user with an open case has a health status other than **Cleared**, a work note is added but the source remains unchanged. If a user with an open case has a health status of **Cleared**, their health status updates to **Under Investigation** or **Infected** and a work note is added. The source for the case remains unchanged.

Retrieving Wi-Fi access log data

Contact Tracing provides the following options:

- Manually upload data from a Microsoft Excel spreadsheet by using the import Wi-Fi access logs option
- Automatically get the Wi-Fi access logs from external systems by using the integration option

Integration with the following systems is available:

Integration with Mist Systems

Use the Mist Systems API to automatically import the Wi-Fi access logs data into the Wi-Fi Access Register table.

Integration with Cisco DNA Spaces

Import the Cisco DNA Spaces Wi-Fi access data into the Wi-Fi Access Register [sn_imt_tracing_wifi_access_register] table by either generating a proximity report or downloading the access data into a spreadsheet and then uploading it.

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- Microsoft Excel spreadsheet: Download the proximity report from Cisco DNA Spaces and attach the file in the diagnostic request task.
- Proximity report: Log in to the Cisco DNA Spaces portal and generate the proximity report by providing the diagnostic request task number. The proximity report containing the Wi-Fi access logs is posted into the Wi-Fi Access Register table.

  For more information, see Fetch potentially exposed user data from a data source.
- Wi-Fi access data files: Import Wi-Fi access data from the files from a Secured FTP server into the Wi-Fi Access Register table. Cisco DNA Spaces system uploads these raw data files containing the Wi-Fi access data each day on a scheduled time. The data is imported from these files when you run the diagnostic request to identify potentially exposed employees.

Note: The file from the SFTP server for a specific day is imported into the Wi-Fi Access Register table only once. Any subsequent diagnostic requests use the data in the table to generate the list of potentially exposed employees.

Add wearable devices assigned to employees

Add wearable devices such as Bluetooth LE-enabled devices that are assigned to employees to enable them to connect to the Wi-Fi network in your workplaces.

Before you begin

The wearable device data is stored in the Wearable Technology [cmdb_ci_wearable] table. The table is installed with the CMDB CI Class Models application available on ServiceNow Store. Ensure that you have the CMDB CI Class Models application installed and active. For more information, see CMDB CI Class Models.

Role required: sn_imt_tracing.wifi_manager

About this task

You can also import your wearable devices data from an Excel spreadsheet. For more information, see Easy import data from a list.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Wi-Fi Access Management** > **Wearables**.
2. Click **New** to add details of a new device or select an existing device to edit.
3. On the form, fill in the following fields required for contact tracing.

Wearable Technology form

Field	Description
Name	Unique name of the wearable device.
Asset tag	Unique ID to identify the wearable device.
Assigned to	Name of the employee who has the device.
Category	Category of the device.
MAC address	MAC address of the device.

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Field	Description
	Follow the steps in Configuring the form layout to add this field to the Wearables form.

4. Click **Submit**.

Create an organization and load sites

Create an organization for which you are collecting the Wi-Fi access logs using Mist Systems. After you have created an organization, load sites using a scheduled job.

Before you begin

Role required: sn_imt_tracing.wifi_admin

About this task

Each floor in the organization can be considered as a site. Each site can be further divided into zones. Each zone can have multiple Wi-Fi access points.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Mist Systems** > **Organizations**.
2. Click **New**.
3. On the form, fill in the fields.

Organization form

Field	Description
Name	Name of the organization.
Organization Id	Unique ID of the organization. You must have the network admin role to get the organization ID. For more information, see the Mist Systems documentation.
Active	Option for marking the availability status of the organization. If the organization is removed, clear this check box.
Vendor	Mist Systems
API token	API token that is generated for the organization. You must have the network admin role to get the API token. For more information, see the Mist Systems documentation.

4. Click **Submit**.
5. Click **Load Sites**.
   The sites of the organization are fetched from the Mist Systems and displayed in the **Sites** related list. Later, the **Load Mist Sites** scheduled job runs at the configured time and updates the sites list for each of the organizations.

   The **BLE enabled** option helps you to identify potentially infected employees from the Wi-Fi access logs by correlating everyone who connected to the Wi-Fi network using Bluetooth LE devices. If a site is BLE enabled, the **BLE enabled** check box on the Sites form is selected.

Configure Cisco DNA Spaces settings for Wi-Fi access logs

Set up the Cisco DNA Spaces integration for Wi-Fi access logs.

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Before you begin
Role required: admin

About this task
Cisco DNA Spaces integration provides two options to get the Wi-Fi access data from Cisco DNA Spaces into your ServiceNow instance.

- By generating and downloading the proximity report from the Cisco DNA Spaces portal or through a manual import.
- By importing Wi-Fi access raw data files from a secured FTP (SFTP) server. These files are uploaded from Cisco DNA Spaces every day at a scheduled time.

To specify which option to use, configure the *sn_imt_tracing.wifi_log_cisco_tier* system property. For each option, you must also complete additional settings.

Procedure
1. Complete the following steps for using Wi-Fi access data from the proximity report.

   a. Create an OAuth application endpoint for Cisco DNA Spaces and share the Client Id and Client Secret with Cisco to complete the integration on their side.

      On the Application Registries form, enter the following callback URL in the **Redirect URL** field based on the region:

      - USA region: `https://dnaspaces.io/integrations/servicenow`
      - Europe region: `https://dnaspaces.eu/integrations/servicenow`

      For more information on creating the OAuth application endpoint and description of other fields on the form, see Create an endpoint for clients to access the instance.

   b. Log in to the Cisco DNA Spaces portal to register and authenticate the application to complete the integration.

   c. Set the proximity level in the *sn_imt_tracing.wifi_proximity_preference* system property to consider employee interaction with an affected employee as potential exposure.
      For more information, see System properties for tracing systems in Emergency Exposure Management.

   d. Review the base system *DiagnosticTaskImportUtil* script include.
      The *DiagnosticTaskImportUtil* script include creates a data source from the attachment in a diagnostic request task and imports the data into the Wi-Fi Access Register [sn_imt_tracing_wifi_access_register] table.

      For more information, see Script includes.

2. Set system properties to use the Wi-Fi access data files imported from the SFTP server into the Wi-Fi Access Register table.

   a. Navigate to **Contact Tracing** > **Administration** > **Properties**.

   b. Configure the following system properties:

      - *sn_imt_tracing.wifi_log_sftp_server*
      - *sn_imt_tracing.wifi_log_sftp_port*

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- *sn_imt_tracing.wifi_log_sftp_file_path*
- *sn_imt_tracing.wifi_log_sftp_load_time*
- *sn_imt_tracing.wifi_log_sftp_username*
- *sn_imt_tracing.wifi_log_sftp_password*

For more information on these properties, see System properties for tracing systems in Emergency Exposure Management.

3. Configure office locations that contain Cisco Wi-Fi devices.
   a. Navigate to **Contact Tracing** > **Wi-Fi Access Management** > **Wi-Fi Diagnostic Preferences**.
   b. Click **Generate Location Preferences**.
   c. In the Generate Location Preferences window, select **Use Cisco DNA Spaces** from the list.
   d. Click **OK**.
   All locations with the **Use Cisco DNA Spaces** preference use the Wi-Fi access data from Cisco DNA Spaces.

What to do next

Run the diagnostic request using the Wi-Fi access logs for an employee who is classified as positive for a condition, such as COVID-19, and is from a location with a Cisco Wi-Fi network. The Wi-Fi access logs provide a list of potentially impacted employees who used the same Wi-Fi network as the affected employee. For more information on running the diagnostic request, see Identify potentially exposed users.

Import your Wi-Fi access logs spreadsheet

Import Wi-Fi access logs from an Excel spreadsheet into the Wi-Fi Access Register table.

Before you begin

Role required: sn_imt_tracing.wifi_manager

Procedure

1. Navigate to **All** > **Contact Tracing** > **Wi-Fi Access Management** > **Wi-Fi Access Register**.
2. Click **Import Wi-Fi Access Data**.
3. In the Scheduled Data Imports list, open **Wi-Fi Access Register Scheduled Import**.
4. In the **Data Source** field, open the **Wi-Fi Access Register Data Source** record.
   a. Click the manage attachments icon ( ).
   b. Click **Choose File** and select the source Excel file.
   c. Click the **Load All Records** related link to load the Excel data.
5. Navigate to Scheduled Import record.
6. Click **Execute Now**.
   The process runs in the background to load data from the Wi-Fi Access Register Stage table to the Wi-Fi Access Register table.

   Note: The number of records in the source Excel file affect the time needed before the imported data is available in the Wi-Fi Access Register table.

7. **Optional:** Verify that the data records were imported into the Wi-Fi Access Register table by navigating to **Contact Tracing** > **Wi-Fi Access Management** > **Wi-Fi Access Register**.

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Use Wi-Fi access logs from Mist Systems

Identify potentially exposed employees using Wi-Fi access logs from Mist Systems.

Before you begin

Role required: sn_imt_tracing.wifi_admin

About this task

ServiceNow Contact Tracing integrates with an external application, Mist Systems, to collect and process Wi-Fi access logs for organizations. To leverage access logs from Mist Systems, you must have Mist access points installed at your workplace.

Procedure

1. Set up the Contact Tracing Wi-Fi properties.
   - By default, the asset data is available in the Computer table [cmdb_ci_computer]. If you are using a different table, specify it using the *sn_imt_tracing.wifi_client_table* property.
   - Ensure that the MAC address is populated in the **mac_address** field in the table that has the asset data.

   For more information, see System properties for tracing systems in Emergency Exposure Management.
2. Set up the Contact Tracing BLE properties.
   - By default, the asset data is available in the Wearable Technology [cmdb_ci_wearable] table. If you are using a different table, specify it using the *sn_imt_tracing.wifi_ble_client_table* property.
   - Ensure that the MAC address is populated in the **mac_address** field in the table that has the asset data.

   Note: The Wearable Technology [cmdb_ci_wearable] table is installed with the CMDB CI Class Models application available on ServiceNow Store. For more information, see CMDB CI Class Models.

   For more information on adding BLE-enabled devices or other wearable devices, see Add wearable devices assigned to employees.
3. Set up an organization and load sites.
   For more information, see Set up an organization and load sites.
4. Indicate that the diagnostic data should be accessed from Mist Systems.
   a. Navigate to **Contact Tracing** > **Wi-Fi Access Management** > **Wi-Fi Diagnostic Preferences**.
   b. Click **Generate Location Preferences**.
   c. In the Generate Location Preferences window, select **Use Mist Integration** from the list.
   d. Click **OK**.
   The access log data for all locations will be taken from Mist Systems access log files.
5. If you want to use manually loaded access logs rather than Mist Systems logs for a specific location, create a separate location assignment.
   a. Click **New**.
   b. Specify the location for which you want to set the diagnostic preference.
   c. Set the **Preference** value to **Use Manual Load**.
   d. Click **Submit**.

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6. Run the diagnostic request.
   a. Select the **Use Wi-Fi access log** check box.
   b. Specify the start date and end date.
   c. Click **Run Diagnostics**.
   For more information about how to run a diagnostic request, see Run a diagnostic request.

Result

Mist Systems identifies the MAC addresses of the affected user for the specified start date and end date. The MAC addresses identify the zones visited by the affected employee. Potentially exposed employees who visited those zones are identified and displayed in the related list of the diagnostic request.

Use imported Wi-Fi access logs

Identify potentially exposed employees by manually importing Wi-Fi access logs into the Wi-Fi Access Register table.

Before you begin

Role required: sn_imt_tracing.wifi_admin

Procedure

1. Set up the Contact Tracing Wi-Fi properties.
   By default, the asset data is available in the Computer table [cmdb_ci_computer]. If you are using a different table, specify it using the *`sn_imt_tracing.wifi_client_table`* property.

   For more information, see System properties for tracing systems in Emergency Exposure Management.

2. Indicate that the diagnostic data should be accessed from manually loaded access logs.
   a. Navigate to **Contact Tracing** > **Wi-Fi Access Management** > **Wi-Fi Diagnostic Preferences**.
   b. Click **Generate Location Preferences**.
   c. In the Generate Location Preferences window, select **Use Manual Load** from the list.
   d. Click **OK**.
   The access log data for all locations will be taken from manually loaded access logs.
3. If you want to use Mist Systems access logs rather than manually loaded logs for a specific location, create a separate location assignment.
   a. Click **New**.
   b. Specify the location for which you want to set the diagnostic preference.
   c. Set the **Preference** value to **Use Mist Integration**.
   d. Click **Submit**.
4. Import Wi-Fi access logs into the Wi-Fi Access Register table [sn_imt_tracing_wifi_access_register] using an Excel spreadsheet.
   For more information, see Import your Wi-Fi access logs spreadsheet.
5. Run the diagnostic request.
   a. Select the **Use Wi-Fi access log** check box.
   b. Specify the start date and end date.
   c. Click **Run Diagnostics**.
   For more information about how to run a diagnostic request, see Run a diagnostic request.

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Result
Potentially exposed employees are displayed in the related list of the diagnostic request.

Tracking employee contacts using daily logs

After employees start returning to the workplace, use daily contact logs to help promote the health and safety of all your employees. Let employees submit a list of other people with whom they come in contact during the day. Send mobile and email push notifications to employees to submit their contact log for the day.

Keep a track of the employees who have responded from the daily contact log responses. You can resend notifications to employees who have not responded to alert them for submitting their daily contact log.

The employee daily contact log in the Contact Tracing application works with the Emergency Outreach application. For more information, see Emergency Outreach.

A user with the sn_imt_checkin.checkin_admin role for Emergency Outreach can review and modify the outreach notification for the daily contact log. For more information, see Configure an Emergency Outreach notification for the daily contact log.

An administrator can modify the schedule associated with the outreach notification to configure the timing to send notifications to employees. For more information, see Configure a scheduled job.

Note: If you are using Service Portal using a URL suffix other than the default `/sp`, update the same in the Daily Log form for it to work properly. You must associate the form with the service catalog. For more information on Service Portal, see Create a portal and for Service Portal page navigation, see Page navigation by URL.

Send an Outreach notification for the daily contact log

Send an Emergency Outreach notification, on demand, to employees to ask them to submit a list of co-workers whom they have interacted with on a given day.

Before you begin
Ensure that you have the Emergency Outreach application installed. For details, see Install Emergency Outreach.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Contact Tracing** > **Administration** > **Daily Log Alerts**, and then click **New**.
2. On the **Safe Workplace Audience** tab, select the target audience for the notification, and click **Save**.
   - If you don't have an audience defined, click **New** and define an audience from user lists, groups, departments, locations, and so on. For more information, see Add a Safe Workplace Audience.
   - If you have the Employee Health Screening application installed, the **Use Employee Health Screen Data** option is available. Select this check box to include all employees cleared in

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the health screening to enter the premises. For more information, see Employee Health Screening.

- If you have the Workplace Core application installed, the **User Workplace Reservation Data** option is available. Select this check box to include all employees with confirmed or approved reservations for that day. For more information, see Workplace Core.

3. On the **Content configuration** tab, select a notification in the **Notification** field, and choose how to send the notification.
   - To send the notification by email, select the **Email notification** check box.
   - To send a mobile push notification, select the **Now Mobile Push notification** check box.

     This check box is active if the ServiceNow NowMobile App Screens and Applet Launcher (com.glide.mobile-employee) plugin is activated. The push notification content appears when the check box is active, and you can modify it.

     Push notifications use the ServiceNow Request Application notification device. When a user registers their mobile application to an instance, this notification device is automatically created in their notification preferences. Ensure that this device is active for the users that you want to receive the push notification.
4. Review the message content.
   - For email notifications, review the email subject and email body and modify it if necessary.
   - For push messages, review the message details.
5. Click **Update**.
   The target audience and content configuration changes are saved.
6. To send the notification, click **When to run**.
7. Keep the default mode of **None** and click **Send Notification**.

Result
The notification is sent to the selected audience.

What to do next
Review daily log responses to see who has responded to the notification.

Submit a list of contacts that you interacted with at the workplace

Submit a list of people that you've come into contact with at the workplace to help your organization identify on-site employees who may have been in contact with a potentially exposed coworker.

Before you begin
Role required: sn_imt_checkin.dailylog_user

About this task
If you're among the employees who have returned to the workplace, you receive mobile or email push notifications to submit a list of people that you've come into contact with at the workplace. You can click the link available in the notification to submit the daily contact log.

Procedure
1. Navigate to **All** > **Contact Tracing** > **Daily Contact Log** > **My Daily Contacts**.
2. In the **List of individuals** field, search for and select the employees that you interacted with.
   The **Contact Details** list appears, listing employee names and their email IDs as you select them.

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3. **Optional:** In the **Additional individuals (including visitors, contractors, etc.) and interactions** field, enter the names of other people with whom you interacted during the day.
4. **Optional:** Review the employees that you added in the **Contact Details** list.
   There can be many employees with the same name, but these employees would have a distinct email ID.
5. To remove any wrong selection, click the x next to the employee name in the **List of individuals** field.
6. Click **Submit**.

Submit the daily contact log from a mobile phone

If you receive a mobile push notification to submit the daily contact log, you can submit a list of people that you interacted with on a day.

Before you begin

To receive mobile push notifications, you must have the Now® Mobile app.

Role required: sn_imt_checkin.dailylog_user

Procedure

1. Tap the notification to open the message.
2. In the message, tap **Select People You Met**.
3. Search for and select the employees in the **List of individuals** field.
   The Contact Details list appears listing employee names and their email IDs as you select them.
4. **Optional:** In the **Additional individuals (including visitors, contractors, etc.) and interactions** field, enter the names of other people with whom you interacted during the day.
5. **Optional:** Review the employees that you added to the **Contact Details** list.
   There can be many employees with the same name, but these employees would have a distinct email ID.
6. To remove any wrong selection, click the x next to the employee name in the **List of individuals** field.

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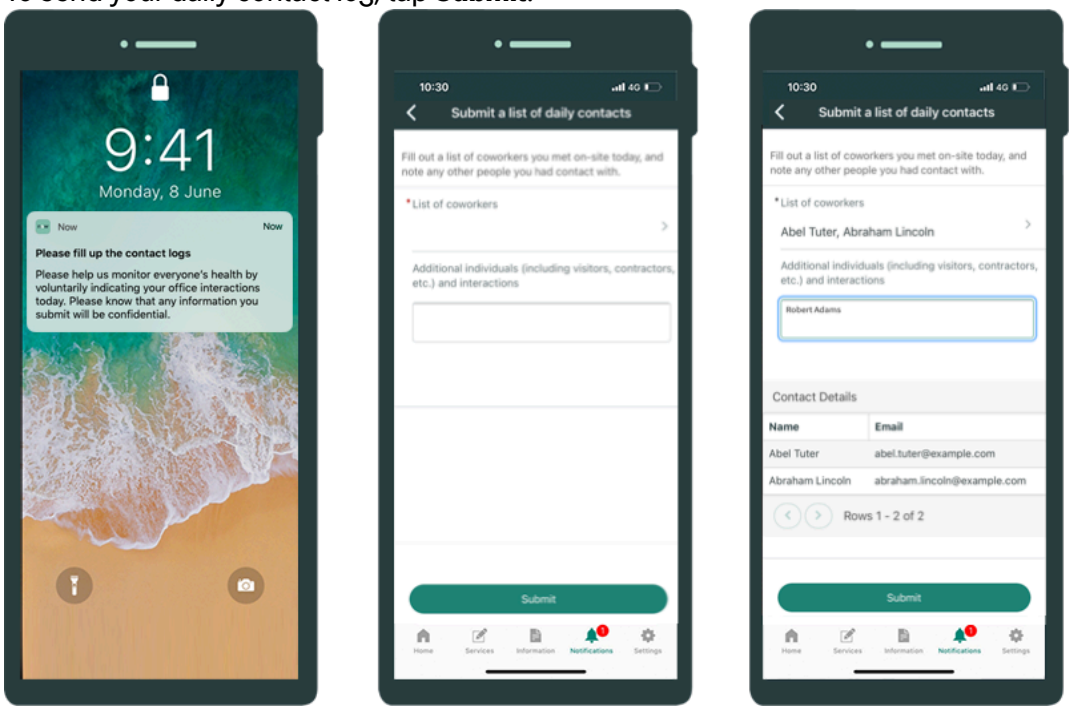
7. To send your daily contact log, tap **Submit**.



Result

After you reply to the notification, a record for your response is updated. Your personal information is secure. Only the staff managing the daily contact logs has access to your response.

Review daily log responses

Review daily contact log responses from employees who received a push notification requesting a list of contacts that they interacted with at the workplace.

Before you begin

Role required: sn_imt_checkin.checkin_admin or sn_imt_tracing.admin

Procedure

Navigate to **All** > **Contact Tracing** > **Daily Contact Log** > **Contact Logs**.
Responses to notifications are listed in the Daily Log Acknowledgements list. Because employees respond to the notification by submitting their daily contact log, their records are updated with their acknowledgement status.

- If employees have responded, the status is **Acknowledged**.
- If employees have not responded yet, the status is **Not Acknowledged**.

The **Notification count** field shows the number of times the notification is sent to the employees who have not yet responded. You can send the notification again only to employees who have not yet responded.

Managing cases to follow up with potentially exposed contacts

When an employee who returns to the workplace is classified as positive for a condition, such as COVID-19, the case manager creates a case to identify and follow up with potentially exposed contacts.

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Run the diagnostic request to identify potentially exposed contacts

The diagnostic request helps you generate a report of all on-site employees who might have been in contact with an affected employee.

If any employee is confirmed to be affected with an infectious disease, send the employee name to the case manager to create a case.

Note: To protect the privacy of the affected employee, you can mark a case as confidential.

Case management process

The case manager sets up a case for an employee who might have been exposed to any infectious disease.

1. Create a case for an affected employee.
2. Run a diagnostic request to identify all potentially exposed contacts through various tracing systems such as workplace location, workplace shifts and reservations, meetings, employee badge swipe data, and Wi-Fi access data. For more information, see Identify potentially exposed users.
3. Send an outreach notification to potentially exposed contacts to notify them of a potential exposure from an affected employee.
4. Create case tasks to follow up with these potentially exposed contacts to assess their health status using predefined survey questions.

Automated case creation

You must have the Emergency Self Report application installed for the automatic case creation to work. For more information, see Set up Emergency Self Report.

If an employee is reported as being in quarantine through the self-reporting option in the Emergency Self Report application, a case is created automatically for the employee. The case is created automatically only if the employee doesn't have any active case at the time of self-reporting.

If the employee has an active case, a work note is added to the case for the case manager to take appropriate action, if needed.

The **Automated Case Creation from Employee Self Report** flow is installed with Contact Tracing. The contact tracing admin can review and configure the base system flow using the Flow Designer.

Automated case task creation on adding a potentially exposed contact

When a case manager adds a potentially exposed contact to a case, a case task is created automatically. By default, these case tasks are assigned to the case manager, and the case manager can assign it to a contact tracer to follow up with the employee.

Note: Case task creation occurs automatically only if the *sn_imt_tracing.auto_create_case_tasks* property is set to **Yes**, the default setting.

The **Create case tasks for exposed contacts** workflow is installed with Contact Tracing. The contact tracing admin can review and modify the base system flow using the Flow Designer.

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Automated SMS outreach delivery to potentially exposed contacts

To take advantage of automatic SMS outreach delivery, you must have Virtual Agent installed and set up for use with SMS and Twilio. For more information on this feature, see Virtual Agent conversations for Contact Tracing.

When a user is added to a case task as a potentially exposed contact, they are automatically sent an SMS notification to answer questions for the Exposure Case Task Survey.

Note: SMS notifications are sent automatically only if the *sn_imt_tracing.enable_sms_exposure_survey* is set to **Yes**. When disabled (the default setting), you can send an SMS survey while working on a case task by clicking the **Send SMS Survey** button.

Potentially exposed contacts visualization

Contact Tracing provides interactive visualization to view the potentially exposed contacts in a case. The visualization enables case managers to quickly evaluate the contact tracing data on a single page. The potentially exposed contacts visualization includes the following options:

- View potentially exposed contacts with the source of exposure graphically
- Drill down to the next level of exposures to quickly identify the severity of the exposure from the affected employee
- Create and view cases and tasks for potentially exposed contacts
- Change the status of the investigation of potentially exposed contacts
- Filter the view by status or source of exposure, or both

View case metrics in ServiceNow Safe Workplace Dashboard

If you have the Safe Workplace Dashboard application installed, you can view the trends of the following data over a given time period for a campus or location:

- Number of active cases
- Number of potentially exposed contacts

For more information, see Safe Workplace Dashboard.

You can also configure the alert type to determine when the number of active cases is above the threshold in a particular campus or location. For more information, see Alert types used with the Safe Workplace Dashboard.

Create a case for an affected employee

As a case manager, create a case for an affected employee to identify and follow up with other employees who might have come in contact with the affected employee.

Before you begin

Role required: sn_imt_tracing.case_manager

About this task

Important: There can be only one active case for an affected employee. You can create a new case for the same employee only if the active case is closed or cancelled.

If the Emergency Self Report application is installed and an employee is reported being in quarantine through the self-reporting option, the system automatically creates a case. If an active case exists for the employee at the time of reporting, a work note is added to that case.

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Procedure

1. Navigate to **All** > **Contact Tracing** > **Case Management** > **Create New Case**.
2. On the form, fill in the fields.

Case form

Field	Description
Reported person	Name of the affected employee.
Location	Location of the affected employee.
Date reported	The date on which the person was reported to be affected.
Reported source	Source from which the employee was reported to be affected, such as through health screening, self-reporting, or location.
Case manager	User assigned to work on the case. Users who have the sn_imt_tracing.case_manager role are listed. **Note:** If a case was automatically created when the employee self-reported as being in quarantine, the case manager field is empty. Case managers can assign the case to themselves or to any other case manager. Only the assigned case manager can work on the case.
Case state	Current state of the case.
Case start date	The date on which the case is created.
Case end date	The date on which the case is closed.
Watch list	Other users who need to know about the status of the case.
Confidential	Option for keeping the case confidential to protect the privacy of the affected user. A confidential case can be accessed only by the case manager and users added in the **Watch list** field.

3. Click **Submit**.

Result

A case for the affected employee is created. If notifications are enabled, the case manager assigned to the case is notified via email.
An exposed contact record is created for the reported person with the default health status set to Infected.

The Exposed contacts visualization section appears.

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The following related lists appear in the case:

- Diagnostics Requests: Used to request a diagnostic report to identify all impacted employees.
- Exposed Contacts: Potentially exposed contacts to follow up with about their health status.
- Case Tasks: The tasks created for each potentially exposed contact to track the follow-up.
- Notes: Notes containing the names of individuals submitted in the daily contact logs by the affected employee during the period specified for the case. If the end date is not specified in the case, all daily log notes submitted by the affected employee after the case start date are listed.

What to do next

Run the diagnostic request to identify all potentially exposed employees and add them to the case for follow-ups.

You can also add potentially exposed contacts to the case manually from the Exposed Contacts related list.

If you have the Safe Workplace Dashboard application installed, you can view a trend of active cases and potentially exposed contacts over a given time period for a campus or location on the dashboard.

Identify potentially exposed contacts

As a case manager, run the diagnostic request to identify other employees who might have come in contact with the affected employee.

Before you begin

The diagnostic request function is available in the Emergency Exposure Management application. Ensure that you have the Emergency Exposure Management application installed.

Role required: sn_imt_tracing.case_manager

About this task

Note: You cannot create or run a diagnostic request for affected employees who have not consented to use their data for contact tracing. For more information, see User privacy consent for Contact Tracing.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Case Management** > **Cases Assigned to Me**.
2. Open a case from the list of assigned cases.
3. If the case is newly assigned to you, click **Start Work**.
   The state of the case updates to Work in Progress.
4. In the Diagnostic Requests related list, click **New**.
   The details of the affected user are pre-populated in the respective fields from the case record.
5. On the Diagnostic Request form, run the diagnostic request on the affected employee to identify other potentially exposed employees, and add them to the case.

   a. Select one or more tracing systems and a date range.

   b. Click **Save**.

   c. Click **Run Diagnostics**.

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The potentially exposed employees, based on the selected tracing systems, are listed in the All Impacted Users related list on the Diagnostic Request form.

d. Select users from the All Impacted Users related list and select the **Add Users to Case** option in the Actions on selected rows list.

For more information on running a diagnostic request, see Run a diagnostic request.

6. **Optional:** If you know of other employees in addition to employees identified from the diagnostics, click **New** in the Exposed Contacts list and add them as potentially exposed contacts.

Result

The selected users from the All Impacted Users related list on the Diagnostic Request form are added to the Exposed Contacts related list on the Case form.
If automatic case task creation is enabled by the *sn_imt_tracing.auto_create_case_tasks* system property setting, a case task is created for each potentially exposed contact added to the case. These automatically created case tasks are assigned to the case manager by default. From the Case Tasks related list, the case manager can assign them to a contact tracer.

Note: If a potentially exposed employee added to the case has an active case, the health status of the employee in the current exposed contact record is automatically set from the corresponding exposed contact record of the active case.

These potentially exposed contacts also appear in the exposed contacts visualization section. For more information, see Working on a case through contact tracing visualization.

If you have the Employee Readiness Core application installed and a health and safety requirement for the potentially exposed contacts activated, a record is created with the requirement status as Not Cleared for these potentially exposed employees.

What to do next

Send notification to potentially exposed contacts in a case.

If the automatic case task creation is disabled, create a case task for each exposed contact.

Send notification to potentially exposed contacts in a case

As a case manager, send an outreach notification to potentially exposed employees to notify them of a potential exposure from an affected employee.

Before you begin

Ensure that your administrator has created an outreach notification that you can send to potentially exposed contacts in the case. To create an outreach notification, the ServiceNow Emergency Outreach application must be installed and active. For more information, see Emergency Outreach.

Role required: sn_imt_tracing.case_manager

Procedure

1. Navigate to **All** > **Contact Tracing** > **Case Management** > **Cases Assigned to Me**.
2. Open a case to send a notification to potentially exposed contacts.
3. In the Exposed Contacts related list, select the employees to whom you want to send a notification.
   If required, you can send a notification to a contact more than once.

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4. In the Actions on selected rows list, select **Send Exposure Notice**.
5. In the Send Exposure Notice dialog box, select an outreach notification, and click **Send**.

Result
An email notification is sent to the selected contacts. The **Notice sent date** column for the selected contacts in the Exposed Contacts list updates to the current date.

You can review the notifications by navigating to **Emergency Outreach** > **View Outreaches** and open the outreach notification.

What to do next
Create a case task for each exposed contact.

Create a case task to follow up with an exposed employee

As a case manager, create case tasks for potentially exposed employees. Assign these tasks to contact tracers to follow up with them to evaluate their health status.

Before you begin
Role required: sn_imt_tracing.case_manager

About this task
The *sn_imt_tracing.auto_create_case_tasks* property, enabled by default, and the **Create case tasks for exposed contacts** workflow cause automatic creation of case tasks when potentially exposed employees are added to a case. If the admin has set the property to *No*, you must add a case task for potentially exposed employees added to a case.

Procedure
1. Navigate to **All** > **Contact Tracing** > **Case Management** > **Cases Assigned to Me**.
2. Open a case to create case tasks for the potentially exposed contacts.
3. In the Exposed Contacts related list, select employees for whom you want to create case tasks.
4. In the Actions on selected rows list, select **Create Task**.
   A task for each selected exposed contact is created and available in the Case Tasks related list. To add a case task for a user not in the exposed contacts list, click **New** in the Case Tasks related list. After creation of the task, the user is added to the Exposed Contacts related list.
5. In the Case Tasks related list, update the following fields:
   a. Double-click the **Due date** field and select the date that the task should be completed by.
   b. Double-click the **Assigned to** field and select a user to work on the task.

      If notifications are enabled, the contact tracers are notified via email.

   Note: To update multiple tasks in the list, click in a field, hold the Shift key, and press the Down Arrow or the Up Arrow key. Press the Enter key to open the list editor and enter appropriate values.

Result
The case tasks are created and assigned to the contact tracers to follow up about the health status of the exposed employees.

What to do next
The contact tracers can start working on the tasks by following up with the exposed contacts about their health status.

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Follow up with potentially exposed contacts

As a case task owner, contact potentially exposed users to follow up on their health status using the predefined instructions and survey questions.

Before you begin

Role required: sn_imt_tracing.contact_tracer

About this task

The case manager defines instructions for contact tracers to use when following up with potentially exposed users, such as the follow-up frequency. Contact tracers should follow these instructions to work on the assigned tasks.
The Exposure Case Task Survey is available for contact tracers to use to assess the health status of the exposed contact. The administrator can review and modify the survey. For more information, see Survey designer.

Procedure

1. Navigate to **All** > **Contact Tracing** > **Case Management** > **Case Tasks**.
2. Open a task from the list.
3. To start work on a newly assigned task, click **Start Work**.
   The state of the case task updates to Work in Progress.
4. Follow up with the potentially exposed contact specified in the **User** field in one of the following ways:
   - Contact the user by calling or sending an email with the questions specified in the survey by clicking **Take Survey**.
   - Send the survey via SMS for the user to respond via SMS by clicking **Send SMS Survey** if available.

     Note: You must have Virtual Agent installed and set up for use with SMS and Twilio to complete SMS outreach delivery. For more information on this feature, see Virtual Agent conversations for Contact Tracing.

   Each follow-up result is added to the Survey results related list.

   Note: These follow-up results can be viewed only by the contact tracer to whom the case task is assigned, the case manager, and the contact tracing admin.

5. Update the final health status of the potentially exposed contact in the **Outcome** field when you complete the required number of follow-ups.
   - If the potentially exposed contact reports positive symptoms of the disease, select **Infected**.
   - If the potentially exposed contact reports normal, select **Cleared**.

   Note: An exposed contact's health status and the **Outcome** field are updated when changes are made to either item. If there are multiple open case tasks for an exposed contact, the health status in all tasks will be updated to match the outcome of the most recently modified case task.

6. Click **Close Task**.

Result

The case task is closed. If notifications are enabled, the case manager is notified via an email.

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What to do next

The case manager can review the closed task and update the health status of the exposed user's as per the outcome value.

Note: The case manager can update the health status of an exposed contact only if there is no active case for the user.

If Employee Readiness Core is installed and the potentially exposed contacts requirement activated, the user's health and safety requirement status is also updated.

After all the case tasks in the case have been closed, the case manager can close the case.

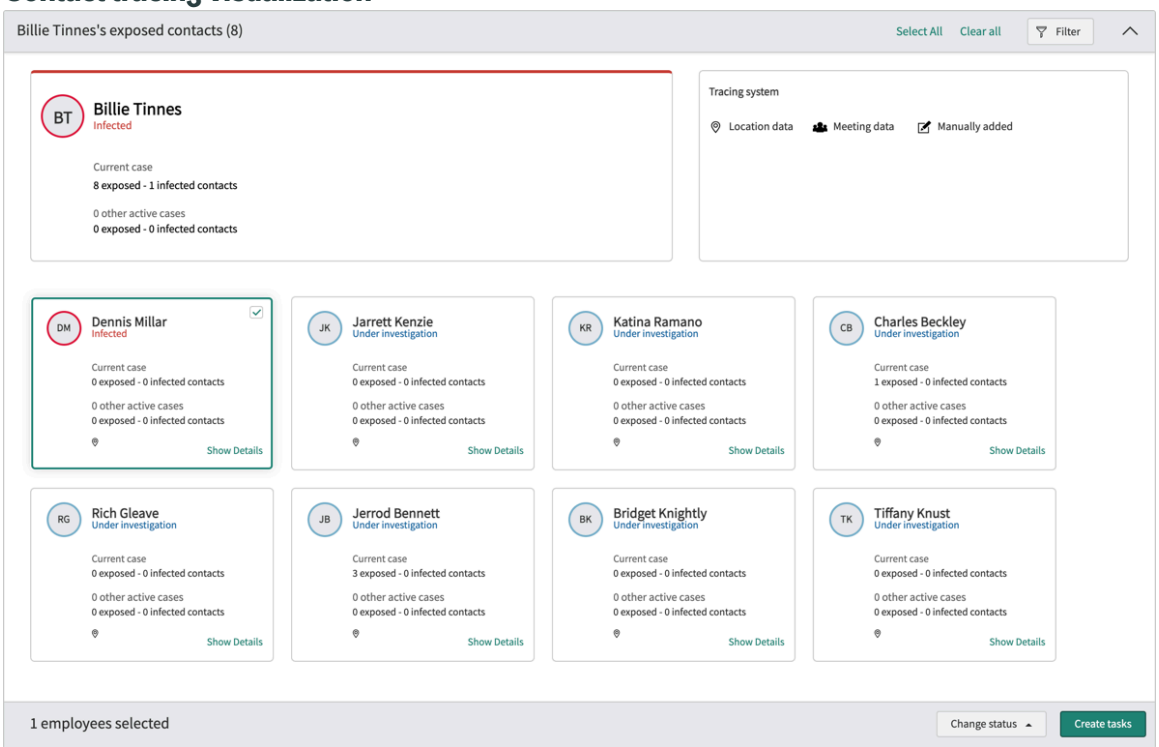
Working on a case through contact tracing visualization

The contact tracing visualization in a case is a graphical representation of the affected user and potentially exposed contacts.

About Contact Tracing Visualization

The contact tracing visualization available on the case form provides multiple options based on the status of the potentially exposed contacts. While working on a case, the case manager can use this visualization to view all potentially exposed contacts added to the case, their status, drill down to the next two levels of potential exposures , and take action as needed.

Contact tracing visualization



Each card represents a potentially exposed contact who might have been potentially impacted by the affected user. You can view how many potentially exposed and infected contacts users have for their current case (where they are the reported person) and the totals for other active cases they are in.

Note: The totals for other active cases do not include numbers from a user's current case.

For example, consider a sample employee's case, Employee A. The employee has five potentially exposed contacts and one of them is infected. One of Employee A's potentially exposed contacts, Employee B, has three potentially exposed contacts from the current case. None of Employee B's contacts are infected. Employee B is also a potentially exposed contact in two

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other cases. Employee B's card provides the total number of potentially exposed contacts in those cases and how many are infected.

To review details about a potentially exposed contact's current case, click **Show Details**. To navigate to cases in which the contact is a potentially exposed contact, click **other active cases**.

Tip: Use the **Filter** option to view a filtered list of cards, such as by status or the source of exposure.

Visualization options

Select a card to view various options on the card based on the status of the exposed contact.

You can change the health status or create case tasks for multiple potentially exposed contacts in one step. Select all cards by clicking **Select All**, or select a few cards by pointing to a card and selecting the check box. Updating the health status of an exposed contact updates their health status and outcome in all open case tasks in which they are included as an exposed contact.

Exposed contacts and available options

Status of the exposed contact	Options available on the card
Under investigation The user is being contacted about the health status.	• View basic details of the user such as email ID and location. • View how many potentially exposed and infected contacts users have for their current case and any other active cases the user is in. • Navigate to a user's other active cases. • Create a task for follow-up. • Create a case. • View potentially exposed contacts who might have been in contact with the selected user.
Infected The user has been classified as positive for a condition, such as COVID-19.	• View basic details of the user such as email ID and location. • View how many potentially exposed and infected contacts users have for their current case and any other active cases the user is in. • Navigate to a user's other active cases. • Create a task for follow-up. • Create a case if no case has been created yet. • View the case if a case has been already created.

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Exposed contacts and available options (continued)

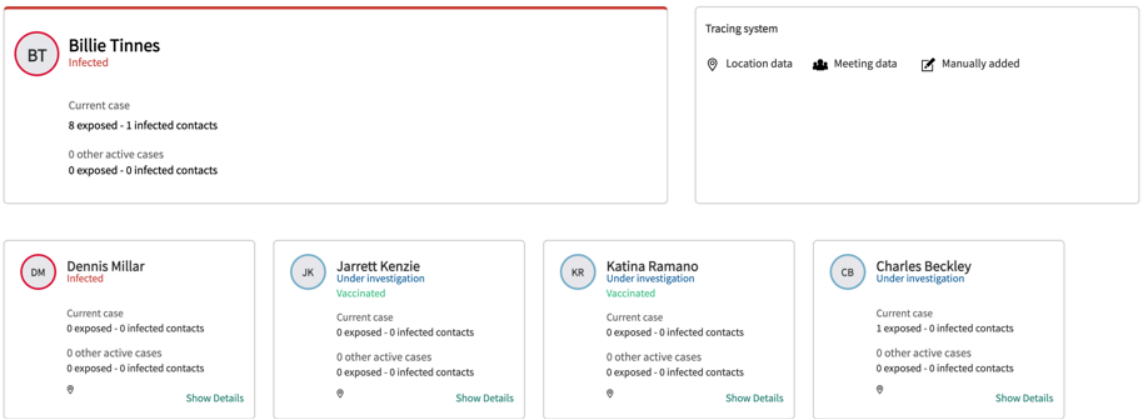
Status of the exposed contact	Options available on the card
	• View potentially exposed contacts who might have been in contact with the selected user. • Change the status.
Cleared The user has been reported safe.	• View basic details of the user such as email ID and location. • View how many potentially exposed and infected contacts users have for their current case and any other active cases the user is in. • Navigate to a user's other active cases. • Create a task for follow-up. • Create a case if no case has been created yet. • Change the status.

Vaccination statuses in contact tracing visualization

Organizations with Contact Tracing and the Vaccination Status application can view vaccination statuses on the **Exposed Contacts** list and contact tracing visualization. The **Vaccinated** label on a card indicates that the user is vaccinated.

For more information, see Configure contact tracing visualization to show vaccination status.

Potentially exposed contacts with Vaccinated status



Contact Tracing visualization Vaccination status features

Feature	Description
Vaccinated status	Case managers with the Vaccination Status sn_imt_vaccine.vaccine_profile_reader role can see the following:

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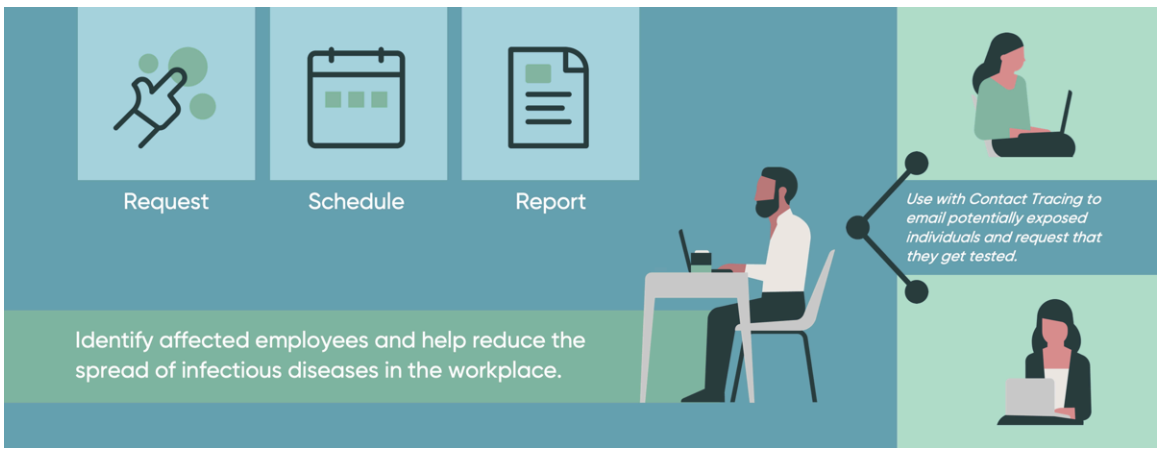
Contact Tracing visualization Vaccination status features (continued)

Feature	Description
	• The **Vaccinated** status that displays for vaccinated contacts. • The **Vaccinated** column appears in the **Exposed Contacts** list with values of **True** or **False**.
Vaccination filter	Case managers with the sn_imt_vaccine.vaccine_profile_reader role can filter exposed contacts based on their vaccination status. In the contact tracing visualization, click **Filter**. Select the **Vaccinated** check box to hide contacts who are not vaccinated. Clear the check box to remove the filter and show all contacts. **Note:** The **Vaccinated** filter is visible to case managers without the sn_imt_vaccine.vaccine_profile_reader role but it does not reveal any vaccination data. Selecting the check box (without the role) hides all contacts as if none of them were vaccinated because the user does not have the necessary permissions to see vaccination statuses.

Health and Safety Testing

Streamline the user health testing process to help organizations reduce the spread of infectious diseases in the workplace.



The ServiceNow® Health and Safety Testing application streamlines the user health testing process to identify affected users and help reduce the spread of infectious diseases in the workplace. It provides organizations, where they are legally required or permitted to use them, with two options: request that users get tested or allow users to request optional health testing upon being notified of potential exposure to an infectious disease, such as COVID-19. Users can submit health testing preferences such as test type and preferred testing date and location.

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Administrators can use the employee request forms to coordinate testing availability and scheduling. After health testing is complete, users can use Health and Safety Testing to provide a test result to satisfy the organization's health and safety requirement, clearing the user for a safe return to the workplace.

Use with other Safe Workplace suite applications

Health and Safety Testing is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.
- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.
- With the Contact Tracing application, evaluate the readiness of your users to return to the workplace by using data such as badge scans, Wi-Fi access logs, and daily contact logs to help identify potential user interactions.

All Safe Workplace suite applications are available in the ServiceNow Store.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

ServiceNow is offering this application to government agencies and their authorized users, not to employees of government agencies in their individual capacities. Use of this application is being offered free of charge for a limited or extended time period and with no expectation of payment from the government agency to ServiceNow for use during that time period, nor does usage create an actual or implied future obligation on behalf of the government. ServiceNow hereby expressly waives any future claims for payment from the agency in connection with usage of the application. Government customers are solely responsible to confirm with the agency's Ethics Office or its authorized representative that acceptance and usage of the application is permissible.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Install Health and Safety Testing

You can install Health and Safety Testing if you have the admin role.

Before you begin

Health and Safety Testing requires the ServiceNow® Employee Readiness Core application.

The ServiceNow® Contact Tracing application can optionally be installed to send an email notification to employees who are potentially exposed individuals in a contact tracing case. The notification informs the employee of the potential exposure and provides them with a link to request testing.

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The ServiceNow® Emergency Response Management for Now Mobile application can optionally be installed to add a **Health** tab to the Now Mobile app where employees can request testing or report a test result.

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Health and Safety Testing`.
3. Click **Install**.

   The Application installation dialog box opens.
4. Click **Activate**.

Components installed with Health and Safety Testing

Several types of components are installed with Health and Safety Testing, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Health and Safety Testing admin [sn_imt_health_test.admin]	Application-specific admin for Health and Safety Testing. **Important:** By default, the System Administrator [admin] role contains the sn_imt_health_test.admin role. The sn_imt_health_test.admin role should be reassigned to another user and then removed from the admin. This process protects sensitive application data by restricting access to the application.	sn_imt_health_test.testing_admin
Health testing manager [sn_imt_health_test.testing_admin]	Can view and manage health testing requests, results, providers, and test types.	None

Tables installed

Table	Description
Provider [sn_imt_health_test_provider]	Health providers that your organization uses for COVID-19 diagnostic testing.
Test Request	Test requests submitted by users. Users can review their test requests in **My test requests**.

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Table	Description
[sn_imt_health_test_request]	
Test Result [sn_imt_health_test_result]	Test results submitted by users. Users can review their test results in **My test results**. Managers can review the test results of their direct reports in **My Employee's Test Results** if enabled by their organization. For more information, see Configure Health and Safety Testing.
Test Type [sn_imt_health_test_type]	Types of testing offered by providers. The options are **At a facility** and **Self-administered**. You can create additional test types if necessary.

Configure Health and Safety Testing

Complete all configuration tasks to ensure that Health and Safety Testing is set up correctly for your company.

Set up Health and Safety Testing properties

Set up Health and Safety Testing properties to define the data retention period for health testing data and enable or disable emails to potentially exposed individuals.

Before you begin

Role required: sn_imt_health_test.admin

Procedure

1. Navigate to **All** > **Health and Safety Testing** > **Properties**.
2. Set the following property values.

Property	Description
Health and Safety Testing data retention period (in days). [sn_imt_health_test.data_retention_period]	Sets the number of days that da COVID-19 diagnostic test reques and results is available in the sy before it is deleted automatically The *Data Retention Job* *Health and Safety Test* scheduled job runs daily to dele records that have an updated da the specified retention period.

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Property	Description
	Note: When an employee's results are deleted, their hea and safety requirement statu is reset to the default status **Testing Requirement Satisf** If the employee is a potentia exposed individual in a cont tracing case, their health an safety requirement status is reset to **Not Cleared** until th submit a negative test result more information about hea and safety requirements, se Employee Health and Safety Status.
Send email to potentially exposed individuals asking them to submit a test request. [sn_imt_health_test.notify_potentially_exposed]	When enabled, an email notifica sent to employees who are pote exposed individuals in a contact case and have a health status of **investigation**. The notification in the employee of the potential ex and provides them with a link to testing.
Use country-specific data retention policy for Health and Safety Testing. [sn_imt_health_test.use_country_specific_data_retention_policy]	Enable this property to use coun specific data retention policies f Health and Safety Testing. When enabled, records are compared the data retention policy of the u location to determine how long r are retained. For example, one country may ha 90 day retention period while an has a 120 day policy. When there is no country-specif policy, the policy defaults to the in the **Health and Safety Testing retention period (in days)** prope This property is inactive by defau
Message auto-created in work notes when test result is positive. [sn_imt_health_test.positive_result_message]	Create the message automatical generated in the work notes for u read when a test result is positiv as advice to self-quarantine or n members of their household tha tested positive.
Prevent admin from accessing attachments [sn_imt_health_test.prevent_admin_access_to_attachments]	Enable this property to ensure th only scoped administrators can attachments submitted by users reported vaccinations. This prev

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Property	Description
	system administrators from view these attachments. The property inactive by default.
Allow managers the ability to update health test results [sn_imt_health_test.allow_managers_ability_to_update_test_result_records]	Enable this property to provide all managers with the ability to review and update the reported health tests of their direct report in the Approval Portal. All manag receive the Approval Portal man [sn_imt_core.approval_portal_m role. This property is inactive by **Note:** If this property is not enabled, managers can acc employee records in the Tes Result table.

3. Click **Save**.

Configure country-specific data retention settings for Health and Safety Testing

Configure the data retention settings for Health and Safety Testing so that the data-retention policy is country-specific.

Before you begin
Role required: sn_imt_core.admin, sn_imt_health_test.admin, or sn_imt_vaccine.admin

About this task
Employers remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Employers' specific requirements.

The **Health and Safety Testing data retention period (in days)** property sets the number of days that COVID-19 diagnostic test requests and results are available before they are deleted automatically. The *Data Retention Job for Health and Safety Testing* scheduled job runs daily to delete records that have an updated date past the specified retention period.

Enable the **Use country-specific data retention policy for Health and Safety Testing** property and use the Data Retention module in Employee Health and Safety Status to define policies at the country-level.

Procedure

1. Navigate to **All** > **Health and Safety Testing** > **Properties**.
2. Set the *Use country-specific data retention policy for Health and Safety Testing* to **true**.
3. Click **Save**.
4. Generate location policies for Health and Safety Testing.

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a. Navigate to **Employee Health and Safety Status** > **Data Retention**.

b. Click **Generate Location Policies**.
The default number of days is based off the value in the **Health and Safety Testing data retention period (in days)** property.

5. Open the location policy that you want to modify.
6. In the **Retention period (in days)** field, enter the number of days that you want to retain data for.
7. Click **Update**.

Result
When the *Data Retention Job for Health and Safety Testing daily* scheduled job completes or is manually executed, the data for users in those locations have their COVID-19 diagnostic test requests and results retained or deleted based on their country's data retention policy.

Add COVID-19 test providers

Create a list of COVID-19 diagnostic test providers that your company uses to schedule testing for employees.

Before you begin
Role required: sn_imt_health_test.testing_admin

Procedure
1. Navigate to **All** > **Health and Safety Testing** > **Providers**.
2. Click **New**.
3. On the form, fill in the fields.

Provider form

Field	Description
Company	The company providing COVID-19 diagnostic tests.
Supported test types	The types of testing offered by the provider. The options are **At a facility** and **Self-administered**. You can create additional test types if necessary.

4. Click **Submit**.

What to do next
When an employee submits a request for testing, use the list of providers to schedule the test according to the employee's preferred test type and location.

Customize the notification for potentially exposed individuals

Modify the notification email that is sent to potentially exposed individuals to customize the notification for your company.

Before you begin
Role required: admin and sn_imt_health_test.admin

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About this task

The **Potentially exposed health test request** notification is sent to employees who are potentially exposed individuals in a contact tracing case and have a health status of **Under investigation**. The notification informs the employee of the potential exposure and provides them with a link to request testing. The notification is only used when the *sn_imt_health_test.notify_potentially_exposed* property is enabled.

By default, the notification uses a ServiceNow® banner and a placeholder signature. Update the notification to use your company logo and signature.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Click the **Potentially exposed health test request** notification.
3. To view the default notification, click **Preview Notification**.
4. Navigate to the **What it will contain** form section.
5. In the **Message HTML** field, click **Insert/edit image** and select your banner image.

   Tip: The image must be added before the mail script so that it appears at the top of the email.

   If you don't already have an email banner image in your ServiceNow instance, you can upload an image to use. For instructions, see Upload one or more images.
6. Click the **Show Notification Scripts** related link.
7. In the **Script** field, the code `template.print(util.getEmailCompanyLogo());` adds the default ServiceNow® banner to the email.
   Comment out or delete this line of code to remove the ServiceNow® banner.
8. In the **Script** field, replace `You can expect [these next outreach steps]` with the next steps that you want to communicate to employees.
9. In the **Script** field, replace `The Site Safety Team` signature with your preferred signature.
10. **Optional:** If you would like to make any other changes to the email notification, update the **Script** field as needed.
11. Click **Update**.
12. Return to the notification record and click **Preview Notification** to confirm your changes.

Set up privacy consents for Health and Safety Testing

Set up privacy consents for users who are providing health and safety testing data to your company.

Before you begin

Role required: sn_imt_core.admin

About this task

Users must agree to a privacy policy in order to be able to request or report diagnostic data. They also must have the sn_imt_core.privacy_consent_user role.

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Procedure

1. Customize the privacy consent template.
   a. Navigate to **Employee Health and Safety Status** > **Privacy Consent Templates** and click **Testing Consent Template**.
   b. Fill in the placeholder text with the name of your company and contact information.
   c. Click **Update**.
2. Assign the sn_imt_core.privacy_consent_user role to all users who will be requesting and reporting diagnostic test results.
   This role allows users to complete the privacy consent.
3. Generate the location-based privacy configurations for the locations in your instance.
4. Configure an outreach to send the privacy consent to users.
   a. Navigate to **Emergency Outreach** > **View Outreaches** and click the **Health and Safety Testing Diagnostic Test Placeholder** outreach.
   This outreach is preconfigured to use the Health and Safety Testing Diagnostic Test Placeholder Audience Record and the Testing Consent Template.
   b. Make any modifications to the outreach if needed, such as scheduling a time to send.
   For more information, see Send notifications for an emergency.
   c. **Optional:** Enable the outreach to provide location-specific privacy consents by selecting the **Use Country** option on the **Content configuration** tab.
   When enabled, the privacy statement text in Location Privacy Configuration takes precedence over text in the privacy consent templates. This text is used for the outreach, system notification email, and push notification. If you need to update the text that users receive, you must change the location's privacy statement.
   d. Click **Update**.

Result

Users can request and report diagnostic test results. Users that attempt to request a test are automatically added to the Health and Safety Testing Diagnostic Test Placeholder Audience Record about every 10 minutes. These users will also receive the notification around that time.

Request a COVID-19 diagnostic test

Request a COVID-19 diagnostic test if you have been potentially exposed, are having symptoms, or want testing for another reason.

Before you begin

Role required: sn_imt_core.privacy_consent_user

About this task

You must agree to a user privacy consent when you request a COVID-19 diagnostic test.

Procedure

1. Navigate to **All** > **Health and Safety Testing** > **Set up a COVID-19 diagnostic test**.

   Note: To request testing in the Now Mobile app, navigate to **Health** > **Follow These Safety Practices** > **COVID-19 Testing** > **Set up a COVID-19 diagnostic test**.

2. On the form, fill in the fields.

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Set up a COVID-19 diagnostic test form

Field	Description
Preferred test type	The type of COVID-19 diagnostic test that you would like to take.
Preferred test date and time	The date and time that you would like to take your COVID-19 diagnostic test. This field appears only when **At a facility** is selected from **Preferred test type**.
Use a provider near me (please enter your address or city)	Your address or city. This field appears only when **At a facility** is selected from **Preferred test type**. Your company's health testing managers will use this address to find a test provider that is near you.
Reason for test	The reason that you are requesting a COVID-19 diagnostic test. The options are **Having symptoms**, **Potential exposure**, **Prefer not to say**, and **Other**.
Shipping address	The address that you want your test kit to be shipped to. This field appears only when **Self-administered** is selected from **Preferred test type**.

3. Click **Submit**.

Result
Your company's health testing managers use your request to schedule a COVID-19 diagnostic test for you. You will receive an email from your company or the test provider with instructions and information about the test.

What to do next
When you receive your test result, you can choose to report the result to your company. For instructions, see Report your COVID-19 diagnostic test result.

Report your COVID-19 diagnostic test result

If you would like to provide your company with an update on your health status, report your COVID-19 diagnostic test result.

Before you begin
Role required: sn_imt_core.privacy_consent_user

About this task
You must have agreed to a user privacy consent in order to be able to report your COVID-19 diagnostic test results.

Procedure

1. Navigate to **All** > **Health and Safety Testing** > **Report a COVID-19 diagnostic test result**.

   Note: To report your test result in the Now Mobile app, navigate to **Health** > **COVID-19 Testing** > **Report a COVID-19 diagnostic test result**. If the **Health** tab is not available, find **COVID-19 Testing** under **More** instead.

2. On the form, fill in the fields.

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Report a COVID-19 diagnostic test result form

Field	Description
Related test request	The test request that you submitted to schedule testing.
Test result	Your test result. The options are **Positive result**, **Negative result**, and **Inconclusive**.
Date you received the result	The date that you received your test result.

3. Click **Submit**.

Review your health test results

If you would like to review your recently reported COVID-19 diagnostic test result or add an attachment to a health test, access your previous test results.

Before you begin

Role required: sn_imt_core.privacy_consent_user

Procedure

1. Navigate to **All** > **Health and Safety Testing** > **My test results**.
2. Select the test results that you would like to modify or review.
3. Modify the record by adding an attachment or review the record.
   - If you are adding an attachment, such as test results, add the attachment and then click **Update**.

     Note: For information on managing attachments, see Manage attachments.
   - If you are reviewing the record, review the record and click **Back** to return to the list of test results.

Confirm COVID-19 test results for a user

Confirm a user's reported COVID-19 test results through the Employee Readiness Core Approval Portal.

Before you begin

Your organization must install both Health and Safety Testing and Vaccination Status to use the Approval Portal.

- For information on installing Health and Safety Testing, see Install Health and Safety Testing.
- For information on installing Vaccination Status, see Install Vaccination Status.

Activate the *sn_imt_health_test.allow_managers_ability_to_update_test_result_records* property to enable all managers to review and verify COVID-19 tests of their direct reports. This property assigns the sn_imt_core.approval_portal_manager role to managers and grants access to the Approval Portal for test results.

For more information, see Set up Health and Safety Testing properties.

Role required: sn_imt_vaccine.admin, sn_imt_core.approval_portal_manager, or sn_imt_core.health_and_safety_approver

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Role required: sn_imt_vaccine.admin

About this task

Managers can only confirm the COVID-19 test results of their direct reports. Vaccine admins and health and safety approvers can confirm the test results of all users.

Procedure

1. Navigate to **Employee Health and Safety Status** > **Approval Portal**.
   The default view displays all health test, vaccine dose, and exemption request records that require review.
2. **Optional:** Filter the results.
   - Change which record types are displayed by selecting a record type from the **Record** field list.
   - Change how the records are sorted by selecting a value from the **Sort** field list.
3. Search for the user whose health test you want to approve or deny.
   The search behavior for the Approval Portal is a *starts with* search.
4. Select the record to review the information included in the health test modal and any attachments.

Health test modal

Field	Description
Test review outcome	The status of the health test review.
Related test request	The test request record the health test is related to.
Test result	The results of the test, such as positive or negative.
Date you received the result	The date test results were received.
COVID test result verified by	The person who verified the COVID-19 test result.
Work notes	A log of work notes included for tracking purposes.

5. **Optional:** Add additional information to the record through work notes and click **Save**.
   The ability to add work notes is unavailable to managers.
6. Approve or reject the user's health test results.
   - To approve the user's health test results, select **Approve**.
   - To reject the user's health test results, select **Deny**.
7. Click **Verify** to verify the user's test results.

Result

- The record is moved to the **Approved** or **Denied** tab.
- The **COVID test result verified by** field in the user's test result record is updated with your name to confirm you verified the result.
- In the user's vaccine profile, the **Most recent COVID test result verified** option is selected.

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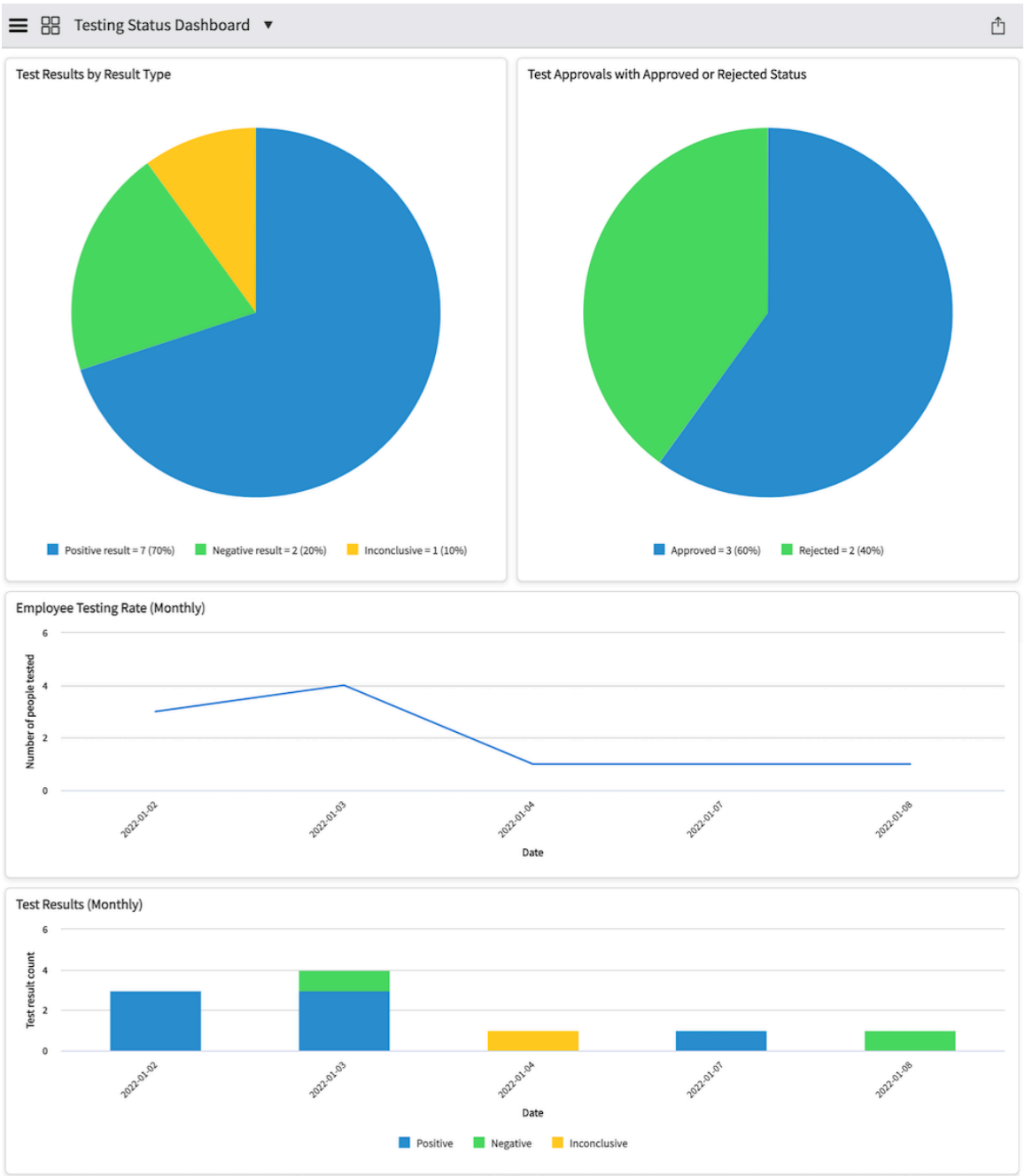
Health and Safety Testing dashboard

Use the Health and Safety Testing dashboard to gain insight on the health of your users with reports detailing testing trends, the types of tests performed, and approvals.

To access the Health and Safety Testing dashboard, navigate to **Self-Service** > **Dashboards**.



End user and goals

End user and goal	Required role	Benefits
Health and Safety Testing manager or administrator: Needs an overview of the organization's testing status. They might want	• Administrator: sn_imt_health_test.admin • Manager: sn_imt_health_test.testing_admin	• Review the number of health test results by type • Monitor and compare the number of test results that

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End user and goal	Required role	Benefits
to see the frequency of tests, the number of results being reported each month approved, the authenticity of the tests, and what types of tests are being reported.	• (Optional) sn_imt_core.admin **Note:** The sn_imt_core.admin role is not required but users with that role can review some of the reports. Users with only the sn_imt_health_test.testing_admin role are unable to view the Test Results by Result Type and Test Approvals with Approved or Reject Status reports	have been approved or rejected • Monitor your organization's monthly testing rate • Monitor the monthly number of test results reported
Employee Readiness Core admin: Needs an at-a-glance view of the organization's testing rate and the number of results reported to help determine employee readiness.	sn_imt_core.admin	• Monitor your organization's monthly testing rate • Monitor the monthly number of test results reported

Data visualizations

Title	Type	Description
Test Results by Result Type	Pie breakdown	A breakdown of the test results in your organization by the result (positive, negative, and inconclusive).
Test Approvals with Approved or Rejected Status	Pie breakdown	The number of test results in your organization that have been either approved or rejected.
Employee Testing Rate (Monthly)	Line	Testing rate of users in your organization for the month.
Test Results (Monthly)	Stacked bar chart	The monthly number of test results reported (positive, negative, and inconclusive).

Employee Readiness Core

Use the ServiceNow® Employee Readiness Core application to track employee data across all Safe Workplace suite and ServiceNow® Emergency Response Management applications.

The Employee Readiness Core app adds the Employee Health and Safety Status feature.

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The Employee Readiness Core app also provides shared functionality and data structures for Employee Readiness apps, such as ServiceNow® Employee Readiness Surveys, ServiceNow® Employee Health Screening , and ServiceNow® Contact Tracing .

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup .

Use with other Safe Workplace suite applications

Employee Readiness Core is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.
- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.
- With the Contact Tracing application, evaluate the readiness of your users to return to the workplace by using data such as badge scans, Wi-Fi access logs, and daily contact logs to help identify potential user interactions.

All Safe Workplace suite applications are available in the ServiceNow Store .

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
	or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

ServiceNow is offering this application to government agencies and their authorized users, not to employees of government agencies in their individual capacities. Use of this application is being offered free of charge for a limited or extended time period and with no expectation of payment from the government agency to ServiceNow for use during that time period, nor does usage create an actual or implied future obligation on behalf of the government. ServiceNow hereby expressly waives any future claims for payment from the agency in connection with usage of the application. Government customers are solely responsible to confirm with the agency's Ethics Office or its authorized representative that acceptance and usage of the application is permissible.

All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Install Employee Readiness Core

You can install Employee Readiness Core if you have the admin role.

Before you begin

Employee Readiness Core version 1.1.0 and later requires the following plugins.

- ServiceNow Integration Hub Runtime (com.glide.hub.integration.runtime)
- Workflow Studio Action Step - Payload Builder (com.glide.hub.action_step.payload)
- ServiceNow Integration Hub Action Step - REST (com.glide.hub.action_step.rest)

These plugins must be requested through the Now Support Service Catalog. For instructions, see Request a plugin.

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Employee Readiness Core`.
3. Click **Install**.

   The Application installation dialog box opens.
4. **Optional:** Load the demo data by selecting the **Load demo data** check box.

   (Optional) For information about how to install or reinstall demo data after the initial installation, see the Work around to install demo data if application is already installed [KB0722909] article in the Now Support Knowledge Base.
5. Click **Install**.
6. When the installation is complete, click **Close**.

Components installed with Employee Readiness Core

Several types of components are installed with Employee Readiness Core, including user roles, tables, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Roles installed

Role title [name]	Description	Contains roles
Employee Readiness Core admin [sn_imt_core.admin]	Can create and manage health and safety users, health requirements, privacy consent templates and policies, and Safe Workplace audiences. Can read non-required health and safety records.	• sn_imt_core.reader • flow_operator • sn_imt_core.privacy_consent_user • sn_imt_core.safe_workplace_audience_adm
Employee Readiness Core reader [sn_imt_core.reader]	Can view health and safety requirement statuses in the View Employee and Visitor Status module.	None
Safe Workplace audience admin [sn_imt_core.safe_workplace_audience_admin]	Can create and manage Safe Workplace audiences. Can read non-required health and safety records.	None
External web service user [sn_imt_core.api_logging_user]	External service user that can make table API calls to insert log entries.	None
Privacy consent user	Can submit and update the user	None

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Role title [name]	Description	Contains roles
[sn_imt_core.privacy_consent_user]	privacy consent for themselves.	
Health and safety approver [sn_imt_core.health_and_safety_approver]	Can review the requests and responses of all users in the Approval Portal such as vaccine exemption requests, vaccine responses, and health test results.	None
Approval Portal manager [sn_imt_core.approval_portal_manager]	Can review the requests and responses of their direct reports in the Approval Portal when the appropriate application-specific property is enabled for the corresponding record type. For example, you can enable a property in Vaccination Status to allow managers to review vaccine responses.	None

Tables installed

Table	Description
Health and Safety User [sn_imt_core_health_and_safety_user]	List of users and visitors and their progress toward completing all applicable active requirements.

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Table	Description
Health and Safety Requirement [sn_imt_core_health_and_safety_requirement]	List of all health and safety requirements.
Employee Health and Safety Requirement [sn_imt_core_employee_health_and_safety_requirement]	List of user and visitor statuses for all active requirements.
Health and Safety Visitor [sn_imt_core_visitor]	List of visitors.
Health and Safety Visitor Invitation [sn_imt_core_visitor_invitation]	List of visitor invitations, including information about their reason for visiting and the location they are invited to visit.
Location Privacy Configuration [sn_imt_core_location_privacy_configuration]	Configuration for the location-based privacy policy, such as the privacy statement for a location and whether a particular location requires privacy consent.
Privacy Consent Template [sn_imt_core_privacy_consent_template]	Template for storing the privacy statement for a location that is used in the location privacy configuration.
User Privacy Notice and Consents [sn_imt_core_user_privacy_notice_and_consent]	Responses of employees to the privacy consent.
Safe Workplace Audiences [sn_imt_core_safe_workplace_audience]	Collections of users based on one or more criteria, such as groups, departments, and locations. Use Safe Workplace audiences to organize lists of users for sending outreach notifications.
Data Retention Policies [sn_imt_core_data_retention]	Configuration for country-specific data retention policies for Health and Safety Testing and Vaccination Status. Users with the sn_imt_core.admin, sn_imt_health_test.admin, or sn_imt_vaccine.admin roles can configure these policies.

Scheduled jobs installed

Scheduled job	Description
Mark expired user requirements as not_cleared	Runs every 30 minutes to update user requirement statuses to **Not Cleared** if they have exceeded the time limit they are valid for.

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Scheduled job	Description
	Note: The scheduled job only runs for requirements that have the **Use duration** field selected.
Collect Safe Workplace users	Runs weekly to create health and safety user records for users [sys_user] with activity or an assigned role in any of the following Safe Workplace suite and Emergency Response Management applications. • Contact Tracing • Emergency Outreach • Employee Health Screening • Employee Readiness Core • Employee Travel Safety • Health and Safety Testing • Safe Workplace Dashboard • Vaccination Status • Workplace PPE Inventory Management • Workplace Core Health and safety user records are also created for visitors who are invited through the Employee Readiness Core app.
Recalculate audiences for requirements	Runs every hour to recalculate audiences for health and safety requirements when users are added or removed from the audience. This job handles when their status would be changed to or from **Not Required** due to their status in or out of an audience.
Recalculate All Employee Health and Safety Requirement Status'	A scheduled job that can be run as a one-time fix script once your organization provides users with their relevant roles and upgrades to the latest version of Employee Readiness Core. This job recalculates each users' Healthy and Safety requirement statuses based on the [sn_imt_core.use_not_required] property and their requirements.
Ensure Approval Portal Manager	Runs weekly by default or may be manually executed to ensure managers are assigned or unassigned the Approval Portal manager [sn_imt_core.approval_portal_manager] role based on whether they are currently a manager and one of three Approval Portal-related properties are active. • Allow managers the ability to update health test results [sn_imt_health_test.allow_managers_ability_to_update_test_result_records] • Allow managers the ability to update vaccine response records [sn_imt_vaccine.allow_managers_ability_to_update_vaccine_response_records] • Allow managers the ability to update vaccine exemption requests [sn_imt_vaccine.allow_managers_ability_to_update_vaccine_exemption_records] Each property provides managers access to the Approval Portal, however, managers are able to see and interact with only records associated with the activated property. Activating multiple properties grants additional capabilities to the reviewing managers.

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Employee Health and Safety Status

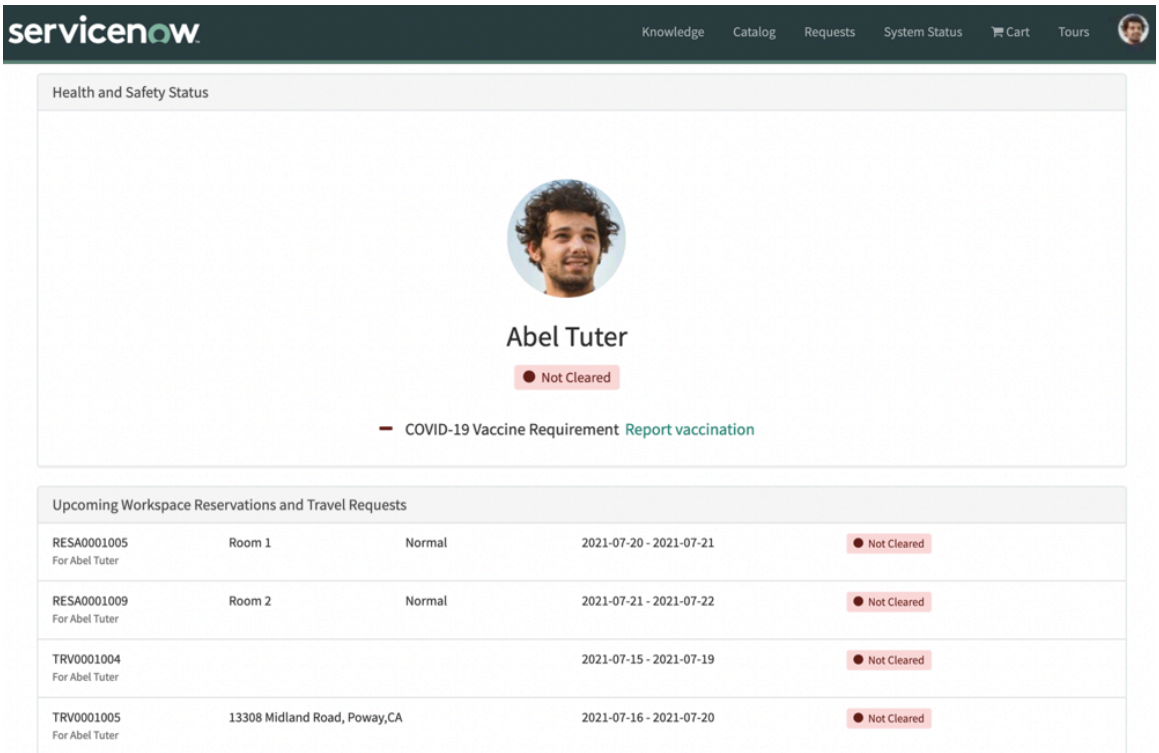
Use the Employee Health and Safety Status feature to track when people are ready to return to the workplace.

Pull data across all Safe Workplace suite and Emergency Response Management applications into a single data point that shows if a user is ready to return to the workplace or travel.

Create and activate requirements that users must fulfill before they can return to the workplace or complete travel to various locations. The requirements can be based on data from any of the Safe Workplace suite and Emergency Response Management applications. When a user fulfills all active requirements, they are ready to return to the workplace.

Due to the ability to set different health and safety requirements for different locations, a user might be cleared for their current travel or location but not for a specific location. For example, a user might be cleared for an active reservation but not travel to a campus across their country.

Note: If a user has an active travel and active reservation, that reservation takes precedence.



Set up Employee Health and Safety Status properties

Set up Employee Health and Safety Status properties to configure the email notifications that are sent to visitors.

Before you begin

Role required: sn_imt_core.admin

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Properties**.
2. Set the following property values.

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Property	Description
sn_imt_core.send_email_to_visitor	When enabled, the **Notify about scheduled visit** email notification is sent to the visitor when an employee invites them to the workplace. The email is sent immediately after the employee submits the invitation. The email contains a brief confirmation of the scheduled visit, including information about the date of the visit and the name of the employee who invited them.
sn_imt_core.days_to_ask_for_health_data	Sets the number of days before the scheduled visit that the **Ask for health related data from visitor** email notification is sent to the visitor. The email contains information about safety requirements and policies that the visitor must agree to follow. The visitor must respond `Yes` to the email to complete the Visitor Invitation Requirement.

For more information about the email notifications used by the properties, see Modify visitor notification emails.

3. Click **Save**.

Create health and safety user records

Create health and safety user records to track requirement statuses for all employees and visitors.

Before you begin

If the ServiceNow® Customer Service Management (CSM) application is activated, you can also create health and safety user records for consumers and contacts.

Role required: sn_imt_core.admin

About this task

Health and safety user records are automatically created for users [sys_user] with activity or an assigned role in any of the following Safe Workplace suite and Emergency Response Management applications.

- Contact Tracing
- Emergency Outreach
- Employee Health Screening
- Employee Readiness Core
- Employee Travel Safety
- Health and Safety Testing
- Safe Workplace Dashboard
- Vaccination Status
- Workplace PPE Inventory Management
- Workplace Core

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Health and safety user records are also created for visitors who are invited through the Employee Readiness Core app.

Some users might not have activity or assigned roles in the apps, so health and safety user records are not automatically created for them. If you want to view the requirement status for these users, you can manually create health and safety user records for them.

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Health and Safety Users**.
2. Click **New**.
3. In the **type** field, select **Visitor** or **Employee**.

   Note: If you're creating a health and safety user record for a CSM consumer or contact, select **Employee**.

4. Select a value in the **User** or **Visitor** field.
   - If you're creating a record for an employee, consumer, or contact, select the user in the **User** field.
   - If you're creating a record for a visitor, select the visitor in the **Visitor** field.
5. Select a value in the **Working location type** field.
   - If the user is reporting to your organization on-site full time, select **Full time on-site**.
   - If the user is reporting to your organization remotely full time, select **Full time remote**.
   - If the user is reporting to your organization part time remote and part time on-site, select **Part time remote**.
6. Click **Submit**.
   The **Requirement status** field is read-only and is updated after you submit the record. The user or visitor is added to the Health and Safety User table [sn_imt_core_health_and_safety_user]. A record is created for the user or visitor in the Employee Health and Safety Requirement table [sn_imt_core_employee_health_and_safety_requirement] for each active requirement using the default status for the requirement.

What to do next

You can view all health and safety user records by navigating to **Employee Health and Safety Status** > **Health and Safety Users**. The **Requirements status** column shows the user's or visitor's progress towards completing all active requirements. The value is **Cleared** if they have fulfilled all active requirements. The value is **Not cleared** if they are missing any requirements.

You can also look up the requirements status for individual users or visitors by navigating to **Employee Health and Safety Status** > **View Employee and Visitor Status**. The status page can be used during the health screening process for entry to a location. For more information, see Conduct a health screen for entry.

Activate a health and safety requirement

Activate requirements to track when employees are ready to return to the workplace or to safely travel to another site. You can also activate requirements that visitors must complete before entering the workplace.

Before you begin

Role required: sn_imt_core.admin

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About this task

Use health and safety requirements to define the requirements that employees must fulfill before they can return to the workplace, safely travel to another site , or that visitors must fulfill before entering the workplace. Employee Readiness Core includes pre-built requirements. For more information, see Included health and safety requirements.

Requirements are not active by default. A requirement must be activated before you can track whether employees or visitors have fulfilled the requirement.

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Health and Safety Requirements**.
2. Click the requirement that you want to activate.

   Note: Pre-built requirements provided by Employee Readiness Core are ready to activate without any modifications. However, you can choose to edit them to meet your company's needs. For example, you can edit the **Use duration** and **Valid for** fields to adjust the amount of time a requirement status is valid for. You can also select the **Actionable** check box to add a link for employees to complete the requirement on the Health and Safety Status page. If you're activating a custom requirement, make sure that you select a flow in the **Requirement flow** field. You must also select a table and conditions in the Include previous applicable records section. You can't activate the requirement unless these fields are populated.

3. Click **Activate**.
   After the requirement is activated, health and safety user records are created for employees or visitors who have activity for the requirement. Health and safety user records are also created for employees or visitors who have activity for the requirement before it was activated.

What to do next

You can view all health and safety user records by navigating to **Employee Health and Safety Status** > **Health and Safety Users**. The **Requirements status** column shows the employee's or visitor's progress towards completing all active requirements. The value is **Cleared** if the employee or visitor has fulfilled all active requirements for their current location. The value is **Not cleared** if the employee or visitor is missing any requirements.

You can also look up the requirements status for individual employees or visitors by navigating to **Employee Health and Safety Status** > **View Employee and Visitor Status**. The status page can be used during the employee or visitor health screening process for entering the workplace. For more information, see Conduct a health screen for entry and Screen a visitor for entry to the workplace .

Create a health and safety requirement

Create requirements to track when employees are ready to return to the workplace or visit a site. You can also create requirements that visitors must complete before entering the workplace.

Before you begin

Role required: sn_imt_core.admin

About this task

Use health and safety requirements to define the requirements that employees must fulfill before they can return to the workplace, or that visitors must fulfill before entering the workplace. Create separate requirements for employees and visitors. A requirement must apply to either employees or visitors, not both. Employee Readiness Core provides some pre-built requirements. However, you can create additional requirements using data from any of the Safe Workplace suite or Emergency Response Management apps.

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Health and safety requirements are built with Flow Designer. Before creating a requirement, make sure that you're familiar with the basics of ServiceNow® Workflow Studio.

The following steps show how to create a requirement using the pre-built Employee Health Verification Requirement as an example.

Procedure

1. In Workflow Studio, create an action to check the requirement status for an employee or visitor.

   a. Create an action.

   b. Save the action in the Employee Readiness Core application.

   c. In the Inputs section of the Action Outline, create an input for the type of record that you will use to check if the employee or visitor has fulfilled the requirement.

      For example, to fulfill the Employee Health Verification Requirement, employees must have a health verification record in the Employee Health Verification table [sn_imt_monitoring_health_verification].

      Inputs

Label	Name	Type	Mandatory
Employee Health Verification	health_verification	Reference.Employee Health Verification [sn_imt_monitoring_health_verification]	Yes

   d. Add a **Script Step** to the Action Outline.

   e. In the **Required Runtime** field, select **Instance**.

   f. Create an input variable using the input that you created for the action as the value.

      This enables you to use the input for the action in a script.

      Input Variables

Name	Value
health_verification	**Employee Health Verification** input that you created in the Inputs section.

   g. In the **Script** field, add a script to define the conditions when an employee's or visitor's requirement status is `cleared` or `not_cleared`.

      For the Employee Health Verification Requirement, the requirement is `cleared` for an employee if their health verification response is `yes`, and `not_cleared` for any other response.

```
(function execute(inputs, outputs) {
 outputs.requirement_status =
 inputs.health_verification.response == 'yes'
     ? 'cleared'
```

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```
    : 'not_cleared';
})(inputs, outputs);
```

h. Create an output variable for the requirement status.

This defines the *requirement_status* variable that you used in the script.

Output Variables

Label	Name	Type	Mandatory	Choice (Advanced options)
requirement_status	requirement_status	Choice	Yes	Dropdown with --None--

i. In the Outputs section of the Action Outline, create an output for the requirement status.

Creating this output enables you to use the *requirement_status* output variable from the script as an output returned by the action.

Output Variables

Label	Name	Type	Mandatory	Choice (Advanced options)
Requirement status	requirement_status	Choice	No	Dropdown with --None--

j. Assign the *requirement_status* value to the output.

Output Variables

Label	Value
Requirement Status	*requirement_status* output variable from the script step.

The action returns the value of the *requirement_status* for the employee or visitor (`cleared` or `not_cleared`) as an output.

k. Click **Publish**.

2. Create a health and safety requirement.

a. Navigate to **Employee Health and Safety Status** > **Health and Safety Requirements**.

b. Click **New**.

c. On the form, fill in the fields.

The Include previous applicable records section defines a set of records that have already been created but should still trigger the requirement flow. Including previous records ensures that employees or visitors who complete the requirement before it is activated have their requirement status set to **Cleared**.

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Health and Safety Requirement form

Field	Description
Name	Unique name for the requirement. For example, `Employee Health Verification Requirement`.
Requirement for	Who the requirement applies to. The options are **Employee** and **Visitor**. A requirement must apply to either employees or visitors, not both. For example, the Employee Health Verification requirement only applies to employees.
Requirement flow	Leave this field empty. You will return to the requirement record and fill in this field after you create the flow.
Active	This field is read-only. Once you update all fields for the requirement, you can use the **Activate** button to activate the requirement.
Default status	The default status is assigned to health and safety users who don't have any activity towards completing the requirement. The options are **Cleared** and **Not Cleared**. For example, employees who don't have a health verification record are assigned a default status of **Not Cleared** for the Employee Health Verification Requirement.
Use duration	Option to set a time limit that the requirement status is valid for.
Valid for	Time limit that the requirement status is valid for. For example, the Employee Health Verification Requirement status is valid for seven days. Employees must resubmit their health verification weekly to continue fulfilling the requirement. This field appears only when the **Use duration** field is selected.
Actionable	Option to add a link for employees to complete the requirement on the Health and Safety Status page.
Action name	The name of the action for the employee to complete the requirement. For example, **Submit self-report**. This name is shown on the Health and Safety Status page.

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Field	Description
	This field appears only when the **Actionable** field is selected.
Action URL	The URL of the Service Catalog item that employees use to complete the requirement. For example, the Employee Health Verification Requirement is completed by submitting the Health Verification form, which has the URL ?`id=sc_cat_item&sys_id=9c578864ed111010fa9b` This field appears only when the **Actionable** field is selected.
Action visibility	Sets when the link to complete the requirement is displayed on the Health and Safety Status page. Select **Visible when false** to only show the link when the employee hasn't completed the requirement, or select **Always visible** to always show the link. This field appears only when the **Actionable** field is selected.
Exclude	When selected, excludes all users in the **Audience** field from the requirement.
Audience	Select the audience to refine the number of users the requirement applies to. For example, you might want to target all users in an audience that happens to be located in California or target an audience you created specifically for a location, regardless of whether they are users who are traveling, visiting, or working in the location. No audience is selected by default and the requirement applies to users based on the rest of the form. **Note:** If **Exclude** is checked, the requirement targets all users except those in the audience.
Include previous applicable records	
Table	Table to look for previously created records that will trigger the requirement flow. For example, the Employee Health Verification Requirement uses the Employee Health Verification table [sn_imt_monitoring_health_verification].

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Field	Description
Condition	Add conditions to filter the records from the table that will trigger the flow.

d. Click **Submit**.

3. In Workflow Studio, create a flow to update the requirement status for an employee or visitor.

a. Create a new flow.

b. Save the flow in the Employee Readiness Core application.

c. Add a trigger so that the flow runs whenever the type of record that you're using to check the requirement status is created or updated.

For example, for the Employee Health Verification Requirement, the flow runs whenever a health verification record is created or updated.

Trigger

Trigger	Table	Condition	Run Trigger
Created or Updated	Employee Health Verification [sn_imt_monitoring_health_verification]	None.	For each unique change

d. Add the action that you created to the flow.

e. Add the record from the trigger as the input.
For example, for the Employee Health Verification input, add the Employee Health Verification record that was created or updated in the trigger event.

f. Add the Update User Requirement action provided in Employee Readiness Core to the flow.

Update User Requirement inputs

User [User]	Health and safety requirement [Health and Safety Requirement]	Requirement status	Trigger datetime
Employee or **User** field from the trigger record. For example, the **Employee** field from the Employee Health Verification record.	Health and safety requirement you created.	`requirement_status` returned by the action that you created.	**Created** field from the trigger record. Only use this input if you set a value for the **Valid for** field on the requirement.

g. Click **Activate**.

4. Complete the health and safety requirement.

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a. Navigate to **Employee Health and Safety Status** > **Health and Safety Requirements**.

b. Click the requirement that you created earlier.

c. In the **Requirement flow** field, add the flow that you created to update the requirement status for employees or visitors.

d. Click **Update**.

What to do next

When you create the requirement, it's not active by default. You must activate the requirement before you can track whether employees or visitors have fulfilled the requirement. For instructions, see Activate a health and safety requirement.

Deactivate a health and safety requirement

If you no longer need employees to fulfill a requirement before returning to the workplace, deactivate the requirement.

Before you begin

Role required: sn_imt_core.admin

About this task

When you deactivate a requirement, all records for the requirement in the Employee Health and Safety Requirement table [sn_imt_core_employee_health_and_safety_requirement] are deleted. The requirement is no longer tracked for any employees.

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Health and Safety Requirements**.
2. Click the requirement that you want to deactivate.
3. Click **Deactivate**.

Included health and safety requirements

Employee Readiness Core provides pre-built requirements.

Requirements are not active by default. A requirement must be activated before you can track whether employees or visitors have fulfilled the requirement. Pre-built requirements provided by Employee Readiness Core are ready to activate without any modifications. However, you can choose to edit them to meet your company's needs.

Employee Health Verification Requirement

This requirement checks that employees have submitted their health verification. To fulfill the requirement, the health verification must have been submitted within the past seven days. Employees who don't have a record in the Employee Health Verification table [sn_imt_monitoring_health_verification] have a default requirement status of **Not Cleared**. This requirement uses data from the Employee Health Screening application. For more information, see Employee Health Screening.

Self Report Requirement

This requirement checks that employees have submitted a self report with a status of **Returning to work**. Employees who don't have a record in the Crisis Task table [sn_imt_quarantine_crisis_task] have a default requirement status of **Not Cleared**. This requirement uses data from the Emergency Self Report application. For more information, see Emergency Self Report.

Visitor Invitation Requirement

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This requirement checks that visitors have agreed to follow the company safety policies outlined in their invitation email. To fulfill the requirement, the agreement must have been submitted within the past two days. Visitors who don't have a record in the Health and Safety Visitor Invitation table [sn_imt_core_visitor_invitation] have a default requirement status of **Not Cleared**. This requirement uses data from the Employee Readiness Core application.

Exposed Contacts Requirement

This requirement checks the status of employees who have been added to the potentially exposed contacts list of a contact tracing case and sets their health and safety requirement status. Employees with the status of Cleared in the Exposed Contacts table [sn_imt_tracing_exposed_contact] have the requirement status of Cleared. Otherwise, their status is Not Cleared. This requirement uses data from the Contact Tracing application. For more information, see Contact Tracing.

Privacy Consent Requirement

This requirement checks that employees have responded to the privacy consent request. Employees who responded to the privacy consent as **I Agree** have the requirement status of Cleared. Otherwise, their status is Not Cleared. This requirement uses data from the Contact Tracing application. For more information, see Contact Tracing.

Testing Requirement Satisfied

This requirement checks the most recently submitted COVID-19 diagnostic test result for employees. Employees with a negative test result have a status of Cleared and employees with a positive test result have a status of Not Cleared. Employees without a test result or an inconclusive test result have a status of Cleared if they aren't a potentially exposed individual in a contact tracing case and Not Cleared if they are a potentially exposed individual. However, submitting an inconclusive test result will not change an employee's status if they have already submitted a positive or negative result. This requirement uses data from the Health and Safety Testing and Contact Tracing applications. For more information, see Health and Safety Testing.

COVID-19 Vaccine Requirement

This requirement checks that employees have received their COVID-19 vaccine. Employees who don't have a record in the Vaccine profile table [sn_imt_vaccine_vaccine_profile] have a default requirement status of **Not Cleared**. This requirement uses data from the Vaccination Status application. For more information, see Vaccination Status.

View your health and safety status

View your health and safety status page to check your progress on company requirements for returning to the workplace or visiting a site.

Before you begin

Role required: none

About this task

Your status page lists all the requirements that you must fulfill before you can return to the workplace or visit a site. If you've fulfilled any requirements that are valid for a limited amount of time, your status page shows the amount of time remaining until you must take action to complete the requirement again. If Workplace Core is installed, your status page also shows your upcoming workspace reservations.

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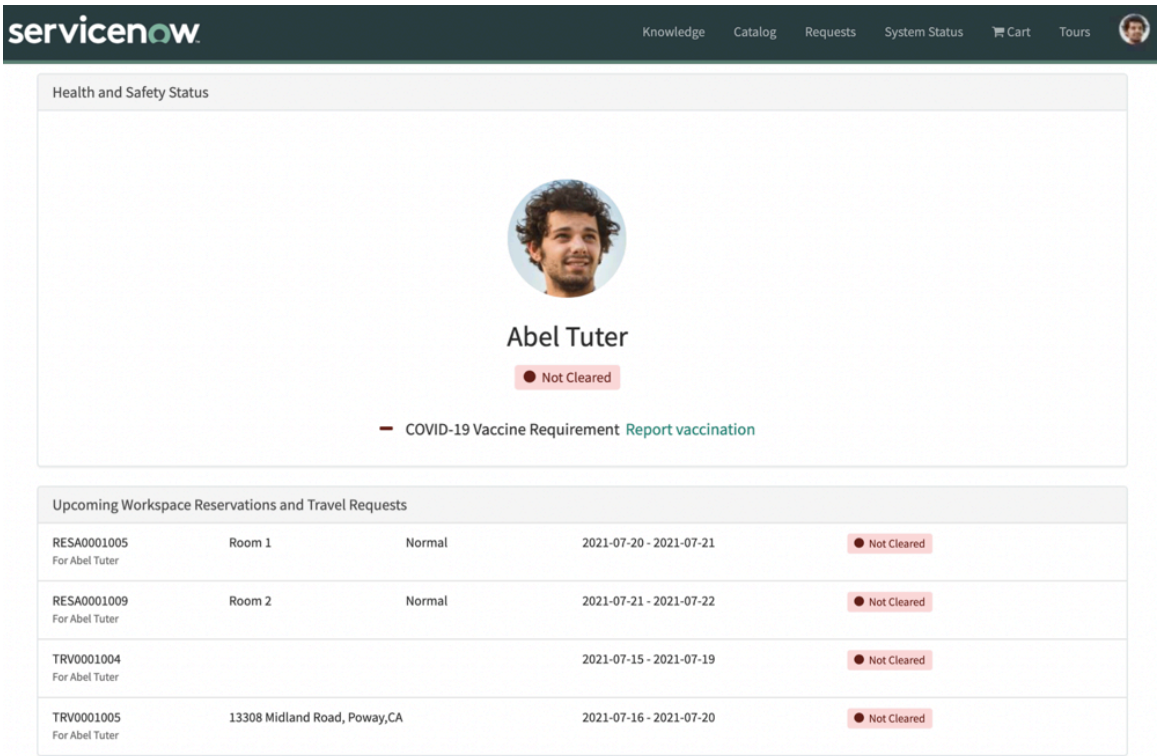
Note: Your status page shows your requirements and eligibility for your current location by default. If a requirement is not required, you cannot see the specific health and safety requirement on your Health and Safety Status page.

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **My Status**.

   Note: To view your status page on the Now Mobile app, navigate to **Health** > **Prepare for arrival** > **My readiness checklist**.



2. **Optional:** Select one of your upcoming reservations and travel requests to review your eligibility for a reservation or travel request.
3. Complete any unfulfilled requirements by clicking the link next to the requirement.

   Note: Some requirements might not have a link. If you need help completing the requirements, contact your organization.

View your users' health and safety status

View the health and safety status of your team to check their progress on company requirements for returning to the workplace.

Before you begin

Role required: sn_imt_monitoring.monitoring_user

All users can view the health and safety status of their direct reports. However, the sn_imt_monitoring.monitoring_user role is required to view details about team members who are not your direct reports.

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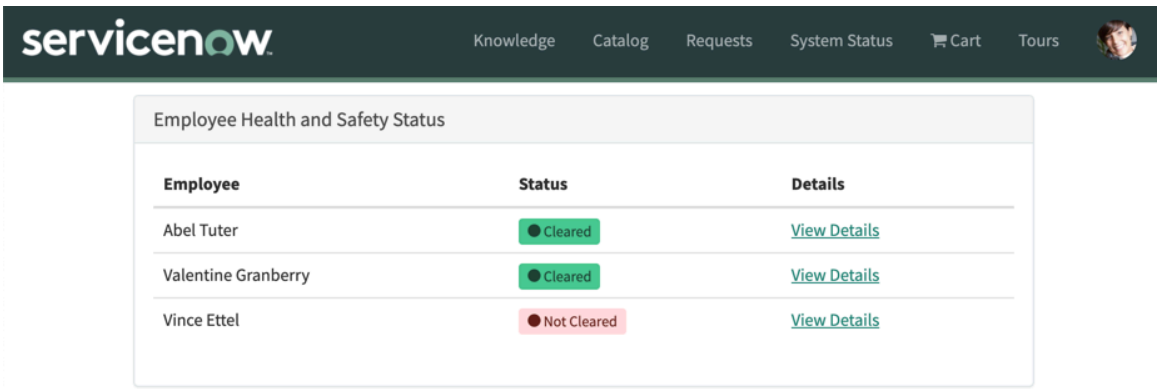
Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **View Team Status**.

   Note: To view the status page on the Now Mobile app, navigate to **Health** > **My Team** > **My Team's Safety Status**.

   The status page shows whether each user has completed all requirements for returning to the workplace.

   Note: A user is **Cleared** or **Not Cleared** based on the health and safety requirements of their current location.



2. **Optional:** View the specific list of requirements that a user has cleared or not cleared by clicking **View Details**.

Invite a visitor to the workplace

Submit a visitor invitation to send an email to your visitor with information about their upcoming visit. Before visitors can enter the workplace, they must respond to the email and agree to comply with the safety requirements and policies listed in the email.

Before you begin

Role required: None

Procedure

1. Open the visitor invitation form based on the type of device that you're using.

Option	Action
Smartphone or tablet	From the Now Mobile, tap **Health**, and under **Follow These Safety Practices**, tap **Set up a visit**.
Computer	Navigate to **Employee Health and Safety Status** > **Set up a visit**.

2. On the form, fill in the fields.

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Set up a visit to our company form

Field	Description
Host employee	The employee who is inviting the visitor.
Location of visit	Workplace location of the visit.
Date of visit	The date of the visit.
Visitor's first name	Visitor's first name.
Visitor's middle name	Visitor's middle name.
Visitor's last name	Visitor's last name.
Visitor's phone	Visitor's phone number.
Visitor's email	Visitor's email address.
Visitor's company	The company that the visitor works for.
Reason for visit	The reason for the visit.
Watch list	Everyone on the watch list receives an email notification when the visit is approved or canceled.

3. Click **Submit**.

Result
A visitor record is created in the Health and Safety Visitors table [sn_imt_core_visitor], or updated if a record for the visitor already exists. A record is also created in the Health and Safety Visitor Invitation table [sn_imt_core_visitor_invitation].

What to do next
To view all of your invited visitors, navigate to **Employee Health and Safety Status** > **My Visitors**.

Add a Safe Workplace audience

Add a collection of users for Emergency Outreach notifications. Target individual users or specific users based on criteria such as location, department, or group.

Before you begin
Role required: sn_imt_core.admin, sn_imt_checkin.checkin_admin, or admin

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Safe Workplace Audience** and click **New**.
2. In the **Name** field, enter a descriptive name for the audience.

   Example
   For example, `Building C Network Group` or `Facilities employees reporting to Bob`.
3. Indicate the users who should receive notifications.

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Method	Action
Add users manually	Select the users that you want to add to the audience in the **Users** field.
Upload a spreadsheet of users	Select the link to add a file in the **Upload file** field. The header of the first column of the spread sheet must be `user_name` if you upload a list of user IDs or `email` if you upload a list of email addresses. **Note:** If you have more than 500 en tries, split the spreadsheet into multiple files.
Use additional criteria based on common User [sys_user] table fields	**a.** Select values for the **Groups**, **Roles**, **Com panies**, **Locations**, or **Departments** fields. **b.** Select a value in the **Audience criteria** field. ▪ Include all of the users listed in the Users field and any additional users who fulfill at least one of the other criteria by select ing **Any of the criteria (OR)**. ▪ Include only users who fulfill all select ed criteria by selecting **All the criteria (AND)**. Any users listed in the **Users** field are included in the audience only if they also fulfill all the additional criteria.
Enter conditions in the condition builder	**a.** Either retain the default setting of the User [sys_user] table or select a different table and select a column in that table to view its fields. The condition builder lists fields based on your selection. Scroll to the bottom of the list and select **Show related fields** to view fields from related tables. The number of users that the audience will contain is shown below the **Audience crite ria** field. As you add criteria, check this num ber to ensure that users are added and fil tered as you intend.

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Method	Action
	b. Create the condition. For example, you could specify one floor of a particular building or users who report to a particular manager.

4. Select **Submit**.

Synchronize Employee Readiness Core visitors with Workplace Visitor Management

As an administrator, synchronize the visitor tables in the Employee Readiness Core and Workplace Visitor Management applications.

Before you begin

To successfully enable visitor synchronization between Employee Readiness Core and the Workplace Visitor Management application in Workplace Service Delivery, note the following requirements:

- The Workplace Visitor Management application must be installed. For more information, see Install Workplace Visitor Management.
- Ensure your organization has a data backup before running the `Sync Visitors` fix script. Otherwise, syncing is not reversible.

Role required: admin or sn_imt_core.admin

About this task

To maintain consistent data on visitors, organizations may synchronize data between the Employee Readiness Core sn_imt_core_visitor table and the sn_wsd_visitor_visitor table in Workplace Visitor Management.

An initial synchronization using the `Sync Visitors` fix script is required before updates are synced automatically. Newly added fields to either visitor table are ignored by the fix script while existing fields are left as-is. Administrators with the script_include_admin role may customize the `VisitorSyncing` and `WSDVisitorSyncing` script includes called by the fix script to meet their organization's needs, for example, to accommodate new fields added to the visitor tables. Administrators must run the fix script after performing any customizations to the script includes.

Any data conflicts are resolved by using the most recent changes to a table. After the tables are synchronized, updates to one table automatically are reflected on the other.

Important: Do not delete visitors from the Employee Readiness Core sn_imt_core_visitor table because they do not sync back to Workplace Visitor Management. Deletions from the sn_wsd_visitor_visitor table are performed when you anonymize a visitor. Anonymized data does sync to the sn_imt_core_visitor table. For more information on anonymizing visitors or deleting visitor data in Workplace Visitor Management, see Anonymize a visitor.

Synchronization can be disabled; however, the initial sync is irreversible without a backup.

Procedure

1. Unless the *`sn_imt_core.visitor_syncing`* property is already enabled and the initial fix script run was completed, enable this property.
   This property controls visitor syncing between visitors in Employee Readiness Core and Workplace Visitor Management. It is disabled by default.

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a. Navigate to **Employee Health and Safety Status** > **Properties**.

b. Set the *sn_imt_core.visitor_syncing* property to **Yes**.

c. Click **Save**.

2. Navigate to **System Definition** > **Fix Scripts**.
3. Open the `Sync Visitors` fix script from the list.
4. If the **Active** check box for **Sync Visitors** is not selected, select it and click **Update**.
5. Click **Run Fix Script**.

Result

Visitor records synchronize between the Employee Readiness Core visitor table and the sn_wsd_visitor_visitor table in Workplace Visitor Management.

Trouble?

If your organization wants to disable synchronization, navigate to **Employee Health and Safety Status** > **Properties**, clear the *sn_imt_core.visitor_syncing* check box, and click **Save**.

My Safe Workplace

Use the ServiceNow® My Safe Workplace page to view all of your information and resources for returning to the workplace. Manage your requirement status for workplace entry, update your health status, track workspace reservations, and create requests for PPE or testing.

To view My Safe Workplace, navigate to **Employee Health and Safety Status** > **My Safe Workplace**.

My Safe Workplace page

Widget	Description
Manage your overall status	View whether you're cleared to enter the workplace based on your completion of entry requirements for your current location.
Submit an update about your health status	View and update your current health status. Managers can also view and update the health status for their direct reports. For managers, this widget is called **Submit an update about a person's health status**.
Track your reservations	The **Upcoming reservation** tab shows your next workspace reservation. The **All reservations** tab shows your next five reservations. Click **Reserve a space** to create a new reservation to reserve a space for a day.
Things you can request	You can take the following actions. • Submit a list of daily contacts for contact tracing • Submit a user privacy consent form for contact tracing • Submit a health verification about your health status and compliance with safety policies • Screen a visitor for entry • Invite a visitor • Request permission to travel • Request a COVID-19 diagnostic test or report your test results

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Widget	Description
	• Request personal protective equipment (PPE) such as masks, gloves, or goggles • Reserve shifts and workspaces • Schedule your arrival time at a workplace If some ServiceNow® Safe Workplace suite applications are not installed, some requests may not be available.
Tasks	Track the status of your travel, health testing, workspace reservation, and PPE requests.
View your team's status	View whether your direct reports are cleared to enter the workplace. This widget is only displayed for managers and reflects a user's status for their current location.
Key resources	View featured knowledge articles.

Set up My Safe Workplace

Add or remove widgets that employees can view on My Safe Workplace.

Before you begin

Role required: admin

About this task

My Safe Workplace uses widgets from ServiceNow® Safe Workplace suite applications.

- The **Submit an update about your health status** widget requires the ServiceNow® Emergency Self Report application.
- The **Track your reservations** widget requires the ServiceNow® Workplace Core application.

If these applications are not installed, by default there are blank spaces in My Safe Workplace where the corresponding widgets would be displayed. Complete the setup steps to remove any blank spaces.

My Safe Workplace also has widgets for employees to create and track requests. The requests use features from the following Safe Workplace suite applications.

- ServiceNow® Contact Tracing
- ServiceNow® Employee Health Screening
- ServiceNow® Employee Readiness Core
- ServiceNow® Employee Travel Safety
- ServiceNow® Health and Safety Testing
- ServiceNow® Workplace PPE Inventory Management
- ServiceNow® Workplace Core

If some of these applications are not installed, employees can still use the widgets to create and view requests based on the applications that are installed. Install the remaining applications to give employees access to all request types.

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Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Click **Designer**.
3. Search for **Safe Workplace Today**.
4. Adjust the page layout to remove any blank spaces.
   You can also remove any widgets that you don't want to use, or add new widgets. For detailed instructions, see Create and edit a page using the Service Portal Designer.

What to do next

To complete the setup, make sure that employees have the required roles to view the widgets.

- The **Submit an update about your health status** widget requires the sn_imt_quarantine.crisis_task_user role.
- The **Track your reservations** widget requires the sn_wsd_core.workplace_user role.
- The **View your team's status** widget is only displayed for managers. The sn_imt_monitoring.monitoring_user role is required for managers to view details about their direct reports.
- There are no required roles for all other My Safe Workplace widgets.

Maintaining privacy consent in Employee Readiness Core

The Employee Readiness Core application enables your organization to maintain the data privacy of all employees and obtain consent to various privacy policies in Safe Workplace suite applications.

Manage your organization's privacy policies with Employee Readiness Core:

- Create and manage privacy consent templates for your various privacy policies.
- Manage location-based privacy configurations and assign templates to various regions.
- Review the consent status to see whether an employee has agreed, disagreed, withdrawn consent, or not responded.
- Use Emergency Outreach to send email and mobile push notifications for employees to consent to privacy policies.
- Enable users to consent to privacy policies when reporting diagnostic test results with Health and Safety Testing.

Employers remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Employers' specific requirements.

Setting up privacy consent settings

As an administrator, you can configure privacy consent templates, location-based privacy configurations, and notifications used to send privacy consent alerts for Safe Workplace suite applications.

With Employee Readiness Core, you can configure various privacy policies such as those governing the use of data or test results, or to track health status, and send notifications to employees seeking consent to the use of their data.

User privacy regulations vary from country to country. For some countries, consent by employees to use their data is not required but for others it is a must. You can set different privacy policies for different locations and organization setups. Some organizations maintain a separate privacy policy for each location while others maintain a single privacy policy for all locations.

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As an administrator, you must configure the following settings to use privacy consents with Employee Readiness Core:

1. Modify or create a privacy consent template.
2. Generate or locate privacy-based configurations.
3. Assign the sn_imt_core.privacy_consent_user role to all users who must respond to a privacy policy.
4. Add all users who must respond to a privacy policy to a Safe Workplace audience.

Note: For more information, see Add a Safe Workplace audience.

Modify or add a privacy consent template

Modify or add a privacy consent template to be used in the location privacy configuration for Safe Workplace suite applications.

Before you begin
Role required: sn_imt_core.admin

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Privacy** > **Privacy Consent Templates**.
2. Open a template record to modify it or click **New** to create one.
3. Enter a unique name of the template in the **Name** field.
4. Enter the privacy policy statement in the **Privacy statement** field.
   If the privacy policy is different for different locations, create one template for each location and specify the policy statement for that location.

   If your organization has a single policy for all locations across the globe, update the default template.
5. Click **Submit**.

Generate location-based privacy configurations

As an administrator, generate the privacy configuration for locations set up in your instance to use with Safe Workplace suite applications.

Before you begin
Role required: sn_imt_core.admin

About this task
You can generate a location-based, default privacy configuration for each country available in the Locations [cmn_location] table. For each location, you can specify whether the privacy consent is required and update the privacy policy statement.

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Privacy** > **Location Privacy Configuration**.
2. Click **Generate Location Configurations**.
   The default configuration is created for each country and appears in the Location Privacy Configurations list.
3. Open a location to review its configuration and modify it if necessary.
4. Configure the privacy consent text if necessary.

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Privacy consent status	Action
Consent is not required for the location	Clear the **Needs privacy consent** check box.
Consent is required for the location	Determine the privacy consent text. ○ If you have defined a specific privacy con sent template to assign to this location, se lect it from the **Privacy consent template**. The privacy statement content from the up dated template is copied into the **Privacy statement** field. ○ Retain the default privacy statement text and make any modifications.

5. Click **Update**.

Send an Emergency Outreach notification for employee privacy consents

Send an Emergency Outreach notification, on demand, to employees to provide a privacy policy and seek consent to use of their data in accordance with the privacy policy.

Before you begin

Ensure that you have the Emergency Outreach application installed. For details, see Install Emergency Outreach.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin

About this task

Important: The privacy consent notification is sent to a user only once even if the user is in the target audience of multiple privacy consent notifications.

Procedure

1. Navigate to **All** > **Emergency Outreach** > **View Outreaches**.
2. Review and edit an existing outreach record or click **New** to create one.
3. On the **Safe Workplace Audience** tab, select the audience from the list and click **Save**.
   If you don't have an audience defined, click **New** and define an audience from user lists, groups, departments, locations, and so on. After you save the Safe Workplace audience, you can use it to send any outreach message. For more information, see Add a Safe Workplace audience.
4. On the **Content configuration** tab, select **Privacy Consent (common)** in the **Response mode** field.
5. On the **Content configuration** tab, select a **Privacy consent template**.
6. **Optional:** Enable the outreach to provide location-specific privacy consents by selecting the **Use Country** option on the **Content configuration** tab.

   (Optional) When enabled, the privacy statement text in Location Privacy Configuration takes precedence over text in the privacy consent templates. This text is used for the outreach,

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system notification email, and push notification. If you need to update the text that users receive, you must change the location's privacy statement.

For more information on updating a location's privacy statement, see Generate location-based privacy configurations.

7. Select a notification in the **Notification** field and choose how to send the notification.

   Note: The default **Notification** is the **User Privacy Consent (Core)** that references the [sn_imt_core_user_privacy_notice_and_consent] table.

   - To send the notification by email, select the **Email notification** check box.
   - To send a mobile push notification, select the **Now Mobile Push notification** check box.

     This option is available only if the ServiceNow NowMobile App Screens and Applet Launcher (com.glide.mobile-employee) plugin is activated.

     Push notifications use the ServiceNow Request Application notification device. When a user registers their mobile application to an instance, this notification device is automatically created in their notification preferences. Ensure that this device is active for the users that you want to receive the push notification.

8. Review the message content.
   - For email notifications, review the email subject and email body and modify it if necessary.
   - For push messages, review the **Push message** and **Detailed Push message** fields.
9. Click **Update**.
   The target audience and content configuration changes are saved.
10. To send the notification, click **Send Notification**.

Result

The notification is sent to the target audience.

Note: The outreach notification is not sent to any users in the selected audience who do not have a location set in their user profile or whose privacy consent is disabled in the location privacy configuration.

If you need to resend the notification, navigate to **Emergency Outreach** > **View Outreaches**, select the outreach, and click **Resend Notification**.

Submitting privacy consents

When you receive an email or mobile notification for a privacy consent, read the privacy policy statement and submit a response indicating whether you agree to the use of your data.

Respond to an email notification request for privacy consent

When you receive an email notification for privacy consent, read the privacy policy statement and submit a response indicating whether you agree to the use of your data.

Before you begin

Role required: sn_imt_core.privacy_consent_user

Procedure

1. Open the link contained in the notification for privacy consent.
2. Read the privacy policy statement in the **Privacy Notice** field.
3. Select your response and click **Submit**.

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- If you agree to the privacy policy and use of your data, select **I Agree**.
- If you do not want the organization to use your data, select **I Disagree**.

Note: If you previously agreed to the privacy consent, a **Withdraw Consent** option is available. You can change your response to withdraw your consent by selecting **Withdraw Consent** and clicking **Submit**.

Result

Your current privacy consent decision is updated.
The status of the notification updates to **Acknowledged**.

If you have a health and safety requirement for the privacy consent activated, a record is created with the requirement status.

- If you agreed to the privacy policy and use of your data, the requirement status updates to **Cleared**.
- If you disagreed or withdrew your consent, the requirement status updates to **Not Cleared**.

Submit a privacy consent from a mobile phone

If you receive a mobile push notification request for a data privacy consent, read the privacy policy statement and indicate whether you agree to the use of your data in accordance with the policy.

Before you begin

To receive mobile push notifications, you must have the Now® Mobile app.

Role required: sn_imt_core.privacy_consent_user

Procedure

1. Tap the notification to open the message.
2. In the message, tap **View privacy consent**.
3. Read the privacy policy statement in the **Privacy Notice** field.
4. Select your response and click **Submit**.
   - If you agree to privacy policy and use of your data, select **I Agree**.
   - If you do not want the organization to use your data, select **I Disagree**.

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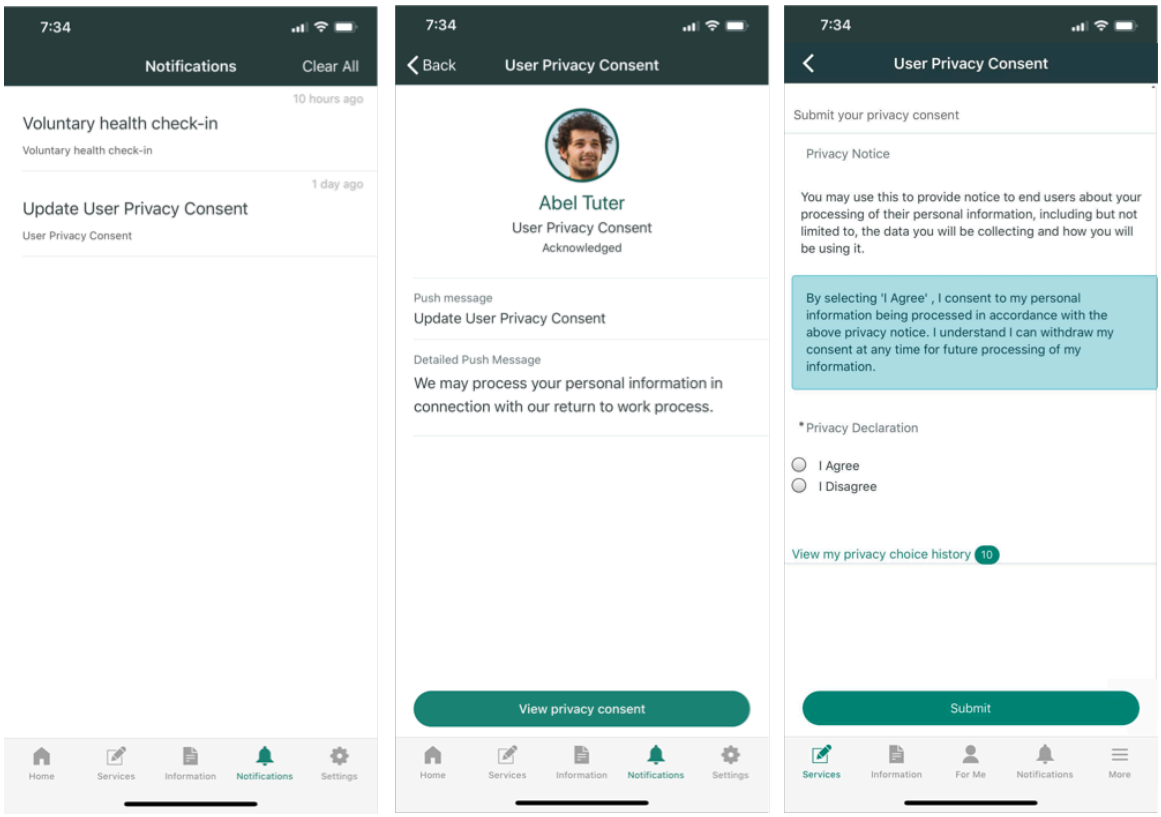
Note: If you previously agreed to the privacy consent, the **Withdraw Consent** option is available. You can change your response to withdraw your consent by selecting **Withdraw Consent** and clicking **Submit**.



Result

Your current privacy consent decision is updated.
The status of the notification updates to **Acknowledged**.

If you have a health and safety requirement for the privacy consent activated, a record is created with the requirement status.

- If you agreed to the privacy policy and use of your data, the requirement status updates to **Cleared**.
- If you disagreed or withdrew your consent, the requirement status updates to **Not Cleared**.

Review user privacy consents

Review user privacy consent responses submitted by employees indicating their response to requests for consent to use their data in accordance with a privacy policy.

Before you begin

Role required: sn_imt_core.admin

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Privacy** > **User Privacy Consents**.
2. Click the status in the **Consent status** column to open the employee's consent record.
3. Review the employee's responses in the Consent History related list.
   - **I Agree**: Employees have responded and agreed to have their data used.
   - **I Disagree**: Employees have responded and have not agreed to have their data used.

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- **Withdraw Consent**: Employees previously agreed to have their data used but later withdrew the consent.
- **Awaiting Response**: Employees have not responded yet.

Note: The consent history record with the latest preference submitted date is the last response from the employee.

You can send the notification again to employees who have not yet responded.

Employee Readiness Core Approval Portal

The Employee Readiness Core Approval Portal enables you to approve or deny submitted COVID-19 vaccine doses, vaccine exemptions, and health tests.

Installation and setup requirements

The Approval Portal is included with Employee Readiness Core. To use the Approval Portal, your organization must install Health and Safety Testing and Vaccination Status.

Note: Both applications must be installed, but your organization does not have to use both applications.

- For more information on installing Health and Safety Testing, see Install Health and Safety Testing.
- For more information on installing Vaccination Status, see Install Vaccination Status.

Using the Approval Portal

To use the Approval Portal, you must have either the Vaccination Status admin [sn_imt_vaccine.admin], Health and safety approver [sn_imt_core.health_and_safety_approver], or Approval Portal manager [sn_imt_core.approval_portal_manager] roles.

Managers with the Approval Portal manager role can see only approvals for their direct reports. This role is automatically assigned to all managers as long as one of the following properties is enabled:

- Allow managers the ability to update health test results [sn_imt_health_test.allow_managers_ability_to_update_test_result_records]
- Allow managers the ability to update vaccine response records [sn_imt_vaccine.allow_managers_ability_to_update_vaccine_response_records]
- Allow managers the ability to update vaccine exemption requests [sn_imt_vaccine.allow_managers_ability_to_update_vaccine_exemption_records]

Each property provides managers access to the Approval Portal, however, managers are able to see and interact with only records associated with the activated property. Activating multiple properties grants additional capabilities to the reviewing managers.

You can perform the following tasks on the Approval Portal:

- View and approve or deny COVID-19 health test results. For more information, see Confirm COVID-19 test results for a user.
- View and approve or deny an employee's vaccination status and dose details. For more information, see Confirm the reported vaccination status for a user.
- View and approve or deny employee vaccination exemption requests. For more information, see Confirm a vaccine exemption request for a user.

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- Review attachments and documentation submitted with the user's responses and requests. Supported documents open in the document viewer. For more information on supported formats, see Document Viewer.
- Review and add work notes to the records.

The Employee readiness approvals page provides employee vaccine and health records in the tabs listed in the following table. You can filter the records that are displayed by selecting a record type from the **Record type** field list, using the search bar, or changing the **Sort** field list.

Note: The search behavior for the Approval Portal is a *starts with* search.

Employee readiness approvals page tabs

Tab	Description
Approvals to review	Lists records that have not been approved or denied.
Approved	Lists all approved vaccine responses, exemption requests, and health tests.
Denied	Lists all denied vaccine responses, exemption requests, and health tests.

Employee Travel Safety

Use the ServiceNow® Employee Travel Safety application to help support safe travel for employees by verifying the site safety and policy compliance of destinations, monitoring employee health status, and keeping a contact log during travel.

Before booking travel in a travel management system, employees request permission for their trips. The employee's manager or a designated travel approver can approve or reject the travel request based on COVID-19 case data and a site safety evaluation for the destination.

When an employee's travel request is approved, monitor their health status using a daily health verification that the employee submits before and during the trip. Employees can also keep a daily contact log for the duration of the trip to track potential exposure.

Use with other Safe Workplace suite applications

Employee Travel Safety is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.

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- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.
- With the Contact Tracing application, evaluate the readiness of your users to return to the workplace by using data such as badge scans, Wi-Fi access logs, and daily contact logs to help identify potential user interactions.

All Safe Workplace suite applications are available in the ServiceNow Store.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

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Install Employee Travel Safety

You can install Employee Travel Safety if you have the admin role.

Before you begin

Employee Travel Safety requires the following applications.

- ServiceNow® Employee Readiness Core
- ServiceNow® COVID-19 Global Health Data Set

The ServiceNow® Employee Health Screening and ServiceNow® Emergency Outreach applications can optionally be installed to have employees complete a daily health verification before and during travel.

The ServiceNow® Contact Tracing and Emergency Outreach applications can optionally be installed to have employees complete a daily contact log during travel.

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)

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- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Employee Travel Safety`.
3. Click **Install**.

   The Application installation dialog box opens.
4. Click **Activate**.

Components installed with Employee Travel Safety

Several types of components are installed with Employee Travel Safety, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Employee Travel Safety admin [sn_imt_travel.admin]	Role required to set up Employee Travel Safety properties.	sn_imt_travel.approver
Travel approver [sn_imt_travel.approver]	Role required to view and approve travel requests for all employees. This role is assigned to the Travel Approvers group.	approver_user

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Role title [name]	Description	Contains roles
	Note: Managers must be assigned the approver_user role to approve travel for the employees that they supervise. Don't assign managers the sn_imt_travel.approver role unless it's acceptable for them to view and approve travel requests for all employees.	

Tables installed

Table	Description
Employee Travel Safety Request [sn_imt_travel_request]	List of all employee travel requests.

Configure Employee Travel Safety

Complete all configuration tasks to ensure that travel notifications and approvals are set up correctly for your company.

Set up travel approvers

Set up user groups and roles so that employee travel can be approved by managers or by designated travel approvers.

Setting up manager approval or designated approvers is a required configuration step for the Employee Travel Safety application.

Manager approval

To set up travel approval by managers, assign the approver_user role to all managers. With this role, managers can only view and approve travel requests for the employees they directly supervise.

Designated approvers

To set up designated travel approvers, add users to the Travel Approvers group. Members of this group can view and approve travel requests for all employees. Don't add managers to the Travel Approvers group unless it's acceptable for them to view and approve travel requests for all employees.

By default, a travel request must be approved by both the employee's manager and a member of the Travel Approvers group. If the employee doesn't have a manager listed in your ServiceNow instance or there are no users in the Travel Approvers group, one approval is enough to approve the travel request. An employee's travel request is automatically rejected if the employee doesn't have a manager listed in your ServiceNow instance and there are no users in the Travel Approvers group. For information about changing the default approval settings, see Modify the travel approval flow.

Set up Employee Travel Safety properties

Set up Employee Travel Safety properties to ensure that site safety verification emails, employee contact logs, and employee health verifications are managed according to your company's requirements.

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Before you begin
Role required: sn_imt_travel.admin

About this task
Setting up the Employee Travel Safety properties is a required configuration step for the Employee Travel Safety application.

Procedure
1. Navigate to **All** > **Employee Travel Safety** > **Properties**.
2. Set the following property values.

Employee Travel Safety properties

Property	Description
Name of the company's travel management system. [sn_imt_travel.travel.management.system.name]	Name of your company's travel management system. Thi to provide employees who are approved for travel with a management system.
URL of the company's travel management system. [sn_imt_travel.travel.management.system.url]	URL of your company's travel management system. This to provide employees who are approved for travel with a management system.
Email travel contacts to ask them to verify site safety and policy compliance. [sn_imt_travel.email_site_verification]	When enabled, an email is sent to the primary contact th provides on their travel request to verify site safety and p The contact must respond to the email before the travel approved by a manager or travel approver.
Comma-separated list of affirmative responses. [sn_imt_travel.affirmative_email_responses]	Defines the responses that are accepted as `Yes` respon verification emails.
Enables sending email reminders to travel request approvers for requests pending approval. [sn_imt_travel.enable_approval_email_reminders]	When enabled, email reminders are sent to travel approv for travel requests that haven't been approved or rejecte
Length of time (in hours) to wait before sending travel request approvers a reminder. Default is 48. [sn_imt_travel.approval_email_reminder_period]	Sets the frequency of email reminders that are sent to tra managers. For example, when this property is set to 48, and managers will receive a reminder every 48 hours aft is submitted until it is approved or rejected. This property *`sn_imt_travel.enable_approval_email_re`* enabled.
Enables outreach to relevant employees about travel-related health verifications. [sn_imt_travel.daily.health.verification.outreach.flag]	When enabled, employees who are approved for travel receive notifications to complete a health verification. To set the frequency of the notifications, select a value for t *`sn_imt_travel.health.verification.run.`* more information about employee health verification, see Screening.
Choose whether Health Verifications will be sent to requester only once or daily. [sn_imt_travel.health.verification.run.type]	Sets the frequency of the health verification notifications employees who are approved for travel. To send daily no during travel, select **Send Daily**. To send a notification on request is approved, select **Send Once**.

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Property	Description
	Health verification notifications are only sent if the *sn_imt_travel.daily.health.verificatio* property is enabled. **Note:** Employees who are already enrolled in daily before their travel request is approved will see no ch receive additional notifications and they will still be e trip is complete.
Cancels a travel request if a health verification is not completed after a number of hours. [sn_imt_travel.allow.cancellation]	When enabled, travel requests are canceled if employee a health verification by the deadline. Enabling this prope *sn_imt_travel.daily.health.verificatio* property is also enabled.
For automatic request cancellation, enter the number of hours. [sn_imt_travel.cancellation_duration]	Sets the deadline for employees to complete a health ve property requires that the *sn_imt_travel.allow.* property is enabled.
Enables outreach to traveling employees about their daily travel contacts. [sn_imt_travel.daily.contact.log.outreach.flag]	When enabled, employees receive notifications to comp log during internal travel. Contact log notifications are no travel. Employees must be assigned the sn_imt_tracing.c receive contact log notifications. This property requires t and Emergency Outreach applications. For more informa logs, see Contact Tracing. **Note:** Employees who are already enrolled in daily their trip will see no change. They will not receive ad and they will still be enrolled after their trip is comple

3. Click **Save**.

Modify the travel approval flow

Modify the travel approval flow to change the default travel approval settings.

Before you begin
Role required: flow_designer

About this task
Modifying the travel approval flow is an optional configuration step for the Employee Travel Safety application. The travel approval flow is ready to use but can be modified to meet your company's requirements.

If you decide to modify the flow, deactivate the original flow and make a copy. Make any desired changes to the new flow, and then activate it. Modifying the copy makes it easier when you need to upgrade your ServiceNow instance.

Procedure

1. Navigate to **All** > **Flow Designer** > **Designer**.
2. In the Flows section, click **Travel Approval Flow**.
3. Click **Deactivate**, then click **OK** to confirm.

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4. In the upper-right corner, click the More actions icon (⋯), then click **Copy flow**.
5. Enter a name for the new flow.
6. In the **Application** field, select **Employee Travel Safety**.
7. Click **Copy**.
8. Make any desired changes to the new flow.
   For example, in cases where an employee has a manager listed in your ServiceNow instance and there are also users in the Travel Approvers group, by default, both the manager and a travel approver must approve the request. This setting is defined in action 8.1 of the flow. You can modify this action so that approval is only required from either a manager or a travel approver, not both. To make this change, the AND condition to approve must be replaced with an OR condition.
9. When you're done modifying the flow, click **Activate**, then click **OK** to confirm.

Customize notification emails

Modify the notification emails that are sent to employees, managers and travel approvers, and employee travel contacts to customize the notifications for your company.

Before you begin

Role required: admin

About this task

Modifying the notification emails is a required configuration step for the Employee Travel Safety application. By default, the notifications use a ServiceNow® banner and the placeholder signature Workplace, Co. Update the notifications to use your company name and logo.

The Employee Travel Safety application uses the following notifications.

Notification	Description
Site Verification Request	This email is sent to the primary contact that an employee provides on their travel request to verify site safety and policy compliance. By default, the email asks the contact to confirm the following policies. • The site screens all employees and visitors for symptoms. • All employees and visitors are required to wear personal protective equipment, such as masks. • All employees and visitors are required to follow social distancing rules. This email is only sent if the *sn_imt_travel.email_site_verification* property is enabled.
Employee Travel Safety Approver Request	This email is sent to an employee's manager and all members of the Travel Approvers group asking them to approve or reject the travel request.
Employee Travel Safety Request Reminder	This email is sent to managers and travel approvers as a reminder to approve or reject pending travel requests. This email is only sent if the *sn_imt_travel.enable_approval_email_reminders* property is enabled.

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Notification	Description
Travel Request Approval	This email is sent to an employee if their travel request is approved. The email has a link to your company's travel management system.
Travel Request Rejection	This email is sent to an employee if their travel request is rejected.
Travel-related contacts	This email asks an employee to complete a daily contact log. The email is sent to an employee daily for the duration of their trip. This email is only sent if the *sn_imt_travel.daily.contact.log.outreach.flag* property is enabled.
Travel-related health verification	This email asks an employee to complete a daily health verification. The email is sent to an employee daily once their travel request is approved though the duration of their trip. This email is only sent if the *sn_imt_travel.daily.health.verification.outreach.flag* property is enabled.
Travel request rescinded	This email is sent to an employee if they don't complete a health verification by the deadline. This email is only sent if the *sn_imt_travel.allow.cancellation* property is enabled.

Note: All notifications except the Employee Travel Safety Approver Request are translated to the language selected on the employee's user profile. The Employee Travel Safety Approver Request is translated to the language selected on the manager's or travel approver's user profile. If no language is selected for a user, notifications are translated to the default language for the instance.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Click the notification that you want to update.
3. To view the default notification, click **Preview Notification**.
4. Navigate to the **What it will contain** form section.
5. In the **Message HTML** field, click **Insert/edit image** and select your banner image.

   Tip: The image must be added before the mail script so that it appears at the top of the email.

   If you don't already have an email banner image in your ServiceNow instance, you can upload an image to use. For instructions, see Upload one or more images.
6. Click the **Show Notification Scripts** related link.
7. In the **Script** field, the code `template.print(util.getEmailCompanyLogo());` adds the default ServiceNow® banner to the email.
   Comment out or delete this line of code to remove the ServiceNow® banner.
8. In the **Script** field, replace all references to `Workplace, Co.` with your company name.

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9. **Optional:** If you would like to make any other changes to the email notification, update the **Script** field as needed.
   If you change any text used in calls to `gs.getMessage` or `gs.getMessageLang`, you must provide translations for your custom text in the Message table [sys_ui_message]. For more information, see Message table.
10. Click **Update**.
11. Return to the notification record and click **Preview Notification** to confirm your changes.

Request permission to travel

Before booking travel in a travel management system, request permission for your trip. Your manager or a travel approver can approve or reject your request based on infectious diseases, such as COVID-19 case data and a site safety evaluation for your destination.

Travel request

Use the following process when requesting permission to travel:

1. From your service portal or Employee Service Center (ESC), request permission to travel.
2. An email is sent to your manager to approve or reject the request. The email has a link to the travel request.
3. After approval, the **Additional comments** field on the Employee Travel Safety Request form is updated with the travel destination and details on the number of COVID-19 cases for the past 14 days for the location.
4. Travel requesters can request travel on the **Catalog** or **Request Something** tabs in the service portal.
5. Travel requesters can request travel on the **Catalog** tab in the ESC.
6. Travel requesters can check the status of their requests on the **Requests** tab in the service portal or the ESC.
7. Managers or approval team members can view employee travel requests from the **Employee Travel Safety** form.

Create a request to travel

Before booking travel in a travel management system, follow these steps to request permission for your trip.

Before you begin

Role required: none

Procedure

1. Navigate to **All** > **Employee Travel Safety** > **Request Travel**.

   Note: To create a travel request in the Now Mobile app, navigate to **Health** > **Follow These Safety Practices** > **Request Travel Permission**.

2. On the form, fill in the fields.

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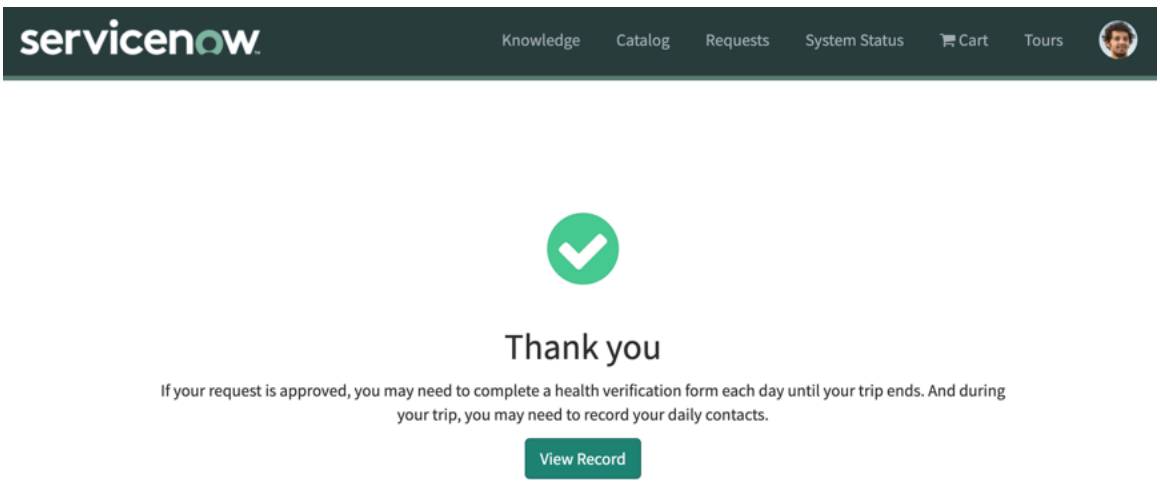
Request permission to travel

Field	Description
Travel type	The travel type. Select **Internal** if you're traveling to a location within your company. Otherwise, select **External**.
Location	The company location that you're traveling to. This field appears only when **Internal** is selected from the **Travel type** field.
Area of travel	Country, state, or county that you're traveling to. This field is used to provide managers and travel approvers with infectious diseases, such as COVID-19 case data for your destination.
Primary contact name	Name of your host or other contact at your destination. This field appears only when **External** is selected from the **Travel type** field.
Primary contact email	Email address of your host or other contact at your destination. This field appears only when **External** is selected from the **Travel type** field.
Primary contact company	Company of your host or other contact at your destination. This field appears only when **External** is selected from the **Travel type** field.
Travel start date	Start date of your trip.
Travel end date	End date of your trip.
Reason for visit	Reason for your visit.
Notes	Any additional comments you would like to provide for your manager or the travel approvers.

3. Click **Submit**.
   When you submit the travel request, an email may be sent to your primary contact for the visit if your company has enabled this feature. The email notifies your contact about your intent to travel and asks them to verify the site safety and policy compliance.



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What to do next

You will receive an email notification when your travel request is accepted or rejected.

Depending on your organization's policies, you may need to complete daily health verifications before and during travel. You may also have to complete a daily contact log during travel. If you're required to complete these tasks, you will receive emails with instructions. If you receive the daily health verification email, make sure to submit the health verification every day if you're not symptomatic. Your trip may be canceled if you don't submit the health verification.

To view all your travel requests, navigate to **Employee Travel Safety** > **My Requests**.

Manage a travel request

As a manager or travel approver, you can approve or reject travel requests.

Before travel requests can be approved, user groups and roles must be set up for managers or travel approvers. For more information, see Set up travel approvers.

There are multiple ways to view requests for travel:

- An email detailing a request for travel sent to the requester's manager and the group assigned.
- On the tabs in the Employee Service Center (ESC).
- On the **My Approvals** or **Requests** tabs in the service portal.
- From the View Travel Requests list.

Approve or reject travel requests

Managers or designated travel approvers are responsible for approving employee travel requests.

When an employee submits a travel request, an email is sent to the employee's manager and all members of the Travel Approvers group asking them to approve or reject the travel request. The email includes infectious diseases, such as COVID-19 case data for the travel destination. If the *sn_imt_travel.email_site_verification* property is enabled, the email also includes the results from the site safety verification. The email provides a link to the travel request, as well as direct links to approve or reject the request.

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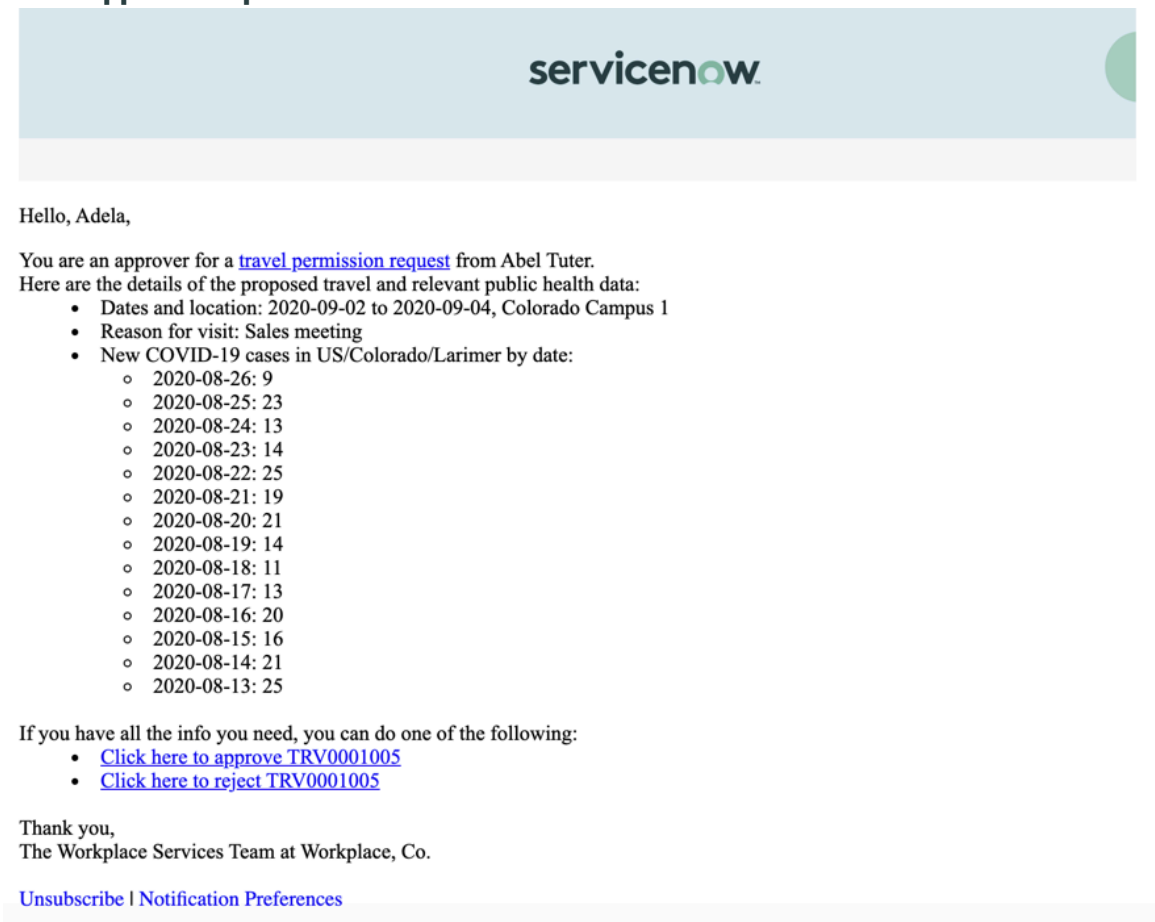
Travel approval request email



servicenow

Hello, Adela,

You are an approver for a travel permission request from Abel Tuter.
Here are the details of the proposed travel and relevant public health data:

- Dates and location: 2020-09-02 to 2020-09-04, Colorado Campus 1
- Reason for visit: Sales meeting
- New COVID-19 cases in US/Colorado/Larimer by date:
  - 2020-08-26: 9
  - 2020-08-25: 23
  - 2020-08-24: 13
  - 2020-08-23: 14
  - 2020-08-22: 25
  - 2020-08-21: 19
  - 2020-08-20: 21
  - 2020-08-19: 14
  - 2020-08-18: 11
  - 2020-08-17: 13
  - 2020-08-16: 20
  - 2020-08-15: 16
  - 2020-08-14: 21
  - 2020-08-13: 25

If you have all the info you need, you can do one of the following:

- Click here to approve TRV0001005
- Click here to reject TRV0001005

Thank you,
The Workplace Services Team at Workplace, Co.

Unsubscribe | Notification Preferences

Managers can also view travel requests for their employees by navigating to **Employee Travel Safety** > **My Employee's Requests**.

Users in the Travel Approvers group can view travel requests for all employees by navigating to **Employee Travel Safety** > **View Travel Requests**.

Employees receive an email notification when their travel request is approved or rejected.

Cancel a travel request

Cancel a travel request when appropriate, such as when a meeting can be held virtually. You, your manager, or a user with the sn_imt_travel.approver role can cancel a travel request.

Before you begin

Role required: sn_imt_travel.approver or admin

Procedure

1. Navigate to **Employee Travel Safety** and select the appropriate module.

To	Select
Cancel your travel request	My Requests
Cancel a travel request for a direct report	My Employee's Requests
Cancel any employee travel request	View Travel Requests

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2. Open the travel request to cancel and verify that it is the correct request to cancel. You can't cancel a travel request that is complete.
3. Click **Cancel**.

Result
An email notification stating that the request was canceled is sent to the requester. The notification includes the name of the person who canceled the travel request.

Vaccination Status

The ServiceNow® Vaccination Status application gives HR departments the ability to track the status of user vaccinations in the workplace. Organizations can collect vaccination data for workforce planning, as needed based on business requirements, and report on the readiness of the workplace. Users are empowered to submit documentation of completed vaccinations to meet their organization's health and safety requirement for a safe return to the workplace, while administrators can track the status of user vaccination in the workplace. Status updates can be made manually by the user.

Use with other Safe Workplace suite applications

Vaccination Status is part of a suite of ServiceNow® Safe Workplace suite applications. Use it with these other applications to help your organization prepare its workforce and workplaces to resume operations after emergencies and pandemics like COVID-19.

- With the Employee Readiness Surveys application, evaluate the readiness of your users to return to the workplace by asking them to fill in a survey.
- Before users re-enter workspaces, use the Employee Health Screening application to screen users and ensure compliance with your entry requirements, such as a temperature check and PPE.
- With the Explore Workplace Core application, prepare for the return of users by configuring and maintaining clean and socially distanced workspaces for them to use.
- You can manage the inventory of safety equipment for your workforce with the Workplace Personal Protective Equipment Inventory Management application.
- With the Contact Tracing application, evaluate the readiness of your users to return to the workplace by using data such as badge scans, Wi-Fi access logs, and daily contact logs to help identify potential user interactions.

All Safe Workplace suite applications are available in the ServiceNow Store.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

ServiceNow is offering this application to government agencies and their authorized users, not to employees of government agencies in their individual capacities. Use of this application is being offered free of charge for a limited or extended time period and with no expectation of payment from the government agency to ServiceNow for use during that time period, nor does usage create an actual or implied future obligation on behalf of the government. ServiceNow hereby expressly waives any future claims for payment from the agency in connection with usage of the application. Government customers are solely responsible to confirm with the agency's Ethics Office or its authorized representative that acceptance and usage of the application is permissible.

All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Install Vaccination Status

You can install Vaccination Status if you have the admin role.

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Before you begin

Vaccination Status requires the ServiceNow® Employee Readiness Core and Emergency Outreach applications.

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Vaccination Status`.
3. Click **Install**.

   The Application installation dialog box opens.
4. Click **Activate**.

Components installed with Vaccination Status

Several types of components are installed with Vaccination Status, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles installed

Role title [name]	Description	Contains roles
Vaccination Status admin [sn_imt_vaccine.admin]	Application-specific admin for Vaccination Status. Can approve COVID-19 health test results in Health and Safety Testing. **Important:** By default, the System Administrator [admin] role contains the sn_imt_vaccine.admin role. The sn_imt_vaccine.admin role should be reassigned to another user and then removed from the admin. This process protects sensitive application data by restricting access to the application.	sn_imt_vaccine.profile_reader
Vaccine profile reader [sn_imt_vaccine.profile_reader]	Read-only access to the Vaccine profile [sn_imt_vaccine_vaccine_profile] table. Required to view vaccination status in contact tracing visualization.	None

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Tables installed

Table	Description
Vaccine profile [sn_imt_vaccine_vaccine_profile]	Shows which users received a COVID-19 vaccine. Users vaccinated until 14 days after receiving their vaccination their final dose (multi-dose vaccine). **Note:** The COVID-19 vaccine completed column ha 14-day vaccination period is complete. Organizations can make the vaccine complete status de a user reported receiving a vaccine booster when it bec *[sn_imt_vaccine.enforce_vaccination_co* property is enabled and a booster is due, the COVID-19 has a value of **false** for users who have not reported rec due date.
Vaccine response [sn_imt_vaccine_vaccine_response]	Contains a history of all reported vaccination statuses fo review their previously submitted vaccines in **My vaccin** Vaccine responses and their attachments are stored for organization's data retention policies. If the vaccine resp the expiration date, the reported statuses and attachme **Note:** Any historical data saved for use in the Vacc is count data only. Any personally identifying inform default and is deleted based on your organization's
Vaccine response definition [sn_imt_vaccine_vaccine_response_definition]	List of vaccines, including the type, manufacturer, and n By default, this table contains several generic COVID-19 Status admin can add and remove records to reflect the available to users.
Campus vaccine summary [sn_imt_vaccine_campus_vaccine_summary]	Stores vaccination data to map against data provided by Health Data Set in the Safe Workplace Dashboard Vacci vaccination data is pulled from the Vaccine response tal daily based at midnight (00:00) instance time.
Vaccine exemption requests [sn_imt_vaccine_vaccine_exemption]	Lists of vaccine exemption requests, their status, the exe date, and their status. Vaccine exemption requests witho not expire. Vaccine exemption requests are inactive by d Managers may view the exemption requests for their dir **Employee's exemptions** if this ability is enabled by their For more information, see Set up Vaccination Status pro
Validator service [sn_imt_vaccine_validator_service]	Stores information for validator services, such as Comm verify submitted vaccine responses and their attachmer
Vaccine response attachment type [sn_imt_vaccine_vaccine_response_attachment_type]	List of attachment types available for users to specify th providing. For example, the SMART health card attachm CommonTrust Network when performing validations.

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Table	Description
Vaccine code systems [sn_imt_vaccine_vaccine_code_system]	Lists common vaccine systems and standards used with the vaccine manufacturer of a user's submitted dose.
Vaccine codes [sn_imt_vaccine_vaccine_code]	Lists valid vaccine codes, such as CVX codes, obtained Control and Prevention (CDC) used to validate the manu a user's vaccine response. For a complete list of codes, Related Codes. **Note:** Vaccination Status provides some codes as

Set up Vaccination Status properties

Set up Vaccination Status properties to define the data retention period for user-reported vaccination status data, manage reminder emails, and enable exemptions.

Before you begin

Role required: sn_imt_vaccine.admin

Procedure

1. Navigate to **All** > **Vaccination Status** > **Properties**.
2. Set the following property values.

Property	Descrip
Vaccination Status data retention period (in days). [sn_imt_vaccine.data.retention.period]	Sets th status [sn_im The *Da* schedu past th The de the pro indefin *Statu* retenti **N** us an
Prevent admin from accessing attachments. [sn_imt_vaccine.prevent_admin_access_to_attachments]	Enable record admini inactiv
Frequency of reminders after 1st reminder. Default is set to 1, this will keep reminding users until they acknowledge. [sn_imt_vaccine.reminder_after_1st_reminder]	Sets h dose a sends 4 days The re The Va

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Property	Descrip
	date. T after th The va
Number of days before 2nd dose due date reminder. [sn_imt_vaccine.days_before_2nd_dose_due_date]	Sets w second is dete **Numbe** definiti due da The de
Number of days to send past due reminder before giving up. [sn_imt_vaccine.past_due_reminder_limit]	Numbe remind once th
Set reminders for booster. [sn_imt_vaccine.send_reminders_for_booster]	Enable booste Booste dose. C retenti data re admini
Frequency of booster reminders. [sn_imt_vaccine.booster_reminder_frequency]	Sets h booste
Number of days before booster due date reminder. [sn_imt_vaccine.remind_days_before_booster_due_date]	Sets th first re ○ A va last v **until** reco ○ A bo vacc **boos** the u
Number of days to send booster past due reminder before giving up. [sn_imt_vaccine.booster_past_due_reminder_limit]	Numbe remind
Set vaccine completed to false for users without booster. [sn_imt_vaccine.enforce_vaccination_complete_for_booster]	Enable comple receivi
Number of days to wait after booster due date before setting vaccine completed to false. [sn_imt_vaccine.set_covid19_completed_to_false_this_many_days_after_booster_due_date]	Sets th **false** w their b

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Property	Descrip
Reset Covid 19 Vaccine Complete to false if Vaccine Review Outcome is Rejected [sn_imt_vaccine.reset_covid_19_vaccine_complete_to_false_if_vaccine_review_outcome_is_rejected]	Enable the vac respor
Use country-specific data retention policy for Vaccination Status. [sn_imt_vaccine.use_country_specific_data_retention_policy]	Enable for Vac retenti are ret For exa anothe When value i proper
Allow managers the ability to update vaccine response records. [sn_imt_vaccine.allow_managers_ability_to_update_vaccine_response_records]	Enable vaccin the Ap role. Th
Allow managers the ability to update vaccine exemption requests. [sn_imt_vaccine.allow_managers_ability_to_update_vaccine_exemption_records]	Enable update reports [sn_im by defa
Allow vaccine exemptions. [sn_imt_vaccine.allow_vaccine_exemptions]	Enable exemp **Covid** default **N** **ex** th ap
Newly approved vaccine exemptions will have an expiration date set. [sn_imt_vaccine.new_vaccine_exemptions_temporary]	Enable once a
Days for temporary exemption if vaccine exemption expiration set to yes. [sn_imt_vaccine.temporary_exemption_days_until_expire]	Autom remain
Allow users to see Vaccine response work notes. [sn_imt_vaccine.allow_users_to_see_vaccine_response_work_notes]	Enable on thei
Allow users to see Vaccine exemption work notes. [sn_imt_vaccine.allow_users_to_see_vaccine_exemption_work_notes]	Enable on thei by defa
Allow validation engine approvals to update Vaccine Review Outcome records. [sn_imt_vaccine.allow_automated_response_approval]	Enable when a user's

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Property	Descrip
	a Smar respor match ○ First ○ Date ○ Vacc man This pr automa respor
Azure Form Recognizer confidence threshold, a decimal value between 0 and 1. [sn_imt_vaccine.azure_form_recognizer_confidence_threshold]	If your automa defaul meet f 0.90, ir Your o [*sn_i* proper Azure For mo the Azu

3. Click **Save**.

Automating vaccine response reviews

Your organization can automatically validate and review vaccine responses with Vaccination Status by integrating third-party validator services and enabling workflows.

Organizations may want methods to reduce the effort required to validate or approve vaccine responses in bulk. You can choose to automatically validate attachments used in vaccine reviews or automate the entire review process.

Validating vaccine responses

Validation systems work with Vaccination Status to review attachments in a user's vaccine response. First, the user attaches a supported attachment type, such as a SMART health card, and submits their vaccine response. The validator service API and the Vaccination Status flows analyze information from the attachment to see whether there is a match on the following items:

- First and last name
- Date received
- Vaccine code, such as CVX, to verify the vaccine manufacturer

For more information on submitting a vaccine response, see Report vaccination status to your organization.

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The validation process creates work notes on the vaccine response record about the validation process to inform you whether the review was completed, and if not, why. You can also see a user's vaccine response record that details each attachment reviewed.

Note: Work notes might not be comprehensive. If validation failed, you might want to investigate further to ensure that other information isn't also mismatched.

Once the validation is completed, you can review the vaccine response record to approve or deny the response. For more information on manually reviewing a vaccine response or confirming whether the validator service is working, see Confirm the reported vaccination status for a user.

To automate the validation process, you must do the following:

- Obtain credentials to integrate with the validator service of your choice.
- Create a connection and credentials alias for the validator service. For more information, see Create a Connection and Credential alias.
- Create a record for the validator service.
- Create a record for the attachment type the vaccine codes can be read from, such as a SMART health card.
- Create a subflow for the validator service. (A sample Validate vaccine response attachment template is available).
- Configure a vaccine code system used to read vaccine codes and validate submitted data. Some systems are included with Vaccination Status. Refer to your validator service for more information on the system they support.
- Configure a list of vaccine codes used by the vaccine code system. Some commonly supported codes are included with Vaccination Status.

  Note: Other commonly supported codes are provided by the Centers for Disease Control and Prevention (CDC). For more information, see COVID-19 Vaccine Related Codes.

- Activate the Auto-validate vaccine response flow to update the status of vaccine response reviews.

Automating Vaccine response reviews

Vaccination Status can automatically approve vaccine responses based on valid documentation and supported vaccine codes. Unapproved responses are left in the **Not yet reviewed** state so that Vaccination Status administrators or managers (if enabled) can perform a manual review.

To enable the automation of reviews, you must do the following:

- Configure Vaccination Status to automatically validate vaccine responses.
- Activate the *`Allow validation engine approvals to update Vaccine Review Outcome records`* property.

For more information on automating vaccine response reviews, see Automate reviews of vaccine responses.

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Provided services and integrations

Validator services provided with Vaccination Status

Validator services	Integration details
The CommonTrust Network	The CommonTrust Network is a supported integration and validator service in Vaccination Status. The following items are provided and supported by Vaccination Status to streamline the integration process for the CommonTrust Network: • An existing subflow, CommonTrust Network: Validate SMART Health Card • Records for CVX vaccine codes and the SMART health card vaccine system • SMART health card is available as an attachment type and linked to the CommonTrust Network validator service You must still obtain credentials for your organization to provide in the CommonTrust Network record. For more information on SMART health cards, see SMART Health Cards: Vaccination & Testing Implementation Guide. If you want to automate vaccine response reviews, see Automate reviews of vaccine responses.
Azure Form Recognizer service	Vaccination Status can integrate with Azure Form Recognizer. This integration enables the Azure Form Recognizer service to act as an alternate vaccine validation service. The Azure Form Recognizer service reads CDC Vaccination Cards and utilizes a trained machine-learning (ML) service, or model, to determine if there is a match for the user submitting the vaccine response. Validity is by the first and last name as each of these fields generates a confidence score provided by the Azure Form Recognizer service. This score is compared to the confidence threshold set in Vaccination Status. For more information, see Automating vaccine response reviews with the Azure Form Recognizer service. To configure Vaccination Status to use the Azure Form Recognizer service, see Configure

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Validator services provided with Vaccination Status (continued)

Validator services	Integration details
	Azure Form Recognizer integration for automatic vaccine response reviews.

Validate vaccine responses automatically

Configure Vaccination Status so that validator services can validate vaccine responses automatically with information from supported attachments.

Before you begin

Integrate with the validator service by doing the following:

- Obtain credentials for a validator service.
- Create a connection and credentials alias. For more information, see Create a Connection and Credential alias.

If your organization is using an integration that is already supported, such as the CommonTrust Network, then you need only to add your organization's credentials to the validator service record.

Role required: admin

Procedure

1. Configure the validator service.

   a. Navigate to **Vaccination Status** > **Validator services**.

   b. Select an existing validator service or, if you are creating a new one, click **New**.
   If you are selecting an integration that is already supported, such as the CommonTrust Network, you must enter your Connection alias and confirm the form is correct for your validator service.

   c. Fill in the fields on the form.

Validator service form

Field	Action
Name	The name of the validator service.
Connection alias	The connection alias for your validator service. For more information on creating a connection alias, see Create a Connection and Credential alias.
Validation subflow	The subflow used to confirm whether a submitted attachment is valid. A template flow is provided by default or you may create a flow and add it to this field. For more information on creating flows, see Create a flow.

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Field	Action
	If you create your own subflow, it must have the same inputs and outputs as the template subflow.
Initial validator state	The initial state the validator service starts in prior to the completion of the review, such as **Ready**. The recommended state is **Ready** unless there is a preprocessing step. **Note:** If the initial state is **Preprocessing**, then the redirect page must set the response record validator state to **Ready** so it works with the built-in validation flow.
Redirect page	(Optional) A reference to a service portal page the user will be redirected to after they report their vaccination.
Active	Option to activate the service.
Domain	The domain required for the validator service, such as **global**.

d. Click **Submit**.

2. **Optional:** Configure a vaccine code system used to read vaccine codes and validate submitted data.
   The vaccine code your system uses might be provided with Vaccination Status. Refer to your validator service's requirements for more information.
   a. Navigate to **Vaccination Status** > **Vaccine code systems**.
   b. Select **New**.
   c. Enter the name of the vaccine code system.
   d. Enter the URL for the vaccine code system.
   e. Select **Submit**.
3. Configure the vaccine response attachment type supported by the validator service.
   This attachment type users should use when they submit their vaccine responses.
   a. Navigate to **Vaccination Status** > **Attachment types**.
   b. Select **New**.
   c. Enter the name of the attachment type.
   d. Enter the name of the validator service.
   e. Enable the attachment type by selecting the **Active** check box.
   f. Set the domain to **global**.
   g. Select **Submit**.
4. **Optional:** Add common vaccine codes required by the vaccine code system and service.
   Common codes are provided with Vaccination Status. Refer to COVID-19 Vaccine Related Codes for additional common codes and the third-party service for codes their system supports.

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a. **Vaccination Status** > **Vaccine codes**.

b. Select **New**.

c. In the **Code System** field, add the corresponding system.

d. In the **Code** field, enter the code used to identify information about the vaccine.

e. Enter a description.

f. Select **Submit**.

5. Activate the Auto-validate vaccine response flow.

a. Navigate to **Process Automation** > **Flow Designer**.

b. Search for the Auto-validate vaccine response flow.

c. Select the flow.

d. Select **Activate**.

Result

You have enabled automated vaccine response validation. Work notes in the vaccine response record are updated with information on whether the attachments, and therefore the response, are valid. You can use this information to manually review vaccine responses in the approval portal.

What to do next

To automate vaccine response reviews so that they are set to **Approved** if validation was successful or left in the state **Not yet reviewed** (a manual review is required), see Automate reviews of vaccine responses.

Automate reviews of vaccine responses

Configure Vaccination Status to automatically approve reviews using the results of vaccine validations.

Before you begin

You must integrate with a third-party validator service and enable Vaccination Status to be able to automatically validate vaccine responses.

For more information, see Validate vaccine responses automatically.

Role required: admin

About this task

This process automates the entire review process so that validator engine can set a vaccine response to **Approved** or **Not yet reviewed** (needs a manual review). These results are based on the validation of vaccine responses. If you want only to validate vaccine responses and their attachments, you can choose to continue doing manual reviews in the approval portal. For more information, see Validate vaccine responses automatically.

Procedure

1. Navigate to **All** > **Vaccination Status** > **Properties**.
2. Locate the *`Allow validation engine approvals to update Vaccine Review Outcome records`* property and select **Yes**.
3. Click **Save**.

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Result
Automated vaccine response reviews are enabled for your organization. The validator engine will automatically determine whether a vaccine response is approved or needs a manual review based on information from the attachment type.

Automating vaccine response reviews with the Azure Form Recognizer service

Your organization can automatically review and validate vaccine responses with Vaccination Status by integrating with the Azure Form Recognizer service.

Validating vaccine responses with confidence scores

Vaccination Status can work with the Azure Form Recognizer Service to approve vaccine responses or flag them for further review. Use your own trained machine-learning (ML) service from Azure to read Centers for Disease Control and Prevention (CDC) Vaccine Cards or use the trained model provided by the ServiceNow® platform. If you use your own model, the fields compared must exactly match the names expected in the validation code. Currently, those fields are the **First Name** and **Last Name** fields.

- For more information on Azure Form Recognizer service, see Azure Form Recognizer documentation.
- For more information on the Azure Form Recognizer API used by default, see Form Recognizer 2021-09-30-preview.

When the Azure Form Recognizer service reads the uploaded CDC Vaccination Card, it generates a confidence score for each field. The confidence score is compared to the confidence threshold set by a Vaccination Status administrator in Vaccination Status. With a validation engine, the confidence threshold is used to approve or flag the user's response and update their vaccine profile.

- If the uploaded vaccination card passes the confidence threshold and matches the name on the user's vaccine profile, the vaccine response is approved.
- If the uploaded vaccination card has a name that does not match, the outcome of the review in the vaccine profile is updated to require a review (**Not yet reviewed**).

For more information on the validation engine used with the validator services, see the following topics:

- Automate reviews of vaccine responses
- Set up Vaccination Status properties

Integration details

The following items are provided and supported by Vaccination Status to streamline the integration process:

- An existing sub-flow, Azure Form Recognizer: Validate vaccination card
- CDC Vaccination Card is available as an attachment type and linked to the Azure Form Recognizer validator service

  Note: You must still obtain credentials for your organization to provide in the Azure Form Recognizer connection alias.

- A trained model that you can use when setting up your integration

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For more information on integrating with the service and enabling automatic reviews, see Configure Azure Form Recognizer integration for automatic vaccine response reviews.

Configure Azure Form Recognizer integration for automatic vaccine response reviews

As a Vaccination Status admin, configure Vaccination Status to work with Azure Form Recognizer service and automate vaccine response approvals.

Before you begin

To integrate with the Azure Form Recognizer service, you should do the following:

- Use Azure Form Recognizer and obtain connection credentials
- Train a machine-learning model if you are using your organization's own model for validation purposes

Role required: sn_imt_vaccine.admin

About this task

When you add your credentials to connect to the Azure Form Recognizer service, you may choose to use a ServiceNow -trained model or a model created by your organization.

- For more information on Azure Form Recognizer service, see Azure Form Recognizer documentation.
- For more information on the Azure Form Recognizer API used by default, see Form Recognizer 2021-09-30-preview.

Procedure

1. Enable the *`Allow validation engine approvals to update Vaccine Review Outcome records`* property to automate the approvals of vaccine responses.
   a. Navigate to **All** > **Vaccination Status** > **Properties**.
   b. Locate the *`Allow validation engine approvals to update Vaccine Review Outcome records`* property and select **Yes**.
2. Configure the Azure Recognizer service confidence threshold property used to validate Centers for Disease Control and Prevention (CDC) Vaccination Cards.
   The value in this step is the confidence level required by the service to determine that a submitted CDC Vaccination Card matches the user.
   a. Navigate to **All** > **Vaccination Status** > **Properties**.
   b. Navigate to the *`Azure Form Recognizer confidence threshold, a decimal value between 0 and 1`* [sn_imt_vaccine.azure_form_recognizer_confidence_threshold] property.
   c. Enter a decimal value to represent the confidence threshold required for a vaccine response to match.
   d. Select **Save**.
3. Add your connection credentials and trained model to the Azure Form Recognizer validator service.

Trained model	Steps
ServiceNow model	○ Add your connection credentials. **a.** Navigate to **All** > **Vaccination Status** > **Validator services**. **b.** Select **Azure Form Recognizer**.

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Trained model	Steps
	c. Open the sn_imt_vaccine.Azure_Form_Recognizer connection and credential alias. d. Select **Create New Connection and Credential**. e. Replace the Connection URL with the URL from your Azure Form Recognizer resource. For more information, see Create f. Enter a Model ID to use for your copy of the trained model in Azure Form Recognizer. g. Enter your API subscription key from your Azure Form Recognizer resource. h. Select **Create**. ○ Generate a model copy authorization with customer support or your account management team. **Note:** Contact ServiceNow Customer Service and Support or your account management team for "Vaccination Status – Azure Integration setup support". ServiceNow Customer Service and Support and your account management team can complete the steps required to add the trained model with you. Model copy authorizations only last for an hour.
Customer-trained model	a. Navigate to **All** > **Vaccination Status** > **Validator services**. b. Select **Azure Form Recognizer**. c. Open the sn_imt_vaccine.Azure_Form_Recognizer connection and credential alias. d. Select **Create New Connection and Credential**. e. Replace the Connection URL with the URL your Azure Form Recognizer resource. For more information, see Create a Form Recog f. Enter your Model ID from the trained model in Azure Form Recognizer. g. Enter your API subscription key from your Azure Form Recognizer resource. h. Select **Create**.

4. Activate the Auto-validate vaccine response flow.

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a. Navigate to **All** > **Process Automation** > **Flow Designer**.

b. Search for the Auto-validate vaccine response flow.

c. Select the flow.

d. Select **Activate**.

Result

When users add CDC Vaccination Card attachments to their vaccine responses and set the attachment type to CDC Vaccination Card, the following occurs:

- The card is read by the Azure Form Recognizer service and trained machine-learning (ML) model
- A confidence score is generated
- The confidence score is compared to the configured threshold
- The validation engine sets the Vaccine Review Outcomes based on whether the first and last names matched

Configure country-specific data retention settings for Vaccination Status

Configure the data retention settings for vaccine responses so your data retention policy is country-specific.

Before you begin

Role required: sn_imt_core.admin, sn_imt_health_test.admin, or sn_imt_vaccine.admin

About this task

Employers remain solely responsible for complying with their legal obligations under applicable law, including data protection laws on collection, use, disclosure, and retention of personal data, and should enable, choose not to enable, or customize any functionality available within the application to meet the Employers' specific requirements.

The **Vaccination Status data retention period (in days)** property sets the number of days that the user-reported vaccination status data is available in the Vaccine response table [sn_imt_vaccine_vaccine_response] before it is deleted automatically. The *Data Retention Job for Vaccination Status* scheduled job runs daily to delete records that have an updated date past the specified retention period.

Note: Any historical data retained for use in the Vaccination Status Dashboard is count data only. Personally identifying information is removed by default. If the vaccine responses are deleted before the duration is met, the reported statuses and attachments are deleted, too.

Enable the **Use country-specific data retention policy for Vaccination Status** property [sn_imt_vaccine.use_country_specific_data_retention_policy] and use the Data Retention module in Employee Health and Safety Status to define policies at the country-level.

Procedure

1. Navigate to **All** > **Vaccination Status** > **Properties**.
2. Set the **Use country-specific data retention policy for Vaccination Status** property to **true**.
3. Click **Save**.
4. Generate location policies for Vaccination Status.

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a. Navigate to **Employee Health and Safety Status** > **Data Retention**.

b. Click **Generate Location Policies**.
The default number of days is based off the value in the **Vaccination Status data retention period (in days)** property.

5. Open the location policy that you want to modify.
6. Enter the number of days that you want to retain data for in the **Retention period (in days)** field.
7. Click **Update**.

Result
When the *Data Retention Job for Vaccination Status* daily scheduled job completes or is manually executed, the data of users in those locations have their records retained or deleted based on their country's data retention policy.

Set up privacy consent for Vaccination Status

Set up privacy consent for users who are providing their vaccination data to your organization.

Before you begin
Role required: sn_imt_core.admin and sn_imt_checkin.checkin_admin

About this task
Use Emergency Outreach to send a privacy consent form to users. Users must agree to the privacy consent before they can submit their vaccination status.

Procedure
1. Customize the privacy consent template.

   a. Navigate to **Employee Health and Safety Status** > **Privacy Consent Templates** and click **Vaccine Administration**.

   b. Fill in the placeholder text with the name of your organization and contact information.

   Note: If you customize the privacy consent template with HTML, such as including tables or links, the HTML renders properly in the email that is sent to users. The HTML does not render in the privacy consent form when a user is submitting their response.

   c. Click **Update**.

2. Assign the sn_imt_core.privacy_consent_user role to all users who will be reporting their vaccination status.
   This role enables users to complete the privacy consent.
3. Add all users from the User [sys_user] table who will be reporting their vaccination status to a Safe Workplace audience.

   a. Navigate to **Emergency Outreach** > **Safe Workplace Audience** and click **Vaccine Privacy Consent Audience**.

   b. Add users to the audience.

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For detailed instructions about adding users to an audience, see Add a Safe Workplace audience.

c. Click **Update**.

4. Configure an outreach to send the privacy consent to users.

a. Navigate to **Emergency Outreach** > **View Outreaches** and click the **Vaccine Privacy Consent Placeholder** outreach.
This outreach is preconfigured to use the Vaccine Privacy Consent Audience and the Vaccine Administration privacy consent template.

b. Make any modifications to the outreach if needed, such as scheduling a time to send.
For detailed instructions about configuring an outreach, see Send notifications for an emergency.

c. **Optional:** Enable the outreach to provide location-specific privacy consents by selecting the **Use Country** option on the **Content configuration** tab.

(Optional) When enabled, the privacy statement text in Location Privacy Configuration takes precedence over text in the privacy consent templates. This text is used for the outreach, system notification email, and push notification. If you need to update the text that users receive, you must change the location's privacy statement.

For more information on updating a location's privacy statement, see Generate location-based privacy configurations.

d. Click **Update**.

Configure vaccine or vaccine booster types for Vaccination Status

Create or modify vaccine or vaccine booster types that people can use to report their vaccination status.

Before you begin
Role required: sn_imt_vaccine.admin

About this task
Vaccine and vaccine booster reporting requires Vaccine response definition records. Each record contains vaccine-specific information so that users can properly report their vaccination status with the correct type of vaccine. For example, you can create a record for single-dose or multi-dose vaccine and set the number of days between doses. These configurations determine the questions users must answer when reporting their vaccination. Vaccination Status contains several generic COVID-19 vaccines that do not require configuration.

Procedure

1. Navigate to **All** > **Vaccination status** > **Vaccine response definitions**.
2. Click **New** or open a record.
3. On the form, fill in the fields.

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Vaccine response definition form

Field	Description
Vaccine type	The type of vaccine, such as a COVID-19 mRNA vaccine or a vaccine booster.
Manufacturer	The name of the vaccine manufacturer.
SMS friendly name	A display name for the vaccine that displays in SMS messages.
Number of doses required	Number of doses required for full vaccination.
Booster parent vaccine	The parent vaccine the booster supports, such as a booster for a COVID-19 mRNA vaccine. **Note:** The **Booster parent vaccine** field appears only when you set the **Vaccine type** to **Booster**.
Recommended days until booster required	Number of days since vaccination before a booster is required. This field is visible only if **Vaccine type** is set to **Booster**.

4. Click **Submit**.

Virtual Agent conversations for Vaccination Status

Vaccination Status provides a Virtual Agent conversation that enables users to report their vaccination status via SMS.

A ServiceNow® Virtual Agent conversation topic defines the dialog between the Virtual Agent (chatbot) and the user to accomplish a specific goal. The provided Vaccine conversation topic asks whether the user has been vaccinated, the date that they received the vaccine, and the type of vaccine that they received.

Installation and setup requirements

To use Virtual Agent with SMS, your organization must have a Twilio account and phone number. You must also install the Virtual Agent plugin (com.glide.cs.chatbot) and set up the Conversational SMS Integration with Twilio application (sn_va_sms_twilio). For more information, see Set up the Conversational SMS Integration with Twilio.

On-premise customers who install the Safe Workplace applications in the Rome release for the first time require a scoped admin role to create an approved scope-to-scope Restricted Caller Access (RCA) record in Vaccination Status. This cross-scoped access is required for Conversational SMS Integration with Twilio to function in the Vaccination Status application.

The RCA record should have the following values set:

Field	Value
Source Scope	Emergency Outreach
Source Type	Scope

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Field	Value
Status	Vaccination Status
Application	Vaccination Status
Target Type	Scope

For more information on creating caller access records, see Set application scope, application resource, and event access.

Configuration

To receive SMS messages for Vaccination Status, users must have a mobile phone number listed on their user record [sys_user]. Mobile numbers must be in E.164 format. For example, `+18585551212`.

Privacy consent for Vaccination Status must be configured before users can report their vaccination status via SMS. For instructions, see Set up privacy consent for Vaccination Status.

Note: Users must agree to the privacy consent before they can submit their vaccination status. The Vaccine conversation topic prompts users to complete the privacy consent via SMS if they haven't already submitted their consent. Users must belong to an audience associated with a vaccine privacy consent outreach to be able to complete the privacy consent via SMS.

Vaccination Status uses an SMS outreach to let users know that they can report their vaccination status via SMS. The outreach provides users with the information that they need to begin interacting with the Vaccine Virtual Agent conversation. To configure the outreach, add users to the placeholder Vaccination status request audience. For detailed instructions about adding users to an audience, see Add a Safe Workplace audience. Then, add the audience to the placeholder Vaccination status request outreach and make any modifications to the outreach if needed, such as scheduling a time to send.

Once users receive the SMS outreach, they can report their vaccination status through the Vaccine Virtual Agent conversation. The Vaccine conversation topic is ready to use without modifications, but can be customized to meet your organization's requirements. To view or edit the Vaccine conversation topic, navigate to **Collaboration** > **Virtual Agent** > **Designer**. For more information about updating conversation topics, see Virtual Agent Designer.

The Vaccine conversation provides the user with options to select which type of vaccine they received. These options are pulled from the Vaccine response definition table [sn_imt_vaccine_vaccine_response_definition]. To set the display name for a vaccine type, enter the name in the **SMS friendly name** field on the vaccine response definition record.

Report vaccination status to your organization

Provide your organization with information about whether you received a vaccine and the date that you received it.

Before you begin

Before you can submit your vaccination status, you must respond to the vaccine privacy consent.

Note: Vaccine admins can report a user's vaccination status for them, however, the admin must first respond to the vaccine privacy consent.

Role required: sn_imt_core.privacy_consent_user

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About this task

You can report your vaccination status to meet the requirements of your organization. Along with the fillable form, you may include any attachments that may be necessary, such as a SMART health card, Centers for Disease Control and Prevention (CDC) Vaccination Card, or any other form of verification that your organization may require.

Note: For automatic vaccine validation, your organization must configure their instances to support the SMART health card or CDC Vaccination Card attachment types.

Validator Services and Attachment Types

Validator Service	Attachment Type
The CommonTrust Network	SMART health card
Azure Form Recognizer service	CDC Vaccination Card

Procedure

1. Navigate to **All** > **Vaccination Status** > **Report vaccination**.

   Note: To report your or another user's vaccination status in the Now Mobile app, navigate to **Health** > **Follow These Safety Practices** > **Report Vaccination**.

2. Determine the user you are submitting vaccination status for.
   - If you are a Vaccine admin, submit your vaccination status or another user's status by selecting the user you are submitting information for, and complete the Report Vaccination form.
   - If you are not an admin, complete the Report Vaccination form.
3. On the form, fill in the fields.

Report Vaccination form

Field	Description
Do you want to add vaccine dose information?	The vaccine dose information that you want to provide. ○ Selecting **Yes** reveals the fields required to submit vaccine dose or booster information. ○ Selecting **No** confirms that you do not have vaccine doses or boosters to add. ○ Selecting **Prefer not to say** confirms that you do not want to share your vaccine dose or booster information.
Vaccine	The type of vaccine or booster that you received. If you select a vaccine that requires more than one dose, such as **Covid-19 2 dose unknown manufacturer**, or you want to submit multiple different vaccines, you can select how many doses you want to report in

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Field	Description
	the **How many doses do you wish to report?** field. **Note:** The **Vaccine** field appears only when **Yes** is selected as the answer to **Have you been vaccinated?**. Additional **Vaccine** fields appear if you are reporting more than one dose.
How many doses do you wish to report?	The number of doses that you are reporting. If you select more than one dose, additional **Vaccine** and **Date administered** fields appear for each dose. For example, you can report multiple doses for the same vaccine, multiple vaccines, or a booster with your vaccine doses.
Date administered	The date that you received your dose. If you are reporting more than one dose, add the date administered for each dose or booster (**Second date administered**, **Third date administered**, or **Fourth date administered**). The date that you received your first dose.
Attachment type	The type of attachment that you are submitting if it is required by a validator service to automatically review your vaccinations. For example, a SMART health card or CDC Vaccination Card can be used to automatically validate vaccine responses if enabled by your organization. **Note:** **Attachment type** is not a required field for all attachments. You can submit images or other documentation that might require manual review.

4. **Optional:** Add attachments, such as a SMART health card or an image of supporting documentation, by selecting **Add attachments**.

   (Optional) For more information on supported formats, see Document Viewer.

   Note: If you are adding an attachment required by a validator service, ensure that you've selected the correct **Attachment type**.

5. Click **Submit**.
   - If you are a Vaccine admin, you are returned to an empty Report Vaccination form to submit another vaccination.
   - If you are a user, you are returned to the health and safety status page.

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What to do next

Your organization might require that you be vaccinated before returning to the site. To check your progress on all site entry requirements, see View your health and safety status.

Note: You are not considered fully vaccinated until 14 days after receiving your vaccination (single-dose vaccine) or your final dose (multi-dose vaccine).

Depending on your organization's requirements, if your vaccine has a vaccine booster available, you might not be considered fully vaccinated until you report receiving your booster.

Review your vaccine responses

If you would like to review your recently reported COVID-19 vaccinations or add an attachment to a record, access your previous vaccine responses.

Before you begin

Role required: sn_imt_core.privacy_consent_user

Procedure

1. Navigate to **All** > **Vaccination Status** > **My vaccinations**.
2. Select the vaccine response that you would like to add an attachment to or review.
3. Modify the record by adding an attachment or review the record.
   - If you are adding an attachment, such as proof of vaccination, add the attachment and then click **Update**.

     Note: For information on managing attachments, see Manage attachments.
   - If you are reviewing the record, review the record and click **Back** to return to the list of vaccine responses.

Confirm the reported vaccination status for a user

As a Vaccination Status admin or manager, use the Employee Readiness Core Approval Portal to confirm a user's reported COVID-19 vaccination status.

Before you begin

Your organization must install both Health and Safety Testing and Vaccination Status to use the Approval Portal.

- For more information on installing Health and Safety Testing, see Install Health and Safety Testing.
- For more information on installing Vaccination Status, see Install Vaccination Status.

Activate the *sn_imt_vaccine.allow_managers_ability_to_update_vaccine_response_records* property to enable all managers to confirm the reported vaccination status of their direct reports. This property assigns the sn_imt_core.approval_portal_manager role to managers and grants access to the Approval Portal for vaccine responses.

Role required: sn_imt_vaccine.admin, sn_imt_core.approval_portal_manager, or sn_imt_core.health_and_safety_approver

About this task

In the Approval Portal, you can review the results of user-reported vaccinations and approve or reject the responses. Approvals can be based on a user's proof of vaccination, such as their attachments submitted with their vaccine response. If the *Reset Covid 19 Vaccine*

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Complete to false if Vaccine Review Outcome is Rejected property is enabled, a user's COVID-19 vaccine completed status depends on the responses being approved.

Note: Managers can only confirm the vaccine responses only of their direct reports. Vaccine admins and health and safety approvers can confirm the responses of all users.

For more information, see Set up Vaccination Status properties.

Organizations that want to automatically review vaccine responses must configure Vaccination Status to support the functionality. For more information, see Automate reviews of vaccine responses.

Procedure

1. Navigate to **Employee Health and Safety Status** > **Approval Portal**.
   The default view displays all health test, vaccine dose, and exemption request records that require review.
2. **Optional:** Filter the results.
   - Change which record types are displayed by selecting a record type from the **Record** field list.
   - Change how the records are sorted by selecting a value from the **Sort** field list.
3. Search for the user whose vaccination status you want to confirm.
   The search behavior for the Approval Portal is a *starts with* search.
4. Select the record to review the information included in the Vaccine response modal and any attachments.

Vaccine response modal

Field	Description
Manufacturer	The manufacturer of the vaccine or booster dose.
Date administered	Date the vaccine or booster was administered.
Vaccine reviewed date	Date the vaccine response was reviewed.
Verified by	Who verified the vaccine response.
Vaccine review outcome	The result of the vaccine review, such as whether it was approved or denied.
Validator state	If your organization enables the ability for Vaccination Status to automatically validate vaccinations with validator services, such as CommonTrust Network, this field populates based on the review. A status of **Complete** indicates that the validator was able to successfully run. The results of the validation are included in the work notes.
Work notes	A log of work notes included for tracking purposes.

5. **Optional:** Add additional information to the record in the work notes and click **Save**.
   The ability to add work notes is unavailable to managers.

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6. Approve or reject the user's submitted vaccination status.
   - To approve the user's vaccination status, click **Approve**.
   - To reject the user's vaccination status, click **Deny**.

Result
The record is moved to the **Approved** or **Denied** tab based on your decision and the **Verified by** field in the user's vaccine response record is updated with your name. Based on your organization's configurations, your review might affect the user's COVID-19 vaccine complete status.

For more information on configuring Vaccination Status, see Set up Vaccination Status properties.

Request a vaccine exemption

Request a vaccine exemption from your organization with information about why you require an exemption.

Before you begin
Vaccine exemptions must be enabled by your organization to submit vaccine exemption requests. If you do not see the Request vaccine exemption module or you are unable to submit vaccine exemption requests, refer to your administrator to enable this feature.

Role required: none

Procedure
1. Navigate to **All** > **Vaccination Status** > **Request vaccine exemption**.

   Note: To request a vaccine exemption in the Now Mobile app, navigate to **Health** > **Follow These Safety Practices** > **Request Vaccine Exemption**.

2. On the form, fill in the fields.

Request Vaccine Exemption form

Field	Description
What is the vaccine exemption type?	The type of exemption you are requesting. Available values are religious, medical, or other.
Details for vaccination exemption request	Provide any useful additional details about the request for your organization.

3. **Optional:** Add any relevant attachments to the form.
4. Click **Submit**.
5. **Optional:** Review the status of your vaccine exemption request by navigating to **Health** > **Follow These Safety Practices** > **Vaccine Exemption Requests** in the Now Mobile app.

Result
Your vaccine exemption request is submitted to your organization for an administrator or a manager to review.

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Confirm a vaccine exemption request for a user

As a Vaccination Status admin or manager, use the Employee Readiness Core Approval Portal to approve or deny a user's vaccine exemption request.

Before you begin

Your organization must install both Health and Safety Testing and Vaccination Status to use the Approval Portal.

- For more information on installing Health and Safety Testing, see Install Health and Safety Testing.
- For more information on installing Vaccination Status, see Install Vaccination Status.

Activate the *sn_imt_vaccine.allow_managers_ability_to_update_vaccine_exemption_records* property to enable all managers to approve or deny vaccine exemption requests for their direct reports. This property assigns the sn_imt_core.approval_portal_manager role to managers and grants access to the Approval Portal for vaccine exemption requests.

Your organization must enable vaccine exemptions. Exemptions do not affect a user's **Covid 19 Vaccine Complete** status in their vaccine profile. For more information, see Set up Vaccination Status properties.

Role required: sn_imt_vaccine.admin, sn_imt_core.approval_portal_manager, or sn_imt_core.health_and_safety_approver

About this task

Managers can only approve or deny the vaccine exemption requests of their direct reports. Vaccine admins and health and safety approvers can approve or deny the requests of all users.

Procedure

1. Navigate to **Employee Health and Safety Status** > **Approval Portal**.
   The default view displays all health test, vaccine dose, and exemption request records that require review.
2. **Optional:** Filter the results.
   - Change which record types are displayed by selecting a record type from the **Record** field list.
   - Change how the records are sorted by selecting a value from the **Sort** field list.
3. Search for the user whose exemption request you want to approve or deny.
4. **Optional:** Select the user's attachments to review any submitted documentation.
5. Select the record you want to review in the Vaccine exemption modal.

Vaccine exemption modal

Field	Description
Exemption type	Type of exemption being requested.
Status	Status of the exemption. The default status of an open exemption is **Submitted**.
Status updated by	Name of the admin or manager who updated the status of the user's request.

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Field	Description
Expiration date	The date the exemption expires. If this field is blank, the exemption does not expire. **Note:** If no expiration date is set manually or by your organization's configuration, the exemption does not expire. You can update this field in the modal or Vaccine Exemption Request record. If you need to update this field in the modal, manually enter an expiration date or pick from the calendar.
Details	Details related to the exemption request.
Work notes	A log of work notes included for tracking purposes.

6. **Optional:** Add additional information to the record in the work notes and click **Save**.
   The ability to add work notes is unavailable to managers.
7. Approve or deny the user's submitted exemption request.
   - To approve the user's exemption request, click **Approve**.
   - To reject the user's exemption request, click **Deny**

Result
The record is moved to the **Approved** or **Denied** tab based on your decision. The user's vaccine profile is updated to show who approved the vaccination exemption (if approved) and when it expires (if applicable).

Viewing vaccine profile records

Vaccine profiles contain vaccination information for vaccine admins to review, such as a user's vaccination date, whether users are exempt from receiving a vaccine, or the results of their most recent COVID-19 tests.

Vaccine profile records

You can access vaccine profile records and view a user's booster dose due date by navigating to **All** > **Vaccination Status** > **Vaccine profiles**. Then you can create a record or select an existing record to review.

Note: You must have the Vaccine profile reader role or Vaccination Status admin role to view vaccine profile records.

In addition to the fields on the profile records, you can review additional details about a user, such as the dates for different manufacturers and doses and the status of a user's exemption request.

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Vaccine profile records

Field	Description
COVID-19 vaccine completed	Indicates whether a user is considered fully vaccinated. This status depends on a number of factors such as the type of vaccine, how your organization configures various system properties, and whether a booster is due.
User	Name of the user.
Vaccine exemption approved by	Name of the scoped administrator or manager who approved an exemption from requiring a COVID-19 vaccine for the user.
Vaccine exemption expiration date	Date that the vaccine exemption expires as set by the scoped administrator or manager.
Most recent COVID test date	Date that a COVID-19 test was most recently reported for the user.
Most recent COVID test result	The user's most recently reported COVID-19 test result.
Most recent COVID test result verified	Indicates that the most recently reported COVID-19 test result was verified by a scoped manager or administrator. For more information, see Confirm COVID-19 test results for a user.
Vaccine Review Outcome	The outcome of a user's most recently reported COVID-19 vaccine. This field is updated when the vaccine was reviewed by a Vaccination Status admin, manager, or validator service. The review outcome depends on your organization's review process and system configuration. If it was reviewed, it is either approved or rejected. **Note:** A validator service can only approve reviews or leave them in the same status as if they had not been reviewed. If the vaccine response could not be validated and approved, the response must be manually reviewed. For more information, see Confirm the reported vaccination status for a user.

Vaccination Status dashboard

Use the Vaccination Status dashboard to review reports that can provide insight into the vaccination status of your organization.

To access the Vaccination Status dashboard, navigate to **Self-Service** > **Dashboards**.

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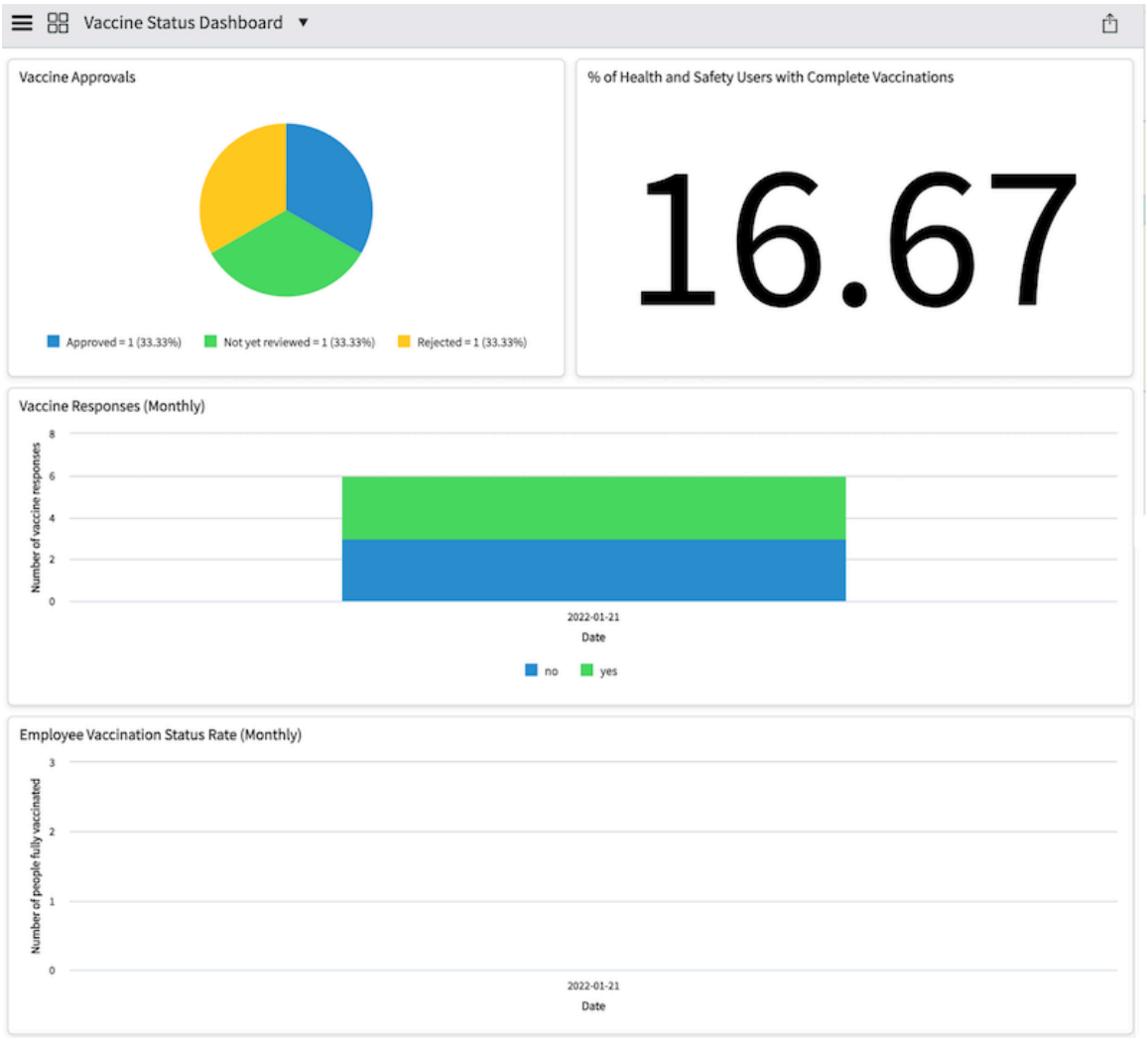

End user and goals

End user and goal	Required role	Benefits
Vaccination Status administrator: Review how well vaccination goals are being met and whether vaccine responses are being reported by the organization's users.	sn_imt_vaccine.admin	• Review the number of vaccine approvals that have been reviewed • Monitor the percentage of Employee Health and Safety Status users who have been vaccinated • Monitor the number of monthly vaccine responses for your organization • Monitor the monthly vaccine response rate for your organization

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End user and goal	Required role	Benefits
Employee Readiness Core admin: Must determine employee readiness and understand core vaccination metrics, such as the percentage of users who are or are not vaccinated.	sn_imt_core.admin	• Review the number of vaccine approvals that have been reviewed • Monitor the percentage of Employee Health and Safety Status users who have been vaccinated • Monitor the number of monthly vaccine responses for your organization • Monitor the monthly vaccine response rate for your organization

Data visualizations

Title	Type	Description
Vaccine Approvals	Pie breakdown 	A breakdown of vaccine approvals by type: • The number of vaccine responses that are approved • The number of vaccine responses awaiting review • The number of vaccine responses that are rejected
% of Health and Safety Users with Complete Vaccinations	Single score 	Displays the percentage of health and safety users in your organization that are considered vaccine complete. **Note:** Vaccine complete depends on your organization's configurations and what number of vaccines (doses, boosters) count as vaccine complete.
Vaccine Responses (Monthly)	Stacked bar chart 	Compares how many vaccine responses were received (yes) versus how many vaccine responses were not received (no) at a monthly rate.
Employee Vaccination Status Rate (Monthly)	Line	Indicates the number of people fully vaccinated.

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Title	Type	Description
		The rate is determined by the number of users in your organization with their vaccination profile COVID-19 completed status marked as true. **Note:** A historical data collection job, *Generate vaccine history records*, runs daily to ensure that the report chart is up-to-date.

Integrating with Safe Workplace suite

Integrate ServiceNow Safe Workplace suite data with a third-party system. For example, you can integrate Employee Health Screening data with badge reader software to ensure compliance with your workplace entry requirements.

Benefits

Integrate with Safe Workplace suite :

- Ensure compliance with your workplace entry requirements.
- Improve efficiency between multiple systems.
- Ensure accuracy and safety across systems by maintaining a single source of data.

Integrations

You can integrate with Safe Workplace suite in these ways:

Subscribe to request for entry updates

Send the result of each Employee Health Screening entry request to a third-party system by configuring a webhook.

Send data to the Employee Health Screening log

Send data from a third-party system to the Employee Health Screening application log table. You can use this table to create reports and monitor health trends.

Get employee or visitor health data

Send a GET request for Employee Health and Safety Status data to use in your third-party system. Get data to determine an employee or visitor's current health status.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Subscribe to request for entry updates

Send the result of each Employee Health Screening entry request to a third-party system by configuring a webhook.

Before you begin

Sending outbound webhook calls requires the following plugins.

- ServiceNow Integration Hub Runtime (com.glide.hub.integration.runtime)
- Workflow Studio Action Step - Payload Builder (com.glide.hub.action_step.payload)
- ServiceNow Integration Hub Action Step - REST (com.glide.hub.action_step.rest)

These plugins must be requested through the Now Support Service Catalog. For instructions, see Request a plugin.

When you set up the webhook, the system automatically sends a REST request to a third-party endpoint every time an employee or visitor requests entry. Work with an administrator for the third-party system to determine the correct endpoint to provide.

Note: The webhook does not include authentication headers in the request. Ensure that you provide an endpoint that includes query parameters to authenticate the request.

To learn more about the Employee Health Screening Request Entry module, see Conduct a health screen for entry.

Role required: sn_imt_core.admin or admin

Procedure

1. Navigate to **All** > **Employee Health and Safety Status** > **Outbound Webhooks**.
2. In the Webhook [sn_imt_core_webhook] table, click **New**.
3. On the form, fill in the fields.

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Webhook form

Field	Description
Name	Internal identifier for the third-party endpoint.
Event	Event that you want to subscribe to. Options include: ○ **Employee requested entry**: Sends an update every time an employee requests entry. ○ **Visitor requested entry**: Sends an update every time a visitor requests entry.
Endpoint	Endpoint to send the Employee Health Screening Request Entry data to. **Note:** The webhook does not include authentication headers in the request. Ensure that you provide an endpoint that includes query parameters to authenticate the request.
Secure parameters	Query parameters for the endpoint that must be handled securely, such as an authorization token. Provide parameters in the format `?param1=value&param2=othervalue`. **Tip:** If the third-party system that you're sending data to doesn't provide a securely generated authorization token, you can generate a token in your ServiceNow instance with the following script. `var secureRandom = GlideSecureRandomUtil; var secret = secureRandom.getSecureRandomString(30); gs.log(secret);`
Active	Option to set the record to active.

4. Click **Submit**.

Result

The Employee Health Screening application sends request entry data to the third-party endpoint every time an employee requests entry. The JSON payload contains the following data.

```
{
  "event": "entry.requested",
  "email": "aileen.mottern@example.com",
  "username": "aileen.mottern",
  "user_id": "a8f98bb0eb32010045e1a5115206fe3a",
  "location": "San Antonio",
  "location_id": "108486c7c611227500b093211aa88dcc",
  "access_granted": false,
  "updated": "2020-07-01 22:19:03"
}
```

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Property	Description
event	Type of event defined in the Webhook table. Data type: String
email	Email address of the employee. Data type: String
username	Username of the employee from the Health and Safety Users [sn_imt_core_health_and_safety_user] table. Data type: String
user_id	Sys_id of the user record from the Health and Safety Users [sn_imt_core_health_and_safety_user] table. Data type: String
location	Location of the health screening. Data type: String
location_id	Sys_id of the location record from the Location [cmn_location] table. Data type: String
access_granted	Flag that indicates whether the employee was granted access as a result of the health screening. Valid values: • **true**: The employee passed the health screening and was granted access. • **false**: The employee did not pass the health screening and was not granted access. Data type: Boolean
updated	Date and time when the employee or visitor requested entry. Data type: Date/Time

Send data to the Employee Health Screening log

Send data from a third-party system to the Employee Health Screening application log table. You can use this table to create reports and monitor health trends.

Before you begin

Role required: sn_imt_core.api_logging_user

Procedure

1. Send a POST request to the Table API on your instance.
   For more information, see Table API.

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a. Construct the endpoint using the Log Import [sn_imt_core_log_import] table.

Example

```
https://<your-instance>.servicenow.com/api/now/table/sn_imt_core_log_import
```

b. Set fields in the Log table by defining these request body parameters.

Field	Description
Source	Internal name to identify the third-party system making the log entry.
Level	User status, log level, or any other meaningful string. For example, you can enter `Allowed` or `Denied` to indicate whether the individual is cleared for entry.
Message	Description of the health screening. For example, `Temp too high`.
User	Employee or visitor email from the Health and Safety User [sn_imt_core_health_and_safety_user] table.
Additional Info	Data to provide any additional information. For example, `{'temperature':'101', 'location':'San Diego'}`.

Example
This example cURL request sends a record to the Log Import table.

```
curl
 "http://<your-instance>.servicenow.com/api/now/table/sn_imt_core_log_import" \
--request POST \
--header "Accept:application/json" \
--header "Content-Type:application/json" \
--data "{\"u_source\":\"BadgesRUs\",\"u_message\":\"Temp too
 high\",\"u_user\":\"abel.tutor@servicenow.com\",\"u_level\":
\"Denied\"}" \
--user 'username':'password'
```

The system automatically inserts the record into the Log [sn_imt_core_log] table.

2. Navigate to the Log [sn_imt_core_log] table to check that the data imported correctly.

What to do next

Generate reports on the data you imported to the Log [sn_imt_core_log] table using Reporting.

Get employee or visitor health data

Send a GET request for Employee Health and Safety Status data to use in your third-party system. Get data to determine an employee or visitor's current health status.

Before you begin

Role required: sn_imt_core.reader

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Procedure

Send a GET request to the Table API on your instance.
For more information, see Table API.

a. Construct the endpoint using the Health and Safety User [sn_imt_core_health_and_safety_user] table.

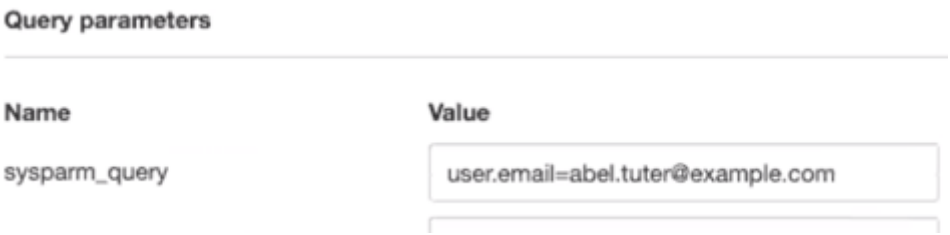
Example

```
https://<your-instance>.servicenow.com/api/now/table/sn_imt_core_health_and_safety_user
```

b. Add a query parameter to query a specific user's email address.

In the API explorer, you can enter one of the following strings in the **sysparm_query** field to generate an endpoint that includes the correct query parameter:

- `user.email=<user-email-address>`: Queries the provided employee's email address.
- `visitor.email=<visitor-email-address>`: Queries the provided visitor's email address.



Example
This example cURL request queries the Health and Safety User table and returns records associated with Abel Tuter's email address.

```
curl
 "http://<your-instance>.servicenow.com/api/now/table/sn_imt_core_health_and_safety_user?sysparm_query=user.email%3Dabel.tuter%40example.com&sysparm_limit=1" \
--request GET \
--header "Accept:application/json" \
--user 'username':'password'
```

Result
The Employee Health and Safety Status application returns the Health and Safety User record associated with the email address in the request. The JSON payload contains the following data.

```
{
  "result": [
    {
      "sys_mod_count": "0",
      "sys_updated_on": "2020-07-14 19:58:00",
      "sys_tags": "",
      "type": "employee",
      "sys_id": "33f184491bce9010e3730e16ec4bcb71",
      "sys_updated_by": "system.administrator",
```

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```
      "manually_created": "true",
      "sys_created_on": "2020-07-14 19:58:00",
      "sys_domain": {
        "link":
 "https://<my-instance>.servicenow.com/api/now/table/sys_user_gr
oup/global",
        "value": "global"
      },
      "requirements_status": "cleared",
      "visitor": "",
      "user": {
        "link":
 "https://<my-instance>.servicenow.com/api/now/table/sys_user/62
826bf03710200044e0bfc8bcbe5df1",
        "value": "62826bf03710200044e0bfc8bcbe5df1"
      },
      "sys_created_by": "system.administrator"
    }
  ]
}
```


All fields are internal, except for the following:

Property	Description
requirements_status	Whether the visitor or employee has completed all requirements to return to the workplace. For more information, see Create health and safety user records and Create a health and safety requirement. • Cleared: The visitor or employee has completed all requirements to return to the workplace. • Not Cleared: The visitor or employee has not completed all requirements to return to the workplace. Data type: String
visitor	If present, this record represents a visitor instead of an employee. **Note:** Only used when returning visitor health data. Data type: Object
visitor.link	Link to the visitor record on the instance. **Note:** Only used when returning visitor health data. Data type: String
visitor.value	Sys_id of the visitor record. **Note:** Only used when returning visitor health data. Data type: String
user	If present, this record represents an employee instead of a visitor. **Note:** Only used when returning employee health data.

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Property	Description
	Data type: Object
user.link	Link to the user record on the instance. **Note:** Only used when returning employee health data. Data type: String
user.value	Sys_id of the user record. **Note:** Only used when returning employee health data. Data type: String

Safe Workplace for mobile

Manage the essential steps for return to workplace from anywhere using the Safe Workplace for mobile app.

The ServiceNow® Safe Workplace mobile experience enables organizations to manage the essential steps for returning users to the workplace from anywhere with the Now Mobile app. With an intuitive mobile design and user-friendly interface, organizations can deliver a seamless return to workplace experience, enabling users to complete health screenings and surveys, set up visits, make reservations, request PPE, and more to support their health and safety.

Application Views

Access other applications from Safe Workplace for mobile

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

Emergency and Safe Workplace Applications

Emergency Response Management applications	Safe Workplace applications
• Emergency Outreach • Emergency Self Report • Emergency Exposure Management	• Employee Readiness Surveys • Employee Health Screening • Workplace Core • Workplace PPE Inventory Management • Safe Workplace Dashboard • Contact Tracing • Health and Safety Testing • Employee Readiness Core • Enterprise Employee Experience Pack

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Emergency and Safe Workplace Applications (continued)

Emergency Response Management applications	Safe Workplace applications
	• Employee Travel Safety • Vaccination Status

Safe Workplace for mobile features

Safe Workplace (Mobile) Reporting and Notification Features

	Receive and respond to outreach notifications Receive important notifications generated in the Emergency Outreach application on your mobile device. You can also self-report your health status through these notifications. For more information about Emergency Outreach, see Emergency Outreach. For information on how to report your health status through push notifications, see Report your health status.
	Report your health status on the service response dashboard Under My Current Health Status, click your name to report your health status. For more information, see Report your health status in Now Mobile.
	View the status of your direct reports As a manager, you can view **My Team's Health** in the **My Team** section to see an overview of the health of your direct reports. For more information, see Manage the status of your direct reports in Now Mobile.
	Reassign critical tasks to your working employees As a manager, you can tap **My Direct Reports Open Tasks** in the **My Team** section to see the work assigned to your direct reports. From this list, you can reassign tasks, as needed, to your working direct reports. For more information, see Reassign tasks to your team members in Now Mobile.

Mobile sections

If you've subscribed to the Safe Workplace suite, you see the Mobile sections available for Mobile experience for Emergency Response Management. Each section has multiple applications. To see all applications under a topic, scroll left.

Sections related to mobile application topics and features

Follow these safety practices	Health screening	Manage PPE inventory
Health surveys	Screen employee	Assign consumable

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Sections related to mobile application topics and features (continued)

Follow these safety practices	Health screening	Manage PPE inventory
For more information, see Employee Readiness Surveys.	For more information, see Conduct a health screen for entry.	For more information, see Assign PPE to employees.
Verify my health For more information, see Verify your health status and compliance.	Screen visitor For more information, see Screen a visitor for entry to the workplace.	Assign hardware For more information, see Assign PPE to employees.
Request PPE For more information, see Request PPE.	Scan for entry For more information, see Collecting user badge data.	Add consumable For more information, see Add PPE stock.
Daily contact log For more information, see Tracking employee contacts using daily logs.	Employee status For more information, see View your health and safety status.	Add hardware For more information, see Add PPE stock.
Privacy Consent For more information, see User privacy consent for Contact Tracing.		Add model For more information, see Create models for PPE items.
Set up a visit For more information, see Invite a visitor to the workplace.		
COVID-19 Testing For more information, see Request a COVID-19 diagnostic test.		
Request travel permission For more information, see Request permission to travel.		
Report Vaccination For more information, see Report vaccination status to your organization.		
Request Vaccine Exemption		

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Sections related to mobile application topics and features (continued)

Follow these safety practices	Health screening	Manage PPE inventory
For more information, see Request a vaccine exemption.		
Vaccine Exemption Requests For more information, see Request a vaccine exemption.		

Sections related to mobile health checks

My current health status	Prepare for arrival	My team
For more information, see View your health status in Now Mobile.	My readiness checklist Provides a checklist of tasks to complete prior to arriving at the work location.	My team's health Shows a list of your direct reports and their health status.
	My office entry code Provides a QR code that enables you to check into a work location.	My direct reports open tasks Shows all open tasks assigned to your direct reports that must be completed prior to arriving at a work location.

Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Install Safe Workplace for mobile

Install the Now® Mobile app and Safe Workplace for mobile app.

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Before you begin

The Safe Workplace for mobile app (sn_imt_mobile) is dependent on the com.sn_imt_quarantine plugin.

The Safe Workplace for mobile app also has an optional dependency on other Safe Workplace applications. If you have any of these plugins installed, the corresponding applications will appear in your Safe Workplace for mobile app:

- sn_imt_checkin
- sn_imt_core
- sn_imt_monitoring
- sn_imt_ppe
- sn_imt_tracing
- sn_imt_travel
- sn_imt_health_testing

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Procedure

1. On your mobile device, download the Now Mobile app for Apple iOS or Google Android from the Apple App Store or the Google Play store.
2. In your instance, navigate to **System Applications** > **All Available Applications** > **All**.
3. Search for `Safe Workplace for mobile`.
4. Click **Install**.

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5. In the Application installation dialog box, click **Install**.
6. When the installation is complete, click **Close**.
7. **Optional:** Control access to the application by creating a group and assigning roles to the group or individual users.

   (Optional) For more information, see Roles.

Report your health status in Now Mobile

Use the Now® Mobile app to report your health status.

Before you begin

Role required: sn_imt_quarantine.crisis_task_user

To access this content, you must have the Now Mobile app. Your instance must have the Emergency Self Report application installed.

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

Procedure

1. Open the Now Mobile app.
2. At the top of the Health page, click the quick action icon to open the self-report applet.
3. Select your health status from the list, and tap the check icon ( ) to confirm your status.

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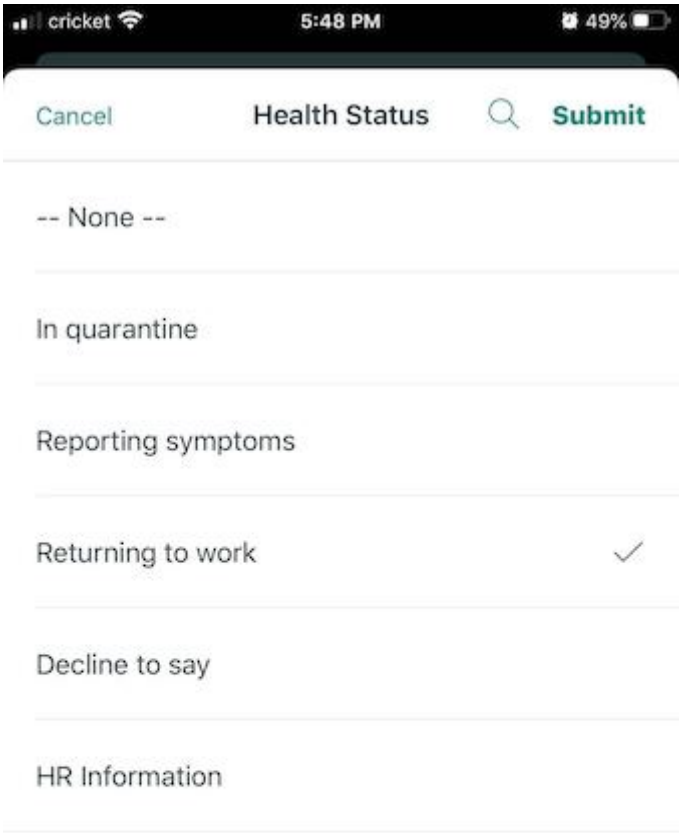

4. Click **Submit**.

View your health status in Now Mobile

Use the Now Mobile app to view your health status record.

Before you begin

Role required: none

To access this content, you must have the Now Mobile app. Your instance must have the Emergency Self Report application installed.

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

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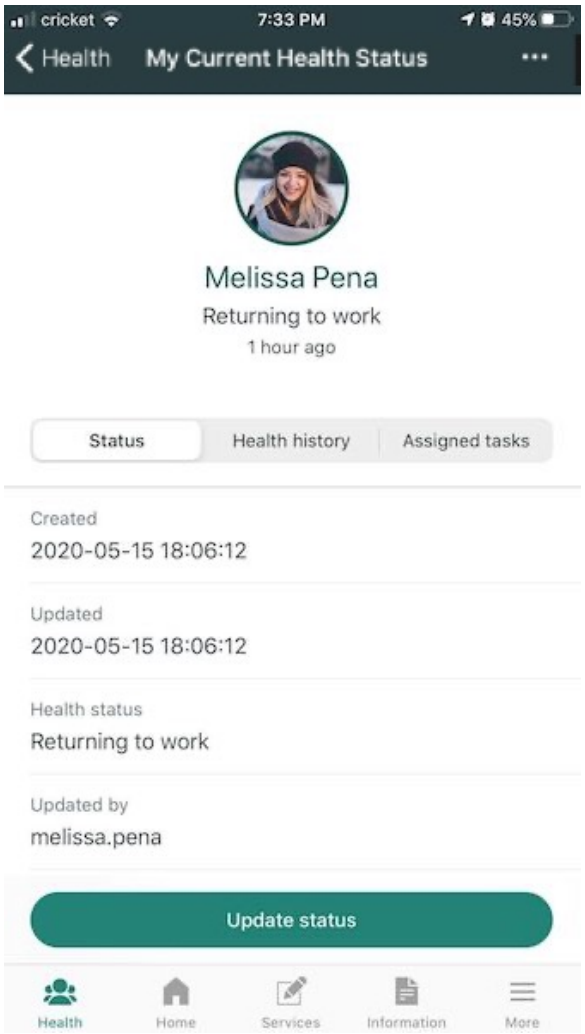
Procedure

1. Open the Now Mobile app.
2. Scroll down to **My Current Health Status** and click the **See All** link.
3. Click your name.

My Current Health Status screen

The **My Current Health Status** screen displays the following information:

- Use the **Status** tab to see your current reported status.
- Use the **Health history** tab to see a history of your health status updates.
- Use the **Assigned tasks** tab to see the tasks assigned to you.
- Use the **Update status** button to change your health status.
- If you're a manager, use the **Reassign all** action from the top menu icon ··· to reassign all your tasks.



Manage the status of your direct reports in Now Mobile

Use the Now Mobile app to view the health status of your direct reports.

Before you begin

To access this content, you must have the Now Mobile app. Your instance must have the Emergency Self Report application installed.

Role required: none

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

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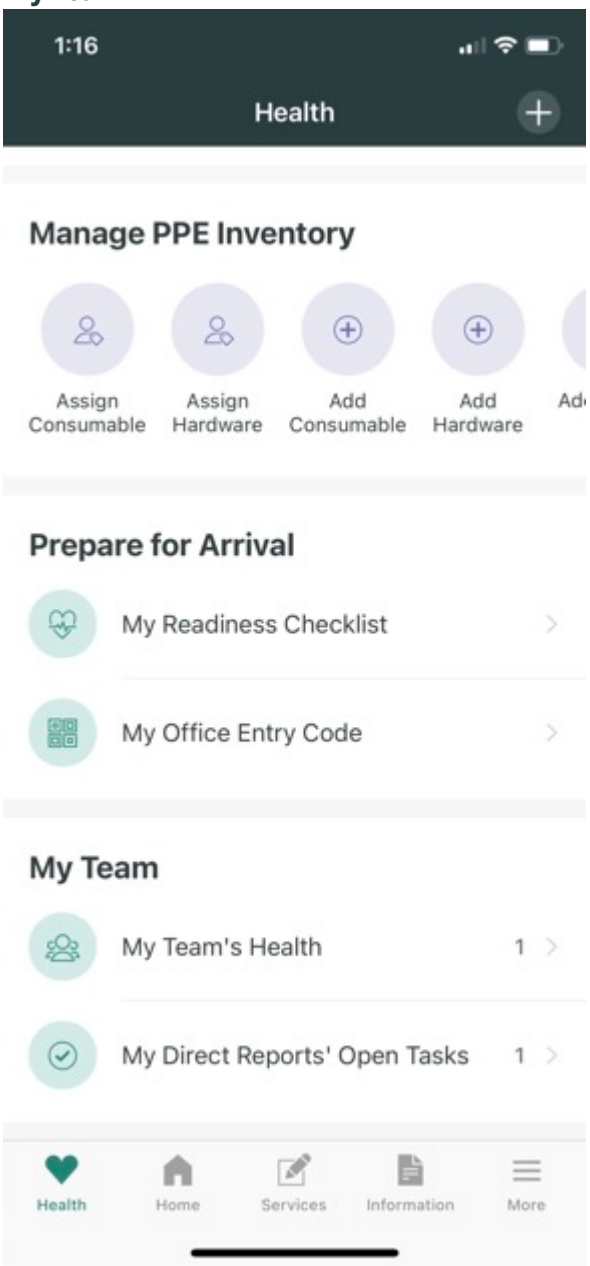
Procedure

1. Open the Now Mobile app.
2. Scroll down to the My Team section and click the **My Team's Health** link.
   In the My Team's Health section, you can see a list of all your users.

My Team



3. In the My Team's Health section, a list of all your users and their status is displayed.

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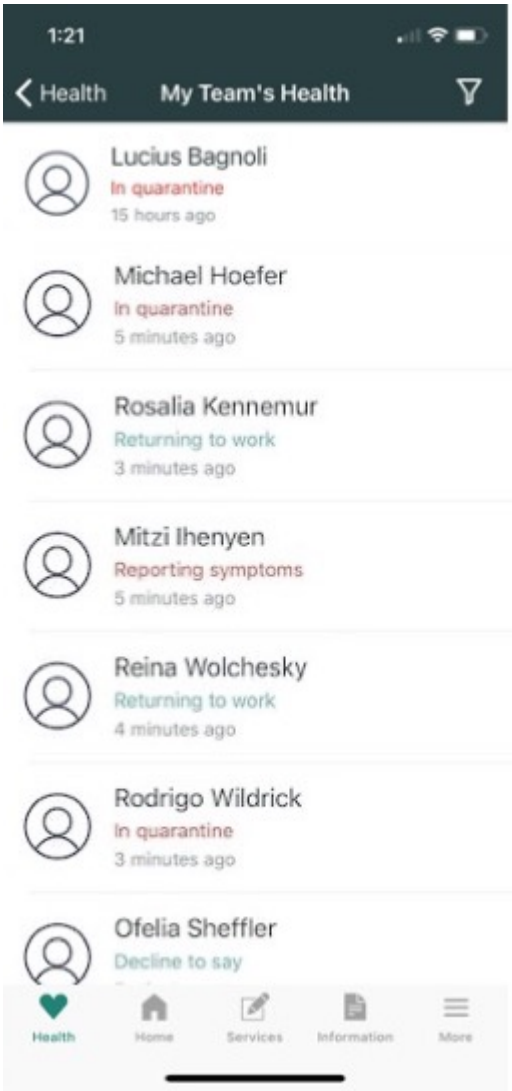
List of users and their status



4. **Optional:** Update the status for a user.
   - Swipe to the left on an entry in the list to update the user's status.
   - Tap on a record in the list and click **Update status** at the bottom of the task form.

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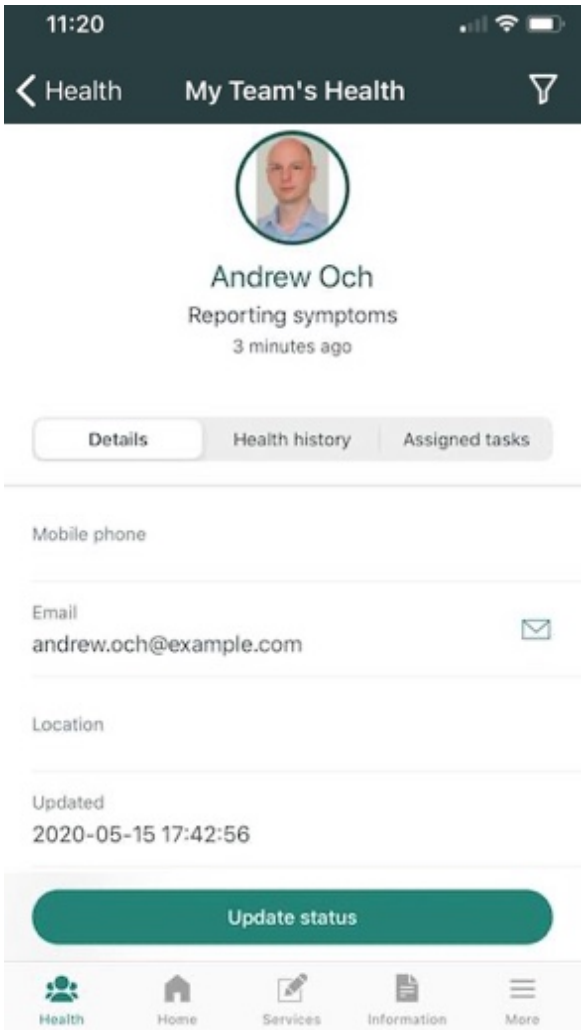
5. Tap an entry on the list to view the employee record screen.

Employee record screen

The employee record screen displays the following information:

- Use the contact and location information in the Details screen to keep in touch with your direct hires.
- Use the **Health history** tab to see a history of the user's health status updates.
- Use the **Assigned Tasks** tab to see the tasks assigned to the user.
- Click the **Update status** button to change the user's health status.



Reassign tasks to your team members in Now Mobile

As a manager, view a list of tasks assigned to your team members and reassign the tasks to other team members.

Before you begin

To access this content, you must have the Now® Mobile app. Your instance must have the Emergency Self Report application installed.

Role required: none

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

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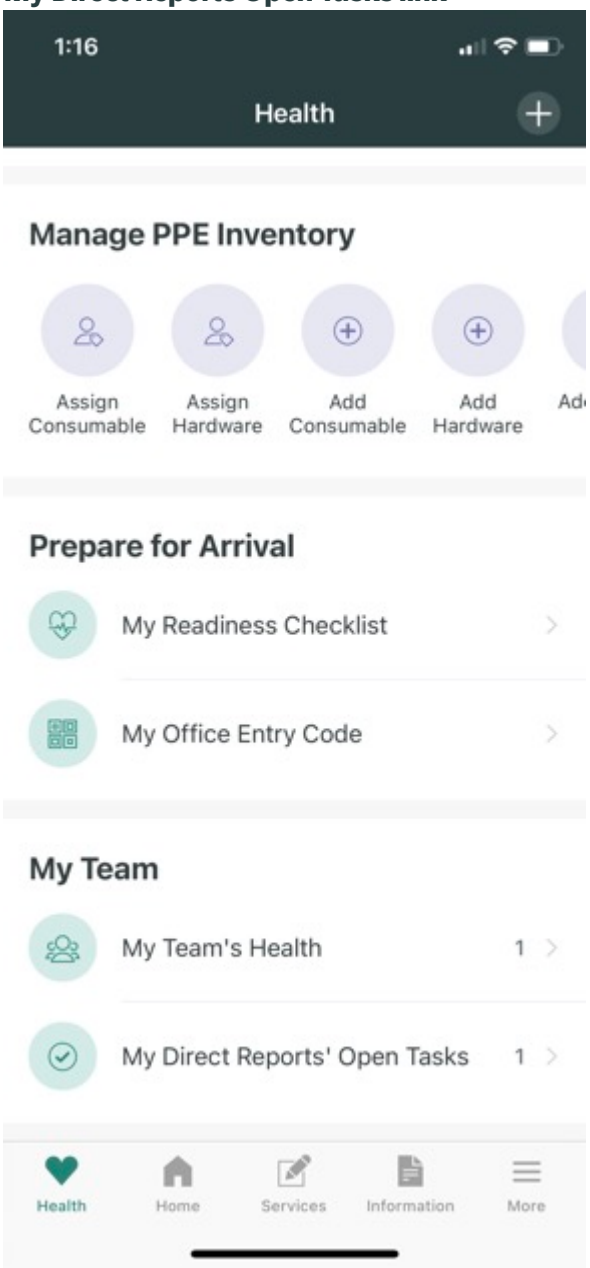
Procedure

1. Open the Now Mobile app.
2. Scroll down to the My Team section and click **My Direct Reports Open Tasks**.

My Direct Reports Open Tasks link



A list all open tasks assigned to your direct reports is displayed.

3. To view details about the task, click the open task.
4. To reassign a task, swipe left and click **Reassign**.
5. Search for a user that you want to reassign the task to and select the name of the user.
6. Click **Submit**.

Domain separation and Safe Workplace suite

The Safe Workplace suite applications support domain separation at the Basic level with the exception of Safe Workplace Dashboard.

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With domain separation, you can separate data, processes, and administrative tasks into logical groupings called domains. You can then control aspects in each domain, including what users can see or whether they can access the data.

Domain separation support

ServiceNow applications that support domain separation might support the separation of data and data routing only, have advanced business logic separation, or support customer-level administration of the application. ServiceNow applications are defined with incremental support levels from the perspective of actual use cases and the people who use them.

- **Basic**
  - Data is domain-separated.
  - Logic exists to ensure proper data routing, caching, rollups, and aggregations.
  - Global configuration is operational for multiple tenants
- **Standard**
  - Application properties are domain-aware as needed.
  - Business logic can be domain-separated by the instance owner per tenant.
- **Enhanced**: Data-driven process enables failsafe configuration by tenants through the UI to drive business logic.

For more detail on the support levels, see Application support for domain separation.

How domain separation works in Safe Workplace applications

The following applications use the Safe Workplace domain table:

- Contact Tracing
- Health and Safety Testing
- Emergency Outreach (Daily Contact Logs, Privacy Consent, and Privacy Consent (common))
- Emergency Exposure Management

Admins must install the Domain separation plugin before working with these application tables. Most of those tables contain a **sys_domain** field so they are able to be domain-separated if they have data that needs to be partitioned by domain.

- Core domain table: Included in the Safe Workplace plugin is an sn_imt_core_domain table. Domains in this table are iterated when scheduled jobs run.
- Property table: The sn_imt_core_property table extends the sys_properties table and adds a sys_domain field. Adding that field allows sys_properties values to be overridden for a domain.

Note: Values are handled differently for `password2` fields than for other property types. Therefore, the value displays as blank in the domain-separated properties list view.

The following tables do not have the sys_domain field:

- app-imt-checkin
  - sn_imt_checkin_outreach_sysauto_script (extends sysauto_script)
  - sn_imt_checkin_response_criteria
  - sn_imt_checkin_response_option_for_health

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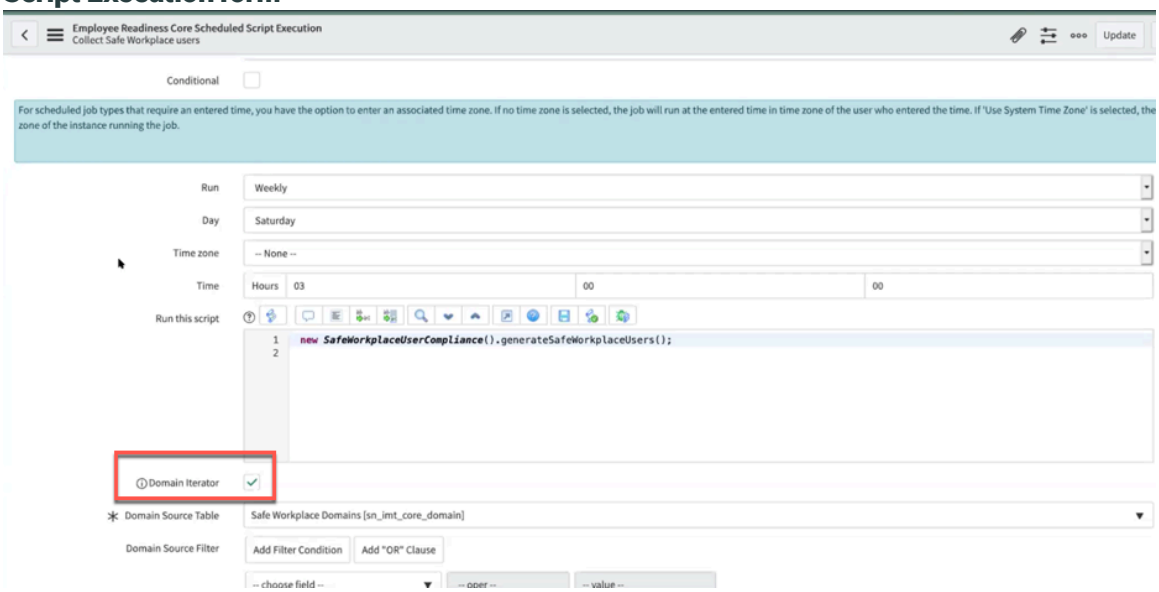
  - sn_imt_checkin_response_option_survey
  - sn_imt_checkin_response_script
- app-imt-diagnosis: task_compliance_result

- app-imt-tracing
  - sn_imt_tracing_wifi_access_register_job
  - sn_imt_tracing_wifi_access_register_stage
- app-imt-core: sn_imt_core_sysauto_script (extends sysauto_script)

Scheduled jobs in applications with this level of domain separation run separately for each domain in the table. Scheduled jobs use the core table as the domain source table, and the **Domain Iterator** check box is automatically enabled by default when domain separation is installed. When the **Domain Iterator** option is enabled, the job can run in multiple domains.

The **Domain Source Table** value is also set to Safe Workplace Domains by default. If you don't see the tables, verify that the **Domain Iterator** and Safe Workplace Domains settings are selected, and refresh the instance.

Domain iterator option selected in the Employee Readiness Core Scheduled Script Execution form



Parent-child domains

Domains that also contain a sub-domain or “child” domain are not supported in these applications. Running a job in a parent domain that has a child would mean running the job twice and thus processing the data more than once. You could add a parent domain or add just the child domain but not both.

Working with domain-separated properties in the Safe Workplace Suite

When the Domain separation plugin is installed and you navigate to the Properties page in any of the four Safe Workplace domain-separated applications, their properties do not display by default. You must override properties for a domain before they appear in the list.

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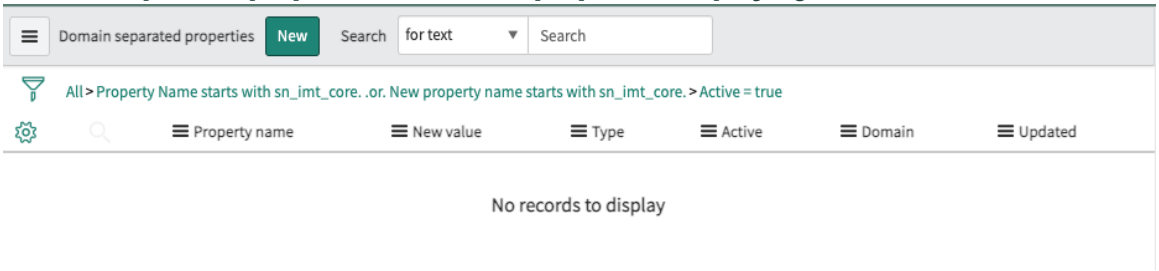
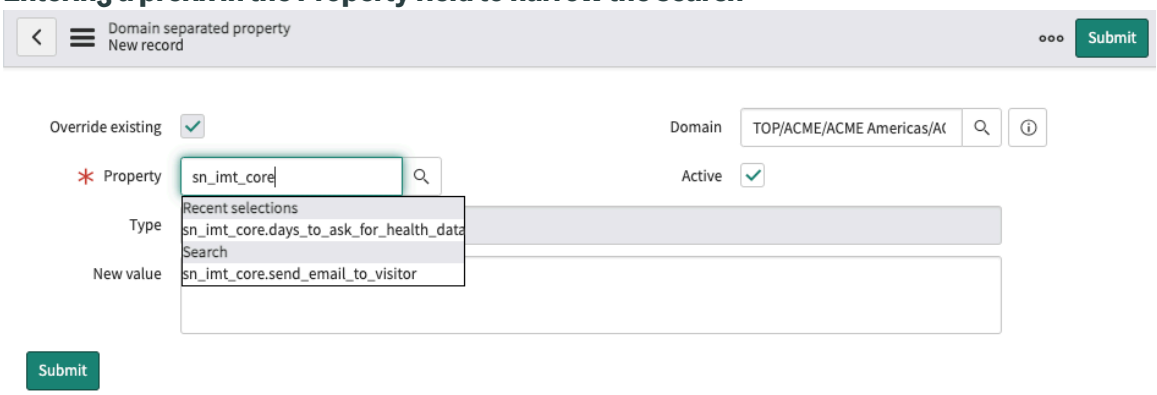
Domain-separated properties list with no properties displaying



To display the properties, click **New** on the Properties page. In the form that creates a new domain-separated property, search in the reference field for the property you would like to override. Enter a specific prefix to narrow your search:

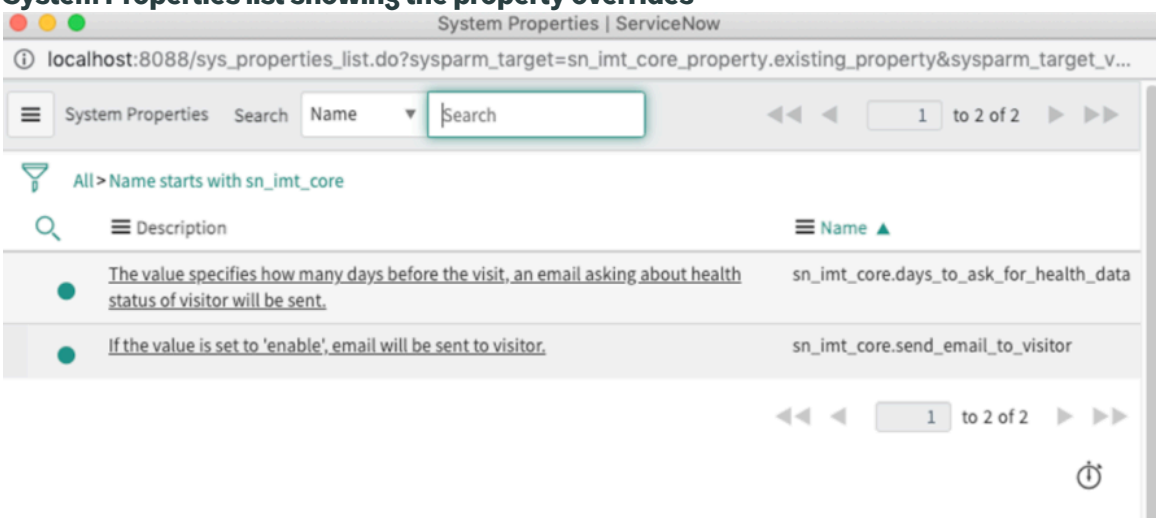
- `sn_imt_core` for Employee Readiness Core
- `sn_imt_diagnosis` for Emergency Exposure Management
- `sn_imt_health_testing` for Health and Safety Testing
- `sn_imt_tracing` for Contact Tracing

Entering a prefix in the Property field to narrow the search



The properties display with a full description of the overrides.

System Properties list showing the property overrides



After you create your domain-separated property override, the form displays the domain-separated properties.

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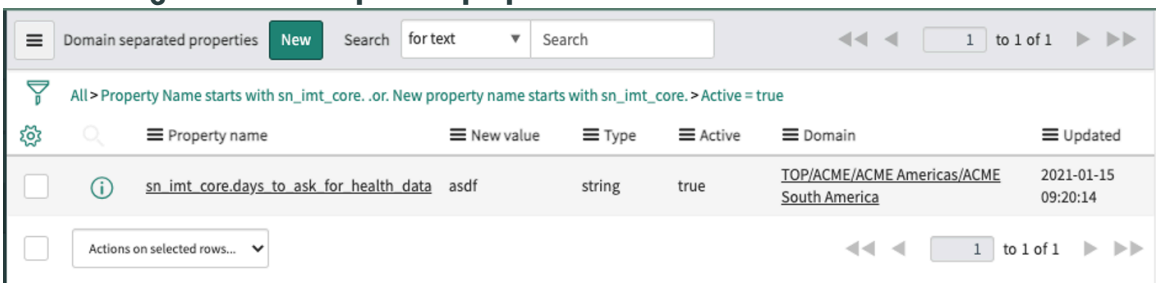
List showing the domain-separated properties



You can navigate back to the record form by selecting a property name in the list.

Property functions

Learn more about how these properties function in the following topics:

- Health and Safety Testing properties
- Contact Tracing properties
- System properties for tracing systems in Emergency Exposure Management
- Employee Health and Safety Status properties

Related topics

Domain separation for service providers

Workplace Service Delivery

Provide employees with a single place to manage workplace tasks like reserving rooms, ordering supplies, reporting maintenance issues, or requesting cleaning with the ServiceNow® Workplace Service Delivery. Reduce the back-end complexity of setting up and maintaining a streamlined experience for your workplace.

Workplace Service Delivery (WSD) provides digitized workplace experiences to employees for managing their workplace activities. It provides flexible modern workplace solutions to drive employee productivity and workplace decisions.

https://player.vimeo.com/video/1154437552?h=b3302191f2&badge=0&autopause=0&player_id=0&app_id=58479

Enhanced Employee Experience with digitized workplace services

WSD provides digital entities and automation tools to enhance and streamline work processes for employees. Employees can digitize their hybrid workplace days, collaborate, and gain access to physical workspaces in their organization. Employees can manage their reservations, reserve their favorite or preferred desks, meeting rooms and parking spaces. Employees can manage workspaces tailored to their privacy and location preferences. Administrators and facility managers can get detailed insights on employee engagement and real-estate usage to manage capacity planning. Workplace digitization helps create a more connected work environment by transforming how teams interact, share information, and collaborate across platforms and businesses.

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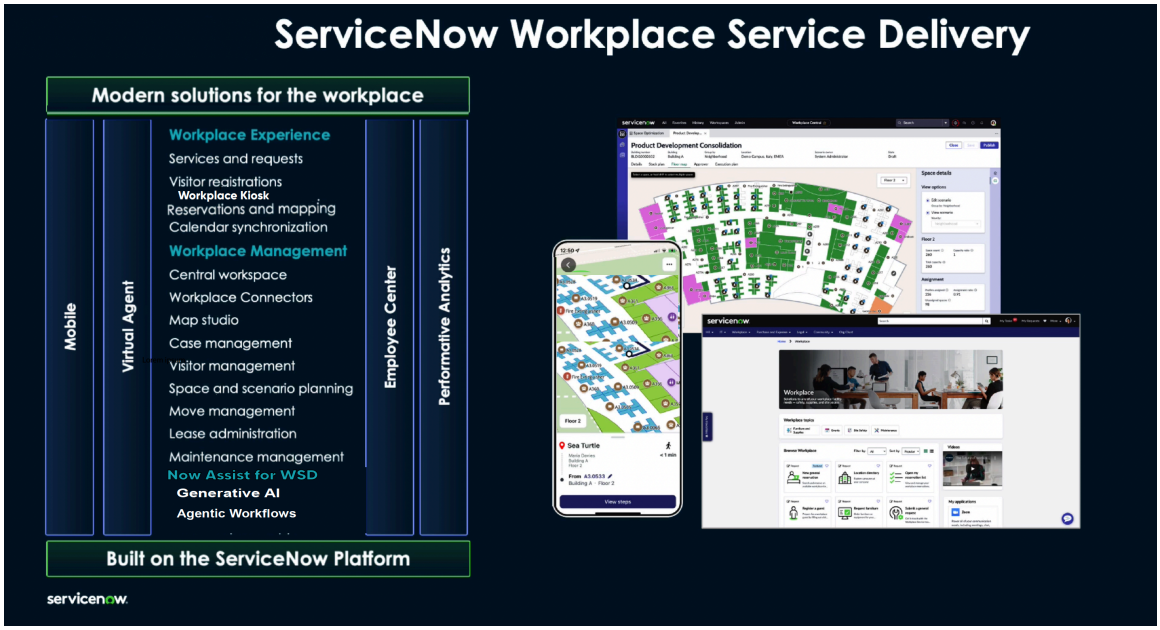
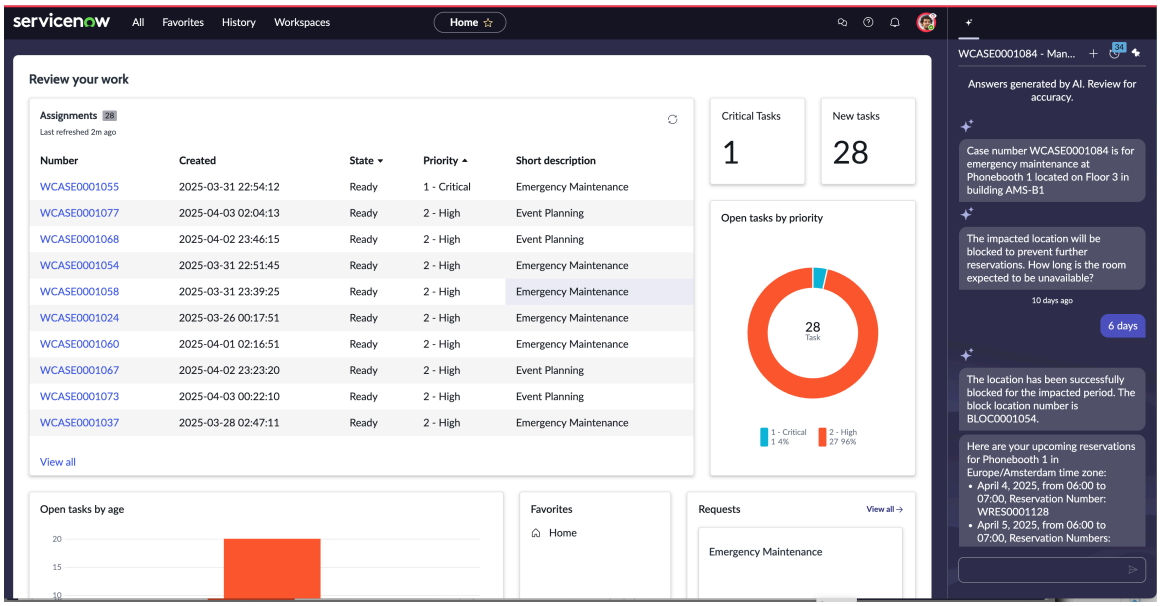


Intelligent routing of workplace requests with Now Assist for WSD

With WSD you can optimize workplace operations with smart building integrations. Workplace Service Delivery AI agents can assist and act autonomously to resolve issues and make decisions. AI agents can autonomously block a meeting room in case of an emergency maintenance request and move your existing meetings from the blocked location to a new one by interacting with your environment. AI agents use Out-of-the-box ServiceNow AI Platform® capabilities. Enhance employee self-service requests with Generative AI for improving workplace productivity, enhanced employee experience, and reduced case deflections.



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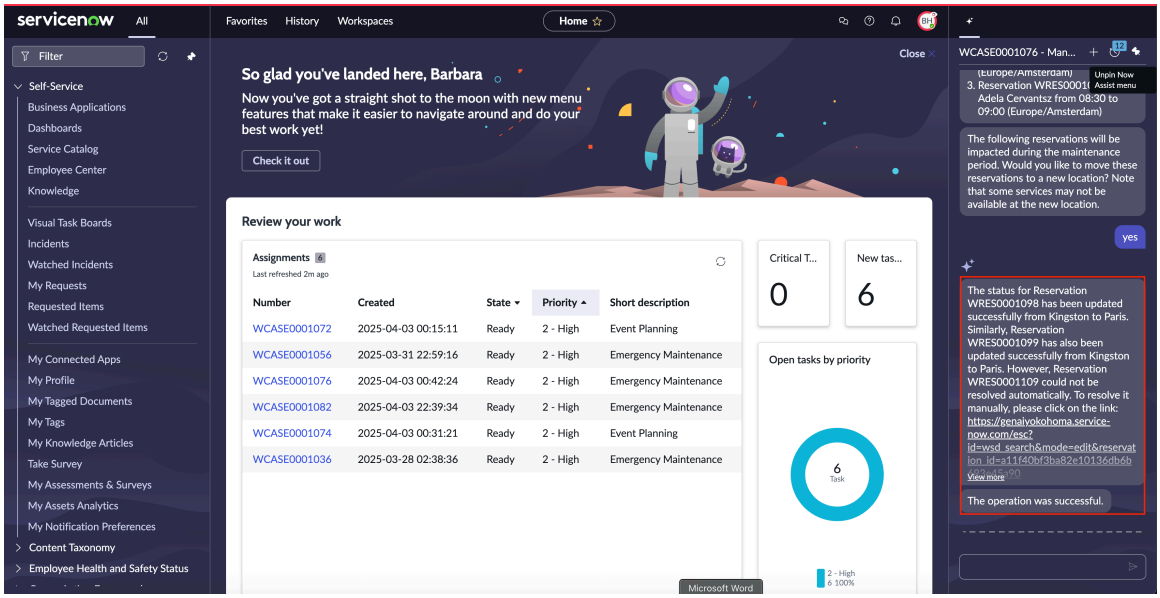
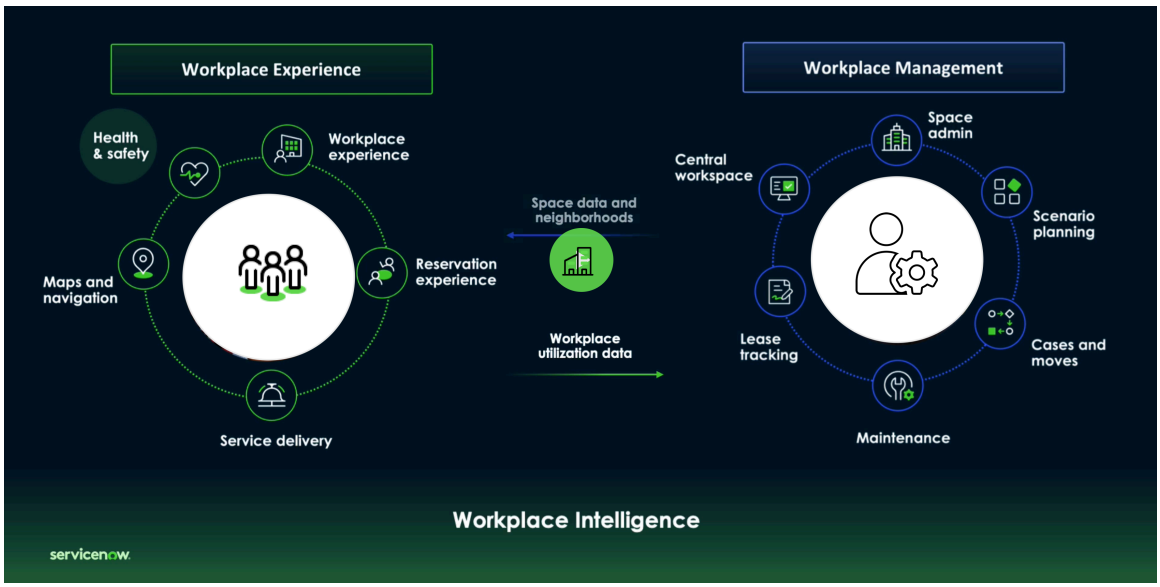


Automated workflows

Workflow automation in WSD provides both digital workspace apps and physical workplace resources to redesign workplace facilities. Workplace procedures and tasks are automated for employees to increase workplace productivity and collaborate effectively with preferred collaborators in their in-office presence days.



Optimize space management with space utilization insights

WSD provides a single platform and solution to efficiently manage your organization's real-estate portfolio. Workplace services team can maintain facilities more efficiently using a single workspace. Plan and manage your maintenance, leases, and mappings using Workplace Central and Workplace Lease Administration.

Using the dashboard and analytics capabilities of Workplace Central, workplace managers can allocate workspaces to employees based on their preferences and requirements while simultaneously keeping a tab on space utilization. Facility managers can view space capacity using stack plans and measure the frequency of workspace utilization.

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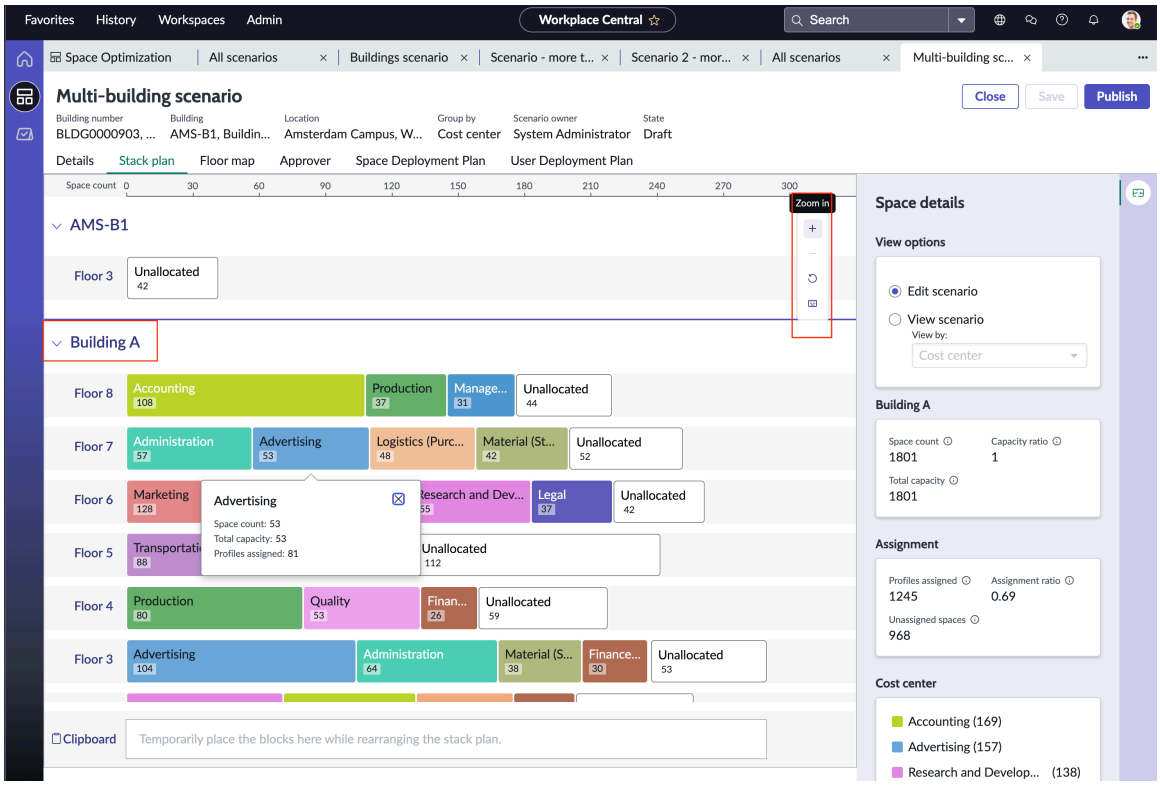
Workplace Service Delivery data model helps facility managers to optimize real-estate decisions and remove redundant spaces that are no longer in use. Occupancy sensors provide real-time utilization data, guiding employees to available spaces. Workplace administrators and managers can design and build custom reservation services. Workplace portfolio managers can access insights on individual space type utilization. It helps you align your real-estate decisions with your organizational goals to setup a modern workplace. Workplace Service Delivery provides a single platform to help you optimize your existing and future real-estate investments. Monitor, view, and optimize workplaces and space allocation in real-time to make real-estate decisions.



Lease Administration

Track workplace lease contracts, assets, services, and locations that are part of a contract using Workplace Lease Administration. Workplace managers can use Workplace Lease Administration to create and track workplace contracts. Workplace Managers are notified about expiring contracts, and track services that are part of a contract. Teams can also track locations that are part of a contract and maintain a list of assets in a contract, and manage contract documents.

Mobile workplace reservations

Enhance and increase workplace efficiency by using the Workplace Service Delivery for Mobile app. It enables employees, workplace managers and agents to access reservation, employee presence, and work schedule capabilities while on the move from any location any time.

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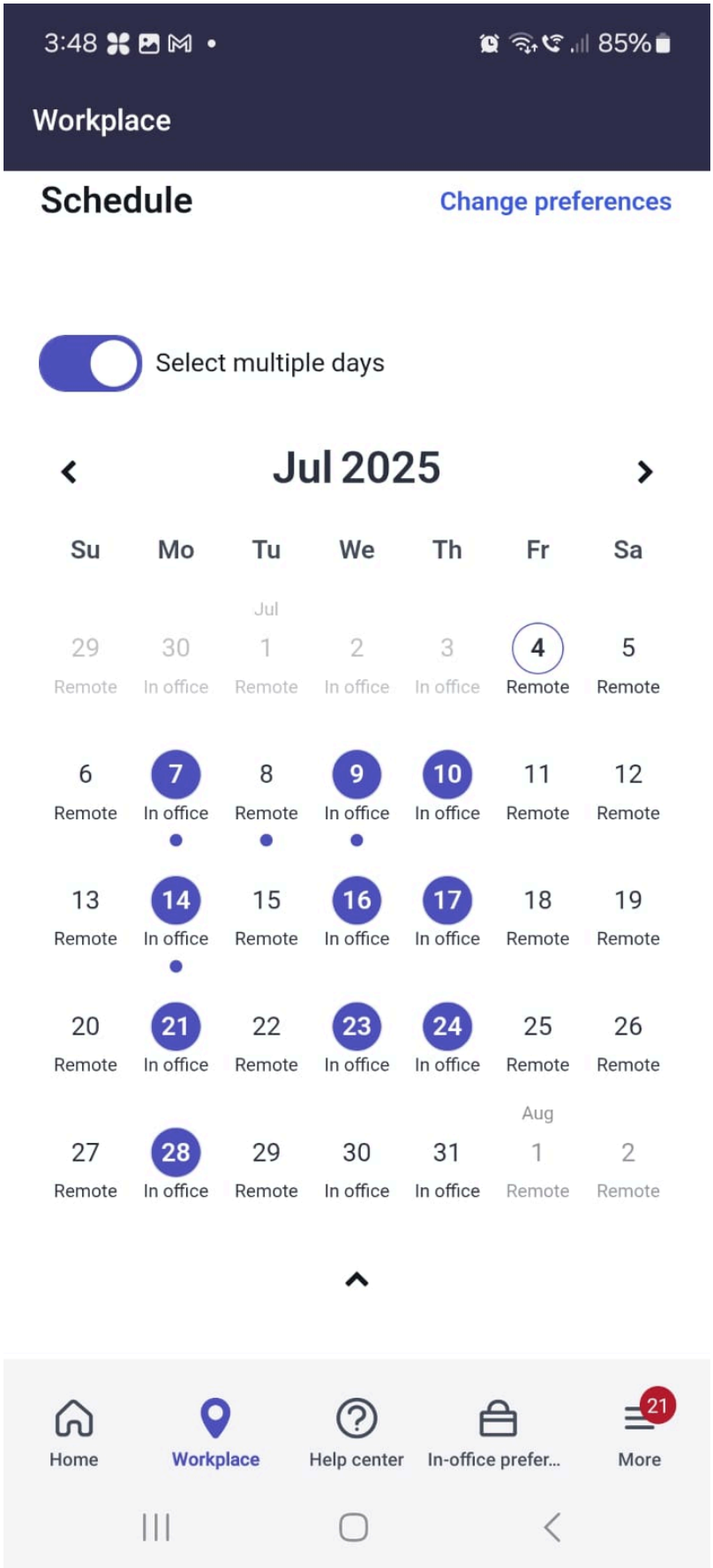

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Get started

- Work with an implementation specialist to achieve your desired business outcomes. To learn more, visit the Customer Success Center.
- Review the product documentation, beginning with Workplace Service Delivery Applications.
- Get certified and take a course on Workplace Service Delivery to manage and deliver workplace capabilities and services to your users. To sign up, visit ServiceNow training and certification.
- Visit the WSD Community Forum. To learn more, visit the Workplace Service Delivery Community.
- Visit the Product Hubs. To learn more, visit the Employee Center Product hub.

Workplace Service Delivery applications

ServiceNow® Workplace Service Delivery provides a suite of applications for improved employee experience and productivity. Download the ServiceNow® Workplace Service Delivery Suite, ServiceNow® Workplace Service Delivery Professional, or ServiceNow® Workplace Service Delivery Enterprise to automatically install all the Workplace Service Delivery applications at once.

Applications installed with Workplace Service Delivery

Workplace Core

Workplace Core serves as the foundation for managing workplace data and operations. Organizations can define key workplace elements such as campus, buildings, floors, and space types to support maintenance activities, employee and visitor reservations, and workplace requests. It enables coordination and efficiency across workplace processes.

With the Workplace Core (sn_wsd_core) application, workplace managers can efficiently manage workspace allocation for employees and monitor preventive maintenance activities across the organization.

- Space Administration: Manage workplaces by defining locations within a location hierarchy, such as spaces, areas, floors, buildings, campuses, sites, and regions. Workplace managers can efficiently plan and implement workplace strategy for better space utilization and optimization.
- Location Directory: Employees can view and search for spaces to make reservation or search for team members within the workplace.
- Shift Management: Workplace Managers can create shifts and schedule them for specific times and days. Start planning for workplace occupancy levels by allocating employees and available spaces to specific shifts.
- Dashboard: Analyze the availability of spaces and occupancy levels of office locations through data visualization.

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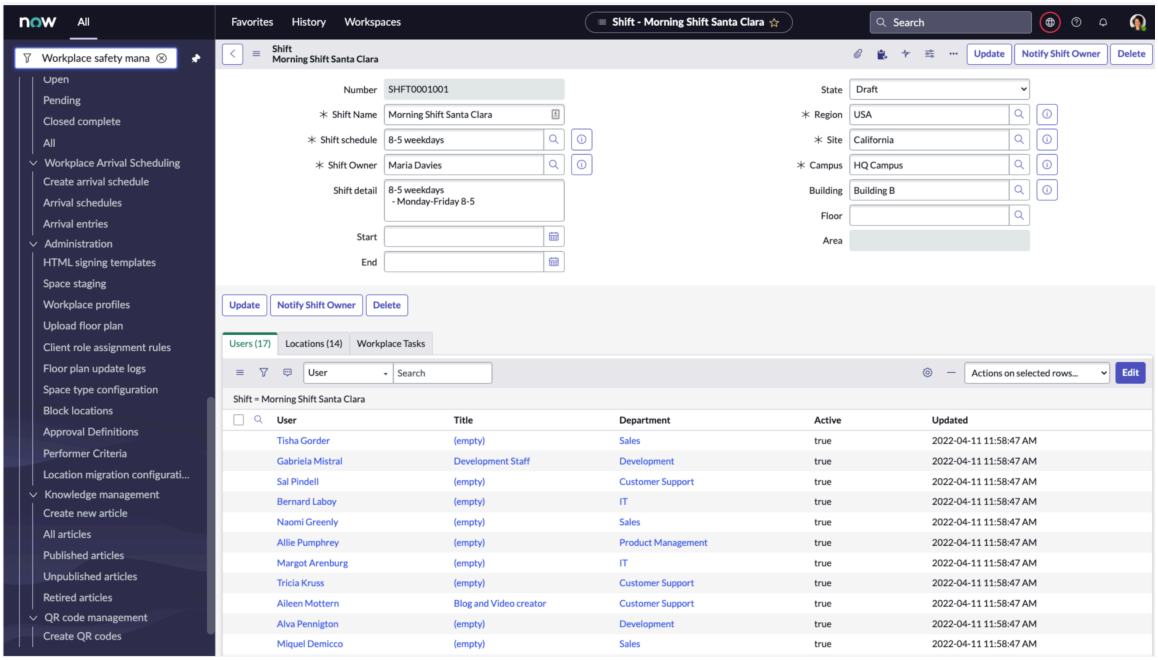

Workplace Reservation Management

Workplace Reservation Management application makes it easier for employees to reserve meeting rooms, conference rooms, desks, and workplace services from the reservation portal or the mobile application. Employees can efficiently search and reserve locations based on privacy and location preferences. Employees can make a single-day, recurring, multi-day, multi-building reservations. They can edit or update their reservations as and when require.

Workplace Reservation Management enables employees to search, reserve, modify, and check-in reservations for any workspace from an omnichannel self-service interface. Employees can reserve a desk, conference room, equipment, or a parking space based on availability. Employees can add invitees, workplaces services, or amenities to their reservation request. The application provides quick reservations by enabling employees to set up recurring events, create single or multi-day reservations, or even schedule multi-location reservations and request room configurations.

- Reserve any workspace including desks, conference rooms, collaboration spaces, or parking spaces from any device.
- Quickly view physical spaces on a floor map using Indoor Mapping to identify reserved, available, and non-available spaces.
- Easily add invitees, external visitors, or guests to your reservation, assign them to a space. Notify them and track their acceptance status.
- Easily create a hybrid meetings and share it with meeting attendees.
- Add workplaces services or raise requests for managing events, conferences,#trainings, and customer visits.
- Workplace managers can import space administration tables, define reservable and non-reservable spaces, and track reservations.
- Control employee location visibility when an employee is searching for a workspace.
- Facility managers can create open, restricted, and non-restricted neighborhoods and assign to employees. Enable employees to reserve spaces in eligible neighborhoods. Employees can search, browse, or navigate neighborhoods using the Location directory.

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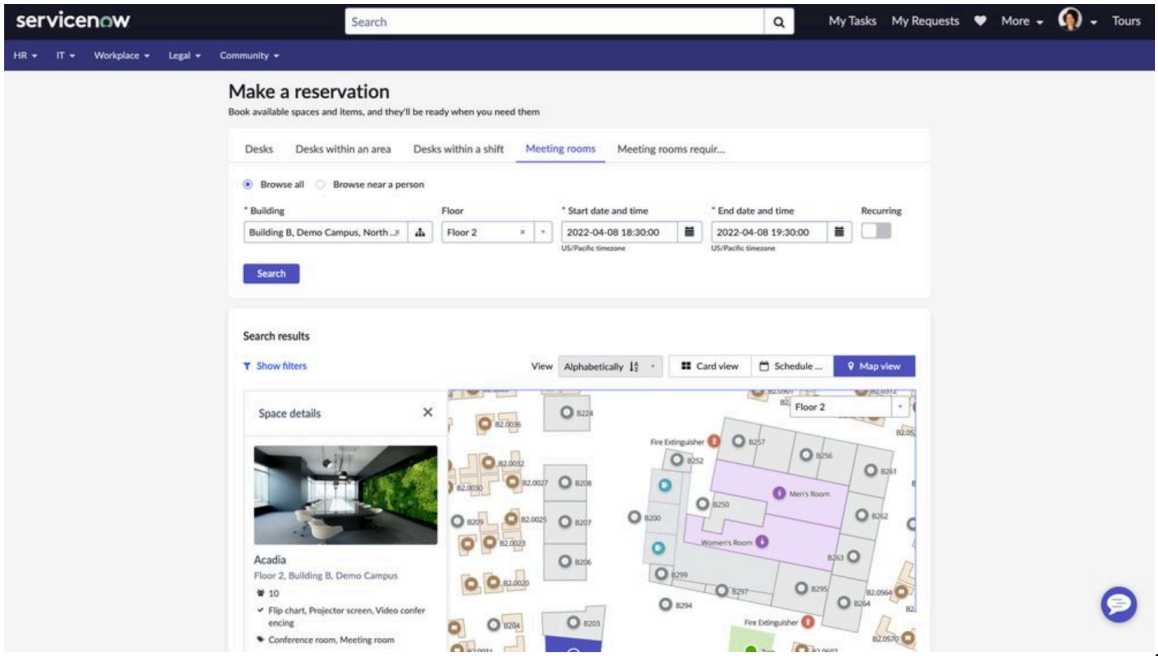

Now Assist for Workplace service Delivery

Now Assist for Workplace Service Delivery (WSD) elevates your Workplace Services experience with generative AI capabilities. Transform the employee experience by enabling interaction with physical workspaces through generative AI technology.

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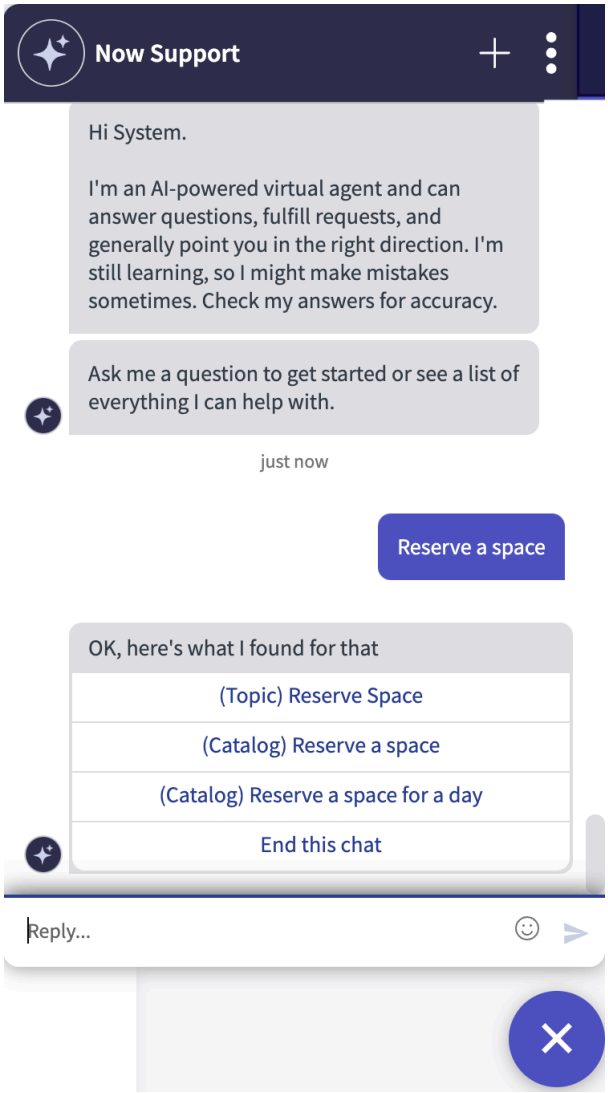
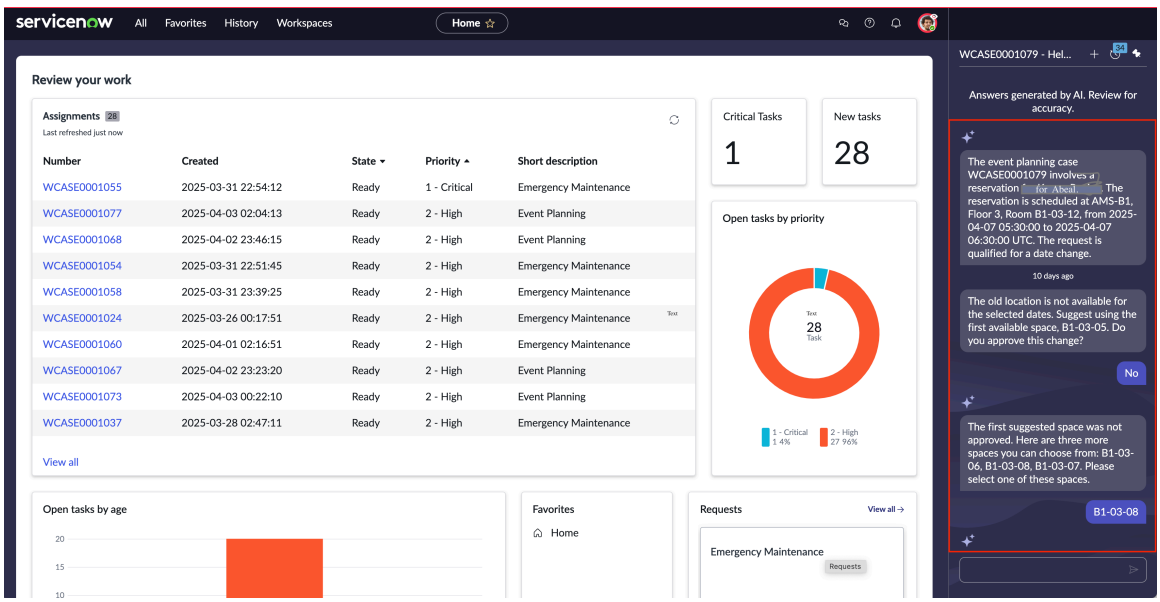


- Request spaces effortlessly with an intuitive, streamlined experience
- Add services and guests to a new reservation



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Agentic AI in Workplace Service Delivery (WSD) enables autonomous management of tasks like temporary space closures, optimizing workflows, and reducing manual effort. in case of emergency maintenance requests, AI agents autonomously block an affected space, move existing reservations to a new location. AI agents send notifications to Workplace Event Planners using the Now Assist Conversational Interface. Workplace Event Planners can engage with AI agents to suggest another space using Conversational Q&A.

Workplace Concierge

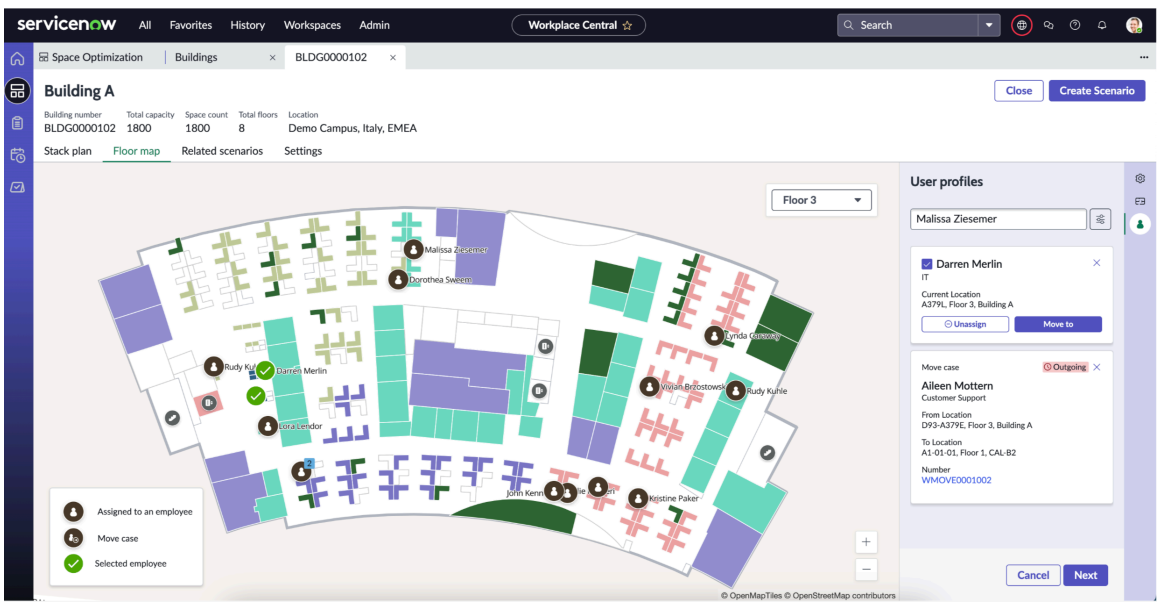
The Workplace Concierge application is a Workplace Service Delivery application designed as a one-stop application to help employees with their workplace experience. They can set their in-office days and more.

Workplace Concierge provides employees with real-time insights to optimize their on-site presence in the workplace with their co-workers, improving team collaboration and learning. Using personalized suggestions, employees are guided to the best workspace when they plan to visit their home office or travel to another office.

- Indicate in-office work days for collaborator's visibility
- Add collaborators and view their planned in-office days
- Optimize in-office days using a personalized dashboard supported with insights
- Get personalized suggestions when searching for an available workplace for today or a specific date

Workplace Central

Workplace Central provides a unified experience for workplace managers and other key personas such as space planners, move managers, and maintenance planners. They can strategize, plan, and maintain real-estate requirements more efficiently.



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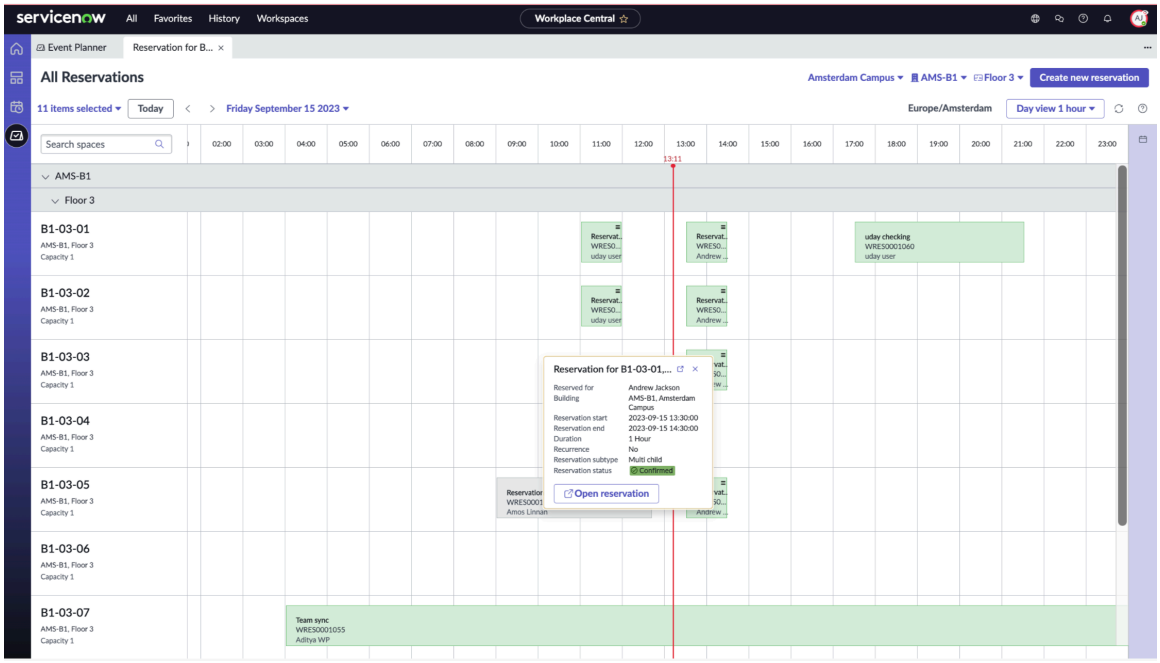

Space optimization:

- Create open and restricted neighborhoods and assign employees to them and manage space assignments through a floor map.
- Build multiple space scenarios and visualize them based on their assignments, cost centers, or departments to optimize spaces.
- Adjust space scenarios by drag and dropping items on the plan to glean overall utilization and unallocated space.
- Easily identify unassigned and flexible spaces using the floor map view. Assign users directly, change a space's assignment type, and view space details by directly selecting the space on the floor.

Lease Administration:

- Create and track workplace contracts
- Get notified about expiring contracts
- Track services provided as part of the contract
- Track locations that are part of the contract
- Maintain a list of assets that are part of the contract
- Manage contract documents

Preventive maintenance:

- Create preventive maintenance plans for enterprise assets and workplace locations. The latter can be used to do maintenance planning for soft services like house-keeping.
- View preventive maintenance cases, as an outcome of preventive maintenance planning, in the overview tab. The overview tab is a focus area for maintenance planners and maximizes the information in one Viewport.
- Assess preventive and corrective maintenance cases for the current month in the personalized landing page for maintenance planners.

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Move Management:

- Track move cases and associated tasks seamlessly with the move management module.
- Use the Move Scheduler, a visual move planning tool, to group move cases into projects and create an organized and logical plan for bulk moves.

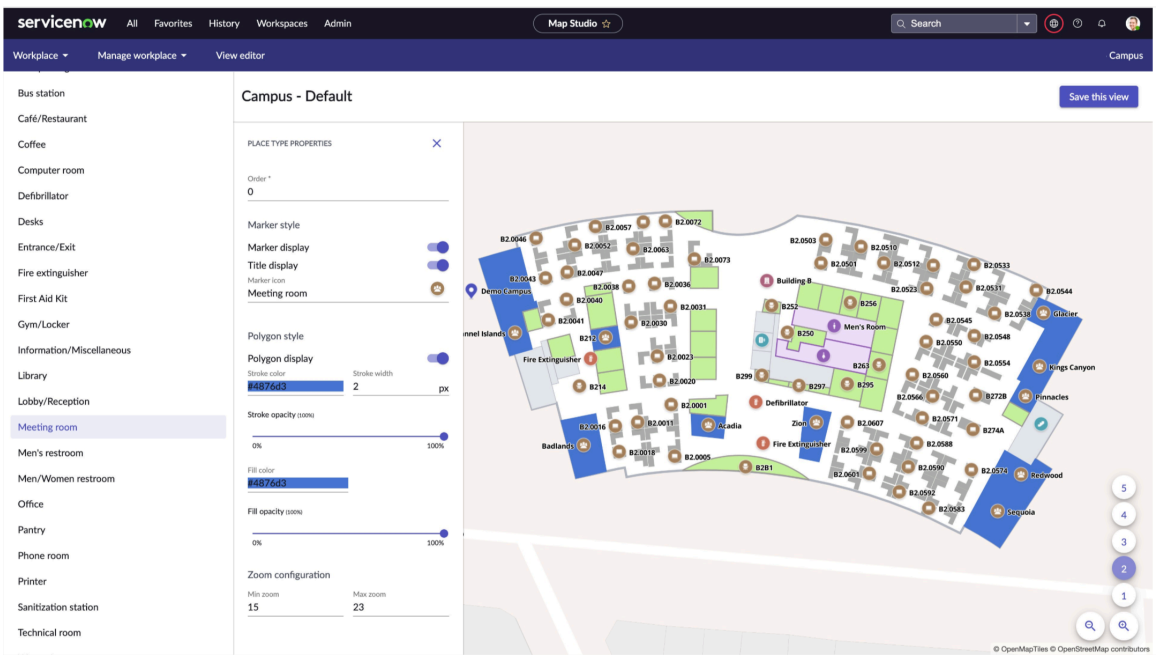
Reservation Management:

- Equip planners and space managers with information on how spaces are being used.
- Optimize space reservations by manually changing the start date and time, or location.
- Manage reservations quickly and easily on behalf of employees.

Indoor Mapping

Indoor Mapping provides indoor visualization and navigation capabilities as part of Workplace Service Delivery application.

Employees can visualize and get directions to and from points of interest. They can visualize workplace interiors, room reservation states, along with other indoor and outdoor details for a selected campus, building, and floor. From the Indoor Mapping Map Studio, workplace administrators can design, edit, and manage inbuilt indoor maps for interactive locations and wayfinding.



- Provides indoor navigation and mapping capabilities in Workplace Service Delivery
- Employees can report a workspace issue using the floor map and notify the facilities team for fulfillment.
- Provides indoor mapping experiences for employees and visitors within a workplace along with interactive directions and wayfinding
- Employees can browse, search, and navigate around workplaces to discover available services, reservable spaces, and amenities.
- Enable workplace managers to edit floor plans in real-time for seamless navigation of workspaces.

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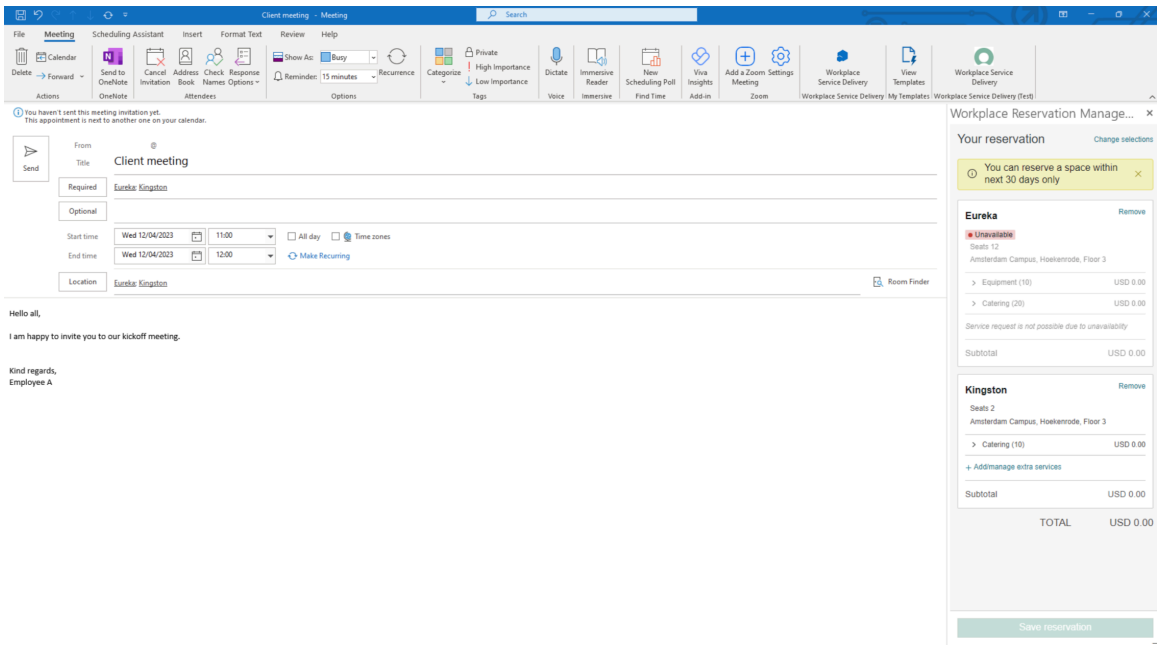
- Switch between locations, floors, or workspaces to view or create reservations across Workplace Reservation Management and Workplace Indoor Mapping.
- Provide an intuitive kiosk experience to search and navigate spaces, view space details, booking options, and occupancy data

Workplace Reservations for Microsoft Outlook Add-in

Workplace Reservations for Microsoft Outlook Add-in provides the capabilities of Workplace Reservation Management within the Microsoft Outlook application. While creating a new event, updating an existing event, or an appointment, an employee can find available spaces easily. Employees can add requests or services such as room configurations or catering without using a separate application.

All reservations and requested services managed within the Workplace Reservation Management application are included with the Workplace Service Delivery solution.



- Find available spaces by applying various search criteria and filters.
- Add spaces directly to an event or allow the add-in to add the spaces.
- Request extra services along with your reservation. This is based on the available extra services menu card defined by workplace teams for each location or space (catering, room configurations, and so on.).
- Update existing reservations, add or change services, and select a different location.
- Provide location privacy preferences to employees while reserving a space.

Workplace Calendar Synchronization

Enhance your workplace's reservation experience by synchronizing your reservations with your calendar provider by using the ServiceNow® Workplace Calendar Synchronization application.

Workplace Case Management

ServiceNow® Workplace Case Management enables workplace services and facilities teams to manage interactions with employees, without relying on any generic tools like email, phone calls and walkups. Standardize the process, interaction and fulfillment of inquires, requests, and

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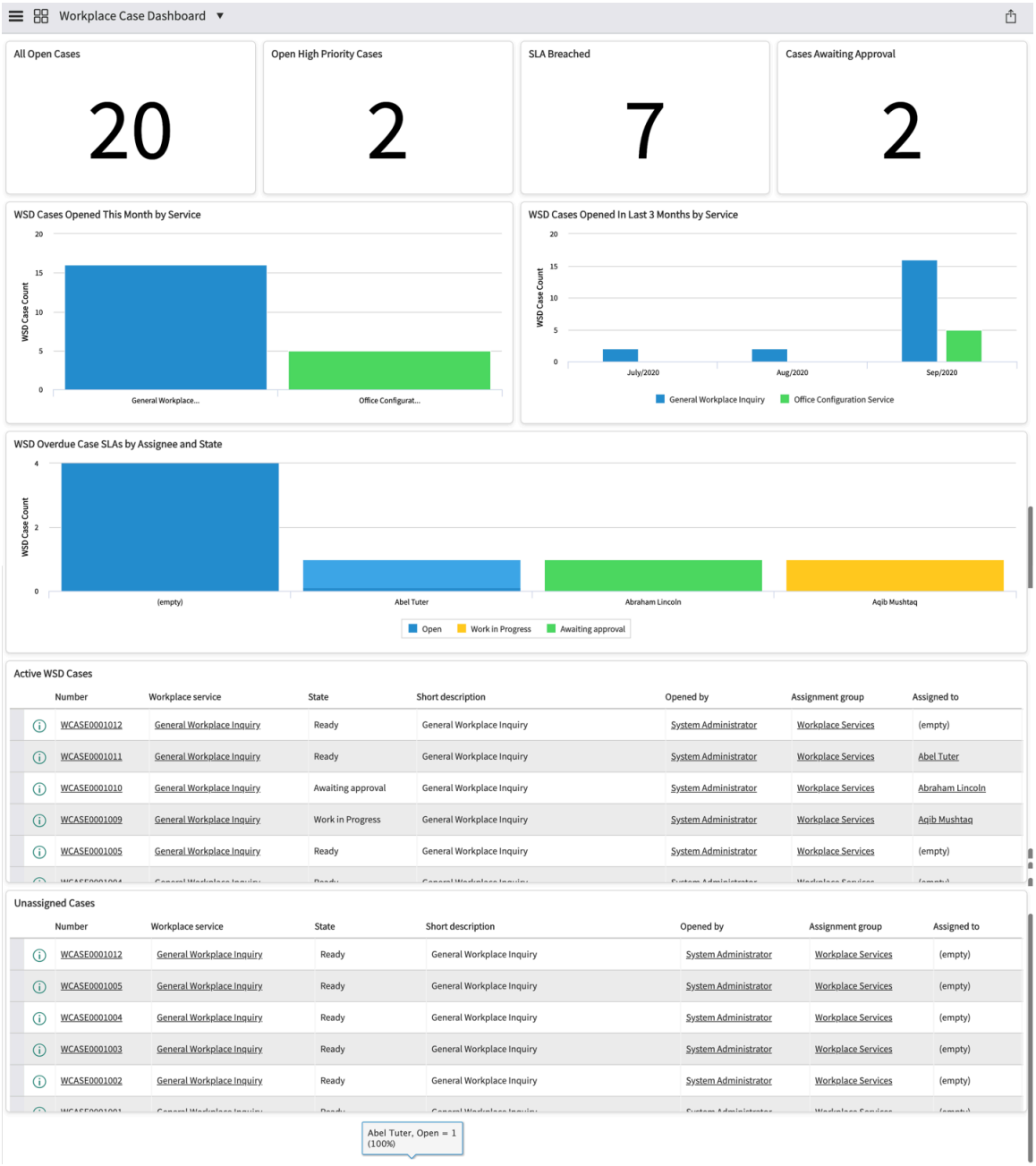
case transfers across the enterprise. Gain clear visibility into the quantity and types of cases workplace teams are receiving for continuous service improvement.



- Enable workplace teams to#provide timely help to#employees.
- Configure approvals for quick fulfillment of cases raised by employees.
- Enable workplace teams to route requests to the right team members, contractors#, or vendors.
- Enable employees to report any workplace issue using the interactive floor maps.

  Use floor maps to facilitate inquiry requests. Users can locate precisely where a case is raised, whether in a specific meeting room, or a printer located in a hallway.

Workplace Move Management

Workplace Move Management Workplace Move Management enables employees to collaborate, communicate, and easily manage one-off seat changes from start to finish. Both employees and

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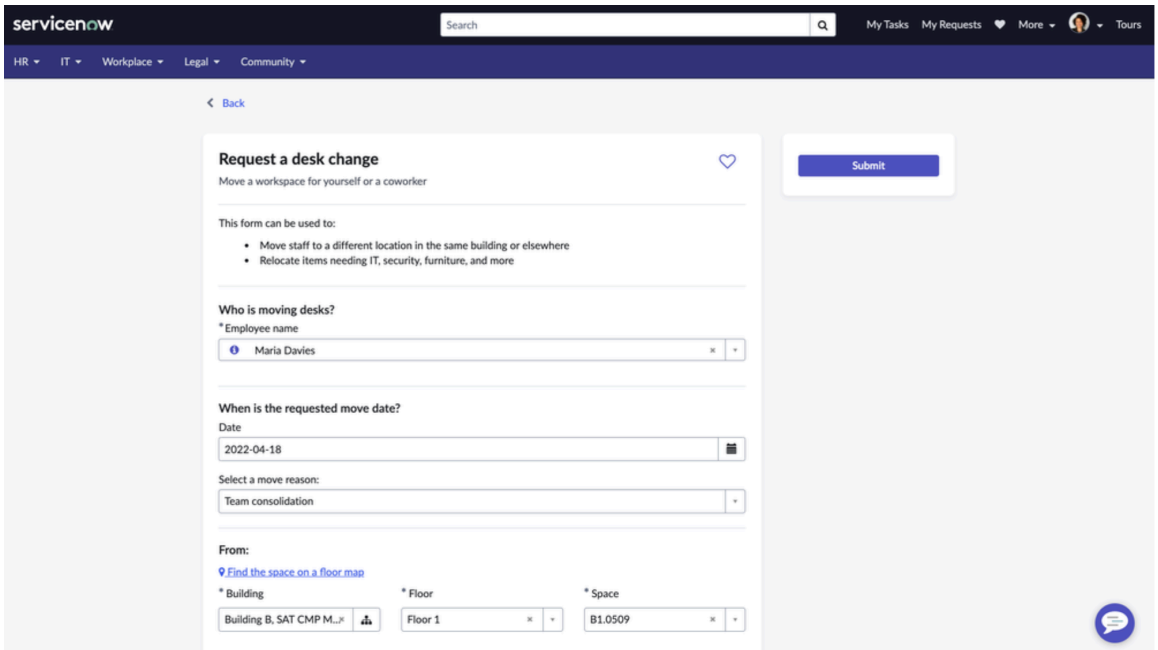
managers can make move requests through a configurable automated process so that workplace managers can supervise the movement of employees and their belongings with minimal to no disruption.



- Enable employees to submit their move requests and easily manage seat changes.
- Streamline move requests by the means of move cases and associated tasks.
- Automate and configure approvals and email notifications for relevant stakeholders.
- Modify, approve, or reject upcoming or ongoing move requests.
- Schedule and coordinate bulk moves using a visual move planning tool.
- Enable workplace teams to identify seating conflicts while executing move requests.
- Automate after-move updates.

Workplace Service Delivery for Mobile

Workplace Service Delivery for Mobile brings the capabilities of Workplace Reservation Management and wayfinding on the ServiceNow Mobile Platform to native mobile. An employee can search, reserve, modify, and check-in a reservation using the WSD Mobile app and synchronize the changes in real-time with the Workplace Service Delivery application.

- Find available spaces by applying various search criteria and filters.
- Find available spaces near a colleague or within an area.
- Reserve a space and edit your reservation using a floor map.
- Create a reservation for yourself or on behalf of a colleague.
- Manage existing single reservations.
- Check in or check-out reservations.
- Add a virtual meeting link to a reservation.
- Interactive location directories and wayfinding.

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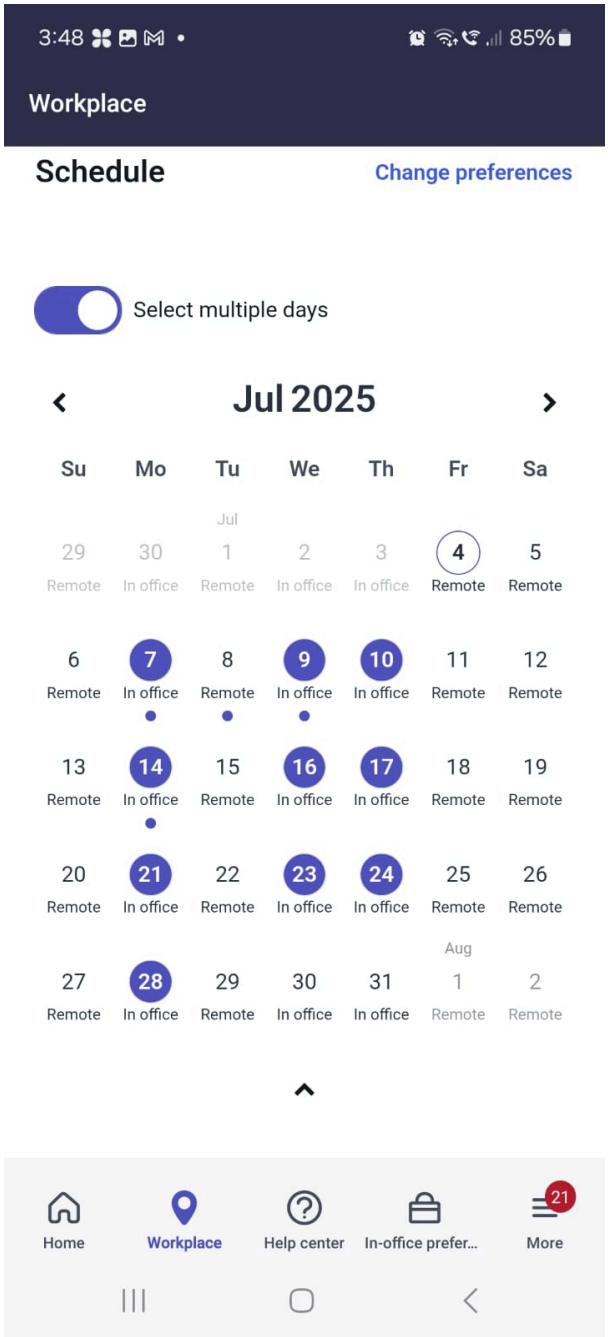

Workplace Agent for mobile

Workplace Agent for mobile delivers a mobile-first experience for workplace technicians and fulfillers to manage their work assignments and interactions with employees, without relying on any generic tools such as email, phone calls, and walkups.

The app boosts technician productivity with an intuitive interface to easily access assigned work, visibility to critical and breached cases, wayfinding to the employee location, and so on.

With the Workplace Agent for mobile application, any case fulfillment process can be simplified.

- Enable workplace technicians and fulfillers to#provide timely help to#employees.
- Easily access and manage assigned work - workplace cases and tasks.
- View the group's unassigned cases and tasks and assign to self in a single action.
- View assigned cases in a calendar view to track scheduled cases.

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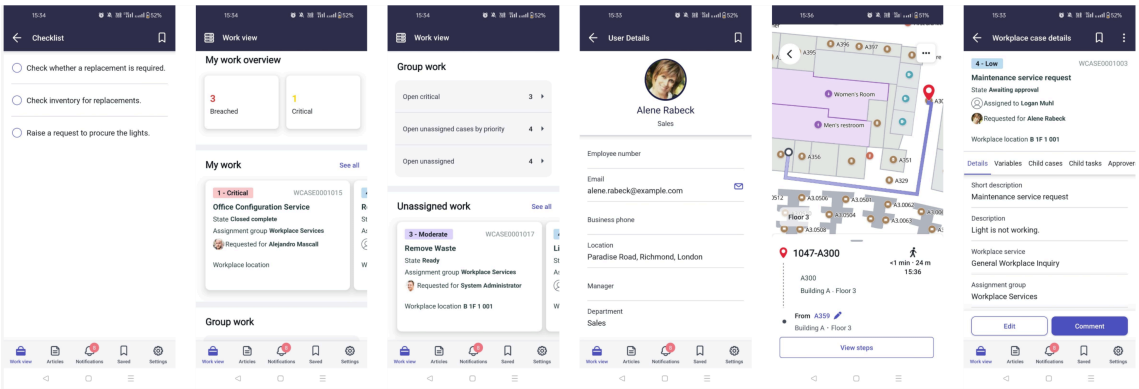
- Easily wayfinding to the workplace location of the employee or where the case is logged using maps.
- Create a workplace case on behalf of the employees.
- Log a report by creating a workplace task.
- View and search knowledge articles for the case.
- View fulfillment instructions and checklists.
- Receive push notifications on your mobile.
- Quick actions to leave comments, notes, update status, and so on



Workplace Visitor Management

Welcome your guests and off-site employees with a smoother, more hassle-free experience. Use ServiceNow® Workplace Visitor Management to optimize your front-desk operations and welcome your guests and off-site employees. You can register visitors as well as pre-plan what they will require.

Workplace Visitor Management enables employees to seamlessly register guests expected at the workplace and enables organizations to manage safe and secure check-in procedures. Once visitors are registered, automate tasks such as communications, badge printing, health surveys, and paperwork required prior to their scheduled arrival.

The workplace teams and office receptionists can easily monitor a visitor's arrival status with real-time dashboards. Tasks and approvals are automatically generated to initiate building access, grant Wi-Fi access, add a parking space, link to an existing room reservation or include any other requirements for their scheduled arrival.

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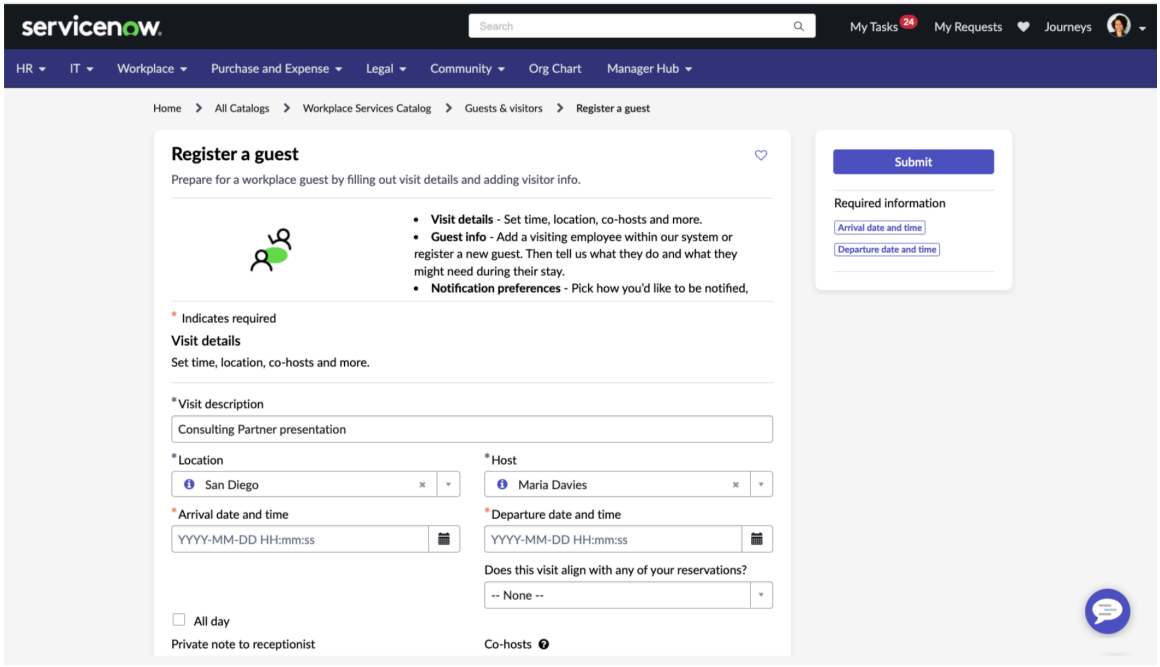

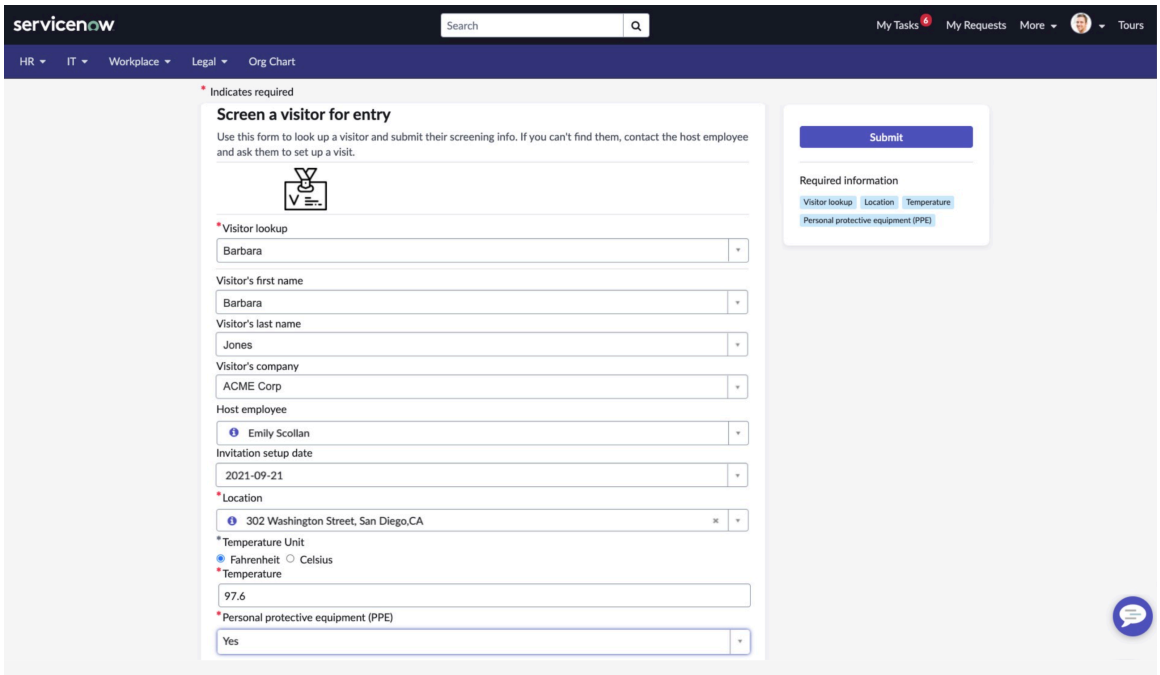

- Easily register guests visiting your premises with required entry information and guidance.
- Manage a safe and secure check-in process with automated health screening surveys and communications.
- Extend on-site access with daily pre-printed visitor badges for easy identification and check-in
- Route visitor access approvals for special locations and optimize use with advanced dashboards and reports.
- Provide visitors with a self-service check-in, registration, and check-out experience to visitors when the Workplace Services Kiosk application is installed.

Workplace Services Kiosk

The Workplace Services Kiosk provides a seamless check-in, check-out, and self-registration experience for visitors.

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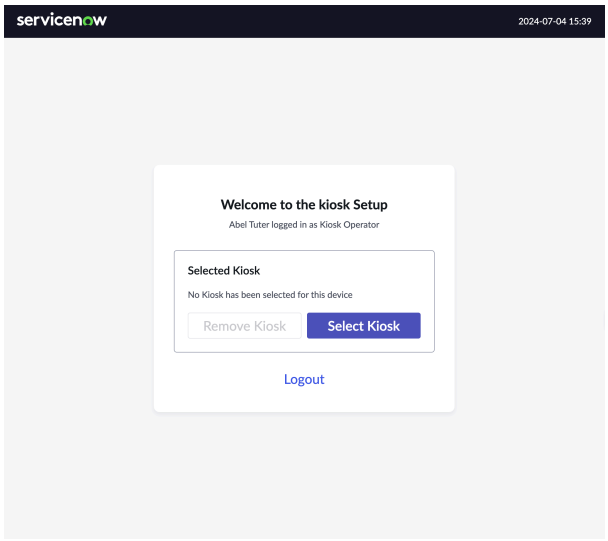
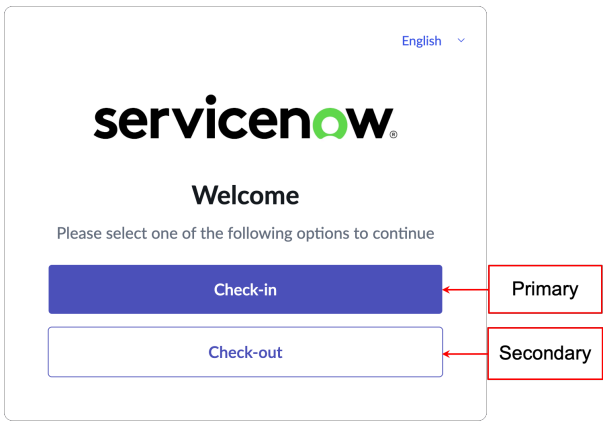
Now Assist for Workplace Service Delivery (WSD) enhances your ServiceNow® Workplace services experience with generative AI capabilities. Request spaces quickly and intuitively, add workplace services, and guests to a new reservation.

Workplace Services Kiosk provides a new kiosk portal and a UI for Workplace Service Delivery features. The initial August '24 release focuses on Visitor Management Kiosk features, including self check-in, self check-out, and self-registration, which require the Visitor Management App. The February '25 release focuses on Indoor Mapping. Future releases expand capabilities.





Workplace Services Kiosk offers:

- New Kiosk portal
- Customizable interface
- Multi-language support

If Visitor Management is installed:

- Self Check-in
- Self-Registration
- Self Check-out

If Workplace Indoor Mapping is installed, it also provides Interactive maps.

Workplace Space Mapping

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Workplace Space Mapping delivers interactive indoor maps for reservation management. It provides capabilities for indoor navigation within workplace locations to find services or amenities using inbuilt Indoor Mapping as the map provider.

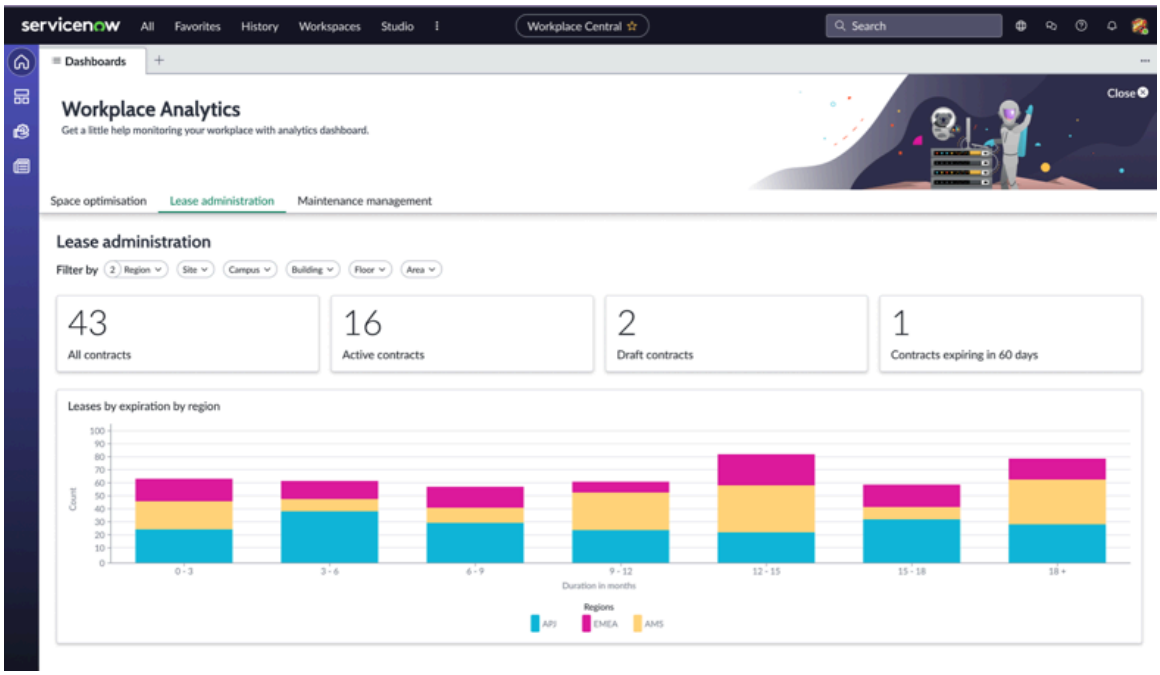
- Report a workplace issue using the floor map and notify the facilities team for fulfillment.
- Provide guided mapping experiences for employees and visitors joining you on premises with workplace wayfinding.
- Browse search, and navigate around workplaces to discover available services, reservable spaces, and amenities.
- Enable workplace managers to edit floor plans in real-time and publish changes to employee-mapping experiences for seamless navigation of workspaces.
- Switch between locations, floors, or workspaces to view or create reservations across Workplace Reservation Management and Workplace Indoor Mapping or Workplace Space Mapping.

Workplace Space Management

Efficiently supervise every single location of your organization by using the ServiceNow® Workplace Space Management application.

Workplace Lease Administration

The ServiceNow® Workplace Lease Administration enables you to create, manage and track workplace contracts from a single interface. You can also add workplace contract services, assets, locations, documents and track important dates.



Workplace Maintenance Management

ServiceNow® Workplace Maintenance Management enables workplace maintenance planners to plan for preventive maintenance for facilities assets (chairs, and so on) and soft services (house-keeping). Capture corrective or reactive maintenance issues like spills or messes or other breaks in workplace locations. Provides visibility into preventive, corrective cases, and associated trends for decision making.

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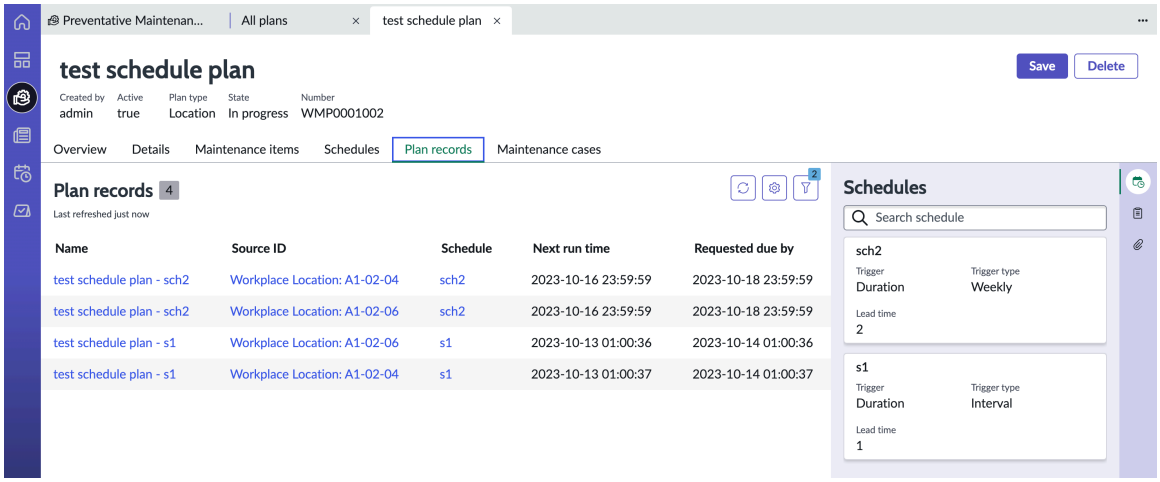
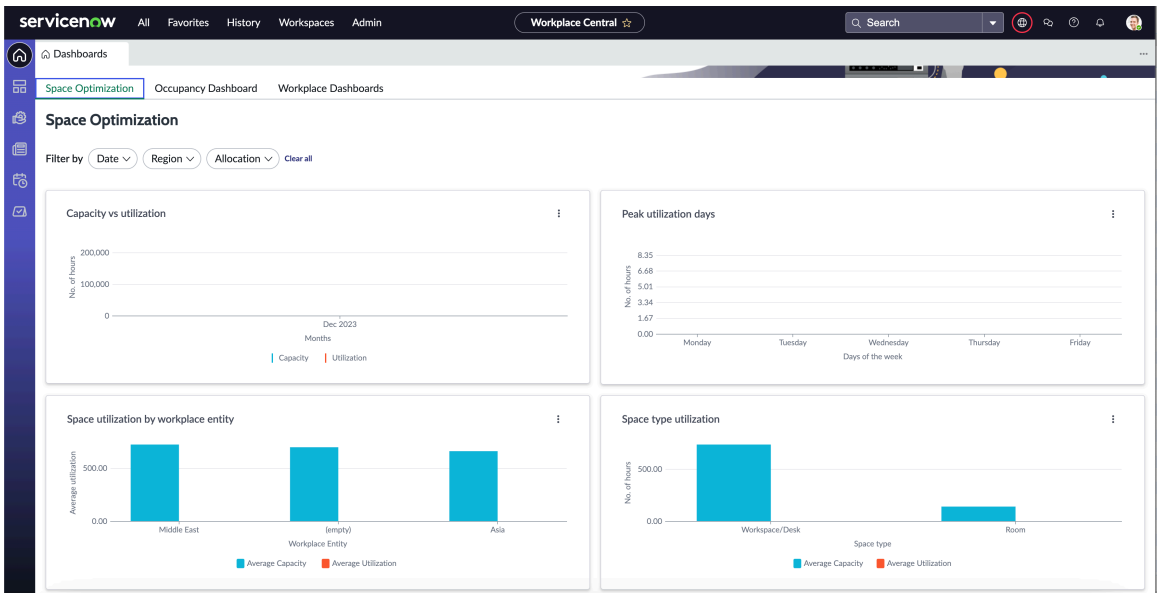


- Create preventive maintenance plans for enterprise assets and workplace locations. Perform maintenance activities like house-keeping.
- View preventive maintenance cases as part of preventive maintenance planning in the Overview tab. The Overview tab is a focus area for maintenance planners to maximize the information in one viewport.
- View preventive and corrective maintenance cases for the current month in a personalized landing page for maintenance planners.
- Use maintenance cases to log any issues for workplace maintenance, spills, messes, or breaks.

Workplace Connectors

Workplace Connectors is an integration framework leveraging employee interactions within the workplace (such as badging systems, occupancy sensors, environmental sensors). It helps drive better space utilization and optimization decisions using analytics and planning tools within the Workplace Service Delivery solution.



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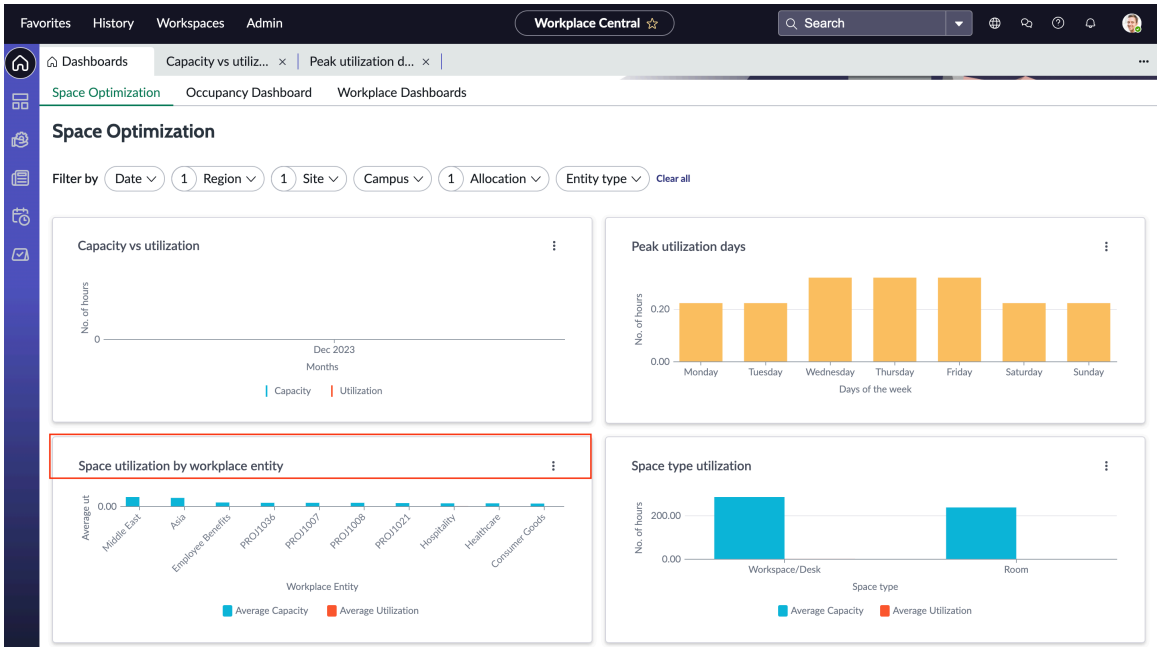

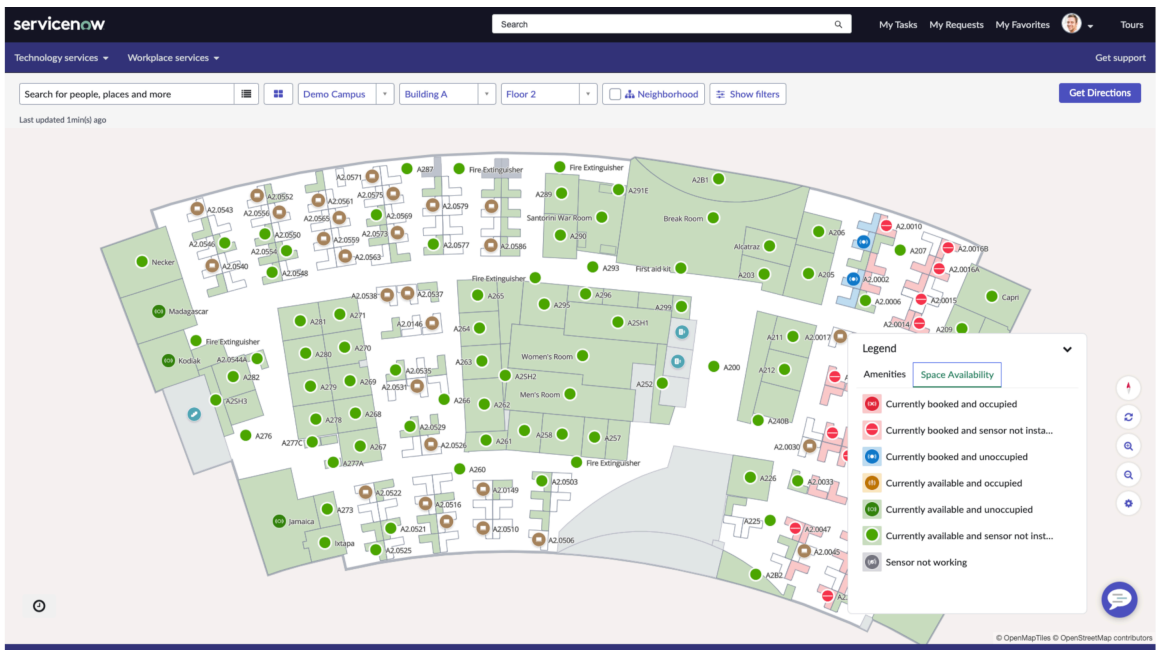

Workplace Core

The ServiceNow® Workplace Core application enables you to create safer, managed processes for employees in the workplace. You can establish distancing plans, shift assignments, and sanitation scheduling. Manage your workspace allocation in stages. The Workplace Core is the core application of the Workplace Service Delivery suite.

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Get started

Explore  Learn about Workplace Core concepts and features.	**Configure**  Configure the application and setup the workplace data to get started.	**Manage**  Monitor workplace activities, approvals, reservations and more.
Request  Request employee-related services.	**Analytics and Reporting Solutions**  Coordinate work and improve processes with dashboards and reports.	**Reference**  Get details about components like fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Workplace Core

The ServiceNow® Workplace Core application enables you to create well-maintained and well-managed processes for employees in the workplace. You can manage various units of your workplace such as workplace locations, maintenance, space administrations, reservations, requests, visitors, moves and more. The Workplace Core is the core application of the Workplace Service Delivery suite.

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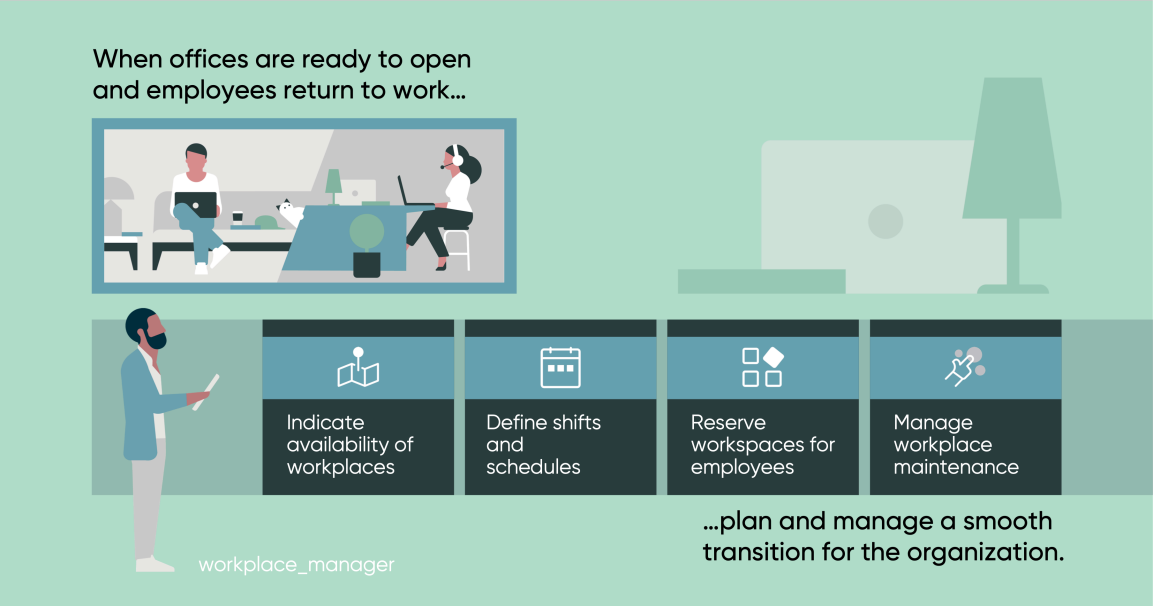

Space administration

Your organization's workplace administrators can add details for all workplace locations, such as:

- Areas such as employee workstations, conference rooms, and cafeterias
- Office buildings and campuses
- Regions of all locations

As a workplace manager, you can upload floor plans of your organization so employees can more easily view and select available spaces when they request workplace reservations.

Avoid large gatherings or long queues for locations at your workplace such as the cafeteria, gym, and entry and exit gates by defining arrival intervals and having employees schedule their arrivals.

Shift management

Workplace managers can create shifts for employees and schedule them for specific times and days. They can use this data to start planning for the occupancy levels of your workplaces by allocating employees and available workplaces to specific shifts.

For example, workplace managers can create a morning shift schedule with work hours of 08:00 to 13:00. They can then assign available workplaces to this shift based on organizational guidelines. These assigned workplaces can then be reserved for employees operating from the office during this shift.

Shift owners can review and modify the details of the shifts that they own. They can also view workplace reservations and requests made for the shifts they own.

Workplace reservations

Using the information about available employees and workplaces, workplace managers can reserve areas and workplaces for employees. Workplace managers can also generate reservations for multiple employees at once. Both the employee and the workplace manager are notified of reservations through email.

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Employees can request workplace reservations when they want to return to the office. Using interactive floor plans, they can choose to reserve workplaces for a specified date range, a single day, or a few hours. Depending on your organizational guidelines, reservation requests might require an approval for confirmation.

If the workplace profiles of all employees are set up, the application automatically assigns available workplaces for employees using the data stored in Workplace profile table.

The Workplace Service Delivery provides more advanced workplace reservation options in the Workplace Reservation Management. For more information, see Workplace Reservation Management.

Workplace tasks

Workplace managers can monitor maintenance activities that are scheduled in the workplace for each shift. They can also schedule planned or on-demand maintenance tasks, and generate reports to track the progress of these activities.

Workplace Dashboard

Using data visualizations, you can evaluate the availability of workplaces and occupancy levels of your office locations, and monitor the progress of workplace tasks on the workplace dashboard.

Workplace Case Management

As a workplace manager, you can enable employees to raise workplace-related requests. The Workplace Case Management application enables you to configure services using which employees case can raise their requests.

As a case manager, you can manage the requests raised by the employees in the form of workplace cases. You can create task, sub-tasks as per requirement and perform various other actions. For more information, refer to Workplace Case Management.

Visitor management

Manage visitors expected at the workplace. Register visitors and manage their visit such as getting a visitor agreement, printing their visitor badge, and more. For more information, refer to Workplace Visitor Management.

Manage workplace moves

As a workplace manager, the application enables you to manage the move requests raised by employees. You can track the expected start and due date by when a move must be fulfilled. You can perform various other actions. For more information, refer to Workplace Move Management.

Workplace Central

As a workplace manager, save your time by focusing on all your main workplace activities in a single workspace, that is, Workplace Central. The workplace central is a workspace available on the Employee Center. It is a one-stop workspace from where you can check all the dashboards, perform space allocation activities, manage move requests, manage reservations and more. For more information, refer to Workplace Central.

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Note:

In Workplace Core [sn_wsd_core] version 2.19.0 and above, the navigation path for Workplace Services Portal is not available in the application context search menu **AllWorkplace Core**. You can access the Workplace Service from the Employee Center portal home page. Select **Workplace Service**, **Site safety**. For more information, see Workplace services on the Employee Center portal.

Workplace Core customers using Workplace Core version 2.18.1 and later can access Workplace services portal from **All** > **Workplace Core** > **Workplace service portal** > **Workplace Service Portal Home**.

Use with other Workplace Service Delivery applications

Workplace Core is the core application of the ServiceNow® Workplace Service Delivery. Use it along with other applications that are part of the suite. For information about other applications available in the suite, see Workplace Service Delivery applications

All Safe Workplace suite applications are available in the ServiceNow Store.

Workplace Service Portal

The Workplace Service Portal is a self-service portal for employees, delivering workplace services from a central location. Employees can make reservations, view knowledge base articles, submit and review requests, and get help using virtual agent chat support.

Note: In Workplace Core [sn_wsd_core] version 2.19.0 and above, the navigation path for Workplace Services Portal is not available in the Application context menu search **All** > **Workplace Core**. You can access Workplace Service from the Employee Center portal home page. For more information, Workplace services on the Employee Center portal.

In Workplace Core version 2.18.1 and later, the navigation path is available in the application context menu search and you can access the Workplace services portal from **All** > **Self-Service** > **Employee Center** > **Workplace Services**.

From the Workplace Service Portal, you can do the following:

- Open the Reservation portal and make reservations for meeting rooms, desks, or any other reservable workplace items.
- You can also make a reservation for a time slot directly using the Reservation widget on the home page.
- Register visitors in advance and customize their visit. You can register a guest or an off-site colleague for either a short duration or a complete day.
- View and search through top-rated knowledge base articles to find information. As you type, the search field displays suggestions based on keywords.
- View your requests and approvals (if you are an approver).
- View the location directory of your organization. Search for a co-worker, a space or any workplace location on the world map.

  Note: To view the maps in the Location directory and within Workplace Reservation Management, use Mappedin and Indoor Mapping. For more information on how to use floor maps, refer to Workplace Space Mapping.

- Submit requests for general inquiry, registering visitors, shift-based reservations, and other requests.
- Chat with a virtual agent to submit requests and view submitted requests.

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- Raise a general help request by selecting from a list of service catalog items.
- Raise a move request to move from one location to another.
- Request new furniture.

Workplace services on the Employee Center portal

Avail workplace-related services using the Employee Center portal. The Employee Center portal is a unified portal that brings all the employee-related services at one place.

The Employee Center portal allows employees to raise a workplace request for a department. The Employee Center portal enables you to request a workplace service available to you. Using the Content Taxonomy Framework, you can modify the base taxonomy - Employee to provide your workplace services as child topics.

To enable **Workplace services** menu option on the Employee Center portal, ensure that you have the following plugins and applications installed:

- Employee Center plugin (sn_ex_sp). For more information, refer to: Employee Center plugins
- Employee Experience Taxonomy plugin (sn_ect)
- Workplace Service Delivery (sn_wsd) suite with all the applications.

Note: Before you install the Workplace Service Delivery (sn_wsd) plugin, ensure that you have the latest Employee Center plugin.

Workplace Services on Employee Center

After you install the required plugins, the **Workplace Services** menu option appears on the Employee Center homepage. Select it to raise workplace service requests.

The **Workplace Services** option shows the list of following workplace services:

- **Furniture and Supplies**: Request a furniture or an equipment for your workplace or any meeting.
- **Events**: Register a guest or a co-worker for a visit or for an upcoming event.
- **Site safety**: Raise workplace-related requests such as general reservation and shift-based reservation. View the location directory, add a shift or a task. Schedule your arrival.
- **Maintenance**: Raise a request to change your office setup or for any general inquiry. Add a planned task definition.

Enabling Workplace services on the Employee Center portal

The base taxonomy - Employee, is installed when you install the Employee Experience Taxonomy plugin. Complete the following tasks to enable Workplace services on the Employee Center portal:

- Customize the taxonomy. First, copy the base taxonomy and then make the required changes.
- Create the content, such as Create a workplace service record producer or Knowledge base article.
- Associate the content to the taxonomy.

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Related topics

- Setting up Employee Center
- Unified taxonomy for Employee Center
- Create a topic

Virtual Agent for Workplace Service Delivery

Workplace Service Delivery provides you with delivered conversations in Virtual Agent, which is an automated chatbot that enables employees to request services or raise inquiries. The Virtual Agent is available on the Employee Center where employees can find all their workplace-related information.

For more information about Virtual Agent, see Virtual Agent.

Predefined Virtual Agent topics for Workplace Service Delivery

As an employee, you can use the Virtual Agent chat support available in the Workplace Service Portal to request workplace services or know the status of any requested service. You can select the chat icon () displayed at the bottom-right of the portal to start a conversation with the Virtual Agent.

The Workplace Service Delivery Virtual Agent enables you to raise requests and view updates related to reservations, visitor registrations, and workplace service requests. The following predefined topics are available in the Workplace Service Delivery Virtual Agent chatbot:

Workplace Reservation Management

- Create a reservation for a location
- View reservations for the current day
- See when your reservation will start or happen
- Cancel a reservation

Workplace Case Management

- Request a workplace service
- View the status of your submitted cases
- View the cases that are awaiting acceptance

Workplace Visitor Management

- Register a guest
- See your expected visitors for the current day
- See when your visitor is expected to arrive
- Cancel a registered visitor

Activate Virtual Agent for Workplace Service Delivery

To activate Virtual agent for Workplace Service Delivery, activate the following plugins:

1. Activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) that provides the Virtual Agent framework.
2. Activate the Workplace Core plugin (sn_wsd_core).

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For more information, refer to Activate Virtual Agent for Workplace Service Delivery.

Configure Workplace Core

Install Workplace Core application. Provide your workplace data to configure spreadsheets and import workplace data. Modify your existing spreadsheets. Upload floor plans to provide floor maps for a selected floor.

Workplace Core administrators can install and configure the Workplace Core and application to enable workplace services for employees. It covers installation of Workplace Core application, preparing and importing workplace data, and enabling supporting capabilities that enable employees to interact with workplace services effectively. Administrators can set up workplace locations, spaces, and upload floor plans.

Workplace Service Delivery administrators can configure the following:

- Workplace Core application and dependent plugins, if necessary.
- Create campus, buildings, floors, and spaces.
- Upload and maintain workplace floor plans.
- Enable Now Assist in Virtual Agent to support conversational workplace services.

Installing Workplace Core sets up the Workplace Core data model and Workplace Service Delivery capabilities. After installation, administrators can create campuses, buildings, floors, and spaces for employees to make reservations. Workplace Core enables reservations, space recommendations, and workplace services to employees.

Workplace data can be created and maintained directly in the system or imported in bulk using configured spreadsheets, maintaining consistency and accuracy. Visual floor plans can also be uploaded and updated to reflect the physical layout of the workplace. This enables employees to view and select spaces using floor maps.

Enabling Virtual Agent provides employees with a conversational interface for workplace interactions, improving accessibility and self service capabilities.

Install Workplace Core

You can install the Workplace Core application if you have the admin role. This application includes optional demo data.

Before you begin

Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following components are installed with installation of the Workplace Core application:

- Roles
- Tables

See Components installed with Workplace Core for more information.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

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You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.

3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed.

   Installing your application also automatically installs the dependent applications or plugins if they are not installed already.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.
   Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Note: If you don't load the demo data for a store application during installation, it is not available to load later.

6. Click **Install**.

Providing your workplace data

In the Workplace Core application, provide data related to your workplace locations and designate workspaces.

Workspace Record

The information available for each workspace record is:

- Region
- Site
- Campus
- Building
- Floor
- Area
- Space

Each designation should use a unique identifier.

Entering data for several work sites

Large organizations can use spreadsheets to store shared location data such as regions, buildings, sites, eliminating manual re-entry for each workspace. You can either export the information you have already entered into the application into a spreadsheet or use that information in an existing workspace spreadsheet. You can then import the spreadsheet that contains the full workspace data into the application in bulk form.

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- If you have an existing spreadsheet, you can manually convert the column headers and data of the global information to match the ServiceNow record names and identifier numbers. You can then do a bulk import of that data into the Workplace Core application so you can assign workspaces.

  For example, say your organization's spreadsheet uses the name "Location" for Sites or "Bldg 1" for every building 1 on every site. You have to change the spreadsheet column header "Location" to "Sites" and change each "Bldg 1" to the unique identifier from the Workplace Core application records.

- If you don't have an existing spreadsheet, you can enter the repeated global information that you don't want to have to input manually for each space. The data for each field should have a unique identifier. You can then export the information from the application into a spreadsheet where you have to input only the space information manually.

Floor plans

The ServiceNow AI Platform supports Drawing eXchange Format (.dxf) files for floor plans. You can select the layers you need for end-user floorplans and configure the attributes (tags) you want assigned to fields. For information about how to export an AutoCAD .dwg file to a Drawing eXchange Format (.dxf) file, see the documentation for your version of AutoCAD.

Before uploading a .dxf file, work with your AutoCAD designers to verify the following:

- The file uses block references and not single-line or multi-line text for space labels.
- The blocks attributes have human-understandable tags.
- The block references have attribute values appropriately set.

Note: Using blocks is highly recommended. Don’t use text objects.

Uploading a floor plan creates a floor record. All the workspaces of the floor are automatically added to the Spaces related list of the floor record.

Create records for your workplace data

Create individual records of your workspaces, floors, office buildings, and workplace locations within the Workplace Core application. Either insert new data or add records to the existing workplace data.

Before you begin

Ensure that you have the following details:

- Workplace data for your organization.
- Data of workspaces that can be marked as available.

Role required: sn_wsd_core.admin

About this task

If you have a small number of workspaces, you can enter information individually for each workspace down to the Spaces level.

If you have many work sites, you might want to do the following:

1. Create a skeleton of repeated global information.
2. Add the individual spaces information in a spreadsheet.

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3. Import the spreadsheet into the application.

   For more information on importing, see Configuring spreadsheets to import workplace data.

If you have floor plans, you can create records of data until the Buildings level. Uploading the floor plans loads the data of floors and of the spaces associated with these floors.

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select the applicable module.
   Create the records in the following order:
   - Regions
   - Sites
   - Campuses
   - Buildings
   - Floors
   - Areas
   - Spaces
   - Order

   For example, if you want to create locations of your offices, select **Sites**.
3. On the form, fill in the fields.

Note:

- The visibility of some of the following fields depends on the module that you selected.
- You can leave a field that does not apply to your organization empty.

The fields on the form differ based on what module you selected. For example, the following form is for Building.

Building form

Field	Description
Name	Name of the workplace. Ensure that you enter a unique name. For example, if the **Building** field is set to **1C**, and if the **Space** field is set to **WST 1C 1601**, then an appropriate value for the **Name** field can be `1C-16` **Note:** Do not use workplace locations with the same name because it affects the reservation process.
Region	Region where the office is located. If your organization is located at several regions, select that region where the office that you are adding is located.
Site	Location of the office campus. If there are several sites in a region, select that site

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Field	Description
	where the office that you are adding is located.
Campus	Name of the campus where the office operates. If there are several campuses in a site, select that campus where the office that you are adding is located.
Building	Name of the office building for this workspace. If there are several buildings in a region, select that building where the office that you are adding is located.
Floor	Name or number of the floor where this workspace is present.
Area	Name of the area on the office floor.
Managed by group	Group that manages the entire workplace-related operations.
Managed by	Workplace manager who manages all the workplace-related operations.
Time Zone	Time zone of the location where the building is located.
Active	Option to indicate that this space is active.
Is reservable	Option to indicate that the spaces for this workplace entity are available for reservation. For example, if you do not mark a Building as reservable, then none the floors, areas, and spaces of this building would be available for reservation.
Street	Street details of the location where the building is located.
City	City where the building is located.
State/province	State/province where the building is located.
Zip/Postal Code	Zip/postal code of the location where the building is located.
Space type	Type of the office space. To configure a new space type, see Add a space type configuration.
Latitude	Latitude of a campus or a building. The latitude is displayed in the Workplace Service Portal Location directory map.
Longitude	Longitude of a campus or a building. The longitude is displayed in the Workplace Service Portal Location directory map.
Enable employee location privacy and preference	Location privacy preference for the building. The following options are provided:

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Field	Description
	○ **None**: Select this option if you don't have any particular privacy preference on the building. When you set this option, the privacy preference that is set by your organization is considered. The field is set to **None** by default. ○ **No privacy**: Select this option if you don't have any privacy requirement. ○ **Workplace profiles only**: Select this option to set privacy on workplace profiles. ○ **Reservations only**: Select this option to set privacy on workplace reservations. ○ **Reservations and workplace profiles**: Select this option to set privacy on both workplace profiles and workplace reservations.
Allow employees to override location privacy on reservations	Specify if you want to let employees override the location privacy while reserving spaces that belong to this building. The field provides the following override options: ○ **None**: Select this option if you don't have any particular privacy requirement. When you set this option, the location privacy override preference that is set by your organization is considered. The field is set to **None** by default. ○ **Yes**: Select this option if you want to let employees override the privacy preference that is configured for the location that they want to reserve. ○ **No**: Select this option if you want to restrict employees from overriding the privacy preference that is set on the location that they want to reserve.

4. Click **Submit**.

Result
The workplace location record is added.

What to do next
- If you have floor plans for your workplace, you can upload them to create and display floor and workspace data. For more information, see Upload a workplace floor plan.
- If you are using a spreadsheet to enter and import bulk data for workspaces, see Configuring spreadsheets to import workplace data.
- If you have added all of your workplace data, you can define employee shifts. For more information, see Define shifts for your workplace.

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Upload a workplace floor plan

Upload Drawing eXchange Format (.dxf) files of floor plans that you can configure and use to reserve space for your employees.

Before you begin

Use workplace floor maps to find and reserve a space within Workplace Core. To view the maps in the Location directory and within Workplace Reservation Management, use Mappedin and Indoor Mapping. For more information on how to use floor maps, refer to Workplace Space Mapping.

To avoid issues while rendering your floor plan, verify that the dxf.json attachment size is 5 MB or smaller. To view the size, download the dxf.json file and view the file properties. If the file size is larger than 5 MB, you can:

- Work with your AutoCAD designers to ensure that spaces are represented as blocks (not single or multi-line text).
- Ensure that the block reference attributes are appropriately set and try to import the dxf.json file again.
- Set the *com.glide.attachment.max_get_size* property to a size that is greater or equal to the dxf.json file size. For more information, see Administering attachments.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Upload Floor Plan**.

   In Workplace Core version 2.19.0 and above, the navigation path for **Upload floor plan** is not available in the application context menu search **All** > **Workplace Core**.

   In Workplace Core version 2.18.11 and later, the navigation path is available in the application context menu search **All** > **Workplace Core** > **Upload floor plan**.

2. On the form, fill in the fields.

Manage Workplace Floor form

Field	Description
Number	A unique number automatically generated by the application that identifies the floor plan.
Name	Name of the floor plan. **Note:** Be specific and have a consistent naming convention when naming your floor plans.
Region	Geographic location of the building the floor plan represents. Select the Lookup using list icon to view a list of regions you can select.
Site	The location of the office or campus within a region.

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Field	Description
	Select the Lookup using list icon to view a list of sites you can select.
Campus	Name of the campus if you have multiple buildings at a site.
Building	Name of the specific building if you have multiple buildings at a campus.
Active	Option to indicate the floor is active.
Is reservable	Option indicating whether the space manager can reserve this plan for employee use.
Managed by group	The group that manages the space reservation for the floor plan. Select the Lookup using list icon to view a list of groups you can select.
Managed by	The workplace manager of the group that manages the space reservation for the floor plan. Select the Lookup using list icon to view a list of group managers you can select.

3. Select the attachment icon and upload your Drawing eXchange Format (.dxf) file.
   After you attach your .dxf file and import the floor plan, the .dxf file converts to a dxf.json file in your attachments. Don't remove any of these files or your floor plan does not appear. Also, the dxf.json file size must be 5 MB or smaller. Try selecting fewer layers from your .dxf file during the import process.
4. Select **Next**.
5. In the Select layers column on the right, select the layers that you want to appear the plan.
   For example, you might not want electrical rooms, kitchens, storage closets, or other elements to appear on the floor plan when it renders.
6. Select **Render**.
   The floor plan appears under the **Preview plan** tab. Use your cursor to zoom in and out of the floor plan.
7. Select **Next**.
8. On the form, fill in the fields.

Assign tags to fields

Field	Description
AutoCAD tag	The tag you want to map to your space fields. Tags identify spaces on the floor plan and come from the uploaded .dxf file.

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Field	Description
	The tags that appear are the ones you selected in the **Select layers** column. **Note:** If you do not see any AutoCAD tags, you can use AutoCAD software to change text or text objects into block references.
Space Field	The field in the Space [sn_wsd_core_space] table with which you want to associate the tag. For example, you could associate an attribute named ROOM_NAME with the **Name** field and give it a higher order so it is the second part of the Name. The Space Field represents a specific location on the floor plan that you can assign to an employee.
Order	Determines the order of processing for your AutoCAD tag to Space Field mapping. **Note:** Lower numbers process first.

9. Select **Submit**.

Result
A new floor record is created with the floor plan attached to it. The Spaces related list is populated with all the workspaces of this floor.

Update a workplace floor plan

Update a workplace floor plan by uploading a new plan.

Before you begin
Role required: sn_wsd_core.workplace_manager

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration** > **Floors**.
2. Select the floor you want to update.
3. Select the **Update floor plan** related link.
4. Select **Manage Attachments**, delete the current floor plan file, and attach the new floor plan file.
   You can have only one .dxf file uploaded at a time.
5. Select **Next**.
6. In the Select layers column, select the layers that you want to appear on the floor plan.
   For example, you might not want electrical rooms, kitchens, storage closets, or other elements to appear on the floor plan when it renders.
7. Select **Render**.
   The floor plan appears under the **Preview plan** tab. Use your mouse to zoom in and out.

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8. Select **Next**.
9. On the form, fill in the fields.

Assign tags to fields

Field	Description
AutoCAD tag	Tags from the uploaded .dxf file identify spaces on the floor plan. The tags that appear are those that you selected in the **Select layers** column. **Note:** If you do not see any AutoCAD tags, you can use AutoCAD software to change text or text objects into block references.
Space Field	The field in the Space [sn_wsd_core_space] table with which you want to associate the tag. For example, you could associate an attribute named ROOM_NAME with the **Name** field and give it a higher order so it becomes the second part of the name.
Order	Determines the order of processing for your AutoCAD tag to Space Field mapping. **Note:** Lower numbers process first.

10. Select **Preview Changes** and in the **Preview changes** tab, review the changes you are going to make before you commit them.
11. Select **Submit**.

Result
The following changes occur:

- Map values are filled in.
- Existing spaces that no longer match are deleted.
- If old spaces have been renamed, the new names replace the old ones.
- Any reservations are deleted.

A original floor record is updated with the floor plan attached to it. The Spaces related list is also updated. To view your changes, go to **Floor Plan Update Logs**.

Configuring spreadsheets to import workplace data

Import work location data in bulk through spreadsheets into the Workplace Core application to avoid manually entering redundant data for each workplace, which saves time and effort.

By using a spreadsheet that contains the global information for your work sites, you can enter only the distinguishing space information instead of manually repeating information such as region, site, building, and floor. You can either create an Excel spreadsheet from the data already entered into the Workplace Core application or modify an existing workplace spreadsheet.

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Configure an existing workspaces spreadsheet

Customize the information in your organization's existing workspace spreadsheet to avoid having to manually enter repeated information for each workspace. You can then import the data into your ServiceNow instance.

Before you begin

Role required: sn_wsd_core.admin

About this task

If you have a spreadsheet containing your organization's workspaces data, you need to customize it to match the record information in your ServiceNow instance.

This example describes how to modify the floor information for your workspace data. Repeat these instructions to replace the fields for your building, campus, site, and region, as appropriate.

Procedure

1. Modify the data in the spreadsheet to match the record information in your ServiceNow instance.

   a. Navigate to **Workplace Safety Management** > **Space Administration** > **Floors**.

   b. Search for the desired floor record and open it.

   c. Copy the value of the **Number** field.

   d. Paste the value in place of "Floor 1" in the Excel spreadsheet.

   The example uses the following sample entry for workspaces that belong to Floor 1 of Building 1 at Florida Campus 2, Florida, USA:

   - FLOR0001694 represents Floor 1
   - BLDG0001028 represents Building 1
   - CMPS0001013 represents Florida Campus 2
   - SITE0001007 represents Florida
   - RGIN0001002 represents USA

   Note: You can exclude the **Area** column as it is not mandatory. Enter a dummy value in the column instead of leaving it empty.

A	B	C	D	E	F	G	H	I
Name	**Area**	**Floor**	**Building**	**Campus**	**Site**	**Region**	**Is reservable**	**Active**
B 1F 1 001		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE
B 1F 1 002		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE
B 1F 1 003		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE
B 1F 1 004		Floor 1	Building 1	Florida Campus 2	Florida	USA	TRUE	TRUE

2. In your workspaces spreadsheet, add individual workspace information in the **Name** column.
3. Save your spreadsheet.

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Create a workplace data spreadsheet

Create a Microsoft Excel spreadsheet from the data you entered into the Workplace Core so you can avoid having to manually enter global information such as the site or building names for each workspace. You can then import the data into your ServiceNow instance.

Before you begin
Role required: sn_wsd_core.admin

About this task
If you have a large number of work sites, consider creating a spreadsheet that you can then import into your ServiceNow instance to avoid having to manually enter global information such as the site or building names for each workspace.

Note: If you already have an existing workspaces spreadsheet for your organization, follow the instructions in Configure an existing workspaces spreadsheet to customize it for exporting the data.

Procedure
1. Navigate to **All** > **Workplace Safety Management** > **Space Administration**.
2. Select the module for the smallest unit for which you want to repeat the data.

   For example, if you have created global information records of regions, sites, buildings, and floors, you would select **Floors**.
3. **Optional:** Customize the columns to be displayed.
   For example, you can choose to hide the **Campus** column if your organization does not have campuses by entering a dummy value instead of leaving it empty.
4. Export the data by holding and selecting (or right-clicking) on any column, selecting **Export**, and selecting **Excel (.xlsx)**.
   Data is exported from the application so that you can download it as an Excel file.
5. Select **Download**.
6. In your workspaces spreadsheet, add individual workspace information in the **Name** column.
7. Save your spreadsheet.

What to do next
Import your workspaces data from an Excel spreadsheet

Activate Virtual Agent for Workplace Service Delivery

Activate Virtual Agent for Workplace Service Delivery to provide user assistance to employees through a chat interface.

Before you begin
Role required: admin

About this task
- Activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) that provides the Virtual Agent framework.
- Activate the Workplace Core plugin (sn_wsd_core).

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store. Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release note information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   If your application requires other applications, install them first if they are not already installed.

   Installing your application also automatically installs the dependent applications or plugins if they are not installed already.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.
   Some applications include demo data, which are sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Note: If you don't load the demo data for a store application during installation, it is not available to load later.

6. Click **Install**.

Important: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

Manage workplace safety activities

Monitor your workplace activities. Perform workplace-related actions using the Workplace Core application such as import data, managing locations and configuring other workplace-related settings.

Manage workplace safety activities by adding a space type configuration, blocking a location, managing neighborhoods and so on. Starting from Workplace Core version 2.3, time zones are introduced, and all arrival schedules from version 2.2 and earlier are deactivated after upgrade. From version 2.16.1, the Department and cost center allocation types are no longer available. They're replaced with the new Workplace entity allocation type. Additionally, workplace user profiles are created in the Workplace Profile Location Assignment. For workplace entities, you can only view and make map-based space administration; you can't create scenarios. To view neighborhoods on a floor map, install the Indoor Mapping plugin and its dependencies.

Import your workspaces data from an Excel spreadsheet

Import your workspaces data from an Excel spreadsheet into the Workplace Core application.

Before you begin
Role required: sn_wsd_core.admin

About this task
Complete Configuring spreadsheets to import workplace data.

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Procedure

1. Navigate to **All** > **System Import Sets** > **Load Data**.
2. Select **Existing table**.
3. In the **Import set table** field, select **Space Staging [sn_wsd_core_space_staging]**.
4. In the **Source of the import** field, select **File**.
5. Select **Choose File** and select the source Excel spreadsheet.
6. **Optional:** Specify the worksheet number in the **Sheet number** field and header row number in the **Header row** field.
7. Select **Submit**.
   The imported data is now available in the new Import Set table.
8. Select **Run Transform**.

   Important: Ensure that the Import set field shows sn_wsd_core_space_staging and the selected map is Space Transform map - sn_wsd_core_space.

9. Select **Transform**.
10. **Optional:** Verify that the data records were imported into the Spaces table by navigating to **Workplace Safety Management** > **Space Administration** > **Spaces**

What to do next

Define shifts for your workplace

Related topics

Run an import

Create a transform map

Add a space type configuration

Configure the different types of workspaces available in a workplace. You can add spaces based on different space types (Workspace/Desk). Space type enables employee to identify the different types of workspace available on a floor

Before you begin

Role required:sn_wsd_core.admin or sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Space type configuration**.
   The Space Types page opens.
2. Select **New**.
3. On the form, fill in the fields.

Space Type form

Field	Description
Name	Descriptive name of the space type.
Code	Code for the space type. The code can also be a name.

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Field	Description
Table	Table of the space type. The field is automatically set to **Space [sn_wsd_core_space]**. If the space type is a room, select **Room [sn_wsd_core_room]**.
Application	Application of the space type. This field is automatically set. For example: Workplace Concierge
Active	Option to activate the space type.
Available for	Option to specify the type of users for whom the space type is available.

4. Select **Submit**.

Result
The space type is configured. You can select this space type while creating a space or a type mapping.

Configure a workplace card

Create a workplace card to be used in your workplace applications.

Before you begin
Role required: sn_wsd_core.admin

About this task
Card configuration enables admins to tailor the display and functionality of space cards across modules like Reservation, Location Directory, and Kiosk Indoor Mapping. You can control visible fields and available actions like reserving a space or copying a URL. You can also add multiple card configurations to a single page, using conditions to determine which card is displayed.

Procedure
1. Navigate to **All** > **Workplace Core** > **Card configuration**.
2. On the Workplace Card Configurations list, select **New**.
3. On the form, fill in the fields.

Workplace Card Configuration form

Field	Description
Name	Name of the card configuration.
Template	UI template that is used for the card. You can use existing templates or create your own by using UI macros. For more information, see UI macros.
Order	Order of the card configuration.
Table	Table that is used to generate the fields on the card.
Applications	Applications that use the card configuration. You can select Location Directory, Reservation, and Kiosk Indoor Mapping.

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4. Add conditions for the card configuration.

   The conditions determine where the card is displayed in the selected applications. For example, if the table is `Space [sn_wsd_core_space]` and the condition is `Active is true`, the card is displayed only for active spaces.

   The fields in the condition builder are fetched from the selected table. For more information about the condition builder, see Condition builder.

5. Select **Submit**.

Configure a space details card

Configure a space card in the Location Directory, Kiosk Indoor Mapping, or Reservation by updating the card's template with the specific details that you want to customize. You can configure a new field, button, or style for each space card.

Before you begin

Role required: admin

About this task

Card configuration allows you to customize the appearance and features of space cards. Choose the space card you wish to modify, and add a new field or button, or apply a style as needed.

Procedure

1. Navigate to **All** > **Workplace Core** > **Card configuration**.
2. Select the **Default space card** for space cards.
   Cards are available for users, neighborhood, spaces, and rooms.
3. Verify the application scope and edit the details.
4. Open the `WsdConfigurableSpaceCard` Template and edit the record.
5. In the XML script, insert a new HTML division ( ) where you want the new field to appear.

   The following is the sample script for adding the usable_size_sq_meter field.

```
<div class="info-row" ng-if="data.usable_size_sq_meter">
<div class="info-icon">
<i class="fa fa-arrows-alt"></i>
</div>
<div class="info-text">{{ data.usable_size_sq_meter }}m
 square</div>
</div>
```

6. Save the record.
7. Navigate to **All** > **System Definition** > **Script Includes**.
8. In the Name column, search and select WSDConfigurableCardDataInjector.
9. In the Script, add or update the function to ensure the new field is provided to the template.
   The following is the sample function for adding the usable_size_sq_meter field.

```
cards.forEach( function(card) {
if (card.type ==='space') {
var spaceGr.get(card.data.sysId)) {
card.data.usable_size_sq_meter =
 spaceGr.getValue('usable_size_sq_meter');
}
}
```

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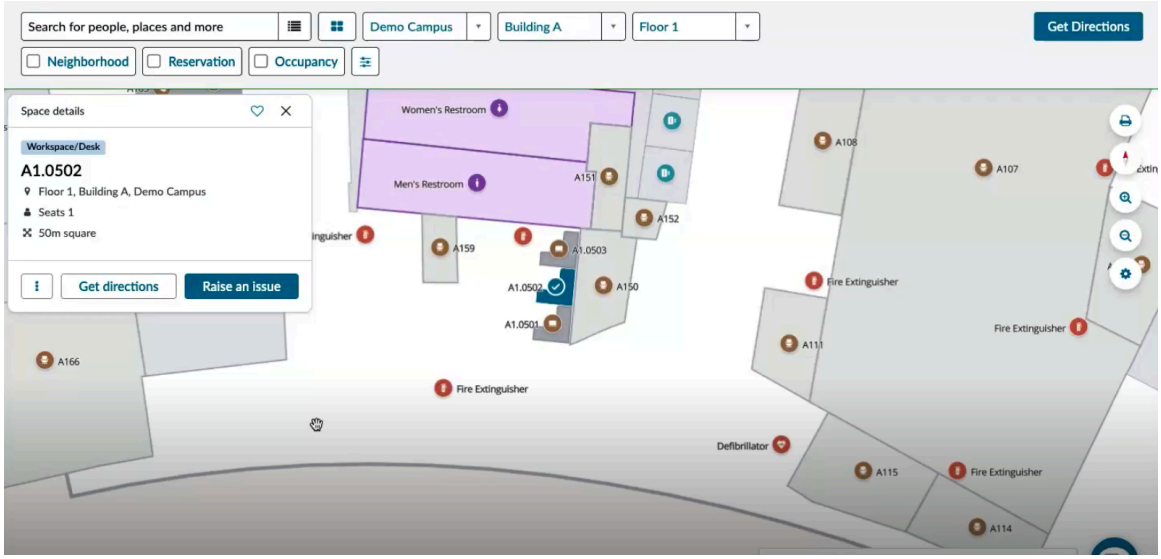
```
});
```

10. Navigate to the Location Directory and select the space where the new field has been added.
11. Confirm the new field appears in the space card.



Block a workplace location

Block a workplace location for a specific period. The blocked workplace location is unavailable during the specified period for any type of reservation on the Workplace Reservation Management Reservation portal.

Before you begin

Note: The blocked location is unavailable only on the Workplace Reservation Management Reservation portal for reservation.

Role required: sn_wsd_core.admin

About this task

You can block a workplace location, such as a region, a site, a campus, a building, a floor, an area, a room, or a space. When you block a location, the location is unavailable for any type of reservation on the Workplace Reservation Management Reservation portal. Because of the block action, any existing reservations made on the workplace location are automatically canceled.

You can also block a location directly. Open the location and select the **Block location** option on the form.

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Block location**.
2. Select **New**.
3. On the form, fill in the fields.

Block Location form

Field	Description
Number	Number of the location. This field is automatically set.
Location	Location that you want to block.

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Field	Description
Opened by	User who is blocking the location.
Reason	Reason for blocking the location. Select from a list of available options.
Comment	Comment that explains the reason for blocking the location or any important information.
Active	Option to activate the block action.
Progress state	Current progress state of the block action.
Start time	Start time of the block.
End time	End time of the block.

4. Select **Submit**.

Result

The workplace location is blocked for the specified period. You can't make any reservations for the location on the Workplace Reservation Management Reservation portal during this period. All existing reservations that are made on the workplace location are canceled.

Configure Workplace entity and entity types

Create a business hierarchy based on your organization's businesses. Allocate workplace locations based on the business to which they're associated with. Configure workplace entity types and workplace entities to create the structure. For example, add entity types such as Business Units, Marketing Units, and associate workplace entities such as ITSM, Facilities, and more under them.

The Workplace Core applications enable you to classify your workplace locations based on their cost center, department, and workplace entity. The workplace entity-based allocation helps you in create an organized business structure where you can configure parent-child-based hierarchies and manage various workplace-related activities. You can create a structure exactly as your organization's business by configuring workplace entity types and workplace entities. You can associate locations based on the business to which they're associated with.

As a workplace manager, you can manage space allocations based on their entity levels that are set and verify proper space utilization according to business. You can visualize data on the stack plan and floor map based on the workplace entities that you've configured. You can view the space allocations of a building based on workplace entities. At any time, you can select a space and know its hierarchy level, that is, the details of its parent and child if present. This business-based hierarchy model, that is, workplace entity-based allocation, enables you to control the space consumption of each business in your organization. The Space Optimization dashboard also enables you to visualize data based on the different workplace entities configured. For more information about how workplace entities and other allocations work, refer to Allocation - types, setting, and impact.

Important: You can't create a scenario based on workplace entities. You can only view and make map based space administration for workplace entities.

At any time, you can filter your workplace locations and perform various actions easily on these entities directly. The application enables you to specify an order to each entity type based on which a hierarchy is set. For a parent-child hierarchy, you can also perform direct actions on a parent if you want to implement the same throughout its child entities.

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With the hierarchy-based configuration, you can perform the following actions:

- You can create various entity types and set their level using the entity-mapping options. When you create workplace entities, you can assign them to these entity types.
- You can set the order of an entity type based on its level in the hierarchy. The lower the order, the higher the entity type is set in the hierarchical structure. The lowest ordered entity type is set in the highest level in the hierarchy. For example, if you set ABC with order 1000 and XYZ with order 600 then XYZ is placed on top in the hierarchy level and ABC is set to lowest.
- You can use the **Push down** option if you want to push down the workplace entity to child locations at any time. For more information about how an allocation works, refer to Allocation - types, setting, and impact.
- You can activate or deactivate a workplace entity. Deactivating a workplace entity also deactivates the child workplace entity.

Important: If the parent is inactive, you can't activate a workplace entity.

Add a workplace entity type

Create an entity type according to your organizational requirement. You can group your workplace entities under this entity type and perform various actions on all entities that belong to this type at a time.

Before you begin

Role required: Workplace manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Workplace Entity Types**.
2. Select **New**.
3. On the form, fill in the fields.

Entity Type form

Field	Description
Name	Name of the entity type. For example, Business Unit, Marketing Units, Projects and more.
Entity-mapping column	Workplace entity reference column from the Workplace Entity table where the denormalized workplace entity information is stored.
Order	Order of an entity type based on its level in the hierarchy. The lower the order, the higher the entity type is set in the hierarchical structure. The lowest ordered entity type is set in the highest level in the hierarchy. For example, if you set ABC with order 1000 and XYZ with order 600 then XYZ is placed on top in the hierarchy level and ABC is set to lowest.
Active	Option to activate the entity type.

4. Select **Submit**.

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Result
The entity type is created.

What to do next
Add workplace entities to an entity type

Add workplace entities to an entity type

Create workplace entities based on your organization's business structure. Specify the entity type to which they belong. You can also specify a parent to the entity based on its hierarchy.

Before you begin
Add a workplace entity type

Role required: Workplace manager

About this task
Create and associate a workplace entity with an entity type so that it can be easily classified. Assign the entity to a parent.

Procedure
1. Navigate to **All** > **Workplace Core** > **Administration** > **Workplace Entities**.
2. Select **New**.
3. On the form, fill in the fields.

Workplace Entity form

Field	Description
Name	Name of the workplace entity.
Parent	Parent of the workplace entity.
Entity type	Entity type to which the workplace entity belongs.
Active	Option to activate the workplace entity.
Managed by group	Group that manages the workplace entity. Users of the selected group receive a notification when an allocation for the entity is going to expire.
Managed by	User that manages the workplace entity. The selected user receives a notification when an allocation for the entity is going to expire.

4. Select **Submit**.

Result
The workplace entity is created and assigned to the selected parent and entity type.

What to do next
For more information about how workplace entities and other allocations work, refer to Allocation - types, setting, and impact.

To populate the Entity-mapping column for existing workplace entities, the application provides you with the following flows:

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- **Set hierarchy from scratch via subflow**: Run this flow to recalculate the entity-mapping columns for the complete hierarchy.
- **Process entity updates via subflow**: This flow runs everyday to update the workplace entity-mapping columns only for those workplace entities where the 'update_type' column is set.

Managing Neighborhoods

Neighborhoods are a group of spaces assigned to employees within an organization. A neighborhood can be located anywhere within the organizational structure.

Space admins and space planners can create a neighborhood and perform the following:

- Assign multiple neighborhoods to employees. An employee can be assigned to a space in a neighborhood or to the neighborhood itself. For more information, see Create a neighborhood for workplace users.
- Assign employees to a neighborhood using user assignment rules that can run on a schedule. For more information, see Execute User Assignment Rules.
- You can also assign a user to a neighborhood from their workplace profile directly. Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.
- Employees can reserve a space in a neighborhood if they're part of the neighborhood or if the neighborhood isn't restricted.
- Add or remove spaces in a neighborhood.
- Add or remove users from one neighborhood to another.
- View and reserve neighborhood spaces using floor maps on the reservation portal.

> **Note:** Verify that you have installed Indoor Mapping and dependent plugins to view neighborhoods on a floor map. For more information, see Configure Indoor Mapping.

Neighborhoods can be used for the following workplace requirements:

- Scenario planning. For more information, see Create a scenario.
- Reservation management: Employees can reserve neighborhood spaces using the reservation management portal. Space admins can restrict access to spaces in a neighborhood if the neighborhood is indicated as restricted or private. For more information, see Create neighborhood reservations.
- Location directory: Employees can view spaces belonging to a neighborhood on the location directory. For more information Manage workplace activities and services with Location directory.

Create a neighborhood for workplace users

Create a neighborhood and assign users to available spaces in a neighborhood. Add or remove users in bulk and allocate available neighborhood spaces to users in a department, cost center, or group.

Before you begin

> **Note:** Verify that Workplace Core is installed to set up and manage neighborhoods.

> **Important:** If you're using Workplace Space Management version1.11.1 or later, to add a user to the neighborhood, refer to Add or edit a neighborhood assignment of a workplace profile.

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Important: From Workplace Space Management version 1.11.1, the **Neighbourhood User Assignments** table is no longer available. Instead, the user assignment can be performed on a workplace profile directly using the **Workplace Profile Location Assignment** table (displayed a related list on the form) in the Workplace Core application. The **Workplace Profile Location Assignment** in the Workplace Core is now configured with additional fields such as **Profile type**, **Neighborhood**, and **Source** where all the data is saved. This table helps a space manager to perform scenario planning and save any user assignment-related changes performed on a neighborhood directly on the workplace profile.

On a neighborhood, when you configure a user assignment rule, the neighborhood assignment changes on the workplace profile are automatically saved on the user's workplace profile. On the user's workplace profile, you can check the type of assignment from the **Profile type** field.

If you're an existing customer, upon upgrading, the entities in the **Neighbourhood User assignments** table are automatically migrated to the **Workplace Profile Location Assignment** of the user's workplace profile.

Role required: sn_wsd_core.admin, sn_wsd_core.workplace_manager, sn_wsd_spcmgmt.space_planner

About this task

Procedure

1. Navigate to **All** > **Workplace Core** > **Neighborhood** > **Create New**.
   You can also create a neighborhood or update an existing neighborhood by navigating to **All** > **Workplace Core** > **Neighborhood.**
2. On the form, fill in the fields.

Neighborhood form

Field	Description
Name	Name of the neighborhood.
Active	Status of the neighborhood workplace location. The availability of a workplace location for any workplace-related activities is determined based on the status that is set. For more information, see Change the status of a workplace location.
Restricted	A private or restricted neighborhood. If an employee is assigned to the neighborhood by user assignment rule or is added manually (on-demand basis), the employee can reserve a space in the neighborhood. Otherwise, employees won't see the neighborhoods. see Location privacy settings and impact.

3. Select **Submit**.
   A neighborhood is created.

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Add a user to the neighborhood

Assign one or more users to a neighborhood. Create a workplace profile and add the user directly.

Before you begin

If you're using Workplace Space Management version 1.11.1 or later, you can also add a user to the neighborhood from their workplace profile directly. Refer to Add or edit a neighborhood assignment of a workplace profile.

Important: From Workplace Space Management version 1.11.1, the **Neighbourhood User Assignments** table is no longer available. Instead, the user assignment can be performed on a workplace profile directly using the **Workplace Profile Location Assignment** table (displayed a related list on the form) in the Workplace Core application. The **Workplace Profile Location Assignment** in the Workplace Core is now configured with additional fields such as **Profile type**, **Neighborhood**, and **Source** where all the data is saved. This table helps a space manager to perform scenario planning and save any user assignment-related changes performed on a neighborhood directly on the workplace profile.

On a neighborhood, when you configure a user assignment rule, the neighborhood assignment changes on the workplace profile are automatically saved on the user's workplace profile. On the user's workplace profile, you can know the type of assignment from the **Profile type** field.

If you're an existing customer, upon upgrading, the entities in the **Neighbourhood User assignments** table are automatically migrated to the **Workplace Profile Location Assignment** of the user's workplace profile.

Role required: sn_wsd_core.admin, sn_wsd_core.workplace_manager, sn_wsd_spcmgmt.space_planner

About this task

Edit an existing user in a neighborhood or add a user to a neighborhood.
To add a user to the neighborhood, the user must have a workplace profile. If the user doesn't have a workplace profile created, create a workplace profile and add the user using the following procedure.

Procedure

1. Navigate to **All** > **Workplace Core** > **Neighborhood** > **All**.
2. Select the neighborhood to which you want to assign a user.
3. **Optional:** If you're using Workplace Space Management version 1.10.0 or below, to add a user, do the following:

   a. On the form, select the User Assignments Related list.

   b. Select **New**.

   c. On the User Workplace Profile form, do the following:

      i. Select the **Employee** whom you want to add.

      ii. Select the **Workplace Entity** to which the employee belongs.

      iii. Select **Submit**.

      The workplace profile is created for the user and is also added to the neighborhood.

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4. **Optional:** If you're using Workplace Space Management version 1.11.1 or later, to add a user, do the following:

   a. On the form, select the Workplace Profile Location Assignment related list.

   b. Select **New**.

   c. On the Workplace Profile Location Assignment, do the following:

      i. In the **Workplace profile** field, select the user's workplace profile who you want to add.

      ii. Select the **Profile type** as **Neighbourhood assignment**.

      iii. In the **Workplace location** field, select the workplace location in the neighborhood to which you want to assign the user.

      The user is added to the neighborhood. The workplace profile of the user is updated with the neighborhood assignment. You can also make or edit the neighborhood assignment from the workplace profile. For more information, refer to Add or edit a neighborhood assignment of a workplace profile.

5. Select **Update**.

Result

The user is added to the neighborhood. The Workplace Profile Location Assignment of the user is updated. The Workplace Profile Location Assignment related list in the Workplace Profile form of the user and the Neighborhood form are updated. Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.

For more information about the Workplace Profile Location Assignment, see Workplace Profile Location Assignment form.

Add or edit a neighborhood assignment of a workplace profile

Add a user or edit a user's neighborhood assignment from their workplace profile directly.

Before you begin

Role required: sn_wsd_core.admin, sn_wsd_core.workplace_manager, sn_wsd_spcmgmt.space_planner

About this task

You can also add a user or modify a user's neighborhood assignment from their workplace profile directly instead of making changes to the neighborhood. The changes are applied on both the neighborhood and the workplace profile. You can edit a user's **Neighborhood**, neighborhood's **Workplace location**, the **Profile type** and other details.

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Workplace profiles**.
2. Select the user whose neighborhood assignment you want to add or edit.

   a. On the User Workplace Profiles list, select the Preview icon ( ) next to the **Employee** name.

   b. Select **Open Record**.

3. On the User Workplace Profile form, go to the Workplace Profile Location Assignments related list.
4. To edit the existing user assignment, do the following:

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a. Double click the field that you want to edit.

b. Select **Save**.

c. Select **Update** to update the profile.

5. To add a neighborhood assignment, do the following:

a. Select **New**.

b. On the Workplace Profile Location Assignment form, do the following:

i. Set the **Profile type** as **Neighborhood assignment**.

ii. In the **Neighborhood** field, select the neighborhood to which you want to assign the user.

iii. In the **Workplace location** field, select the workplace location in the neighborhood to which you want to assign the user.

iv. Select **Submit**.
The neighborhood assignment is updated.

6. Select **Update** to update the workplace profile.

Result

The user's neighborhood assignment and the neighborhood to which the user belongs is updated. Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.

Edit a user assignment of a neighborhood

Edit an existing user's workplace profile assigned to the neighborhood.

Before you begin

If you're using Workplace Space Management version 1.11.1 or later, you can also edit or remove a user from a neighborhood from their workplace profile directly. Refer to Add or edit a neighborhood assignment of a workplace profile.

Important: From Workplace Space Management version 1.11.1, the **Neighbourhood User Assignments** table is no longer available. Instead, the user assignment can be performed on a workplace profile directly using the **Workplace Profile Location Assignment** table (displayed a related list on the form) in the Workplace Core application. The **Workplace Profile Location Assignment** in the Workplace Core is now configured with additional fields such as **Profile type**, **Neighborhood**, and **Source** where all the data is saved. This table helps a space manager to perform scenario planning and save any user assignment-related changes performed on a neighborhood directly on the workplace profile.

On a neighborhood, when you configure a user assignment rule, the neighborhood assignment changes on the workplace profile are automatically saved on the user's workplace profile. On the user's workplace profile, you can know the type of assignment from the **Profile type** field.

If you're an existing customer, on upgrading, the entities in the **Neighbourhood User assignments** table are automatically migrated to the **Workplace Profile Location Assignment** of the user's workplace profile.

Role required: sn_wsd_core.admin, sn_wsd_core.workplace_manager, sn_wsd_spcmgmt.space_planner

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About this task

You can add only users with workplace profiles to a neighborhood. Perform the following steps to edit user assignments that have workplace profiles.

Procedure

1. Navigate to **All** > **Workplace Core** > **Neighborhood** > **All**.
2. Select the neighborhood in which you want to edit the user assignment.
3. **Optional:** If you're using Workplace Space Management version 1.10.0 or below, to edit a user, do the following:
   a. On the form, select the User Assignments Related list.
   b. Select **Edit...**.
   c. On the Edit members form, add or remove users between **Collections** and **User Assignments list**.
   d. Select **Save**.
   The user assignment is updated.
4. **Optional:** If you're using Workplace Space Management version 1.11.1 or later, to edit a user, do the following:
   a. On the form, select the Workplace Profile Location Assignment related list.
   b. Edit the details of the user directly from the list view or select the Preview icon ( ).
   Select **Open Record**.
   c. On the Workplace Profile Location Assignment form of the user, change the fields that you want to edit.
   d. Select **Update**.
   The user assignment is updated and the workplace profile of the user is updated with the changes.
5. Select **Update**.

Result

The user assignment is updated. Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.

Add or edit the workplace location of a user in the neighborhood

Add a workplace location to a user assignment or update the existing workplace location of the user assignment.

Before you begin

If you're using Workplace Space Management version 1.11.1 or later, you can also edit the workplace location of a user from their workplace profile directly. Refer to Add or edit a neighborhood assignment of a workplace profile.

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Important: From Workplace Space Management version 1.11.1, the **Neighbourhood User Assignments** table is no longer available. Instead, the user assignment can be performed on a workplace profile directly using the **Workplace Profile Location Assignment** table (displayed a related list on the form) in the Workplace Core application. The **Workplace Profile Location Assignment** in the Workplace Core is configured with additional fields such as **Profile type**, **Neighborhood**, and **Source** where all the data is saved. This table helps a space manager to perform scenario planning and save any user assignment-related changes performed on a neighborhood directly on the workplace profile.

On a neighborhood, when you configure a user assignment rule, the neighborhood assignment changes on the workplace profile are automatically saved on the user's workplace profile. On the user's workplace profile, you can know the type of assignment from the **Profile type** field.

If you're an existing customer, on upgrading, the entities in the **Neighbourhood User assignments** table are automatically migrated to the **Workplace Profile Location Assignment** of the user's workplace profile.

Role required: sn_wsd_core.admin, sn_wsd_core.workplace_manager, sn_wsd_spcmgmt.space_planner

Procedure

1. Navigate to **All** > **Workplace Core** > **Neighborhood** > **All**.
2. Select the neighborhood that you want to update.
3. **Optional:** If you're using Workplace Space Management version 1.10.0 or below, to edit a user, do the following:
   a. On the form, select the User Assignments Related list.
   b. Double-click the workplace location of the workplace profile to add or edit the location.
   c. Search and select the location.
      Note: You can only select a floor, area, or a space as the workplace location.
   d. Select **Save**.
      The workplace location of the user is updated.
4. **Optional:** If you're using Workplace Space Management version1.11.1 or later, to edit a user, do the following:
   a. On the form, select the Workplace Profile Location Assignment related list.
   b. Double-click the workplace location of the workplace profile to add or edit the location.
   c. Search and select the location.
      Note: You can only select a floor, area, or a space as the workplace location.
   d. Select **Save**.

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5. Select **Update**.
   The workplace location is updated and the workplace profile of the user is updated with the changes.

Result

The workplace location is updated for the selected workplace profile. You can also make neighborhood-related changes on the workplace profile directly. Refer to Add or edit a neighborhood assignment of a workplace profile. Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.

View neighborhoods in Workplace Core

View existing neighborhoods with assigned spaces and user allocation.

Before you begin

Role required: admin

Procedure

1. To view existing neighborhoods with assigned spaces and user allocation, navigate to **All** > **Workplace Core** > **Neighborhood** > **All**.
2. Select a neighborhood, then add spaces from a group, cost center, or department, by selecting **Assign spaces**.
3. On the form, fill in the fields.

Workplace Task form

Field	Description
Neighborhood	Neighborhood name that the spaces are assigned to.
Table	By default, the following tables are available. ○ Cost Center/Department [sn_wsd_spcmgmt_location_cc_dept_map] ○ Room [sn_wsd_core_room] ○ Room [sn_wsd_core_room]
Filter	Filter to show the number of matching records that match the conditions in the condition builder. The space planner can assign spaces in a neighborhood based on department, business unit, cost center, or group. For more information about filters, see Filter condition builder.
State	The space assignment request state moves from **Open** to **Work in progress** and then when spaces are assigned, the state moves to **closed**.

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Field	Description
Workplace task sub type	○ **Append**: Add this space to an existing list of spaces in a neighborhood. ○ **Remove all and replace**: Available spaces are removed (already available spaces on the **Spaces** tab) from a neighborhood. Add new spaces that match the filter condition builder.

4. Select **Submit**.
   The **Space Assignment Tasks** related list shows the newly assigned space.
5. To edit, select a space, change the required details, and select **Update**.
6. After making the required changes, select **Save**.
7. Assign users to spaces by selecting the **User Assignment Rules** tab.
   You can also select **All** > **Neighborhood** > **Assign Employees** to assign a workplace user to a department, group, or cost center.
8. Create a new user assignment task by selecting **New**.

   On the form, fill in the fields.

Neighborhood User Assignment Rule form

Field	Description
Name	Name of the user assignment rule.
Neighborhood	Neighborhood field. Select a neighborhood using the lookup list icon () to search for available neighborhoods.
Building	Building that the user is assigned to in a neighborhood. Only buildings that are part of a selected neighborhood can be selected.
Floor	Floors in a selected building.
Table	By default, the **sys_user** table is selected. User criteria reference various user fields (from the User [sys_user] table), such as department, cost center, and group.
Filter	Add filter conditions using the condition builder to assign users to a cost center or department. For example: **Cost center is Finance**.
Active	Option to make users active in a neighborhood.

9. Select **Submit**.
   The employee is added (auto-assigned) to a selected neighborhood. Employees belonging to an indicated hierarchy (auto-assigned), or employees that are added manually (on demand) can interact with a neighborhood.

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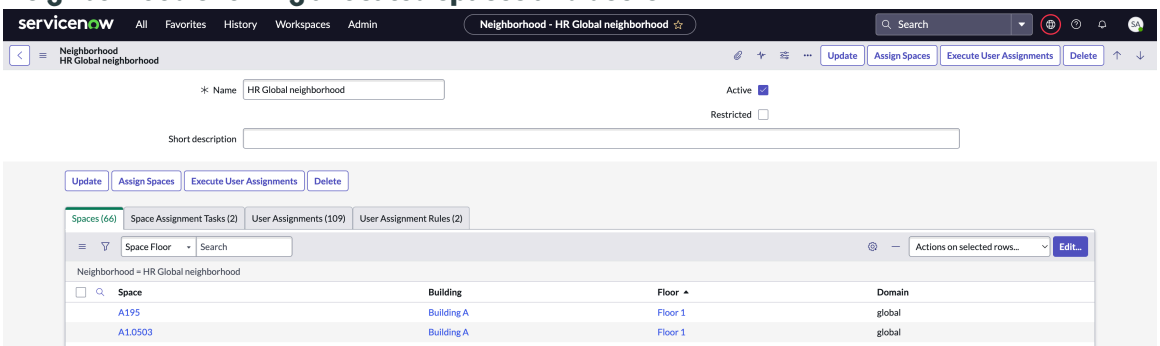
10. Select the **Execute User Assignments** tab to trigger all assignment rules (users to added or removed space allocation) to this neighborhood directly.

Neighborhood showing allocated spaces and users



Note: Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.

By default, the *`Execute User Assignment`* scheduled job runs daily or weekly on an instance. You may want to run it for the first time directly. When you run the scheduled job for each user, a workplace profile record is created (if it's not in your instance already), and the neighborhood is assigned to that workplace profile.

- When an employee is assigned to a neighborhood, a workplace profile is created.
- Neighborhoods are assigned to a workplace profile, even if an employee has multiple workplace profiles. All neighborhood assignments are done only on one workplace profile.
- An employee can be assigned to multiple neighborhoods. Each assignment is a separate record in the Workplace Profile Location Assignment Related list on the workplace profile form.
- The changes are captured in the execution details table and the changes are mentioned as type **Allocation**.
- If new spaces are assigned to a neighborhood, the spaces are updated in the neighborhood record.
- If spaces are removed from a neighborhood, the neighborhood record is updated when you run the execute user assignment task.

  Workplace Profile records are updated, added, or removed. A move task is initiated for employees who have a new space allocation and who are moved from one floor to another.

11. To create and manage a neighborhood in Workplace Central for a scenario, see Create a scenario.
12. To view and reserve spaces in a neighborhood using the Reservation Management portal, see Create neighborhood reservations.
13. **Optional:** To add a user to the neighborhood, refer to Add a user to the neighborhood.

Enable favorites option for Workplace Service Portal

Enable employees to set a workplace location as their favorite while using the Workplace Service Portal. Integrate with Employee Service Center to configure the favorites option.

Before you begin

To enable the favorites option for Workplace Service Portal, verify that you have the latest versions of the following applications and plugins installed:

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- Employee Center Core (sn_ex_sp)
- Employee Experience Taxonomy plugin (sn_ect)
- Employee Experience Foundation (sn_ex_emp_fd)

Role required: esc_admin or sn_wsd_core.admin

About this task

Configure the favorites option so that employees can set any workplace location as their favorite. The employees can view their favorite locations anytime by selecting the **Favorites** tab on the Employee Center home page. The locations that they set as their favorite are given as the first priority when they search for available locations to make a reservation.

Procedure

1. Navigate to **All** > **Favorites** > **Favorite Content Configuration**.
2. Verify that the following Content types are listed in the favorite Content Configuration form:
   - Desks (sn_wsd_core_space)
   - Rooms (sn_wsd_core_rooms)
3. Navigate to **All** > **Service Portal** > **Portals**.
4. In the Service portals list, perform the following actions:
   a. Go to **Workplace Services**.
   b. In the **Enable favorites** column, set the option to **true**.

Result

The favorites option is enabled for employees to set any workplace location as their favorite.

Create a workplace performer criteria

Configure the users who are permitted to perform important actions in Workplace Service Delivery. Add approvers to approve workplace cases and reservations that are created through Workplace services.

Before you begin

Role required: sn_wsd_core.admin

About this task

Configure workplace performer criteria and enable a set of users to perform actions such as approval and more. The configured users can perform approval actions, workplace-related activities, and reservation-related approvals. The users configured in the criteria are used to perform various important actions throughout the Workplace Service Delivery application.

Procedure

1. Navigate to **Workplace Core** > **Administration** > **Performer Criteria**.
2. Select **New**.
3. On the form, fill in the fields.

Workplace Performer Criteria form

Field	Description
Name	Name of the performer criteria.

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Field	Description
Table	Table for which you want to create the performer criteria. This field appears only if the **Is dynamic** option is selected.
User criteria	User criteria for the performer criteria for approvals. This field appears only if the **Is dynamic** option isn't selected. To add a user criteria, refer to Create a user criteria record.
Active	Option to activate the performer criteria.
Is dynamic	Option to create the performer criteria with a dynamic behavior. If you enable the option, you can select the user fields directly that you want to set as approvers.
User field	Users or user groups who perform any important Workplace Service Delivery application-related actions. This field appears only if the **Is dynamic** option is enabled.

4. Select **Submit**.

Result
The performer criteria are added for the selected table.

Create an approval definition

Add an approval definition so that you can implement an approval process that is over that definition. The approval is applied on reservations that match the conditions.

Before you begin

Important: Starting with Workplace Reservation Management version 2.1.2, the approval options function as follows:

- For existing customers, it was possible to configure approval functionality on the Reservable module to approve reservations. After the upgrade, this possibility remains the same until a new approval definition is configured using the following procedure. After you configure a new approval definition, the approval process will run based on the upgrade.

  After the upgrade, disable the **WSD Reservation Approval Flow** in the **Flow designer**.

- For new customers, the following procedure explains how to configure an approval definition to approve a reservation.

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **Workplace Core** > **Administration** > **Approval Definitions**.
2. Click **New**.
3. On the form, fill in the fields.

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Workplace Approval Definition form

Field	Description
Name	Name of the approval definition.
Applicable to	Table on which the approval definitions must be applied.
Application	Application for which you are creating the approval definition. This field is automatically set.
Active	Option to activate the approval definition.
Order	Order in which the approval definition must be implemented. For example, if you selected the Reservation table in the **Applicable to** field and there a reservation matches more than one approval definition, then the approval definition with the lowest order is applied. However, do not maintain approval definitions with the same order.
Conditions	Option to add filter conditions based on which the approval definition must be implemented. The conditions are applied on the table selected in the **Applicable to** field. To add a condition, select **Add filter condition**. To add an OR clause, select **Add "OR" clause**. For example, if the Reservation table is selected in the **Applicable to** field, then the approval definition is implemented on the reservations that match the filter conditions.

4. Click **Submit**.

Result
The approval definition is created for the reservation table. If a reservation matches more than one approval definition, then the approval definition with the lowest order is applied.

What to do next
Add approvers to approve the reservations that match the approval definition. For more information, refer to Add a workplace approval configuration.

Add a workplace approval configuration

Add approvers to an approval definition. The assigned approvers receive the approval requests of those reservations that match the conditions defined in the approval definition.

Before you begin
Role required: sn_wsd_core.admin

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Procedure

1. Navigate to **Workplace Core** > **Administration** > **Approval Definitions**.
2. Select the approval definition to which you want to add a workplace approval configuration.
3. On the form, scroll down to the Workplace Approval Configurations related list.
4. Click **New**.
5. On the form, fill in the field.

Workplace Approval Configuration form

Field	Description
Name	Name of the workplace approval configuration.
Approval definition	Definition of the approval. The field is automatically set.
Approvers	Approvers for the approval definition. Select one or more approvers to approve the reservations that match the approval definition. To add approvers, refer to Create a workplace performer criteria.
Application	Application for which you are creating the approval definition.
Wait for	Type of approval required to approve the reservation. Options are as follows: ○ Any approver can approve. ○ All approvers must approve. ○ The first response from any approver is an approval.
Missing all approvers	What action to take if all the approvers are missing.
Level	Importance level of the approval. The approval with the lowest level is implemented first.

6. Click **Submit**.

Result

The workplace approval configuration is added.

Mapping employees to their designated workspaces

Map your employees to their designated workplace locations in Workplace Core automatically to fill in that detail in reservation requests and to take advantage of auto-assignment of workspaces if that feature has been enabled.

For employees who had a designated workspace before they started working remotely, create a mapping between the user profile and the designated workspace details. This mapping populates the workspace details on reservation request forms so employees don't have to provide these details manually.

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If your system administrator has enabled the auto-assign feature, mapping workspaces for all employees also means that designated workspaces are automatically assigned when employees make a reservation request.

The data from the User Workplace Profile [sn_wsd_core_workplace_profile] table is used to automatically assign the designated workspace to the employee.

- If the user's designated space is available, this space is reserved for the employee.
- If the designated space is unavailable for the requested date or time, the application searches for and reserves an available space in the employee's workplace in the order of Area > Floor > Building > Campus > Site > Region.

  For example, if no spaces are available in the designated area of the employee, the application finds and reserves an available space from the floor of this area.

Note: From Workplace Core version 2.16.1, the workplace user profiles are created in the Workplace Profile Location Assignment [sn_wsd_core_workplace_profile_location] table. A new field **Is Primary** is added in the table so that you can specify if a location is the primary location when there are multiple locations. In case of existing user profiles created in the User Workplace Profiles [sn_wsd_core_workplace_profile] table, a fix script runs and automatically considers the latest workplace location added to the profile as the primary workplace location.

If you have installed Workplace Space Management application, as a Workplace manager, you can also view the reason for an anomaly in a workplace profile if there are any. A schedule job also enables you to view a detailed report of all the anomalies logged in the application via an email. Navigate to **Workplace Core** > **Administration** > **Workplace profiles** and switch to the Space Management view, a **Reason for anomaly** column appears as a Glide list. An anomaly can happen due to a mismatch in the allocation or assignment type. For more information about anomalies, see Workplace location assignment anomaly types.

From Workplace Space Management 1.12.0, only open spaces from the user's allocation type that are within the allocation start and end dates are listed. After an allocation expires, the anomaly is recalculated to the appropriate value.

Important: Starting from Workplace Core version 2.16.1, the allocation type **Department and cost center** are no longer available. A new allocation type, **Workplace entity** is introduced that provides more advantages.

Map designated workspaces to user profiles

Map existing designated workspaces to employee user profiles in Workplace Core. This mapping is used to automatically allocate workspaces for employees so they don't have to select a workspace manually when requesting a reservation.

Before you begin

- Ensure that your workplace administrator has completed setting up your workplace data. For more information, see Providing your workplace data.
- Ensure that you have the designated workplace information for all the employees.

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- You can also navigate to the User Workplace Profiles [sn_wsd_core_workplace_profile] table by entering `sn_wsd_core_workplace_profile.list` in the navigation filter.

  Note: From Workplace Core version 2.16.1, the workplace user profiles are created in the Workplace Profile Location Assignment [sn_wsd_core_workplace_profile_location] table. A new field **Is Primary** is added in the table so that you can specify if a location is the primary location when there are multiple locations. In case of existing user profiles created in the User Workplace Profiles [sn_wsd_core_workplace_profile] table, a fix script will run and will automatically consider the latest workplace location added to the profile as the primary workplace location.

Important: Starting from Workplace Core version 2.16.1, the allocation type **Department and cost center** is no longer available. A new allocation type, **Workplace entity** is introduced that provides more advantages.

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task

Create a mapping for all employees and their designated workplaces. You can also perform an easy import of your employee workplace data. For more information, see Easy import.

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Administration** > **Workplace profiles**.
2. Select **New**.
3. On the form, fill in the fields.

User Workplace Profile form

Field	Description
Employee	Employee for whom you want to create a workplace mapping.
Workplace entity	Workplace entity of your workplace to which the employee belongs. You can view this option only if you have installed the Workplace Space Management plugin and the view is set to **Space management** view.
Primary Workplace location	Primary or the main workplace location of the employee. The location is automatically set based on the Workplace Profile Location Assignment that is set as true. If there are no workplace locations assigned to the employee, then the field is set to read-only and empty.
Active	Option for indicating that this workplace mapping is active.
Enable employee location privacy	Option to set location privacy preference for the workplace profile. Note the following:

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Field	Description
	Note: The field will be set to read-only and **None** if there are no workplace locations assigned to the employee. Otherwise, if a primary workplace location is set, then the privacy set on the primary workplace location is considered. ○ Set this option only if you want to have a different privacy setup for the workplace profile. ○ By default, the location privacy preference that is set on the building to which the workplace profile is assigned is considered. ○ In case, the building doesn't have any location privacy preference, preference set in the Workplace Reservation Management system property *sn_wsd_core.ENABLE_LOCATION_PRIVACY* is considered. ○ The field is set to **None** by default. For more information about each field, refer to Location privacy settings and impact

4. Select **Submit**.
5. Repeat the procedure for all the employees of the workplace that you manage.

Result
The User Workplace Profiles [sn_wsd_core_workplace_profile] table is populated with all the new profiles.

Set the primary location of a workplace profile

Assign a primary location for the workplace profile if there are multiple locations assigned.

Before you begin
Note: From Workplace Core version 2.16.1, the workplace user profiles are created in the Workplace Profile Location Assignment [sn_wsd_core_workplace_profile_location] table. A new field **Is Primary** is added in the table so that you can specify if a location is the primary location when there are multiple locations. In the case of existing user profiles created in the User Workplace Profiles [sn_wsd_core_workplace_profile] table, a fix script runs and automatically considers the latest workplace location added to the profile as the primary workplace location. To set the primary location of a workplace profile, refer to Set the primary location of a workplace profile.

Role required: admin

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About this task

When there are multiple locations to which as user workplace profile is assigned, you can specify the primary workplace location. The primary workplace location is considered as the main location. The following areas are impacted when you set a primary workplace location:

- When an employee raises a workplace service request, depending on the user for whom the request is being used, the fields are automatically filled. In the case where a location is required on the form, the application automatically fills it with the specified primary location.
- When an employee searches for spaces nearby to the user's location to make a reservation, the primary location is considered.

Procedure

1. Navigate to **All** > **Workplace core** > **Administration** > **Workplace profiles**.
2. Select the **Active** field of the workplace profile that you want to modify.
   For example, select **true** in the **Active** column to open the record.
3. On the form, scroll down to the Workplace Profile Location Assignment related list.
4. Set the primary location.
   - To add a new location and then set it as primary, do the following:
     a. Select **New**.
     b. Add the location. Refer to Map designated workspaces to user profiles.
     c. Ensure that the **Is primary** field is selected.
   - To set an existing location as primary, do the following:
     a. Go to the **Is primary** field of the workplace location.
     b. Set the field to **true**.
5. Select **Update**.

Result

The primary workplace location is set. The **Primary Workplace location** field is updated with the location.

Assign the workplace user role to employees

Set rules in Workplace Core to assign the workplace user role to employees and apply conditions accordingly.

Before you begin

Ensure that the user profiles of all your employees have required details. You can review the employee user profiles by navigating to **User Administration** > **Users**.

Role required: admin or sn_wsd_core.admin

Procedure

1. Navigate to **Workplace Safety Management** > **Administration**.
2. Select **Client Role Assignment Rules**.
3. On the form, fill in the fields.

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Workplace Client Role Rule form

Field	Description
Name	Unique name for this assignment rule.
Role	This value is auto-generated with the workplace user role (sn_wsd_core.workplace_user).
Active	Option for indicating whether this assignment rule is active.
Condition	Option to add filter conditions that a user profile must match. To add a condition, select **Add filter condition**. To add a OR clause, select **Add "OR" clause**.
Table	Table on which the conditions must be built. The field is automatically selected as `sys_user`.

4. Select **Submit**.

Result
The workplace user roles are assigned. If a record is created or updated on this table, a role assignment process is triggered in the background.

Configuring shifts for your workplace

Configure shifts for your organization in the Workplace Core application so you can efficiently plan and manage your workplace by assigning employees and workspaces to those schedules.

Define shifts for your workplace

Define shifts in Workplace Core with specific schedules so you can designate areas or workplaces and assign employees for each shift.

Before you begin
- Providing your workplace data.
- Ensure you have the following information:
  - Appropriate shift schedules
  - Data of the employees who would operate from the office in this shift
  - Data of the workplaces to be made available for this shift

Important: Starting with Workplace Core (sn_wsd_core) version 2.1, all updates and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.workplace_manager

About this task
Workplace managers can later reserve workplaces for employees according to the shifts assigned to them.

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If your organization does not organize work in shifts, you can use the general shift schedule that is available with the application by default.

You can also access the Shift form by navigating to **Workplace Core** > **Shift Management** > **Create New**.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Browse Workplace Services**.
2. Select **Add a shift**.
3. On the form, fill in the fields.

Shift form

Field	Description
Name	Name of the shift, for example, Morning Shift.
Schedule	Schedule for the shift. For a general shift schedule, select **General shift**. For more information about how to create a shift schedule, see Define a schedule.
Owner	Shift owner who monitors activities during this shift.
State	Status of the shift. Choose one of the following values: ○ **Draft**: Indicates that the shift details are incomplete. ○ **Ready**: Indicates that the shift is ready for assignments. ○ **Cancelled**: Indicates that the shift is cancelled.
Start	Date from which this shift is active.
End	Date until which the shift is active.
Region	Region of the workplace site.
Site	Site location of the office campus.
Campus	Name of the campus in which the office building is present.
Building	Name of the building in which the office floor is located.
Floor	Name or number of the floor where the area is located.
Area	Area that is active for operation and use during this shift.
Users	Employees assigned to this shift.

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Field	Description
	This field appears only on Workplace Service Portal.
Locations	Workplaces available for reservation during this shift. This field appears only on Workplace Service Portal.

Note:

- If this shift is applicable to all office buildings on your campus, you can leave the **Building**, **Floor**, and **Area** fields empty. The shift and its schedule will be automatically applied to all the records of buildings, floors, and areas associated with this campus.
- When an employee requests to make a reservation with shifts, only shifts that are active on the dates that the employee selected are displayed on the reservation form.

4. Select **Submit**.
5. If you accessed the Shift form from Workplace Service Portal, on the verification page, you can define another shift or view all the existing shifts.

Option	Action
Define another shift	Select **Add another shift**.
View all existing shifts	Select **View all shifts**.

Result

The shift is added to the list of all shifts that you can view by navigating to **Workplace Safety Management** > **Shift Management** > **All**.

If you want to delete a shift, perform the following actions:

- Navigate to **Workplace Safety Management** > **Shift Management** > **All** and select the shift that you want to delete.
- On the form, click**Delete**.
- In the confirmation window, click **Delete**.

  The shift is deleted.

What to do next

If you created the shift using Workplace Service Portal, you can directly create workplace reservations.

You can configure other information such as employees, workplaces, and maintenance tasks associated with this shift later.

- Assign more employees to a shift.
- Associate more workplaces with a shift.
- Associate tasks with a shift.

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Assign employees to a shift

Associate employees with a shift in Workplace Core so that they operate from the office only in the shifts to which they are assigned. Workplace managers can later reserve workspaces for these employees according to their assigned shifts.

Before you begin

- Define shifts for your workplace.
- Ensure you have the data for the employees who will operate from the office in this shift.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Safety Management** > **Shift Management** > **All**.
2. Open a shift to which you want to add employees.
3. In the Users related list, select **Edit**.
4. Add all the employees who should operate from the office in this shift.
5. Select **Save**.

Result

A pre-configured email with the shift details is sent to all employees assigned to this shift.

What to do next

Associate areas and spaces with a shift.

Associate areas and spaces with a shift

Associate work areas and spaces with a shift in Workplace Core so that they are available only for that shift. Workplace managers can later reserve these workplaces for employees operating in that shift.

Before you begin

- Define shifts for your workplace.
- Ensure you have the data for the workplaces to be made available for this shift.
- Ensure that the glide.ui.list.allow_extended_fields system property is set to **true** so that the filter criteria is displayed appropriately when you're adding areas or spaces.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Safety Management** > **Shift Management** > **All**.
2. Open a shift to which you want to add employees.
3. In the Locations related list, select **Edit**.
4. Add all the areas and spaces to be made available for this shift.
5. Select **Save**.

What to do next

Create workplace reservations for an employee.

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Managing workplace shifts that you own

Review the workplace shifts that you own in Workplace Core and update the shift details if necessary. You can also monitor the reservations and requests made for the workspaces associated with these shifts.

Update details of the shifts that you own

Review and modify the details of the workplace shifts that you own in Workplace Core. You can modify the general shift details, and add or remove employees or workplaces associated with the shift.

Before you begin

Role required: sn_wsd_core.workplace_shift_owner

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Shift Management**.
2. Select **Owned by Me**.
3. Open the shift for which you want to view the details.
4. **Optional:** Modify the shift details.

   a. Edit the details on the shift form.

Shift form

Field	Description
Name	Name of the shift.
Schedule	Schedule for the shift. (Optional) For a general shift schedule, select **General shift**.
Owner	Shift owner who monitors activities during this shift. (Optional) If you select a different user, you will lose access to this shift.
State	Status of the shift. Choose one of the following values: ▪ **Draft**: Indicates that the shift details are incomplete. ▪ **Ready**: Indicates that the shift is ready for assignments. ▪ **Cancelled**: Indicates that the shift is cancelled.
Region	Region of the workplace site.
Site	Site location of the office campus.
Campus	Name of the campus in which the office building is present.

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Field	Description
Building	Name of the building in which the office floor is located.
Floor	Name or number of the floor where the area is located.
Area	Area that is active for operation and use during this shift.

Note: If this shift is applicable to all office buildings on your campus, you can leave the **Building**, **Floor**, and **Area** fields empty. The shift and its schedule will be automatically applied to all the records of buildings, floors, and areas associated with this campus.

b. Select **Update**.

5. **Optional:** Modify the list of employees assigned to this shift.
   a. In the Users related list, select **Edit**.
   b. Add or remove users.
6. **Optional:** Modify the list of workspaces associated with this shift.
   a. In the Locations related list, select **Edit**.
   b. Add or remove areas and spaces.

Review workplace reservations for shifts that you own

Review the workplace reservations and the reservation requests made for the shifts that you own in Workplace Core. You can identify pending requests and work with your workplace manager to resolve them.

Before you begin

Role required: sn_wsd_core.workplace_shift_owner

Procedure

1. Navigate to the reservation requests from employees or workplace reservations by the workplace manager.

Choice	Navigation
Reservation requests made by employees	Navigate to **Workplace Safety Management** > **Workplace Requests** > **All**
Reservations made by the workplace manager	Navigate to **Workplace Safety Management** > **Space Reservations** > **All Reservations**

2. Review all reservations requested or made for your shift.
3. **Optional:** Open a reservation record to view its details.

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(Optional) If you want to make any changes to the reservation such as assigning another workspace to the employee, or changing the date of the reservation, reach out to the workplace manager to request those changes.

4. **Optional:** If you are viewing employee requests, note any requests in the **Pending** state so you can work with your workplace manager to resolve them.

Managing workplace reservations for employees

Reserve available areas or spaces for your employees and review pending reservation requests from employees in Workplace Core so you can verify physical distancing measures when they return to the workplace. Once you make reservations, employees are notified about the locations to which they have access. The Workplace Service Delivery also offers more advanced workplace reservation options in the Workplace Reservation Management application.

Creating workplace reservations for employees

Reserving workplace areas

As a workplace manager, you can make reservations for employees for areas on the floors of your office buildings. When employees return to the office, they can work from any of the spaces from the reserved area. The number of employee reservations that you can make for an area of your workplace depend on the capacity defined for that area. If the **Capacity** field of an area is set to **0** or left empty, reservations cannot be made for that area.

Creating a single space reservation

Using the shifts that you defined, you can create a space reservation for an employee for a single day or multiple days.

Creating space reservations in bulk

You can generate in one action reservations for multiple employees who are assigned to a shift for a specific date range. For example, you can use this feature to create reservations for employees of a specific department who would all be assigned to the same shift.

Child reservation records for employee space reservations

When you reserve a workplace for an employee, the reservation generates child reservation records for every applicable working day of the specified period. The applicable days are determined by the shift schedule that you select for this reservation. The reservation that you initially created acts as the parent reservation record.

If a child reservation conflicts with an existing reservation for any day in the specified period, the child reservation is not created for that day. You can manually create a reservation for a different workplace for that day.

For example, say you created a reservation for the workplace 2CN1612 for Mark Andrews in the afternoon shift from 06-01-2020 to 06-10-2020. Eight child reservation records for Mark Andrews for the workplace 2CN1612 would be created for each working day between 06-01-2020 and 06-10-2020. However, if a reservation for 2CN1612 on 06-08-2020 exists for another employee Jane Doe, the child reservation for Mark Andrews on 06-08-2020 is not created. You can manually create a reservation for Mark Andrews for a different workplace for 06-08-2020.

If you update the details of a parent reservation later, all its child reservations except the ones with dates in the past are updated accordingly.

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Working with space reservation requests from employees

After an employee requests a workplace for a given date range and the manager approves the request, the application checks the availability of the requested space. If the workplace is unavailable for any or all days of the specified period, the request moves to the Pending state. As a workplace manager, you can review these pending reservation requests and allocate a different workplace to the employee to complete the request.

Define the capacity of workplace areas

Set the capacity for areas of your workplace in Workplace Core to enable reservations for the area. The capacity ensures a limit to the workplace reservations for these areas so you can ensure safety guidelines.

Before you begin

- Add your workplace data.
- Ensure you have the details of the maximum capacity for the areas of your workplace.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Space Administration** > **Areas**.
2. Open an area to which you want to add the capacity.
3. On the Area form, enter a value for the **Capacity** field.
   For example, if this area can accommodate only 8 people safely according to physical distancing guidelines, set the value to 8.
4. Select **Update**.

Create workplace reservations for an employee

Create workplace reservations for an employee in the Workplace Core application using the shifts and shift schedules that you defined.

Before you begin

- Define shifts for your workplace.
- Assign employees to a shift.
- Associate areas and spaces with a shift.
- Define the capacity of workplace areas
- Ensure you have the data that shows the mapping of employees to the workplaces in your workplace.

Important: Starting with Workplace Core (sn_wsd_core) version 2.1, all updates and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.workplace_manager

About this task

Reserve a workplace for an employee according to the assigned shift for a single day or multiple days.

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You can also access the Reservation form by navigating to **Workplace Core** > **Space Reservations** > **Create New**.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Browse Workplace Services**.
2. Scroll and select **Reserve a space**.
3. On the form, fill in the fields.

Reservation form

Field	Description
Shift	Shift for which this reservation is being made.
Location	Area or space for which this reservation is being made.
Requested for	Employee for whom this reservation is being made.
Start date	Date and time from which the reservation is active.
End date	Date and time until which the reservation remains active.

4. Select **Submit**.
5. If you accessed the Reservation form from Workplace Service Portal, on the verification page, you can create another reservation or view all the existing reservations.

Option	Action
Create another workplace reservation	Select **Reserve another space**.
View existing workplace reservations	Select **View all reservations**.

Result

- If you've reserved a space, then child reservation records are generated for every applicable occurrence of the specified period.
- A preconfigured email with the reservation details is sent to the shift owner and the employee for whom you reserved the workplace.
- The reservation is added to the list of all reservations that you can view by navigating to **Workplace Core** > **Space Reservations** > **All Reservations**.

Create workplace reservations for multiple employees

Automatically generate workplace reservations in bulk for all employees assigned to a shift for a single day or multiple days.

Before you begin

- Define shifts for your workplace.
- Assign employees to a shift.

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- Associate areas and spaces with a shift.
- Ensure that the number of locations associated with the shift is greater than the number of employees assigned to the shift.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Safety Management** > **Shift Management** > **All**.
2. Open a shift for which you want to generate the bulk reservations.
3. Select **Generate Bulk Reservation**.
4. Select a date range from the **Start date** and **End date** fields.
   If you want to create the bulk reservation for a single day, you can set the start and end date to the same day. Otherwise, set a date range.
5. Select **OK**.

Result

Reservations for the employees in this shift are created for the locations associated with the shift for the provided dates. You can view these reservations by navigating to **Workplace Safety Management** > **Space Reservations** > **All Reservations**.

Review pending workspace reservation requests

Review pending workplace reservation requests from employees in Workplace Core and assign available workplaces to complete these requests.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Workplace Requests** > **Pending**.
2. Open a pending request that you want to address.
3. Open the related reservation record, which is the parent reservation:
   a. Select the information (ⓘ) icon next to the **Reservation** field.
   b. Select **Open Record** for the desired request.
4. On the reservation form, review the reservation details such as the workplace location being requested, the start and end dates, and the number of reservations confirmed for that period. From these details, you can review the number of days, with their dates, that are missing a reservation for the employee for the requested location.
5. If any dates are missing a reservation for the requested location, adjust the pending request to assign a workplace for all the missing desired dates.
   - Change the workplace location in the parent reservation to a workplace available for all dates, which will also update the location for all applicable future child reservations.
     a. Select a different location from the **Workplace location** field.
     b. Select **Update**.
   - Create a child reservation for a new workplace location for this employee for specific dates that are missing a reservation.

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a. In the Reservations related list, select **New**.

b. Select the start and end dates in the **Start** and **End** fields.

c. Select a location from the **Workplace location** field.

The list of spaces displays the locations that are available for the requested dates.

d. Select **Submit**.

6. After all the days that were missing a reservation are addressed, update the status of the pending workplace task to **Closed complete**.
7. **Optional:** Repeat this process for all pending workplace requests that you want to address.

Result

Once the status of workplace request is updated to **Closed complete**, the reservation information is populated in the **Notes** field of the workplace request.

Setting and tracking arrivals at the workplace

Workplace managers can set arrival intervals in Workplace Core for different locations at your workplace with defined capacities to facilitate staggered entry of employees into the office. Employees can then choose from the defined arrival slots.

Workplace managers can define arrival times and capacity for different locations such as the entry and exit gates, elevator, gym, and cafeteria of your workplace. Employees can then schedule their arrival at these locations for an available time slot.

For example, say you define arrival times for the cafeteria at 12:00 h, 13:00 h, 14:00 h, and 15:00 h, and set a capacity of 15 for every slot. A maximum of 15 employees can schedule their arrival to the cafeteria for each of these times on any given day.

By setting arrival intervals for your workplace, you can facilitate employee actions such as entry and exit to the office, elevator use, lunch pickup, gym use, and so on, without employees having to wait in long lines or causing large gatherings at any of the locations.

Important: Starting with Workplace Core version 2.3, time zones are introduced in the application. All the arrival schedules that were created on Workplace Core version 2.2 and earlier are deactivated after the upgrade.

Define arrival schedules at the workplace for employees

Define arrival slot times in Workplace Core for different locations at your workplace and indicate the capacity for each slot. Establishing arrival schedules enables safe staggered entry of employees to these locations.

Before you begin

- Add your workplace data.
- Ensure you have the data for arrival schedules of the locations of your workplace.
- Ensure that your time zone is set to the time zone of the building that is used for the arrival.

Important: Starting with Workplace Core version 2.3, time zones are introduced in the application. All the arrival schedules that were created on Workplace Core version 2.2 and earlier are deactivated after the upgrade. Both existing customers and new customers must perform the following actions on existing arrival schedules to set them to active:

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1. Set the time zone of the building where you are creating or updating the arrival schedule.

   Note: If you are creating or updating the arrival schedule for a floor, area or a space, then select the building where it is located.

   a. Go to **Workplace Safety Management** > **Space Administration**.
   b. Select **Buildings**, **Floors**, **Areas**, or **Spaces** based on where you are scheduling an arrival slot.
   c. Select the building, floor, area, or the space for which you want to set the time zone.
   d. Set the building time zone.
      - If you selected a building, set the time zone in the **Time zone** field.
      - If you selected a floor, area, or the space, on the form, select the preview icon () that is next to the **Building** field.
        - In dialog box, select **Open record**.
        - On the Buildings form, set the time zone in the **Time zone** field.
   e. Select **Update**.

      Note: All the active arrival schedules that were created on this building and on associated floors, areas, or spaces will be deactivated. Any future arrival requests that are related to this schedule will be canceled.

   f. Select **Ok** on the warning that appears.
2. Change your session's time zone to the building's time zone.

   Note: Ensure that the sn_wsd_core.workplace_manager role is included in the **glide.timezone_changer.roles** property. If it is not included, ask your system administrator to include the role so that you can change your time zone.

   a. Select the settings icon () on your instance header.
   b. Set the **Time zone** field to the time zone of the building where you are creating or updating the arrival schedule.

Role required: sn_wsd_core.workplace_manager

About this task

Procedure

1. Navigate to **Workplace Safety Management** > **Workplace Arrival Scheduling**.
2. Select **Create Arrival Schedules**.
3. On the form, fill in the fields.

Arrival Schedule form

Field	Description
Workplace location	Select a building, floor, area or space where you want to schedule the arrival times.

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Field	Description
Arrival schedule time	Time (in hours, minutes, and seconds) at which employee arrivals can start at this location, for example, 12 30 00.
Active	Option for indicating whether this schedule time is active. If marked as active, this schedule time will appear every day in the list of available time slots.
Capacity	Maximum number of employees that can schedule their arrival to this location at this slot time.

4. Select **Submit**.

Result

An arrival schedule is created for this workplace location for the indicated time and capacity. You can view arrival schedules by navigating to **Workplace Safety Management** > **Workplace Arrival Scheduling** > **Arrival Schedules**.

Update arrival schedules at the workplace

Define building time zones, change the capacity of an arrival schedule, and set the schedule to active or inactive.

Before you begin

- Add your workplace data.
- Ensure that you have the data for the arrival schedules of your workplace locations.

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- Ensure that your time zone is set to the time zone of the building that is used for the arrival.

Important: Starting with Workplace Core version 2.3, time zones are introduced in the application. All the arrival schedules that were created on Workplace Core version 2.2 and earlier are deactivated after the upgrade. Both existing customers and new customers must perform the following actions on existing arrival schedules to set them to active:

1. Set the time zone of the building where you are creating or updating the arrival schedule.

   Note: If you are creating or updating the arrival schedule for a floor, area or a space, then select the building where it is located.

   a. If you are updating the arrival schedule, do the following:

      i. Select the workplace location info icon ( ) that is next to the **Workplace location** field.

      ii. In the dialog box, select **Open record**.

      iii. If the value of **Workplace location** is a floor, area or a space, then select the workplace location info icon ( ) that is next to the **Building** field.

   b. On the Buildings form, set the time zone in the **Time zone** field.

   c. Select **Update**.

      Note: All the active arrival schedules that were created on this building and on associated floors, areas, or spaces will be deactivated. Any future arrival requests that are related to this schedule will be canceled.

   d. Select **Ok** on the warning that appears.

2. Change your session's time zone to the building's time zone.

   Note: Ensure that the sn_wsd_core.workplace_manager role is included in the **glide.timezone_changer.roles** property. If it is not included, ask your system administrator to include the role so that you can change your time zone.

   a. Select the settings icon ( ) on your instance header.

   b. Set the **Time zone** field to the time zone of the building where you are creating or updating the arrival schedule.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Workplace Arrival Scheduling**.
2. Select **Arrival Schedules**.
3. Select the arrival schedule that you want to update.

   Note: You cannot update the **Workplace location** or **Arrival schedule time** fields of an arrival schedule if there are any arrival requests associated with it. You must create a new arrival schedule for the changed **Workplace location** or **Arrival schedule time** fields.

4. To activate the schedule, select the **Active** option.

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5. To change the capacity, edit the **Capacity** field.
6. Select **Update**.

Result
The arrival schedule is updated.

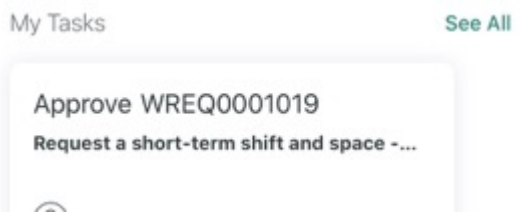
Approve employee workplace reservation requests

Review employee area and space reservation requests in Workplace Core and approve or reject them.

Before you begin
To approve or reject a workplace request using your mobile device, you must have the Now® Mobile app.

Role required: approver_user

Procedure
1. Navigate to a reservation approval task.

Application	Action
Now Mobile	In the Now Mobile app, open a task from the My Tasks section. 

2. **Optional:** Review the details of the request.
3. Approve or reject the request by selecting **Approve** or **Reject**.

Managing workplace tasks

Using workplace tasks in Workplace Core, workplace managers can monitor workplace activities that are created and scheduled in the workplace for each shift. They can also schedule planned or on-demand maintenance tasks and generate reports to track the progress of these activities.

Workplace task creation

You can create workplace tasks in the Workplace Core application for various situations.

Automatically created pre-cleaning and post-cleaning tasks

Workplace managers can create shifts and associate employees and spaces to the shift. After workspaces are assigned to a shift and the shift's state is set to Ready, the system automatically creates pre-cleaning and post-cleaning tasks for that shift. These tasks are generated using the respective templates available with the application.

Note: If a shift doesn't have a space associated to it, pre-cleaning and post-cleaning tasks are not auto-generated for it.

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Planned tasks

Tasks for recurring planned activities that are independent of shifts.

Ad hoc tasks

Ad hoc tasks when on-demand cleaning is required.

Task assignment

Assignments for tasks depend on the task type:

- Pre-cleaning and post-cleaning tasks are automatically assigned based on their templates.
- Planned tasks are automatically assigned based on the planned task definition that is used to generate these tasks.
- Ad hoc tasks can be assigned manually by workplace managers when they create these tasks.

Signature of completion

For audit and compliance of workplace activities, workplace managers can electronically sign the completed workplace tasks. This action generates a PDF of the signed form and attaches it to the task.

Configure a workplace task template

Configure templates in Workplace Core that can be used to create workplace tasks. You can either modify predefined workplace task templates or create your own templates and associate them with workplace tasks.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task

Templates simplify the process of creating tasks in Workplace Core by populating fields automatically. The following predefined templates are available with the application:

- Pre-cleaning
- Post-cleaning

Procedure

1. Navigate to **All** > *Workplace Core* > **Workplace Tasks** > **Workplace Task Templates**.
2. Create a new template or modify an existing template.
   - If you are creating a new template, select **New**.
   - If you are modifying an existing template, open the desired template.

   For information about the template form fields, see Create a template.
3. Select the **Workplace Task [sn_wsd_core_workplace_task]** table in the **Table** field.
4. **Optional:** Apply the template to the required workplace task type.
   a. In the **Template** section, select the **Workplace task type** field in the left column.
   b. Select the required task type in the right column.
5. Select **Submit**.
6. Add a checklist to the template.

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For steps on how to add a checklist, see Create a workplace task checklist.

7. Select **Update**.

Create a workplace task checklist

You can create a unique checklist for each workplace task template in Workplace Core. You can also quickly create a checklist from an existing checklist template.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task

Ensure that you have the following:

- A workplace task template already created in the application, if you are adding a checklist for a workplace task template.
- A workplace task already created in the application, if you are adding a checklist for a workplace task.

You can also create checklists for individual workplace task records.

Procedure

1. Create a checklist to be included in all tasks using the same template or add a checklist to a specific task.

Option	Steps
Checklist for workplace task template	**a.** Navigate to **Workplace Safety Management** > **Workplace Tasks** > **Workplace Task Templates**. **b.** In the list, select to open the template to which you want to add the checklist.
Checklist in a specific workplace task	**a.** Navigate to **Workplace Safety Management** > **Workplace Tasks**. **b.** In the list, select the task to which you want to add the checklist.

2. In the **Checklist** section, select the down arrow ( ) beside the **Checklist** formatter.
3. Add a checklist.
   - If you are creating a new checklist, select **Create new**.
   - If you are using an existing checklist template, select **Create from template** and select a template.
4. Add a checklist item.
   a. Select the Add item icon ( ) and enter text for the checklist item.
   b. Press Enter to add the checklist item.
   Add as many additional checklist items as desired.
5. **Optional:** Delete unwanted checklist items by selecting the delete item icon ( ).

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6. **Optional:** Change the order of checklist items by selecting the drag icon ( ) and dragging the item to a different position in the list.
7. Select **Update**.

Result

- If you created the checklist for a workplace task template, any task created using this workplace template will also contain this checklist.
- If you created the checklist in a workplace task form, the checklist will be part of only that task.

What to do next

You can save the checklist as a template for easy reuse, if required.

Save a workplace task checklist as a template

You can save a Workplace Core workplace task checklist as a template for easy reuse. A template saves time by adding checklist items automatically in a record where you use it.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task

When you add a template checklist to a record, you can add, edit, or remove checklist items in the record without affecting the template.

Procedure

1. Navigate to the record that contains a checklist you created.
   To find out how to access the record, see Create a workplace task checklist.
2. In the **Checklist** section, select the down arrow ( ) beside the **Checklist** formatter.
3. Select **Save as Template**.
4. Enter a name for the checklist template.
5. From the **User Group** list, select a group to limit who can use the checklist template.

   Only members of the selected group and the user who created the checklist can use the checklist as a template. Leaving this field blank prevents anyone but the template creator from using the checklist template.
6. Select **Save**.

Configure a workplace task signing template

Configure a signing template that you want to make available for signing the completed Workplace Core workplace tasks. You can configure the default signing template available with the application or create a new template.

Before you begin

Role required: sn_wsd_core.admin

About this task

When a workplace manager signs a completed task, an e-signature PDF document is generated using a signing template and is attached to the task. For information about signing a workplace task, see Sign a completed workplace task.

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Procedure

1. Navigate to **All** > *Workplace Core* > **Administration** > **HTML templates**.
2. Select **New** or open an existing signing template to edit it.
   The application provides a default template called **Task Signing Template**.
3. On the form, fill in or modify the fields.

Html Template form

Field	Description
Acknowledgment text	Text clarifying the meaning of the signature. For example, "I acknowledge that this information is true".
Name	Name of the signing template.
Table	Table associated with the template. The selected table determines the available variables in the **Select variables** field.
Body	Placeholder for HTML text and variables. The variables are resolved when the PDF is generated. You can select fields from the **Select variables** option to add them as variables to the HTML body.

4. Customize the body of the signing template in the **Body** field.

   a. Enter and format the text to design the body of the template.

   Use the formatting tools to apply formatting options, such as bold, italic, underline, or font styling.

   b. Insert variables by locating your cursor at the desired location and selecting the variable under **Fields**.

   For example, to indicate which location to clean, you might insert the text `Cleaning finished for the Workplace location:` and, after a space, select **Workplace location** under **Select variables**. The variable in the **Body** field text would appear as follows:

   ```
   Cleaning finished for the Workplace location:
    ${workplace_location}
   ```

   The variable is replaced with the actual location when the PDF is generated.

5. At the desired location in the **Body** field, enter the following variables:
   - `${Checklist}`: Adds the checklist variable.
   - `${Signature}`: Adds the signature variable.

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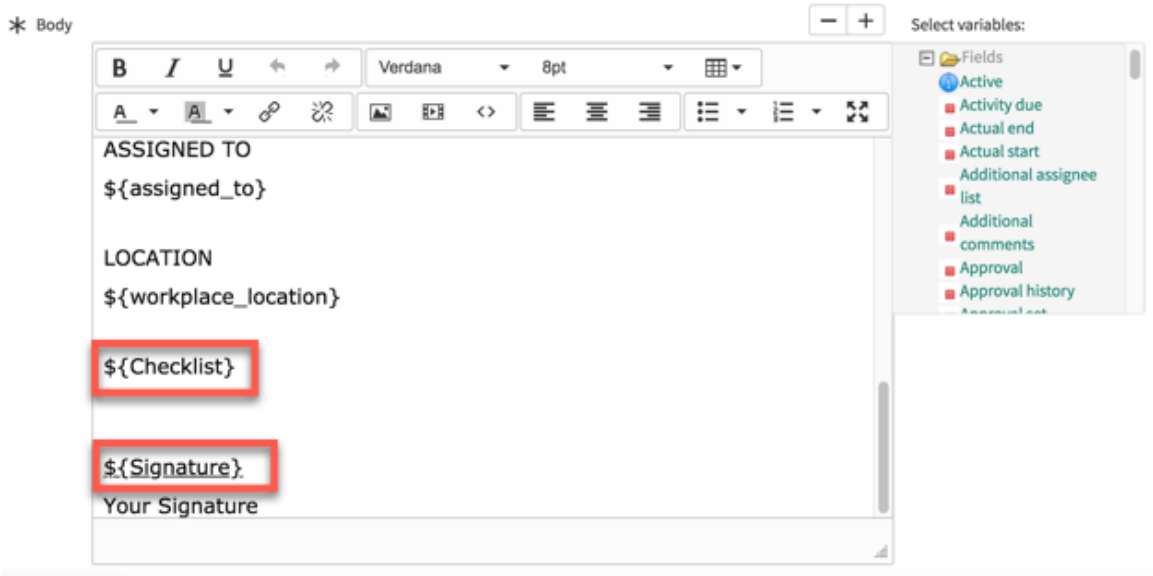

In the signed PDF document, the signature and checklist are embedded at the same location where you entered these variables into the template body.

6. Select **Submit**.
7. **Optional:** Review the look of the PDF document by impersonating a workplace manager and signing a closed task.

Create planned task definitions

Create planned task definitions in Workplace Core to help workplace managers easily generate tasks that are often repeated and independent of shifts such as cleaning coffee vending machines or cleaning floors. You can quickly specify the task details and the frequency at which the task is to be performed.

Before you begin

Important: Starting with Workplace Core (sn_wsd_core) version 2.1, all updates and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace services** > **Browse Workplace Services**.
2. Select **Add planned task definition**.
3. On the form, fill in the fields.

Planned task definition form

Field	Description
Name	Name of the planned task definition.

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Field	Description
	For example, "Clean conference rooms" for the activity of sanitizing conference rooms.
Schedule	Work schedule to be used for planned tasks.
Workplace task template	Template used for the generated planned tasks. Selecting a template automatically populates certain fields such as **Assigned to**, **Short description**, and **Workplace task type** in the generated tasks. For information about workplace task templates, see Configure a workplace task template.
Processing Time (hours)	Amount of time it should take to complete a planned task.
Planned end time	Date and time by which the task should be finished.
Planned start time	Date and time when the task should start.

4. Select **Submit**.
5. If you accessed the form from Workplace Service Portal, on the verification page, you can create another planned task definition or generate planned tasks from this definition immediately.

   Note: You can also use this definition to generate planned tasks later. See the instructions in the Generate planned tasks topic.

Option	Action
Create another planned task definition	Select **Add another task definition**.
Generate planned tasks immediately	**a.** Select **View all task definitions**. **b.** Open the planned task definition and select **Generate Task**. **c.** Select the **Workplace Tasks** related list to view the generated planned tasks.

Result

- The planned task definition is added to the list of all planned task definitions that you can view by navigating to **Workplace Core** > **Workplace Tasks** > **Planned Tasks Definitions**.
- If you created planned tasks from this definition, they are added to the list of all planned tasks. You can view those tasks by navigating to **Workplace Safety Management** > **Workplace Tasks** > **Planned Tasks**.

Generate planned workplace tasks

Using planned task definitions in Workplace Core to create planned tasks independent of shifts for recurring activities. For example, you can generate tasks for a selected number of days for cleaning all floors and buildings at midnight every day.

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Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task

Procedure
1. Navigate to **All** > **Workplace Core** > **Workplace Tasks** > **Planned Tasks Definitions**.
2. In the list, open the planned task definition.
   You can also generate planned tasks immediately when you create a new planned task definition.
3. Select **Planned start time** and **Planned end time** values based on the days and time when you need these tasks to be performed.
4. Select **Generate Task**.

Result
- Based on the planned start time and planned end time, planned tasks are created for all occurrences of the schedule and appear in the **Workplace Tasks** related list.
- The **Expected start time** in each generated planned task is auto-calculated from the planned end time and processing time values in the respective tasks as follows:

```
Planned start time = Planned end time – Processing Time
```

You can view all planned tasks by navigating to **Workplace Core** > **Workplace Tasks** > **Planned Tasks**.

Create an ad hoc workplace task

Create an ad hoc task in Workplace Core for unplanned activities. For example, if you notice that something isn't clean in an area or want the area to be cleaned again, you can create an ad hoc workplace task to get the cleaning done immediately.

Before you begin
Important: Starting with Workplace Core (sn_wsd_core) version 2.1, all updates and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

About this task
You can also access the workplace task form by navigating to **Workplace Core** > **Workplace Tasks** > **Create New**.

Procedure
1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace services** > **Browse Workplace Services**.
2. Select **Add a task**.
3. On the form, fill in the fields.

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Workplace Task form

Field		Description
Workplace task type		Type of the workplace task. Select **Ad-hoc Task**.
Workplace location		Workplace location where the task should be performed.
Signature template		Task signature template to use for signing off on this task when it is completed. For more information, see Sign a completed workplace task.
State		State of the task.
Assignment group		User group assigned to the task.
Assigned to		User assigned to the task.
Vendor		Vendor whose employees should perform the task.
Short description		Brief description of the ad hoc task.

4. Select **Submit**.
5. If you accessed the form from Workplace Service Portal, on the verification page, you can create another task or view this task record in a list.

Option	Action
Create another task	Select **Add another task**.
View the task record in a list	Select **View all tasks**.

6. Add a checklist to the task to track the actions required to complete it.
   To add the checklist, open the task by navigating to **Workplace Core** > **Workplace Tasks** > **All**.
   For more information, see Create a workplace task checklist.

Result

The ad hoc task is added to the list of all tasks that you can view by navigating to **Workplace Core** > **Workplace Tasks** > **All**.

Sign a completed workplace task

As the workplace manager for a space, sign the workplace tasks Workplace Core for complete and closed activities. Signing a task generates a PDF document for the workplace activity, which is useful for compliance procedures.

Before you begin

Role required: sn_wsd_core.workplace_manager

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Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Workplace Tasks** > **Closed**.
2. In the list, select to open the workplace task that you want to sign.
3. In the **Sign template** field, review the signing template selected for the task.
   For more information, see Configure a workplace task signing template.
4. Select **Sign Task**.

   Note: The **Sign Task** button appears only once you have selected a template in the **Sign template** field.

5. In the **Sign Task** form, sign the form in one of the following ways:
   - In the **Type signature** tab, enter your name in the **Full name** field.
   - In the **Draw signature** tab, draw your signature using your mouse.
6. Select **Accept and complete**.

Result

A PDF document of the signed form is generated based on the signing template associated with the task and is attached to the task.

Print workplace tasks

Workplace coordinators can print the workplace task details and the associated workplace activities that are created and scheduled in the workplace for each shift. The task reports contain reservation details, description, services, and all other relevant information for effective task management and resolution.

Before you begin

Role required: sn_wsd_core.task_reader

Note: Enable the Print task feature by installing the Document Templates plugin.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace Tasks**.
2. To view all the workplace tasks, select **All**.
3. Select any workplace task to view the details.
4. Select **Print task**.
   The downloaded document displays the workplace task and the associated service details.

   Note: The Print task button is visible to the sn_wsd_case.case_reader role only.

Manage print tasks

Filter workplace tasks using criteria such as Short Description, Workplace Location, or other relevant fields to generate a consolidated report using the Workplace Central Case management workspace.

Use one of the following options to proceed:

- Print Filter Selection – Apply filters and select this option to automatically create a new workplace task with the consolidated report attached.
- Print Selected Records – Manually select one or more workplace cases and choose this option to view the consolidated report directly.

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Print filtered tasks

Use filter criteria to filter multiple workplace tasks and generate a consolidated report based on the filtered tasks. You can set the condition based on the Short description, workplace location, or any other fields. When you run the filter and select Print filter selection, a new workplace task is created with the consolidated report as an attachment.

Before you begin
Role required: sn_wsd_core.task_reader

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace Tasks** > **All**.
2. Select the filter icon and set the filter criteria.
   The results appear based on the filtered condition.
3. Select **Print filter selection**.
   The attached document contains the filtered task details.

Print selected tasks

Print a consolidated report, including task details and associated services, by selecting one or more workplace tasks.

Before you begin
Role required: sn_wsd_core.task_reader

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace Tasks** > **All**.
2. Select one or more workplace tasks.
3. Select **Print selected records**.
4. Download and view the consolidated report in the Workplace Task.
   Select **Print Task** to view the workplace task report.

Apply the archive rule

Apply the archival policy for Workplace Core to archive old table records.

Before you begin
Role required: admin

About this task
The archival policy archives old table records to improve performance and restrict table size growth.

Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. Filter out the Workplace Core archive rules.
   The following Workplace Core archive rules are displayed:

   - WSD: Archive old workplace tasks: Archives old Workplace Core workplace tasks.
   - WSD: Archive old reservations: Archives old core reservation records.
   - WSD: Archive blocked location records: Archives old blocked location records.
3. Select any of the archival records listed in step 3 to edit them.

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For example: Select the **WSD: Archive old workplace tasks** to open it in edit mode.

Primary workplace tasks table, sn_wsd_core_workplace_task in Workplace Core records that are more than one year old are archived.

4. Select the **Active** option to activate the archival policy for a selected archival rule.
5. Apply the required filter conditions.
6. Select **Recalculate Estimate** to see the records eligible for archiving.
7. Select the **Run Archive Now** related link to run the archival rule.

Note: The child tables in the following applications are also archived when this archive policy is run:

- Workplace Case Management: Components installed with Workplace Case Management
- Workplace Reservation Management: Components installed with Workplace Reservation Management
- Workplace Calendar Synchronization: Components installed with Workplace Calendar Synchronization
- Workplace Move Management: Components installed with Workplace Move Management

Workplace knowledge management

As a workplace admin, you can create knowledge base articles for employees. In the articles, provide information to your employees about workplace services, such as workplace updates, self-help, troubleshoot, and others.

With the Workplace Service Delivery application, you can create knowledge base articles and display them as wiki pages or HTML pages. The Workplace Service Delivery Knowledge Management is the same as the ServiceNow AI Platform Knowledge Management, for more information, see Configuring Knowledge Management.

You can perform the following actions on a knowledge base article:

- Publish the article to make it available to employees.
- Update the article at any time if necessary.
- Retire the article if it is no longer required.
- Republish a retired article if necessary.
- Delete an article.

A knowledge base article undergoes the following workflow when it is created:

- Draft
- Review
- Published
- Pending retirement
- Retired

You can add attachments and enable employees to view the attachments individually. If a knowledge base article is relevant only for a short duration, you can specify an end date for the knowledge base article.

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You can view and update the knowledge base articles at any time. You can view published articles, unpublished articles and retired articles separately. You can also republish an article whenever needed.

Create a workplace knowledge base article

Provide information to employees through knowledge base articles. Create knowledge base articles with information about workplace updates, self-help, troubleshoot steps, and others.

Before you begin

Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

About this task

Create a knowledge base article to notify or provide employees with any important information that they must know. After you create a knowledge base article, publish the article to make it available to the employees.

You can perform the following actions on a knowledge base article:

- Publish the article to make it available to employees.
- Update the article at any time if necessary.
- Retire the article if it is no longer required.
- Republish a retired article if necessary.
- Delete an article.

A knowledge base article undergoes the following workflow when it is created:

- Draft
- Review
- Published
- Pending retirement
- Retired

Procedure

1. Navigate to **All** > **Workplace Core** > **Knowledge management** > **Create new article**.
2. Select **New**.
3. On the form, fill in the fields.

Knowledge form

Field	Description
Knowledge base	Name of the knowledge base. Select the **Workplace services** knowledge base.
Category	Relevant category for the knowledge base article. Select an existing category, or select the add category icon (⊕) to add a new category. You can also select or add a subcategory.

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Field	Description
Valid to	Date until which the knowledge base article is valid. The date is automatically set to 2100 - 01 - 01.
Article type	Type of article, which you want to create. Choices are as follows: ○ Select **Wiki** to create a wiki page. ○ Select **HTML** to create an html web page.
Workflow	This field is automatically set as **Draft**. Depending on the progress, the workflow of the knowledge base article changes to the following states: ○ Review ○ Published ○ Pending retirement ○ Retired
Attachment link	Option to give an attachment for the knowledge base article.
Display attachments	Option to display the attachments individually.
Short description	Short description for the knowledge base article. The short description is displayed as the title of the article.
Article body	Information that is displayed in the knowledge base article. Use the formatting options to change the style of the content. This field appears only if **HTML** is selected from the **Article type** field.
Wiki	Information that is displayed in the knowledge base article as a wiki. Select the **Wikitext** option to preview the text. This field appears if **Wiki** is selected from the **Article type** field.

4. **Optional:** To search existing articles for any duplicate content, select **Search for Duplicates**.
5. Select **Submit**.

Result
The knowledge base article is created.

What to do next
Publish the knowledge base article. For more information, see Publish a workplace knowledge base article.

Publish a workplace knowledge base article

After creating a knowledge base article, publish the article to make it available for employees.

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Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

Before you publish, create a knowledge base article. For more information, see Create a workplace knowledge base article.

Procedure
1. Navigate to **All** > **Workplace Core** > **Knowledge management** > **Unpublished articles**.
2. Select the knowledge base article that you want to publish.
3. On the knowledge form, select **Publish**.

Result
The knowledge base article is published for employees to view.
For more information on how to view the published knowledge base article, see View workplace knowledge base articles.

For more information on how to edit the publish knowledge base article, see Modify a workplace knowledge base article.

View workplace knowledge base articles

View workplace-related updates, processes, and other information in the knowledge base articles that your team created. Rate articles that you find useful.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure
1. Navigate to **All** > **Workplace Service Portal** > **Workplace Service Portal Home**.
2. Open the knowledge base page.
   - Select the **Knowledge** tab.
   - Select the **Knowledge Base** option.
3. In the KB categories list, select the category of the knowledge base article.
4. **Optional:** If you are unsure about the category, search for the article.
5. From the list of published knowledge base articles, select the article that you want to view.
6. **Optional:** Perform any of the following actions.
   - **Rate the article** out of 5.
   - If you found the article useful, Select **Yes**. If not, select **No**.
   - Leave a comment about the article and select **Submit**. You can also attach files.

Modify a workplace knowledge base article

Update a knowledge base article at any time. Retire a published article or republish a retired article.

Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

About this task
You can perform the following actions on a knowledge base article:

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- Publish the article to make it available to employees.
- Update the article at any time if necessary.
- Retire the article if it is no longer necessary.
- Republish a retired article if necessary.
- Delete an article.

A knowledge base article undergoes the following workflow when it is created:

- Draft
- Review
- Published
- Pending retirement
- Retired

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Knowledge management**.
2. Select **All articles**.
   You can also select any of the following options to find your knowledge base article.
   - **Published articles**
   - **Unpublished articles**
   - **Retired articles**
3. Select the knowledge base article that you want to modify.
4. Edit the fields that you want to change and select **Update**.
5. To retire, republish or a delete the knowledge base article, select any of the following options on the top right or at the end of the form.

Option	Description
Update	Select this option to update any changes made to the knowledge base article.
Retire	Select this option to remove the knowledge base article from the portal.
Republish	Select this option to republish a retired arti cle.
Delete	Select this option to delete the article from the application.

Result

The knowledge base article is modified with the changes.

QR code management

Generate and print QR codes for spaces and rooms. Employees can use these codes to make reservation-related actions on the Now Mobile app.

As a workplace manager, the application enables you to perform the following actions:

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- Create and generate QR codes for a single space or rooms.
- Apply condition filters to generate a QR code only for certain types of spaces or rooms.
- Print the QR codes and specify a file name for the codes. You can also configure the layout of the QR code and preview before printing.
- Configure, manage, and delete the QR codes that are generated in the application.

As an employee, use your Now Mobile app to scan the QR code and view the reservation that is made on the space or room. After scanning, you can perform the following actions on your Workplace Service Delivery for Mobile application on the Now Mobile app:

- Check in or check out the reservation.
- Update the reservation.
- Cancel the reservation.

Generate and print QR code for a space or room

Generate and print a QR code for a single space or room, or for multiple spaces or rooms. Employees can scan the QR code to view their reservation details using the Now Mobile app.

Before you begin

Enable mobile universal linking

Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Core** > **QR code management** > **Create QR codes**.
   If needed, other possible navigation options include the following:
   - Navigate to **Workplace Core** > **QR code management** > **Manage QR codes** and click **New**.
   - Navigate to **Workplace Core** > **Administration** > **Space type configuration**.

     Select a space type for which you want to generate and print QR code and click **Create QR codes**.
   - For rooms, navigate to **Workplace Core** > **Space Administration** > **Rooms**.

     Select a room and click **Create QR code**.
   - For spaces, navigate to **Workplace Core** > **Space Administration** > **Spaces**.

     Select a space and click **Create QR code**.
2. On the form, fill in the fields.

Generate QR form

Field	Description
Number	Number of the QR code.
Table	Table for which you want to add a QR code. By default, the table is set a as **Space [sn_wsd_core_space]**.
State	Status of the QR code generation.
Short description	Description about the QR code.

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Field	Description
Conditions	Filter conditions based on which the QR code must be generated. ○ To add a condition, select**Add Filter Condition**. ○ To add an OR condition, select **Add "OR" Clause**.

3. Click **Submit**.
4. To print the QR code, click **Print QR codes**.
5. In the Print QR codes dialog box, do the following:

   a. Specify a file name for the printed QR code in the **Enter file name** field.
   All the QR codes of the selected spaces are in a single PDF file with the specified file name.

   b. View the number of QR codes to be printed in the **Count** field.

   c. Select the layout of the QR code in the **Label layout** field.

   d. Preview the QR code print.

   e. Click **Print**.
   The QR code generation runs in the background.

Result
The QR codes are generated. The QR codes are printed in a single PDF file with the specified file name. You will receive an email notification after the QR code generation is completed with the QR code details.

What to do next
After the QR code generation is completed, go to **Manage QR codes** to view the generated file. For more information, refer to Manage QR codes.

Click **download** to download the PDF file.

Manage QR codes

View, update, or print the already generated QR codes in the application. Before printing, you can change the conditions of already generated QR codes if required.

Before you begin
Role required: sn_wsd_core.admin or sn_wsd_core.workplace_manager

Procedure
1. Navigate to **All** > **Workplace Core** > **QR code management** > **Manage QR codes**.
2. **Optional:** To generate a new QR code, click **New**.
   For more information, refer to Generate and print QR code for a space or room.
3. Select the QR code that you want to view or update.
4. **Optional:** Do any of the following actions with the QR code:

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- To update the QR code, change any field and click **Update**.
- To print the generated QR code, click **Print QR Codes**, and then click **download** to download the file.

  Note: The printed QR code is generated with the same file name. The last generated PDF file is replaced with the latest file.

- To delete the QR code, click **Delete**.

Location migration

Learn how to migrate location data from the ServiceNow Locations table to the Workplace Location table to use them in Workplace Service Delivery applications.

You can create a hierarchy to be used while migrating location data from the ServiceNow Location table [cmn_location] to the Workplace Location [sn_wsd_core_workplace_location] table.

You can perform the following actions while creating a location migration record:

- Configure location migration records by setting a parent location and a child location based on which the locations created in the Locations table [cmn_location] are migrated to the Workplace Location [sn_wsd_core_workplace_location] table.
- Specify conditions to filter the locations from the Locations table [cmn_location] based on their Location types.

You can set a location hierarchy configuration as optional depending on the Floor infrastructure. For example, for the **Floor** > **Area** > **Room/Space** hierarchy, you can set the location migration configuration record of **Area** > **Room** as an optional hierarchy because some floors might not have areas or only have spaces or rooms.

When you set a configuration as optional, then the records that don't match that configuration are matched with the next hierarchy. For example, if there are locations that don't match the **Area** > **Room** hierarchy, then they're matched with the next hierarchy, which is **Floor** > **Room**. If there are Rooms that aren't assigned to any Areas, then they're matched with Floors because the Area is optional.

After migrating the locations, if you create a location in the Workplace Core application, the location is automatically added in the ServiceNow® Location [cmn_location] table. You can configure the type of the location by setting Dictionary Overrides.

Configure location migration hierarchy

Create a hierarchy for how the location data from the ServiceNow® Location table [cmn_location] must be migrated to the Workplace Location [sn_wsd_core_workplace_location] table of Workplace Service Delivery.

Before you begin

Role required: sn_wsd_core.admin

About this task

The following location hierarchy is followed throughout the Workplace Service Delivery applications. The location migration configurations for these hierarchies are also available by default:

Note: The location migration configuration records of the following location hierarchies are inactive by default.

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Workplace Service Delivery location hierarchy

Parent	Child
None	Region
Region	Site
Site	Campus
Campus	Building
Building	Floor
Floor	Area
Area	Room
Area	Space

For more information about location migration configuration and conditions, refer to Location migration.

After you create the location migration configurations, you must perform the migration separately. To perform the migration after location migration configuration, refer to Migrate locations from Location table to Workplace locations table.

Note: You cannot migrate locations if they are not as the same as the Workplace Service Delivery location migration hierarchy, which is Region > Site > Campus > Building > Floor > Area > (Room > Space) or (Space > Room).

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Location migration configuration**.
2. Select **New**.
3. On the form, fill in the fields.

Location Migration Configuration form

Field	Description
Parent table	Parent workplace location table. The **Workplace location** is considered as the child workplace location table. The parent location is automatically generated after you select the **Workplace location**.
Workplace location table	Child workplace location table. This location is set as the child location in the hierarchy configuration.
Is optional hierarchy	Option to set this location migration configuration as optional. For example, if there are locations that do not match the Area > Room hierarchy, then they are matched with the next hierarchy, which is Floor > Room. If there are Rooms that are not assigned to any Areas, then they are matched with Floors directly because Area is optional.

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Field	Description
Application	Application of the location migration configuration. Ensure that **Workplace Safety Management** is selected. This field is automatically set.
Active	Option to activate the location migration configuration.
Domain	Domain of the location migration configuration. This field is automatically set.
Location condition	Conditions based on which the locations must be filtered for migration. The locations are filtered based on their Location type for the migration.

4. Click **Submit**.

Result
The location migration configuration record is added. The locations that match the specified conditions are filtered.

What to do next
Migrate locations from Location table to Workplace locations table.

Migrate locations from Location table to Workplace locations table

After you configure the location migration records, perform the migration action to migrate the locations from the ServiceNow® Location table [cmn_location] to the Workplace Location [sn_wsd_core_workplace_location] table in Workplace Service Delivery.

Before you begin
Ensure the following:

- The location migration configurations are active. For more information, refer to Configure location migration hierarchy.
- The location migration configuration from Campus to lower levels must always be in the Campus > Building > Floor > Area > Room/Space order. You can also have an optional hierarchy for a location migration configuration.

If you want to change the location type of a location created in the Location table [cmn_location], see Set the location type in Location table.

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Location migration configuration**.
2. On the Location Migration Configurations page, select the location migration configurations that you want to migrate.

   Note: Ensure that the location migration configurations are active.

3. Click **Migrate Locations**.
4. In the confirmation dialog box, click **OK**.

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Result
The location migration process runs in the background.

Set the location type in Location table

Set the location type of a location by creating a dictionary override of the table.

Before you begin
Role required: admin

About this task
When you create a location in the Workplace Core application, that location is automatically added in the ServiceNow® Location [cmn_location] table. The Location type of that location is set based on the Dictionary Overrides. The Dictionary Overrides are configured for all location tables such as Site, Region, Campus, Building, Floor, Area, and Room, except for the Space table. To set the Location type of the Space table, you can add a choice in the Location type and use it in the Space table's Location type dictionary override.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the **Location [cmn_location]** table.
3. In the Columns related list, select **Location type**.
4. In the Location type Dictionary Entry form, scroll down to the Dictionary Overrides related list.
5. Select the Dictionary Entry Override that you want to view or edit.
6. Edit the override by changing the **Default value**.

   The Location type of the locations that are created in the Workplace Core are set as per the specified default value. For example, if you have changed the default value of the Region Dictionary Entry Override to Zone, then the new locations created as a Region are set with the Location type as Zone.

7. **Optional:** If there is no default value that suits the location type, add a default value.

   a. In the Location type Dictionary Entry form, select the Choices related list.

   b. Click **New**.

   c. Specify the choice details.
   The choice is added. The choice is displayed while specifying a default value.

Result
The location type is set for the selected location table.

View workplace service usage analytics with Usage Insights

The ServiceNow® Usage Insights provides you with qualitative analytics on how the services provided by the Workplace Service Delivery applications are used by the workplace managers, employees, and other workplace users.

User analytics

The Usage Insights application provides you with data as to how an employee uses the various services and other actions that you provide them in the Workplace Service Portal. You can understand how an employee experiences and uses those services, such as their behavior and

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their journey around the portal. You can get an insight about the performance of the application by viewing a real-time analysis through data visualization.

You can log the events and get the analysis by enabling the analytics-related setting either on the Workplace Service Portal level, on the workplace service level, and anywhere throughout Workplace Core.

For more information about Usage Insights, refer to Usage Insights.

System properties

ServiceNow®, by default, provides a set of properties with Usage Insights that are common to all application using which you can specify how you want to enable analytics. As an admin, you can enable or disable the analytics for specific portals, specific users, or at the instance level. For detailed information about the system properties related to Usage Insights, refer to Usage Insights related properties.

Settings

The Usage Insights application enables you to specify the analytics settings on the portal level. Navigate to **All** > **Service Portal** > **Portals** > **Workplace Services** and select **Create Analytics Settings** to enable user analytics.

Request employee-related services

Use your workplace services. Make a reservation, schedule your arrival and more.

Note:

In Workplace Core [sn_wsd_core] version 2.19.0 and above, the navigation path for Workplace Services Portal is not available in the application search context menu **AllWorkplace Core**. You can access the Workplace Service from the Employee Center portal home page. For more information, see Workplace services on the Employee Center portal.

In Workplace Core Workplace Core version 2.18.1 and later the application search context menu is available (**All** > **Self-Service** > **Employee Center** > **Workplace services**.)

Schedule your arrival time at a workplace location

Schedule your arrival at a workplace location by using Workplace Core. Prevent long lines and safely enter the location.

Before you begin

To schedule an arrival using your mobile device, you must have the Now® Mobile app.

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Browse Workplace Services**.
2. Scroll and select **Schedule your arrival**.
3. On the form, fill in the fields.

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Schedule your arrival form

Field	Description
Entry point	Location where you want to schedule your arrival.
Building time zone	Time zone for the building of the selected entry point.
Date	Date of your arrival.
Arrival time	Time of your arrival. The time is displayed in 24-hour format.

4. Select **Submit**.

Result
The arrival request is created. The web page or your mobile screen is refreshed to show your arrival request details.

What to do next
You can check the details of your arrival schedule anytime.

1. Depending on your platform, do one of the following to view your requests:
   - On the Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
   - On the Now Mobile navigation bar, tap **For Me** and scroll down to the My Request section to view your requests.
2. If you want to cancel your arrival, select the arrival request and select **Cancel arrival**.

Making workplace reservations

Make workplace reservations in Workplace Core when you are ready to return to the office. You can reserve a workplace for a day or less directly or request a workplace for a specified period. Once a reservation request is approved and confirmed, you are notified about the reservation details. The Workplace Service Delivery also offers more advanced workplace reservation options in the Workplace Reservation Management application.

Reserving a workplace

As an employee, you can request a workplace reservation using Employee Center.

When making a reservation, you can choose an available space that you want to access or select an available area. If you have made a reservation for an area, you can work from any available space within that area when you return to the office.

You can select a shift of your choice from the shift schedules defined by your organization. If your organization doesn't use shifts, you can select a custom time period. Depending on your organizational guidelines, your reservation request might require an approval.

Note: If you need a workplace for only a day or less, you can reserve it directly and don't have to submit a request and get approval.

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Space reservation request states

After you submit a space reservation request, the status changes based on the action taken on it by your approving manager or the workplace manager.

- If your manager hasn't acted on your request, the state of the request remains Awaiting approval.
- If your manager approves your request and the space availability is confirmed, the state of the request changes to Closed complete.
- If your manager rejects your request, the state of the request changes to Closed incomplete.
- If your manager approves your request but the space you requested for isn't available for all or some days, the state of the request changes to Pending.

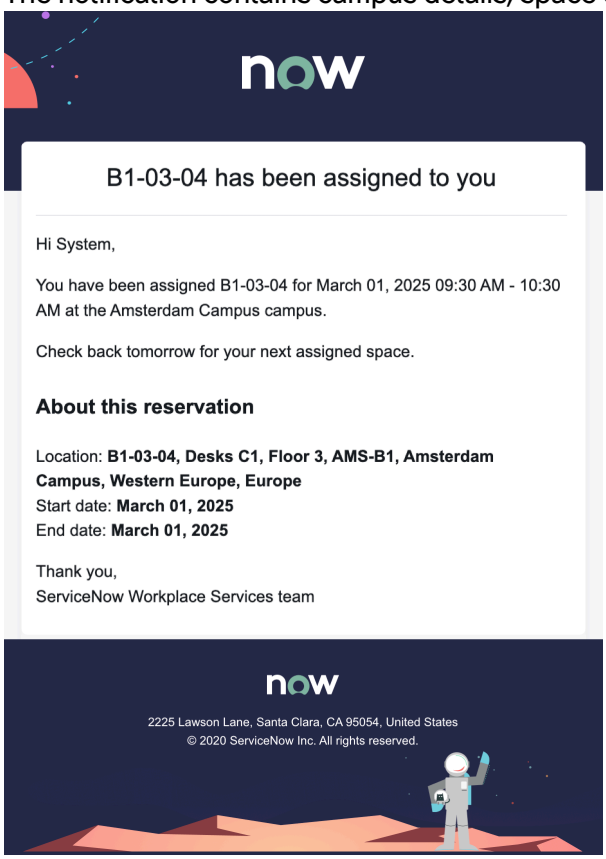
  You can follow up with your workplace manager to get a new space assigned and resolve your pending space request.

- If you cancel your request, the state of the request changes to canceled.

Email and push notifications

If you submit a space reservation request from the catalog item, or if a request is submitted on your behalf, you will receive an email notification about the request. If you have the Now® Mobile app, you will receive push notifications about your reservation requests.

The notification contains campus details, space details, and the reservation duration.



Request a workplace reservation for multiple days

Request a workplace reservation for the days during which you want to return to office by using Workplace Core.

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Before you begin

To request a workplace reservation using your mobile device, you must have installed the Now® Mobile app.

Role required: sn_wsd_core.workplace_user

About this task

Request a workplace reservation either in a defined shift schedule or for a custom time for a specific date range during which you want to work from the office.

You can also access the reservation form using your mobile device. From the Now Mobile app, navigate to **Workplace core** and choose either **Request a short-term shift and space** or **Request a short-term space**.

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center** > **Browse Workplace Services**.
2. Reserve a space for a predefined shift or for a custom time.
   - To reserve a space for a defined shift schedule, select **Request a short-term shift and space**.
   - To reserve a space for a custom time, select **Request a short-term space**.
3. On the form, fill in the fields.

Note: The visibility of some of the following fields depends on the application settings made by your administrator.

Reserve a short-term space form

Field	Description
Region	Region of your office location.
Site	Location of your office.
Campus	Campus of your office building.
Building	Office building that you want to return to.
Start date	Date from which you want access to the workplace.
End date	Date until which you want to access the workplace.
Shift	The shift schedule during which you want to visit the office. Only the shifts available for the selected location and date range are displayed. Only the shifts that you are part of are displayed. This is dependent on the system properties which were configured by your organization.
Shift detail	Details of the shift that you selected.

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Field	Description
	The shift detail is auto-filled based on your shift selection.
Start time for each day	Time from when you would access the workplace. This field is visible if you selected **Request a short-term space**.
End time for each day	Time until when you would access the workplace. This field is visible if you selected **Request a short-term space**.
Floor	Floor of the area or space that you want to access.

4. Select **Submit**.

Result
The state of your request is set to Awaiting approval, which indicates that the request has been sent to your manager for approval.

What to do next
You can check the status of your reservation request or choose to cancel your request using Workplace Service Portal or the Now Mobile app.

- On Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
- On the Now Mobile app's navigation bar, tap **For Me** and scroll down to the **My request** section to view your requests and reservations.
- To cancel a reservation, go to the **Requests** page in the Workplace Service Portal or **My request** page in the Now Mobile:
  - To cancel the reservation request, select **Cancel request**.
  - To cancel a single reservation within the reservation request, select **Reservation details**. Select the reservation you want to cancel and select **Cancel reservation**.

Reserve a workplace for a day

Reserve workplaces for a day on which you want to return to the office by using Workplace Core.

Before you begin
To reserve a workplace using your mobile device, you must have the Now® Mobile app.

Role required: sn_wsd_core.workplace_user

About this task
Reserve spaces for a period less than or equal to 24 hours on the day that you want to work from the office, either in a defined shift schedule or in your custom timings.

You can also access the reservation form from the Now Mobile app. Navigate to **Workplace Core** and choose one from **Reserve a shift and space for a day** or **Reserve a space for a day**.

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace services** > **Browse Workplace Services**.

   Note: You can also raise a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service.

2. Reserve a space either for a defined day shift or a custom date.

   - To reserve a space for a defined shift schedule, select **Reserve a shift and space for a day**.
   - To reserve a space for custom timings, select **Reserve a space for a day**.

3. On the Reserve a space form, fill in the fields.

   For a description of the field values, see Reserve a space form.

   Note: The visibility of some of the following fields depends on the application settings made by your administrator.

4. If the **Area** and **Space** fields are available, select an area or a space that you want to reserve.
5. Select **Submit**.

Result

The web page is refreshed to show your reservation details.

What to do next

You can check the details of your reservation or choose to cancel it anytime using Workplace Service Portal or the Now Mobile app.

- On the Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
- On the Now Mobile app's navigation bar, tap **For Me** and scroll down to the My Request section to view your requests and reservations.

  If your organization has enabled the functionality to book an Uber from your mobile device, you would see a **Book Uber** option on your reservation details screen on Now Mobile. Tapping on it would redirect you to the Uber mobile app, if you have the app installed on your mobile device.

You will receive an email notification 15 minutes before the reservation to check in and another email notification 30 minutes before the reservation end time to check out.

- In the check-in email, select any of the following actions.
  - **Check in**: Check in your reservation.
  - **Cancel this reservation**: Cancel if the reservation is no longer required.
  - (Optional) **Check out**: Check out early before the reservation end time.

  Note: If you do not check in at the reservation start time, the reservation is automatically set to *No Check In* after 24 hours.

- In the check-out email received before the reservation end time, select **Check out** to check out the reservation.

  Note: If you do not check out at the reservation end time, the reservation is automatically set to *No Check Out* after 24 hours.

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Manage workplace activities and services with Location directory

Explore workplace campuses, sites, buildings, and neighborhoods using the Location directory. Get directions using map routes to a meeting room, building, or co-workers to collaborate effectively. Search for employees, locations, and neighborhood spaces. Reserve a space, request, or report a workplace service issue. Filter spaces by reservation states, occupancy states to get insights on space availability.

The location directory provides the Map view and the Card view to manage workplace activities and services. Indoor Mapping must be configured so that your locations can be viewed on a floor map. If a location doesn't have a floor map, then only Card view is displayed.

Reservation and occupancy status on the Location directory

Configure the Location directory to filter spaces by reservation and occupancy states.

Note: This is controlled through the **Show reservation and/or occupancy information on Location directory** map property and when it is set to true, you can view the reservation and occupancy status for a selected location on the floor map. The Workplace Reservation Management and Workplace Connectors must be installed and configured to show both reservation and occupancy statuses. Occupancy state for a location is displayed when an occupancy sensor provider is integrated with Workplace Connectors and occupancy sensor data is available for a selected location. For more information, see Configure map properties for Location Directory.

Filter spaces by occupancy and reservation statuses for a selected space.

- When only Workplace Reservation Management is configured and available for a selected location, filters for reservation status are available. Option to filter by occupancy status isn't available on the Show filters panel.
- When only Workplace Connectors with occupancy sensor data is configured, filters for Occupancy status are available. Option to filter by reservation status isn't available on the Show filters panel.
- When both Workplace Reservation Management and occupancy sensor plugins are configured and available. The Show filters panel shows both occupancy and reservation statuses.

Based on the occupancy and reservation status, the Location directory shows the following states for space availability on the Card and Map view.

- **Available**: Status to indicate that a selected space is available for reservation.
- **Currently booked**: Status to indicate that a space is booked or reserved for a meeting.
- **Not available**: Status to indicate that the space isn't available for reservation. This state is shown when Workplace Reservation Management is configured but the **Is Reservable** field on the Reservation portal is set to **false** (**All** > *Workplace Reservation Management* > **Administration** > **Workplace Spaces**).
- **Currently Occupied**: Status to indicate that a location has occupancy sensors. The occupancy state is shown as **Currently Occupied** on the floor map.
- **Currently unoccupied**: Status to indicate that a location has occupancy sensors but the space isn't occupied.
- **Sensor not installed**: Status to indicate that occupancy sensor is not installed and configured for a location.
- **Sensor not working**: Status to indicate that the occupancy sensor data is in an invalid state or it isn't functional for a location.

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Map display settings

Configure map display setting options to show permanently assigned workplace locations on the map. If privacy is enabled, workspaces allocated for private users aren't displayed on the map. For more information, see Work with the Map view on the Location Directory.

Auto-refresh reservation and occupancy states on Location directory

Configure Map properties to refresh automatically and get the latest reservation and occupancy status on the Location directory. Use filters on the Location directory to filter out and view either reservation or occupancy status or both reservation and occupancy status.

Configure map properties for Location Directory

Configure map properties to enable reservation states, occupancy states, display permanent seat assignments, or auto-refresh time interval for showing the latest reservation and occupancy information on the map. Show or hide neighborhoods on the Location directory by using a map property.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Space mapping** > **Map properties**.
2. Configure the map properties for the Location directory.

   For more information about the map properties, see Properties installed with Workplace Space Mapping.
3. Select **Save**.
   The updated map configuration properties are available on the Location directory.
4. Display the name of a person reserving a space on the map by following these steps.
   a. In the filter navigator, enter `sys_properties.list`.
   b. Select the **sn_wsd_core.floor_plan.portal.show_reservation_details** property.
   c. Set the value of the property to **true** and save the record.

Work with the Map view on the Location Directory

Work with Map view to search for workplace users, locations, spaces, and neighborhoods. Get directions to a workplace location, meeting rooms, or an employee to collaborate quickly and effectively. Filter spaces based on reservation and occupancy states, space types, or neighborhoods.

Before you begin

https://player.vimeo.com/video/1098053076?h=532bc7393e&badge=0&autopause=0&player_id=0&app_id=58479

- Workplace Core
- Workplace Reservation Management (Optional)

  Filter and display the reservation status for a selected location on the Location directory.
- Workplace Connectors (Optional)

  Filter and display the occupancy status for a selected location on the Location directory.

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- Indoor Mapping
- Workplace Space Mapping

Note: Confirm that the map properties for the Location directory are configured by your administrator. Map properties for the Location directory provide options to:

- Filter spaces based on reservation and occupancy states
- Automatically refresh reservation and occupancy data on the Location directory
- Control the Map display setting options to display permanent and private workplace profile users.
- Show or hide neighborhoods for a location.

For more information, see Configure map properties for Location Directory.

The latitude and longitude of your regions, sites, campuses, and buildings must be created. If the latitude and longitude aren't specified, you can't view a campus or its buildings on the map. Contact your administrator for more information.

While reserving or viewing a space, the employee can see if a space is part of a neighborhood. The neighborhood icon ( ) is displayed on the space card.

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace Services**.
2. From the **Workplace Services** list, select **Browse Workplace services**.
3. From the **Support resources** section, select **Location directory**.

   By default, the Location directory home page opens on the World map.

   Your location is displayed with a location pin ( ).

   .
4. To select a campus on the map, enter the name of a campus or select a campus name from the **Select Campus** list.

   a. Select a campus from the list or search for a campus in the search bar.
   If you search for a Neighborhood, all the campuses that contain the neighborhood are displayed on the map and the neighborhood card. You can copy the neighborhood URL from the context menu.

   b. **Optional:** Additionally, use the zoom in ( ) controls on the map to bring into focus your location or select the location pin marker icon ( ).

   (Optional) The campus when selected or zoomed into shows the buildings within a campus.

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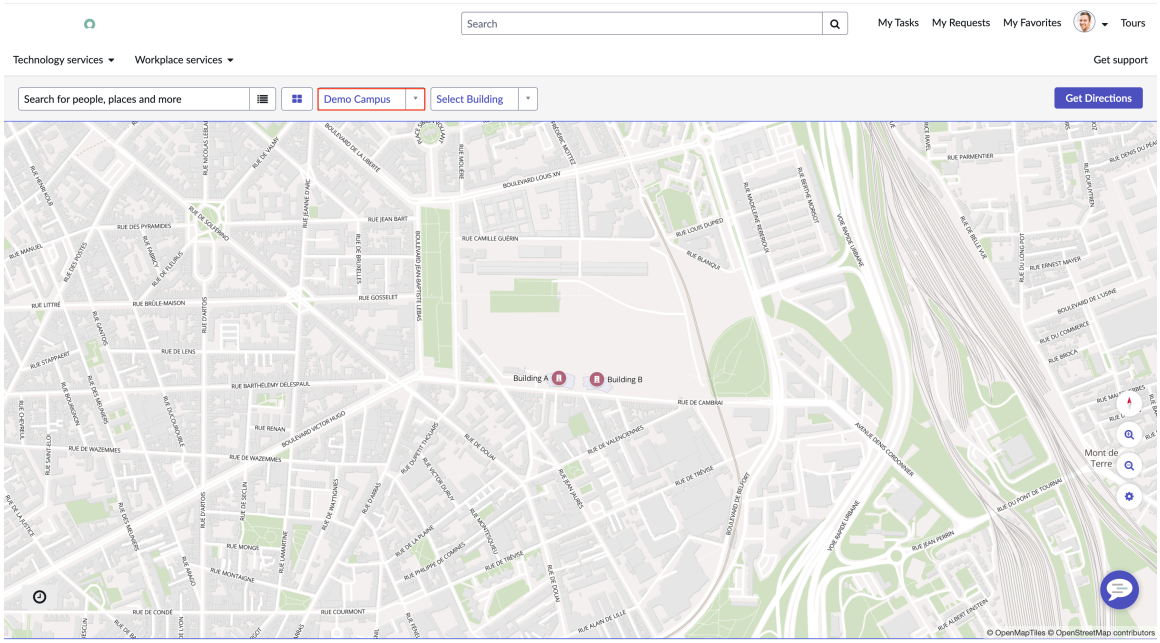
The selected campus is displayed on the map.



5. When you select a campus, the **Select Building** tab is enabled on the menu.
   If you search for a Neighborhood, all the buildings that contain the neighborhood are displayed on the neighborhood card. You can copy the neighborhood URL from the context menu.
6. Select a building from the **Select Building** list option.
   For example: Building A

   You can also use the Zoom in controls on the map to select a building from a campus.
7. When you select a building, the **Floor**, and **Neighborhood** menu options are enabled on the menu.

   If you search for a Neighborhood, all the floors that contain the neighborhood are displayed on the neighborhood card. You can copy the neighborhood URL from the context menu.

   The **Show filters** option is enabled when a floor is selected from the **Floor** tab.

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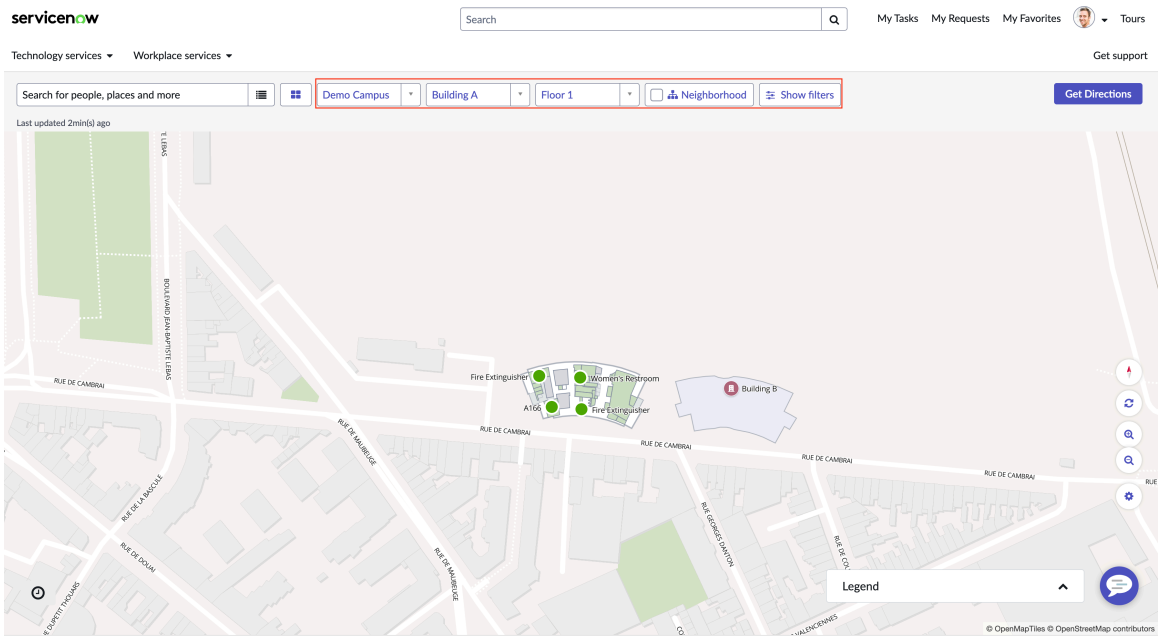

Note: The **Last updated <time interval>** label is shown on the map after selecting a building. For example,**Last updated 1 min ago**. The map is automatically refreshed if your administrator has enabled the map property (**Auto Refresh time interval (in mins) for showing Reservation and/or Occupancy information on the Location directory**). This property fetches the latest reservation and occupancy data on the map.

8. Select a floor from the **Floor** list option.
   Floors that don't have Indoor Mapping maps are tagged as **Floor <number>- No map** in the Floor tab list. For example, **Floor 5 - No map**.

   Note: When a floor doesn't have a map associated with it, you're redirected to the Card view. If a location doesn't have Indoor Mapping, the Card view is displayed by default.

9. Select the **Neighborhood** check box to show designated neighborhoods for a selected location.
   Neighborhoods are color-coded based on the assigned department, cost center, or workplace entity. For more information, see Step 17.

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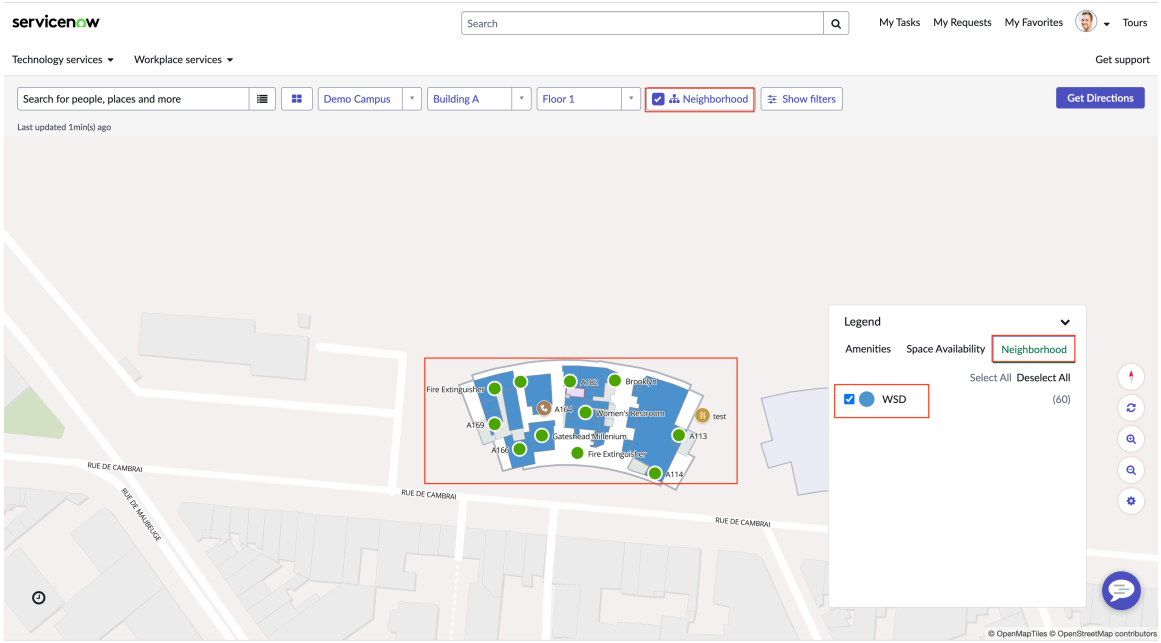
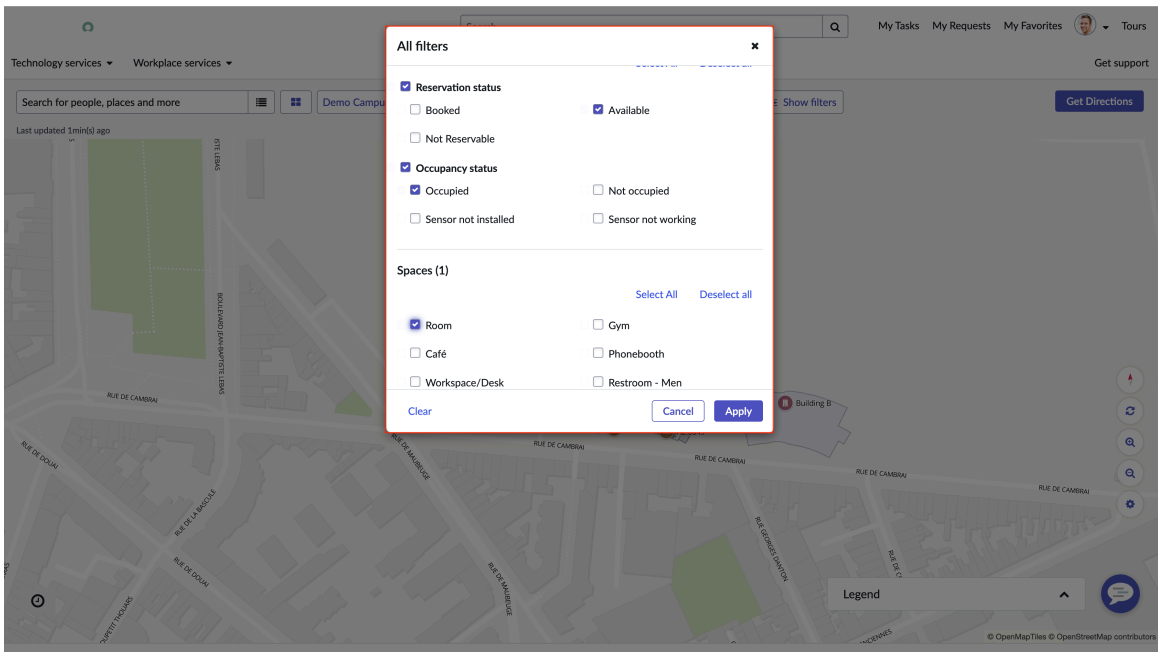


10. **Optional:** Select the **Refresh view** icon on the map ( ) to refresh the map.
When you manually refresh the map, the application fetches the latest reservation and occupancy status for a selected location.
11. **Optional:** Select **Show Filters** to filter spaces on the map by reservation states, occupancy states, and space types (rooms, gym, elevator, and so on).

Note: The **Show filters** button is displayed on the map when **Show Reservation and/or Occupancy information on the Location directory** [sn_wsd_space_map.show_rsv_occ_data_loc_dir] map property is set to **Yes** by your administrator. Filters can be applied at a floor or space level. When this property is set to **No**, only space type filters are available for you to select.



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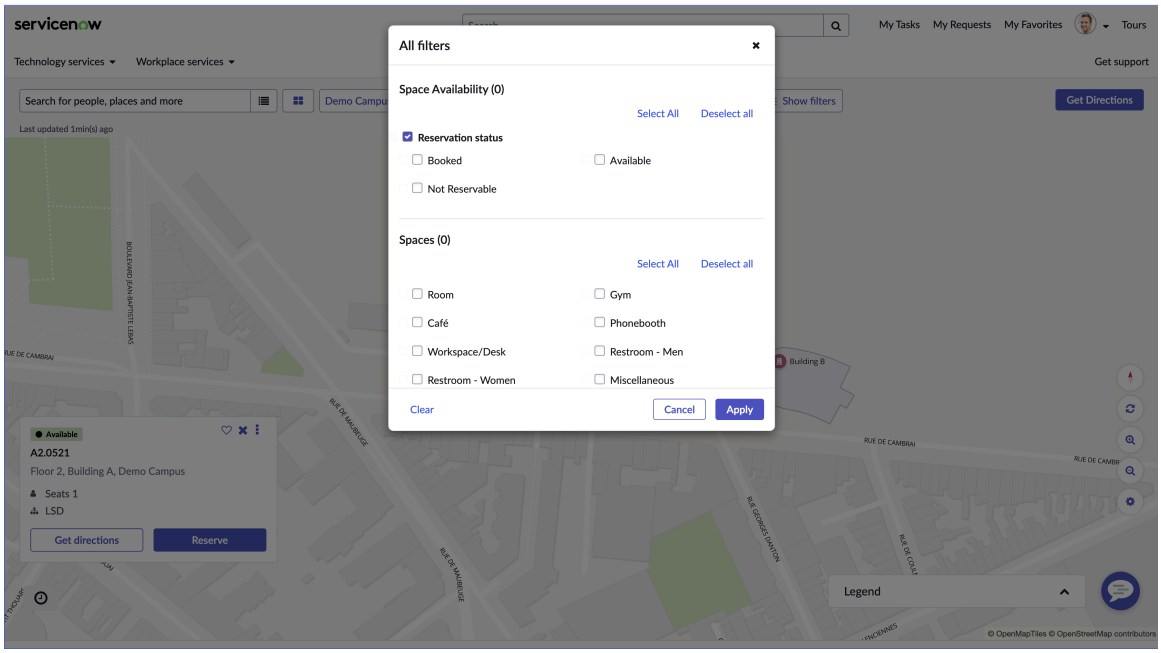

Select and filter any of the following available options in the All filters dialog box:

- View space availability and reservation status on the map, select the **Reservation status** check box.

  The map displays reservation status and spaces are shown with color-coded icons for different reservation states on the map. For more information, see Legends in Step 17.

- Filter spaces on the map with only reservation status. Select any of the following options:
  - Booked
  - Available
  - Not Reservable
  - Currently booked
- Selecting the **Select All** option enables all reservation statuses (Booked, Available, Not Reservable, and so on) on the map.

- Select the **Occupancy status** check box to view only occupancy sensor data icons on the map.

  The map displays reservation status and spaces are shown with color-coded icons for different reservation states on the map. For more information, see Legends in Step 17.

- Select any of the following occupancy states and filter spaces on the map with occupancy data.
  - Occupied
  - Not Occupied
  - Sensor not installed
  - Sensor not working
- Selecting the **Select All** option to filter all occupancy states on the map.

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Note: Occupancy states are only shown on the map if Workplace Connectors is installed and configured for a selected location. Your administrator must also configure the map property **Show Reservation and/or Occupancy information on Location directory [sn_wsd_space_map.show_rsv_occ_data_loc_dir]**.

Spaces on the map with matching the filter conditions are highlighted. Spaces that don't fulfill the filter conditions or that don't have a filter applied are shown in white (polygon color).

- When both reservation and occupancy filters are applied, then maps shows both reservation and occupancy states for a selected floor.
- When only reservation or occupancy filters are applied, then only reservation or occupancy states are displayed.

- Select the **Spaces** check box to filter selected space types on the map. For example, the following space types can be selected:
  - Rooms
  - Gym
  - Cafe
  - Phone booth
  - Workspace/Desk
  - Restroom-Men
  - Restroom-Women
  - Miscellaneous
  - Elevator
- Select the **Select All** option to select all the space types available for a location.

  Note: Indoor Mapping place types are displayed as space types on the Location directory.

12. **Optional:** Select **Apply**.
    The selected filters are applied and the **Filter by label** on the map shows filtered items as pills on the map. For example: Booked, Available, and so on. Select **Clear All** to remove the filter pills from the map.

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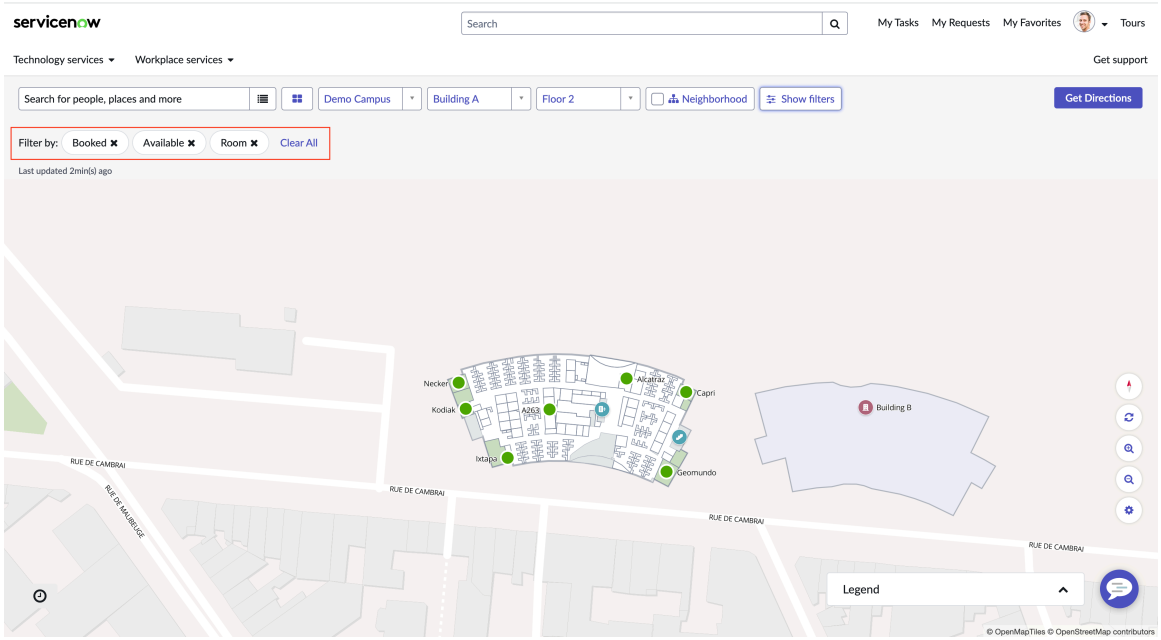

13. Select a space on the map to view the Space card details.

You can view the following information on the space card:

- Labels for space occupancy and reservation status are displayed on the space card panel. For example, **Available**, **Currently booked**, **Booked**, **Blocked**, and so on.
- Check if a space is being used by an employee or a team member.
- View the spaces surrounding your desk or workplace location.
- View employee avatar or workplace profile initials on the space card details.
- View your team and collaborators.
- Private spaces are hidden when the profile or space is indicated as private. The employee name isn't displayed.
- View permanent seat assignment. Permanently assigned spaces are displayed with workplace profile names.
- View standard workplace services for a selected space.
- View a designated neighborhood, The neighborhood icon ( ) is displayed along with the number of seats.

a. Select the More actions icon ( ) and use any of the following options as required:

- Copy URL: Option to copy a space location link. The Copy URL link, when selected, copies the location URL link to a clipboard. The location URL link can be shared with your team members and colleagues.
- Raise an issue: Option to raise a workplace service request or a workplace service issue. For example, catering, cleaning, furniture, and so on

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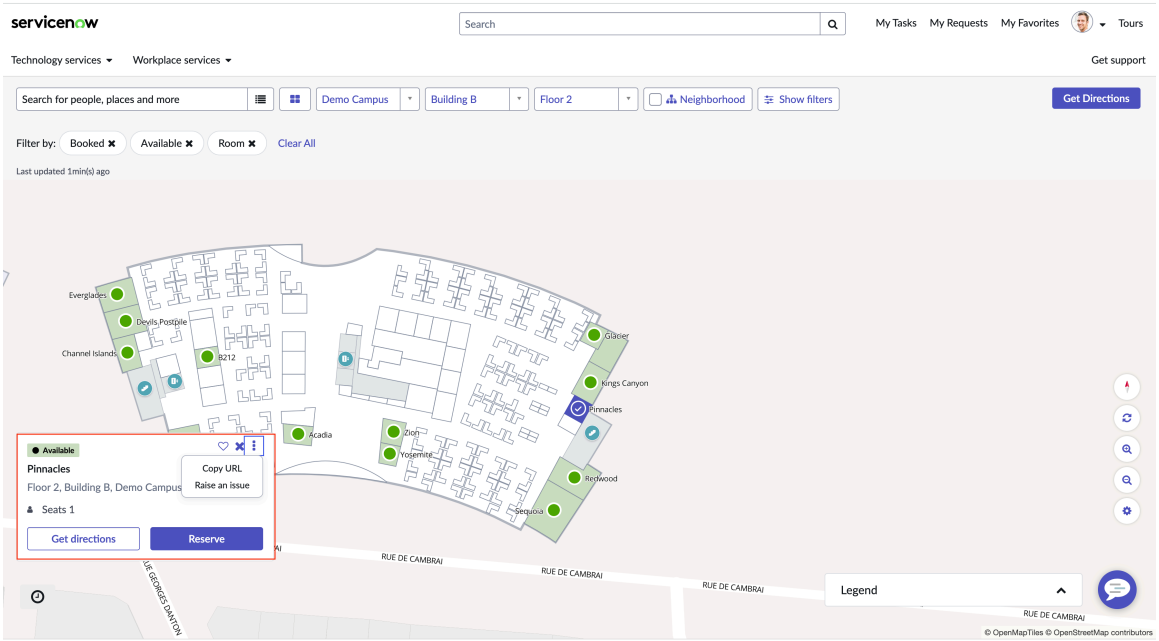

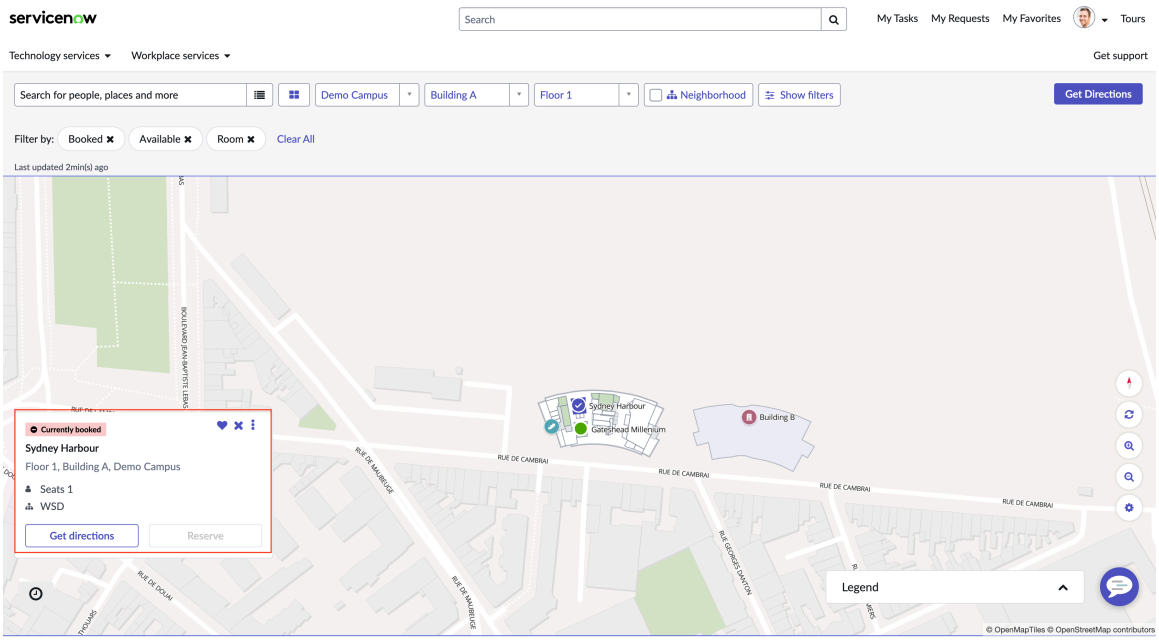

b. Select **Reserve** to reserve an available space.

The employee can see the availability of the space and see if it's reserved. A tag is added to indicate the space is occupied and used when a space is already reserved. If the reservation status label on the space card panel is **Currently booked**, the **Reserve** button isn't available for selection and is inactive.

c. Select **Get Directions** for wayfinding and navigating to a meeting room or to where your co-worker is seated.
You can find directions with the same floor or the same building or to a different floor or a different building.

14. Optional: To get directions from one space to another, perform the following actions on the map.

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Important: When privacy is enabled for an employee, using the Get directions option doesn't display the employee or colleague's workplace location.

a. Select a space and on the space card details panel, select **Get directions**.

b. Enter the start and end points for navigation and wayfinding.

(Optional) Complete the following:

- Select start point: Option to enter the starting point from where you want your direction or wayfinding route to start. For example, select a floor in a building from the list. You can also select a different building. For example, Starting point as Building A or Building B. You can enter a collaborator or colleague's name to find directions to their desk or location on the map.
- Select end point: The End point is selected by default for a selected building and floor. You can change it to another building or to a location or workplace profile user of your choice.

c. Select direction modes as **Default** or **Accessible**.

Note: Accessible wayfinding paths are placed near or adjacent to an elevator.

d. Optional: Change the distance measurement units by selecting the distance value. You can select either meters or feet based on your preference. The default unit is set based on your location.

e. Optional: Enable step-by-step directions on the directions card. The system displays directions from the start point to the end point. The distance is displayed in feet or in meters based on your selection.

15. Select the Map display settings icon ( ) to open the Display options panel.

- Show names for permanent assigned seating: Option to show users with permanently assigned seats on the map. Select the check box if you want to display permanent workplace user profiles on the map.
- Don't show employee names: Option To hide private workplace users profile names on the map. Select the check box to hide private users on the map.
- Select **Apply**.

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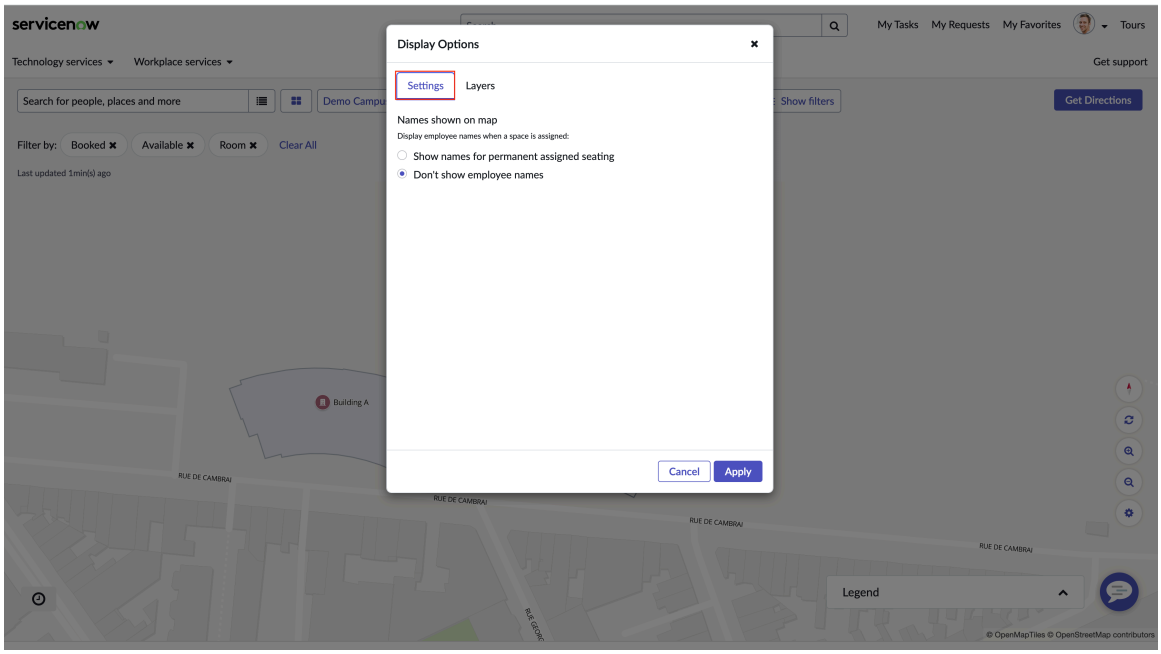
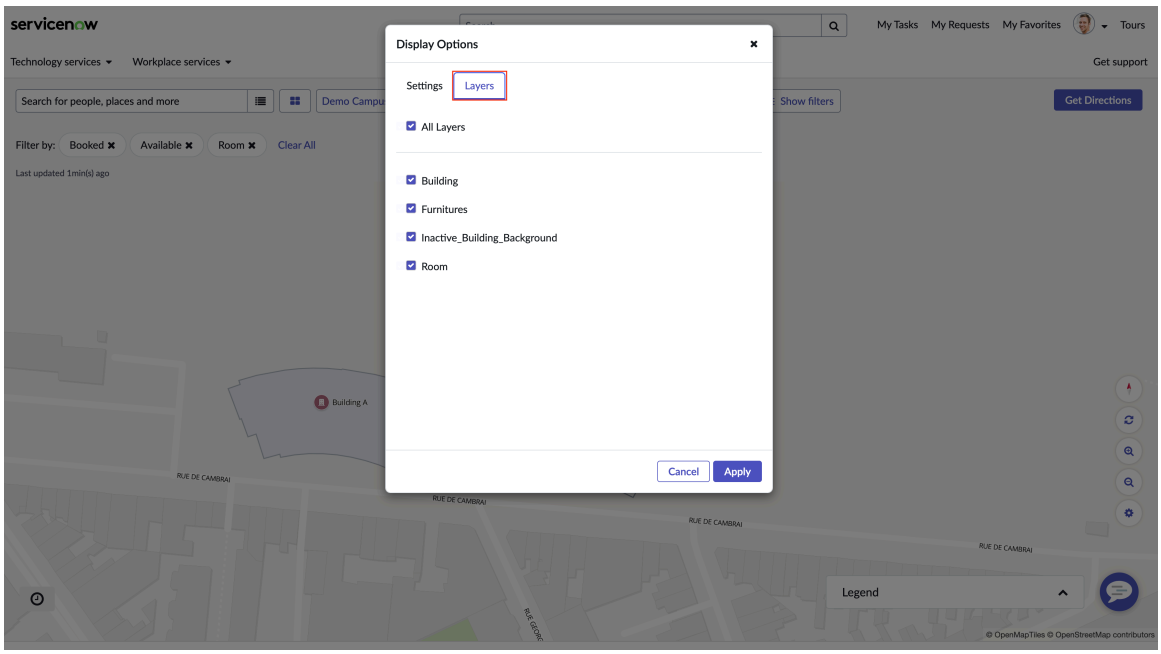


a. To show layers on the map, select all the available layers for a location or select layers as required.

> **Note:** The Layers that you have defined in Indoor Mapping are shown on the map.

b. Select **Apply**.



16. To reset the map to north, select the **Reset North** icon ( ) on the map.
17. Select a **Legend** list to view and interpret the colors and symbols or icons available on the map.

    Legend shows the following options.

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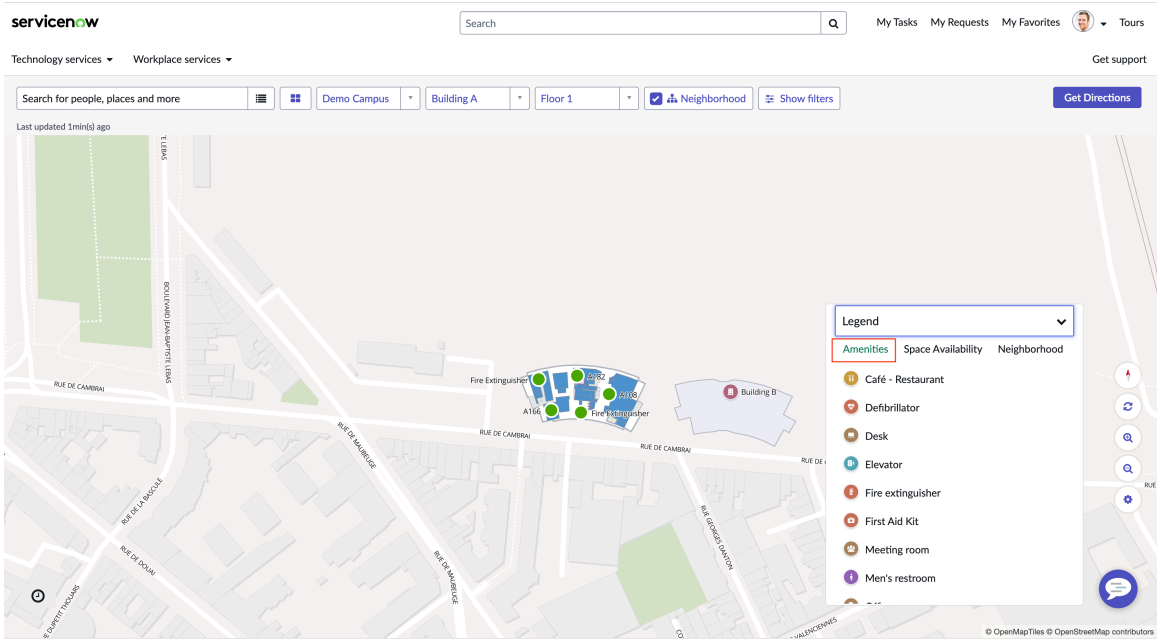
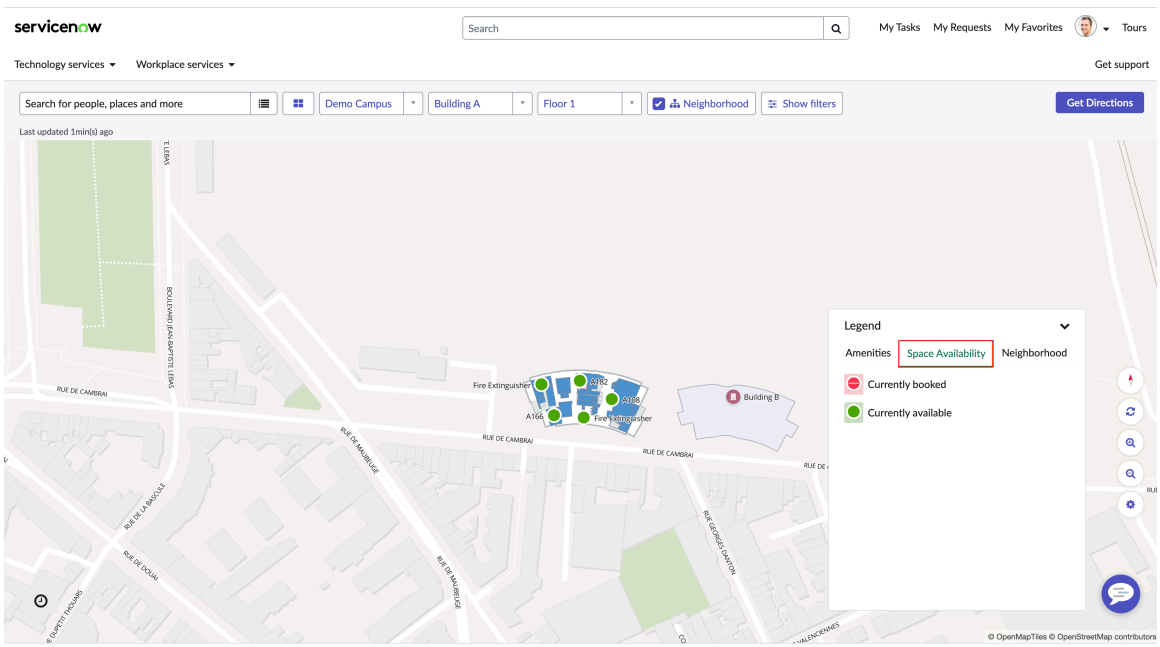
- Amenities: Option to view map legend assigned for Spaces types. For example, Room, lounge, desk, and so on.



- Space Availability: Option to view map legends for space availability based on reservation states and occupancy states. For example: Available, currently booked, Occupied, and so on.



- Neighborhood: If you have selected the **Neighborhood** check box, the map legend shows a toggle option to show or hide neighborhoods on the map. If the Neighborhood check box isn't selected on the map menu (See step 17), you don't see the option to show or hide the neighborhood on the Legend.

> **Note:** Option to show or hide a neighborhood for a location is dependent on a map property configuration [sn_wsd_space_map.display_neighborhood_on_the_map]. This property is set by your administrator.

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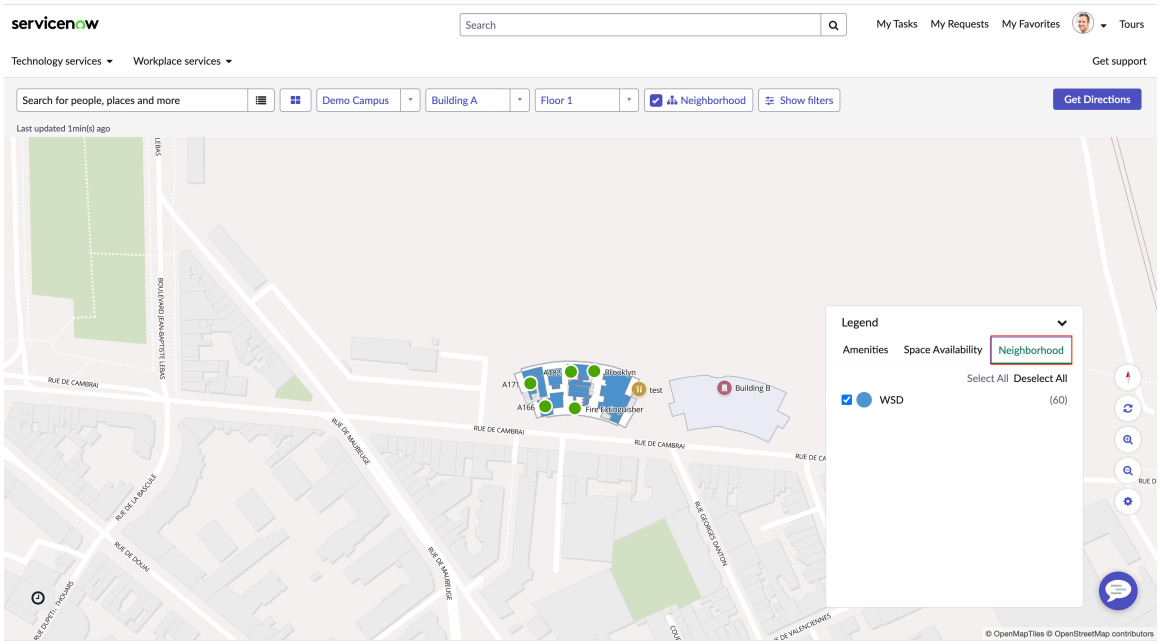

- Select the Neighborhood toggle on and toggle off button to show or hide the neighborhoods on the map.
- Neighborhoods are color-coded based on the department, cost center, or workplace entity.
- Selected locations or workspaces with a neighborhood are filled with neighborhood-assigned colors.
- The **Select all** and **Deselect all** options are available on the Legend to select or deselect neighborhoods.
- If a space belongs to more than one Neighborhood, it's represented with a unique color on the map and the Neighborhood is displayed on the map legend with "&."

18. To switch to the Card view, select the toggle button ( ).

Work with the Card view on the Location directory

Work with Card view to reserve a space or raise a workplace service request. Filter spaces based on reservation and occupancy data. View designated neighborhoods on the space card. Switch to Map view anytime when you want to locate a workplace location on the map or to get directions to a collaborator or location.

Before you begin

Make sure to activate and configure the following plugins:

- Workplace Core
- Workplace Reservation Management (Optional)

  Filter and display reservation status for a selected location on the Location directory.
- Workplace Connectors (Optional)

  Filter and display occupancy status for a selected location on the Location directory.

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- Indoor Mapping
- Workplace Space Mapping

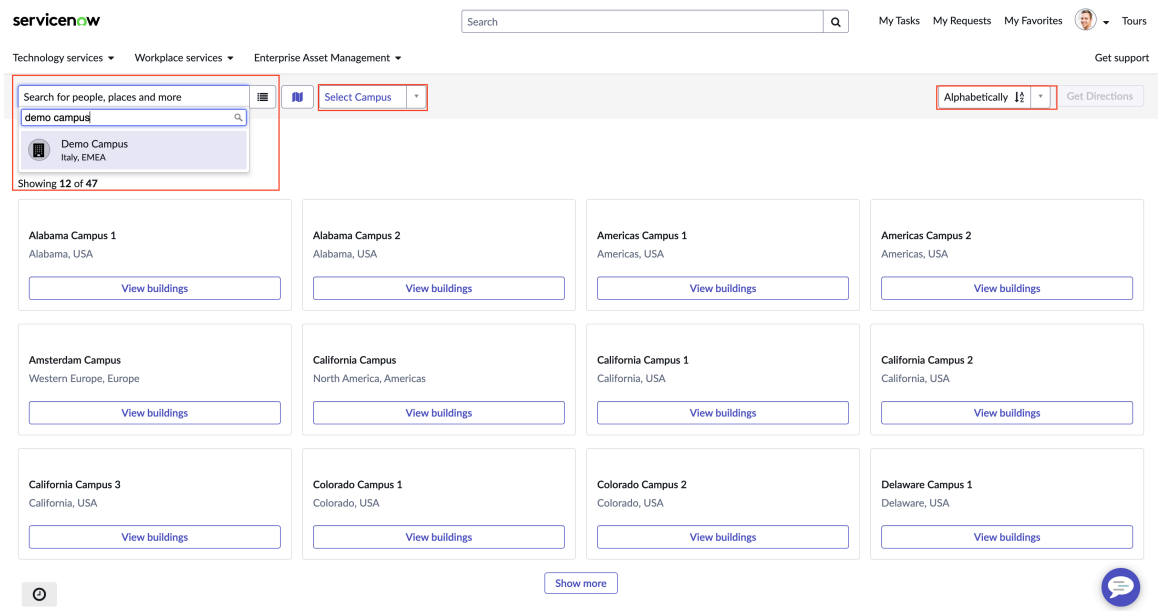
Role required: admin

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace Services**.
2. From the **Workplace Services** list, select **Browse Workplaces** > **Support resources** > **Location Directory**.

   Location directory home page is displayed. By default, the Location directory opens in the Map view. If there are no maps available for a location, the Card view is opened by default.

   .
3. If you are on the Map view, select the Card view icon ( ) to switch to the Card view.
   The Card view home page is displayed with a list of all campuses.



4. Select a campus from the **Select campus** tab.

   You can also search for a campus using the search field option on the Card view.

   To sort locations alphabetically, select **Alphabetically** and sort as required (A to Z or Z to A).
5. When you select a campus, the **Select Building** tab is enabled.

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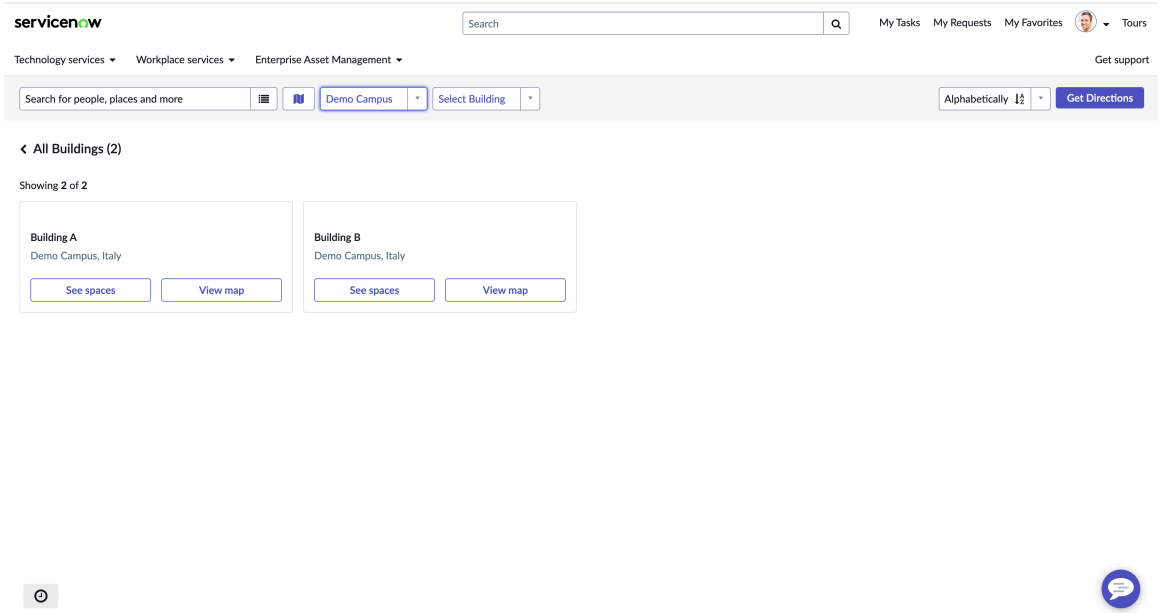
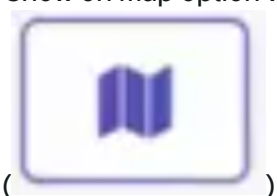


6. Select a building from the **Select Building** list option.
   For example, Building A.

   When you select a building, the **Floor** tab is enabled on the Card view. After selecting a floor, the **Show Filters** option is enabled.

7. After selecting a building, select **See Spaces** to view the number of allocated workspaces for a building.

   The All spaces page for a selected building is displayed. All spaces in a building are displayed as individual cards.

   Note: Space card doesn't show the Show on map option when there's no map available for a building. The toggle button icon () to switch to Map view is also grayed out on the Card view.

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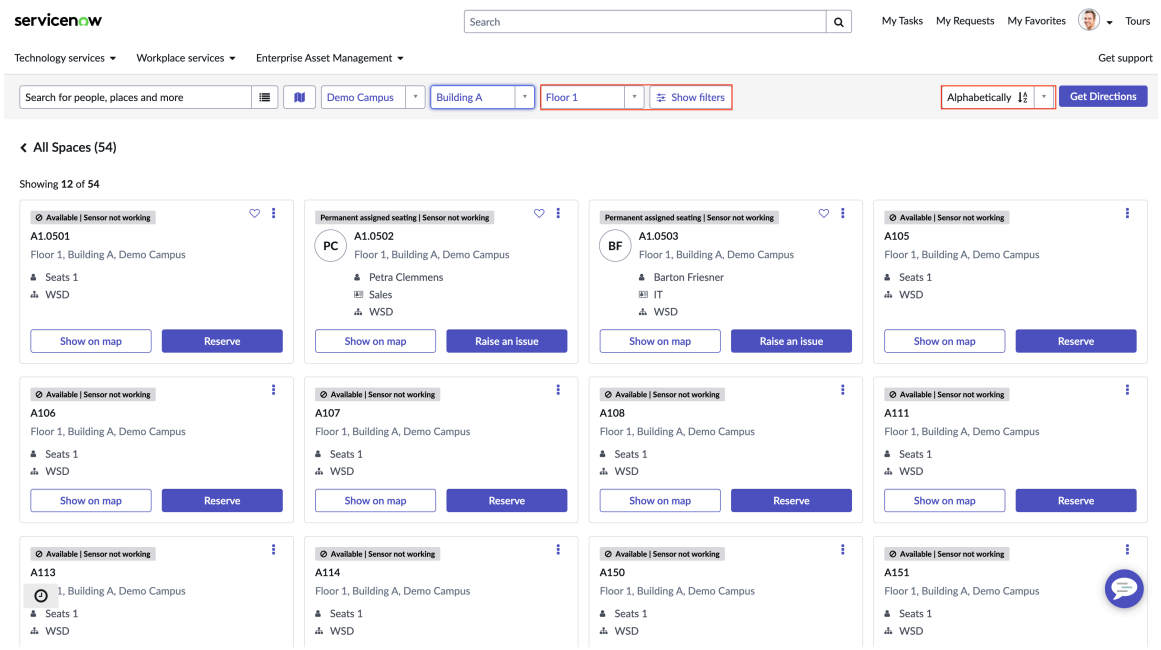

Labels or tags available on a space card show Reservation and Occupancy status, number of seats available in that space, and designated neighborhoods. The space card also provides the following information:

- Option to mark a space as favorite (♡)
- Space name
- The employee avatar or workplace profile initials are displayed as image on the space card details.
- Occupancy status
- Reservation status
- Space image
- Floor, building, and campus name and details
- Space Capacity
- Standard workplace services
- Neighborhood

8. **Optional:** On the space card, select the More actions icon (⋮).

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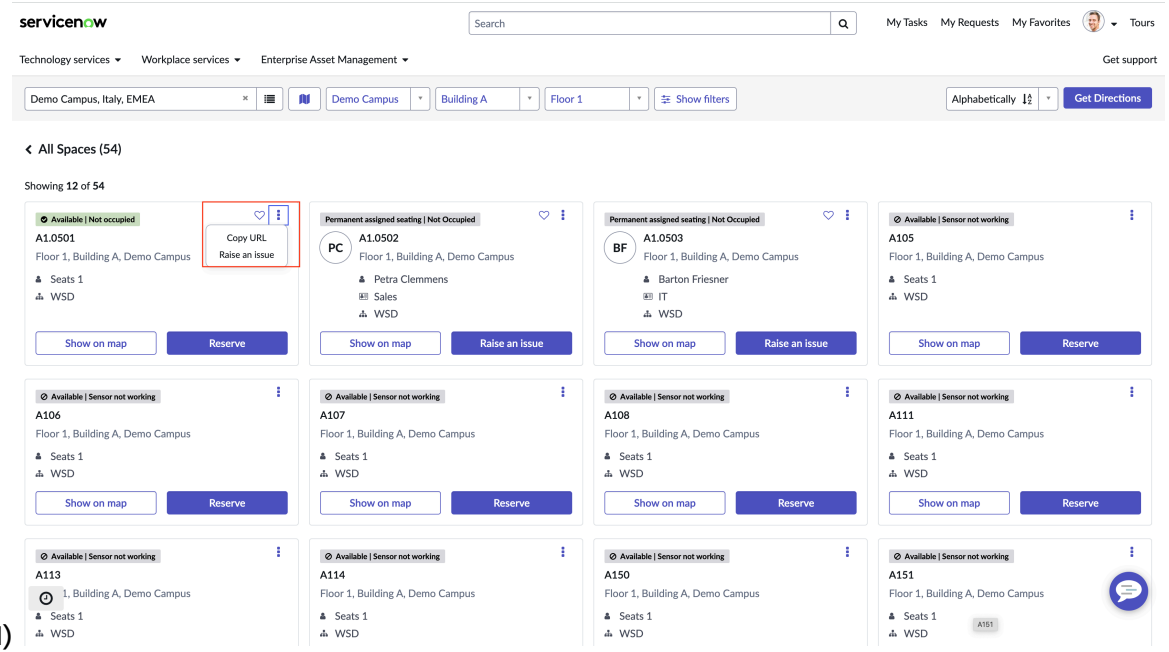
(Optional)



Select the following options as required:

- Copy URL: Option to share the space location browser link and share it with your team members.
- Raise an Issue: Option to raise a workplace service request. This option is available in the More actions option only for a space that can be booked or reserved. In case if a space is already reserved or not available, then the Raise an issue option is available as a button in the space card.

9. Select **Reserve** to reserve a space.

   The selected space opens in a browser tab. The space card details page shows options to select reservation **Start date and time** and **End date and time**. The selected space is also shown on the map (if floor map is available). Complete the reservation process on the Reservation details page.

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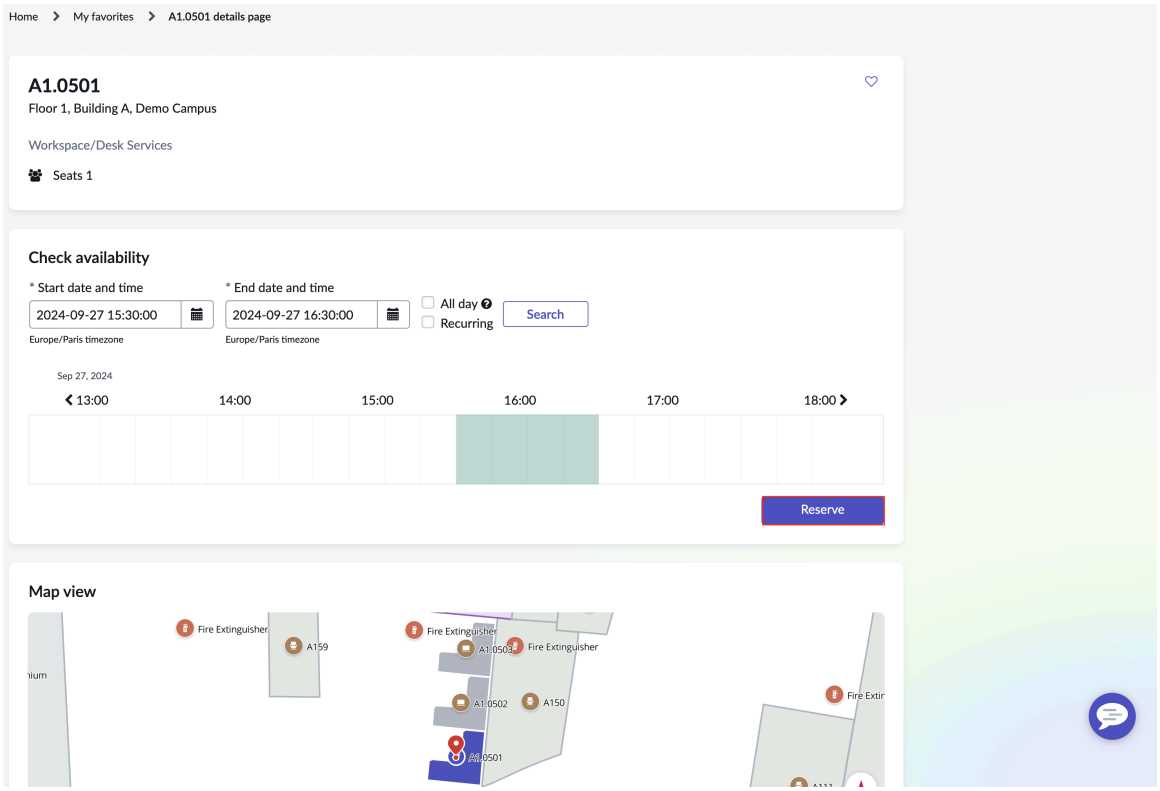

10. Navigate back to the All spaces page on the Card view and select **Show on map**.
    The space card details panel opens on the map and shows option to raise a request or reserve a space, and get directions to a location for wayfinding. For more information, see Work with the Map view on the Location Directory.
11. **Optional:** Select **Raise an issue** to request a workplace service or raise a workplace service issue.
    You're redirected to the General Request page on the Employee center.
12. Select **Show filters** to filter spaces based on reservation states, occupancy states, and space types.

    Note: The **Show filters** button is displayed on the map when **Show Reservation and/or Occupancy information on the Location directory** [sn_wsd_space_map.show_rsv_occ_data_loc_dir] map property is set to **Yes** by your administrator. Filters can be applied at a floor or space level. When this property is set to **No**, only space type filters are available for you to select.

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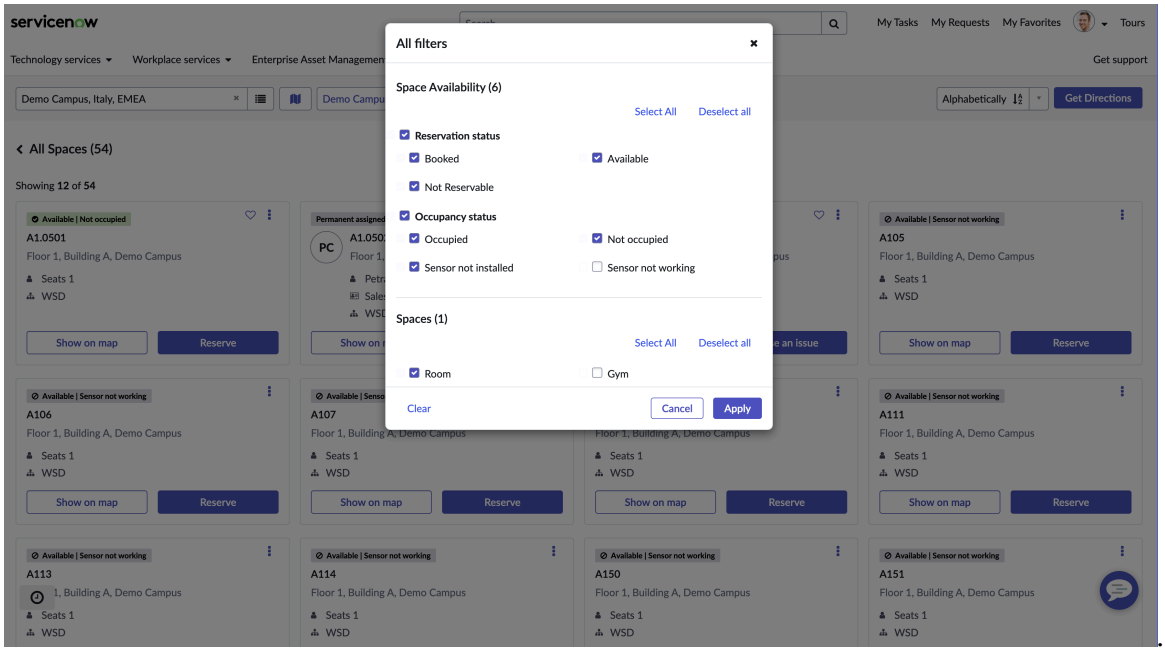

Select and filter any of the following options as required:

a. Select the **Reservation status** check box filter to view space availability on the map.

b. Select the required reservation status to filter spaces based on reservation data for a selected location.
For example, the following reservation states are displayed on the map for a selected space.

- Booked
- Available
- Not Reservable
- Currently booked

a. Select the **Occupancy status** check box to view the occupancy status for a selected space or a location on the map.

> **Note:** Occupancy states are only shown on the map if Workplace Connectors is configured for a selected location. Your administrator must also configure the map property **Show Reservation and/or Occupancy information on Location directory [sn_wsd_space_map.show_rsv_occ_data_loc_dir]**. For more information, see Configure map properties for Location Directory.

b. Select the following options as required:

- Occupied
- Not Occupied
- Sensor not installed
- Sensor not working

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- When both reservation and occupancy filters are applied, then spaces fulfilling both these conditions are shown.
- When only reservation or occupancy filters are applied then only reservation or occupancy states are displayed.
- Spaces on the map that are matching the filter conditions are highlighted.
- Spaces that don't fulfill the filter conditions or that don't have a filter applied are shown in white (polygon color).

a. Select the **Spaces** check box to filter selected space types on the Card view.

Note: Indoor Mapping place types are available as space types on the Location directory.

b. Select the required spaces.

For example, the following space types can be selected:

- Rooms
- Gym
- Cafe
- Phone booth
- Workspace/Desk
- Restroom-Men
- Restroom-Women
- Miscellaneous
- Elevator

13. Select **Apply** to apply the filters.
The selected filters are applied and the **Filter by label** shows filtered items as pills. For example: Booked, Available, and so on. Select **Clear All** to remove the filters.
14. To switch to Map view, select the toggle button ( ).
For more information, see Work with the Map view on the Location Directory.

Analytics and reporting solutions for Workplace Core

Monitor the progress of your workplace activities using the workplace dashboards and logs.

View your workplace floor plan update logs

After updating your workplace floor plan, you can view all changes made.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Safety Management** > **Administration** > **Floor Plan Update Logs**.
Logs appear for each floor plan updated with date and timestamps.
2. Select the **Created date** link to view the log record.
3. Select the **Floor** link to view the floor record.

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Workplace dashboards

Use the Workplace dashboards in Workplace Core to get a consolidated view of multiple workplace-related metrics so you can quickly check space utilization and monitor the progress of workplace tasks.

Real-time information provides insights to enable making decisions such as how many people in the workforce can be allowed at a given time into the office space. Track the workplace reservations, workplace cases and visitor registrations at any time.

Workplace manager dashboard

Use the Workplace manager dashboard to monitor the space allocation and workplace maintenance activities at your office campus. For any given day, you can view the details for available spaces, space reservations, pending workplace requests, arrival times for different locations, employee arrivals, and maintenance tasks.

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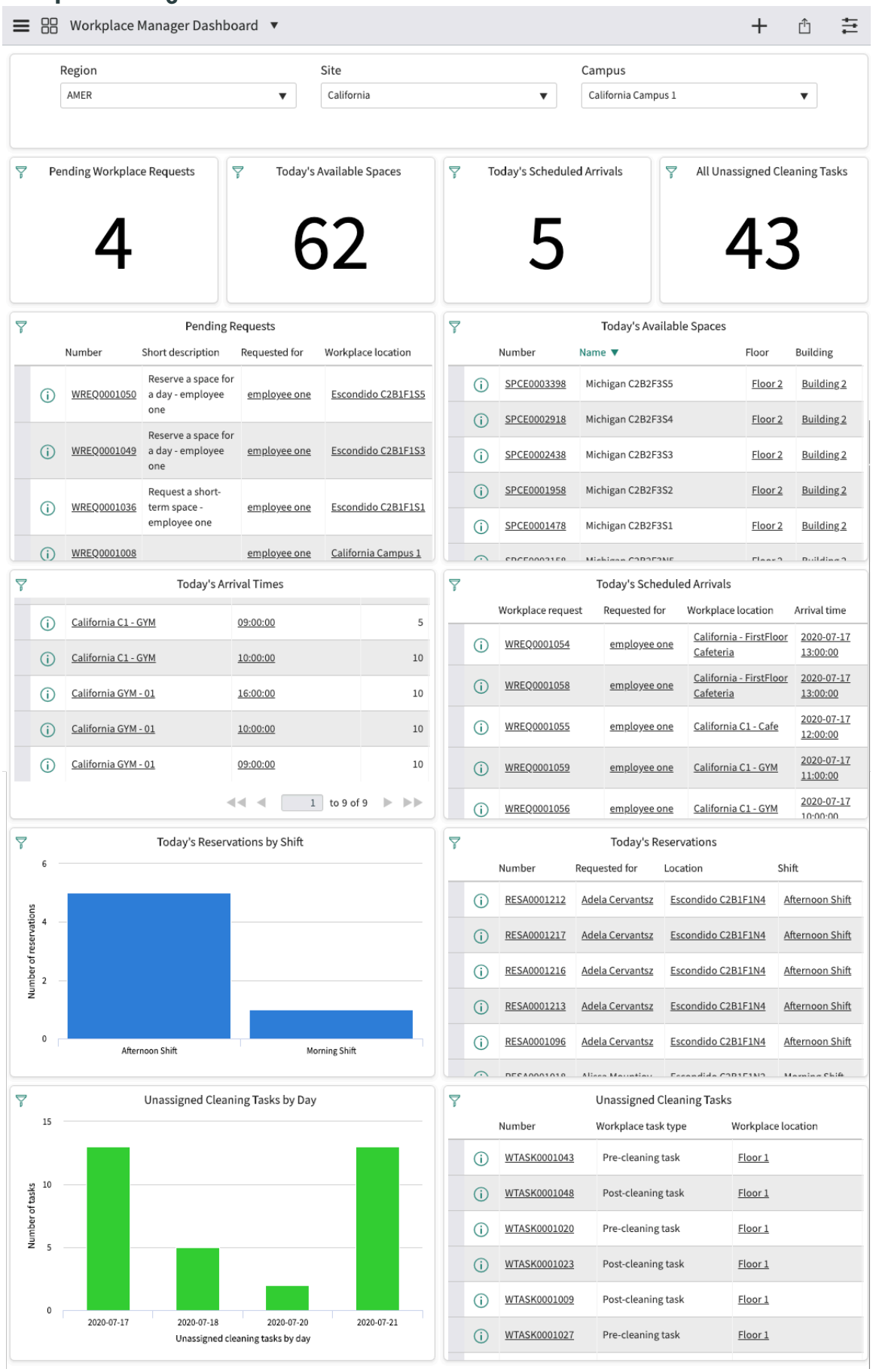
Workplace manager dashboard



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To access the Workplace Manager Dashboard, navigate to **Workplace Core** > **Workplace dashboards** > **Safety management**.

Selecting a region, site, and a campus in the Workplace Report Filter at the top of the dashboard displays reports for that campus.

End user and roles

Role required based on goal

End user and goal	Required role	Benefits
Workplace manager: Needs visibility into the real-time status of the workplace space availability, scheduled arrivals, and workplace maintenance.	sn_wsd_core.workplace_manager	• Review pending workplace requests • Monitor workplace reservation requests created by employees • Monitor arrival times • Estimate employee gatherings at common workplace locations using scheduled arrivals • Monitor the progress of workplace tasks

Data visualizations

Dashboard data

Title	Type	Description
Pending workplace requests	Single score	Number of workplace requests that are pending.
Today's available spaces	Single score	Number of active workspaces available for reservations today.
Today's scheduled arrivals	Single score	Number of employee arrivals scheduled for today for different locations on the campus.
All unassigned cleaning tasks	Single score	Number of active workplace tasks that are not assigned to anyone and not in the Closed state.
Pending requests	List	List of pending workplace requests for this campus.
Today's available spaces	List	List of active workspaces available for reservations today.

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Dashboard data (continued)

Title	Type	Description
Today's arrival times	List	List of arrival times scheduled for today for different locations on the campus.
Today's scheduled arrivals	List	List of employee arrivals scheduled for today for different locations on the campus.
Today's reservations by shift	Bar 	Number of workplace reservations for today grouped by their shifts.
Today's reservations	List	Number of workplace reservations for today.
Unassigned cleaning tasks by day	Trend 	Trend of the number of active cleaning tasks per day that are not assigned to anyone and not in the Closed state. The cleaning tasks in this report have a due date between today and the next seven days and include all task types such as planned, unplanned, and ad hoc.
Unassigned cleaning tasks	List	List of active workplace tasks that are not assigned to anyone and not in the Closed state.

Workplace dashboard in Workplace Service Portal

Use the Workplace Dashboard from Workplace Service Portal to visually analyze the available workspace capacity, space request and reservation trends, and monitor the maintenance tasks of your workplace. You can also reserve a space for an employee or create a workplace maintenance task directly from this Workplace Service Portal page.

To open the Workplace dashboard on the Workplace Service Portal, navigate to **Workplace Core** > **Dashboard**.

Important: Starting with Workplace Core (sn_wsd_core) version 2.2, or new customers, the **Dashboard** is removed from the Workplace Service Portal and Service Portal. Customers using Workplace Core version 2.1 and below can still access the dashboard after an upgrade.

Selecting a region and site in the filter at the top displays reports for available campuses in separate tabs.

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Workplace dashboard

Overview of California sites

AMER | California | Last updated Jul 06, 10:24pm

California Campus 2 | California Campus 1

California California Campus 1

Reserve a space

Today's capacity

60

Today's shifts

3

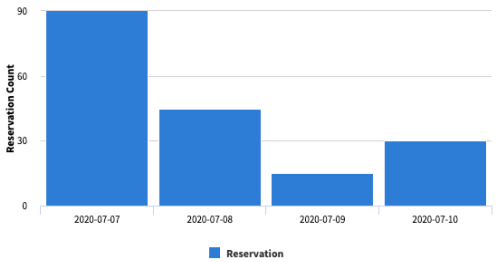
Today's reservable spaces

60

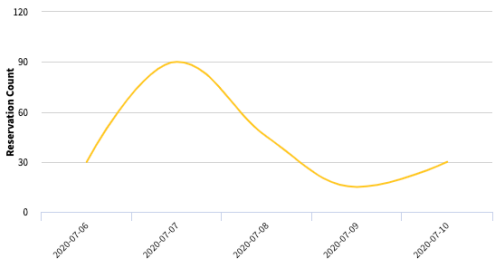
Today's reservations

90

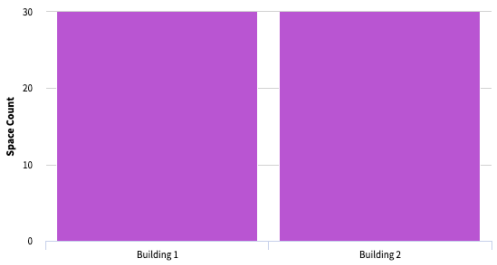
Reservations per day



Reserved spaces per day



Reservable spaces per building



Cleaning tasks for this campus

Add a task

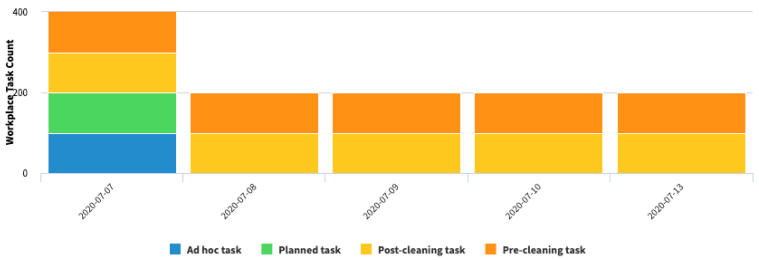
Unassigned cleaning tasks

10

Planned tasks

95

Cleaning tasks by day



Workplace requests for this campus

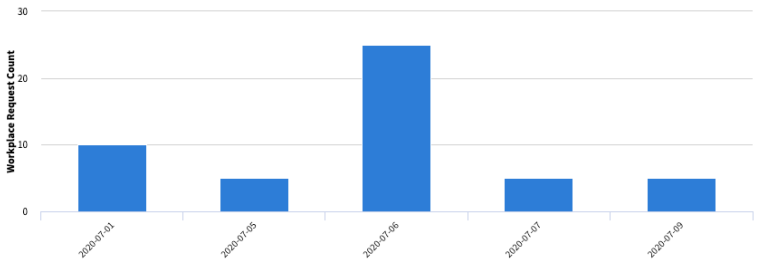
Pending workplace requests

7

Workplace requests created today

23

Workplace requests by day



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End user and roles

Required roles based on goal

End user and goal	Required role	Benefits
Workplace manager: Needs clear visibility into the real-time status of the workplace space utilization and cleaning activities for shifts.	sn_wsd_core.workplace_manager	• Can plan for the phased return of employees to the workplace after an emergency situation • Can monitor progress of workplace tasks for various office locations

Data visualizations

The data displayed in visualizations corresponds to the selected campus.

Dashboard data

Title	Type	Description
Today's capacity	Single score	Number of active workspaces available today.
Today's shifts	Single score	Number of shifts used in today's reservations.
Today's reservable spaces	Single score	Number of active workspaces available to reserve.
Today's reservations	Single score	Number of today's active reservations.
Reservations per day	Trend	Trend of the number of active reservations per day in the last seven days for which the end date is today or later.
Reserved spaces per day	Spline	Trend of the number of reserved workspaces per day for all reservations made in the last seven days that are active starting today or later.
Reservable spaces per building	Bar	Breakdown of active workspaces that are available to reserve for each building on the campus.
Cleaning tasks for this campus		
Unassigned cleaning tasks	Single score	Number of active workplace tasks that are not assigned to anyone and not in the Closed state.

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Dashboard data (continued)

Title	Type	Description
Planned tasks	Single score	Number of active planned workplace tasks that are not yet closed.
Cleaning tasks by day	Trend	Trend of the number of active cleaning tasks per day for which the due date is between today and the next seven days, or for which no due date is defined. The tasks in this report are grouped by the workplace task type.
Workplace requests for this campus		
Pending workplace requests	Single score	Number of workplace requests that are pending.
Workplace requests created today	Single score	Total number of workplace reservation requests created by the employees today.
Workplace requests by day	Trend	Trend of the number of workplace reservation requests created per day.

Related topics

Create workplace reservations for an employee

Create an ad hoc workplace task

Workplace Core references

Learn more about the role, tables and system properties installed with the Workplace Core application.

Components installed with Workplace Core

Several types of components are installed with installation of the Workplace Core application, including user roles, scheduled jobs, tables, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

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Roles

Roles installed with Workplace Core

Role title [name]	Description	Contains roles
Workplace admin [sn_wsd_core.admin]	• Sets up data about the workplace • Has complete access to the application	sn_wsd_core.workplace_manage
Workplace manager [sn_wsd_core.workplace_manager]	• Reserves spaces at the workplace • Links employees and shifts to spaces • Manages planned maintenance tasks	• sn_wsd_core.workplace_expos • schedule_admin • template_editor_global
Workplace exposure analyst [sn_wsd_core.workplace_exposure_analyst]	Identifies potentially exposed employees in the ServiceNow® Emergency Exposure Management application using workspace reservations.	None
Workplace shift owner [sn_wsd_core.workplace_shift_owner]	• Has edit access to the shifts that they own. • Has edit access to details such as shift schedules, associated users, and spaces of owned shifts. • Has read-only access to workplace tasks of owned shifts. • Can view workspace requests and reservations for owned shifts	None
Workplace user [sn_wsd_core.workplace_user]	• Requests area or workspace reservations from the Workplace Service Portal or the Now® Mobile app • Schedules arrival to workplace locations using the Workplace Service Portal or the Now® Mobile app	None

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Roles installed with Workplace Core (continued)

Role title [name]	Description	Contains roles
	Note: From Workplace Core v1.3.2 onwards, this role is required for employees to request reservations from Workplace Service Portal.	
Workplace core writer [sn_wsd_core.task_writer]	• Create, read, update, and delete Workplace Tasks. • Read Task templates.	sn_wsd_core.task_reader
Workplace core reader [sn_wsd_core.task_reader]	Has permission to read all workplace tasks.	None
Workplace knowledge base writer [sn_wsd_core.kb_writer]	• Create, view, publish, and update knowledge base articles. • Retire and republish knowledge base articles.	None
Workplace entity reader [sn_wsd_core.workplace_entity_reader]	Has permission to read the Workplace Entity [sn_wsd_core_workplace_entity] and Entity Type [sn_wsd_core_entity_type] tables. This role is required by workplace users to create any requests based on Workplace Entities.	None
Workplace entity writer sn_wsd_core.workplace_entity_writer	Has permissions to create and edit records in the Workplace Entity [sn_wsd_core_workplace_entity] and Entity Type [sn_wsd_core_entity_type] tables.	sn_wsd_core.workplace_entity_r
Workplace core neighborhood reader sn_wsd_core_neighborhood_reader	Any user with workplace manager role and space planner role has permission to read neighborhood.	None
Workplace core neighborhood writer sn_wsd_core_neighborhood_writer	Any user with workplace manager role and space planner role has permission to read and write neighborhood.	None

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Tables

Tables installed with Workplace Core

Table	Description
User Space Suggestions [sn_wsd_core_user_space_suggestions]	Cache table for user preferred or recommended spaces. Has list view fields (User, Building, and Suggestions) **Note:** The sn_wsd_concierge.admin role can read, create, edit, and delete records in the table in both form and list views.The sn_wsd_core.workplace_user has READ configuration used when receiving suggestions. Users with sn_wsd_core.workplace_user role can only see the records created for them, and the records are read-only. For more information, see User Space Suggestions.
Space Suggestions	Cache table for space suggestions for employees. The suggestion type field contains the drop down in the form view fields (Location, Favorites, Past and Future reservations, Collaborator location and Standard services). Weight should be a positive number (integer). If a negative number is entered and saved, application shows an error message. For more information, see Space suggestion Configuration. **Note:** The sn_wsd_concierge.admin role can read, create, edit, and delete records in the table in both form and list views.The sn_wsd_core.workplace_user has READ configuration used when receiving suggestions. Users with sn_wsd_core.workplace_user role can only see the records created for them, and the records are read-only.
Area [sn_wsd_core_area]	Stores the list of areas on office floors.
Arrival Entry [sn_wsd_core_arrival_entry]	Stores the list of scheduled arrival entries of the employees.
Arrival Schedule [sn_wsd_core_arrival_schedule]	Store the list of scheduled arrival intervals created by the workplace manager.

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Tables installed with Workplace Core (continued)

Table	Description
Building [sn_wsd_core_building]	Stores the list of office buildings.
Campus [sn_wsd_core_campus]	Stores the list of office campuses.
Floor [sn_wsd_core_floor]	Stores the list of office floors.
Html Signing Template [sn_wsd_core_html_signing_template]	Stores the templates to sign off on a planned task and generate a PDF.
Location Shift [sn_wsd_core_m2m_location_shift]	Stores the relationship between shifts and workspace locations.
Location Migration Configuration sn_wsd_core_location_migration	Stores information about all the location migration configurations.
Planned Task Definition [sn_wsd_core_planned_task_def]	Stores the planned task definitions that workplace managers create for workplace tasks.
QR Code [sn_wsd_core_qr]	Stores information about all the QR codes generated in the application.
Region [sn_wsd_core_region]	Stores the list of regions of workplace locations.
Room [sn_wsd_core_room]	Stores information about all the rooms.
Reservation [sn_wsd_core_reservation]	Stores the relationship between shifts, employees, and workspaces.
Shift [sn_wsd_core_shift]	Stores the list of shifts.
Site [sn_wsd_core_site]	Stores the list of sites of the organization.
Space [sn_wsd_core_space]	Stores the list of workspaces of the organization.

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Tables installed with Workplace Core (continued)

Table	Description
Space Type [sn_wsd_core_space_type]	Stores the list of space type configuration created by the workplace manager.
Space Staging [sn_wsd_core_space_staging]	Acts as an interim placeholder table for imported data about spaces.
User Shift [sn_wsd_core_m2m_user_shift]	Stores the relationship between shifts and employees. For existing users who are upgrading from the first version of the app, ensure that you have the **User** field as the display value. For more information, see Select a field as the table display value.
User Workplace Profile [sn_wsd_core_workplace_profile]	Stores the relationship between employees and their designated workspaces.
Workplace Safety User [sn_wsd_core_workplace_user]	Stores information about all the Workplace Service Delivery users.
Workplace Client Role Rule [sn_wsd_core_client_role_rule]	Stores the workplace client role assignment rules created for employees.
Workplace Location [sn_wsd_core_workplace_location]	Parent table for all workspace entity tables such as Regions, Sites, Campuses, Buildings, Floors, Areas, and Spaces.
Workplace Request [sn_wsd_core_workplace_request]	Stores the workplace reservation requests created by employees.
Workplace Task [sn_wsd_core_workplace_task]	Stores all the workplace tasks created for shifts. If you are upgrading from version 1.1.1 or earlier of the app, ensure that the **Default Value** field is empty for the workplace_task_type column of this table. For more information on how to modify the default display value of a table column, see Specify a default field value.
Workplace rooms [sn_wsd_core_room]	Extends the Space [sn_wsd_core_space] table. It holds the reservable items of a room that are available to reserve.
Workplace Performer Criteria	Extends the Application file table. Stores information about all the performer criteria

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Tables installed with Workplace Core (continued)

Table	Description
[sn_wsd_core_performer_criteria]	created in the application. The performer criteria stores the list of users who are eligible to perform approval-related actions.
Workplace Approval Definition [sn_wsd_core_approval_definition]	Extends the Application file table. Stores information about all the approval definitions. The tables store information such as which entities require approval.
Workplace Approval Configuration [sn_wsd_core_approval_configuration]	Extends the Application file table. Stores information about all the workplace approval configurations.
Workplace space type [sn_wsd_core_space_type]	Stores information about Workplace space types that are referenced to Indoor Mapping place types for indoor navigation.
Workplace core neighborhood [sn_wsd_core_neighborhood]	Stores information about neighborhood.
Workplace core neighborhood space association [sn_wsd_core_neighborhood_m2m_space]	Stores information about neighborhood space association.
Workplace core neighborhood space user assignment [sn_wsd_core_neighborhood_user_assignment]	Stores information about neighborhood user assignment rule.
Workplace Card Configuration [sn_wsd_core_card_configuration]	Stores configurations for the cards that are used across Workplace applications.

Properties installed with Workplace Core

Customize the properties available with the Workplace Core.

These properties are available for Workplace Core.

Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Core

Property	Description
sn_wsd_core.AUTO_ASSIGN_LOCATION	Enables auto-assignment of workspaces when employees make workspace reservation requests. • Type: true|false • Default value: false

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Properties for Workplace Core (continued)

Property	Description
	Note: Once this feature is enabled, the fields related to workplace locations such as **Area**, **Space preference**, and **Space** do not appear on the Workspace Reservation form. Enable this feature only if all employees have a designated workspace in their user profiles in the User Workplace Profile [sn_wsd_core_workplace_profile] table. For more information, see Mapping employees to their designated workspaces.
sn_wsd_core.CANCEL_RES_BUILDING	Determines whether the reservations made for spaces should be canceled based on the value of the **Is reservable** field. • Type: true|false • Default value: false If this property is set to **true**, then the application cancels all the workspace reservations that are made for the areas and spaces of those buildings or floors for which the value of the **Is reservable** field is set to **false**.
sn_wsd_core.CLEANING_TASK_MAX_DURATION	Determines the duration (in days) by when you want the pre-cleaning and post-cleaning tasks to be executed. • Type: Integer • Default value: 7
sn_wsd_core.floor_plan.portal.show_non_reservables	Determines whether non-reservable workspaces appear in grey on the floor plan in the Workplace Service Portal. • Type: true|false • Default value: false **Note:** Changing this value to true can negatively affect performance.
sn_wsd_core.floor_plan.portal.show_reservation_details	Determines whether reservation details appear when users point to booked spaces on the floor plan in Workplace Service Portal.

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Properties for Workplace Core (continued)

Property	Description
	• Type: true|false • Default value: false
sn_wsd_core.REQUEST_MAX_DURATION	Determines the maximum number of days that an employee can request a space reservation for at one time. This property is applicable when an employee requests a space reservation for multiple days. • Type: Integer • Default value: 7
sn_wsd_core.show_book_uber	Determines the visibility of the **Book Uber** button on the Now® Mobile app. If this property is set to **true**, then employees can select **Book Uber** from their confirmed reservations on their mobile devices. Users are redirected to the Uber mobile app. • Type: true|false • Default value: false
sn_wsd_core.wsd_inbound_email	Checks for emails that are received for the ServiceNow® Workplace Service Delivery and Workplace Case Management applications. This property has been renamed from the *sn_wsd_case.wsd_inbound_email* property in Workplace Case Management version 1.0.1. This property is available only for Workplace Core 2.0.3 or later. • Type: String • Default value: askwsd@example.com • Location: System Property [sys_properties] table
sn_wsd_core.floor_transform_map	Enables you to configure customized transform maps. • Type: string • Default value: 2528fbf70f201010dbc3d2d92f767e04
sn_wsd_core.ENABLE_RSV_CHECK_IN	Enables reservation check-in and check-out via email.

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Properties for Workplace Core (continued)

Property	Description
	If this property is set to **true**, then employees can check in and check out a reservation. • Type: true|false • Default value: false
sn_wsd_core.dfx.rebuild_cache.max_floors	Enables you to specify the maximum number of floors to build for an entity cache at any time. • Type: Integer • Default value: 20
sn_wsd_core.CANCEL_RES_LOCATION	Enables you to cancel all future reservations made on a location level. Set the **Is reservable** field to **false** for the location. • Type: true|false • Default value: false
sn_wsd_core.ALLOW_USER_SHIFT_FILTERING	Enables a user to create shift-based reservations only if the user is part of that shift. • Type: true|false • Default value: false
sn_wsd_core.ALLOW_AVAILABILITY_FILTERING	Displays only the available buildings and floors in the reservation record producers. • Type: true|false • Default value: false **Note:** If the property is set to **true**, then the selected workplace locations take a longer time to load.
sn_wsd_core.MULTI_DAY_AVAILABILITY	Displays only the available areas and spaces in multi-day reservation record producers. • Type: true|false • Default value: false **Note:** If the property is set to **true**, then the selected workplace locations take a longer time to load.

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Properties for Workplace Core (continued)

Property	Description
ARRIVAL_REQUEST_MAX_FUTURE_DAYS	Enables you to specify the maximum number of days in the future until when employees can schedule their arrival. • Type: Integer • Default value: 7
sn_wsd_core.external_id_generator.field	Enables you to specify the field that must be used for the external id. • Type: string • Default value: name
sn_wsd_core.external_id_generator.max_buildings	Enables you to specify the maximum number of buildings that must generate ids in a single selection. • Type: integer • Default value: 50
sn_wsd_core.external_id_generator.max_spaces	Enables you to specify the maximum number of spaces that must generate ids in a single selection. • Type: integer • Default value: 5000
sn_wsd_core.external_id_generator.stagger	Enables you to specify the amount of time to stagger processing external id generation (in seconds). • Type: integer • Default value: 300
sn_wsd_core.max_buildings_delete	Enables you to specify the maximum number of buildings that must be deleted when the **Delete Workplace Locations** scheduled job is ran. • Type: integer • Default value: 100
sn_wsd_core.max_spaces_delete	Enables you to specify the maximum number of spaces that must be deleted when the **Delete Workplace Locations** scheduled job is ran.

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Properties for Workplace Core (continued)

Property	Description
	• Type: integer • Default value: 1000
sn_wsd_core.ENABLE_LOCATION_PRIVACY	Enables you to set location privacy preference. You can apply privacy on workplace profiles and workplace reservations. For more information, refer to Location privacy settings and impact. • Type: choice list • Default value: None
sn_wsd_core.OVERRIDE_RESERVATION_PRIVACY	Enables you to let employees override the location privacy on a reservation. For more information, refer to Location privacy settings and impact. • Type: choice list • Default value: no
sn_wsd_core.PRIVACY_INFORM_EMPLOYEE	Enables you to inform employees when privacy is applied on a workplace profile or reserved spaces. For more information, refer to Location privacy settings and impact. • Type: true|false • Default value: false
sn_wsd_core.ALLOCATION_TYPE	Enables you to specify the allocation type based on which the spaces must be retrieved and displayed to users while searching for spaces to reserve, during scenario planning, and more. • Type: choice list • Default value: none By default the following allocation types are provided with the applications: • Cost center = cost_center • Department = department • Workplace entity = workplace_entity

Workplace Profile Location Assignment form

The location assignment form helps you assign a location or a neighborhood to a workplace profile.

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Workplace Profile Location Assignment form

Field	Description
Workplace profile	Workplace profile record that the location must be assigned to. A workplace profile can have multiple location assignments. For more information about workplace profiles, see Map designated workspaces to user profiles.
Profile type	Type of assignment you want to set for the workplace profile. Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.
Neighborhood	Neighborhood record that you want to assign to the profile. This field appears only if the **Profile type** is set to Neighborhood assignment.
Workplace location	Workplace location record that you want to assign to the profile. **Note:** The Workplace location field is required for neighborhood assignment. Select the required building, floor, or space that you want to assign to the profile.
Schedule plan	Schedule plan that you want to use to assign workplace locations to the profile. For more information about schedule plans, see Schedule Planning.
Active	Option to activate the record.
Is primary	Option to specify if the assigned workplace location is the primary location for the profile. A workplace profile can only be assigned one primary location. For more information about setting a primary location, see Set the primary location of a workplace profile.
Reason for anomaly	Anomaly that occurred due to a mismatch in the allocation or assignment type. For more information about anomalies, see Workplace location assignment anomaly types. This field is automatically calculated based on the workplace location and profile records.
Enable employee location privacy	Option to specify whether employees can hide their location assignments from other users.

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Workplace Profile Location Assignment form (continued)

Field	Description
Source	Source from which the location assignment record was created. This field is automatically generated and is only visible in the Workplace Profile Location Assignments related list.

Workplace location assignment anomaly types

Anomalies occur when there's a mismatch in the allocation or assignment of a workplace profile and workplace location.

Anomaly types

Reason for anomaly	Description
No anomaly	There's no anomaly.
Assignment type mismatch	The **Assignment type** of both the user profile and the **Workplace location** to which the user is assigned doesn't match.
Allocation mismatch	The allocation of both the user profile and the **Workplace location** to which the user is assigned doesn't match. The allocation mismatch considers the allocation set in the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] system property. Time-bound allocations follow only the start date and end date of the allocation, which are set in the system time zone. For more information, see Allocate a cost center, department, or workplace entity.
Assignment type and allocation mismatch	The **Assignment type** and the allocation of both the user profile and the **Workplace location** to which the user is assigned doesn't match.
Restricted neighborhood assignment mismatch	This anomaly arises due to any one of the following mismatches: • When a user profile is assigned to a space that is assigned to a restricted neighborhood but the user profile isn't assigned to that restricted neighborhood. • When a user profile is assigned to a space that is not assigned to the restricted neighborhood but the user profile is assigned to that neighborhood.
Space not part of neighborhood	The assigned **Workplace location** of the user is not part of the specified **Neighborhood**.

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Reserve a space form

The reserve a space form helps you select the location and duration of your reservation.

Reserve a space form

Field	Description
Region	Region of your office location.
Site	Location of your office.
Campus	Campus of your office building.
Building	Office building that you want to return to.
On-site date	Date on which you want access to the workplace.
Shift	The shift schedule during which you want to visit the office. Only the shifts available for the selected location and date range are displayed. Only the shifts that you are part of are displayed. This depends on the system properties which were configured by your organization.
Shift detail	Details of the shift that you selected. The shift detail is auto-filled based on your shift selection.
Start date/time	Date and time from when you would access the workplace. This field is visible if you selected **Reserve a space for a day**.
End date/time	Date and time until when you would access the workplace. This field is visible if you selected **Reserve a space for a day**.
Floor	Floor of the area or space that you want to access.

Card Configuration examples

Add buttons, fields, and sections to the workplace card configuration.

Note: The following examples are to customize the card configurations in Workplace Core. For more information about configuring the cards, see Configure a workplace card.

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Customizing the card style

Navigate to **All** > **Service Portal** > **CSS**, then customize the `wsdConfigurableCard` record based on your preference. You can override the styles based on the type of card you want to customize. For example:

```
/* Customizing the profile image size for the user card */
.wsdConfigurableUserCard {
    .profile-image {
        width: 100px;
        height: 100px;
        border-radius: 35px;
    }
}
```

Adding a section

In the template (macro) XML code, add a `<div>` element where you want to create a section, then include other elements inside the `<div>`. For example:

```
<!-- The following section is to add a phone number -->
<div class="section support-section" ng-if="data.contact">
                <div class="section-label">

  <div class="label-text">{{ translations.space.supportSectionTitle }}</
div>
                </div>
                <!-- The following link specifies the phone number fetched from the data -->
                <a href="tel:{{ data.phone }}" class="section-content section-content-text">
                    {{ data.phone }}
                </a>
            </div>

            <!-- The following div inserts a divider between sections -->
            <div class="divider" ng-if="mustDisplayDivider()"></div>

            <!-- The following section is to add extra services -->
            <div class="section book-services-section" ng-if="data.link">
                <div class="section-label">

  <div class="label-text">{{ translations.space.bookServicesSectionTitl
e }}</div>
                </div>
                <!-- The following link specifies the services link fetched from the data -->
                <a href="{{ data.link }}" class="section-content section-content-link">
                    {{ data.link }}
                </a>
            </div>
```

Adding a button

Add the logic for the button in the `WSDConfigurableCardDataInjector` script include. Make sure to add the logic inside the `extendCardsData` method. For example:

```
/* Adding functionality for a custom button */
extendCardsData: function(cards) {
    cards.forEach(function(card) {
        if (card.type === 'space') {
```

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```
            card.data.actions.secondary.push({
                label: 'Custom Action',
                id: 'custom_action',
                action: 'custom_action',
                isDisabled: false,
                type: 'secondary'
            });
        }
    }
});
```

Note: Buttons are displayed in the `Primary action buttons` section of the card.

Adding a field

In the template (macro) XML code, add a `<div>` element in the section that requires a new field, then add the logic to populate the field value in the `WSDConfigurableCardDataInjector` script include. For example:

```
<!-- Adding a new row with a new field -->
<div class="info-row" ng-if="data.usable_size_sq_meter">
<div class="info-icon">
<i class="fa fa-arrows-alt"></i>
</div>
<div class="info-text">{{ data.usable_size_sq_meter }}m square</div>
</div>
```

```
/* Custom logic to populate the field value */
cards.forEach( function(card) {
    if (card.type ==='space') {
        var spaceGr.get(card.data.sysId)) {
            card.data.usable_size_sq_meter =
 spaceGr.getValue('usable_size_sq_meter');
        }
    }
});
```

Adding custom logic for a card

You can add custom logic for a card in the `WSDConfigurableCardDataInjector` script include.

In the `extendCardsData` method, add the custom logic to provide data for the new section to the card. For example, to modify the card title based on a building name:

```
extendCardsData: function(cards) {
    /* Modify card title based on the building display name */
    cards.forEach(function(card) {
        if (card.data.building && card.data.building.displayValue
 === 'HQ') {
        card.data.title = '[HQ]' + card.data.title;
        }
    });
    return cards;
},
```

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Hiding an element

In the template (macro) XML code, delete the XML tag for the section that you want to remove, or surround it in a comment block. For example:

```
<!-- The following section is in a comment block, therefore hidden on the card -->
<!-- <div class="info-row" ng-if="data.usable_size_sq_meter">
<div class="info-icon">
<i class="fa fa-arrows-alt"></i>
</div>
<div class="info-text">{{ data.usable_size_sq_meter }}m square</div>
</div> -->
```

After hiding the element, make sure that you remove the custom logic, or surround it in a comment block. For example:

```
/* The following method is in a comment block, therefore is not run on the card */
/* cards.forEach( function(card) {
   if (card.type ===’space') {
      var spaceGr.get(card.data.sysId)) {
         card.data.usable_size_sq_meter = spaceGr.getValue('usable_size_sq_meter');
      }
   }
}); */
```

Workplace Reservation Management

The ServiceNow® Workplace Reservation Management application makes it easier for employees to reserve meeting rooms, conference rooms, desks, and any reservable workplace service from the Service Portal.

Get started

Explore Learn about Workplace Reservation Management concepts and features.	**Configure** Configure the application and setup the reservable modules and related settings for employees to make a reservation.	**Request** Make a single, recurring, or a group reservation. Invite colleagues and visitors.
Manage Manage workplace reservations and approvals.	**Analytics and Reporting Solutions** Coordinate work and improve processes with dashboards and reports.	**Reference** Get details about components like fields, tables, and properties.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Workplace Reservation Management

Workplace Reservation Management provides one unified interface for employees to reserve desks, meeting rooms, parking spots, workplace equipments, services, and collaboration spaces.

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servicenow

Smarter Workplace Reservations with ServiceNow

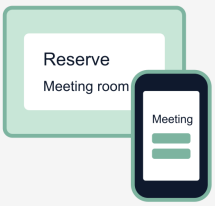


The Challenge

- **Wasted time finding spaces**
- **Double bookings and conflicts**
- **No visibility into workplace usage**

Solution

One intuitive app to reserve **desks, meeting rooms, and** workplace services—anytime, anywhere



For Employees

- **Reserve instantly** desks, rooms, services
- **Browse via floor maps,** favorites, or near colleague
- **Add virtual meeting** links (Teams, Zoom)
- **Track and approve** reservations

For Managers Admins

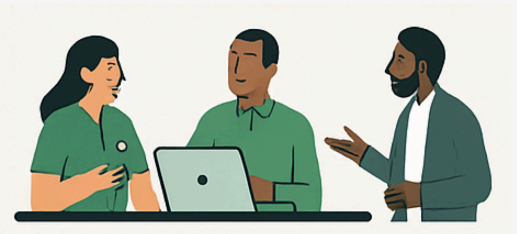
- **Configure reservable modules**
- **Enable shift group reservations** Add services like catering or AV
- **Generate QR codes for check-in**

Integrations Automation

- **Seamlessly integrated** with tools you already use
- **Get insights into space usage. Optimize layouts** Reduce costs

Integrations Automation

zoom Outlook Google Calendar



With ServiceNow Workplace Reservation Management

You are not just booking spaces, you are creating smarter connections.

Workplace Reservation Management provides flexibility to employees as to where to work from, where to meet, and how to collaborate with team members without wasting time or searching

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for an open desk or room. Workplace Reservation Management provides a single, intuitive application that makes it easy for employees to reserve desks, meeting rooms, conference spaces, or any workplace services. Employees can book a desk near their teammate or colleagues or plan a recurring meeting across multiple buildings.

Employees can create single, recurring, or group reservations, invite colleagues and visitors, add virtual meeting links, and even download iCalendar invites to sync with their schedules.

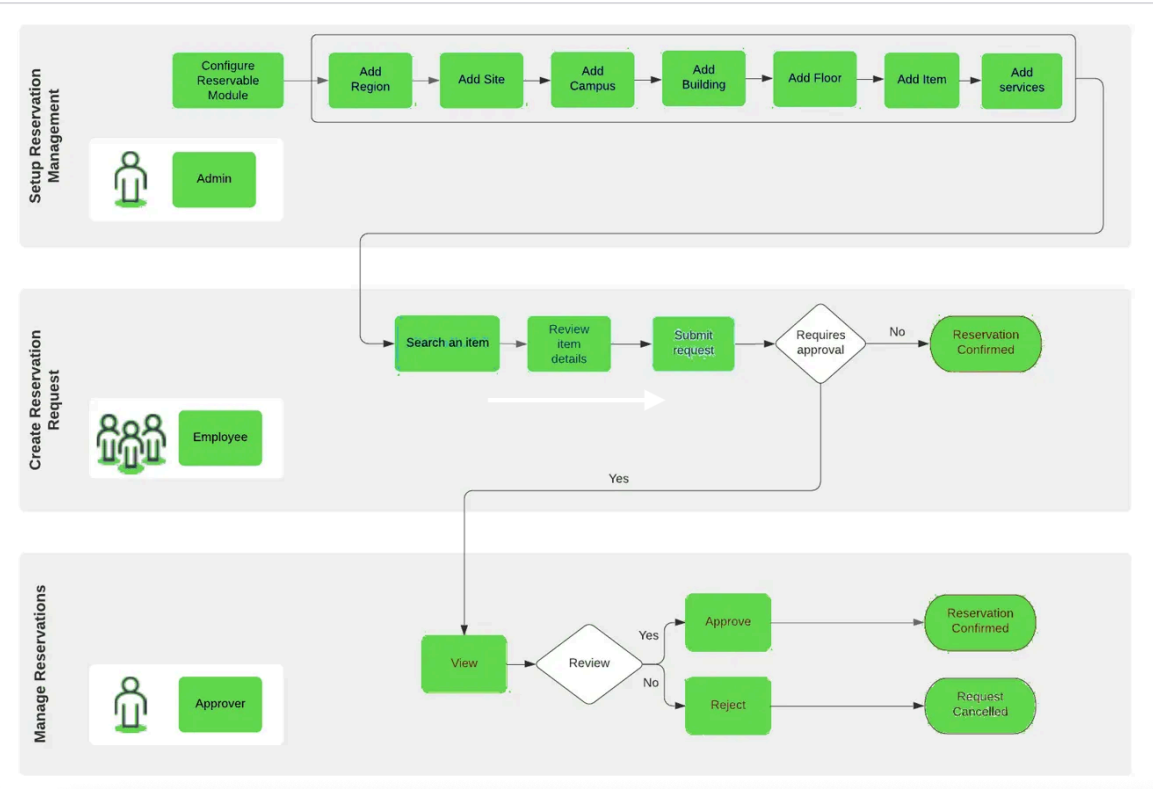
Workplace administrators can configure Reservable Modules, assign spaces, and add standard or flexible services like catering, seating arrangement, AV equipments, and so on. They can enable approvals, manage shift-based or group bookings, and track reservations.

Workplace Reservation Management integrates seamlessly with Microsoft Teams, Microsoft, Zoom, Microsoft Outlook, and Calendars. Reservation conflicts are auto-resolved, approvals are streamlined, and employees get real-time notifications.

Workplace and facility managers get actionable insights through dashboards, analytics and reporting. They can optimize space usage, reduce costs, and improve the workplace experience for everyone. With Workplace Reservation Management, workplace administrators can build smarter and connected workplace experiences.

Workplace Reservation Management provides a modern, intuitive reservation experience for employees, while giving workplace and facility managers the control and insights they need to optimize the workplace.

The following diagram explains the reservation workflow:



Simplify reservations with self-service for employees

Employees can perform the following using Workplace Reservation Management:

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- Find and reserve spaces instantly. Reserve desks, meeting rooms, conference rooms, parking spots, or even services like catering, seating arrangement, projectors, and so on.
- Opt to reserve a space for an hour, for an entire day, across multiple days, or even multiple buildings.
- View the availability of a workplace item for a day using Map, Card, or Schedule options.
- View details of workplace items such as capacity, location, layout, and services available.
- Browse locations on floor maps and make reservations or raise a workplace issues based on space availability.
- Book recurring meetings with automatic conflict resolution so that workplace schedules stay on track.
- Add multiple buildings to a single reservation.
- Make reservations and browse near colleagues for better and efficient collaboration, browse by neighborhood or by an area.
- Set your In-office presence days on Workplace Presence Dashboard using Workplace Concierge. Change your remote days, visiting another office, or In-Office days as required using the presence dashboard. Match your In-office days with your colleagues' In-office days for better collaboration and productivity.
- Invite attendees and external visitors to a meeting invite. Employees can add invitees or external visitors to their reservations and include virtual meeting links for Microsoft Teams or Zoom.
- Share reservation details using iCalendar so that everyone in a team stays aligned.
- Set favorites so their preferred spaces appear first every time they try to make a reservation.
- Make reservations using a Kiosk Map.
- Create a reservation for yourself or on behalf of someone else.
- View, update, or cancel your reservations or reservations created for others.
- While reserving a room for a meeting, specify the meeting type as private for confidential meetings.
- Request extra services along with a reservation such as catering, seating arrangements, projectors or stationery supply.
- Reserve a workplace near a co-worker.
- Share your reservation details with others.
- Create a group reservation and assign workplaces to different employees in a single reservation.
- Download the iCalendar to download the reservation details and save it to your calendar.
- Set a workplace as favorite. The favorite space is displayed first when you search for workplaces to make a reservation,
- Create a virtual meeting link of the reservation to enable invitees outside the office to join.
- Invitee attendees such as co-workers or even external workers to attend a meeting.
- Create a virtual meeting link of the reservation to enable invitees outside the office to join.
- Invitee attendees such as co-workers or even external workers to attend a meeting.
- Set location privacy preferences on an organization or a building level.
- Integration of Workplace Reservation Management with Workplace Concierge provides employees with real-time insights to optimize their on-site presence in the workplace with their

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co-workers, improving team collaboration and learning. By using personalized suggestions, employees are guided to the best workspace when they plan to visit the office or travel to another office.

For more information, see Create a reservation.

Enhanced workplace monitoring, compliance, and visibility for workplace administrators and facility managers

Workplace Reservation Management allows workplace administrators and facility managers to monitor space allocations and utilization across a workplace. They can monitor space utilization. It provides them with greater visibility and monitoring capabilities.

- Configure reservable modules to group similar workplace items—like desks or meeting rooms.
- Set approval policies to match organizational needs, so reservations follow the right workflows.
- Enable shift-based reservations for workplaces with staggered schedules.
- Allow group reservations, letting one manager book for an entire team.
- Add standard or flexible services—everything from projectors to catering—to make meetings more productive.
- Generate QR codes for easy check-ins, displayed at reservable locations.
- Configure Outlook Add-in, Advanced Reservation, Kiosk Reservation, Workplace Experience, Quick Reservation capabilities, and so on.
- Display seat assignments on floor maps and enable automatic check-ins for no-hassle reservations.
- Configure the Reservations widget to display different types of reservable items which employees can reserve.
- Configure a wide range of standard services that are available with the reservable items.
- Configure reservable modules to group similar types of reservable items. Activate/deactivate a module to control its availability for the employees to reserve.
- Indicate if an approval is required. Doing so triggers an approval request whenever an employee tries to reserve any reservable item of the reservable module.
- Enable shift-based reservation on a reservable module. An employee can make a shift reservation for a workplace item of that reservable module.
- Enable group reservation on a reservable module. An employee or a manager can reserve multiple places for different employees in a single group reservation.
- Enable iCalendar generation so that employees can add the reservation to their calendar.
- Enable employees to invite attendees such as co-workers or external visitors.
- Configure virtual meeting providers to enable employees to share a virtual meeting link along with their reservation.
- Enable multi-building reservation.
- Enable browse by neighborhood.

For more information, see Configure a reservable module.

Smarter Integrations and Automation

Employees can create reservations using:

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- Microsoft Teams and Zoom
- Workplace Calendar Synchronization with Microsoft Outlook or Google Calendar, ensuring reservations show up in personal schedules.
- iCalendar downloads so employees can stay aligned across devices.

  When reservation conflicts arise (such as two employees booking the same spac), the system uses the proximity logic to automatically find the closest available alternative.

  For more information, see Manage Workplace Reservations for Microsoft Outlook Add-in.

Data-driven workplace optimization

Workplace Reservation Management isn't just about booking—it's about improving the workplace experience. With built-in dashboards and reporting, workplace administrators and facility managers can perform the following:

- Track reservation patterns over a period of time.
- Understand space utilization across buildings, floors, and areas.
- Identify underused spaces and optimize layouts.
- Support smarter planning for hybrid work and future growth.

As a Workplace Reservation Management manager, you can:

- Manage reservations created by employees. You can view, update, and approve or reject the reservations created by the employees based on your organization's guidelines.
- Generate reports to track the reservation requests over time.
- Add reservable purposes to a workplace item.
- Assign neighborhood spaces to an area.
- Assign spaces to an area
- Assign spaces to a neighborhood

For more information, see Analytics and Reporting Solutions for Workplace Reservation Management.

Workplace Reservation Event planner

The Workplace Reservation Event Planner enables you to track your organization's reservations from a single workspace in Workplace Central. The Event planner dashboard is available to both Reservation planner and Reservation viewer roles. As a reservation planner, manage the reservations on behalf of your employees. View reservation details, optimize reservations, and manage multiple workplace reservations using the schedule view.

For more information, refer to Event Planner.

Make a reservation

The 'Make a reservation' form also referred to as the Reservation portal, is a central location for reserving workplace items, such as meeting rooms and desks. You can also view and manage your reservations. After a reservation request is confirmed, you're notified about the reservation details.

You can reserve a workplace item for any period between 00:00 to 23:59 (midnight to 11:59 p.m.) on the same day. For example, you can make a reservation until anytime before 23:59. If the reservation continues to another day, you must create a separate reservation.

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You can make a reservation from the Workplace Reservation Management application and the Workplace Service Portal.

- To open the 'Make a reservation' form from the application, navigate to **Workplace Reservation Management** > **New Reservation**.
- To open the 'Make a reservation' form from the Workplace Service Portal, perform the following actions:
  1. Select **Reservations** > **Make a reservation**.
  2. Select **Make a reservation** directly on the home page.
  3. Select **New general reservation** from the Workplace services catalog.

The 'Make a reservation' form enables you to do the following:

- View workplace items such as meeting rooms and desks for your location or for a different location.
- View the availability of a meeting room or desk before making a reservation request.
- Use workplace floor maps to find and reserve a space within Workplace Core. To view the maps in the Location directory and within Workplace Reservation Management, use Mappedin and Indoor Mapping. For more information on how to use floor maps, see Workplace Space Mapping.
- Check for any standard services that are available with workplace items, such as whiteboards, seating capacity, and projector.
- Reserve a workplace item for yourself or on behalf of someone else.
- Reserve multiple buildings for a single reservation. For more information, see Create multi-building reservations.
- View the details of the reservations that you've created.
- Modify or cancel the reservations that you've created.
- Share reservation details with others.
- Browse workplace locations near a person and make a reservation.
- Reserve multiple workplace locations in a single reservation.
- Make a group reservation for different users in a single reservation. You can manage the group reservation in the parent reservation.
- Download an iCalendar of a reservation to add the reservation to your calendar.

You can also use the Virtual Agent chat support on the Workplace Service Portal to make a reservation and view your reservation details. The chat support enables you to do the following:

- Create a reservation for a location.
- View the reservations that you created on the current day.
- See when your reservation will start or happen.
- Cancel a reservation.

Recurring reservations

When you reserve a workplace item for a recurring event, the reservation gets repeated for the indicated days of the specified period. You determine the applicable days when you create the request. The reservation that you initially created acts as the parent reservation record.

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If a reservation occurrence conflicts with an existing reservation on a particular day, the reservation occurrence for that day is not confirmed and the state changes to **Conflicted**. The system tries to find an alternative space automatically for **Conflicted** states.

- If a floor map is available, the Workplace Reservation Management application finds a space closest to the same capacity, then looks for one with more capacity, and lastly, for one with less capacity.
- If no floor map is available, the application finds an alternative space in the same area or on the same floor.
- The favorite spaces are prioritized over 'location' (within the same area or proximity).
- The employee can find an alternative space easily if no alternative space was found.
- The employee is notified when the application assigns an alternative space.

For more information about automatically resolving recurring conflicts, see Configure a reservable module and Create a reservation.

If Workplace Reservation Management is unable to find a new workplace, date, and time, relevant messages are shown to the user so that the conflicted reservation can be manually resolved by selecting a different workplace item or by changing the time of the reservation.

For example, if you have reserved a workplace item for a meeting that occurs every Wednesday for one month. Four reservation records are created for each occurrence. But if another employee reserved that same room for the same time as one of your recurring reservations, then your reservation occurrence will conflict with the other employee's reservation. In such a case, you can modify your reservation for that day by selecting a different meeting room or time.

Reservation states

After you make a reservation, the state of the reservation changes to **Confirmed**.

If the reservation requires approvals, its status changes depending on what your approver does. You receive email notifications of these changes. The possible changes are the following:

- If your approver has not taken action on your reservation, the state of the request stays **Awaiting approval**.
- If your approver approves your reservation and the availability is confirmed, the state of the reservation changes to **Confirmed**.
- When the recurring reservations are automatically resolved, the **New Space** state is shown below the **Confirmed** state to indicate that Workplace Reservation Management has assigned a new workspace, date, or time.
- If your approver rejects your reservation, the state of the reservation changes to **Rejected**.
- If your approver approves your reservation but the workplace item is not available for the selected date and time, the state of the reservation changes to **Conflicted**.

  Note: If there are recurring conflicts, employees are expected to manually resolve the reservation conflicts by selecting a new workspace, time, and date. For more information, see Create a reservation.

- If you're reserving a workplace item for recurring days, the reservation gets confirmed for the days and times when the item is available. For the remaining days and time, the state of the reservation remains as **Conflicted**.

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You can modify your reservation and follow up with your approver to resolve your conflicting reservation.

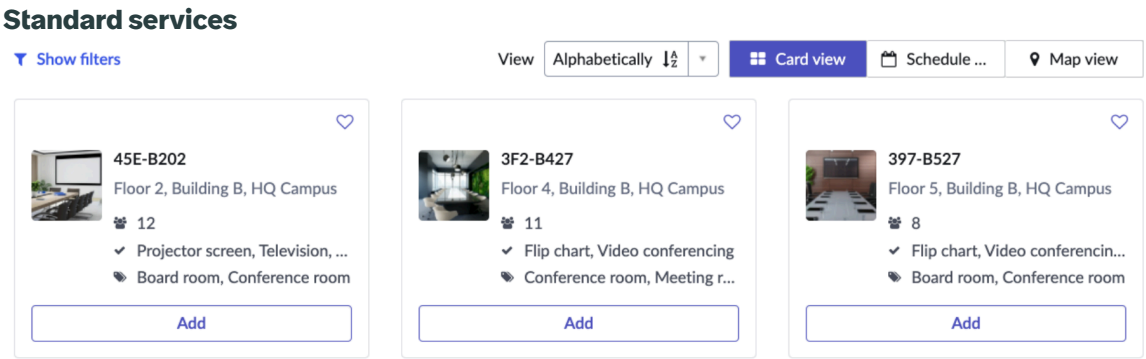
- If you cancel your reservation, the state of the reservation changes to **Cancelled**.

Standard services

Standard services are amenities or basic services that are available with a workplace item by default with their reservation. You can review the standard services associated with a workplace item at the time of creating a reservation request.

Standard service is like a basic provision available to employees which they can use in their reservation without having to request separately. For example, when an employee reserves a meeting room, services like telephone, computer, plugs, video call items are considered as standard services unless until the company makes it a requested service.

Employees can see details of the available standard services with each workplace item that an employee can reserve in the Workplace Reservation Management. The standard services are also displayed as icons in the card view of workplace items when you search for an item. For example, the following image shows standard services available with a meeting room:



Configure Workplace Reservation Management portal

As a Workplace Reservation Management admin, you can decide what can be made reservable in the organization. You can add different types of reservable items in the application for employees to reserve.

You can configure what must be available in the application for reservation. You can configure the reservable modules displayed on the application.

The Reservation portal enables you to make a reservation and perform reservation-related actions. You can access the Reservation portal from the Workplace Reservation Management application and the Workplace Service Portal. For more information about the reservation portal, refer to Make a reservation.

As a Workplace Service Delivery admin, you can perform any action on the Workplace Reservation Management application. You can add reservable workplace items and perform other actions.

As a Workplace Reservation Management admin, the application enables you to perform the following actions:

- Enable manager approvals on reservable modules for reservation.
- Make reservations on behalf of others.
- View all the reservations made.

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- Modify existing reservable modules.
- Activate or de-activate reservable items and control its availability on the application.
- Configure standard services.
- Add reservable purpose on reservable items for employees to make easy selection.
- Configure check-in and check-out requirement on a reservable module.
- View the current state, synchronization state and the check-in state of a reservation.
- View the source, sub-source, last updated source and last updated sub-source of the reservation.
- If you have the Workplace Space Management application installed, you can specify if a cost center/department check is required to reserve the workplace item.
- Create archiving rules. Select from archive rules provided by ServiceNow®.
- Create and assign time slots to reservable modules that are configured for the Quick Reservation widget on the Workplace Service Portal
- Configure the views of the reservable module such as Map view or Schedule view.
- Enable group reservation on workplace items of a module.
- Enable employees to download an iCalendar of a reservation.
- Specify the search limit on a module.
- Assign workplace locations that are allowed to be reserved in a reservable module.

Install Workplace Reservation Management

Install the Workplace Reservation Management application from ServiceNow Store applications. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup checklist for a smooth installation and configuration.

Required setup tasks

Setup tasks	Description
Verify that Workplace Service Delivery - Core (sn_wsd_core) plugin of minimum version 2.0 is activated.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

Role required: admin

About this task

Activate the Workplace Service Delivery - Core plugin (sn_wsd_core) of minimum version 2.0 in your ServiceNow instance before you install Workplace Reservation Management.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

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Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Reservation Management.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Related topics

List of plugins (Australia)

Add a workplace space for reservation

Add different types of workplace spaces like a workspace, desk, or similar spaces for employees to reserve.

Before you begin

- Ensure that you have the following details:
  - Workplace data for your organization
  - Data of workspaces that can be marked as available

For more information about adding the workspaces, see Create records for your workplace data.

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Workplace spaces**.
2. Click **New**.
3. On the form, fill in the fields.

   For a description of the field values, see Space form.

4. Click **Submit**.

Result

The space is added and is available for reservation.

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Add a workplace room for reservation

Add a workplace room for employees to reserve.

Before you begin

- Ensure that you have the following details:
  - Workplace data for your organization
  - Data of workspaces that can be marked as available

For more information about adding the workspaces field information, see Create records for your workplace data.

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Workplace Rooms**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Add a room form.
4. Click **Submit**.

Result

The room is added and is available for reservation in the application.

Configure a reservable module

Create a Reservable Module to add a group of similar reservable workplace items. These workplace items are displayed in a single category on the Reservation portal.

Before you begin

⚠ **Warning:** Starting with Workplace Reservation Management version 2.1.2, to create or view approvers or performer criteria, navigate to **Workplace Core** > **Administration** > **Performer Criteria**.

- After the upgrade, the Reservable module's **Require approval** option is changed to **Override approval policy**.

  Before the upgrade, if a reservable module has the **Require approval** option enabled, then, after the upgrade, it is migrated as **Always require approval** in the **Override approval policy** option. Otherwise, the **Override approval policy** is set to **Never require approval**.

- For existing customers, the Reservable module's approval functionality that were configured earlier to approve reservations remain the same until a new approval definition is configured. After you configure a new approval definition, the approval process will run according to the upgrade.

  After the upgrade, disable the **WSD Reservation Approval Flow** in the **Flow designer**.

Ensure that you have the following details:

- Workplace data for your organization.
- Data of workspaces that can be marked as available.
- Configure approvers/performer criteria

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See Create records for your workplace data to add workplace data.

Role required: sn_wsd_rsv.admin

About this task

A Reservable module groups similar types of workplace items. Employees can view these similar items in one category. For example, a room is a reservable module and it contains similar workplace items like meeting rooms, conference rooms, and other rooms.

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Select **New**.
3. On the form, fill in the fields.

Reservable module form

Field	Description
Name	Name for the reservable module. For example, for meeting rooms, the name should be categorical like `Desks` , `Meeting rooms`, or `Rooms` and so on.
Inline title	Title for the reservable module. The title is displayed inline with a descriptive text on the Workplace Service Portal.
Order	Order in which the reservable module must appear on the Reservation portal.
Active	Option to make the module available for reservation.
Active from	Date from when the reservable module must be active and available for reservation.
Image	Image of the reservable module.

4. Select the Reservable Table Configuration tab.
   On the form, fill in the fields.

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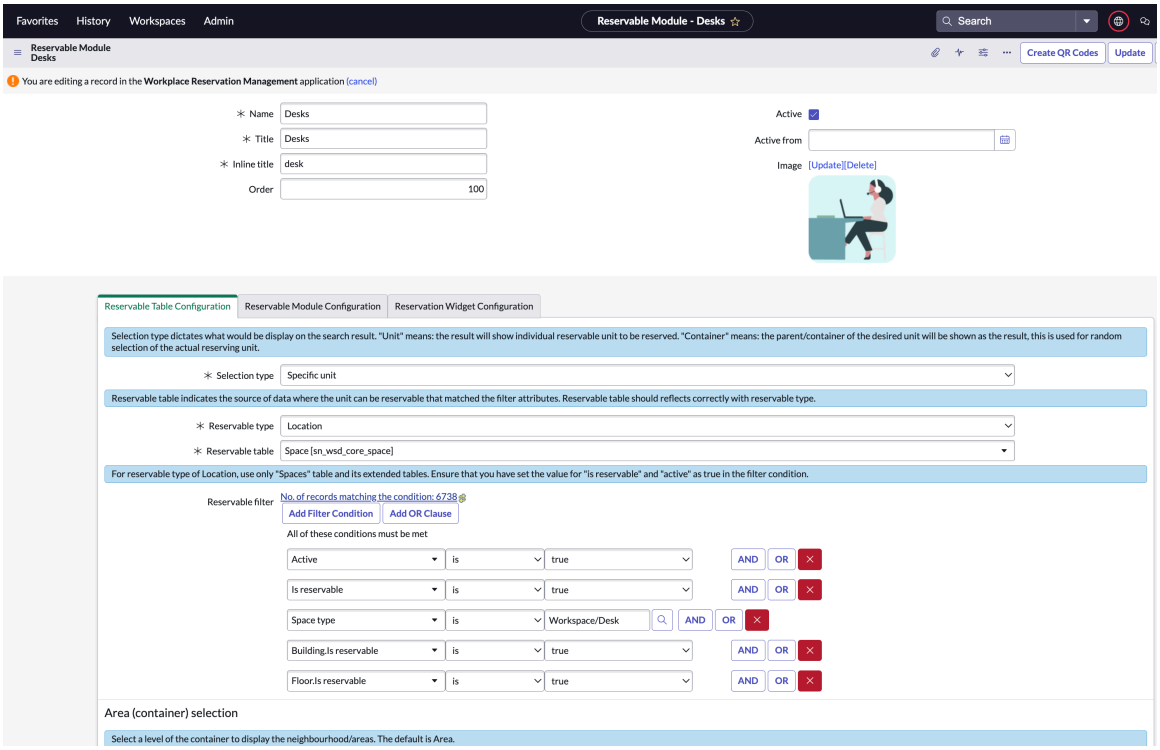

Reservable Table Configuration

Selection type	Type of selection to display in the search results when employees searche. Select one of the following options: ○ **Specific unit**: The search result displays every workplace item. ○ **Container**: The search result displays the parent or container of the workplace items. If you select **Container**, the search results are displayed in groups with a defined quantity available for reservation. Employees can select a container to reserve and any available space from the container is assigned for reservation.
Reservable type	Type of the reservable item.
Reservable table	Table that contains the reservable workplace items. **Note:** If you selected **Location** for the **Reservable type** field, then use only the Space [sn_wsd_core_space] table and its extended tables.
Reservable filter	Filter conditions on the reservable items in the Reservable table. The reservable items are displayed on the application based on the given conditions. You can do the following:

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	○ To add a condition, select **Add Filter Condition**. ○ To add an OR condition, select **Add "OR" Clause**. **Note:** If you are adding a filter on a location, ensure that the **Active** and **Is reservable** fields are set to **True**. If you do not, then inactive items that are not reservable will be displayed as reservable.
Area (Container) selection section	Specify the field details.
Reservable container field	Specify on what basis must the be grouped. The field appears only if you selected **Container** as the **Selecttion type**. The field is automatically set to **Area**. For example, when the field is set to **Area**, the reservation search results will appear as groups based on areas.
Reservable quantity field	Reservable quantity for workplace spaces. The **Reservable Quantity** field determines the number of times a container can be booked within a specific reservation time period. This setting provides with flexibility in setting up space reservations without out the need to create individual space records for reservation. For example, if you select **Reservable Quantity**, the container can be reserved as many times as the combined reservable quantity values of all spaces within that container allow. The reservable quantity depends on the number of spaces provided in the Capacity column of the Workplace Core Space table.

5. Select the Reservable Module Configuration tab.

   On the form, fill in the fields.

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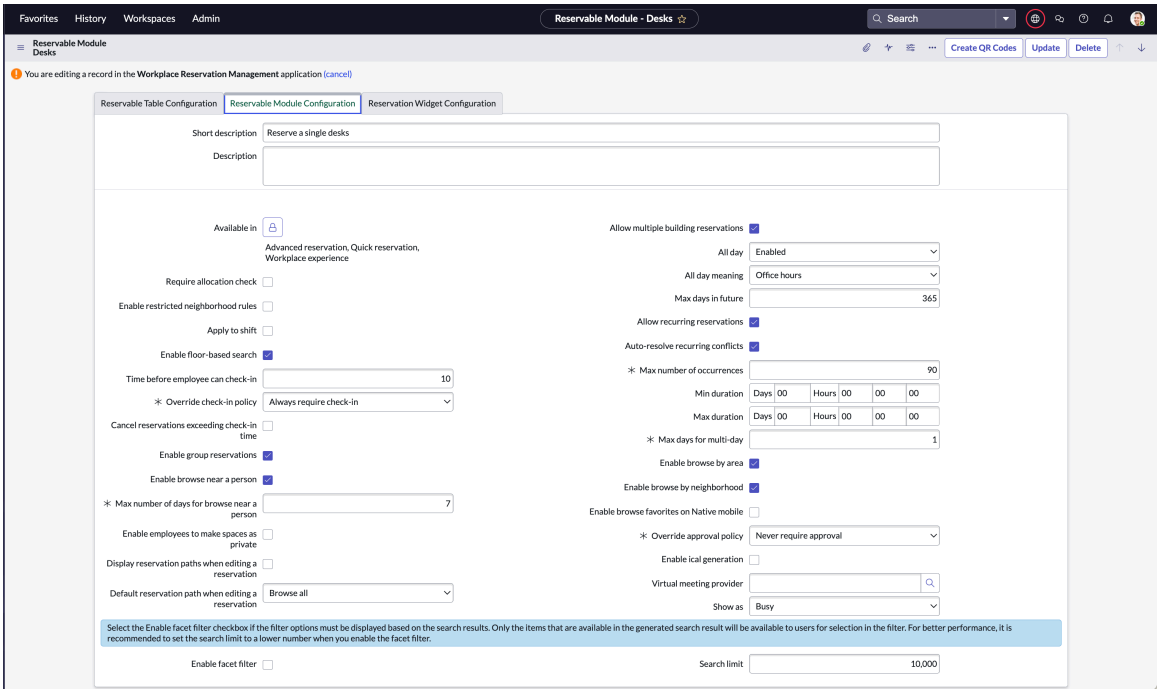

Reservable Module Configuration

Field	Description
Short description	A short description about the module.
Description	Detailed description about the module and the reservable items.
Available in	Option to specify in which reservations the module must be available. ○ **Advanced reservation**: Select this option to make the module available only on the Reservation portal. ○ **Quick reservation**: Select this option to make the module available in the Reservation widget on the Workplace Service Portal homepage.

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Field	Description
	○ **Workplace Experience**: Option to display workplace option on Workplace Service Delivery for Mobile. **Note:** The Workplace experience" is available in the Desks Reservable module level by default. If the **All day** Reservable Module checkbox is not selected, the **Workplace Experience** option is not available in **Available-In** option. Workplace users get an error when they open the In-Office Preferences page and the Workplace page from the Workplace Service Delivery for Mobile "This page cannot be loaded due to a configuration issue. Please review your configuration settings and make the necessary changes." For more information, see Create a reservation for a day in Workplace.
Require allocation check	Option to check if there is an allocation mismatch between the workspace item and the logged-in user. This option appears only if you have Workplace Space Management installed. For Workplace Entities, the search results also display locations that are allocated to the parent entity.
Enable allocation duration check	Option to display spaces in the search results based on the start and end dates of the allocation. This field appears only when the **Require allocation check** field is selected. For recurring reservations, the allocation duration is only checked for the first occurrence. Time-bound allocations follow only the start date and end date of the allocation, which are set in the system time zone. For more information, see Allocate a cost center, department, or workplace entity.

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Field	Description
	Note: ○ In Workplace Space Management version 1.12.0, spaces that have the overlapping allocation and reservation time-frames are qualified for the reservation. ○ From Workplace Space Management version 1.13.0, spaces that do not have overlapping allocation and reservation time-frames are considered unallocated spaces and are qualified for reservation.
Enable restricted neighborhood rules	Option to apply neighbourhood restrictions on the spaces while displaying search results. The search results are displayed based on the restrictions applied on spaces. Restricted users cannot view spaces that they are not allowed to access. The restricted neighbourhoods are automatically filtered out if the logged in user is restricted.
Enable browse by area	Option to enable employees to search for a workplace based on area.
Enable browse by neighborhood	Reservation admin can indicate if neighborhood spaces are available for reservations. Employees can search in the context of a neighborhood and only the available spaces in a neighborhood are displayed for space reservation. For more information, see Create neighborhood reservations. This option is also available on the Now Mobile app.
Enable browse favorites on Native Mobile	Option to enable employees to search from their favorite spaces on the Now Mobile app. **Note:** This option appears only if you have Employee Center 25.0.0 and for employees who have Now Mobile app installed. Ensure that the Mobile Employee Service Portal is enabled. **Note:** This option is available only for the Now Mobile app app.
Override approval policy	Option to specify how to implement the approval policy. Choices are as follows: ○ **No override**: The approval policy is implemented as set in the **Requires approval** field of a workplace space or room.

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Field	Description
	○ **Always require approval**: The approval policy is required regardless of what is set in the **Requires approval** field of a workplace space or room. ○ **Never require approval**: The approval policy is removed irrespective of what is set in the **Requires approval** field of a workplace space or room.
Apply to shift	Option to enable shift-based reservation on the module. **Note:** Recurring reservations are not support for a shift-based reservation. Employees cannot add attendees and view their availability on the reservation search page while making a reservation. For more information, see Create a reservation and Add invitees as collaborators and create a reservation.
Enable floor-based search	Option to enable employees to search for a workplace based on floor using the **Browse All**.
Time before employee can check-in	Option to specify the time before an employee can check in their reservation before it starts.
Override check-in policy	Option to specify how to implement the reservation check-in policy. Choices are as follows: ○ **No override**: The check-in policy is implemented as set in the **Requires check-in** field of a workplace space or room. ○ **Always require check-in**: The check-in policy is required regardless of what is set in the **Requires check-in** field of a workplace space or room. ○ **Never require check-in**: The check-in policy is removed irrespective of what is set in the **Requires check-in** field of a workplace space or room.
Cancel reservations exceeding check-in time	Option to cancel a reservation if an employee does not check in within the specified time.
Enable group reservation	Option to allow group reservation for a selected Reservable Module Configuration. For example, **Desks**.

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Field	Description
	Note: If the **Allow invitees** check box option is selected in the Reservation Widget Configuration, you cannot make a group reservation. The Reservation Widget Configuration tab is available in the Reservable Module.
Enable employees to make spaces as private	Option to enable employees to make the space details private when they make a reservation. When an employee is creating a reservation, the option **Make space details private** is displayed only if the employees are allowed to override their privacy preference for the selected space. Whether an employee can override privacy or not depends on the location privacy setup.
Enable ical generation	Option to enable user to generate an icalendar. **Note:** A user cannot download an iCalendar for spaces and reservations that already synchronizes with their calendar provider.
Default reservation path when editing a reservation	Option to set the context (Reservation Path) when editing a reservation. This option is also available on the Now Mobile app. The reservation paths define the available search criteria. Select any of the following options from the drop-down list: ○ **Based on reservation**: While editing a reservation, employees can search in the context (Reservation Path) used while creating a reservation. For example: **Browse all**,**Browse an area**, **Browse by neighborhood**. ○ **Browse all**: When editing a reservation, the context (path) is defaulted to **Browse all**. Employees can change the selected space or date and time of the reservation. For more information, see Create a reservation.

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Field	Description
	Note: This option is not available on the Now Mobile app.
Virtual meeting provider	Select a virtual meeting provider to enable employees to create a virtual meeting link. If an employee selects the **Add a virtual meeting link** option, a virtual meeting link is automatically generated by the virtual meeting provider.
Allow Multiple Building Reservations	Option to add multiple buildings and select spaces from the buildings in a single reservation. The buildings can belong to different regions or locations and can be from different time zones. **Note:** Adding multiple buildings to a reservation is available only on the Workplace Service Portal. Recurring reservations are not supported for multi-building reservations. For more information, see Create multi-building reservations.
Allow all day reservation	Option to enable employees to reserve a reservable module for an entire day. If this option is unchecked, the **All day reservation** field is disabled. If the **Max days for multi-day** Reservable Module value is set to more than 1 day, the **All day** option is disabled on the Reservation portal. Employees can only make a single day or all day reservation in this case. For more information, see the **Max days for multi-day** property description. **Warning:** From Workplace Reservation Management version , the **Allow all day reservation** and **Require all day reservation** fields are merged under the **All day** field as **Enabled** and **Required** respectively.
Require all day reservation	Option to enforce employees to make **All day** reservation. This option depends on the **Allow All day reservation** option. If the **Allow all day reservation** option is disabled, this option is cleared and disabled.

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Field	Description
	Note: When **Require all day reservation** is selected, employees while making or updating the reservation will find the **All day** option on the Reservation portal enabled by default. Employees can modify the Start date but not the time on the reservation portal. For more information, see Create a reservation **Warning:** From Workplace Reservation Management version , the **Allow all day reservation** and **Require all day reservation** fields are merged under the **All day** field as **Enabled** and **Required** respectively.
All day	Option to enable workplace users to reserve a Reservable Modile Configuration for an entire day. For example, Desk Reservable Module Configuration. ○ **Disabled**: The All day option will be disabled and is not displayed on the Reservation portal. ○ **Enabled**: The **All day** option is available and employees can reserve a space for a day. This configuration is dependent on the (sn_wsd_rsv.day_start) and (sn_wsd_rsv.day_end) reservation property. For more information, see Properties installed with Workplace Reservation Management. ○ **Default**: The **All day** option is available and selected by default. However, the employees can deselect or change the timings if they want.

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Field	Description
	○ **Required**: The **All day** option is displayed as selected and cannot be changed. The **All day** field is set as mandatory. ○ **Note:** If the **All Day** check box is not selected, **Workplace Experience** option is inactive in the **Available in** Reservable Module Configuration. Workplace users get an error when they open the In-Office Preferences page and the Workplace page from Workplace Service Delivery for Mobile "This page cannot be loaded due to a configuration issue. Please review your configuration settings and make the necessary changes". For more information, see Create a reservation for a day in Workplace. **Warning:** From Workplace Reservation Management version , the **Allow all day reservation** and **Require all day reservation** fields are merged under the **All day** field as **Enabled** and **Required** respectively.
Max days in future	Option to specify the maximum number of the days in the future up to which the reservable module can be reserved. For example, if you set the max number of days in future to **90**, employees can make future reservations on this module only up to 90 days in advance. If this option is enabled, users cannot select a date beyond the specified value in **Max days in future** while making a reservation. For more information, see Create a reservation. On Now Mobile app, if you try to select a date too far in the future than what is specified in the **Max days in future**, no results are returned.

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Field	Description
	Note: **Max days in future** field indicates that the user cannot make a reservation beyond the number of days configured as the **Max days in future** value for any reservation. **Max days in future** is a reservation property and **Max number of occurrences** is a recurring reservation property. **Max days in future** value takes priority when both these options are used for the reservation. For example, if the **Max days in future** is 90 days, then the number of occurrences in the recurring reservation can not exceed 90 days even if the user has initially configured the value for Max number of occurrences as 180 days in the Reservable module.
Allow recurring reservations	Option to enable employees to make recurring workplace item reservations. Select the check box to display the recurring reservation options available to users as a search parameter while making a reservation.
Auto-resolve recurring conflicts	Option to automatically resolve recurring reservation conflicts. This option is available when you have enabled the **Allow recurring reservations** option. The system will find an alternative space by using proximity calculation in case of conflict in reservation and will automatically resolve it. If you are using floor maps, then spaces are selected based on the proximity logic. Option to automatically resolve recurring reservation conflicts. This option is available when you have enabled the **Allow recurring reservations** option Resolving a conflict uses one of the following proximity calculations: ○ If a floor map is available, in that case, the application tries to find a space that is closest by using proximity. ○ If in case a floor map is not available, then the application tries to find a space within the same area or floor. **Note:** Favorite spaces are always preferred in both the options.

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Field	Description
	○ Lastly, the application searches for an alternative space either with: ▪ same capacity ▪ more capacity ▪ less capacity For more information, see Create a reservation and Auto-resolve recurring reservations.
Max number of occurrences	Option to specify the maximum number of occurrences for recurring reservation that can be made on the reservable module. The default value is 180. This option depends on the **Allow recurring reservations** check box field. If **Allow recurring reservations** is not selected, the **Max number of occurrences** field is disabled.
Min duration	Option to specify the minimum reservation duration of the reservable module.
Max duration	Option to specify the maximum reservation duration of the reservable module.
Max days for multi-day	Option to make a multi-day reservation. Employees can reserve an available space covering or spanning multiple days. For example, 5 days or more. For more information, see Create a multi-day reservation. Default value for this Reservable Module property is 1. To make a single day reservation, set the value to 1. Value 0 (zero) is not allowed. When the **Max days for multi-day** value is more than 1, the **All day** option is disabled on the Reservation portal while making a reservation. **Note:** The number of days for this property must not exceed the **Max days in future** value on the Reservable Module.
Enable browse near a person	Option to enable users to search for spaces near a person. When a user searches for a space near a person, the available spaces located on the user's floor are displayed. The display criteria are also based on the nearby area of the space or tags assigned to the spaces.

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Field	Description
	Note: The search limit criteria is not applicable if the option is enabled.
Max number of days for browse near a person	Option to specify the number of days employees can reserve a space near a colleague. Admins can configure the maximum number of days an employee would like to reserve a space near a colleague using this property. Default value is 7. Admins can change this value to more than 7 days and enable employees to select the max number of days they would like to book a seat near a team member or a colleague. For more information, see Create a reservation. **Note:** This field is displayed only when the **Enable browse near a person** Reservable module property is enabled on the Reservable Module. The number of days provided for this property cannot be 0 or a negative number (for example, -10). The number of days for this property must not exceed the **Max days in future** value on the Reservable Module.
Enable facet filter	Option to enable facet filter on the workplace items. If the select this option, the filter options are displayed based on the search results. Only the items that are available in the generated search result are available to users for selection in the filter.
Search limit	Option to specify the maximum limit of search results when an employee searches for a workplace location.

6. Select the Reservation Widget Configuration tab.

   On the form, fill in the fields.

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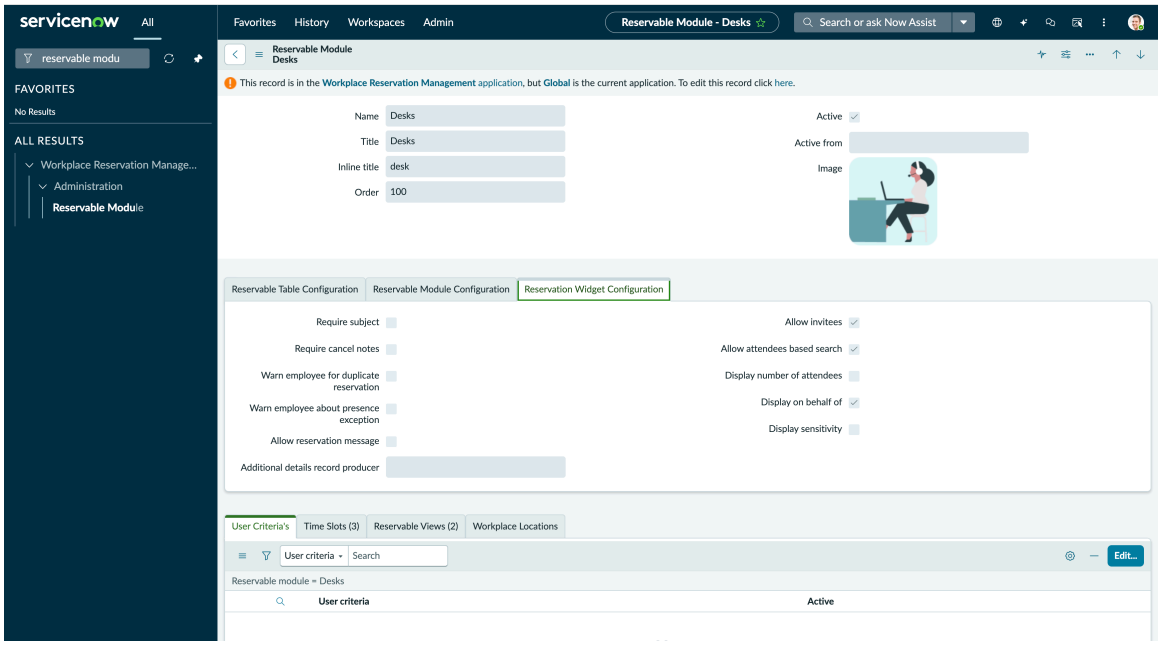

Reservable Widget Configuration

Field	Description
Requires subject	Option to make a reservation subject required before making a reservation.
Require cancel notes	Option to make a cancellation note required before making a cancellation.
Warn employee for duplicate reservation	Option to warn employees if a reservation exists for the selected space type module during the specified date and time for that employee. The warning is displayed based on the date and time specified in the search criteria.
Warn employee about presence exception	Option to warn employees if their presence is set to remote on the date of the reservation. The warning is displayed based on the presence routine of the employee. This option is available if Workplace Concierge is installed.
Allow attendees-based search	Option to add meeting attendees and search for their availability on the Make a reservation portal page. Employees can collaborate with attendees effectively by adding them to their meetings. This option is dependent on the **Allow Invitees** reservable module configuration. If the **Allow Invitees** option is not enabled, this option is unavailable for selection and cannot be enabled. The ability to search and add colleagues or attendees based on their availability

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Field	Description
	is supported only for Microsoft Exchange Online. **Note:** Colleagues can be added on the reservation portal search page. The application retrieves their availability to add them as reservation attendees. Guests can be added on the reservation details page after you've selected a space. For more information, see Add invitees as collaborators and create a reservation.
Allow invitees	Option to enable employees to invite attendees to their reservation. Employees can invite co-workers and also external visitors. ○ If the **Allow invitees** check box is selected, the **Display number of attendees** and **Enable Group Reservations** check box options are unselected by default. ○ If **Display number of attendees** is selected, the **Allow invitees** check box selection is unselected by default.
Display number of attendees	Option to enable employees to specify the number of attendees while making a reservation. If the option is not selected, then the number of attendees is automatically set to **1**. ○ If the **Allow invitees** check box is selected, the **Display number of attendees** and **Enable Group Reservations** check box options are unselected by default. ○ If **Display number of attendees** is selected, the **Allow invitees** check box selection is unselected by default.
Display on behalf of	Option to enable employees to specify on whose behalf they are making a reservation. The option is enabled by default. An error is displayed if the option is disabled.
Display sensitivity	Option to enable employees to set the sensitivity of the reservation. They can set a reservation to **Normal** or **Private**. If the option is not selected, the sensitivity is set to **Normal** and the subject will be visible to others.
Allow reservation message	Option to add notes to a meeting and attach images while making a reservation. The notes and images can be shared with the meeting invitees.

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Field	Description
	Note: When calendar sync is enabled for a space, the message or notes will also be added to the body when we sync the reservation. For Now Mobile app, the message is displayed on the summary page but employees cannot add or edit a message. For more information, see Create a reservation. .
Additional details record producer	Option to link to the record producer that you have configured with additional fields. You can display additional fields on the reservation form. For more information, refer to Configure reservable module with additional details.
Show as	Option to specify what status must the reservation show on the employee's calendar when a reservation is synchronized. This field appears only if Workplace Calendar Synchronization is installed. ○ **Busy**: The reservation will be displayed in the Employee's calendar with a Busy status. The employee's calendar is blocked during the reservation duration. ○ **Free**: The reservation will be displayed in the Employee's calendar with a Free status. The employee's calendar will not be blocked during the reservation duration. **Note:** For the **Show as** feature to work correctly, you must have the following versions of the connections: ○ For Microsoft, you must have Microsoft Exchange Online spoke version 3.2.4. ○ For Google Calendar, you must have the Google Calendar version 2.3.1.

The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Widget instances. The start time and end time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes. For more information see, https://www.servicenow.com/docs/bundle/xanadu-platform-user-interface/page/build/service-portal/concept/c_ConfigureWidgetInstances.html

7. Click **Submit**.

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Result
The Reservable module configuration is added to the application. The reservable items are available to employees based on the filter conditions and properties that are configured. The filter conditions can be applied in the Reservable Table Configuration for a location.

Configure a reservable module to group spaces in an area

Create a reservable module to group spaces in an area. Enable employees to reserve a space in an area.

Before you begin
- Ensure that you have the following details.
  - Workplace data for your organization
  - Data of workspaces that can be marked as available
- Create the records in the following order.
  1. Regions
  2. Sites
  3. Campuses
  4. Buildings
  5. Floors
  6. Areas
  7. Spaces

Role required: sn_wsd_rsv.admin

About this task
An employee can view all the spaces of an area in a single module.

Procedure
1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Click **New**.
3. On the Reservable Module form, fill in the fields.

Reservable Module form

Field	Description
Name	Name for the Reservable module. For example, as the module is to display all the spaces of an area, the name should be categorical like 'Desks within an area'.
Title	Title for the Reservable module.
Active	Option to make the module available for reservation.
Active from	Date from when the reservable module must be active and available for reservation.
Reservable Table Configuration tab	Select the field details in the Reservable Table Configuration tab.

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Field	Description
Selection type	Selection type dictates what would be displayed on the search result. From the drop-list select **Container**. **Note:** Specific unit indicates that the search result will show individual reservable unit to be reserved.
Reservable type	Type of the reservable item. Select **Location**.
Reservable table	Table that contains the reservable workplace items. Select the Space [sn_wsd_core_space] table. **Note:** If you selected Location for the Reservable type field, then use only the Space [sn_wsd_core_space] table and its extended tables.
Reservable quantity field	Select Reservable quantity.
Reservable filter	Filter conditions on the reservable items in the Reservable table. The application displays the reservable items based on the given conditions. ○ To add a condition, select **Add Filter Condition**. ○ To add an OR condition, select **Add OR Clause**. **Note:** If you are adding a filter on a location, ensure that the **Active** and **Is reservable** fields are set to **True**. If these conditions are not set, the application displays even the inactive items that are not reservable as available for Rservation.
Container selection, reservable quantity settings	
Area (container) selection section	Select the field details in this section.
Reservable container field	Level of the container. This field is automatically set to **Area**.
Reservable Module Configuration tab	Select the field details in the Reservable Module Configuration tab.
Short description	Short description about the module.
Description	Detailed description about the module and the reservable items.

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Field	Description
Override check-in policy	Option to specify how to implement the reservation check-in policy. ○ **No override**: The check-in policy is implemented as set in the **Requires check-in** field of a workplace space or room. ○ **Always require check-in**: The check-in policy is required irrespective of what is set in the **Requires check-in** field of a workplace space or room. ○ **Never require check-in**: The check-in policy is removed irrespective of what is set in the **Requires check-in** field of a workplace space or room.
Requires Approval	Option to make approval required before making a reservation.
Requires subject	Option to make a reservation subject required before making a reservation.
Require cancel notes	Option to make a cancellation note required before making a cancellation.
Apply to shift	Option to enable shift-based reservation on the module.
Max days in future	The maximum number of the days in the future up to when an employee can make a reservation. For example, if you set the number of days to 10, employees can make future reservation on this module only up to 10 days in advance.
Min duration	Minimum reservation duration of the reservable module.
Max duration	Maximum reservation duration of the reservable module.
Allow whole day reservation	Option to enable employees to reserve a workplace item of the module for an entire day.

4. Click **Submit**.

Result
The reservable module is added to the application. On the Reservation portal, employees can view the spaces of an area in this module.

Add workplace locations to a reservable module

Configure workplace locations that must be available to users for reservation when they select a reservable module. Restrict the usage of a workplace by adding only those workplaces that are can be reserved.

Before you begin
Role required: sn_wsd_rsv.admin

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About this task
Add workplace locations to a reservable module so that employees can access only those workplaces while making a reservation. By default, there are no workplace locations added to a reservable module.

Procedure
1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Select the reservable module to which you want to add workplace locations.
3. On the form, scroll down to the Workplace Locations related list.
4. Click **Edit...**.
5. On the Edit members form, set the filter option **Active** to **True**.
6. Select the workplace locations by doing the following:
   a. Select the workplace location from the **Collection** column on the left.
   b. Move the selection to the **Workplace Locations List** column on the right.
      To move the location, use the add/remove icon ( ).
   c. Click **Save**.

Result
The workplace locations are added to the reservable module. When an employee selects the reservable module to make a reservation, only the configured workplace locations are displayed.

Generate and print a QR code for a reservable module

Generate and print a QR code for an entire reservable module. Place the QR codes at reservable workplace locations so that employees can scan the code, make a reservation, or perform reservation-related actions.

Before you begin
Role required: sn_wsd_core.workplace_manager, sn_wsd_rsv.admin, or sn_wsd_rsv.manager

About this task
Generate and print QR code for a reservable module such as Desks, Meeting rooms, Parking and more. For example, when you generate and print a QR code for Parking reservable module, then the generated QR code can be used for all the locations that are assigned to Parking reservable module. You can download the QR code, print and place it at all the locations that belong to the Parking reservable module.

Procedure
1. To generate a QR code, do the following:
   a. Generate QR code using the following navigation paths:
      You can generate QR code using any of the following navigation paths:

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- Navigate to **Workplace Core** > **QR code management** > **Create QR codes**.
- Navigate to **Workplace Core** > **Space Administration** > **Rooms**. Select a room and click **Create QR code**.
- Navigate to **Workplace Core** > **Space Administration** > **Spaces**. Select a space and click **Create QR code**.

2. On the form, fill in the fields.

Generate QR form

Field	Description
Number	Number of the QR code.
Table	Table for which you want to add a QR code. By default, the table is set a as **Space [sn_wsd_core_space]**.
State	Status of the QR code generation.
Short description	Description about the QR code.
Conditions	Filter conditions based on which the QR code must be generated. ○ To add a condition, select**Add Filter Condition**. ○ To add an OR condition, select **Add "OR" Clause**.

3. To print the QR code, click **Print QR codes**.
4. In the Print QR codes dialog box, do the following:

   a. Specify a file name for the printed QR code in the **Enter file name** field.
   All the QR codes of the selected spaces are in a single PDF file with the specified file name.

   b. View the number of QR codes to be printed in the **Count** field.

   c. Select the layout of the QR code in the **Label layout** field.

   d. Preview the QR code print.

   e. Click **Print**.
   The QR code generation runs in the background.

What to do next

The QR codes are generated. The QR codes are printed in a single PDF file with the specified file name. You will receive an email notification after the QR code generation is completed with the QR code details.

After the QR code generation is completed, go to **Manage QR codes** to view the generated file. For more information, refer to Manage QR codes.

Click **download** to download the PDF file.

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Create a record producer to add additional details

Configure a record producer with additional details and add it to the reservable module. The fields configured for additional details will be displayed to the employee when they make a reservation.

Before you begin

Before you configure the record producer, refer to Additional details record producer - Mapping Variable types and limitations.

Note: The record producer is only used to retrieve data related to the additional fields.

If you want to add details that aren't included in the Workplace Reservation (sn_wsd_rsv_reservation) table, you must perform the following:

Important: In the Workplace Reservation (sn_wsd_rsv_reservation) table, Columns related list, when you add fields (columns) that aren't included, note the following:

- On the Dictionary Entry form, the **Mandatory**, **Read only** and **Display** fields are not applicable.
- The columns in the table are created to only store the data.
- The **Max length** field is considered to save the data with **Max length**.

1. Navigate to **All** > **System Definition** > **Tables**.
2. Open the Workplace Reservation (sn_wsd_rsv_reservation) table.
3. On Table form, scroll down to the Columns related list.
4. Select **New**.
5. On the Dictionary Entry form, fill in the fields.

   For more information on columns and fields, refer to Exploring field administration.
6. Select **Submit**.

   The table column is added.
7. **Update** the Workplace Reservation (sn_wsd_rsv_reservation) table

Note:

When you configure the record producer, note the following:

- You can add **Catalog UI Policies** to the record producer.
- Only the following **Catalog Client Scripts** types are supported:
  - OnChange
  - OnLoad
- Code added in the **Script** isn't supported.
- The following record producer related lists aren't supported:
  - Variable Sets
  - Not Available For
  - Categories
  - Catalogs

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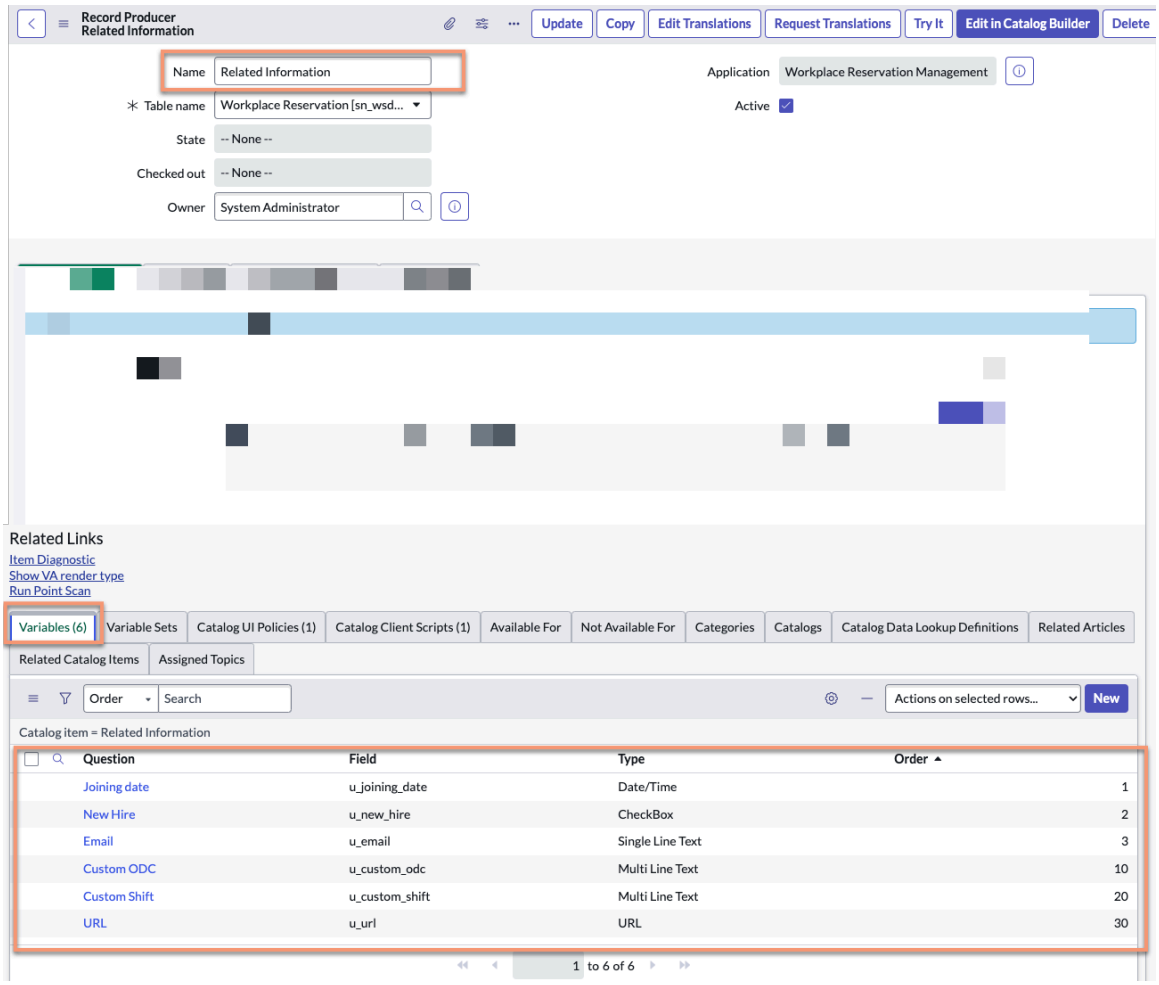
- Catalog Data Lookup Definitions
- Related Articles
- Related Catalog Items
- Assigned Topics

Role required: sn_wsd_rsv.admin

About this task

Create a record producer with additional details and link it with the reservable module on which you want the details to be displayed to an employee. For example, if you add a record producer - Related Information and link it with the Meeting rooms reservable module, then the reservation form in the Reservation Portal displays an additional section - Related Information as follows:

Record producer form of 'Related Information':



Reservation portal - Reservation form with the 'Related Information' section:

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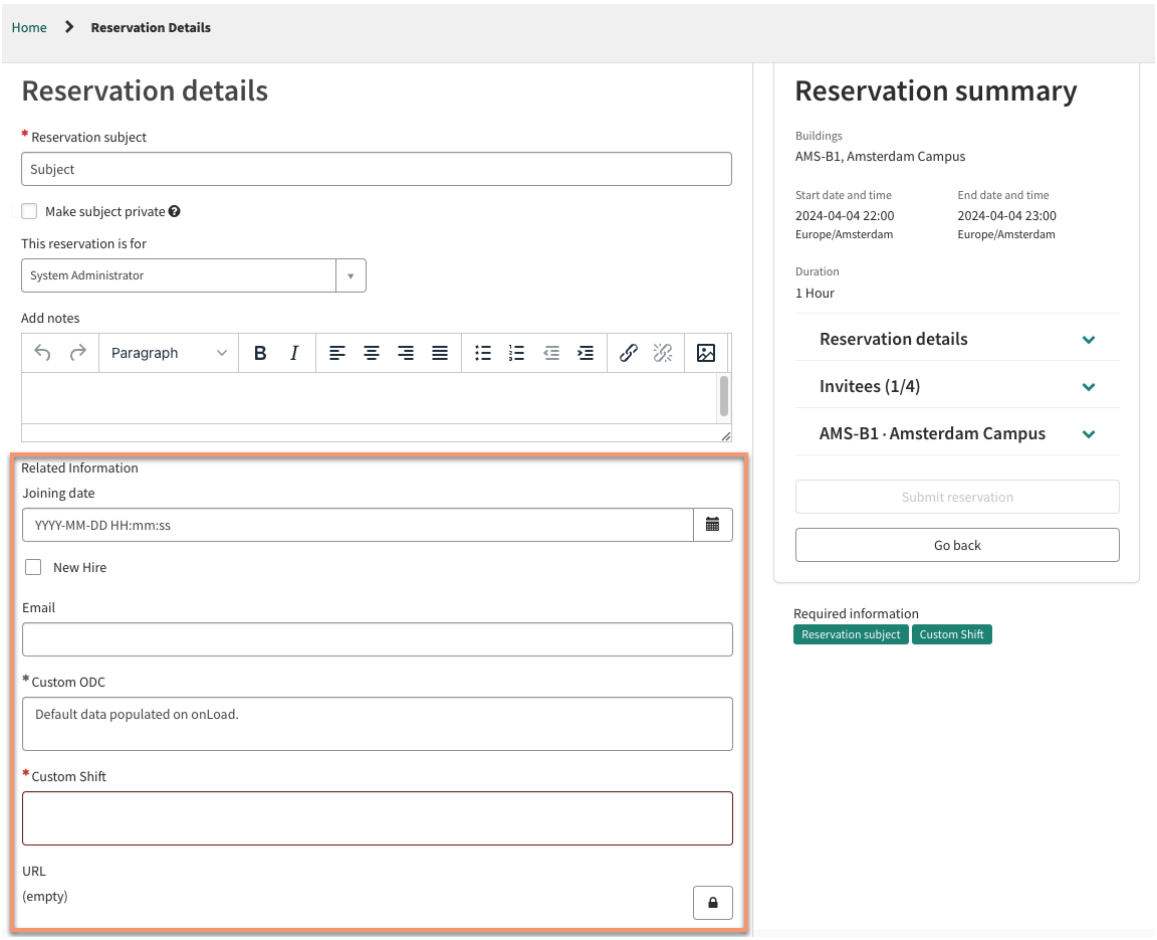

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Record producers**.
2. Select **New**.
3. Enter the **Name** of the record producer.
4. In the **Table name** select Workplace Reservation (sn_wsd_rsv_reservation) table.
5. Select **Active** to activate the record producer.
   For further form field descriptions, refer to Record Producer form.
6. Select and hold (or right-click) on the form header and select **Save**.
   The record producer is created. After creation, a list of record producers created in the application is displayed.
7. From the list, open the record producer that you created.
8. In the **Variables** related list, add the additional details that you want to configure.

   Variables collect information from the user, and are used to ask questions and map answers to fields. You can add as many variables as you need to the reservation form. Commonly used variable types include:

   - Checkbox
   - Multiple Choice
   - Reference
   - Select Box
   - Single Line Text

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To learn more about the different types of variables and how to configure them, see Types of service catalog variables Types of service catalog variables.

a. Select **New**.

b. On the Variable form, select **Map to field**.

c. In the **Order** field, specify in what order should the field appear.

d. In the **Field** field, select the field that you want to add.
You can select from a list of fields available with the Workplace Reservation (sn_wsd_rsv_reservation) table.

e. Select **Active** to activate the field.

f. **Optional:** To set the field as required, select **Mandatory**.

g. **Optional:** To set the field as read only, select **Read only**.

h. **Optional:** To hide the field, select **Hidden**.

i. In the **Question** related list, enter the name of the field in the **Question** field.
The name specified in the **Question** field is displayed on the form.

j. Select and hold (or right-click) on the header and select **Save**.
The field is added. Repeat the above steps if you want to add more fields.

Important: The Permission and Availability related lists aren't supported for the variable.

9. Navigate back to the Record producer form.
The added fields are displayed in the **Variables** related list.
10. **Optional:** You can add **Catalog UI Policies**.
Refer to Service catalog UI policy
11. **Optional:** You can add **Catalog Client Scripts**.
Refer to Create a Service Catalog client script.

Note: Only the following Client Scripts types are supported:

- OnChange
- OnLoad (Note: The script part must be wrapped in setTimeout)

12. Select **Update**.

Result
The record producer is created with the additional details.

What to do next
Create a record producer to add additional details

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Configure reservable module with additional details

The application enables you configure a reservable module with additional details based on your organization's requirements.

Before you begin

Verify that you have the following details.

- Workplace data for your organization
- Data of workspaces that can be marked as available
- Record producer with the additional details fields. Refer to Create a record producer to add additional details.

Role required: sn_wsd_rsv.admin

About this task

Configure a reservable module to use the additional details fields that you want to display on the reservation form when employees make a reservation. The fields appear under an additional details section, along with the existing form fields provided by the application based on your configuration. For more information about the reservable module configuration, refer to Configure a reservable module.

The additional details are displayed when an employee requests a single, multi, recurring and a group reservation. The details entered in the additional details are also displayed in the Reservation summary of the reservation.

To add custom fields:

- You must create a record producer with the fields. Refer to Create a record producer to add additional details.
- Link the reservable module with the record producer.

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. **Optional:** Select **New** if you want to create a reservable module.
   To fill the form, refer to Configure a reservable module.
3. Select the reservable module to which you want to add additional details.
4. On the Reservable module form, select **Reservation Widget Configuration**.
5. In the **Additional details record producer**, select the record producer that you created with the additional details.
6. Select **Update**.

Result

The reservable module is configured with additional details.

Assign spaces to an area

Add spaces to an area to make them available for reservation. On the Reservation portal, when an employee searches for an area, all the available spaces that are assigned to that area are displayed.

Before you begin

The following plugins should be installed:

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- Workplace Central
- Workplace Reservation Management
- Workplace Space Management
- Workplace Core

Ensure that the area to which you are assigning spaces is configured in the application.

1. Navigate to **Workplace Core** > **Space Administration** > **Areas**.
2. Check that the area is configured.

Ensure that the spaces are assigned to the area.

1. Navigate to **All** > **Workplace Core** > **Space Administration** > **Spaces** and select the space.
2. On the form, ensure that the **Area** field has a value.

For more information, see Providing your workplace data.

Role required: sn_wsd_core.workplace_manager or sn_wsd_rsv.admin

About this task

Assign desks or spaces that belong to an area. When an employee searches for an area to make a reservation, all the available spaces or desks that belong to that area are displayed. You can add spaces individually or in bulk. For example, you can add spaces individually like C1 and C2, or you can add one space C with a quantity of 100.

Procedure

1. Navigate to **Workplace Core** > **Space Administration** > **Spaces**.
2. Select the space that you want to assign to the area.
3. Open the form in the Workplace view.

   a. On the top-left corner of the form, right-click the additional actions icon.
   

   b. In the list, select **View** > **Workplace**.

4. On the Space form, in the **Organization details** tab, select the area in the **Area** field.
5. **Optional:** To add a bulk quantity of this space, specify a quantity in **Reservable quantity** field in the **Extra information** tab.
6. Click **Update**.

Result

The space is added to the area. On the Reservation portal, the following actions are performed:

- When an employee searches for the area, the assigned space is displayed.
- If you have added bulk quantity for a space, the space is displayed with a maximum capacity in the card view. When an employee makes a reservation for this space, the capacity is deducted. The space is again displayed with the available capacity for the next reservation until the maximum capacity is 0.

If the reservable module to which the space is assigned has the **Enable restricted neighborhood rules** option enabled, then the space is displayed to the user based on the

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restrictions. That is, if the user is restricted to view the spaces of this neighbourhood, then the space is not displayed to him in the search results. If the user is restricted to view the spaces of a neighbourhood to which they don't belong or, if the user is not added in the Neighbourhood User Assignment table.

What to do next
To view the spaces assigned to an area, navigate to **Workplace Core** > **Space Administration** > **Areas** and select an area. The assigned spaces are displayed in the Spaces related list.

Create a standard service

Create a Standard service to make it available to employees by default when they make a reservation.

Before you begin
Role required: sn_wsd_rsv.admin

About this task
A Standard service is a basic provision available with a reservable workplace item when a reservation is made. For example, white board, additional monitor, and similar other standard services.

Procedure
1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Standard Services**.
2. Click **New**.
3. On the form, fill in the fields.

Standard services form

Field	Description
Name	Enter the name of the standard service
Active	Select active to make it available in reservations.
Service Configuration section	Specify the field details in the Service Configuration section.
Short description	Enter a short description about the service.
Font awesome icon	A font awesome icon in the 'fa-(name)' format. Currently, the **Font Awesome** library of version 4.7 is supported.

4. Click **Submit**.

Result
The standard service is added to the application.

What to do next
Add the standard service to a workplace room or space. For more information, see Add a standard service to workplace.

Add a standard service to workplace

Add a standard service to a workplace space or room based on where it is made available.

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Before you begin

Create a standard service

Role required: sn_wsd_rsv.admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration**.
2. Based on where you are adding the standard service, make the following selection:'
   - To add the service to a workplace space, select **Workplace Spaces**.
   - To add the service to a workplace room, select **Workplace Rooms**.
3. Select the Workplace Space/Room where you want to add the standard service.
4. On the form, scroll down and click **Edit** in the **Standard Services** section.
5. On the Edit Members form, select the service.

   a. Select the standard service from the **Collection** column on the left.

   b. Move the selection to the **Standard Services List** column on the right.

   Use the Add-remove. icon to move the services.

6. Click **Save**.

Result

The Standard service is added to the selected workplace space or room.

Create a flexible service

Create a flexible service and provide it as an extra service to employees. Employees can use the flexible service and other basic standard services when they make a reservation.

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Before you begin

Warning: Starting with Workplace Reservation Management version 2.1.2, you cannot create any extra services or flexible services directly using the Workplace Reservation Management application. Beginning from Workplace Reservation Management version 2.1.2, you can create an extra service only as a workplace service using the Workplace Case Management application only. The Workplace Case Management application is automatically available for installation after the upgrade. If you have installed Workplace Reservation Management version 2.1.2 or above directly (as a first time user), there will be no impact and the following conditions does not apply to you.

- After the upgrade, the existing flexible services are removed from the Workplace Reservation Management application and are listed as workplace services in the Workplace Case Management application.

  For more information on how to create an extra service after the upgrade, refer to Create a workplace service to provide an extra service for a reservation.

- Each category of a flexible service is created as a workplace service. The flexible services that belonged to that category are created as Workplace Service Items of that workplace service.
- The locations to which the flexible services were available are listed in the Workplace Service Item Locations Related list of that workplace service.
- There is no effect to employee experience on the Reservation portal.
- All the extra services requested by employees along with their reservation in the past six months are restored automatically. The extra service requests are logged in the Requested Service Items [sn_wsd_case_service_item_request] table of the Workplace Case Management application.
- To migrate the subcategories and to create the case and task templates automatically, you must run the Script include `Choice and Template Migration Script`. The instructions on how to run the script are included in the Script include description.

Role required: sn_wsd_rsv.admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Flexible Services**.
2. Click **New**.
3. On the form, fill in the fields.

Flexible Services form

Field	Description
Name	Name of the flexible service.
Description	Short description about the service.
Category	Category of the flexible service. To add a new category, do the following:

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Field	Description
	a. Right-click **Category** and select **Configure choices**. **b.** On the Configure Category Choices form, in the **Enter a new item** field, enter the name of the category that you want to add. **c.** Click **Add**.
Sub Category	Subcategory of the selected category of the flexible service. You can also add a subcategory by following the same steps as when adding a category.
Active	Option to activate the flexible service.
Image	Image of the flexible service.
Service Configuration	
Preparation duration	Time required to prepare the flexible service. For example, if the flexible service is a catering service, then specify the time that is required to prepare the items. The workplace location will be blocked for the specified duration to prepare before the reservation starts. Enable the [sn_wsd_rsv.is_blocker_mandatory] system property to create a blocker reservation.
Cleanup duration	Time required to clean up the items that are provided in the flexible service. The workplace location will be blocked for the specified duration to clean up after the reservation ends. Enable the [sn_wsd_rsv.is_blocker_mandatory] system property to create a blocker reservation.
Quantity enabled	Maximum quantity of items that are available to reserve.
Price per unit	Pricing of the flexible service.

4. Click **Submit**.

Result
The flexible service is added to the application.

What to do next
Add the flexible service to a workplace space or room, so that the service is available to employees when they make a reservation. For more information, see Add a flexible service to workplace item.

Add a flexible service to workplace item

Enable employees to request for extra services. Add an extra service to a workplace space or room, and make the service available to employees when they make a reservation.

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Before you begin
Make sure you have already created a flexible service. See Create a flexible service.

> **Warning:** Starting with Workplace Reservation Management version 2.1.2, The Flexible Services related list is no longer available. If you have installed Workplace Reservation Management version 2.1.2 or above directly (as a first time user), there will be no impact and the following conditions does not apply to you.
>
> After upgrading, the flexible services are available as Workplace Service Items. To view the available workplace service items, view the Workplace Service Items related list. To add a workplace service item to the workplace space/room, open the Workplace Service and select the Workplace Service Item. After you open the Workplace Service Item record, add the workplace in the Workplace Service Item Locations related list. For more information, refer to Make a workplace service item available to a workplace location.

Role required: sn_wsd_rsv.admin

About this task
Configure flexible services and add them to a workplace space or room. When an employee makes a reservation for the workplace space or room, they can use the flexible services as extra services.

Procedure
1. Navigate to **All** > **Workplace Reservation Management** > **Administration**.
2. Based on where you are adding the flexible service, do one of the following.
   - To add the service to a workplace space, select **Workplace Spaces**.
   - To add the service to a workplace room, select **Workplace Rooms**.
3. Select the workplace space room where you want to add the flexible service.
4. On the form, scroll down and click **Edit** in the Flexible Services related list.
5. On the Edit Members form, select the service.
   a. From the **Collection** column on the left, select the flexible service.
   b. To move the service to the **Flexible Services List** column on the right, use the add-remove icon.

6. Click **Save**.

Result
The flexible service is added to the selected workplace space or room.

Create a workplace service to provide an extra service for a reservation

Create a workplace service and provide it as an extra service to employees while making a reservation. Use the Workplace Case Management application to create the workplace service.

Before you begin
Ensure that you have the following:

- Have the Workplace Case Management application installed.
- Task templates and Case templates to link to the workplace service.

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- Record producer to link to the workplace service.
- Active flows in case you want to create a workplace service flow.

Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task

To understand workplace services and the workplace service-related options, refer to Workplace Services.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Click **New**.
3. On the form, fill in the fields.
   For a description of the field values, see Workplace Service form.
4. Click **Submit**.

Result

The workplace service is created and will be available to employees as an extra service.
When an employee requests an extra service, a workplace case is created in the Workplace Case Management application. If the extra service is modified by the employee, then the existing workplace case is canceled and a new workplace case is again created with the modified details.

What to do next

- If the extra service requires an employee to select from a list of options, then you must add those options as workplace service items to the workplace service. To add workplace service items, refer to the following:
  - Add a workplace service item to a workplace service.
  - Make a workplace service item available to a workplace location.
- To view the workplace cases, navigate to **Workplace Case Management** > **Workplace Cases**.
- You can also view the reservation details of a Workplace case. To view the details, perform the following actions:
  1. Right-click the form header.
  2. Select **View** > **Reservation View**.

     In the **Reservation view**, you can view details such as the reservation and comments added by the employee while requesting an extra service.
- You can also view the extra service cases and tasks in the Workplace Reservation Management application.
  - To view the cases, navigate to **Workplace Reservation Management** > **Reservation Overview** > **Extra Service Cases**.
  - To view the tasks created for the cases, navigate to **Workplace Reservation Management** > **Reservation Overview** > **Extra Service Tasks**.

Create a reservable view

Configure a view that employees can view while making a reservation on the Reservation portal.

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Before you begin

The following reservable views are available with the Workplace Reservation Management application:

- card
- map
- schedule

To view workplace items in the above views while making a reservation, configure the reservable module to use the reservable views. For more information, refer to Configure a reservable view on a reservable module.

Note: The Workplace Reservation Management application does not support DXF maps.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Views**.
2. Click **New**.
3. On the form, fill in the fields.

Reservable View form

Field	Description
Name	Name of the view.
Label	Label with which this reservable view is displayed on the Reservation portal.
Application	Application of the reservable view. This field is automatically set. Ensure that **Workplace Reservation Management** is selected.
Icon class name	Icon class name of the reservable view.
Active	Option to activate the reservable view.

4. Click **Submit**.

Result

The reservable view is added.

What to do next

Add the view to a reservable module. The workplace items of the reservable module to which the view is added will be displayed in that view. For more information, refer to.

Configure a reservable view on a reservable module

Assign different views on a reservable mobile. The workplace items of the module can be viewed in the configured views while making a reservation on the Reservation portal.

Before you begin

The Workplace Reservation Management by default assigns the following views to a reservable module until they are set to False.

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- Card view
- Schedule view

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Select the reservable module to which you want to assign a reservable view.
3. On the form, scroll down to the Reservable Views related list.
4. Click **Edit...**.
5. On the Edit members form, set the filter option **Active** to **True**.
6. Select the reservable view by doing the following:
   a. Select the time slot from the **Collection** column on the left.
   b. Move the selection to the **Reservable Views List** column on the right.
      To move the time slot, use the add/remove icon ( ).
   c. Click **Save**.
7. To set a default reservable view, set the **is default** value of the reservable view as **True**. Ensure that except the selected default reservable view, the value of all other reservable views are set to **False**.
8. To specify an order in which the reservable views must be displayed on the portal, do the following:
   a. Select the Preview icon ( ).
   b. Click **Open Record**.
   c. On the Reservable Module View Configuration form, specify the **Order**.
   d. Click **Update**.
   e. Repeat the same procedure until you specify the order for every reservable view.

Result

The reservable view is added to the module. The workplace items of the module can be viewed in the selected view.

Create a user criteria record

Add a user criteria record to decide which users, roles, and groups can access a reservable module.

Before you begin

Role required: sn_wsd_rsv.admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **User Criteria**.
2. Click **New**.

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3. On the form, fill in the fields.

   For a description of the field values, see User criteria form.

4. Click **Submit**.

Result
The user criteria is added to the application.

What to do next
Apply user criteria on a reservable module

Apply user criteria on a reservable module

Apply a user criteria to give permission for employees and groups to view and make reservations on a reservable module.

Before you begin
Role required: sn_wsd_rsv.admin

About this task
When a user criteria is applied, the availability of the reservable items in the reservable module will be displayed only to the specified users.

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Select the reservable module that you want to apply the user criteria on.
3. In the User criteria's related list, click **Edit...**.
4. On the Edit members form, set the filter option **Active** to **True**.
5. Select the user criteria by doing the following:

   a. Select the user criteria from the **Collection** column on the left.

   b. Move the selection to the **User Criteria's List** column on the right.

   Use the Add/remove icon ( ) to move the user criteria.

   c. Click **Save**.

6. Click **Save**.

Result
The selected user criteria is applied on the reservable module.

Configure a reservable purpose

Create a purpose that describes the use of a workplace item. Add this purpose to a relevant workplace space or room so that the purpose is displayed on the reservation portal.

Before you begin
Role required: sn_wsd_rsv.manager

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Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Purposes**.
2. Click **New**.
3. On the form, fill in the fields.

Reservable Purpose form

Field	Descriptions
Name	Descriptive name for the purpose.
Active	Option to activate the reservable purpose.
Description	Short description with details on the purpose of the reservable item. The description is not displayed to the employees.

4. Click **Submit**.

Result
The reservable purpose is added.

What to do next
Add a reservable purpose to a workplace item.

Add a reservable purpose to a workplace item

Define the purpose of a workplace item by adding a reservable purpose. The purpose is displayed in the details of the workplace item so that employees can select the appropriate item.

Before you begin
Role required: sn_wsd_rsv.manager

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration**.
2. Based on the type of workplace item that you want to add a reservable purpose to, do one of the following.

Workplace item	Navigation
Workplace space	**a.** Click **Workplace Spaces**. **b.** Select the space that you are adding the purpose to.
Workplace room	**a.** Click **Workplace Rooms**. **b.** Select the room that you are adding the pur pose to.

3. In the Reservable Purposes related list, click **Edit**.
4. On the Edit Members form, select the reservable purpose.

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a. Select the reservable purpose from the **Collection** column on the left.

b. Move the selection to the **Reservable Purposes List** column on the right.

To move the purposes, use the add-remove icon ( ).

5. Click **Save**.

Result
The reservable purpose is added to the workplace item.

Create a quick reservation time slot

Create a time slot for the reservable module that is available in the Quick Reservation widget on the reservation portal. When an employee wants to reserve a workplace item of that reservable module, the employee can select a suitable time slot instead of specifying a start and end times for the reservation.

Before you begin
Role required: sn_wsd_rsv.admin

About this task
Create a time slot for reservation. You can specify the order of appearance of the time slot in the selection list for reservations.

Note: You can add a time slot only to the reservable module that is configured as available on the Quick Reservation widget.

Procedure
1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Time Slots**.
2. Click **New**.
3. On the form, fill in the fields.

Time slot form

Field	Description
Name	Name of the time slot.
Short description	Short description about the time slot.
Start time	Start time of the time slot.
End time	End time of the time slot.
Active	Option to activate the time slot.
Order	Order in which the time slot is displayed in the selection list.

4. Click **Submit**.

Result
The time slot is created.

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What to do next
Add the time slot to the reservable module. The time slot will be displayed in the selection list when an employee wants to reserve a workplace item from the reservable module that has this time slot. For more information, see Add a time slot to a reservable module.

Add a time slot to a reservable module

After you create a time slot, assign the time slot to a reservable module that is configured for reservation on the Quick Reservation widget. When an employee wants to reserve a workplace item of this reservable module, the employee can select a time slot for reservation.

Before you begin
Create a quick reservation time slot.

Role required: sn_wsd_rsv.admin

About this task
After you create a time slot, you must assign the time slot to the reservable module to make it available for reservation.

Procedure
1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Select the reservable module to which you want to add a time slot.
3. On the form, scroll down to the Time Slots related list.
4. Click **Edit...**.
5. On the Edit members form, set the filter option **Active** to **True**.
6. Select the time slot by doing the following:
   a. Select the time slot from the **Collection** column on the left.
   b. Move the selection to the **Time Slots List** column on the right.
      To move the time slot, use the add/remove icon ( ).
   c. Click **Save**.

Result
The time slot is added to the reservable module. When an employee uses the Quick Reservation widget to reserve a workplace item of this reservable module, the time slot is displayed.

Important: When the reservable module is configured, the minimum and maximum duration set to 4 and 8 hours are not validated it impacts quick reservation.

Configure virtual meeting providers

Enable employees to provide a virtual meeting link with their reservation. Configure the virtual meeting providers so that the virtual meeting link of that provider is automatically generated when the employee makes a reservation.

Before you begin
The Workplace Reservation Management application provides the **Template** virtual meeting provider by default. The following virtual meeting providers are also supported if they are configured:

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- Microsoft Teams: Refer to Connect Workplace Reservation Management with Microsoft Teams. Microsoft Teams.
- Zoom: To use Zoom, you must have a Zoom user account. Refer to Connect Workplace Reservation Management with Zoom.

> **Warning:** The Zoom spoke version 3.0.0 is not supported. Only the Zoom spoke versions 3.0.3 and later are supported.

- Ensure the following:
  - Update the Workplace Reservation Management application only after installing the Microsoft Teams and Zoom spokes. Otherwise, you must repair the Workplace Reservation Management application.
  - Microsoft Teams works only with a Microsoft account (Exchange Online, Exchange OnPrem). If you have both Google and a Microsoft Teams account, the virtual meeting provider cannot be added. If you want to create a Microsoft Teams account, you must create a Microsoft account. The Microsoft Teams account is mapped to the Microsoft account and not to the Google account.
  - For Microsoft Teams, to create a meeting link on behalf of other users, refer to Microsoft documentation.

> **Important:** The virtual meeting providers are deactivated by default. Change the **Active** status of the desired virtual meeting provider to **true** to start using.

To configure a virtual meeting provider, you must have the following flows already created to use for the virtual meeting provider:

- Create meeting
- Cancel meeting
- Get meeting details
- Update meeting
- Get recording

For more information on how to create a flow, refer to Create a flow.

Role required: sn_wsd_rsv.admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Virtual Meeting Providers**.
2. Click **New**.
3. On the form, fill in the fields.

Virtual Meeting Provider form

Field	Description
Name	Name of the virtual meeting provider.
Create meetings	Flow to create a meeting.
Cancel meeting	Flow to cancel the meeting.
Get meeting detail	Flow to get the meeting details.

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Field	Description
Provider identifier	URL that must be used to validate the generated meeting links. When a meeting is created in the employee's calendar provider, the specified URL is used to validate the meeting link during the synchronization with Workplace Reservation Management.
Application	Application for which you are adding the virtual meeting provider. This field is automatically set. Ensure that **Workplace Reservation Management** is selected.
Update meeting	Flow to update the meeting.
Get recording	Flow to get the recording of the meeting.
Order	Order in which the virtual meeting provider must appear.
Active	Option to activate the virtual meeting provider.

4. Click **Submit**.

Result

The virtual meeting provider is added. To enable employees to add a virtual meeting link along with their reservation, select the **Virtual meeting provider** option in the Reservable module.

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Note: When a reservation includes a virtual meeting link, then the meeting link will appear as follows when it is synced with the Microsoft Outlook calendar provider of the attendees:

- Zoom: If a Zoom meeting link is added, the link appears in the **Location** field of the email containing the meeting invite.
- Microsoft Teams: When a reservation is created with a virtual meeting link, the application retrieves the meeting link and the joining-related details and saves them on the reservation record. When this reservation is synchronized with Microsoft Outlook calendar, the meeting link and the joining-related details are added to the body of the calendar event. Similarly, when a reservation is created in the Microsoft Outlook calendar using the **Teams meeting** toggle button, the meeting link is retrieved and saved as a virtual meeting link on the reservation record.

  Note: As the meeting link appears in the body of the email, in any case, if you want to update or change the meeting details, you must do it only using the Workplace Reservation Management. Because when a reservation synchronization is performed, the details (in this case, the meeting link and details) are synchronized only in one way, that is, from Workplace Reservation Management to the calendar provider(in this case Microsoft Teams). If you already made any changes to the meeting details or the notes from the calendar provider, it is overwritten by Workplace Reservation Management when a synchronization is performed. For more information, refer to Explore Workplace Calendar Synchronization.

- **Any other virtual meeting providers**: The meeting link is added in the **Location** field of the email containing the meeting invite.

For the meeting link to appear as above, the following plugin versions are required:

- Microsoft Exchange Online spoke version 3.5.0 and later.
- Microsoft Teams Communications spoke version 1.3.0 and later.
- Latest version of Workplace Reservation Management application.

Configure Microsoft Teams as virtual meeting provider

Set Microsoft Teams as your virtual meeting provider.

Before you begin

- Ensure the following:
  - Update the Workplace Reservation Management application only after installing the Microsoft Teams spoke. Otherwise, you must repair the Workplace Reservation Management application.
  - Microsoft Teams works only with a Microsoft account (Exchange Online, Exchange OnPrem). If you have both Google and a Microsoft Teams account, the virtual meeting provider cannot be added. If you want to create a Microsoft Teams account, you must create a Microsoft account. The Microsoft Teams account is mapped to the Microsoft account and not to the Google account.
  - For Microsoft Teams, to create a meeting link on behalf of other users, refer to Microsoft documentation.

The Workplace Reservation Management application provides the **Template** virtual meeting provider by default. After you setup a connection between Workplace Reservation Management and Microsoft Teams, the system, by default, provides the **Microsoft Teams** virtual meeting provider configured with the following flows:

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Microsoft Teams - Flows

Field	Flow
Create meeting	`Create Microsoft Teams Meeting`
Get meeting details	`Get MS Teams Thread ID`
Get recording	`Get Microsoft Teams Recording`

For more information on how to create a flow, refer to Create a flow.

Important: The virtual meeting providers are deactivated by default. Change the **Active** status of the desired virtual meeting provider to **true** to start using.

Role required: sn_wsd_rsv.admin

Procedure

1. Connect Workplace Reservation Management and Microsoft Teams.
   To create a connections, refer to Connect Workplace Reservation Management with Microsoft Teams.
   After the connection is configured, the application by default provides with the **Microsoft Teams** virtual meeting provider.
2. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Virtual Meeting Providers**.
3. Select **Microsoft Teams**.
4. On the form, to activate, select the **Active** check box.

Result
Microsoft Teams is set as the virtual meeting provider.

Connect Workplace Reservation Management with Microsoft Teams

Establish connection between Microsoft Teams Communications and Workplace Reservation Management.

Before you begin
Ensure that the following plugins are installed:

- Microsoft Teams Communications spoke (for creating meeting links)
- Microsoft Teams Graph Spoke (to get recordings)
- Workplace Reservation Management

Role required: admin

Procedure

1. Authenticate Microsoft Teams with Microsoft Azure.
2. For Microsoft Teams, to create a meeting link on behalf of other users, refer to Microsoft documentation.
3. Setup OAuth connectivity with Microsoft Teams Connections spoke for virtual meeting.
4. Setup OAuth connectivity between ServiceNow and Microsoft Teams Graph.

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5. Create credential for Microsoft Teams Communication.
6. Create connection and credential for Microsoft Teams Graph.

Authenticate Microsoft Teams with Microsoft Azure

Set up authentication with Microsoft Azure to connect Microsoft Teams with Workplace Reservation Management application.

Before you begin

Role required: Azure Active Directory administrator

About this task

In order for Workplace Reservation Management to be able to generate Microsoft Teams meeting link and get the recordings, via Microsoft Graph API, permissions must be added.

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. **Optional:** If you do not have an app registration, click **New registration**.
   a. On the form, enter the **Name** of the registration.
   b. Select the **Supported account types** of your choice.
   c. **Optional:** Specify the **Redirect URL**.
   Specify the following details:
      i. Select the platform as **Web**.
      ii. Enter the URL in the following format: https://<instance-Name>.service-now.com/oauth_redirect.do
4. If you already have an app registration, select the app registration.
   a. Navigate to **Manage** > **Authentication**.
   b. Navigate to **Add a platform** > **Web applications** > **Web**.
   c. On the Configure Web form, fill the fields.

Configure web form

Field	Description
Redirect URL	Enter a URL in the format: https://[instance].service-now.com/oauth_redirect.do
Implicit grant	Check **Access tokens**, and **ID tokens**

   d. Click **Configure**.
5. Add a client secret.

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a. Navigate to **Manage** > **Certificates and secrets**.

b. Click **New client secret**

c. In the **Description** field, enter a short description about the secret.

d. Under **Expires**, select an expiry.

e. Click **Add**.

f. After adding, in the Client secrets section, copy the value by clicking **Copy to clipboard**.

6. Add a permission.

a. Navigate to **Manage** > **API permissions**.

b. Click **Add a permission**.

c. Select **Microsoft Graph**.

d. Select **Application permissions**.

Application permissions

Permission name	Description	Required to
User.Read.All	Read all users profiles	Create virtual meeting link
OnlineMeetings.ReadWrite.All	Read and create online meetings	Create virtual meeting link
Directory.Read.All	Read directory data	Create virtual meeting link
Chat.Read.All	Read all chat messages **Note:** This is optional and is required only to retrieve meeting recordings.	Retrieve meeting recording

e. Select **Chat.Read.All**, **Directory.Read.All**, **OnlineMeetings.ReadWrite.All** and **User.Read.All**.

Note: Select **Chat.Read.All** to retrieve the meeting recordings.

f. Click **Add permissions**.

g. On the Configured permissions screen, click **Grant admin consent for ServiceNow**.

h. Click **Yes**.
A confirmation message is displayed that admin consent is granted for the requested permissions.

7. Configure application access policy and allow applications to access online meetings.

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a. Open the Windows' PowerShell as an administrator to run scripts.

b. Identify the app's application (client) ID and the user IDs of the users on whose behalf the app is authorized to access online meetings.

c. Connect to Skype for Business PowerShell with an administrator account.

d. Create an application access policy containing a list of app IDs.
Run the following cmdlet, replacing the Identity, AppIds, and Description (optional) arguments.

```
New-CsApplicationAccessPolicy -Identity Test-policy
 -AppIds "ddb80e06-92f3-4978-bc22-a0eee85e6a9e",
 "ccb80e06-92f3-4978-bc22-a0eee85e6a9e",
 "bbb80e06-92f3-4978-bc22-a0eee85e6a9e" -Description
 "description here"
```

e. Grant the policy to the user to allow the app IDs contained in the policy to access online meetings on behalf of the granted user.
Run the following cmdlet, replacing the PolicyName and Identity arguments.

```
Grant-CsApplicationAccessPolicy -PolicyName Test-policy
 -Identity "748d2cbb-\
3b55-40ed-8c34-2eae5932b22a"
```

f. **Optional:** Grant the policy to the whole tenant (Applies to users who don't have an application access policy assigned).
Run the following cmdlet, replacing the PolicyName argument.

```
Grant-CsApplicationAccessPolicy -PolicyName Test-policy
 -Global
```

Note: All employees who can create or update reservations must be included in the application access policy.

Result
The Microsoft Teams is set up with Microsoft Azure.

Note: For more information about allowing applications to access online meetings, see Microsoft documentation.

Setup OAuth connectivity with Microsoft Teams Connections spoke for virtual meeting

Register your Microsoft Teams Communications spoke with ServiceNow instance for OAuth authorization.

Before you begin
Ensure the following:

- Authenticate Microsoft Teams with Microsoft Azure
- Change the application scope to Microsoft Teams Communication spoke.

Role required: admin

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Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Click **New**.
3. Click **Connect to a third-party OAuth provider**.
4. On the form, fill in the fields:

Third-party OAuth Provider form

Field	Description
Name	Unique name to identify the record, for example, Microsoft Teams Communications.
Client ID	Client ID created during the app creation. You can copy it from **Application overview** in the Microsoft Azure portal.
Client Secret	The password you generated when creating the app in Microsoft Azure.
Default Grant Type	Grant type used to establish the token. Select **Client Credentials**.
Authorization URL	OAuth authorization code endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/authorize`.
Token URL	OAuth server token endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/token`.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

5. Right-click in the form header and click **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, `Microsoft Teams Communication default_profile`.
6. Update the OAuth entity profile.
   a. Select the default OAuth entity profile.
   b. On the form, in the OAuth Entity Profile Scopes related list, double-click **Insert a new row...**.
   c. In the OAuth Entity Scope field, click the Search icon.
   d. In the OAuth Entity Scope window that opens, click **New**.
   e. On the form, fill in the fields.

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OAuth Entity Scope

Field	Description
Name	Enter a descriptive name, for example, MS Teams Communications.
OAuth provider	Provider associated with this scope, for example, MS Sync.
OAuth scope	The scope that you are granted by the provider. Enter `.default` .

f. Click **Submit**.

7. Save the changes.

Result
The OAuth registration is added for Microsoft Teams Communications spoke.

Setup OAuth connectivity between ServiceNow® and Microsoft Teams Graph

Register your Microsoft Teams Graph with your ServiceNow® instance for OAuth authorization to get recordings after a virtual meeting.

Before you begin
Authenticate Microsoft Teams Graph with Microsoft Azure. Follow the similar procedure explained in Authenticate Microsoft Teams with Microsoft Azure.

Role required: admin

Procedure
1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **Microsoft Teams Graph**.
3. On the form, edit the following fields:

Third-party OAuth Provider form

Filed	Description
Client ID	Client ID created during the app creation. You can copy it from **Application overview** in the Microsoft Azure portal.
Client Secret	The password you generated when creating the app in Microsoft Azure.
Authorization URL	OAuth authorization code endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/authorize`.
Token URL	OAuth server token endpoint. Enter `https://login.microsoftonline.com/`

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Filed	Description
	`<tenant_id>/oauth2/v2.0/token>`.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

4. Right-click in the form header and click **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, `Microsoft Teams Graph default_profile`.
5. Save the changes.

Result
The OAuth registration is added for Microsoft Teams Graph.

Create credential for Microsoft Teams Communication

Setup credentials for Microsoft Teams Communication spoke.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Click **New**.
   The system displays the message, `What type of Credentials would you like to create?`
3. Select **OAuth 2.0 Credentials**.
4. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Description
Name	Name to uniquely identify the record.
Active	Option to actively use the credential record.
OAuth Entity Profile	OAuth profile created in the application registration of the provider.
Applies to	MID Servers that can use this credential. For example, select **All MID Servers**.
Order	Order that the credentials are used. For example, enter 100.
Credential alias	Unlock, search and select the `sn_msteams_com_spk.MSTeamsCommunicationsSp` Connection & credential alias record.

5. **Save** the form.
   Right-click the form header and click **Save**.
6. To generate the OAuth token, click the **Get OAuth Token** related link.

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Create connection and credential for Microsoft Teams Graph

Setup connection and credentials alias for Microsoft Teams Graph.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Click **New**.
   The system displays the message, `What type of Credentials would you like to create?`
3. Select **OAuth 2.0 Credentials**.
4. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Description
Name	Name to uniquely identify the record.
Active	Option to actively use the credential record.
OAuth Entity Profile	OAuth profile created in the application registration of the provider.
Applies to	MID Servers that can use this credential. For example, select **All MID Servers**.
Order	Order that the credentials are used. For example, enter `100`.

5. **Save** the form.
   Right-click the form header and click **Save**.
6. To generate the OAuth token, click the **Get OAuth Token** related link.
7. Create a connection.

   a. Navigate to **All** > **Connections & Credentials** > **Connection**.

   b. Click **New**.

   c. On the form, fill in the fields.

HTTP(s) connection form

Field	Description
Name	Name to uniquely identify the record. For example, `Exchange Connection`.
Credential	Credential record created for this connection.
Connection alias	Alias record associated with this connection. Select

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Field	Description
	`sn_msteams_ahv2.Microsoft_Teams_Spoke` Connection & credential alias record.
URL builder	**Note:** Do not select the check box.
Connection URL	Connection URL. Enter `https://graph.microsoft.com`.
Use MID server	Option to use a MID Server. If the check box is selected, define the fields in the Advanced MID Server Configuration related list.
Active	Option to actively use the connection.
Domain	Domain that the action or activity runs in.

d. Click **Submit**.

Connect Workplace Reservation Management with Zoom

Establish connection between Zoom and Workplace Reservation Management.

Before you begin

Ensure that the following plugins are installed:

- Zoom spoke
- ServiceNow Integration Hub Action Template - Data Stream (for getting recordings)
- Workplace Reservation Management

Role required: admin

Procedure

1. Setup Zoom to enable virtual meeting.
   Refer to the Create a connected app in Zoom topic in Set up the

   Note: While setting up zoom, ensure the following:
   - Copy the url specified in **Redirect URL for OAuth** to **Add allow list** as well.
   - Select the following scopes:
     - In **Meeting**, select the following:
       - **View and manage sub account's users meetings (meeting: master)**
       - **View and manage all user meetings (meeting:write:admin)**
     - In **Recording**, select **View all users recordings (recording:read:admin)**

   .
2. Setup OAuth connectivity between ServiceNow and Zoom.
3. Create connection and credential for Zoom.

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Setup OAuth connectivity between ServiceNow and Zoom

Register Zoom with ServiceNow instance for OAuth authorization to get create virtual meetings and get recordings after a virtual meeting.

Before you begin

Ensure the following:

- Setup Zoom to enable virtual meeting.

  Refer to the Create a connected app in Zoom topic in Set up the .

  Note: While setting up zoom, ensure the following:
  - Copy the url specified in **Redirect URL for OAuth** to **Add allow list** as well.
  - Select the following scopes:
    - In **Meeting**, select the following:
      - **View and manage sub account's users meetings (meeting: master)**
      - **View and manage all user meetings (meeting:write:admin)**
    - In **Recording**, select **View all users recordings (recording:read:admin)**

- Set the application scope to Zoom spoke.

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **Zoom**.
3. On the form, update the following fields.

Application Registries form

Filed	Description
Client ID	Client ID created during the app creation. Copy from the **Application credentials** in Zoom.
Client Secret	Client secret created during application registration.
Default Grant Type	Grant type used to establish the token. Select **Authorization code**.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

4. Right-click the form header, and click **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, `Zoom default_profile`.
5. Save the changes.

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Result
The OAuth registration is added for Zoom.

Create connection and credential for Zoom

Setup connection and credentials alias for Zoom.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Credentials**.
2. Click **New**.
   The system displays the message, `What type of Credentials would you like to create?`
3. Select **OAuth 2.0 Credentials**.
4. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Description
Name	Name to uniquely identify the record.
Active	Option to actively use the credential record.
OAuth Entity Profile	OAuth profile created in the application registration of the provider. For example, Zoom default_profile
Applies to	MID Servers that can use this credential. For example, select **All MID Servers**.
Order	Order that the credentials are used. For example, enter `100`.

5. **Save** the form.
   Right-click the form header and click **Save**.
6. To generate the OAuth token, click the **Get OAuth Token** related link.
7. Create a connection

   a. Navigate to **All** > **Connections & Credentials** > **Connection**.

   b. Click **New**.

   c. On the form, fill in the fields.

HTTP(s) connection form

Field	Description
Name	Name to uniquely identify the record. For example, `Zoom Connection`.
Credential	Credential record created for this connection.

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Field	Description
Connection alias	Alias record associated with this connection. Select `sn_zoom_spoke.Zoom` Connection & credential alias record.
URL builder	**Note:** Do not select the check box.
Connection URL	Connection URL. Enter `https://api.zoom.us`.
Use MID server	Option to use a MID Server. If the check box is selected, define the fields in the Advanced MID Server Configuration related list.
Active	Option to actively use the connection.
Domain	Domain that the action or activity runs in.

d. Click **Submit**.

Display permanent seat assignments on floor maps

Display permanent space assignments along with employee names on maps.

Before you begin

Verify that you've installed the following to display permanent seating assignment on the map:

- Indoor Mapping
- Workplace Space Mapping
- Workplace Case Management

Employees must have a dedicated workspace allocation in their workplace profiles. Permanent seats along with employee names are displayed on the map based on the following considerations:

- If an employee is assigned two or more workspaces, then only the primary work location is displayed on the map.
- If privacy settings are enabled for an employee, the employee name isn't displayed on the floor map. Selected space shows **Private user**.
  - If two employees are sharing a space with privacy settings enabled, the floor map for a selected space doesn't show the employee name but shows **Private user**.
  - If two employees are sharing a space and only one of them has the privacy settings enabled, the floor map shows **Private user** for the employee who has privacy enabled.

Role required: admin

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Procedure

1. To enable permanent seat assignment display on the floor maps, enable the following map property and place type field options:

   a. Navigate to **All** > **Space Mapping** > **Map properties.**.

   b. Select the edit page option on the Map properties page.

   c. Select **Enable display of permanent seat assignments on map** (sn_wsd_space_map.display_seat_assignment).

   > **Note:** This property is displayed in the Map properties menu only when the Workplace Indoor Mapping plugin is installed.

   d. Select **Yes** to enable the property.

   Activating this property to display permanent seat assignments along with employee names on floor maps. By default, this property is set to **No**.

2. Navigate to **All** > **Workplace Reservation Management**.

   a. The following web application widgets display the permanent seat assignments on a map:
   - Make a reservation
   - Space Details
   - Location Directory
   - General request (Order something)

3. On the Make a reservation page, perform the following steps:
   For more information about how to make a reservation or update an existing reservation, see Create a reservation.

   a. Select a location and building.

   b. Select a space from the search result.

   c. Select **Map view**.

   d. On the map, select a floor from the **Floor** drop-down list.

   e. Zoom in to display spaces.

   f. On the map, select the **gear settings icon ( )**.

   g. Enable the **Display employees permanent seat assignments on floor maps** toggle button.

   h. Select **Apply**.

   The map shows permanent seat assignments for employees along with their names.

4. From the Reservation Portal home, select the **Location Directory** widget.

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You can access the Location Directory widget from the Employee Center portal. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace Services** > **Site Safety** > **Location Directory**.

a. On the Interactive floor map, select a location and floor from the drop-down options.

b. Zoom in to see spaces or permanent seating assignments for employees.

c. On the map, select the **gear settings icon ( )**.

d. Enable the **Display employees permanent seat assignments on floor maps** toggle button.
Employee names along with their assigned seats are displayed for a selected space.

5. Navigate to **All** > **Self-service** > **Employee Center** > **Workplace Services** > **General Request** to browse the workplace service catalog and request workplace services.

a. On the General Request form, fill in the request details and select the clickable link **Find the space on a floor map**.
Select a space and open the **Find the space on a floor map** link to view an interactive floor map.

- Request a desk change.
- Request furniture.
- Submit a general request.

a. Select **Request a desk change**.

b. Complete the steps for a move request.
For more information, see Raise a move request for a space change.

c. Select the **Find the space on a floor map** link.

d. Select a building and floor on the interactive floor map.

e. Zoom in and select a space.

f. On the map, select the **gear settings icon ( )**.

g. Enable the **Display employees permanent seat assignments on floor maps** toggle button.
Employee names along with their permanent seats are displayed for a selected space.

a. Select **Request a furniture.**

b. Complete the steps for ordering furniture or equipment.
For more information, see Request furniture for a space.

c. Select the **Find the space on a floor map** link.

d. Select a building and floor on the interactive floor map.

e. Zoom in and select a space.

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f. On the map, select the **gear settings icon ( )**.

g. Enable the **Display employees permanent seat assignments on floor maps** toggle button. Employee names along with their assigned seats are displayed for a selected space.

a. Select **Submit a general request.**

b. Complete the steps for submitting a general workplace service request. For more information, see Raise help request for a workplace inquiry.

c. Select the **Find the space on a floor map** link.

d. Select a building and floor on the interactive floor map.

e. Zoom in and select a space.

f. On the map, select the **gear settings icon ( )**.

g. Enable the **Display employees permanent seat assignments on floor maps** toggle button. Employee names along with their assigned seats are displayed for a selected space.

6. Navigate to the My favorites page from the Employee Center page.

a. Select a favorite space or navigate to **Workplace services** > **Quick Links** > **Create reservation**.

b. To make a reservation, enter the required information. For more information, see Set a location as favorite using the Space details page.

c. Select **Map view**.

d. On the map, select the **gear settings icon ( )**.

e. Enable the **Display employees permanent seat assignments on floor maps** toggle button. Employee names along with their assigned seats are displayed for a selected space.

Display name of the person reserving a space

Display the name of a person who booked a space on the floor map.

Before you begin

On the floor map, when a space is booked, an option to display the name of the person who reserved the space is available.

Ensure that the following plugins are installed:

- Workplace Core
- Indoor Mapping
- Workplace Reservation Management

Role required: admin

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Procedure

1. In the navigation filter search context, enter **sys_properties.list**.

   List of properties in the System Properties [sys_properties] table appears.

2. Search for **sn_wsd_core.floor_plan.portal.show_reservation_details** and set the Workplace Core property **sn_wsd_core.floor_plan.portal.show_reservation_details** to **true**.
3. Make a reservation or check for an existing reservation in Workplace Reservation Management.

   For more information, see Create a reservation.

4. On the Map view, select the location, building, and a floor where you have made the reservation.
5. Select the map gear settings icon ( ) to view Display options.
6. Select **Show name of the person who booked the space**.
7. Select **Apply**.

   Reserved or booked spaces show the name of person who booked the space.

8. Select a reserved space to open the Space details page
   Name of the person who booked or reserved the space is shown.

Manage check-in and check-out reservations

Reservation check in and check- out reminders are managed through the Check-in and check out reminder scheduled jobs

The following properties are being used in this scheduled job:

- sn_wsd_rsv.time_before_check_in_out_reminder
- sn_wsd_rsv.time_when_reservation_cancelled_without_check_in

Ensure check-in is required on the Reservable module at the space level. For more information, see Configure a reservable module.

- This can be enforced through the Reservable Module property value *`Override check-in policy`*" on the Reservable Module to **always require check-in**
- This can be managed at the space level. Space is indicated as check-in required. Set *`Override check-in policy`* on the Reservable Module to **no override**.
- On the Reservation summary page, the check-in state should be set to **awaiting_check_in**.
- Reservations are only cancelled when the *`Cancel reservations exceeding check-in time`* check box is selected on the Reservable Module
- The check-in and check-out schedule job runs every 30 minutes by default. It takes into account all the workplace reservations that require check-in or check-out, and validates the next action.

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Check-in Check-out process

Check-in required	Within time_before_check_in_o is 30min by default	Within time_when_reservation_ is 30min by default	Action
No	Yes	No	Reservation is not handled by the scheduled job.
Yes	No, before start time	No	No action required.
Yes	Yes, 10 minutes past reservation start time.	No	Employee receives an email notification. Template: Check-in Reminder PL
Yes	Yes	Yes, 40min past the reservation start time.	Reservation is cancelled.
Yes	Yes, 10 minutes past the reservation end time.	NA	If the reservation is checked in, employee receives an email notification. Template: Check-out Reminder PL

Note:

- Takes about 30 minutes (based on the default configuration) to receive an email notification for an employee who has not checked in the reservation.
- Takes about 60 minutes (based on the default configuration) for the reservation to be cancelled in case the employee did not check-in the reservation.

The daily scheduled job **Reservation daily tasks** closes all reservations at the end of the office working hours. Reservation may be closed the day after. The check-in state for reservations that are checked-in is indicated as **no_check_out**.

Configure automatic check-in for reserved spaces

Configure automatic reservation check-in using the Occupancy state of a location or space. If a location is using occupancy data sensors, it checks for Occupancy state of each space in the Space Occupancy data table

The Workplace Reservation Management scheduled job **Check-in/out reminder** runs every half an hour (30 minutes) daily. It checks for the location state (Occupied, Unoccupied, Invalid, currently not occupied, etc.) in the Space Occupancy data table. It also checks if the reservation is checked in or checked out. For more information, see Retrieving Space Occupancy Data.

Note: Reservation check-in and check-out is currently not supported for multi-location reservations (combining two or more reservations into one reservation). Check-in or check-out of reservations with multiple locations for the same date and time and with the same reservation owner is not allowed by the application. In case of group reservations, each space is assigned to a different employee, check-in for group reservations is also not allowed in bulk. You have to check-in a reservation one at a time.

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Role required: sn_wsd_rsv.admin

If the space state is Occupied, it triggers an automatic check-in process and sends an updated push notification to Workplace Service Delivery for Mobile "Your reservation for <location_name> has started. You are automatically checked in based on the presence detected at the space. No further action is required."

Navigate to **All** > *Workplace Reservation Management* > **Administration** > **Reservable Module** and ensure that the following properties are configured:

- The Override check-in policy: Select **Always require check-in**.
- Cancel reservations exceeding check-in time: Select the check box.
- Time before employee can check-in value: Enter a value. For example, 10 minutes.

In Reservation properties list (**All** > *Workplace Reservation Management* > **Administration** > **Properties**), configure the following properties:

- **The amount of time in minutes until a reminder should be sent to the reservation host** [sn_wsd_rsv.time_before_check_in_out_reminder]. For example, set the property value to 5 minutes.
- **The amount of time in minutes until a reservation is cancelled without a check-in** [sn_wsd_rsv.time_when_reservation_cancelled_without_check_in]. For example, set the property value to 30 minutes.

  For example, after setting the above properties and reservable module properties, if an employee creates a reservation at 5 pm, the application checks for the following conditions:

  - The Workplace Reservation Management application waits till 5.05 PM as per the value set in the property **Amount of time in minutes until a reminder should be sent out to the reservation host (sn_wsd_rsv.time_before_check_in_out_reminder)** to check whether the reservation is checked in or not.
  - After 5.05 PM, the scheduled job **Check-in/out reminder** checks the Space Occupancy data table to check if the reserved space (for example, A1001) is available in the Space Occupancy data table.
  - In the Workplace Connectors, the system property **sn_wsd_wc.stale_time** checks if the **Event Timestamp** field in the Space Occupancy data table has the latest timestamp. This property checks for the time beyond which the occupancy data is considered stale. Beyond the stale time, the fresh data is fetched from the Occupancy data provider (for example, Metrikus Spoke). If the **sn_wsd_wc_stale_time** property value is set to 30 minutes, application queries the Space Occupancy table and fetches the fresh data state for a location or space from Metrikus Spoke.

    If the state is **Occupied**, then, application automatically checks in the reservation. The reservation state moves to **In progress** state. A push notification is sent to Workplace Service Delivery for Mobile "Your reservation has started. You are automatically checked in based on the presence detected at the space. No further action is required."

  - When workplace spaces are having occupancy sensor and if the state of the space is unoccupied or Invalid, application sends push notification "Your reservation for Reservation for <space-name> has started. Check in to confirm your attendance or Release Booking to Cancel the space reservation".

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- When the workplace spaces are not having a occupancy sensor, and if the user does not check in the reservation, application cancels the reservation if the Reservable Module property **Cancel the reservation exceeding check in time** is selected.
- If the **Cancel the reservation exceeding check in time** is not selected, then the reservation is moved to **Confirmed** state, and the Workplace Reservation Management scheduled job **Reservation daily tasks** takes care of such reservations at the end of the day.

Configure reservation multi-day settings in Reservable Module

Set the Max days in future value for configuring reservation.

The option to create a multi-day reservation is configured by your administrator using the **Max days for multi-day** Reservable Module Configuration property. For more information, see Configure a reservable module. Multi-building selection is supported for multi-day reservation. For more information about multi-day reservation, see Create a multi-day reservation.

For multi-day reservation covering multiple days, the start date and end date span across multiple days (for example, Start date: October 12, 2023. End date: October 17, 2023). For more information, see Create a multi-day reservation.

- If your administrator has set a limit on the maximum days that you can reserve in future, you can't select days in the future beyond the set the date by the admin. A warning is displayed about the limitation.
- For example, if your administrator has limited the days of future to 45 days, you can't select a date beyond 45 days while making a recurring reservation. The number of days available for **End on this date** option differs based on the **Daily**, **Weekly**, or **Monthly** selections. The end date and time specified for recurring reservation are used to indicate the end date and time of the reservation.
- If no such limitation is set by your administrator on the future days in the Reservable module, you can select any date. This also depends on how many occurrences you can select and make.

> **Note:** You can't select a date beyond a duration that is configured in the Max days in the future reservable module. For example, if Max days in future value are 45, you can't select a date beyond this duration while making a recurring reservation. The number of days available for **End on this date** option differs based on the **Daily**, **Weekly**, or **Monthly** selections. If the **Max days in future** value isn't configured on the Reservable module, the date selection isn't restricted and employees can select a date based on the **Max number of occurrences** configuration.

Space and reservation planners (sn_wsd_rsv.reservation_planner) with the dedicated role (sn_wsd_rsv.bypass_module_validation) can ignore or bypass certain settings in the Reservable module configuration. For more information, see Allow Event planners to handle reservations with more flexibility.

For example, reservation planners or space planners with the dedicated role (sn_wsd_rsv.bypass_module_validation) can ignore or bypass the following settings in the Reservable module:

- Max days in the future
- Max number of occurrence
- Min and Max duration
- Available in
- All day

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Reserve workplace items

Make a reservation for a workplace location or any reservable item of your organization. Make a single, recurring or a group reservation using the Reservation portal.

Create a reservation

Create reservations across multiple buildings, campuses, neighborhoods, or sites. Create a reservation spanning across multiple days. Add attendees or visitors to a reservation. Synchronize reservation details and resolve conflicts when scheduling recurring reservation events. Add workplace services (room configurations, catering, and so on) to your reservation.

Before you begin

Install and configure the following:

- Workplace Core
- Workplace Central
- Workplace Space Management
- Workplace Case Management
- Workplace Indoor Mapping
- Workplace Visitor Management
- Workplace Maintenance Management

Role required: sn_wsd_core.workplace_user

About this task

Reserve a workplace space based on your office working hours.

Create a workplace reservation for a single day or for multiple days. Administrators can set the max days in future value in the **Reservable Module Configuration** tab. For more information, see Configure reservation multi-day settings in Reservable Module.

Space and reservation planners (sn_wsd_rsv.reservation_planner) with the dedicated role (sn_wsd_rsv.bypass_module_validation) can ignore or bypass certain settings in the Reservable module configuration. For more information, see Allow Event planners to handle reservations with more flexibility.

For example, reservation planners or space planners with the dedicated role (sn_wsd_rsv.bypass_module_validation) can ignore or bypass the following settings in the Reservable module:

- Max days in the future
- Max number of occurrence
- Min and Max duration
- Available in
- All day

Role: sn_wsd_core.workplace_user.

Procedure

1. Select any of the following context menu navigation options to make a workplace reservation.

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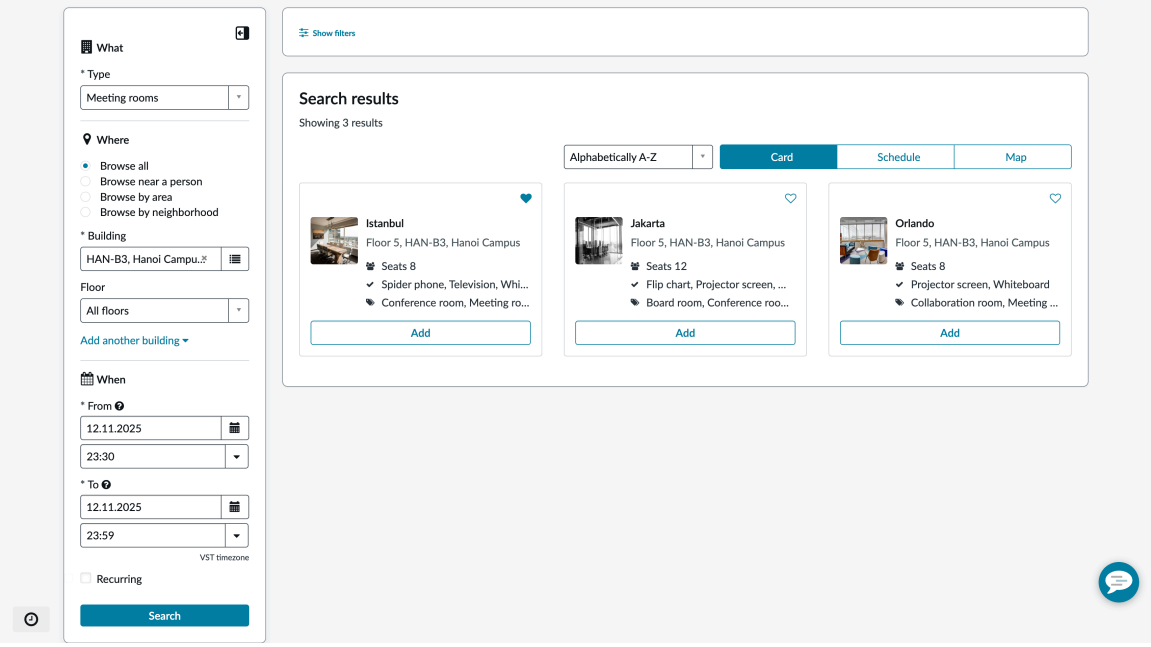
Location	Navigation path
From Employee Center Portal	○ Navigate to **All** > **Self-Service** > **Employee Center**. ○ On the Employee Center portal, select **Workplace Services** > **Browse Workplace Services**. ○ Select the **New general reservation** card. Make a reservation portal page opens for you to make workplace reservations.

The Make a Reservation page opens in a new tab.



2. From **Type**, select a Reservable Module configuration.

   For example, select any of the following Reservable Module configuraiton. For more information, see Configure a reservable module.

   - Desks
   - Desks with an Area
   - Meeting rooms require approval
   - Meeting rooms
   - Desks with a shift

3. From **Where**, select any of the Reservable paths:

   The following reservation paths are available for a selected Reservable Module.

   - Browse all
   - Browse near a person
   - Browse by area

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- Browse by neighborhood
- Browse all spaces

4. **Optional:** Select **Browse all**.
   The **Browse all** reservable path is selected by default.
   a. Search for a workplace item that you want to reserve using the following available criteria.
5. Complete the following information.

   On the form, fill in the fields.

Make a reservation form

Field Name	Description
Building	Name of the building for a selected campus. Select a building from the list. For example, Demo Campus. The building names and location names are alphabetically sorted or sorted according to the **Order** that you have configured on the Buildings and Regions tables. When a sort **Order** is configured for a building or region, the building names and locations are sorted accordingly. If the sorting **Order** value isn't specified for an item, the items are listed on top of the list (ascending order), and sorted alphabetically. The building names and location names are alphabetically sorted based on the label name. For example Building A, Building B, and so on.
Floor	Floor of a building where you want to make a reservation. The floor names are either alphabetically sorted or the values are sorted based on the indicated sort order. You can configure the sort **Order** in the Floors table. If the sorting **Order** value is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The Floor names are alphabetically sorted based on the names and labels.
From **Note:** The time directive fields (From, time, To) are also available on the MESP (Mobile Employee Service Portal) on the Now Mobile app.	Start date of your reservation. For a single day reservation, only the **From** field is shown and not the option to enter the end date. ○ Employees can't select a date and create a reservation if the start date exceeds the Max days in future Reservable module value. Thisn't value is configured on the Reservable module by your administrator. For more information, see Configure a reservable module.

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Field Name	Description
	When the Max days in future value is configured by your administrator, you can't select a date past the max allowed date. The dates in the calendar date picker are inactive for dates that are too far in future. **Note:** If the Max days in future value isn't configured, the date selection isn't restricted. Date selection is based on the Max number of occurrences value. For more information, see Configure a reservable module. ○ If you enter an invalid date which is greater than what is specified in the **Max days in future** value, the application resets the date to the current date.
Time	Start time when the reservation begins. Employees can select time using the drop-down list or by entering the time in the field. The time increment value depends on the value set by your administrator. Default reservation time duration available for selection is 30 minutes. The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Service Portal Widget instances. The start time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes. **Note:** You can't select a date that occurs in the past. The time for a selected location depends on the building time zone.
To	End date of your reservation. Employees can't select a date and create a reservation when the End date exceeds the Max days in future value. The Max days in future value specifies the maximum number of the days in the future up to which the Reservable module can be reserved. **Note:** In the case of a single day reservation, option to enter the end date isn't available.

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Field Name	Description
	If you enter an invalid date which is greater than what is specified in the **Max days in future** value, the application resets the date to the current date. **Note:** If the **Max days in future** value isn't enabled, then the date selection isn't restricted and is based on the **Max number of occurrences** value configured in the Reservable module. For more information, see Configure a reservable module.
Time	End time when you would stop using the workplace item. Employees can select the end time using the drop-down list or by entering the time in the field. The end time increment value depends on the value set by your administrator. Default reservation end time duration is 30 minutes. The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Service Portal Widget instances. The start time and end time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes. **Note:** You can't select a date that occurs in the past. For example, If the start time is 09:00, you can select an end time after this duration. You can't select a time before 09:00 on the same day. The time for a selected location depends on the building time zone.
All day	Option to reserve the workplace item for an entire day or a single day. This option appears if your Workplace administrator has enabled the All day reservation setting on the selected **Type**. The start and end times of the reservation depend on the timings set by your organization. The **All day** option is also available on the Space details page.

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Field Name	Description
	Note: The **All day** option's appearance depends on your administrator's configuration. If your admin has mandated all day reservation for a selected **Type**, the reservation is automatically made for the entire day. In case of All day you can only modify the Start date of the reservation.
Add another building	Reserve multiple workplace items spanning multiple buildings. The buildings time zones are different for a same date and time in a reservation. **Note:** This option is available if you have selected **Allow multiple reservations** check box on the **Reservable Module** > **Reservable Module Configuration** tab. For more information, see Create multi-building reservations.

6. **Optional:** Select Recurring to make a recurring reservation.

   (Optional) When making a recurring reservation, select the most suitable recurring pattern (Daily, Weekly, or Monthly) based on the space availability within the recurring series.

   Note: Reservations in a recurring series cannot be updated in bulk. To update a reservation from a recurring series, select a reservation and edit it as required. The option to make a recurring reservation is configured by your administrator. The *`Allow recurring reservations`* Reservable Module configuration option should be enabled for making recurring reservations. This option is dependent on the *`Max days in future`* and *`Max number of Occurrences`* value. For more information, see Configure a reservable module Reservations with single occurrences are converted to a single-day reservation.

   Shift-based reservable module configuration is not supported for Recurring reservations.

   Calculate and set a recurring meeting pattern define the frequency and recurrence pattern in the Add Recurrence dialog box.

   a. Set a start date, end date, and duration (start time and end time) for your reservation.

      For example:

      - Start date: Select 25/02/2026 as your reservation start date.
      - End date: Select 23/08/2026 as your reservation end date.
      - From: Select a start time for your reservation.

        (Optional) Duration or start time and end time depends on the selected building time zone.

      - To: Select a time when you want to end your meeting or reservation.

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The end time is based on the standard working hours (full day) of your office.

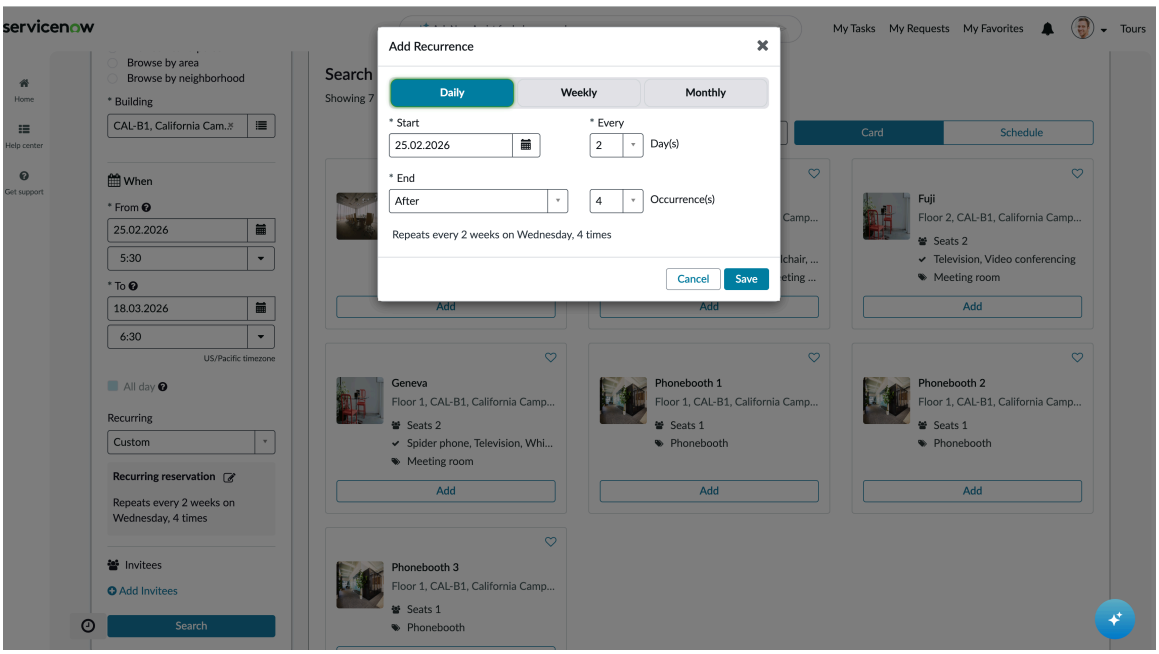
> **Note:** The start date is reset if you select a different start and end date in the Add recurrence dialog box. For more information, see Step c. It's recommended that you select the start and end dates prior to setting the recurrence patterns in the Add recurrence dialog box.

b. Select Recurring list options as required:

- **Daily**: Option to set daily recurring series.
- **Weekly on Wednesday**. This option label changes as per the weekday that you have selected as your start day. For example, selecting Wednesday as your meeting weekday shows **Weekly on Wednesday**.
- **Monthly on fourth Wednesday**. This option label changes as per the selected weekday. For example, selecting Wednesday as your meeting start day shows Monthly on fourth Wednesday.
- **Every weekday (Monday to Friday)**
- **Custom**: Customize your recurring reservation options as required for Daily, Weekly, or Monthly recurrences.

c. Select any of the following recurring patterns to open the Add recurrence dialog box and select the required recurring pattern:

i. Daily:The meeting occurs every day. You can define a repeat interval of every X days.



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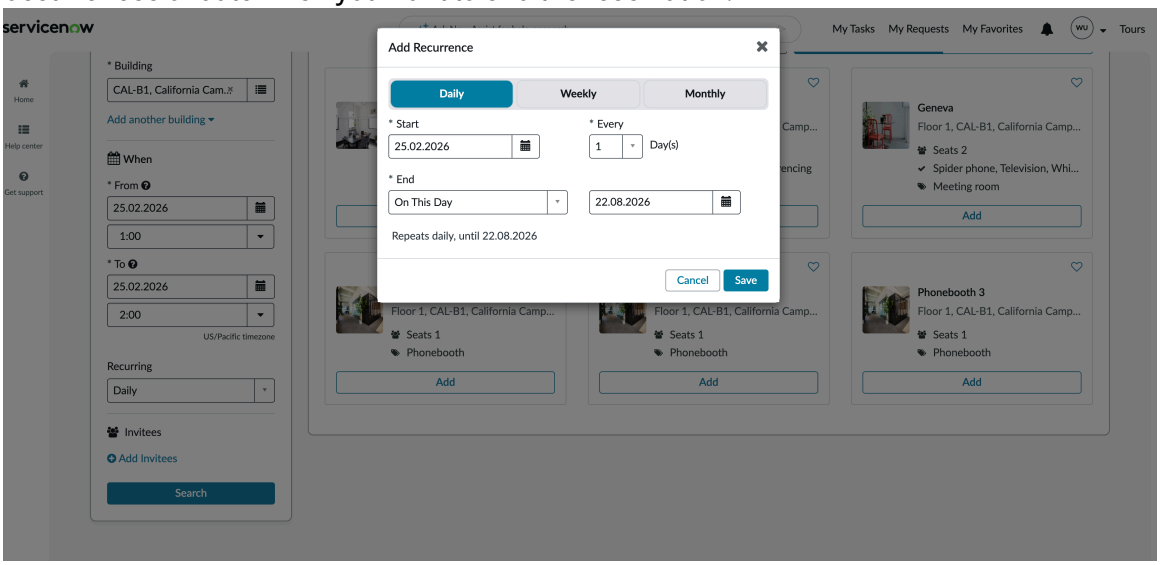
1. (Optional) In the Add recurrence dialog box, confirm that the start and end dates are correct. Select the required recurrence pattern.

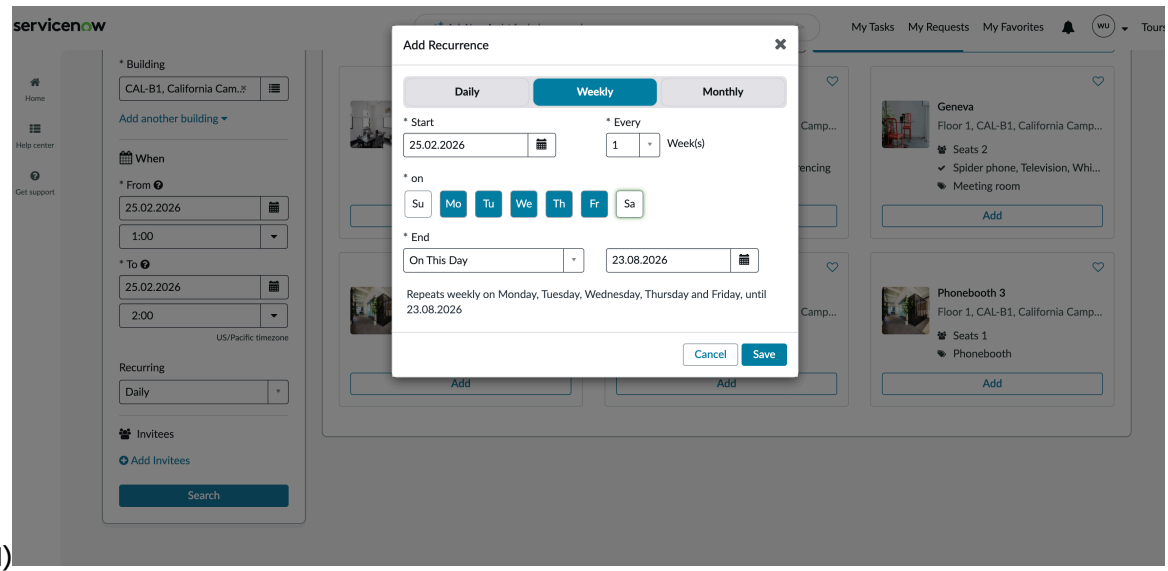
   Select the duration, repeat duration, and number of occurrences or date when you want to end the reservation.



2. (Optional) Select **Save**.

ii. Weekly: The meeting takes place on the same weekday each week. You can define a repeat interval of every X weeks. For example, select the following recurrence Pattern for weekly or biweekly reservations.

- Weekly, Every 1 week on Wednesday. The meeting occurs every Wednesday starting Feb 25, 2026, ending on Aug 19, 2026 (the last Wednesday before Aug 23). Confirm that the start and end dates are correct. Select the required recurrence pattern.



(Optional)

- Bi-Weekly (Every 2 Weeks). Every 2 weeks on a selected weekday. For example, bi-weekly on Wednesday.
- Select **Save** after selecting the required weekly recurring pattern and duration.

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If the reservation time duration has only one occurrence in case of weekly recurring reservation, the single occurrences are converted to a single-day reservation. For example, consider a recurring reservation from 13-02-2026 to 18-02-2026 set to repeat weekly once on every Monday. Since, in this duration, there's a single Monday when the reservation is scheduled to repeat weekly, it is considered as a single-day reservation.

iii. Monthly: Specific day of a month. For example, the last Wednesday of every 1 month. In the Add recurrence dialog box, confirm that the start and end dates are correct. Select the required recurrence pattern. You can define a repeat interval of every X Month. To select a day of the month, select **On**. Select from a date range, for example **29**, **30**, **31** or **Last day**

Day 29,30, and 31: You can only select these days for a month, if the selected dates are available for a selected month. For example, February and April are skipped by the application if you select the date as **31**. If you set it to the **Last day** option, it selects the last day of a month automatically.

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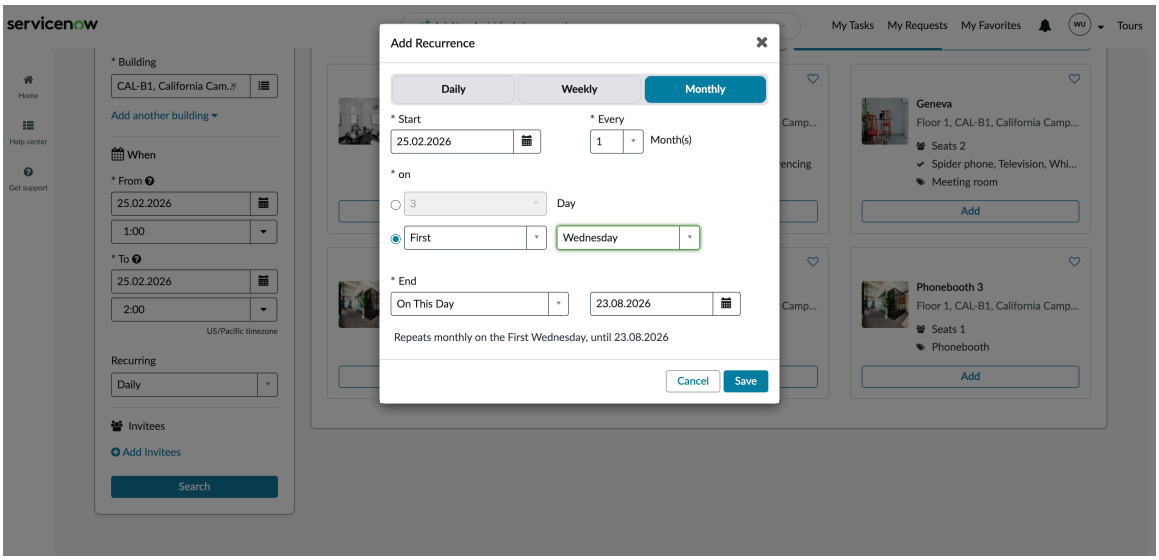

Note: If you select an invalid date range or number of occurrences for a recurring patter, the **Save** button is not available for selection. Reset the date range to save your changes.

d. Custom: Customize your recurring reservation options as required for Daily, Weekly, or Monthly recurrences.

Note: If you change the start and end time duration for a reservation after setting a recurring reservation, it resets the duration for the reservation. You should add or update the recurring series and pattern again.

Note: The option to set a recurring reservation pattern is also available on the My favorites page. Select a favorite space. On the Space details page, you can set a reservation to recurring.

Consider the following when selecting a recurrence pattern. For example, select a recurring reservation from Feb 25, 2026 - August 23, 2026:

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- Total Reservation Duration: The date range span covers approximately 179 days, which is about 25 weeks.
- Reservation End duration: If the pattern extends beyond the end date 23.08.26, application ends the reservation. You can choose to end the recurrence after a certain number of occurrences. The calendar doesn't allow you to select a range beyond what is specified in the *Max number of occurrences* reservable module property configuration.
- If your workplace manager has enabled time-bound allocations, the workplace availability changes based on the start and end date of an allocation. For example, if you select five recurring days, and the workplace is allocated for 3 out of the five days, the availability of the workplace is 3/5. Only the first occurrence of the recurring reservation is checked for time-bound allocations.

Upon confirming the required recurring reservation pattern and saving your changes, the Make a reservation portal page displays the recurring reservation duration selected by you.

To update or edit recurring reservation series, select the edit option to edit your recurring reservation.

Note: Recurring series cannot be edited. You can edit single reservation at a time and not the entire series.

7. Select Add Invitees.

   This option is available when your administrator has enabled the Reservable Module property configuration *Allow attendees based search* on the Reservation Widget Configuration. This option allows employees to add attendees to a reservation and search for their availability on the Make a reservation portal page. For more information, see Configure a reservable module and Add invitees as collaborators and create a reservation.

8. Select **Search**.
   Available spaces for reservations are displayed automatically. The first building card is selected by default in the search result.
9. **Optional:** The application performs auto-search for reservable items when the reservation property (*sn_wsd_rsv.enable_auto_search*) is enabled by your administrator.
   If an auto-search reservation property is configured by your administrator, the **Search** button is hidden on the reservation portal. The application searches for reservable locations and items automatically while creating a reservation. An auto- search is triggered when any of the following is changed or updated:
   - Reservable module.
   - Reservable paths.
   - Building.
   - Floor.
   - Start Date.
   - End Date.
   - All day.
   - Recurring (Daily/Weekly/Monthly)
10. **Optional:** Select **Refresh the results** manually to refresh the search results on the advanced reservation portal page while making a reservation.

    (Optional) When the auto-search property is enabled, the reservation portal search page shows a message to refresh the page when an employee stays too long on a page or when the

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search results are outdated. Select **Refresh the results** manually to fetch the latest reservation search results data.

11. Select the toggle option **Show Filters** to filter by:
    - Minimum Capacity: Filter by space capacity.
    - Services: Filter by Workplace Services
    - Purposes: Filter by Location purposes.
    - Floors: Filter by Floors for a selected building.

    Select **Apply** to apply the selected filter option.

12. **Optional:** Select **Alphabetically A-z** list option to sort the workplace items in an alphabetical order (Z-A or A-Z)

    The **My favorites First** sort option is automatically selected if you have favorite locations. Your favorite locations are displayed first in an alphabetical order followed by the other locations that match the search criteria.You can view and perform the following actions after you set a space as favorite:

    a. When searching for a space, you can sort the workplace items to display your favorite locations at first using the **My favorites first** sort option. By default, if you have favorite locations, the default sort option is set to **My favorites first**.

       The workplace items are sorted and all your favorite locations are displayed first in an alphabetical order.

    b. If you're browsing for a workplace location near a person, you can sort the workplace items to display your favorite locations first using the **My favorites first** sort option.

       The favorite locations are displayed based on the proximity closest to the person's location.

    Note: You can’t sort workplace items in alphabetical order or by your favorite locations if you're browsing spaces near a person. The spaces near a person are searched based on proximity.

13. Select a location or locations from Search Results.
14. View search results using the **Card**, **Schedule**, or **Map** tab.

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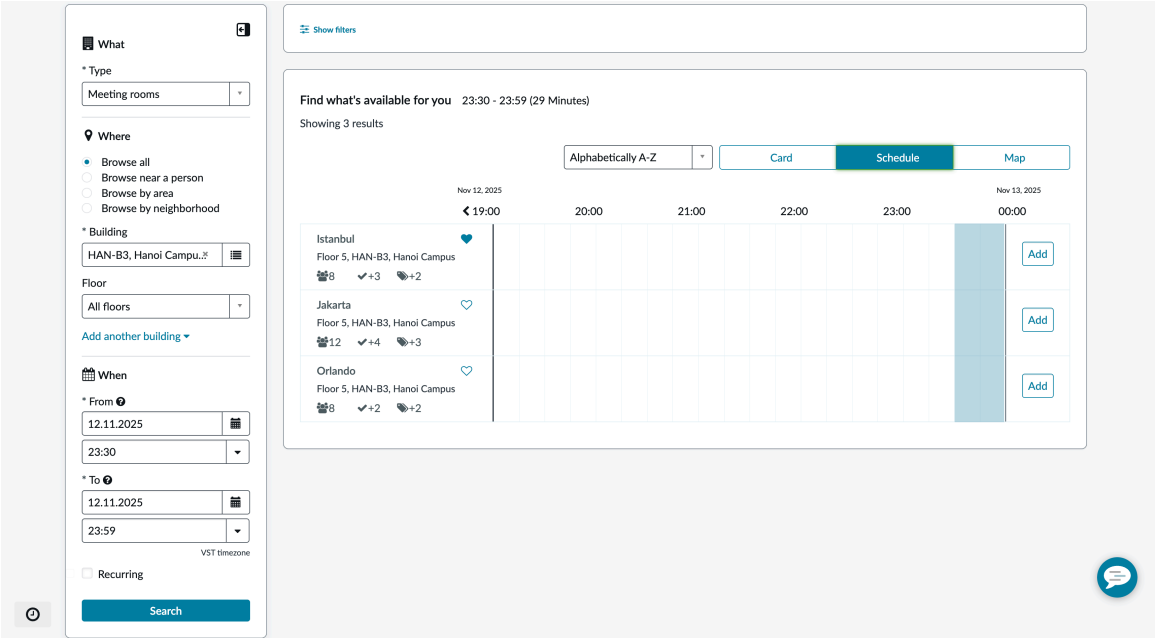
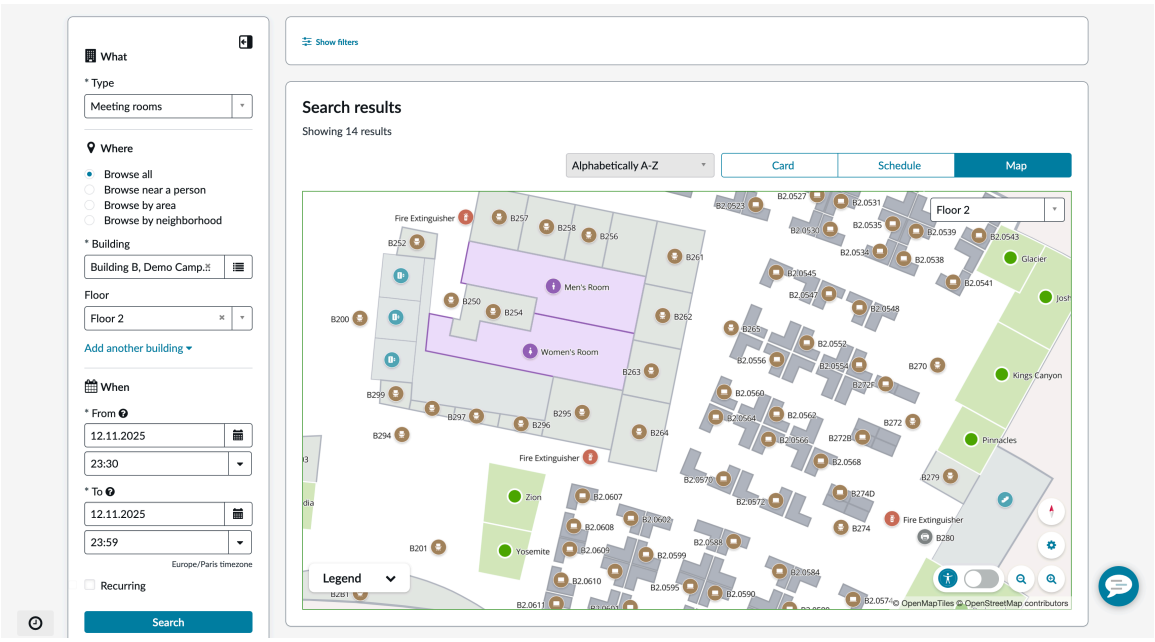


15. Select the workplace item that you want to reserve using any of the following options:

- Select the **Card**, **Schedule**, or **Map** tab.

  - Select a Campus on the Map.



  - Select a Floor from the drop-down list.

    The floor names are alphabetically sorted or sorted based on the sorting **Order**. The values are sorted based on the indicated sort order, if it's available. You can indicate the sort order in the Floors table. If the sorting Order value isn't specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The Floor names are alphabetically sorted based on the label names. For example Floor A, Floor B, and so on. For more information about sorting order, see Add a floor using Workplace Space Management.

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Note: If the **Order** is null for all available buildings in a selected campus, then floor names are alphabetically sorted based on floor name label. For example Floor A, Floor B, and so on.

- Zoom in to select a building and location

  The building names are alphabetically sorted or sorted according to the **Order** that you have configured in the Buildings table.

- Select a space and then, select **Add** to add a space.

  While reserving or viewing a space, the employee can see if a space is part of a neighborhood. The neighborhood icon ( ) is displayed on the space card.

  If your organization is using floor maps, you can view the floor maps for a location using Indoor Mapping as your map provider.

  .

  If you have selected the **Browse by neighborhood** option in Step 6, the reservation portal shows spaces for a neighborhood.

  When you browse by neighborhood, all spaces belonging to a neighborhood are displayed but you can only select available spaces within a neighborhood.

16. To show or hide spaces or layers on the Map, do the following:
    - Select a building or a floor on the Map.
    - Select the Filter out layers and places icon ( ) to filter out spaces and layers on the map.
    - From the **Display Options** list, select **Spaces** or **Layers** and clear to remove the selected spaces or layers from the Map View.
    - Select **Apply**.

    By default, all the spaces and layers are selected or checked.

    Note: The spaces and layers that are displayed on the floor map are based on the Layer types and Place types table configuration settings in Indoor Mapping. Navigate to **All** > **Indoor Mapping** > **Place types** or **All** > **Indoor Mapping** > **Layer types** to open the Places or Layer types page respectively. Set the Filter out layers and places **Filter out layers and places** column to **true** to display the places (spaces) or layers that you want to display on the floor map.

17. **Optional:** Select a space and mark a location as favorite by selecting the favorite icon ( ) on the space card.
18. Select **Next** to add spaces and make a reservation.

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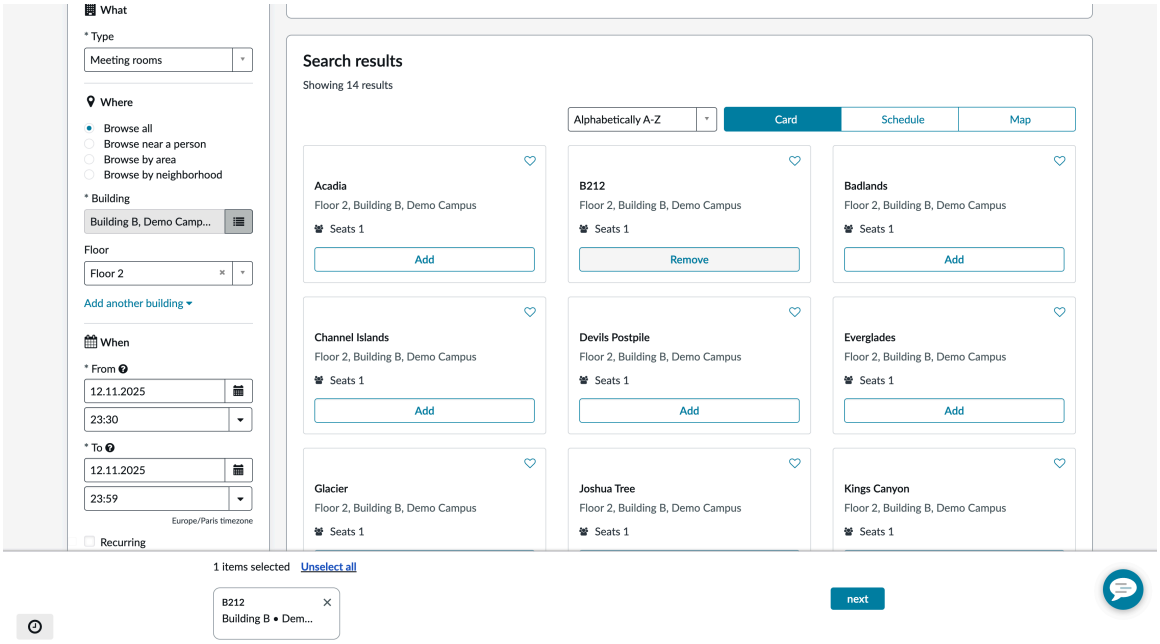
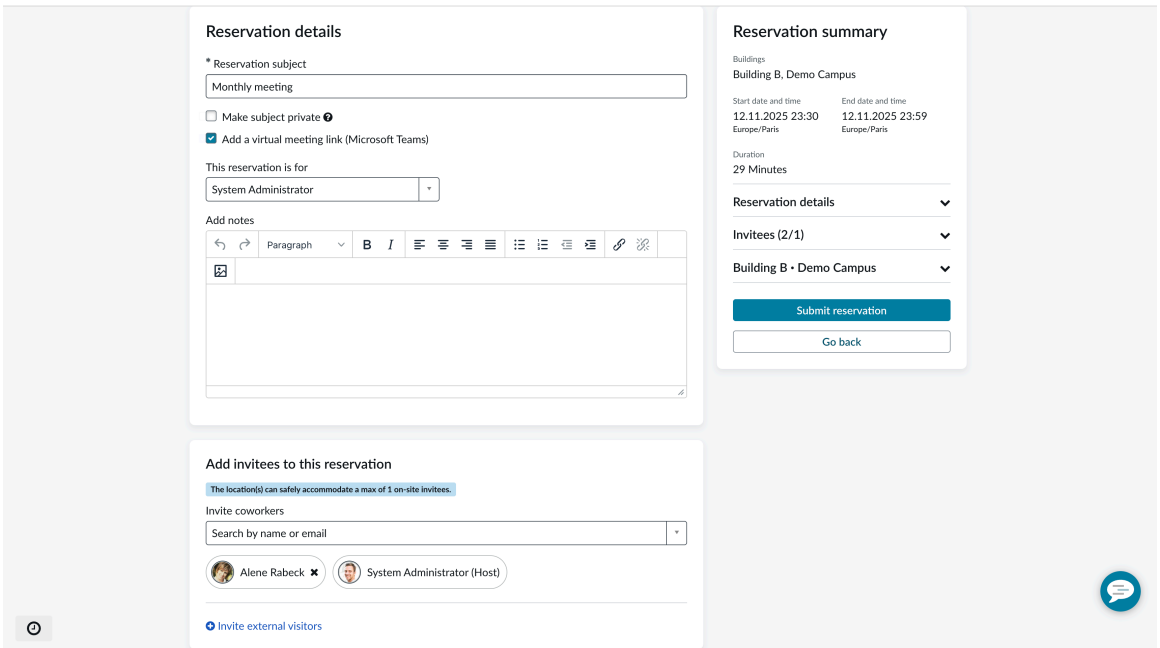


When you create a reservation in a sync-enabled space or location using Personal Authentication mode, a valid OAuth token is required to access your Microsoft Outlook or Google Calendar account.

Note: If you have activated Personal Authentication mode in Workplace Calendar Synchronization and attempt to reserve a sync-enabled space or location without a token, a pop-up notification is displayed informing you that the token is unavailable. To retrieve the token, log in using the respective email credentials: Microsoft Exchange Server credentials for Microsoft Outlook or Google Calendar credentials for Google Calendar.

Selected space is added to reservable items. The Reservation Details page opens.

19. On the Reservation Details form, fill in the fields.



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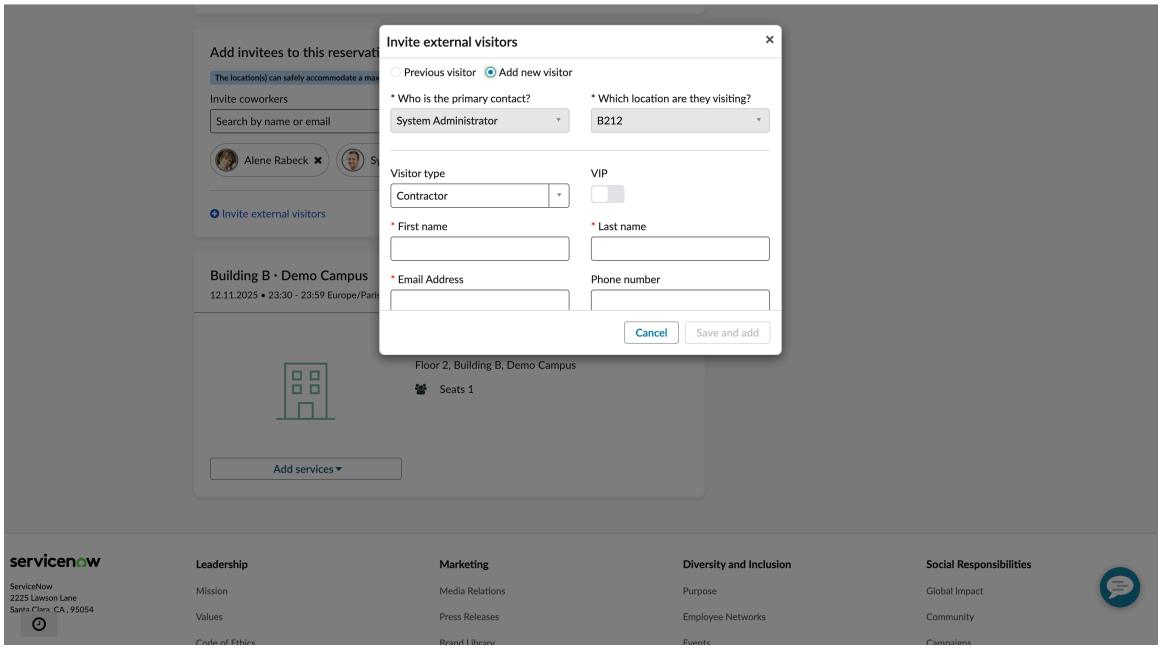

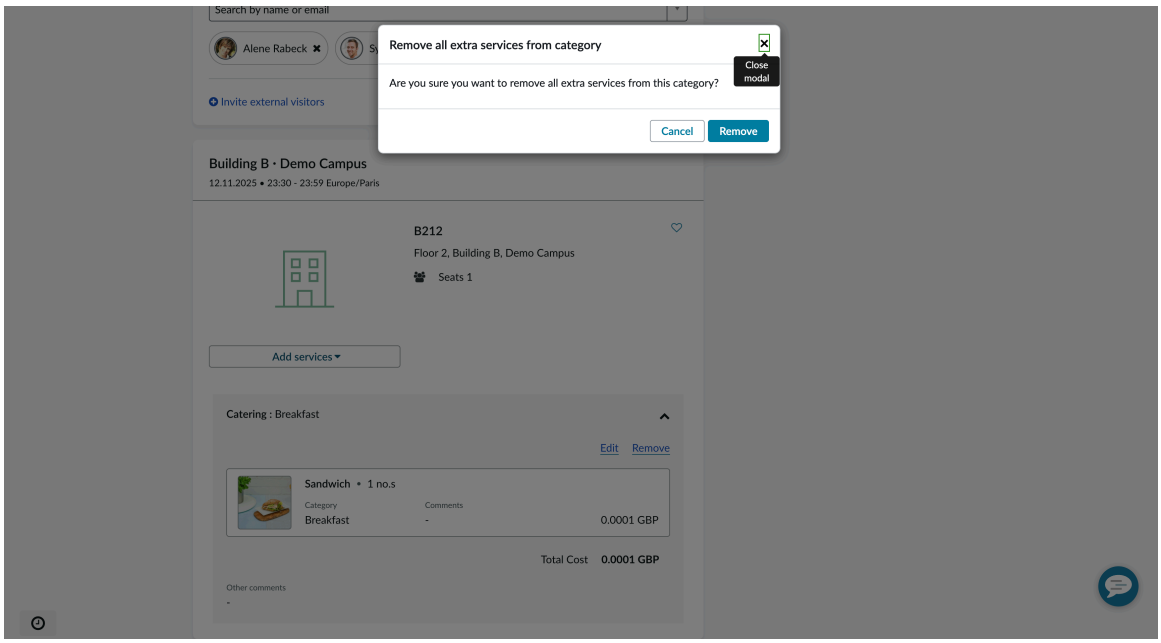

Reservation details from

Field	Description
Reservation subject	Subject of your meeting. For example, Status meeting.
Make subject private	Option to make reservation subject as private.
Make space details private	Option to set the space details of the space as private.

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Field	Description
	Note: The option is displayed based on the privacy setup of the space. If you have selected multiple spaces while adding a reservation, you can specify your privacy preference for each workspace individually by using the **Make space details private**.
Reserve these items together for the same person	Option to reserve all the workplaces for the same user. This option appears if you have selected multiple workplace items for reservation.
Add a virtual meeting link	Option to generate a virtual meeting link so that remote employees can join the reservation. **Note:** (Only applicable for Microsoft Teams) As of the May Store 2023 release, when adding a meeting link, the application retrieves the meeting details while synchronizing the event with a calendar provider.
This reservation is for	If you're requesting a reservation on behalf of your team member, select the name of that person. Leave this field empty if you're requesting a reservation for yourself.
Number of attendees	Number of people expected to attend the meeting.
Add notes	Option to add the meeting note to a reservation using the rich text editor. The notes can be shared with the meeting invitees. Users can also copy and paste text to the editor. The message can contain a maximum of 65,000 characters. Note is saved on the reservation record. You can update the note as required. The invitees receive a notification when note is added or updated. The reservation summary page shows the summary of the meeting note. This option is available only if your administrator has configured the **Allow reservation message** option on the Reservation module. For more information, see Configure a reservable module. \

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Field	Description
Add invitees to this reservation section	**Note:** This section appears only if your administrator has enabled the configuration to invite attendees to this workplace location on the Reservable module. This option doesn't appear if the **Number of attendees** option is available for a selected location.
Invite coworkers	Coworkers or team members are added to the meeting invite and are notified when this option is selected.
Invite external visitor	Option to invite an external visitor. **Note:** This option appears only when Workplace Visitor Management is installed and configured. The visitor details are automatically logged in the Workplace Visitor Management for the reception staff to perform visitor-related tasks. ○ If you have already registered a visitor, do the following: **a.** Select **Previous visitor**. **b.** In the **Select a prior visitor** field, select the visitor. You can also preview the visitor details and modify any details if necessary. The details are updated automatically in all the visitor-related records and registration records. ○ If you're registering a visitor for the first time, do the following: **a.** Select **Add new visitor**. **b.** Select the **Visitor type**. **c.** If the guest is a special guest, enable **VIP**. **d.** Enter the **First name** of the visitor. **e.** Enter the **Last name** of the visitor. **f.** Specify the **Email Address** of the visitor to send registration details and communications. **g.** Enter the **Phone number** of the visitor. **h.** Enter the **Organization** details of the visitor. **i.** Enter the **Title** of the visitor.

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Field	Description
	j. In the Private notes section, specify any private information. k. In the **Visitor preferences** and **Notification preferences** fields, select the visitor's preferences. l. Add the visitor by selecting **Save and add**.
Add extra services	Select **Add extra services** to select a service from the list to add a workplace service to your current reservation. **Note:** The **Add extra services** option is not available for recurring reservation. When you select multiple buildings while adding a reservation, new services are shown for selected locations. You can add these services as required to your reservation. From the list options, select Space arrangement as an extra service. Select the following options: ○ On the **Add Space Arrangement** dialog box, select a service from the list. For example, select **Chair layout**. ○ Select the Chair layout options: ▪ Classroom style ▪ Banquet rounds ▪ Theater style ○ Select the Number of seats. ○ Add additional comments for the service item. ○ Select **Add**. ○ A new case is created when a reservation or services are updated. A reference is added to the old and new service. ○ Application tries to retain the services when you update a location. When updating a reservation, if the location isn't updated, the services are visible and you can update the reservation after changing the date and time. ○ In case, if space or location is changed while updating a reservation, the application tries to propose available services for a new location. Select the required services and add it to your

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Field	Description
	reservation while updating or modifying a reservation. ○ If you're adding a new space while updating a reservation, you must add the services manually. **Note:** If a workplace service is added to a reservation, a workplace case is created. If you update the reservation date, time, or location and update services by retaining or removing the services, a reference is added to the updated workplace service. The **replacement case for** option is displayed on the new case record form and also a reference is added to the old service. A summary is added to a workplace case record for items that are added, updated, or removed. For more information, see View and track workplace cases.
Edit <services name>	Select **Edit** to update the services. ○ The Update <services name> dialog box is shown. ○ Select **Update** to update the services.
Remove <services name>	Select **Remove** to remove the services from a reservation. A confirmation message is shown to confirm whether you want to remove the services from a reservation.

20. Select **Submit reservation**.
    The Reservation Summary page opens.

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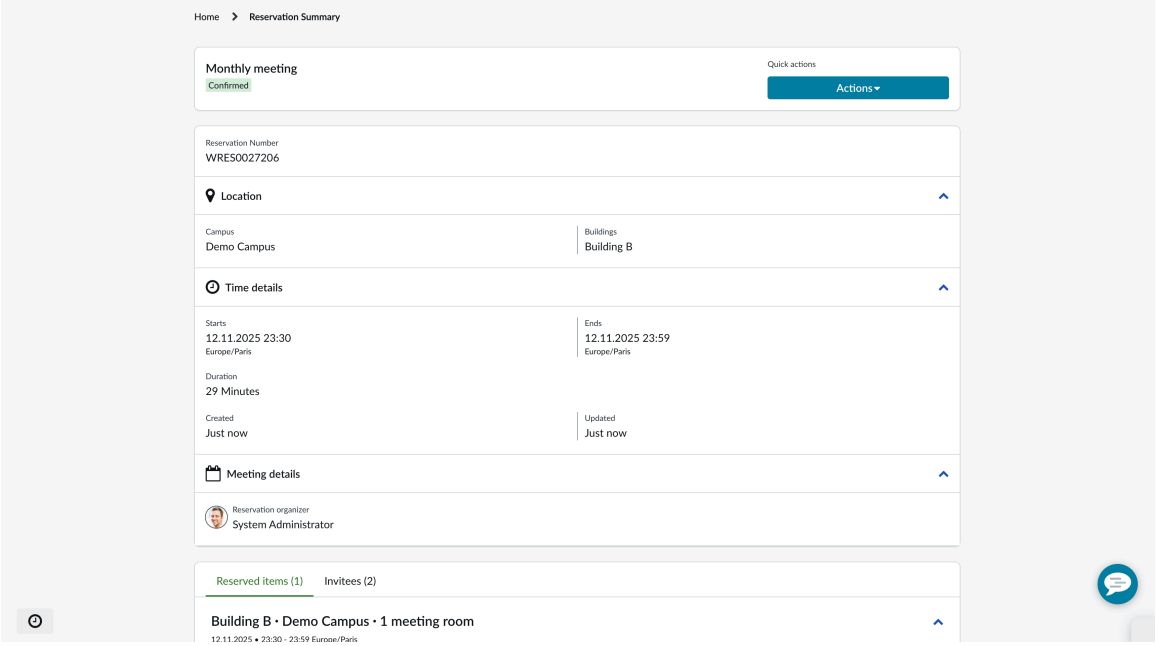

If the workplace item doesn't require any approval, the selected item is reserved. The reservation details are displayed on the Reservation summary page. The state of the request is updated to **Confirmed**. If your request requires approval, it's submitted to a workplace approver. The state of the request is updated to **Awaiting approval**. For more information, see Approve a reservation.

An email notification is sent regarding the reservation confirmation along with the details to the organizer and the user is added to the reservation. If you have invited attendees or any visitors, they receive a notification for the reservation invite. You receive email notifications when reservable synchronization is configured for Workplace Calendar Synchronization. You receive notifications for your reservation on your mobile device when push notification is enabled.

21. Review the reservation summary page.

> **Note:** For multi-day reservation, the reservation summary shows reservation end time duration. For a single day, reservation, only the start date and time are shown.

While reserving or viewing a space, the employee can see if a space is part of a neighborhood.

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a. Select **Check in** to check in a reservation, if the workplace item that you have reserved requires check-in and check out.

> **Note:** You must check in within 30 minutes before the reservation start time. If the reservation isn't checked in within 30 minutes before the reservation start time, your reservation is canceled. An email notification is sent for the canceled reservation. The Check-in option is also available on the My Reservations page.
>
> In case, if you have occupancy sensors installed in your workplace location, your reserved spaces are automatically checked in. You also receive a push notification on the Workplace Service Delivery for Mobile app when your reserved spaces are checked in automatically. If the workplace location or space state is Occupied, the application automatically checks in the reservation. The reservation state moves to In progress state. A push notification is sent to Workplace Service Delivery for Mobile "Your reservation has started. You're automatically checked in based on the presence detected at the space. No further action is required." If the state of the space is Unoccupied or Invalid, the application sends a push notification "Your reservation for Reservation for <space-name> has started. Either Check in to confirm your attendance or Release Booking to Cancel the space reservation". For more information, see Configure automatic check-in for reserved spaces.

b. Select **Check out** to check out a reservation.
Check out within 30 minutes after the reservation end time. If the reservation isn't checked out within 30 minutes after the reservation end time, you receive an email reminder to check out the reservation. The Check out option is also available on the My Reservations page.

c. Select the **Invitees** tab to view, add, or remove any invitees from the Reservation Summary page.
The details of the invitee such as their name, email, assigned location, and invite acceptance states are displayed.

d. If you have selected multiple workplace items and you want to reassign the invitees to a different location, do the following:

- Select the Invitees check box.
- Select **Actions** > **Assign to**.
- In the **New location assignment** field, select the location to be assigned to an invitee.
- Select **Send update**

e. To add or remove an invitee, do the following:

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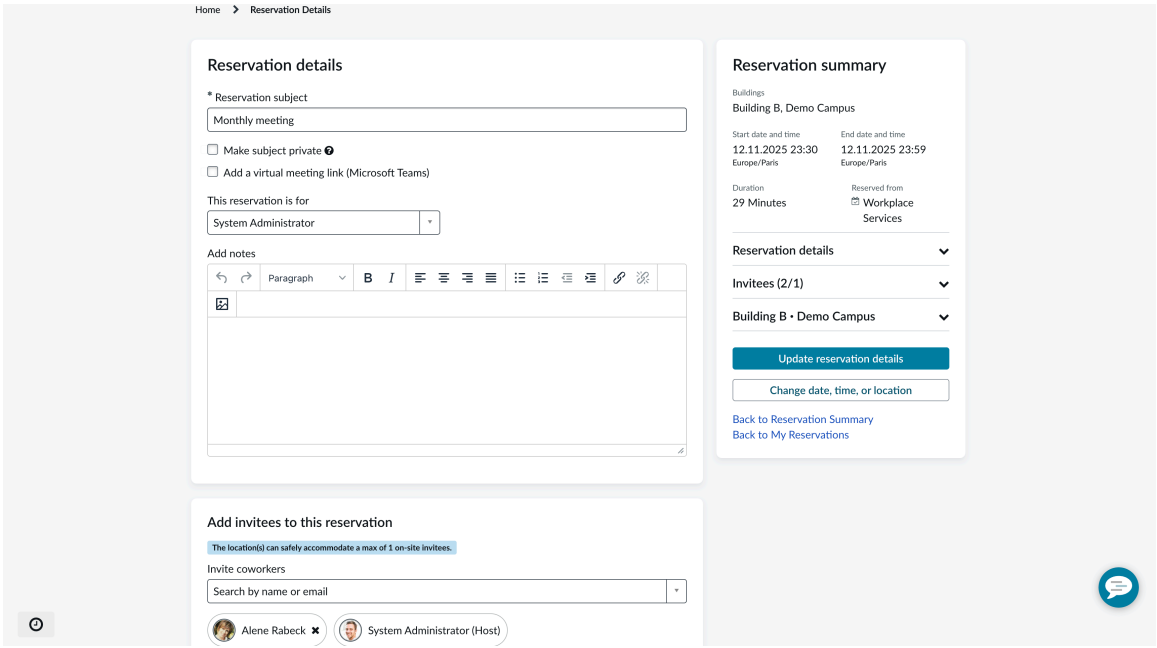
a. On the Reservation summary page, select **Actions** > **Change reservation details**.



b. On the Reservation details page, scroll to view Add Invitees to this reservation section.

c. Add a new invitee or remove an existing invitee by selecting the invitee name from the search option.

d. Select the **Update reservation details** tab.
Invitees and visitors receive email notifications for the following actions:

- When a reservation is created.
- When a reservation is canceled or updated.
- When an invitee or visitor is removed from the reservation, a cancellation mail is sent.

22. If your administrator has configured the **Default reservation path when editing a reservation** value on the Reservable Module, the following reservable paths are shown while editing or updating a reservation:

For more information see, Configure a reservable module

Note: This option isn't available on the Now Mobile app.

Default reservation path when editing a reservation

Based on reservation	You can search locations in the context of a Reservable Path that was used while creating a reservation as shown in Step 2. For example; **Browse all**, **Browse by area**, **Browse by neighborhood**.
Browse all	If you have selected this option on the Reservable module, then while editing a reservation, the context (Reservable Path) is

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	defaulted to **Browse all**. You can change or update the selected space, date, or time of the reservation.

23. After reviewing the workplace services added to a reservation, you can select a new date, time, and location to update the reservation details.
24. On the Reservation Details page, select**Change date, time, or location** to update a reservation.
25. On the Update meeting room reservation page, modify the date, time, and location as required.
26. When you update a reservation, the Reservation details page shows the **Retain extra services** option to retain the services from the previous location and reservation.

    When you update or change a location, a message is shown to indicate that certain services are going to be removed. This happens when workplace services for an updated location are not available. Users are notified if the services are available for a location. The Reservation details page shows services that are available on the new location and also shows the services that aren't available on the new location.

    Workplace Services are automatically retained when the date or time changes for a reservation. But if a location is changed, or if a new location or space is added, you must select to **Retain** your existing workplace services. You can retain, review, or discard the proposed services. When this action is performed, the services are considered **Resolved** for that location. When all location workplace services are resolved, confirm the changes. If location workplace services aren't resolved, a pop-up message is displayed to confirm the action.

    Note: In this case, if the **Allow only single service item selection** option is selected on the Workplace services page, the **Retain Services** option isn't shown on the Reservation details page and the existing services are removed after updating the reservation details for a space (location). You can add new services using the **Add extra services** option as shown in step 11. For more information, see Create a workplace service to provide an extra service for a reservation.

    On the form, fill in the fields.

Retain Services

Field	Description
Retain extra services	URL link to the workplace location to view the list of services that are retained after updating the reservation details. Select the location link to review services to be retained or removed.
Discard	Option to remove services for a location.
Retain	Option to retain services after updating the reservation details. Workplace services are automatically retained when date and time are updated for a reservation. Select **Retain**, when a location is changed or when a new location is added to a reservation. You can retain or remove the proposed workplace services. The workplace services are resolved for a location when you update a reservation.

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Field	Description
	Note: If workplace services are retained, the quantity is reset to 1. Review the retained workplace service. Workplace services such as space configurations and space layouts aren't retained for a reservation.

- Services are canceled if they aren't available or applicable for a location.
- While updating a multi-location reservation, employees are notified after matching the workplace services from previous workplace locations.
- When you change an existing service or services for a reservation, existing workplace case is canceled. A new workplace case is created as a replacement for an existing case and the workplace services are updated.
- A state is added to the changed service. A note is added on the new service case with the changes to the ordered services (added, updated, removed, no changes). For more information, see View and track workplace cases.
- The costs of services are shown based on the case or requested item fields.
- The cost is updated when a workplace service is updated.

  Note: Cost of service items are updated if an employee updates existing service offerings. For example, if you have not changed your extra service item but have changed the time for a reservation record, the cost of the service item is updated based on the latest pricing of the service item. In case, if you remove a space (location) and the service item is also removed from a reservation record, suggested services in the **Retain Services** option show the latest pricing or cost in the reservation record.

Result

- Select **Reservations** > **My Reservations** to view and track your reservation on the Reservation portal home page or on the Reservation summary page.
- **Confirmed**: Reservation State to indicate that the reservation for the selected building is confirmed.

  Note: The **New space** state indicates that a new space is assigned due to a conflicted reservation.

- **Conflicted**: Reservation State on the Reservation summary page. This state shows that the application was not able to resolve the recurring reservation. You must manually find an alternate space, date, and time. Use the **Actions** tab on the Reservation Summary page to select the **Change reservation occurrence**, **Cancel series**, or **Share reservation**.

  An email notification is sent and the reservation is updated with your changes.

  Note: When a conflicting recurring reservation gets auto-resolved with the auto-resolution feature, its status in the **Reservation subtype** column is shown as **Exception** on the Workplace Reservations table.

  For more information, see Auto-resolve recurring reservations.

What to do next

Review your reservation details on the Reservation Summary page.

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While reserving or viewing a space, the employee can see if a space is part of a neighborhood. The neighborhood icon ( ) is displayed on the space card.

- To share the reservation details with others, perform the following actions:
  1. On the Reservation summary page, select **Actions** > **Share reservation**.

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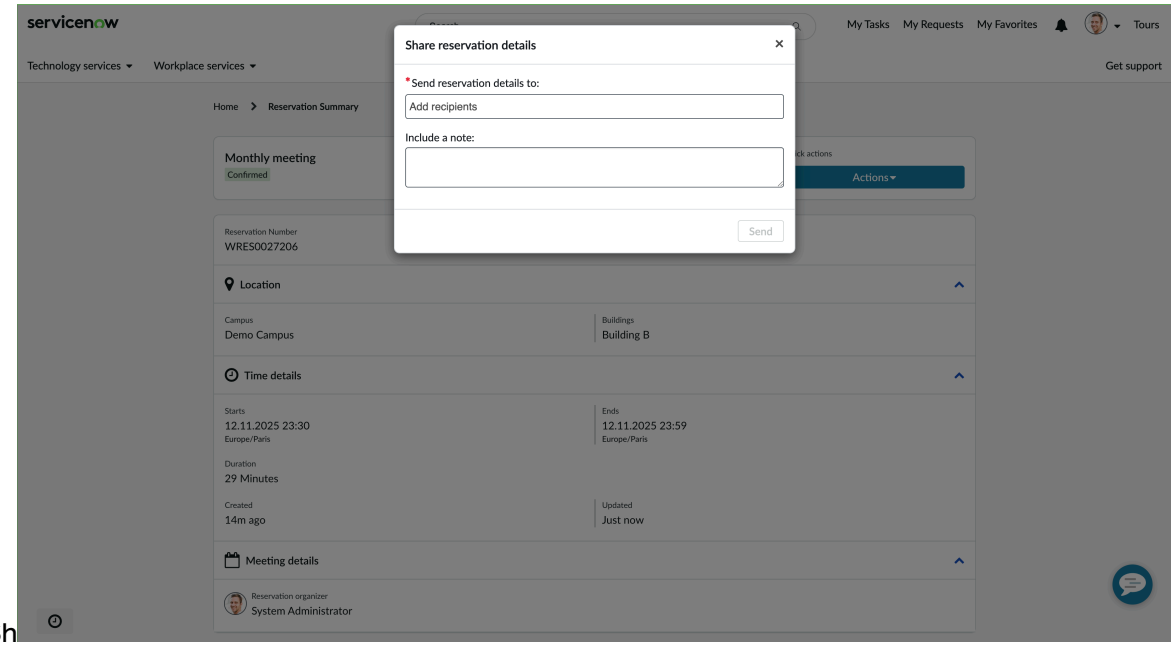

  2. In the **Send reservation details to** field, select the users that you want to share the reservation with.
  3. In the **Include a note**, enter a note if necessary.
  4. Select **Send**
  5. When you share a reservation, invitees receive an email notification.

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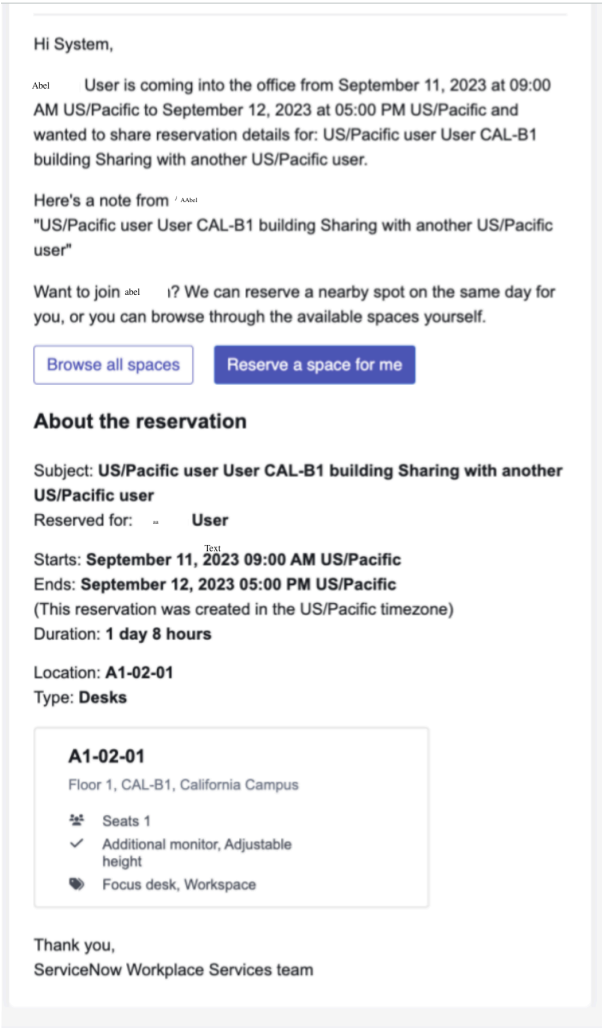

6. You can perform the following from a shared reservation email:
   - Log in as an administrator.
   - Navigate to **All** > **Emails** > **Open shared reservation**.
   - Two navigational links **Browse all spaces** and **Reserve a space for me** are shown:
     - **Browse all spaces**: Select the **Browse all spaces** link to open the reservation portal page.

       If the shared reservation start date (current date) is within the number of days specified in the Max number of days for browse near a person, the **Browse all spaces** clickable link. The clickable links are shown from a shared email notification with pre-filled dates for a selected team member.

       - The **Browse near a person** reservable path is selected by default. If it path isn't available, the **Browse all** path is used.
       - All the fields are pre-filled for a selected team member or a colleague.
       - For multi-day reservation, the first day of a multi-day reservation is prefilled. If the first day is in the past but the current date is still within the reservation time, the current date is selected. In case of multi-day reservation, consider the following:

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- From: The start date of your reservation.
- Time: Select the start time for your reservation from the drop-down list.
- To: End date of your reservation.
- Time: Select the end time for your reservation from the drop-down list.

For more information about multi-day reservation, see Create a multi-day reservation.

Note: If the start day (current date) of a shared reservation is past the value set in the **Max number of days for browse near a person** Reservable module property, the **Browse all spaces** link doesn't show prefilled dates on the Make a reservation page. The application shows a validation error message "**Reservation date for the selected user has changed. Select a date**. You must manually, select the start date and time and end date and time for a reservation.

- **Reserve a space for me**: When you select the **Reserve a space for me** URL link from an email, the space reserved for a colleague or team member is selected by default on the reservation portal. A reservation is created with the same start and end date and time from your previous reservation. If the start date of the reservation falls prior to the current date, the current date is taken as the start date of the reservation. For example, if the start date of your previous reservation is October 15, 2023 and the current date is October 17, 2023, the application uses the current date (October 17, 2023).

  Note: When making a reservation directly by using the **Reserve a space for me** navigational link option, the application ignores the value set in the **Max number of days for browse near a person** Reservable module configuration and creates a reservation.

The reservation details are shared when a reservation is **Confirmed**. If you edit the reservation details after sharing, you're prompted to send an email update to reservation invitees.

- To edit or cancel your reservations, see Share, modify, or cancel a reservation.
- To download an iCalendar, see Download an iCalendar for a reservation.

- If you want to reserve a space using a shared reservation, after you select **Reserve a space for me**, the application automatically reserves one of your favorite locations that has the closest proximity to the space reserved in the shared reservation details.
- Navigate to **All** > **Workplace Reservation Management** > **Reservation Overview** > **All Reservations** to view all workplace reservations.
- Navigate to **All** > **Workplace Reservation Management** > **Reservation Overview** > **My Reservations** to view all reservations made by you.

Add invitees as collaborators and create a reservation

Employee can add their colleagues as collaborators while making a reservation. Employees can view availability of their colleagues on the reservation portal search page while making a reservation to find an available space.

Before you begin

The option to add invitees or colleagues as collaborator is available on the Make a reservation portal page. The option to add guests is available on the Reservation details page once you have selected an available space for reservation.

Workplace Reservation Management should be integrated with Microsoft Exchange Online. The *Find Meeting Times* Spoke and *Lookup Schedules* Spoke action in Microsoft Exchange Online is used to view the availability of invitees. The application retrieves free, busy,

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out of office, and other availability status for selected attendees. Application suggests alternative meeting times and available spaces when there's a conflict or when the selected employees are unavailable.

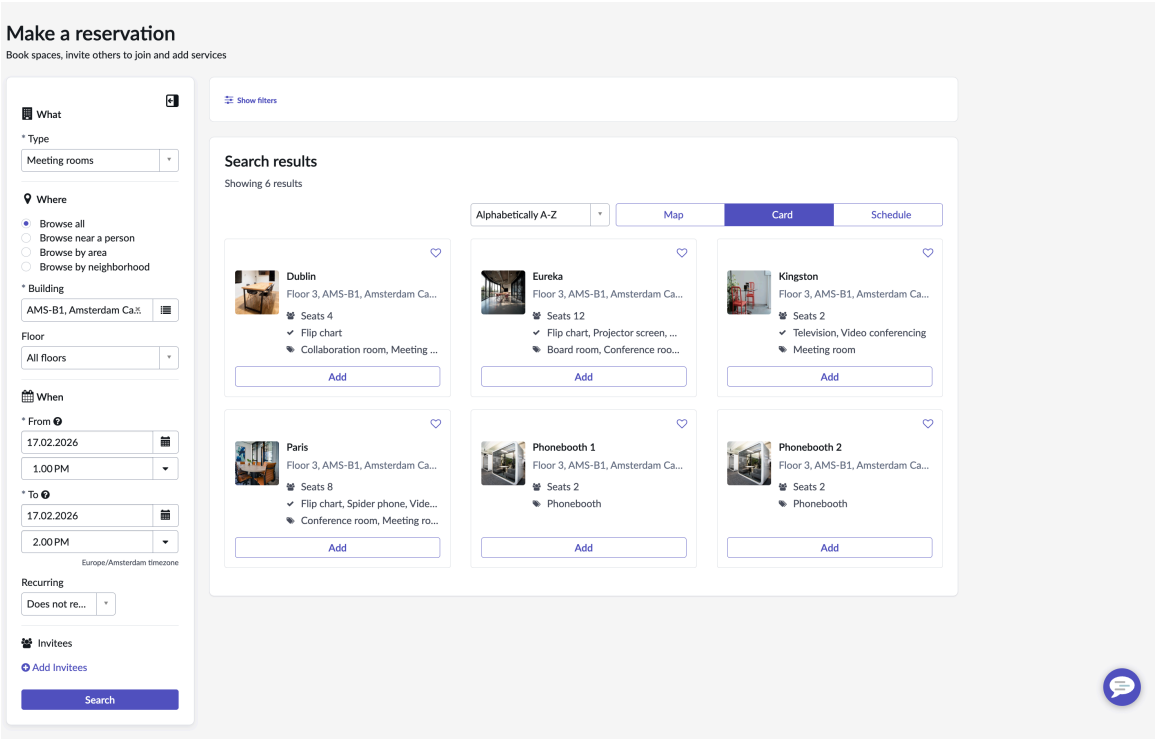
For more information about setting up Microsoft Azure portal configuration, see Set up Microsoft Exchange. To set up the Find Meeting Times and Lookup Schedules spoke actions for Microsoft Exchange Online, see Microsoft Exchange Online Spoke Action.

- Microsoft Exchange Online integration is enabled with Workplace Reservation Management with availability of Spoke action 'Find Meeting Times'.
- Ensure the Reservable Module property *Allow attendees-based search* option is enabled by your administrator. This property is available when you've installed and configured Workplace Calendar Synchronization. For more information, see Configure Workplace Calendar Synchronization
- The sys_user table must be populated with valid user data. Employees can select attendees for their event from the sys_user table.
- Valid user email Id should be configured in Microsoft Exchange Online. When email Id is missing or not configured, the status of an employee is shown as unknown in the add attendee list.
- Workplace Calendar Synchronization should be installed and configured.

Role required: admin

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center** > **Workplace Services** > **Browse Workplace Services** > **New General Reservation**.
2. Reserve a workplace location and add attendees as collaborators.
   On the form, fill in the fields.



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Make a reservation

Type	Select a Reservable Module (Example, Desks, Meeting rooms, and so on) **Note:** Allow attendee-based search is not supported for shift-based Reservable Module configuration. For more information, see Configure a reservable module. Google Calendar and Microsoft On premises are not supported for you to add colleagues as collaborators in a reservation.
Where	Select a reservable path (Example: Browse all, Browse near a person, and so on).
Building	Select a building where you want to make the reservation.
Floor	Select a floor.
When	Select the meeting duration. The meeting duration is shown based on your building time zone. For example, Europe/Amsterdam timezone. The start date and end date is dependent on the on Max days in future value. If Max days in future module configuration value is 6, you cannot reserve a location beyond this duration. /Max number of occurrences. Employees cannot select a date beyond the range specified in these Reservable Module configuration. For more information, see Configure a reservable module.
From	Select the start date and time.
To	Select the end date and time.
Recurring	Select the required recurring event option from the drop-down list. For example, Daily, Weekly, Monthly, Custom and so on. For more information, see Create a reservation. **Note:** Recurring event scheduling is dependent on the *Max number of Occurrences* and *Max days in future* Reservable Module property value. You cannot select recurring occurrences beyond the value specified in the *Max number of Occurrences* Reservable module property value.

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	In case of recurring reservations (Daily, Weekly, Monthly, or Custom), time suggestions for selected attendees are shown only for a single day (24-hour) duration. For Weekly, time suggestion for the first occurrence in a series is shown. For Daily and monthly recurring reservations, time suggestion for the first occurrence is shown.

3. Select **Add invitees**.

   In the The Add invitees and find availability dialog box appears. It shows the host calendar availability at first. If you are making a reservation and adding invitees, you are shown as the host. You can search for attendees that you want to add to your meeting for collaboration. You can search by your colleagues name or email address to find their availability. You can add as many invitees to your meeting as your collaborators. The attendees list is fetched from Microsoft Exchange Online based on the collaborator or invitees calendar events. When you search for attendees, the attendees availability is also shown as Suggestions.

   Note: Application supports adding guests to reservations on the Reservation Details page after you have selected a space for reserving. For guests, application doesn't retrieve the colleagues' availability for them on the reservation portal search page.

   An attendee's availability on the Add Attendees dialog box is shown using Microsoft Exchange Online calendar events color scheme. Out of office calendar event displays purple or white dot against the selected employee name. A new date and time is suggested by the application for a duration when the attendee is available in office. Employees can view suggested reservation options and select any one. If attendees user mail ID is not configured with Microsoft Exchange Online, unknown user (null or no color) is shown against their availability status.

   When creating or viewing an event, the "Show As" setting in Microsoft Exchange Online determines how your time appears to others:

   - Busy (Solid Bar/Color): You are unavailable; others cannot book this time.
   - Tentative (Diagonal Striped Bar): You have a tentative appointment, but might be free.
   - Free (White/Transparent Bar): You are available, even if a calendar item is present.
   - Away (purple or yellow/Specific Indicator): You are away from your desk.
   - Working Elsewhere (Dashed/Different Color): You are working, but not in your usual location.
   - Solid Green Dot: Available.
   - Solid Red Dot: Busy, in a call, or in a meeting.
   - Red Dot with Horizontal Line: Do not disturb.
   - Yellow Dot with Clock: Away or Be right back.
   - White, pink dot or arrow in Purple: Often appears for Out of Office events or shared calendar items.

   Note: These colors and icons may vary slightly between classic Microsoft Outlook, New Microsoft Outlook, and Microsoft Outlook on the web, but "Show As" meanings (Busy/Free/Tentative) remain consistent.

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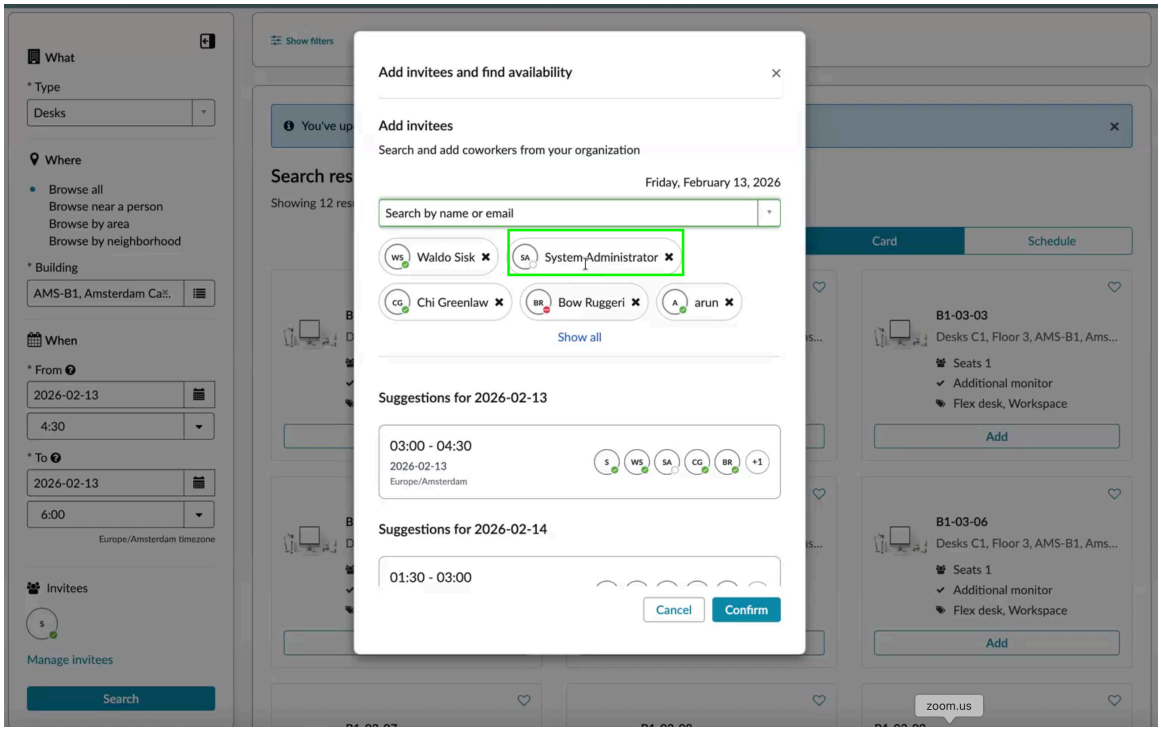
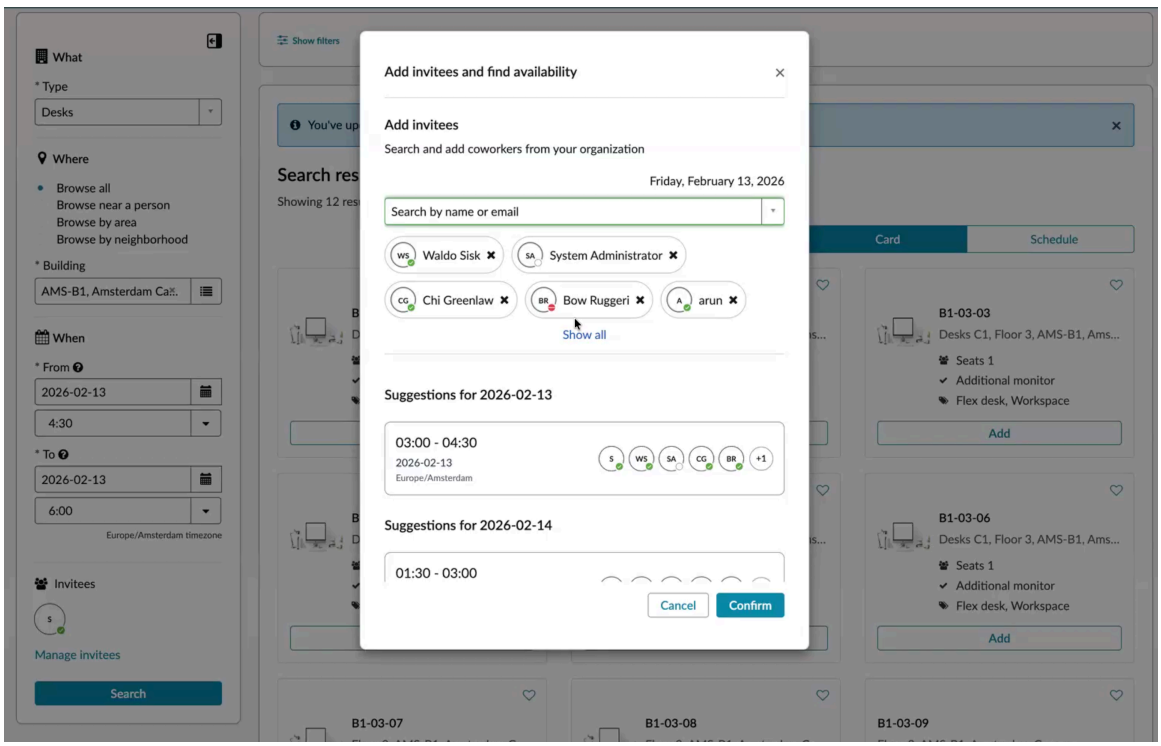


4. In the Add invitees and find availability dialog box, select attendees or collaborators that you want to add to your meeting.



The application adds attendees to your meeting and syncs the attendees calendar event to your calendar.

When the application is unable to fetch attendees availability, it shows a message. “Unable to load availability. Availability cannot be loaded. You can continue with your reservation”.

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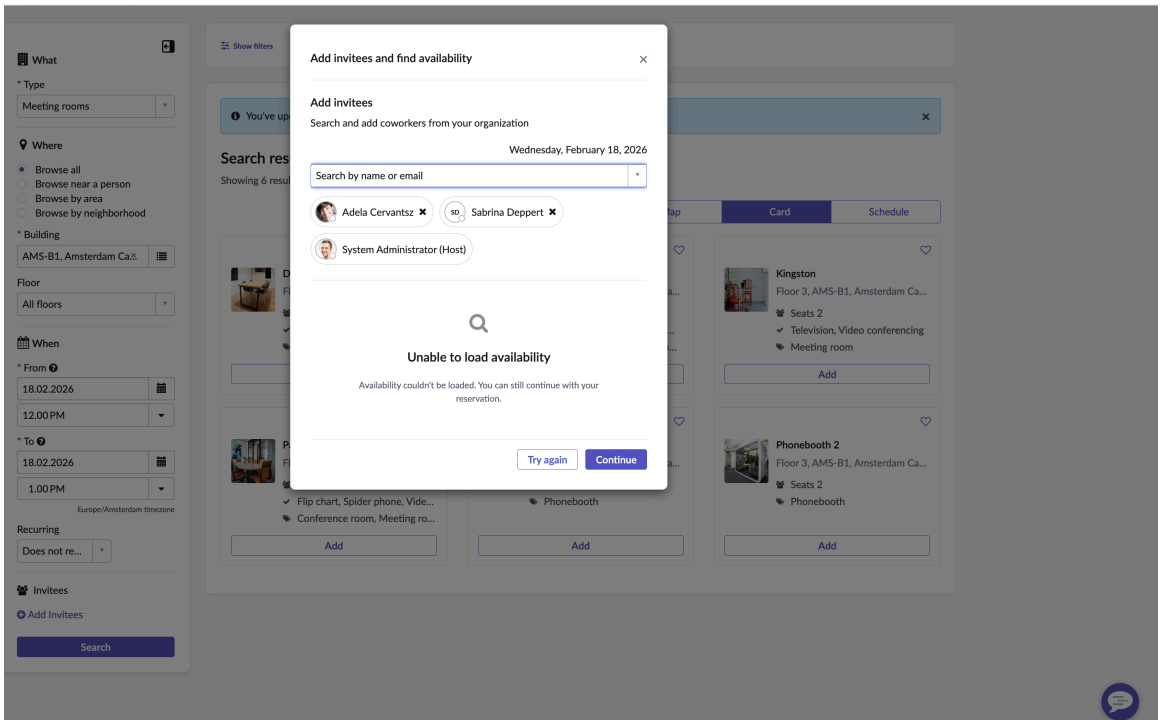

Note: If you change the start and end date, the list is refreshed.

Employees can select event attendees, and the application checks their availability for a selected date and time.

- Employees can view the availability of attendees or an attendee. Application recommends available spaces based on attendee's availability.
- If there are conflicts, application suggests a space with optimal availability. Application suggests alternative meeting options based on selected attendees' availability for a date and time duration.
- Adding guests to reservations is supported but the application doesn't retrieve availability for them on the reservation portal search page.

5. From Suggestions panel, select a date and time of your choice.

   Suggestions are displayed based on your selected start date and end time and the duration of your meeting. For example, if you select 2 hours as the duration of your meeting, suggestions are displayed based on two-hour time duration. For example, if you select your meeting start time as 12 pm, suggestions are displayed from 12 pm onwards.

   If you add multiple attendees or invitees, the users are displayed in horizontal sequence or series. At a time, five attendees names are displayed. If there are more than five attendees, expand the plus option to view additional attendees.

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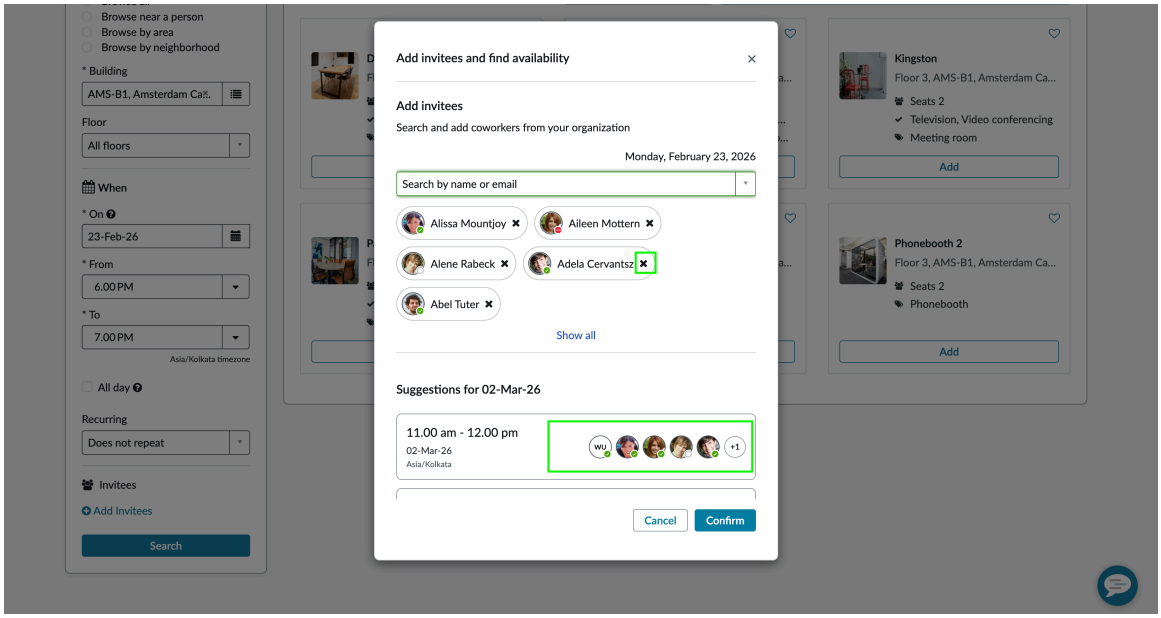
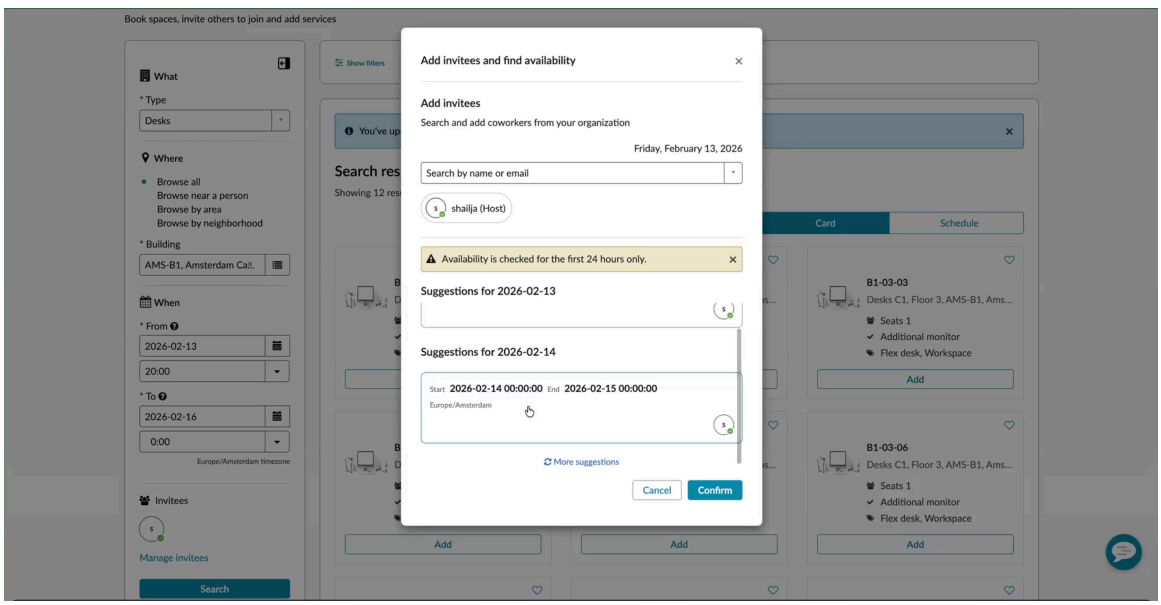


You can remove an attendee by selecting the remove option icon (x).

Note: Availability for selected attendees is shown for 24-hour duration only. If you select a duration beyond this, the application shows "Availability is checked for the first 24-hours only". Suggestions are shown only for 24-hour duration for attendees availability. Microsoft Exchange Online's *`Find Meeting Times`* spoke action doesn't return attendees' availability for more than 24-hours.

For recurring reservations, application shows availability based on the first occurrence, and doesn't calculate the availability based on all occurrences or a sub-set of it. For Weekly, time suggestion for the first occurrence in a series is shown. For Daily and monthly recurring reservations, time suggestion for the first occurrence is shown.



Select **More Suggestions** to load additional suggestions. At a time, the maximum number of suggestions up to 7 days are displayed or shown at a time. This is dependent on the *`Max days in future`* Reservable Module configuration property. If your Max days in future value is 5, you get suggestions for 5 days only.

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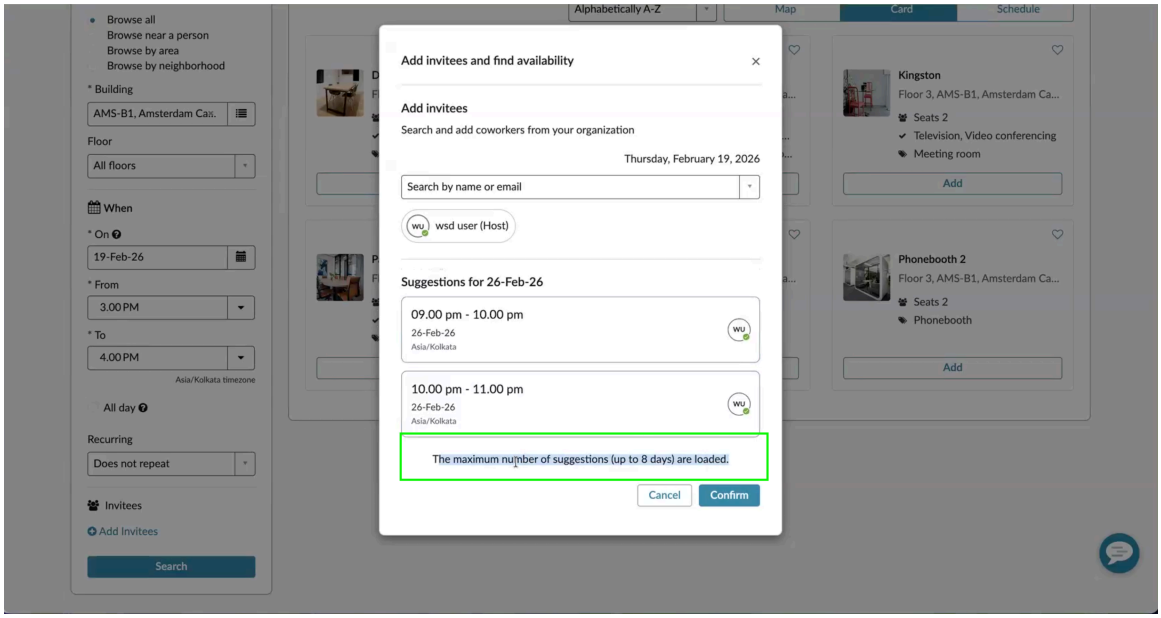

6. Select **Confirm**.

   Upon confirmation, application adds the attendees as invitees before synchronizing the event to the calendar. The **Manage Invitees** option appears on the reservation page after you confirm and add invitees to your meeting.

   If the application is unable to load invitee's availability, it shows **Continue** instead of **Confirm**. Select **Continue** to move forward with your reservation.

   The invitees or attendees are added to your meeting. You can add additional invitees to your meeting using the **Manage Invitees** option. You can also remove invitees as required.

7. Select **Search**.

   Search results page shows available spaces for selected location, date, and time.

8. Select **Add** to add space or spaces to your reservation.
9. Select **Next**.

   The Reservation details page appears. On the Reservation details page, you can add visitors or guests.

10. Complete the required information on the Reservation details page.
    For more information, see Create a reservation.
11. Select Invite Attendees to add external visitors or guests.

    Review the number attendees or invitees added to your reservation.

12. Add or remove workplace services as required.
13. Edit or update your reservation or workplace services as required.

    For more information, see View or update reservations

14. Select **Submit** to create a reservation and add invitees as collaborators to your reservation.
15. Review the Reservation summary page.

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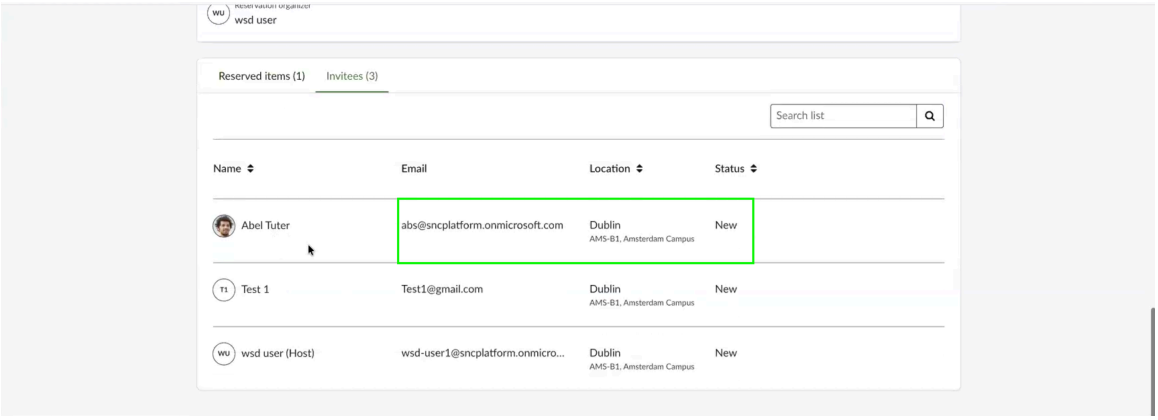

The Reservation summary page displays the invitees or attendees that are added to your reservation. The internal invitees (attendees) column that you've added shows Microsoft Exchange Online user mail IDs. External visitors' column show their personal mail IDs.

Auto-resolve recurring reservations

While making a recurring reservation, only the availability of the first occurrence is checked. It's possible that a future occurrence of the meeting may run into conflicts. To avoid such conflicts, while scheduling a recurring reservation, the Workplace Reservation Management application tries to auto-resolve any recurring conflicts.

Before you begin
Administrators can choose to auto-resolve recurring reservation conflicts at the Reservable module level.

Note: Ensure that you have enabled **Allow recurring reservations** and **Auto-resolve recurring conflicts** options on the Reservable Module form. For more information, see Configure a reservable module.

If you're upgrading from a previous version of Workplace Reservation Management and if you've updated the form layout before, you must edit the form view again to display the **Auto-resolve recurring conflicts** field.

Note: Reservations in a recurring series cannot be updated in bulk. To update a reservation, select a reservation and edit it as required.

The application tries to find an alternative space automatically for conflicted occurrences based on the following logic:

- When floor maps are available, the application tries to find a space closest to the same capacity, then looks for one with more capacity, and lastly, for one with less capacity.
- When no floor map is available, the application finds an alternative space in the same area or on the same floor.
- Favorite spaces are prioritized over 'location' (within the same area or within proximity).
- Application searches for a space of the same type.
- Application searches for a space with similar standard services.
- Employee is notified through the Reservation Summary page and via email when the application assigns an alternative space.

Note: Adding extra services option isn't available for Recurring reservations.

Role required: admin

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Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Reservable Module**.
2. Navigate to **Workplace Core** > **Workplace service portal** > **Workplace Service Portal Home** > **Make a Reservation**.
3. Create a reservation.

   For more information about how to create a reservation, see Create a reservation.

   For example, two workplace users, Abel Tutor and Abel L create reservations. Abel L creates a reservation for Tuesday 11/22 10.00 AM to 12.00 PM in Room A1-02-01.
4. Select **Recurring** to make a recurring reservation.
5. Make the required changes and submit the reservation.
6. Another workplace user (Abel Tutor) makes a recurring reservation.
   Abel Tutor makes the reservation for the week 11/21 to 11/25 from 09:00 to 3 PM for the same space (Room A1-02-01). For more information, see step 3.
7. After submitting the reservation, notice that the user (Abel Tutor) is now assigned a different space for Tuesday since it was already booked by Abel L in Step 3.

   The new space is visible on the reservation summary page. When the conflicting reservation occurrences are resolved, the application tries to assign a new workplace, date, and time within the same module or an alternative space is assigned for the existing date and time. You're also notified via email.

   The **New space** state indicates that a new space is assigned due to a conflicted reservation.

   Note: When a conflicting recurring reservation gets auto-resolved, its status is shown in the Reservation table, and the **Reservation subtype** column is set to **Exception**.
8. If the **Auto-resolve recurring conflicts** property is set to false or not enabled in the Reservable module, and you try to make a reservation (see Step 3), conflicting reservations occur if the same space is booked by another workplace user.
   In such cases, the employee is expected to resolve the reservation conflicts manually by finding an alternative space, date, and time.
9. When viewing the details of a conflicting reservation, the employee can find an alternative space and time using the **Recurrences** option on the Reservation Summary page.

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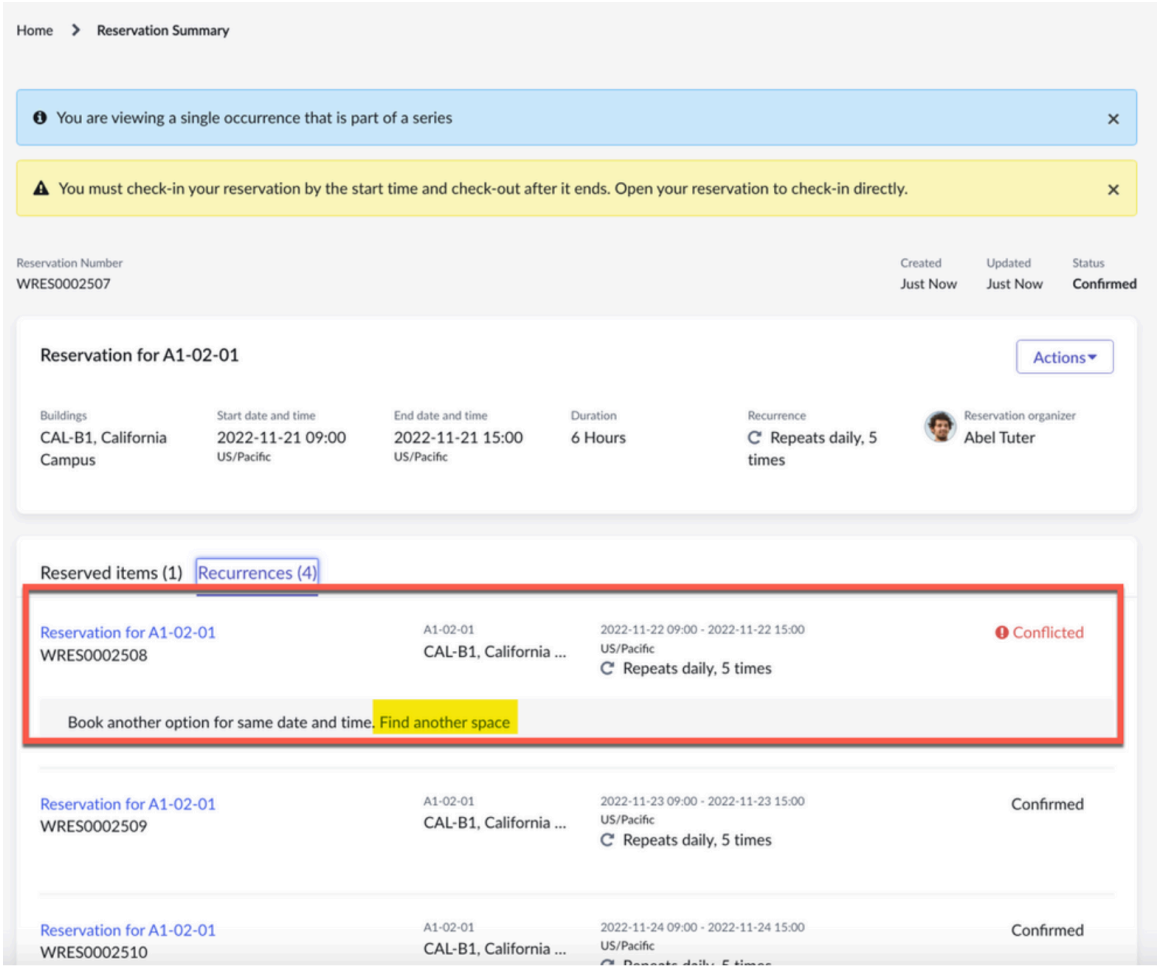

10. Select the required options from the **Actions** drop-down list on the Reservation Summary page:
    - Change reservation occurrence
    - Cancel occurrence
    - Cancel series
    - Share reservation
11. From the email notifications that you receive, select the **View reservation series** option to update space and time for a conflicted reservation.
12. Find an available space or time and create a reservation.
13. Submit the reservation.
    If the **Auto-resolve recurring conflicts** option is enabled, the conflicting recurring reservation in a series is resolved and the user is assigned an available space. When this option isn't enabled, workplace users must manually update the time and space for a given reservation.

Set a location as favorite using the Space details page

Mark your most reserved workplace location as favorite in the Workplace Service Portal. Once the location is set as favorite, it is displayed first whenever you search for locations to make a reservation.

Before you begin

Important: The favorite option appears only if you have access to the Employee Center and if your administrator has enabled the favorite option.

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Role required: sn_wsd_core.workplace_user

About this task

You can set a location as favorite from any one of the following locations in the Workplace Service Portal:

- **Quick Reservation widget**
- **Make a reservation**

After you set a workplace location as your favorite, you can directly reserve that location from the My favorites page on the Employee Center.

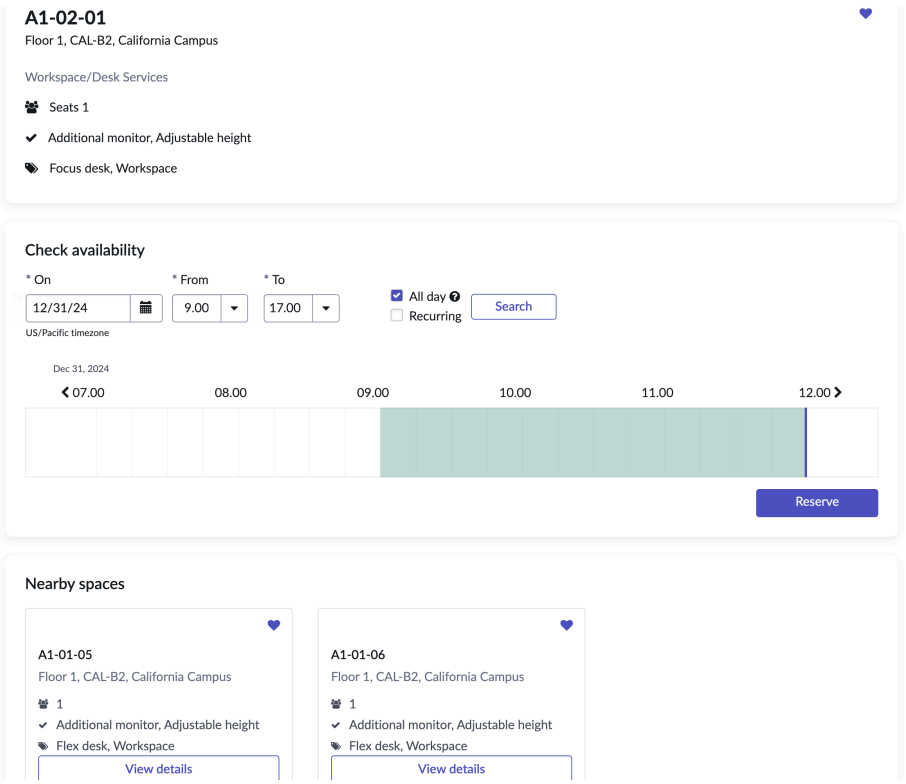
Note: For more information about the derivation logic used by Workplace Reservation Management on the Space details page to assign reservable modules, see Reservable module derivation logic for Space details.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the top right menu, select the favorite icon ( ).

   My favorites page is displayed.
3. Select a space to view the space details page.

   For example: **Desk A1.0501**.
4. On the **Check Availability** section, select the start date, time, and end date.



If the **Max days for multi-day** Reservable Module property value is set and is greater than 1, employees can reserve a space for multiple days. Default value of **Max days for multi-day** property is 1. For example, if **Max days for multi-day** value is set to 10 days from the

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current date, then, only the next available 10 days are available for you to select and make a reservation. Other dates are disabled and are not available for selection.

5. Select **Search**.
6. In the **Card view**, **Schedule view** or **Map view** In the Card view, Schedule view or Map view, Mark a location as favorite by clicking the favorite icon (♡)
7. The **Schedule view** in case of multi-day reservation displays available spaces in a day view.
   - Clicking the chevron will take you to the next day and previous day.
   - Three-hour blocks are used to show the time scale in a 24-hour format.
   - In case of a single day reservation, one-hour blocks are used to show the time scale for a day.
8. The calendar shows the available time lines when the reservable modules can be reserved.
9. Map view shows the selected workplace spaces on a map, if maps are enabled by your organization.
   If employees have a permanent assignment in their workplace profile, the employee names are displayed on the map for a selected space. For more information, see Display permanent seat assignments on floor maps.
10. Select **Reserve**.
11. Review the Reservation details page.

    For more information about Reservation details page, see Create a reservation
12. Submit your Reservation.
13. Sort the workplace items to display your favorite locations using the **My favorites first** sort option.

    a. By default, if you have favorite locations, the default sort option is set to **My favorites first**.

    The workplace items are then sorted and all your favorite locations are displayed first in an alphabetical order followed by the other workplace items that match the search criteria.

    b. If you are browsing for a workplace location near a person, you can sort the workplace items to display your favorite locations first using the **My favorites first** sort option.

    The favorite locations are displayed based on the closest proximity with the person's location.
14. To remove a location from the favorites list, deselect the favorite icon in the location details.
15. On the Reservation Portal, you can view and perform the following actions after you set a location as favorite:

    a. After your perform the search operation, you can sort the workplace items to display your favorite locations at first using the **My favorites first** sort option. By default, if you have favorite locations, the default sort option is set to **My favorites first**.

    The workplace items are then sorted and all your favorite locations are displayed first in an alphabetical order followed by the other workplace items that match the search criteria.

    b. If you are browsing for a workplace location near a person, you can sort the workplace items to display your favorite locations first using the **My favorites first** sort option.

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The favorite locations are displayed based on the closest proximity with the person's location.

c. If you are creating a recurring reservation, you can see the recurring availability within the series of the space on the space details page.

16. To remove a location from the favorites list, deselect the favorite icon in the location details.
17. On the Reservation Portal, you can view and perform the following actions after you set a location as favorite:

    a. After your perform the search operation, you can sort the workplace items to display your favorite locations at first using the My favorites first sort option.

    By default, if you have favorite locations, the default sort option is set to **My favorites first**. The workplace items are then sorted and all your favorite locations are displayed first in an alphabetical order followed by the other workplace items that match the search criteria.

    b. If you are browsing for a workplace location near a person, you can sort the workplace items to display your favorite locations first using the My favorites first sort option.

    The favorite locations are displayed based on the closest proximity with the person's location.

18. In the Workplace Service Portal Quick Reservation widget, after you specify the search criteria, the most suitable location is displayed based on your favorite location.

    - If there is any favorite location that best matches the search criteria, the Quick Reservation widget displays that location as the best match.
    - You can also set a best match workplace location as favorite directly from the Quick Reservation widget.

19. If you want to reserve a space using a shared reservation, after you click **Reserve a space for me**, the application automatically reserves one of your favorite locations that has closest proximity with the space reserved in the shared reservation details.

Result

The location is added to your favorites list.

Reserve a space near your colleague

Make a workplace reservation and reserve a space near your team member or a colleague.

Before you begin

Role required: admin

Procedure

1. Select any of the following context menu navigation options to make a workplace reservation and reserve a space near your preferred colleague or a team member.

Location	Steps
Application navigation filter	Navigate to **All** > **Workplace Reservation Management** > **Portal** > **New Reservation**.

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Location	Steps
From Employee Center Portal	○ Navigate to **All** > **Self-Service** > **Employee Center**. ○ On the Employee Center portal, select **Workplace Services** > **Browse Workplace Services**. ○ Select the **New general reservation** card. Make a reservation portal page opens for you to make workplace reservations. ○ Another way to make reservation is to use chat icon. On the home page, select the chat icon (). To make a reservation, en ter your question or select **Show Me Every thing** to select from the list of available op tions.

The Make a Reservation page opens in a new tab.

2. Select a Reservable Module configuration.

   For example, select any of the following Reservable Module configuraiton. For more information, see Configure a reservable module.

   - Desks
   - Desks with an Area
   - Meeting rooms require approval
   - Meeting rooms
   - Desks with a shift

3. Select **Browse near a person** to search for available spaces near a colleague or team member.

   Note: This option appears only if the **Enable browse near a person** Reservable Module property is enabled. For more information, see Configure a reservable module.

   The **Max number of days for browse near a person** Reservable Module property can be configured to reserve a space near a colleague for a maximum number of days. The default value of this property is 7. The **Browse near a person** is displayed only when the **Enable browse near a person** option is selected on the Reservable Module. The system counts **Max number of days for browse near a person** from the current date (day 1). Here, seven days includes current date (day 1) and the next six available calendar days.

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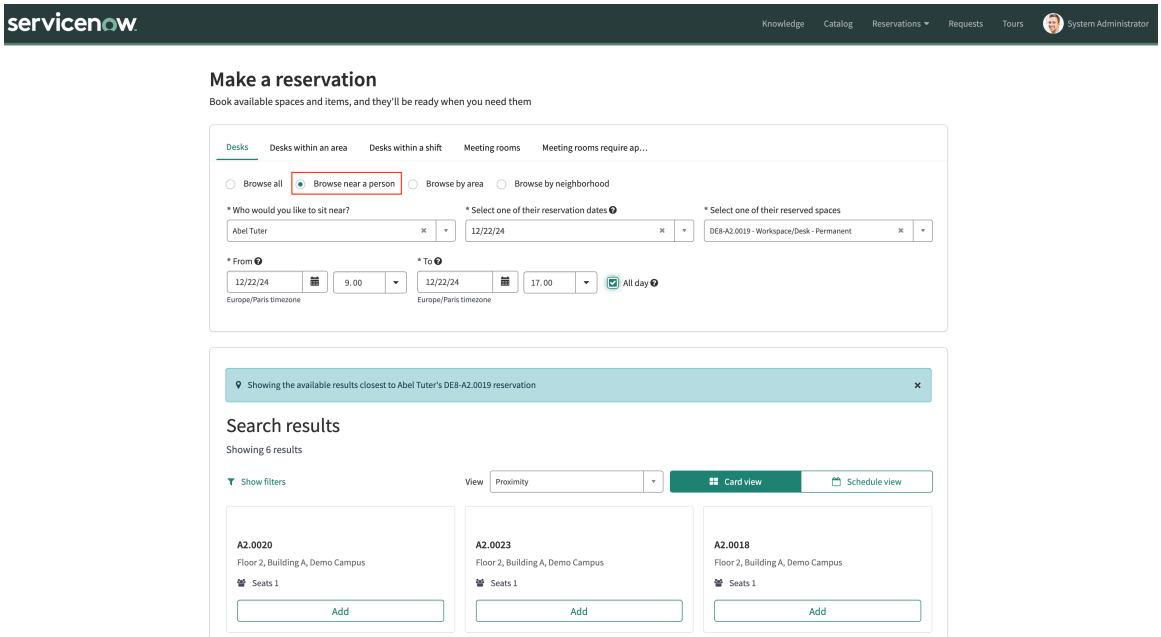
Note: When browsing near a person, if there are any private spaces, the private spaces aren’t displayed in the reservation search result.

If a cost center or department is enabled for a user profile's location, only those spaces or desks that have the same cost center or department as profile locations are displayed. Only spaces or desks that are assigned as flexible or none are displayed. The search results doesn't display permanent spaces or desks.

All required fields must be filled in on the form when you’re creating a reservation and when the auto-search option is enabled by your administrator. The auto-search option doesn't work if the required field inputs are missing on the reservation page.



a. Who would you like to sit near?: Select the user or colleague that you want to reserve a space nearby.

b. Specify the following details to search for the most suitable space near a colleague or team member.

Note: You can’t create a Recurring reservation if you're making a reservation near a team member or colleague.

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- **Select one of their reservation dates**: Reservation dates to make a reservation.

  Note: In case, if your colleague has a workplace profile, all dates (date range) specified in the **Max number of days for browse near a person** are displayed. In case, if there's no workplace profile, only the available reservation dates, if applicable, are shown for a colleague or team member. After selecting the dates, you can reserve available spaces. Spaces with privacy enabled (Private) spaces aren't available for selection.

  The dates are visible, based on the following considerations:

  - Maximum days specified in the **Max number of days for browse near a person** Reservable Module property. For more information, see Configure a reservable module.
  - Start date and End date: If a multi-day reservation is enabled, you can select a date in the range of a colleague's multi day reservation when making a reservation.

    For example, if **Max days for multi-day** is 10 and you try to make a reservation for 15 days, the application shows a validation error. You're only allowed to make a reservation for the next 10 days from the current date.

    For more information, see Create a multi-day reservation

- **Select one of their reserved spaces**: Option to show dedicated spaces and reserved spaces that aren't marked as private for a colleague or team member with a workplace profile. In case, if the selected user or colleague doesn't have a workplace profile, only the available reserved spaces (if applicable) are displayed.

  Note: If a colleague has a permanently assigned space and has also had a reservation for the same day or has multiple reservations, you can select either of these spaces to make a reservation near their colleague.

- **From**: Reservation start date. The time is displayed based on the selected building's time zone.
- **To**: Reservation end date. The time is displayed based on the selected building's time zone.
- **All day**: Select this option to reserve the workplace item for an entire day. The start date and time of the reservation depends on the date and time set by your organization. This option appears if your Workplace administrator has enabled the **All day** reservation setting for a selected workplace location.

- For a multi-day reservation, the **From** and **To** fields show the date range specified for a multi-day reservation.

4. Select **Search** to select available spaces from the Card View, Map View, or Scheduled view.

   Note: You can't sort workplace items in alphabetical order or by your favorite locations if you're browsing spaces near a person. The spaces near a person are searched based on proximity.

5. Select Add to add a space.
6. Select **Next** to proceed with reserving the selected space.
7. Review the Reservation details.

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8. Add workplace services as required.
9. Select **Submit Reservation**.

Create a multi-day reservation

Workplace users can now reserve a space covering multiple days. Employees can reserve a space that spans across multiple days.

Before you begin

Multi-day reservations can be made when **Max days for multi-day** Reservable Module property value is set in the Reservable module configuration. Default value of this property is set to 1. If the value for **Max days for multi-day** property is set to 1, then it will be considered a single day reservation and multi-day reservation will not be allowed. If the **Max days for multi-day** value is more than 1, the **All day** or single day reservation option is disabled on the reservation portal.

For more information, see Configure a reservable module.

This property is dependent on the **Max days in future** value. If the value of **Max days for multi-day** is more than **Max days in future** Reservable Module property, application will show a validation error and will not create a multi-day reservation.

Role required: sn_wsd_core.workplace_user

Procedure

1. Select any of the following context menu navigation options to make a multi-day.

Location	Steps
Application navigation filter	Navigate to **All** > **Workplace Reservation Management** > **Portal** > **New Reservation**.
From Employee Center Portal	○ Navigate to **All** > **Self-Service** > **Employee Center**. ○ On the Employee Center portal, select **Workplace Services** > **Browse Workplace Services**. ○ Select the **New general reservation** card. Make a reservation portal page opens for you to make workplace reservations. ○ Another way to make reservation is to use chat icon. On the home page, select the chat icon ( ). To make a reservation, en ter your question or select **Show Me Every thing** to select from the list of available op tions.

The Make a Reservation page opens in a new tab.

2. Select a Reservable Module configuration.

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For example, select any of the following Reservable Module configuraiton. For more information, see Configure a reservable module.

- Desks
- Desks with an Area
- Meeting rooms require approval
- Meeting rooms
- Desks with a shift

3. On the Make a reservation page, select any of the Reservable paths:

   The following reservation paths available for a selected Reservable Module.

   - Browse all
   - Browse near a person
   - Browse by area
   - Browse by neighborhood
   - Browse all spaces

4. **Optional:** Select **Browse all**.
   The **Browse all** reservable path is selected by default.

   a. Search for a workplace item that you want to reserve using the following available criteria.

5. Complete the following information.

   Fill in the form fields.

Make a reservation form

Field Name	Description
Building	Name of the building for a selected campus. Select a building from the list. For example, Demo Campus. The building names and location names are alphabetically sorted or sorted according to the **Order** that you have configured on the Buildings and Regions tables. When a sort **Order** is configured for a building or region, the building names and locations are sorted accordingly. If the sorting **Order** value isn't specified for an item, the items are listed on top of the list (ascending order), and sorted alphabetically. The building names and location names are alphabetically sorted based on the label name. For example Building A, Building B, and so on.
Floor	Floor of a building where you want to make a reservation. The floor names are either alphabetically sorted or the values are sorted based on the indicated sort order. You can configure

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Field Name	Description
	the sort **Order** in the Floors table. If the sorting **Order** value is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The Floor names are alphabetically sorted based on the names and labels.
From **Note:** The time directive fields (From, time, To) are also available on the MESP (Mobile Employee Service Portal) on the Now Mobile app.	Start date of your reservation. ○ Employees can't select a date and create a reservation if the start date exceeds the Max days in future Reservable module value. Thisn't value is configured on the Reservable module by your administrator. For more information, see Configure a reservable module. When the Max days in future value is configured by your administrator, you can't select a date past the max allowed date. The dates in the calendar date picker are inactive for dates that are too far in future. **Note:** If the Max days in future value isn't configured, the date selection isn't restricted. Date selection is based on the Max number of occurrences value. For more information, see Configure a reservable module. ○ If you enter an invalid date which is greater than what is specified in the **Max days in future** value, the application resets the date to the current date.
Time	Start time when the reservation begins. Employees can select time using the drop-down list or by entering the time in the field. The time increment value depends on the value set by your administrator. Default reservation time duration available for selection is 30 minutes. The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Service Portal Widget instances. The start time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes.

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Field Name	Description
	Note: You can't select a date that occurs in the past. The time for a selected location depends on the building time zone.
To	End date of your reservation. Select a number of days or dates on the calendar to make a multi-day reservation. Employees can't select a date and create a reservation when the End date exceeds the Max days in future value. The Max days in future value specifies the maximum number of the days in the future up to which the Reservable module can be reserved. **Note:** In the case of a single day reservation, option to enter the end date isn't available. If you enter an invalid date which is greater than what is specified in the **Max days in future** value, the application resets the date to the current date. **Note:** If the **Max days in future** value isn't enabled, then the date selection isn't restricted and is based on the **Max number of occurrences** value configured in the Reservable module. For more information, see Configure a reservable module.
Time	End time when you would stop using the workplace item. Employees can select the end time using the drop-down list or by entering the time in the field. The end time increment value depends on the value set by your administrator. Default reservation end time duration is 30 minutes. The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Service Portal Widget instances. The start time and end time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes.

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Field Name	Description
	Note: You can't select a date that occurs in the past. For example, If the start time is 09:00, you can select an end time after this duration. You can't select a time before 09:00 on the same day. The time for a selected location depends on the building time zone.
Recurring	Option to reserve the workplace items on a recurring basis. Specify the number of days and the number of times that you want to repeat the reservation in a recurring series. For weekly reservations, select the days of the week for the reservation. The Recurring option is displayed based on the configuration that your admin has set. Also, if there are any recurring reservation conflicts, they're auto-resolved if your admin has configured the same. Auto-resolve recurring conflicts</uicontrol> option is enabled on the Reservable module form. The application tries to auto-resolve recurring reservation conflicts. For more information, see Auto-resolve recurring reservations. **Note:** Adding extra services option isn't available for Recurring reservations.
All day	Option to reserve the workplace item for an entire day or a single day. This option appears if your Workplace administrator has enabled the All day reservation setting on the selected **Type**. The start and end times of the reservation depend on the timings set by your organization. The **All day** option is also available on the Space details page. **Note:** The **All day** option's appearance depends on your administrator's configuration. If your admin has mandated all day reservation for a selected **Type**, the reservation is automatically made for the entire day. In case of All day you can only modify the Start date of the reservation.
Add another building	Reserve multiple workplace items spanning multiple buildings. The buildings time zones are different for a same date and time in a reservation.

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Field Name	Description
	Note: This option is available if you have selected **Allow multiple reservations** check box on the **Reservable Module** > **Reservable Module Configuration** tab. For more information, see Create multi-building reservations.

6. Select **Add another building**.
   Reserve multiple workplace items across multiple locations and buildings belonging to the same neighborhood.

   The buildings can belong to different time zones for the same date and time in a single reservation.

   Note: This option is available if you've selected **Allow multiple reservations** check box on the Reservable Module Configuration.

   For more information, see Create multi-building reservations.

7. Click **Search**.
   The workplace items that match the search criteria and which are available for reservations are displayed. By default when you click **Search**, the first building card is shown as selected and the available spaces in that building are shown.

   Note: While browsing near a person, if there are any private spaces, then they are not displayed in the search result.

8. The card view shows all the available spaces.

   Note: You can switch between the **Card view** tab and the **Schedule view** tab to review the reservation timelines and the availability of workplace items.

   (Optional) To mark a location as favorite, click the **Card view** or **Schedule view** click the favorite icon (Favorite icon.)

9. Click **Map view**, select a space and then select **Add** to add the space.

   The map view shows available and booked spaces.

   - If your organization is using floor maps, view the floor maps using Mappedin or Indoor Mapping as your map provider.

     .

     - Select a Campus on the Map view.
     - Select a Floor from the drop-down list.
     - Zoom in to select a building and location

       The building names are alphabetically sorted or sorted as per the **Order** that you have configured in the Buildings table.

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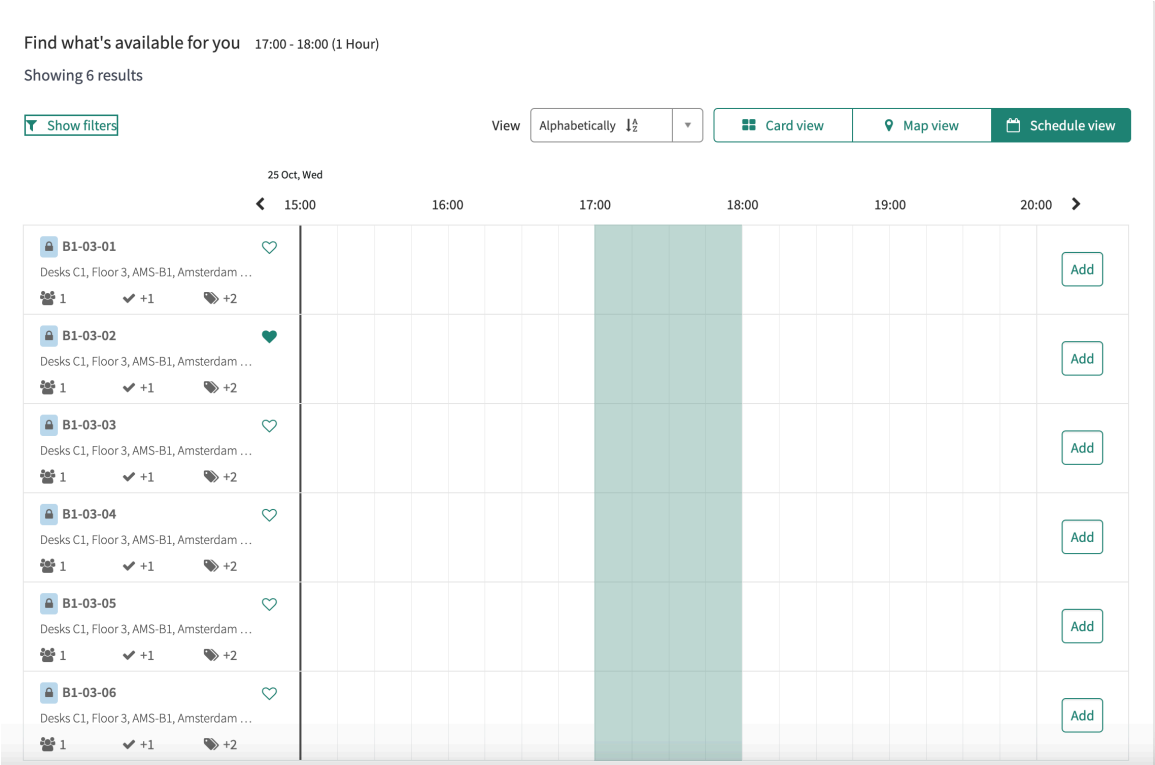
10. For a multi day reservation search, the **Schedule view** shows available spaces in a day view.

    The schedule view shows available as well as unavailable spaces.



    - Clicking the chevron will take you to the next day and previous day.
    - In case of a single day reservation, one-hour blocks are used to show the time scale for a day.

11. Click **Add**.
12. Select a Space or Spaces.
13. Select **Next**.
14. On the form, fill in the fields.

Reservation details from

Field	Description
Reservation subject	Subject of your meeting.
Make all space details private	Option to make all the selected spaces as private. **Note:** The option is displayed based on the location privacy setup of the selected space(s). If you have selected multiple spaces, you can also specify your privacy preference for each space individually, using the **Mark space details private** below each space on the form.

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Field	Description
Make space details private	Option to set the space details of the space as private. **Note:** The option is displayed based on the privacy setup of the space.
Make subject private	Option to mark the subject of the reservation as private.
Reserve these items together for the same person	Option to reserve all the workplaces for the same user. This option appears if you've selected multiple workplace items for reservation.
Add a virtual meeting link	Option to generate a virtual meeting link so that remote employees can join the reservation. **Note:** (Only applicable for Microsoft Teams) As of the May Store 2023 release, when adding a meeting link, the application will retrieve the meeting details while synchronizing the event with a calendar provider.
This reservation is for	If you're requesting a reservation on behalf of someone else, select the name of that person. Leave this field empty if you're requesting a reservation for yourself.
Number of attendees	Number of people expected to attend the meeting.
Add notes	Option to add the meeting note to a reservation using the rich text editor. The notes can be shared with the meeting invitees. Users can also copy and paste text to the editor. The message can contain a maximum of 65,000 characters. Note is saved on the reservation record. Employees can update the note when required. The invitees receive a notification when note is added or updated. The reservation summary page shows the summary of the meeting note. This option is available only if you have selected the **Allow reservation message** option on the Reservation widget configuration. For more information, see Configure a reservable module.

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Field	Description
Add invitees to this reservation section	**Note:** This section appears only if your administrator has enabled the configuration to invite attendees to this workplace location. This option will not appear if the **Number of attendees** option is displayed for the workplace location.
Invite coworkers	Employees whom you want to invite to the reservation.
Invite external visitor	Option to invite external visitor. **Note:** This option appears only if you have the Workplace Visitor Management application installed. The visitor details are automatically logged in the Workplace Visitor Management application for the reception staff to perform visitor-related tasks. ○ If you've already registered the visitor, do the following: **a.** Select **Previous visitor**. **b.** In the **Select a prior visitor** field, select the visitor. You can also preview the visitor details and modify any details if required. The details are updated automatically in all the visitor-related records and registration records. ○ If you're registering the visitor for the first time, do the following: **a.** Select **Add new visitor**. **b.** Select the **Visitor type**. **c.** If the guest is a special guest, enable **VIP**. **d.** Enter the **First name** of the visitor. **e.** Enter the **Last name** of the visitor. **f.** Specify the **Email Address** of the visitor to send registration details and communications. **g.** Enter the **Phone number** of the visitor. **h.** Enter the **Organization** details of the visitor. **i.** Enter the **Title** of the visitor.

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Field	Description
	j. In the Private notes section, specify any private information. k. In the **Visitor preferences** and **Notification preferences** fields, select the visitor's preferences. l. Add the visitor by clicking **Save and add**.
Add extra services	Click the **Add extra services**drop-down list to select a service that you want to add to your current reservation. **Note:** The **Add extra services** option is not available for recurring reservation. When the employees select multi-building locations, new services are shown for the selected spaces so that they can add the services. For example: In case if you have selected space arrangements as an extra service, then select the following items: ○ On the **Add Space Arrangement** dialog box, select a service from the drop-down list. For example, select **Chair layout**. ○ Select the Chair layout options: ▪ Classroom style ▪ Banquet rounds ▪ Theater style ○ Select the Number of seats. ○ Add additional comments for the service item. ○ Click **Add**. ○ A new case is created when a reservation or services are updated. A reference is added to the old and new service. ○ Application tries to retain the services. In case while updating a reservation, the space or location is not changed, then the services are visible and employees can update the reservation after changing the date and time. ○ In case, if space or location is changed while updating a reservation, then the application tries to propose the available services and applicable for a new location. Employees must select the suggested

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Field	Description
	services and add it to their reservation while updating it. ○ In case if you are adding a space while updating a reservation, then you must add the services manually. **Note:** In case, if you add a service item, a new case is created. If you update the reservation date, time, or location and update services by retaining or discarding them, then a reference is added to the new service (replacement case for) on the new case record and also a reference is added to the old service. A summary is added to the new case for items that are added, updated, or removed. For more information, see View and track workplace cases.
Edit <services name>	Click **Edit** to update the services. ○ The Update <services name> dialog box is shown. ○ Click **Update** to update the services.
Remove <services name>	Click **Remove** to remove the services from a reservation. A confirmation message is shown to confirm whether you want to remove the services from a reservation.

15. After verifying the services, employees can select a new date, time, and space to update the reservation details.

    On the **Reservation Details** page, select **Change date, time, or location** to update a reservation.

    On the Update meeting room reservation page, modify the **Start date and time** and **End date and time**. For more information about how to modify a reservation, see Share, modify, or cancel a reservation. If the item doesn't require any approval, the selected workplace item is reserved. The reservation details are displayed on the Reservation summary page. The state of the request is updated to **Confirmed**.

16. When you update a reservation, the Reservation details page shows the **Retain extra services** option to retain the services from the previous location and reservation.
    For more information about how to retain services, see Create a reservation.
17. Click **Submit reservation**.
18. Click **Reservation Summary** to navigate to the Reservation Summary page.

    In case of multi-day reservation, the Reservation Summary page will show the reservation end duration.

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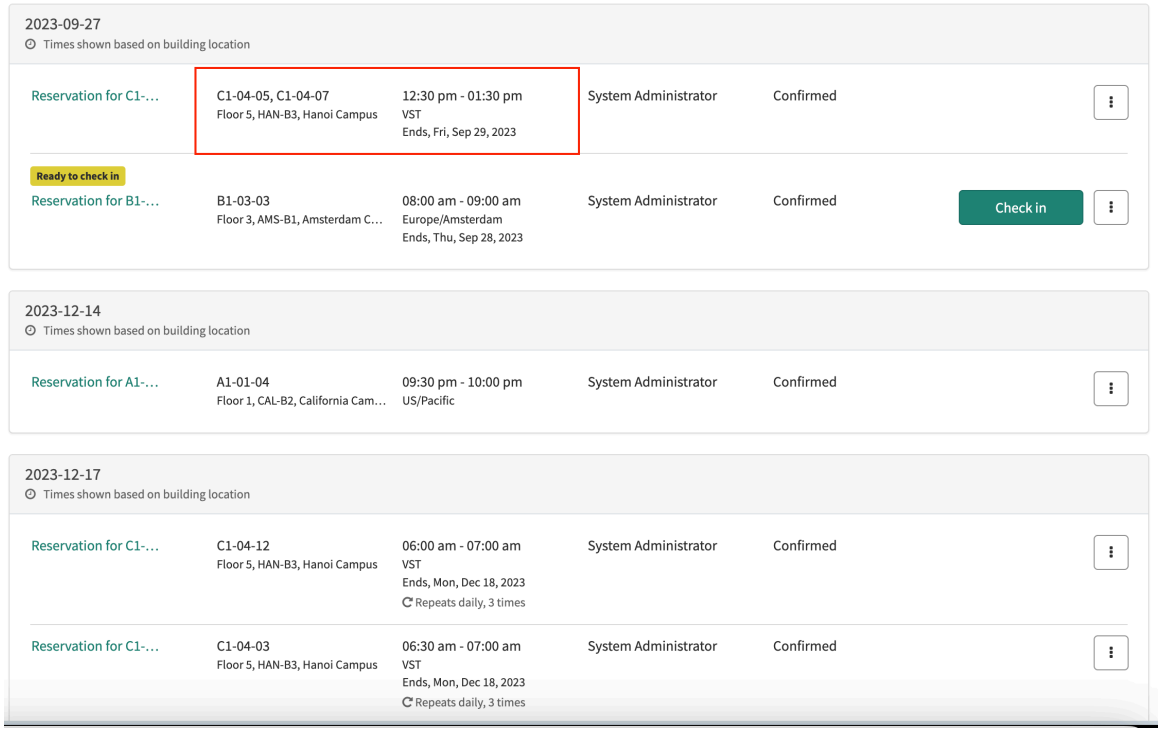
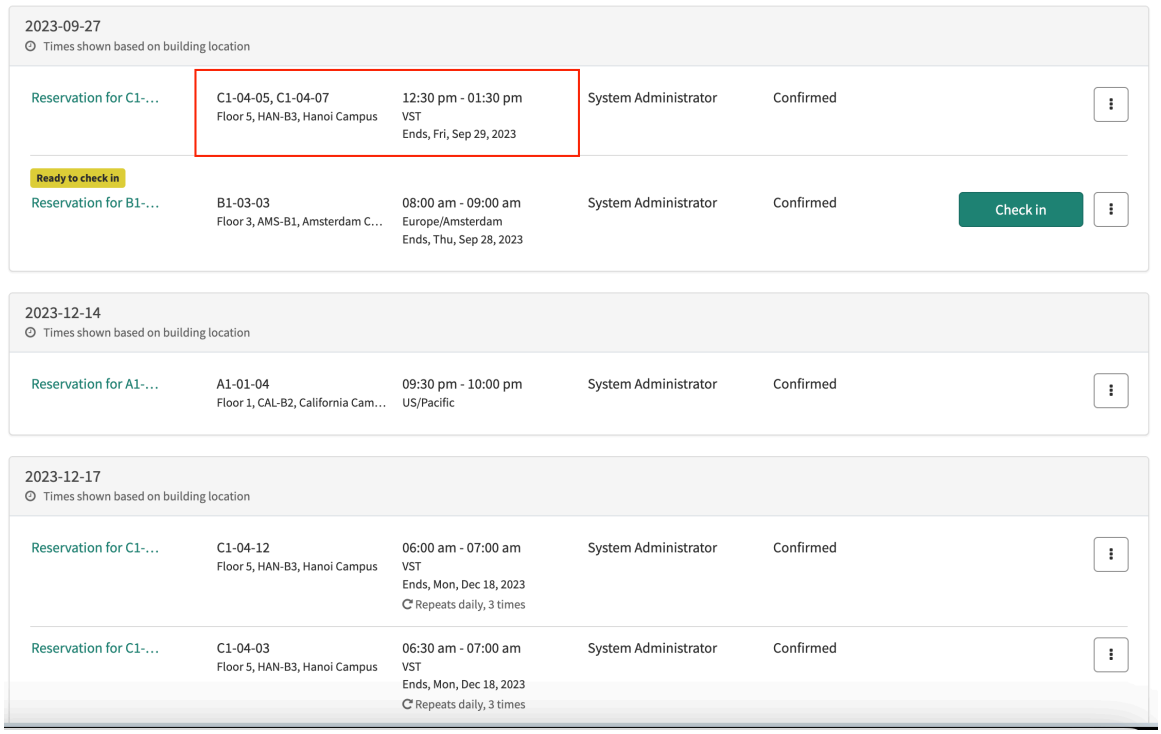


19. Click **My Reservation** to navigate to the My Reservations page.
20. View and track the progress of your reservation status using the My Reservations page.



- **Confirmed**: State to indicate that the reservation for the selected building is confirmed.

> **Note:** The **New space** state indicates that a new space is assigned due to a conflicted reservation.

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- **Conflicted**: State to indicate that the application was not able to resolve the recurring reservation. Employees must manually find an alternate space, date, and time. Use the **Actions** field on the Reservation Summary page to **Change reservation occurrence**, **Cancel occurrence**. **Cancel series**, or **Share reservation**.

  Note: When a conflicting recurring reservation gets auto-resolved with the auto-resolution feature, it's status in **Reservation subtype** column is shown as **Exception** on the Workplace Reservations table.

  For more information, see Auto-resolve recurring reservations.

21. The Reservation Summary page shows reserved spaces and it's status along with the duration for the reservation in case of multi-day reservation.

    Employees are informed in the case if they are viewing a multi-day reservation.

22. The **Actions** tab on the Reservation Summary page shows the following options:
    - Share Reservation: Perform the following steps to share a reservation:
      a. Select **Actions** > **Share reservation**.
      b. In the **Send reservation details to** field, select the users that you want to share the reservation with.
      c. In the **Include a note**, enter a note if required.
      d. Click **Send**.

      The reservation details are shared after the state of the reservation is **Confirmed**. If you edit the reservation details after sharing, the application will prompt you asking whether you want to send an email update to the users that you shared the reservation details with earlier.
    - Update Reservation details
    - Cancel Reservation: To edit or cancel your reservations, see Share, modify, or cancel a reservation.
23. Click **Check in** to check in a reservation, if the workplace item that you've reserved requires check-in and check-out.

    In the case an employee checks in their reservation, the complete reservation is checked in. The admin can indicate if a check in is allowed when there is still an active reservation happening on that space.

    Note: You must check in within 30 minutes before the reservation start time. If the reservation is not checked in within 30 minutes before the reservation start time, then the reservation is canceled. You will receive an email about the cancellation. The Check in option is also available on the My Reservations page.

24. Click **Check out** to check out a reservation.

    In the case an employee checks out their reservation, the end date and time is updated and the space is made available again.

    Check out within 30 minutes after the reservation end time. If the reservation is not checked out within 30 minutes after the reservation end time, you receive an email reminder to check out the reservation. The Check out option is also available on the My Reservations page.

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25. An email notification is sent with the details of your reservation and the reservation is updated with your changes.

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In case of multi-day, reservation, the email notification contains the multi-day reservation details along with the number of days and hours a space is reserved for. For more information, about sharing a reservation, see Create a reservation.

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servicenow

Your reservation has been updated

Your reservation has been updated for: Reservation Confirmation Mail Multi Multi-day with services edited

Invitees will receive an email with the updated reservation details.

See you soon.

View reservation details

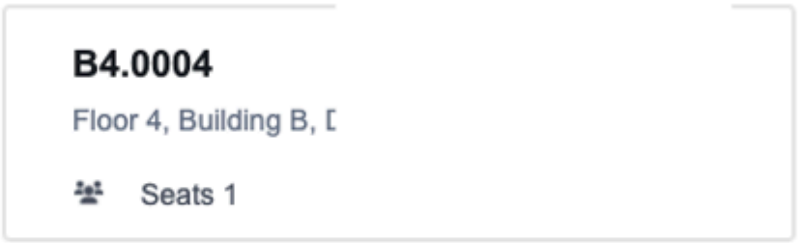
About the reservation

Subject: **Reservation Confirmation Mail Multi Multi-day with services edited**
Reserved for: **User**

Starts: **August 09, 2023 09:30 AM Europe/Paris**
Ends: **August 14, 2023 06:30 PM Europe/Paris**
(This reservation was created in the UTC timezone)
Duration: **5 days 9 hours**

Locations (3): **64A-B1.0003** (Building B, Demo Campus), **820-B4.0005** (Building B, Demo Campus), **823-B4.0004** (Building B, Demo Campus)

Location: **823-B4.0004**
Type: **Desks**



Additional services:
Catering: Drinks - Champagne

Location: 820-B4.0005
Type: Desks

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Result

What to do next

Review your reservation details on the Reservation summary page.

1. On the Reservation summary page, select **Actions** > **Share reservation**.
2. In the **Send reservation details to** field, select the users that you want to share the reservation with.
3. In the **Include a note**, enter a note if required.
4. Click **Send**
5. When you share a reservation, invitees will receive an email notification.

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Hi System,

Abel User is coming into the office from September 11, 2023 at 09:00 AM US/Pacific to September 12, 2023 at 05:00 PM US/Pacific and wanted to share reservation details for: US/Pacific user User CAL-B1 building Sharing with another US/Pacific user.

Here's a note from AAbel
"US/Pacific user User CAL-B1 building Sharing with another US/Pacific user"

Want to join abel ı? We can reserve a nearby spot on the same day for you, or you can browse through the available spaces yourself.

Browse all spaces | Reserve a space for me

About the reservation

Subject: **US/Pacific user User CAL-B1 building Sharing with another US/Pacific user**
Reserved for: aa **User**

Text

Starts: **September 11, 2023 09:00 AM US/Pacific**
Ends: **September 12, 2023 05:00 PM US/Pacific**
(This reservation was created in the US/Pacific timezone)
Duration: **1 day 8 hours**

Location: **A1-02-01**
Type: **Desks**

A1-02-01
Floor 1, CAL-B1, California Campus

Seats 1
Additional monitor, Adjustable height
Focus desk, Workspace

Thank you,
ServiceNow Workplace Services team

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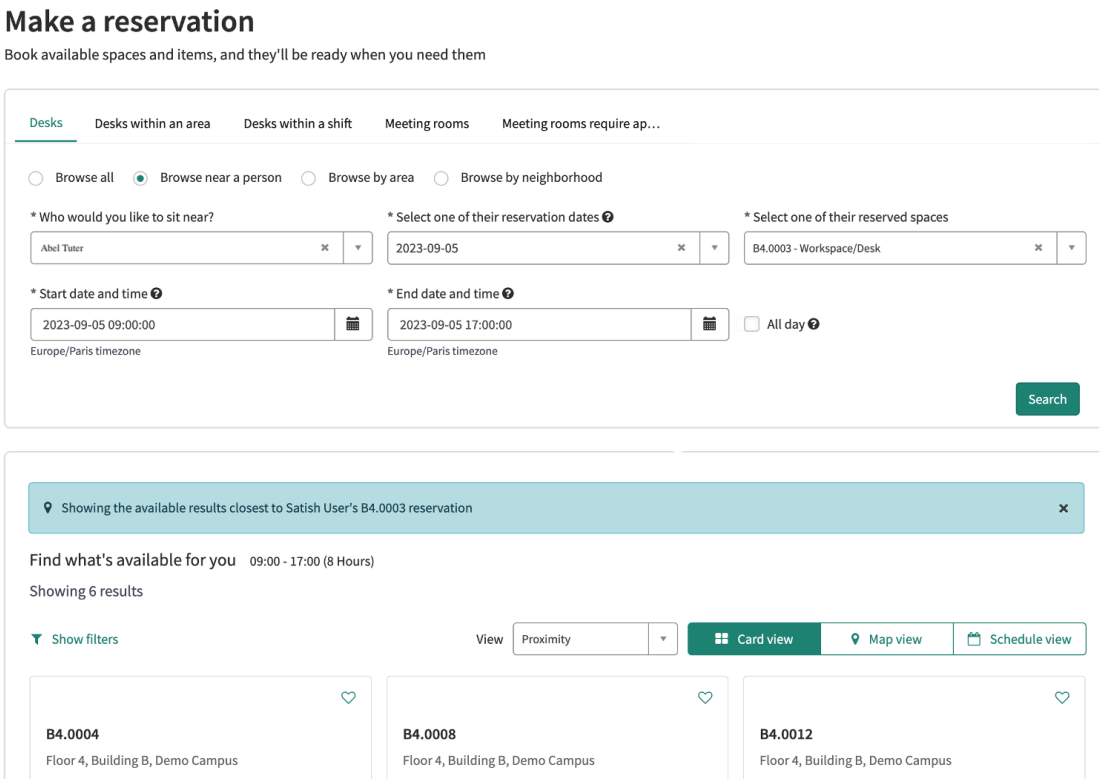
You can perform the following from a shared reservation email:

- Login as System Administrator.
- Navigate to **All** > **Emails** > **Open shared reservation**.
- Two clickable links **Browse all spaces** and **Reserve a space for me** are shown:
  - **Browse all spaces**: Click the **Browse all spaces** link to open the Reservation portal search page.

    If the shared reservation start date (current date) is within the number of days specified in the **Max number of days for browse near a person** Reservable Module property, then the **Browse all spaces** clickable link from a shared email notification will show pre-filled dates for a selected team member or colleague on the reservation portal search page.



- On the Reservation portal search page, the **Browse near a person** is selected by default.

  If this path is not available, then, the **Browse all** path is used.

- All the fields are pre-filled for a selected team member or colleague.

- In case of multi-day reservation, the first day of a multi-day reservation is pre-filled. If the first day is in the past but the current date is still within the reservation time, the current date is selected. In case of multi-day reservation, consider the following:
  - Start date and time: The first day of the multi-day reservation is shown. Start time is the start time of the reservation.
  - End date and time: The End date and time of the reservation is pre-filled.

  For more information about multi-day reservation, see Create a multi-day reservation.

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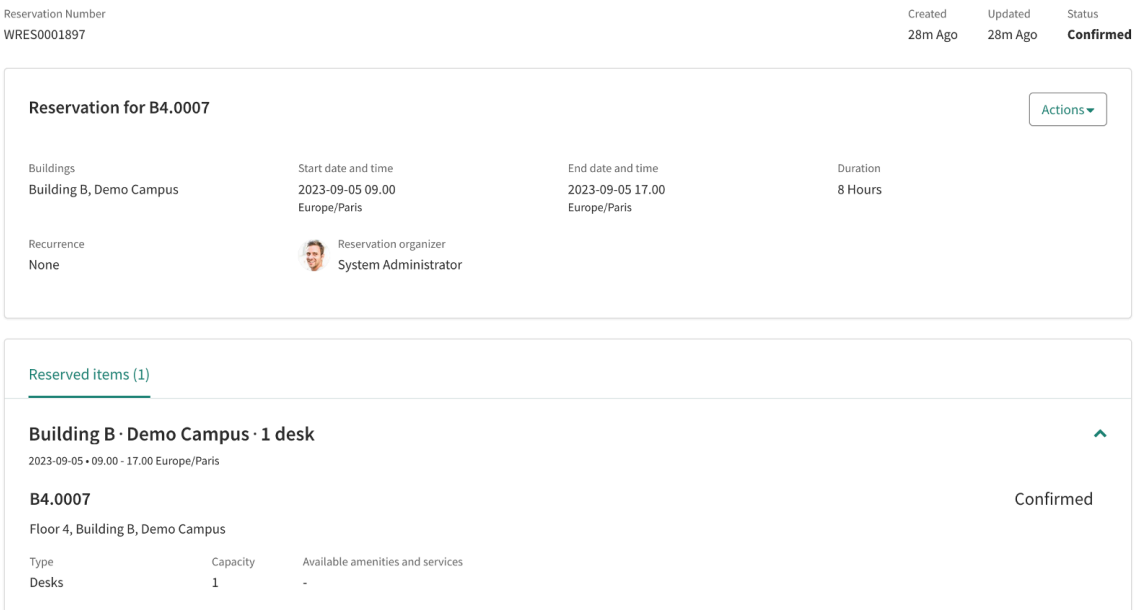
Note: If the start day (current date) of a shared reservation is past the value set in the **Max number of days for browse near a person** Reservable module property, the **Browse all spaces** clickable link will not show pre-filled dates on the Make a reservation search page. Application shows a validation error message "**Reservation date for the selected user has changed. Select a date**'. In this case, employees must manually, select the **Start date and time** and **End date and time**.

- **Reserve a space for me**: When an employee clicks open the **Reserve a space for me** link from an email, the space reserved for a colleague or team member is selected by default. The system will create a reservation with the same start and end date and time. If the start date of the reservation falls prior to the current date, then the current date will be taken as the start date of the reservation. For example, if the start date is October 15, 2023 and the current date is October 17, 2023, the system will use the current date (October 17, 2023).

  Note: When making a reservation directly by using the **Reserve a space for me** clickable link option, application ignores the value set in the **Max number of days for browse near a person** Reservable module property and creates a reservation.



- **1.** On the Reservation summary page, select **Actions** > **Share reservation**.
  2. In the **Send reservation details to** field, select the users that you want to share the reservation with.
  3. In the **Include a note**, enter a note if required.
  4. Click **Send**
  5. When you share a reservation, invitees will receive an email notification.

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Browse all spaces | Reserve a space for me

About the reservation

Subject: **US/Pacific user User CAL-B1 building Sharing with another US/Pacific user**
Reserved for: aa **User**

Text

Starts: **September 11, 2023 09:00 AM US/Pacific**
Ends: **September 12, 2023 05:00 PM US/Pacific**
(This reservation was created in the US/Pacific timezone)
Duration: **1 day 8 hours**

Location: **A1-02-01**
Type: **Desks**

A1-02-01

Floor 1, CAL-B1, California Campus

Seats 1
Additional monitor, Adjustable height
Focus desk, Workspace

Thank you,
ServiceNow Workplace Services team

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   - Login as System Administrator.
   - Navigate to **All** > **Emails** > **Open shared reservation**.
   - Two clickable links **Browse all spaces** and **Reserve a space for me** are shown:
     - **Browse all spaces**: Click the **Browse all spaces** link to open the Reservation portal search page.

       If the shared reservation start date (current date) is within the number of days specified in the **Max number of days for browse near a person** Reservable Module property, then the **Browse all spaces** clickable link from a shared email notification will show pre-filled dates for a selected team member or colleague on the reservation portal search page.

       - On the Reservation portal search page, the **Browse near a person** is selected by default.

         If this path is not available, then, the **Browse all** path is used.

       - All the fields are pre-filled for a selected team member or colleague.

       - In case of multi-day reservation, the first day of a multi-day reservation is pre-filled. If the first day is in the past but the current date is still within the reservation time, the current date is selected. In case of multi-day reservation, consider the following:
         - Start date and time: The first day of the multi-day reservation is shown. Start time is the start time of the reservation.
         - End date and time: The End date and time of the reservation is pre-filled.

         For more information about multi-day reservation, see Create a multi-day reservation.

       Note: If the start day (current date) of a shared reservation is past the value set in the **Max number of days for browse near a person** Reservable module property, the **Browse all spaces** clickable link will not show pre-filled dates on the Make a reservation search page. Application shows a validation error message "**Reservation date for the selected user has changed. Select a date**'. In this case, employees must manually, select the **Start date and time** and **End date and time**.

     - **Reserve a space for me**: When an employee clicks open the **Reserve a space for me** link from an email, the space reserved for a colleague or team member is selected by default. The system will create a reservation with the same start and end date and time. If the start date of the reservation falls prior to the current date, then the current date will be taken as the start date of the reservation. For example, if the start date is October 15, 2023 and the current date is October 17, 2023, the system will use the current date (October 17, 2023).

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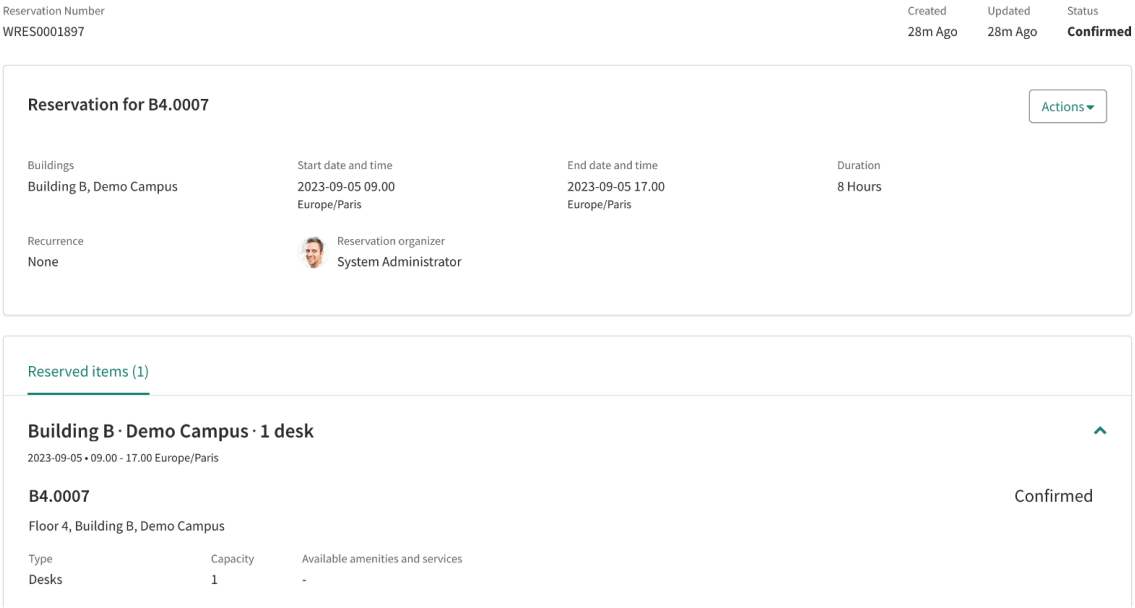
Note: When making a reservation directly by using the **Reserve a space for me** clickable link option, application ignores the value set in the **Max number of days for browse near a person** Reservable module property and creates a reservation.



The reservation details are shared after the state of the reservation is **Confirmed**. If you edit the reservation details after sharing, the application will prompt you asking whether you want to send an email update to the users that you shared the reservation details with earlier.

- To edit or cancel your reservations, see Share, modify, or cancel a reservation.
- To download an iCalendar, see Download an iCalendar for a reservation.
- To view, add, or remove any invitees from the reservation, do the following:

1. On the Reservation summary page, select the **Invitees** tab.

   The details of the invitee their name, email, assigned location, and invite acceptance states are displayed.

2. If you've selected multiple workplace items and you want to reassign the invitees to a different location, do the following:
   a. Select the check box next to the invitee.
   b. Select **Actions** > **Assign to**.

      You can also select the Actions icon (⋮) next to the invitee details.

   c. In the **New location assignment** field, select the location where you want to move the invitee.
   d. Click **Send update**.
3. Add or remove an invitee.
   a. On the Reservation summary page, select **Actions** > **Change reservation details**.
   b. On the Reservation details page, go to the **Add invitees to this reservation** section.
   c. Add an invitee by selecting the invitee name from the search list.

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d. Remove an invitee by clicking the remove icon (✖) near the invitee name.

e. Click **Update reservation details** tab.

Invitees and visitors receive email notifications for the following actions:

- When a reservation is created, they will receive an email notification that they are invited to the reservation.
- When a reservation is cancelled or updated.
- When an invitee or visitor is removed from the reservation, they will receive an email notification that the invite has been canceled for them.

Note: If push notifications are enabled in your organization and you have the Workplace Service Delivery for Mobile application, you will receive notifications for your reservation on your mobile device. For more information on reservation-related push notifications, see Mobile push notifications for workplace reservations.

For more information about making multi-day reservation using the Space Details page, see Set a location as favorite using the Space details page.

Create multi-building reservations

Reserve multiple spaces spanning across multiple buildings in different timezone. Create multi-building reservations for the same date and time in a single reservation.

Before you begin

Role required: sn_wsd_core.workplace_user

About this task

Reserve multiple spaces belonging to different buildings in a single reservation using the **Add another building** option on the Make a reservation page. For example, if you want to have a meeting where your colleagues are joining from different locations, you can create a single reservation with multiple locations from different time zones. Some of your colleagues may join from California while others may join from Amsterdam, and so on. Workplace Reservation Management automatically takes care of the timezone conversion based on the buildings selected and their associated timezones.

The **Allow multiple building reservations** option should be configured by your administrator to make a multi-building reservation. For more information, see Configure a reservable module.

Procedure

1. Navigate to **Workplace Reservation Management** > **Portal** > **New Reservation**.
   Select the type of spaces that you want to reserve. The types are displayed as tabs, such as Desks, Meeting rooms, or Parking. For more information, see Create a reservation.

   You cannot make a multi-building reservation when using shifts.

2. Provide the name of the primary or first building and the floor of the building where you want to make a reservation along with date and time.

   You must select a space for the primary building when making a multi-building reservation using the web portal.

3. Select the **Add another building** option to add multiple buildings and spaces within a single reservation and provide the required details like Building name, floor, start date and time.

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The selected buildings can belong to different regions or locations and different time zones. The application automatically adjusts the time zones variations accordingly.

The first building that you select is considered the primary building and the other buildings that you add after the first building are the secondary buildings. The application uses the date and time from the primary building to convert the applicable time zones for the secondary buildings.

4. Click **Search**.
   By default, the search results first shows the primary building with spaces available in that building. Building card shows details like the building name, the campus that a building belongs to, and the number of spaces selected in a building.

   If auto-search is enabled, the search results are automatically displayed. For more information, see Create a reservation.

5. Switch between the **Card view** and **Schedule view** tabs to review and select the available spaces.
   In the schedule view, for a selected building, you can see the date and time as applicable. The bottom pane will show the number of items that you've selected from the search results.
6. If your organization has uploaded floor maps, view the **Floor maps** using Mappedin or Indoor Mapping map providers.
7. To revisit and update the search criteria, click **Edit search**.

   Click the remove building icon (✕) to remove a building. If you remove a secondary building, the spaces associated with the building are also removed.
8. Click **Next**.

   If you missed adding a space to a building, the application alerts to add a space. A space must always be added to a primary building. Select a building card and click **Add** to add selected spaces from the search results.

   After adding a space or room to a building, you're taken to the Reservation details page.
9. Click **Add Services** to add room configurations or catering for selected spaces.
10. Review the reservation summary details.
11. Click **Submit Reservation**.

> **Note:** When you create a multi-building reservation using the Workplace Reservation Management application and synchronize it with the Workplace Calendar Synchronization service and later on, if you update this reservation in calendar service by removing all spaces from a primary building, then, the primary building will continue to remain as a primary building with no reserved spaces.
>
> This behavior is different when compared to multi-building reservations created using the Workplace Reservation Management application, as it does not allow you to proceed with the reservation if you have not selected a space in the primary building.

Create neighborhood reservations

Reserve neighborhood spaces using Advanced reservation.

Before you begin

The option to reserve neighborhood spaces is available only if your administrator has enabled the **Enable browse by neighborhood** option on the Reservable Module Configuration. For more information, see Configure a reservable module.

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The employee can see and select neighborhoods on the reservation portal only when:

- The employee is assigned to the neighborhood, and the neighborhood is restricted.
- The employee is assigned to the neighborhood, and the neighborhood is not restricted.
- The neighborhood is not restricted and the employee is not assigned to it.

Role required: sn_wsd_core.workplace_user

Procedure

1. Select any of the following context menu navigation options to make a neighborhood reservation.

Location	Steps
Application navigation filter	Navigate to **All** > **Workplace Reservation Management** > **Portal** > **New Reservation**.
From Employee Center Portal	○ Navigate to **All** > **Self-Service** > **Employee Center**. ○ On the Employee Center portal, select **Workplace Services** > **Browse Workplace Services**. ○ Select the **New general reservation** card. Make a reservation portal page opens for you to make workplace reservations. ○ Another way to make reservation is to use chat icon. On the home page, select the chat icon (). To make a reservation, en ter your question or select **Show Me Every thing** to select from the list of available op tions.

   The Make a Reservation page opens in a new tab.

2. Select a Reservable Module configuration.

   For example, select any of the following Reservable Module configuraiton. For more information, see Configure a reservable module.

   - Desks
   - Desks with an Area
   - Meeting rooms require approval
   - Meeting rooms
   - Desks with a shift

3. To search for reservable spaces in a neighborhood, select **Browse by Neighborhood**.

   Note: The **Browse by Neighborhood** option is only available if the **Enable browse by neighborhood** option is selected on the Reservable Module configuration page. For more information, see Configure a reservable module.

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4. Complete the following information.

   Fill in the form fields.

Make a reservation form

Field Name	Description
Building	Name of the building for a selected campus. Select a building from the list. For example, Demo Campus. The building names and location names are alphabetically sorted or sorted according to the **Order** that you have configured on the Buildings and Regions tables. When a sort **Order** is configured for a building or region, the building names and locations are sorted accordingly. If the sorting **Order** value isn't specified for an item, the items are listed on top of the list (ascending order), and sorted alphabetically. The building names and location names are alphabetically sorted based on the label name. For example Building A, Building B, and so on.
Floor	Floor of a building where you want to make a reservation. The floor names are either alphabetically sorted or the values are sorted based on the indicated sort order. You can configure the sort **Order** in the Floors table. If the sorting **Order** value is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The Floor names are alphabetically sorted based on the names and labels.
From **Note:** The time directive fields (From, time, To) are also available on the MESP (Mobile Employee Service Portal) on the Now Mobile app.	Start date of your reservation. For a single day reservation, only the **From** field is shown and not the option to enter the end date. ○ Employees can't select a date and create a reservation if the start date exceeds the Max days in future Reservable module value. Thisn't value is configured on the Reservable module by your administrator. For more information, see Configure a reservable module. When the Max days in future value is configured by your administrator, you can't select a date past the max allowed date. The dates in the calendar date picker are inactive for dates that are too far in future.

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Field Name	Description
	Note: If the Max days in future value isn't configured, the date selection isn't restricted. Date selection is based on the Max number of occurrences value. For more information, see Configure a reservable module. ○ If you enter an invalid date which is greater than what is specified in the **Max days in future** value, the application resets the date to the current date.
Time	Start time when the reservation begins. Employees can select time using the drop-down list or by entering the time in the field. The time increment value depends on the value set by your administrator. Default reservation time duration available for selection is 30 minutes. The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Service Portal Widget instances. The start time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes. **Note:** You can't select a date that occurs in the past. The time for a selected location depends on the building time zone.
To	End date of your reservation. Employees can't select a date and create a reservation when the End date exceeds the Max days in future value. The Max days in future value specifies the maximum number of the days in the future up to which the Reservable module can be reserved. **Note:** In the case of a single day reservation, option to enter the end date isn't available. If you enter an invalid date which is greater than what is specified in the **Max days in future** value, the application resets the date to the current date.

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Field Name	Description
	Note: If the **Max days in future** value isn't enabled, then the date selection isn't restricted and is based on the **Max number of occurrences** value configured in the Reservable module. For more information, see Configure a reservable module.
Time	End time when you would stop using the workplace item. Employees can select the end time using the drop-down list or by entering the time in the field. The end time increment value depends on the value set by your administrator. Default reservation end time duration is 30 minutes. The *time_picker_interval_size* property for reservation start time and reservation end time is configured using the Service Portal Widget instances. The start time and end time field increment value depends on the value set in the *time_picker_interval_size*. Default reservation time increment value duration is 30 minutes. **Note:** You can't select a date that occurs in the past. For example, If the start time is 09:00, you can select an end time after this duration. You can't select a time before 09:00 on the same day. The time for a selected location depends on the building time zone.
Recurring	Option to reserve the workplace items on a recurring basis. Specify the number of days and the number of times that you want to repeat the reservation in a recurring series. For weekly reservations, select the days of the week for the reservation. The Recurring option is displayed based on the configuration that your admin has set. Also, if there are any recurring reservation conflicts, they're auto-resolved if your admin has configured the same. Auto-resolve recurring conflicts</uicontrol> option is enabled on the Reservable module form. The application tries to auto-resolve recurring reservation conflicts. For more information, see Auto-resolve recurring reservations.

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Field Name	Description
	Note: Adding extra services option isn't available for Recurring reservations.
All day	Option to reserve the workplace item for an entire day or a single day. This option appears if your Workplace administrator has enabled the All day reservation setting on the selected **Type**. The start and end times of the reservation depend on the timings set by your organization. The **All day** option is also available on the Space details page. **Note:** The **All day** option's appearance depends on your administrator's configuration. If your admin has mandated all day reservation for a selected **Type**, the reservation is automatically made for the entire day. In case of All day you can only modify the Start date of the reservation.
Add another building	Reserve multiple workplace items spanning multiple buildings. The buildings time zones are different for a same date and time in a reservation. **Note:** This option is available if you have selected **Allow multiple reservations** check box on the **Reservable Module** > **Reservable Module Configuration** tab. For more information, see Create multi-building reservations.

5.

6. Click **Search**.
   The available spaces in a neighborhood are displayed.

   Note: Space admins or space planners determine if employees are permitted to view the neighborhoods on the location directory.

7. From the Search results, select **Add** to add a reservable space.
8. Switch between the **Card view** and **Schedule view** tabs to review and select the available spaces.
   In the schedule view for a selected building, you see the applicable date and time.
   The bottom pane shows the number of items that you've selected from the search results.
9. Select the **Map view** tab if your organization is using Indoor Mapping for interactive locations and wayfinding.
   The floor map shows the neighborhood spaces based on the availability and employee assignment.

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10. Click **Next**.

    Verify the reservation details for selected spaces.

11. Select **Add Services** to add room configurations or catering for selected spaces.
12. Review the Reservation Summary details.
13. Click **Submit Reservation**.
    If any of the items don't require approval, the selected workplace items are reserved. The status of the request is updated to **Confirmed**. If any of the items need approval, your request is submitted for approval. The status of the request is updated to **Awaiting approval**.

Create reservation for multiple workplace items

Reserve multiple workplace items for the same date and time in a single reservation.

Before you begin

Role required: sn_wsd_core.workplace_user

About this task

Reserve multiple workplace items at the same time, either for yourself or on behalf of others.

Before booking a room or desk, check the availability of the selected item using the Schedule view. Review the standard services that are available with the workplace items.

Note: As an admin or reservation manager, you cannot edit a reservation opened manually using a URL.

Procedure

1. Navigate to the Make a Reservation page from any of the following starting points.

Location	Steps
From application navigator	Navigate to **Workplace Reservation Management** > **Portal** > **New Reservation**.
From Employee Center Portal	○ Navigate to **All** > **Self-Service** > **Employee Center**. ○ On the Employee Center portal, select **Workplace Services** > **Browse Workplace Services**. ○ Select the **New general reservation** card. Make a reservation portal page opens for you to make workplace reservations.
From Workplace Service Portal	**a.** Navigate to **Workplace Core** > **Workplace service portal** > **Workplace Service Portal Home**. **Note:** You can also raise a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service.

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Location	Steps
	b. Open the reservation portal and do one of the following: ▪ Click **Reservations** > **Make a reservation**. ▪ Select **Make a reservation** on the home page directly. ▪ Select **New general reservation** from the Workplace services catalog. **i.** Select **Catalog** > **Browse by categories** > **Workplace Services Catalog**. **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog**. **ii.** Select **Reservation Management** > **New general reservation**.

The Make a Reservation page opens in a new tab.

2. Select a Reservable Module configuration such as **Desks**, **Meeting rooms Desks within an area** and so on.

   For more information how to configure a Reservable module, see Configure a reservable module.

3. Select **Search**.
   The available workplace items which match the search criteria appear.

   Note: While browsing near a person, if there are any private spaces, then they are not displayed in the search result.

   Note: You can switch between **Card view** tab and **Schedule view** tab to review the availability of workplace items. If your organization uses indoor map providers like Indoor Mapping or Mappedin, use the **Map view** to provide interactive locations and wayfinding to workplaces. Indoor Mapping is inbuilt map provider with WSD while Mappedin is a third-party map provider that is integrated with WSD. DXF maps are not supported.

4. **Optional:** Sort the workplace items in alphabetical order or by using a filter with the **Show filter** option.

   (Optional) You can also sort the workplace items to display your favorite locations first. To view the option, you must have access to the Employee Center and also have favorite locations. Your favorite locations are displayed first in an alphabetical order followed by the other locations that match the search criteria.

5. Select the workplace item that you want to reserve using any of the following options.
   - Click **Add**.
   - If you have selected the **Schedule view** tab, click **Add**.
   - If you have selected the **Map view** tab, select any space that is colored green and click **Add**.

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6. Select **Next**.
7. On the form, fill in the fields.

Reservation Details form

Field	Description
Reservation subject	Subject of your meeting.
Make subject private	Option to make reservation subject as private.
Make subject private	Option to mark the subject of the reservation as private.
Reserve these items together for the same person	Select this option to reserve all the workplaces for the same user.
This reservation is for	If you are requesting a reservation on someone else's behalf, select the name of that person. Leave this field empty if you are requesting a reservation for yourself.
Number of attendees	Number of people expected to attend the meeting.
Add invitees to this reservation section	**Note:** This section appears only if your administrator has enabled the configuration to invite attendees to this workplace location. This option will not appear if the **Number of attendees** option is displayed.
Invite coworkers	Select the employees whom you want to invite to the reservation.
Invite external visitor	Option to invite external visitor. **Note:** This option appears only if you have Workplace Visitor Management application installed. ○ If you have already registered the visitor before, do the following: **a.** Select **Previous visitor**. **b.** In the **Select a prior visitor** field, select the visitor. You can also preview the visitor details and modify any details if required. The details are updated automatically in all the visitor-related records and registration records. ○ If you are registering the visitor for the first time, do the following:

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Field	Description
	a. Select **Add new visitor**. b. Select the **Visitor type**. c. If the is a special guest, enable **VIP**. d. Enter the **First name** of the visitor. e. Enter the **Last name** of the visitor. f. Specify the **Email Address** of the visitor to send registration details and communications. g. Enter the **Phone number** of the visitor. h. Enter the **Organization** details of the visitor. i. Enter the **Title** of the visitor. j. Specify any private information in the **Private notes** section. k. Select their preferences in the **Visitor preferences** and **Notification preferences**. l. Click **Save and add** to add the visitor.
Sensitivity	Nature of your meeting. Select **Private** if you want to hold a confidential meeting. **Note:** When you mark a meeting as **Private**, the **Reservation subject** becomes hidden for other people and is displayed as ** **private** **. Only you or the person for whom you have requested this meeting can see the subject.

8. Click **Submit reservation**.

Result

If the items do not require any approval, the selected workplace items are reserved. The status of the request is updated to Confirmed.

If any of the items needs approval, then your request is submitted to the approver. The status of the request is updated to Awaiting approval.

What to do next

- To view, edit or cancel your reservations, see Share, modify, or cancel a reservation.
- To view, add or remove any invitees from the reservation, do the following:
  1. On the Reservation summary page, select the **Invitees** tab.
  2. To change the location of any invitees, do the following:
     a. Select the check box next to the invitee.
     b. Select **Actions** > **Assign to**.

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You can also select the actions icon ( ) next to the invitee details.

c. In the **New location assignment** field, select the location where you want to move the invitee.

d. Click **Send update**.

An email is sent to the invitees about the reservation changes.

3. To add or remove an invitee, do the following:

a. On the Reservation summary page, select **Actions** > **Change reservation details**.

b. In the Reservation details page, go to the **Add invitees to this reservation** section.

c. To add an invitee, select the invitee name from the search list.

d. To remove an invitee, click the remove icon ( ) near the invitee name.

e. Click **Update reservation details**.

If you have added an invitee, an email is sent to the invitee with the reservation details. If you have removed an invitee, an email is sent that the reservation is canceled.

Enable shift-based reservation

As an admin, enable employees to reserve a workplace item for a shift. Configure the spaces that can be reserved for a shift. Specify the users who can make shift-based reservation.

Before you begin

To enable shift-based reservation, select the **Apply to shift** field on the reservable module form of the workplace item.

Ensure you have the following information:

- Appropriate shift schedules.
- Data of the employees who would operate from the office in this shift.
- Data of the workplace spaces to be made available for this shift.

Ensure that the **Building** field on the Shift form has a value.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **Workplace Core** > **Shift Management** > **All**.
2. Select the shift to which you want to assign spaces and users.
3. To assign users to the shift, scroll down and click **Edit** in the Users related list.
   Only the assigned users can make reservations for this shift on the Reservation portal.
4. On the Edit members form, add users to the shift by doing the following.

a. Select the users from the **Collection** column on the left.

b. To move the selection to the **Users List** column on the right, use the add-remove icon.

c. Click **Save**.

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5. To assign spaces to the shift, scroll down and click **Edit** in the Locations related list.
   Only the assigned spaces are displayed for shift-based reservation on the Reservation portal.
6. On the Edit members form, add spaces to the shift by doing the following.

   a. Select the spaces from the **Collection** column on the left.

   b. To move the selection to the **Locations List** column on the right, use the add-remove icon.

   c. Click **Save**.

7. Click **Update**.

Result
The users and spaces are assigned to the shift. When an employee wants to make a shift reservation, the Reservation portal displays the following information:

- The shifts for which the employee can make a reservation.
- The spaces that are available for reservation in the selected shift.

Create a reservation along with a shared reservation

Reserve a workplace near to your co-worker using their shared reservation details.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure
1. Open the email containing the reservation details sent by your co-worker.
2. Review the reservation details and scroll down to the end of the email.
3. To search for all the available spaces that are available near the co-worker's workplace, select **Browse all spaces**.
   The Reservation portal is opened with pre-filled details as per your co-worker's reservation. You can select a suitable workplace by yourself.

   For more information on how to make a reservation on the Reservation portal, refer to Create a reservation.

4. To automatically reserve the most suitable and nearby space to your co-worker, select **Reserve a space for me**.
   An available and the most nearby space in your co-worker's building is reserved. The details are displayed in the Reservation summary page. The reservation is confirmed when the state changes to Confirmed.

   Note: This option is unavailable for multi-reservation.

Create a reservation including a virtual meeting link

Enable employees who are located outside the office to join a reservation by using a virtual meeting link. A virtual meeting link is created for an employee selected in "On behalf of".

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Before you begin

Note: You can create a virtual meeting link only if your administrator has enabled the virtual meeting configuration. For more information, see Configure a reservable purpose and Create a reservation.

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the Make a Reservation page from any of the following starting points.

Location	Steps
From application navigator	Navigate to **Workplace Reservation Management** > **Portal** > **New Reservation**.
Employee Center	**a.** Navigate to the Employee Center (**All** > **Self-service** > **Employee Center)**). On the home page, navigate to **Workplace** > **Browse all Workplace** and select the work place service. **b.** Open the reservation portal and do one of the following: ▪ Click **Reservations** > **Make a reservation**. ▪ On the homepage, select **Make a reservation** directly. ▪ From the Workplace services catalog, select **New general reservation**. **i.** Select **Catalog** > **Browse by categories** > **Workplace Services Catalog**. **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog**. **ii.** Select **Reservation Management** > **New general reservation**.

   The Make a Reservation page opens in a new tab.

2. Select the type of workplace item that you want to reserve.
   The types are displayed as tabs, such as a meeting room or desk.
3. **Optional:** Select **Browse all**.
   The **Browse all** reservable path is selected by default.
   a. Search for a workplace item that you want to reserve using the following available criteria.
4. Click **Search**.
   The workplace items which match the search criteria and which are available for reservation are displayed.

Note: While browsing near a person, if there are any private spaces, then they are not displayed in the search result.

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Note: You can switch between the **Card view** tab and **Schedule view** tab to review the availability of workplace items. If your company uploads floor maps, view the maps using Mappedin or Indoor Mapping. For more information on how to use floor maps, refer to Workplace Space Mapping.

5. **Optional:** Sort the workplace items in alphabetical order or by using a filter with the **Show filter** option.

   (Optional) You can also sort the workplace items to display your favorite locations first. To view the option, you must have access to the Employee Center and also have favorite locations. Your favorite locations are displayed first in an alphabetical order followed by the other locations that match the search criteria.

   Note: You cannot sort workplace items in alphabetical order or by your favorite locations if you are browsing spaces near a person. The spaces near a person are searched based on proximity.

6. Select the workplace item that you want to reserve using any of the following options:
   - Click **Add**.
   - In the **Schedule view** tab, click **Add**.
   - In the **Map view**, select any space that is colored green and then select **Add**.
7. Select **Next**.
8. On the form, fill in the fields.

Reservation details from

Field	Description
Reservation subject	Subject of your meeting.
Make subject private	Option to make reservation subject as private.
Make subject private	Option to mark the reservation as private and to hide the reservation subject.
Add a virtual meeting link	Option to generate a virtual meeting link so that remote employees can join the reservation. **Note:** - If a virtual link is not created successfully, the reservation details page doesn't display a meeting link and this option is cleared in the reservation record. To generate a meeting link again, select this option and submit the record. - If you add a meeting link for Microsoft Teams, the application retrieves meeting details while synchronizing the event with a calendar provider.

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Field	Description
This reservation is for	If you are requesting a reservation on someone else's behalf, select the name of that person. Leave the field empty if you are requesting a reservation for yourself.
Add invitees to this reservation section	**Note:** This section appears only if your administrator has enabled the configuration to invite attendees to this workplace location.
Invite coworkers	Select the employees whom you want to invite to the reservation.
Invite external visitor	Option to invite an external visitor. **Note:** This option appears only if you have the Workplace Visitor Management application installed. ○ If you have already registered the visitor before, do the following: **a.** Select **Previous visitor**. **b.** In the **Select a prior visitor** field, select the visitor. You can also preview the visitor details and modify if required. The details are updated automatically in all the visitor-related records and registration records. ○ If you are registering the visitor for the first time, do the following: **a.** Select **Add new visitor**. **b.** Select the **Visitor type**. **c.** If the visitor is a special guest, enable **VIP**. **d.** Enter the **First name** of the visitor. **e.** Enter the **Last name** of the visitor. **f.** Specify the **Email Address** of the visitor to send registration details and communications. **g.** Enter the **Phone number** of the visitor. **h.** Enter the **Organization** details of the visitor. **i.** Enter the **Title** of the visitor. **j.** In the **Private notes** section, specify any private information.

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Field	Description
	k. In the **Visitor preferences** and **Notification preferences** fields, select the visitor's preferences. l. Click **Save and add** to add the visitor.
Add extra services	Extra services available with the reservation.

9. Click **Submit reservation**.

Result

The reservation is created with a virtual meeting link. If you have invited attendees to the reservation, the meeting link is provided to them along with the reservation details.
To view the reservation recording, go to Reservation summary of the reservation and select **Additional details**. If passcode is configured for virtual meeting provider, then, in the **Additional details**, you can also view the relevant passcode. Only the organizer and the user specified in the **This reservation is for** field can view the passcode.

- Zoom: If a Zoom meeting link is added, the link appears in the **Location** field of the email containing the meeting invite.
- Microsoft Teams: When a reservation is created with a virtual meeting link, the application retrieves the meeting link and the joining-related details. When this reservation is synchronized with Microsoft Outlook calendar, the meeting link and the joining-related details are added to the body of the calendar event. Similarly, when a reservation is created in the Microsoft Outlook calendar using the **Teams meeting** toggle button, the meeting link is retrieved and saved as a virtual meeting link.

  Note: As the meeting link appears in the body of the email, in any case, if you want to update or change the meeting details, you must do it only using the Workplace Reservation Management. Because when a reservation synchronization is performed, the details (in this case, the meeting link and details) are synchronized only in one way, that is, from Workplace Reservation Management to the calendar provider(in this case Microsoft Teams). If you already made any changes to the meeting details or the notes from the calendar provider, it is overwritten by Workplace Reservation Management when a synchronization is performed.

- **Any other virtual meeting providers**: The meeting link is added in the **Location** field of the email containing the meeting invite.

Create a shift reservation

Reserve a workplace item for a shift. Create a single reservation or a recurring reservation for the same shift.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the Make a Reservation page from any of the following starting points.

Location	Steps
From application navigator	Navigate to **Workplace Reservation Management** > **Portal** > **New Reservation**.

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Location	Steps
Employee Center	**a.** Navigate to Employee Center (**All** > **Self-service** > **Employee Center)**). On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace ser vice. **Note:** **b.** Open the reservation portal and do one of the following: ▪ Click **Reservations** > **Make a reserva tion**. ▪ On the homepage, select **Make a reser vation**. ▪ From the Workplace services catalog, do the following: **i.** Select **Catalog** > **Browse by cate gories** > **Workplace Services Catalog**. **Note:** If there are multiple cat alogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog**. **ii.** Select **Reservation Management** > **New general reservation**.

The Make a Reservation page opens in a new tab.

2. Search for a workplace item that you want to reserve using the following available criteria.
   - **Building**: Name of the building.
   - **Type**: Workplace item that you want to reserve, such as a meeting room or desk.
   - **Shift schedule**: Shift for which you want to reserve a workplace item.
   - **Start date**: Date when you want to reserve the workplace item.
   - **Recurring**: Option for reserving the workplace item on a recurring basis.
   - **Recurring end date**: This option appears if you select the **Recurring** option. Select the end date of the recurring reservation.
3. Click **Search**.
   The workplace items which match the search criteria and which are available during this shift are displayed.

   Note: You can switch between the **Card view** tab and **Schedule view** tab to review the availability of workplace items. If your company uploads floor maps, view the maps using Mappedin or Indoor Mapping. For more information on how to use floor maps, refer to Workplace Space Mapping.

4. **Optional:** Sort the workplace items in alphabetical order or by using a filter with the **Show filter** option.

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(Optional) You can also sort the workplace items to display your favorite locations first. To view the option, you must have access to the Employee Center and also have favorite locations. Your favorite locations are displayed first in an alphabetical order followed by the other locations that match the search criteria.

5. Select the workplace item that you want to reserve using any of the following options.
   - Click **Add**.
   - If you have selected the **Schedule view** tab, click **Add**.
   - If you have selected the **Map view** tab, select any space that is colored green and click **Add**.
6. Select **Next**.
7. On the form, fill in the fields.

Reservation details form

Field	Description
Reservation subject	Subject of your meeting.
Sensitivity	Nature of your meeting. Select **Private** if you want to hold a confidential meeting. **Note:** When you mark a meeting as **Private**, the **Reservation subject** becomes hidden for other people and is displayed as ** **private** **. The only people who can see the subject are you or the person for whom you have requested this meeting.
This reservation is for	If you are requesting a reservation on someone else's behalf, select the name of that person. Leave this field empty if you are requesting a reservation for yourself.

8. Click **Submit reservation**.

Result

If the item does not require any approval, then the selected workplace item is reserved. The status of the request is updated to Confirmed.

If you requested reservation for an item that requires approval, then your request is submitted to the approver. The status of the request is updated to Awaiting approval.

What to do next

Review your reservation details. To edit or cancel your reservations, see Share, modify, or cancel a reservation.

Create a group reservation

Reserve multiple spaces for different users in a single group reservation.

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Before you begin

Note: Workplace users can make a group reservation only if the Reservable Module configuration property *Allow group reservation* is set by your workplace administrator. Make sure that the *Allow invitees* property is unchecked in the Reservation Widget Configuration. You cannot add or invite attendees to a group reservation. For more information, see Configure a reservable module.

Role required: sn_wsd_core.workplace_user

About this task

Reserve multiple spaces at a time for different employees in a single group reservation. After you submit the reservation, the reservations are created individually for each employee along with a parent reservation. You can view all the individual reservations in a single parent reservation and modify any details if required.
For example, if you are reserving four workplaces for four different employees. After you submit the reservation, a total of five reservations are created. The fifth reservation is the parent reservation where you can see all the child reservation details and update these reservations as required.

Procedure

1. Navigate to the Make a Reservation page from any of the following starting points.

Location	Steps
From application navigator search context menu	Navigate to **All** > **Workplace Reservation Management** > **Portal** > **New Reservation**.
Employee Center	**a.** Navigate to Employee Center (**All** > **Self-service** > **Employee Center)**). On the home page, navigate to **Workplace Services** > **Browse all Workplace Services**. **b.** Select **New general Reservation**.

   The Make a Reservation page opens in a new tab.

2. Select a Reservable module.
   By default, the **Desks** reservable module is selected.
3. Select a Reservable Path.
   By default, **Browse All** Reservable path is selected.

   - **Campus**: Option to select a campus.
   - **Building**: Option to select a building where you want to make the reservation.
   - **Start date**: Option to enter the start date for your reservation.
   - Time: Option to select the start time for your reservation. The time is displayed based on the selected building's time zone.
   - **End date**: Option to enter the end date for your reservation.
   - Time: Option to select the end time for your reservation.
   - All day: Option to create an all day reservation.
   - **Recurring**: Option to create a recurring reservation on a recurring basis. Select this field and specify the number of days and the number of times that you want to repeat the reservation. For weekly reservations, select the days of the week for reservation.
4. Select **Search**.

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The available workplace items that match the search criteria appear.

Note: You can select a space using **Card view**, **Map view** or **Schedule view**.

Map view displays workspace on a floor map. Make sure that you have configured Indoor Mapping as your map provider.

5. Select the workplace item that you want to reserve using any of the following options.
   - Select **Add**.

   Select multiple spaces as required for the group reservation. For example, if there's a group with five workspace users, you can add five spaces for a selected campus or location.
6. Select **Next** to reserve the selected spaces.
7. On the form, specify the reservation details.

   a. In the **Reservation subject**, the reservation name or subject is auto-populated. Change or modify the reservation subject, as required.

   b. **Optional:** To enable privacy for a selected workspace, check the **Mark space details private** check box.

   c. Clear the **Reserve these items together for the same person** option.

   Note: When the **Reserve these items together for the same person** is unchecked, the **This reservation is for** option is not displayed on the Reservation details page since this is a group reservation. The space cannot be reserved for a single workplace user.

   Selected spaces in a campus are displayed.
8. From a campus, select a workplace user from **This reservation is for** drop-down list.

   Provide a workplace user name for whom you are creating this reservation. Repeat this step for all the spaces displayed for a campus.
9. Click **Submit reservation**.

Result
The group reservation is created. You can view the reservation details on the Reservation summary page.

- Individual reservations are created for each user. Users can view the reservation details in their own My reservations page. They cannot edit or cancel the reservation.

  Note: You cannot share the details of a group reservation from the parent reservation directly. Instead, you can share the individual reservations that are created from the group reservation.

- To edit a reservation, open the parent reservation and click **Actions** > **Change reservation details**. After making the changes, click **Update reservation details**.

Share, modify, or cancel a reservation

You can view, modify (update), or cancel a reservation. Update the reserved workplace item or the date and time for a reservation.

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Before you begin
Role required: sn_wsd_core.workplace_user

About this task
When you submit a reservation, you receive an email notification with the details of your reservation and its status. However, you can also view the details of your reservations, modify or cancel your reservation, and track the progress of your reservation using the **My Reservations** page.

Note: As an admin or reservation manager, you cannot edit a reservation opened manually using a URL.

You can also view, edit, or cancel a reservation using the Virtual agent chat support. Navigate to **Workplace Core** > **Workplace service portal**, then select the chat icon ( ). Enter your question or select **Show Me Everything** to select from a list of available options to make your reservation changes.

You can also update the reserved workplace item in your reservation and change the date and time of the reservation.

Note: You can't edit a reservation made using Microsoft Exchange Online.

Procedure
1. Navigate to **My Reservations** page from any of the following starting points.

Location	Steps
From application navigator	Navigate to **Workplace Reservation Management** > **Portal** > **My Reservations**.
From Workplace Service Portal	**a.** Navigate to **Workplace Core** > **Workplace service portal** > **Workplace Service Portal Home**. **Note:** You can also raise or submit a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service. **b.** Open My reservations, then follow these steps: **i.** Select **Reservations** > **My reservations** **ii.** Select **Open my reservation list** from the Workplace services catalog.

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Location	Steps
	1. Select **Catalog** > **Browse by categories** > **Workplace Services Catalog** **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog**. 2. Select **Reservation Management** > **Open my reservation list**.

The **My Reservations** page opens in a new tab. All the reservations are listed according to the reservation date. The time is displayed based on the selected building's time zone.

2. **Optional:** To view the reservations that you have made on behalf of others, select **Requested for** > **Reserved for others** > **.**
3. **Optional:** Select **View** to view reservations based on their status such as **Upcoming**, **Pending**, **Past**, **Cancelled**, or **All**.
4. **Optional:** To search for a reservation, enter the details in **Search my reservation**.
5. Select a reservation to view its details.
   Review the details of your reservation such as reservation number, status, item details, and services available.
6. Perform the following actions on your reservation:

Actions that you can perform on a reservation

Action	Steps
Update a reservation	a. Select **Change reservation details** from the Actions list. b. On the form, update the information that you want to change. c. Select **Update reservation details**. **Note:** ○ If you're changing the location of a reservation, ensure that you change the location name in the subject in case it's mentioned. ○ If you have additional services in the reservation, the workplace service case remains open until all the service item requests are fulfilled. Based on the configuration set by the admin, unfulfilled service item requests are either updated, or canceled and recreated.

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Action	Steps
Update additional services of a reservation	**a.** Select **Change reservation details** from the Actions list. **b.** Select **Edit** for the service that you want to update. **c.** On the pop-up, perform either of the following steps based on your requirements: ▪ Add another service item ▪ Change the quantity of an existing item ▪ Remove an existing item **d.** Select **Update reservation details**. Service items that are within their lead time can't be modified. If a back-end error occurs and you're not able to edit the services, contact your admin or case manager to modify the service items. **Note:** Based on the configuration set by the admin, one of the following scenarios might occur when you edit a service: ○ The unfulfilled requests that have changes are moved to **Closed Skipped**, and only those requests are created again with the updated information. ○ All the unfulfilled service item requests are moved to **Closed Skipped**, and new requests are created with updated information.
Share reservation details	**a.** Select **Share reservation** from the Actions list. **b.** In the **Send reservation details to** field, select the users with whom you want to share the reservation. **c.** In the **Include a note**, enter a note if necessary. **d.** Select **Send**.

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Action	Steps
	The reservation details are shared via an email notification after the reservation is confirmed. **Note:** You can't share the details of a group reservation from the parent reservation directly. Instead, you can share the individual reservations that are created from the group reservation.
Cancel a reservation	**a.** Select **Cancel reservation** from the Actions list. **b.** Specify a reason for canceling the request in the **Cancel notes** field. **c.** Select **Yes**.

Result
The reservation is updated with your changes and an email notification is sent with the details of your reservation.

Reserve a workplace using the Quick Reservation widget

Reserve a workplace quickly by using the Quick Reservation widget in the Workplace Service Portal. The widget enables you to select from a list of available time slots instead of specifying the start and end times.

Before you begin
Role required: sn_wsd_core.workplace_user

About this task
With the Quick Reservation widget, you can directly make a quick reservation from the Workplace Service Portal home page. Specify the type of space that you are looking for, the date, the time slot, and the building in which you want to reserve a space. Depending on your specifications, the workplace that best matches your specifications is displayed. You can either make a reservation directly using the Quick reservation widget or use the Reservation portal to search for more suitable workplaces. Select **Advanced reservations** to open the Reservation portal.

Note: It is not possible to make a shift-based reservation using the Reservation widget.

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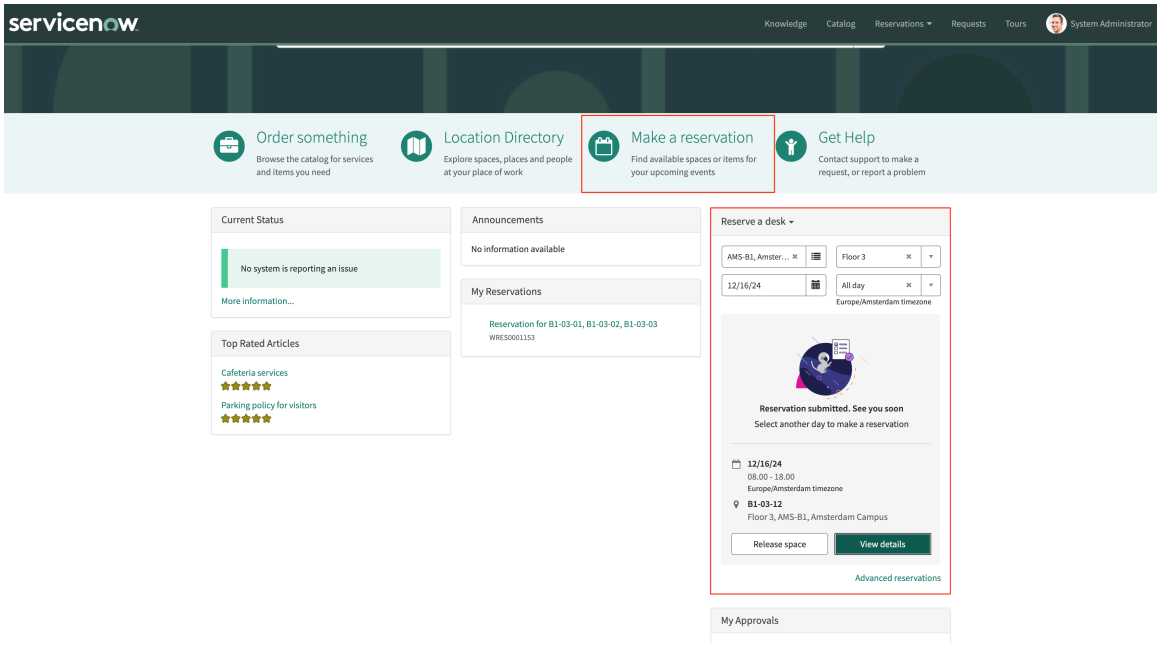

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Portal** > **New Reservation**.
2. Select the Quick Reservation widget on the home page.
3. In the Quick Reservation widget, specify the details to make a reservation.

   a. In the **Reserve a** field, select the type of workplace that you want to reserve.

   b. To select the date of reservation, click the calendar icon ( )

   c. In the **Time slot** field, select a time slot for which you want to make a reservation.

   > **Note:** Employees are not allowed to create a reservation too far in the future if they have enabled **Max days in future** value on the Reservable module. A warning message is shown in case if an employee tries to enter a date that is greater than the **Max days in future** value. For example, if the **Max days in future** value is 90 days, and if you try to select a date beyond 90 days, a warning message is displayed. For more information, see Create a reservation and Configure a reservable module.

   If the**Max days in future** value is not enabled, users can select a date as per the **Max number of occurrences** on the Reservable module.

   d. In the **Location** field, click the location selection icon to select the building where you want to make a reservation.

   e. In the **Floor** field, select the floor on which you want to make a reservation.

   f. If you want to change the privacy of the space, select or deselect the **Mark space details private** option.

The space that best matches the reservation criteria is displayed. If you have set favorite locations, then those locations are prioritized first for the best match.

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4. **Optional:** To set the space as favorite, click on the Favorite icon.


Note: The Favorite icon will appear only if you have access to the Employee Center.

5. To make the reservation, select **Reserve this desk**.

   If a space is part of a neighborhood, employees can see the neighborhood information on the space details card.

6. **Optional:** To apply more filter criteria or to view all the spaces that match the specified criteria on the Reservation portal, select **Advanced reservations**.
   For more information on how to make a reservation on the Reservation portal, see Create a reservation.

Result
The workplace is reserved for the selected time slot.
To view the details of the reservation, click **View details**. To cancel the reservation, click **Release space**.

Download an iCalendar for a reservation

Add the reservation to your office calendar by downloading the iCalendar of the reservation.

Before you begin
You can download an iCalendar only if your organization has enabled the configuration on the reserved workplace item.
Role required: sn_wsd_core.workplace_user

About this task
Download an iCalendar of a reservation directly from the Reservation summary page. After you download the iCalendar, an `.ics` file is generated which opens a meeting appointment window directly in your calendar provider application. You can review the details and save to add the appointment to your calendar.

For example, assume that your calendar provider is Microsoft Outlook. After you download an iCalendar of a reservation, the iCalendar opens a new meeting appointment window directly in Microsoft Outlook. You can view the details and click **Save and close** to add the reservation to your calendar.

Procedure
1. Navigate to **My Reservations** page from any of the following starting points.

Location	Steps
From the application navigator	Navigate to **Workplace Reservation Management** > **Portal** > **My Reservations**.
Employee Center	**a.** Navigate to Employee Center (**All** > **Self-Service** > **Employee Center**). On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service. **Note:** You can also submit a request from

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Location	Steps
	b. Open **My reservations,** and do one of the following: **i.** Click **Reservations** > **My reservations** **ii.** Select **Open my reservation list** from the Workplace services catalog, and do the following: **1.** Select **Catalog** > **Browse by categories** > **Workplace Services Catalog** **Note:** If there are multiple catalogs configured on the portal, then go to the Catalogs list and select **Workplace Services Catalog**. **2.** Select **Reservation Management** > **Open my reservation list**.

The **My Reservations** page opens in a new tab.

2. Click the reservation for which you want to download an iCalendar.
3. Click **Actions**.
4. Select **Download iCalendar**.
   An `.ics` file is downloaded.
5. Open the downloaded `.ics` file.
   The `.ics` file opens an appointment window directly in your calendar. For example, if you are using Microsoft Outlook, when you open the `.ics` file, an appointment window opens directly in Outlook.
6. Review the reservation details if required.
7. Save the reservation.

Result

The reservation is added to your calendar.

Manage employee reservations

Using the Reservation Overview, workplace managers and reservation desk executives can monitor the reservations created and scheduled for a location. They can also view the reservations they have created on behalf of their employees. They can use the dashboard to track the trend of reservations over a time period.

After an employee submits a reservation for a workplace item for a given date, the reservation is confirmed based on the availability of that item. If the workplace item requires an approval before reservation, the approver receives an approval request in the approval queue.

If the workplace item is unavailable for the specified day or time, the request moves to the Conflicted state. As a workplace manager, you can review the reservations submitted by the employees for that day. You can view the reservations that you created, all the reservations, and the reservations scheduled for that day. For more information, see View or update reservations.

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Based on the pending reservations for the items that require approval you can take appropriate actions to complete the reservation. For more information, see Approve a reservation.

Event planner

In the Workplace Central workspace, the Workplace Reservation Event Planner enables you to track your organization's reservations from a single workspace. In the Event planner, using a schedule view, you can view reservation details, optimize reservations by dragging, and manage multiple workplace reservations at a time. You can access the Event planner dashboard with both Reservation planner and Reservation viewer roles. The Event planner provides you with a schedule view of all the reservations requested by the employees and also the reservations that are requested by you. You can access the Event planner both as a reservation planner and a reservation viewer. As a reservation planner, you can manage the reservations on behalf of the employees.

For more information, refer to Event Planner.

View or update reservations

View or update reservation requests submitted through the Reservation portal. You can view the current day's reservations and the ones made by you for the others.

Before you begin

Role required: sn_wsd_rsv.admin or sn_wsd_rsv.manager

About this task

You can view all the reservations made through the application an update accordingly.

Note: You can also view and edit reservations on the Reservation portal.

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Reservation Overview**.
2. Select any of the following options to view reservations:
   - **My Reservations**: Select this option to view the reservations that you created.
   - **All Reservations**: Select this option to view all the reservations made through the application.
   - **Today's Reservations**: Select this option to view the current day's reservations.
3. Select a reservation request to view its details.
4. **Optional:** Review the reservation details in the **Reservation Details** and **Cancel Details** tabs.

   Note: The **Cancel Details** is populated only when the submitter cancels the reservation request.

5. **Optional:** Click **Open Reservation** to view the reservation details in the portal.
6. **Optional:** If you want to update the reservation information, modify the information and then click **Update**.

Approve a reservation

Review employee reservations raised using Workplace Reservation Management and approve or reject them.

Before you begin

Role required: approver_user

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Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select the reservation that you want to approve or reject.
3. **Optional:** Review the details of the reservation.
4. Approve or reject the reservation by selecting **Approve** or **Reject**.

Print workplace reservations

Using the Reservation Overview, workplace managers and reservation desk executives can print the reservations created and scheduled for a location.

Before you begin

Note: Enable the Print reservation feature by installing the Document Templates plugin.

Role required: sn_wsd_rsv.reservation_planner or sn_wsd_rsv.reservation_viewer

About this task

The report contains the reservation details and the requested service item details.

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Reservation Overview**.
2. Select any of the following options to view reservations:
   - **My Reservations**: Select this option to view the reservations that you created.
   - **All Reservations**: Select this option to view all the reservations made through the application.
   - **Today's Reservations**: Select this option to view the current day's reservations.
3. Select a reservation request to view its details.
4. Select **Print reservation**.
   The downloaded document displays the workplace reservation and the associated service details.

   Note: The Print reservation feature is only available for single- and multi-child reservations and isn't available for blocker reservations and multi-parent reservations.

Manage Workplace Reservations for Microsoft Outlook Add-in

Employees can create reservations using the Microsoft Outlook Add-in. They can calendar events or meetings to the Workplace Reservation Management 3.0.2 manifest add-in file.

As of Workplace Reservation Management version 3.0.2, you're no longer required to install the Microsoft Outlook Add-in plugin. The advanced search widget in the Workplace Reservation Management 3.0.2 version is used for Outlook Add-in reservations. The advanced search widget in the Workplace Reservation Management 3.0.2 version is used for Microsoft Outlook Add-in reservations. To use Microsoft Outlook Add-in, install and configure Workplace Calendar Synchronization. Administrators can configure the manifest add-in file to complement integration with Workplace Calendar Synchronization.

Employees can enable advanced search to filter spaces, work with a reservable module, and make multi-building space selection. Employees can search for a space using the **Map** or **Card** options while making reservations. Employees can update current or existing reservations quickly by updating date, time, location, or workplace services.

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When a meeting is created in Microsoft Outlook, the meeting event on the resource is synchronized with Workplace Reservation Management to create a reservation.

Workplace Reservation Management administrators can enable the Reservable module configuration for Microsoft Outlook Add-in. They can migrate or update existing Microsoft Outlook add-in version 1.12.2 or earlier versions to the latest Workplace Reservation Management 3.0.2 For more information, see Configure Reservable Module for Microsoft Outlook.

Employees can perform the following using Workplace Reservation Management 3.0.2.

Note: Shift-based, Reservable Modules aren't supported for Microsoft Outlook add-in reservations. Group and recurring reservations are also not supported.

- Create reservations using a Reservable Module (for example Meeting rooms).
- Create reservations for multi-building and recurring reservations.
- Select reservable paths based on the neighborhood or Browse near a person.
- Invite colleagues or guests to a meeting or event.
- Edit and update existing reservations.
- Add workplace services and edit or remove them as required.

  Extra services (catering, IT support, furniture arrangements, and so on) can be configured and requested alongside workplace reservations.

Workplace calendar synchronization allows employees to use Calendar Providers (MS Outlook or Google) to create reservation records in Workplace Reservation Management. For more information, see Microsoft Exchange Online - Calendar synchronization.

Configure Reservable Module for Microsoft Outlook

Configure Reservable Module settings for Microsoft Outlook in Workplace Reservation Management version 3.0.2. Employees can create a meeting or an event in the Microsoft Outlook calendar, and reserve a space using the Workplace Reservation Management manifest add-in file.

Before you begin

Configure the Reservable module for Microsoft Outlook Add-in, and configure it with a Reservable Module.

Note: Employees assigned to one or more Reservable Modules should have the sn_wsd.workplace_user role.

Note: If you're updating or migrating from Microsoft Outlook Add-in 1.12.2 version or earlier to Workplace Reservation Management 3.0.2, the *sn_wsd_msaddin.default_reservable_module* is updated automatically. The sys_id of the default Reservable Module in this property is updated to the latest version of the Outlook Add-in Manifest file. After installing Workplace Reservation Management 3.0, employees can select the updated Reservable Module (for example, Desks). They can also opt to use any other Reservable Module assigned to them.

Install and configure the following:

- Workplace Reservation Management
- Workplace Core
- Workplace Calendar Synchronization
- Workplace Indoor Mapping

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- Workplace Case Management
- Workplace Space Management

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Reservable Module**.
2. Select a Reservable Module.
   For example: Meeting rooms
3. The Reservable Module form opens.

   On the form, fill in the fields:

Reservable Module form

Field	Description
Name	Name for the reservable module. For example, for meeting rooms, the name should be categorical like meeting rooms or rooms.
Title	Title for the reservable module. The title is displayed on headline on reservation page on portal. For example, meeting rooms.
Inline Title	Inline Title for the reservable module. The title is displayed inline with a descriptive text on the reservation Portal. For example, meeting rooms.
Order	Order in which the reservable module must appear on the Reservation portal. For example, 100
Active	Option to enable the reservable module available for reservation. Select the check box to enable it.
Active from	Date from when the reservable module must be active and available for reservation.

Administrators can configure the following form options:

- **Reservable Table Configuration**

  Option to configure buildings and spaces for a location.

- **Reservable Module Configuration**

  Option to select the Outlook Add-in configurations for multi-building, neighborhood reservations, and so on.

- **Reservable Widget Configuration**

  Option to configure invitees, reservation subject, reservation cancel notes, additional details record producer, display reservation on behalf of, and so on.

For more information, see Configure a reservable module.

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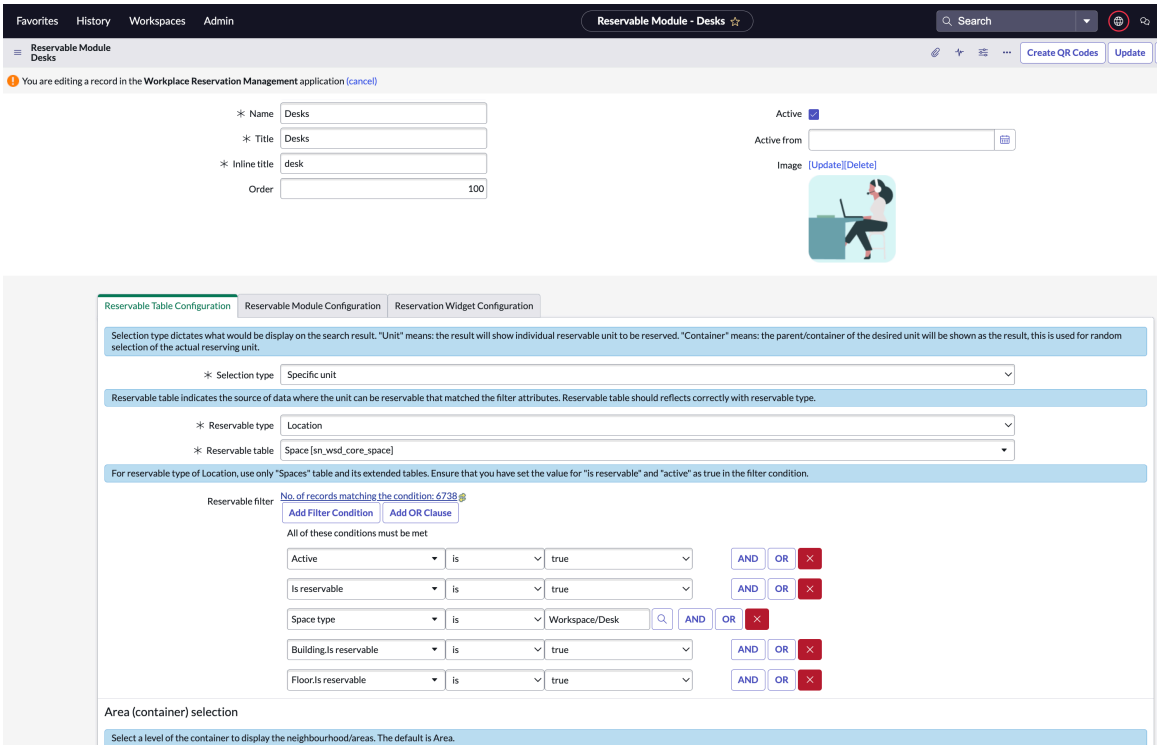
4. Select the **Reservable Table Configuration** tab to configure locations for reservation.



On the form, fill in the fields.

Reservable Table Configuration

Selection type	Type of selection to display in the search results when employees search. Select one of the following options: ○ **Specific unit**: The search result displays every workplace item. ○ **Container**: The search result displays the parent or container of the workplace items. If you select **Container**, the search results are displayed in groups with a defined quantity available for reservation. Employees can select a container to reserve and any available space from the container is assigned for reservation.
Reservable type	Type of the reservable item. For example, Location
Reservable table	Option to select the workplace items for reservation from a table. The table contains the reservable workplace spaces or items. **Note:** If you have selected **Location** as **Reservable type**, you should use only the Space [sn_wsd_core_space] table and its extended tables.

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Reservable filter	Option to apply filter conditions on the reservable items in the Reservable table. The reservable items are displayed on the application based on the given conditions. ○ To add a condition, select **Add Filter Condition**. ○ To add an OR condition, select **Add "OR" Clause**. For example: Active = True & Is reservable = True & Space type = Desk & Building.Isreservable = True & Floor.is reservable= true **Note:** If you're adding a filter on a location, verify that the **Active** and **Is reservable** fields are set to **True**. If these values aren't selected, inactive items or non- reservable items are displayed while making a reservation.
Area (Container) selection section	Enter the required field values.
Reservable container field	Specify on what basis that the reservable module should be grouped. The field appears only if you have selected **Container** value in the **Selection type** field. The field is automatically set to **Area**. For example, when the field is set to **Area**, the reservation search results appear as groups based on areas.
Reservable quantity field	Option to specify the reservable quantity for workplace items. The **Reservable Quantity** field determines the number of times a location or reservable items can be booked within a specific reservation time period. This setting provides flexibility in configuring space reservations without out the need to create individual space records for reservation. For example, if you select **Reservable Quantity**, the container can be reserved as many times as the combined reservable quantity values of all spaces within that container. The reservable quantity depends on the number of spaces provided in the Capacity column of the Workplace Core Space table.

5. Select the **Reservable Module Configuration** tab.

Note: Recurring, shift-based, and group reservations aren't supported for Microsoft Outlook add-in reservations.

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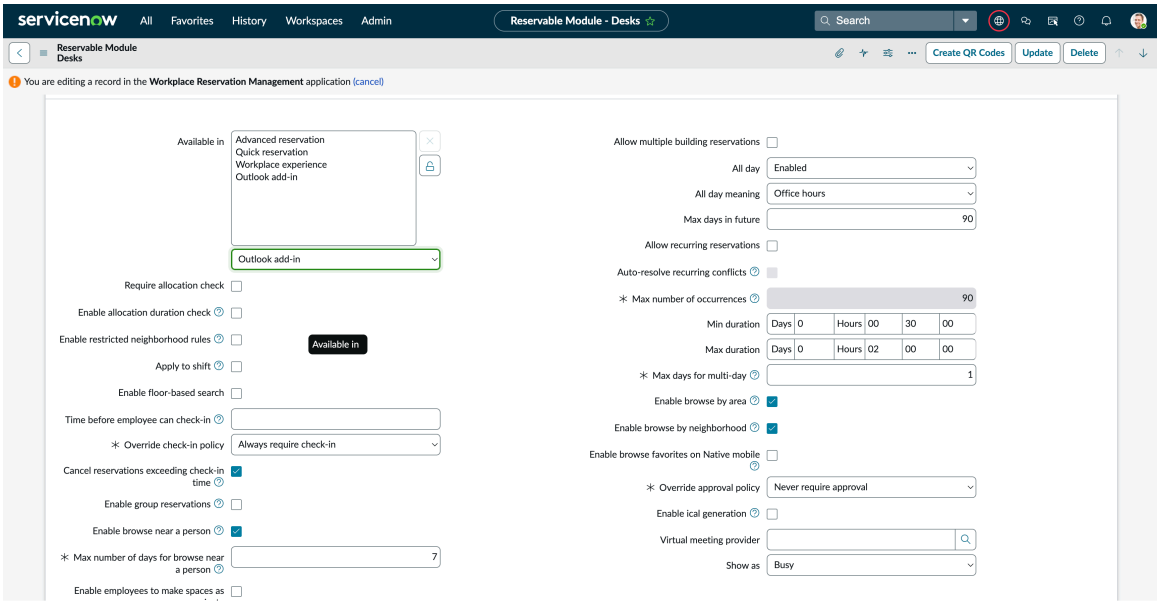

On the form, fill in the fields.

Reservable Module Configuration

Field	Description
Available in	Select **Outlook Add-in** to enable Microsoft Outlook Add-in reservations. For more information, see Create a reservation in Microsoft Outlook add-in **Note:** If you're updating or migrating from Microsoft Outlook Add-in 1.12.2 or earlier, the default Reservable Module's sys_id in the `sn_wsd_msaddin.default_reservable_modul` is updated to Workplace Reservation Management 3.0.2. Employees can continue using the default Reservable Module after migrating. They can also use a different Reservable Module assigned to them. For more information, see Manage Workplace Reservations for Microsoft Outlook Add-in.
Require allocation check	Option to check if there's an allocation mismatch between the workspace item and the logged-in user. This option appears only if you have Workplace Space Management installed. For workplace entities, the search results also display locations that are allocated to the parent entity.
Enable allocation duration check	Option to display spaces in the search results based on the start and end dates of the

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Field	Description
	allocation. This field appears only when the **Require allocation check** field is selected. For recurring reservations, the allocation duration is only checked for the first occurrence. **Note:** ○ In Workplace Space Management version 1.12.0, spaces that have the overlapping allocation and reservation time-frames are qualified for the reservation. ○ From Workplace Space Management version 1.13.0, spaces that don't have overlapping allocation and reservation time-frames are considered unallocated spaces and are qualified for reservation.
Enable restricted neighborhood rules	Option to apply neighborhood restrictions on the spaces while displaying search results. The search results are displayed based on the restrictions applied on spaces. Restricted users can't view spaces that they aren't enabled to access. The restricted neighborhoods are automatically filtered out if the logged-in user is restricted.
Enable browse by area	Option to enable employees to search for a workplace based on area.
Enable browse by neighborhood	Reservation admin can indicate if neighborhood spaces are available for reservations. Employees can search in the context of a neighborhood and only the available spaces in a neighborhood are displayed for space reservation. For more information, see Create neighborhood reservations. This option is also available on the Now Mobile app.
Enable browse favorites on Native Mobile	Option to enable employees to search from their favorite spaces on the Now Mobile app. **Note:** This option appears only if you have Employee Center 25.0.0 and for employees who have Now Mobile app installed. Verify that the Mobile Employee Service Portal is enabled. **Note:** This option is available only for the Now Mobile app app.

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Field	Description
Override approval policy	Option to specify how to implement the approval policy. Choices are as follows: ○ **No override**: The approval policy is implemented as set in the **Requires approval** field of a workplace space or room. ○ **Always require approval**: The approval policy is required regardless of what is set in the **Requires approval** field of a workplace space or room. ○ **Never require approval**: The approval policy is removed irrespective of what is set in the **Requires approval** field of a workplace space or room.
Apply to shift	Option to enable shift-based reservation on the module. **Note:** Shift-based reservations aren't supported for Microsoft Outlook Add-in reservations.
Enable floor-based search	Option to enable employees to search for a workplace based on floor using the **Browse All**.
Time before employee can check-in	Option to specify the time before an employee can check in their reservation before it starts.
Override check-in policy	Option to specify how to implement the reservation check-in policy. Choices are as follows: ○ **No override**: The check-in policy is implemented as set in the **Requires check-in** field of a workplace space or room. ○ **Always require check-in**: The check-in policy is required regardless of what is set in the **Requires check-in** field of a workplace space or room. ○ **Never require check-in**: The check-in policy is removed irrespective of what is set in the **Requires check-in** field of a workplace space or room.
Cancel reservations exceeding check-in time	Option to cancel a reservation if an employee doesn't check in within the specified time.
Enable group reservation	Option to enable group reservation for a selected Reservable Module Configuration. For example, **Desks**.

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Field	Description
	Note: If the **Allow invitees** check box option is selected in the Reservation Widget Configuration, you can't make a group reservation. The Reservation Widget Configuration tab is available in the Reservable Module.
Enable employees to make spaces as private	Option to enable employees to make the space details private when they make a reservation. When an employee is creating a reservation, the option **Make space details private** is displayed only if the employees are allowed to override their privacy preference for the selected space. Whether an employee can override privacy or not depends on the location privacy setup.
Enable ical generation	Option to enable user to generate an icalendar. **Note:** A user can't download an iCalendar for spaces and reservations that already synchronizes with their calendar provider.
Default reservation path when editing a reservation	Option to set the context (Reservation Path) when editing a reservation. This option is also available on the Now Mobile app. The reservation paths define the available search criteria. Select any of the following options from the drop-down list: ○ **Based on reservation**: While editing a reservation, employees can search in the context (Reservation Path) used while creating a reservation. For example: **Browse all**,**Browse an area**, **Browse by neighborhood**. ○ **Browse all**: When editing a reservation, the context (path) is defaulted to **Browse all**. Employees can change the selected space or date and time of the reservation. For more information, see Create a reservation.

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Field	Description
	Note: This option isn't available on the Now Mobile app.
Virtual meeting provider	Select a virtual meeting provider to enable employees to create a virtual meeting link. If an employee selects the **Add a virtual meeting link** option, a virtual meeting link is automatically generated by the virtual meeting provider.
Allow Multiple Building Reservations	Option to add multiple buildings and select spaces from the buildings in a single reservation. The buildings can belong to different regions or locations and can be from different time zones. **Note:** Adding multiple buildings to a reservation is available only on the Workplace Service Portal. Recurring reservations aren't supported for multi-building reservations. For more information, see Create multi-building reservations.
Max days in future	Option to specify the maximum number of the days in the future up to which the reservable module can be reserved. For example, if you set the max number of days in future to **90**, employees can make future reservations on this module only up to 90 days in advance. If this option is enabled, employees can't select a date beyond the specified value in **Max days in future** while making a reservation. For more information, see Create a reservation. On Now Mobile app, if you try to select a date too far in the future than what is specified in the **Max days in future**, no results are returned.

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Field	Description
	Note: **Max days in future** field indicates that the user can't make a reservation beyond the number of days configured as the **Max days in future** value for any reservation. **Max days in future** is a reservation property and **Max number of occurrences** is a recurring reservation property. **Max days in future** value takes priority when both these options are used for the reservation. For example, if the **Max days in future** is 90 days, then the number of occurrences in the recurring reservation can't exceed 90 days even if the employee has initially configured the value for Max number of occurrences as 180 days in the Reservable module.
Max number of occurrences	Option to specify the maximum number of occurrences for recurring reservation that can be made on the reservable module. The default value is 180. This option depends on the **Allow recurring reservations** check box field. If **Allow recurring reservations** isn't selected, the **Max number of occurrences** field is inactive.
Min duration	Option to specify the minimum reservation duration of the reservable module.
Max duration	Option to specify the maximum reservation duration of the Reservable Module.
Max days for multi-day	Option to make a multi-day reservation. Employees can reserve an available space covering or spanning multiple days. For example, 5 days or more. For more information, see Create a multi-day reservation. Default value for this Reservable Module property is 1. To make a single day reservation, set the value to 1. Value 0 (zero) isn't enabled. When the **Max days for multi-day** value is more than 1, the **All day** option is inactive on the Reservation portal while making a reservation. **Note:** The number of days for this property must not exceed the **Max days in future** value on the Reservable Module.

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Field	Description
Enable browse near a person	Option to enable employees to search for spaces near a person. When an employee searches for a space near a person, the available spaces located on the user's floor are displayed. The display criteria are also based on the nearby area of the space or tags assigned to the spaces. **Note:** If the option is enabled, the search limit criteria are not applicable.
Max number of days for browse near a person	Option to specify the number of days employees can reserve a space near a colleague. Admins can configure the maximum number of days an employee would like to reserve a space near a colleague using this property. Default value is 7. Administrators can change this value to more than 7 days and enable employees to select the max number of days they would like to book a seat near a team member or a colleague. For more information, see Create a reservation. **Note:** This field is displayed only when the **Enable browse near a person** Reservable module property is enabled on the Reservable Module. The number of days provided for this property can't be 0 or a negative number (for example, -10). The number of days for this property must not exceed the **Max days in future** value on the Reservable Module.
Allow all day reservation	Option to enable employees to reserve a workplace item of the module for an entire day. If the check box is cleared, the Require all day reservation field is inactive. Note: If the Max days for multi-day Reservable Module value is set to more than 1 day, the All day option is inactive on the Reservation portal. If the Max days for multi-day value is set to 1, then employees can only make a single day or all day reservation. For more information, see the Max days for multi-day property description. For example: Default value 9 AM to 5 PM.

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Field	Description
All day	Option to enable manage **All day** reservation option on the reservation portal. Select one of the following options: ○ Disabled: The **All day** option is disabled and not available for employees while making a reservation. The **All day** option isn't displayed on the Reservation portal. ○ Enabled: The **All day** option is available to the employees on the reservation portal. They can opt to select the option when required. ○ Default: The **All day** option is available and selected by default. The employees can opt not to select the check box or change the timings if necessary. ○ Required: The **All day** check box is selected and can't be changed on the reservation portal. The **All day** field is set as required.
Max days in future	Option to specify the maximum number of the days in the future up to which the reservable module can be reserved. For example, if the Max number of days in future is set to 90, employees can make future reservations only up to 90 days in advance. If this option is enabled, users can't select a date beyond the specified value in Max days in future while making a reservation. For more information, see Create a reservation. **Note:** **Max days in future** value indicates that the user can't make a reservation beyond the number of days configured in this option. Max days in future is a reservation property and Max number of occurrences is a recurring reservation property. Max days in future value takes priority when both these options are used in a reservation. For example, if the **Max days in future** is 90 days, the number of occurrences in the recurring reservation can't exceed 90 days even when an employee has initially configured the value for Max number of

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Field	Description
	occurrences as 180 days in the Reservable module.
Max number of occurrences	Option to specify the maximum number of occurrences for recurring reservation that can be made on the reservable module. The default value is 180. This option depends on the Allow recurring reservations check box field. When **Allow recurring reservations** check box isn't selected, the **Max number of occurrences** option is inactive.
Min duration	Option to specify the minimum reservation duration of the reservable module.
Max duration	Option to specify the maximum reservation duration of the reservable module.
Max days for multi-day	Option to make a multi-day reservation. Employees can reserve an available space covering or spanning multiple days. For example, 5 days or more. For more information, Create a multi-day reservation. Default value for this Reservable Module property is 1. To make a single day reservation, set the value to 1. Empty value or zero isn't enabled. When the Max days for multi-day value is more than 1, the **All day** option is inactive on the Reservation portal while making a reservation. **Note:** The number of days provided for this property must not exceed the Max days in future value on the Reservable Module.
Enable browse near a person	Option to enable users to search for spaces near a colleague or team member for better collaboration. When employees search for a space near a team member, available spaces near the team member are displayed. Select the check box to enable this option. **Note:** The search limit property value isn't enabled if this option is enabled.
Max number of days for browse near a person	Option to specify the number of days employees can reserve a space near a colleague. Administrators can configure the maximum number of days an employee would like to reserve a space near a colleague using this property.

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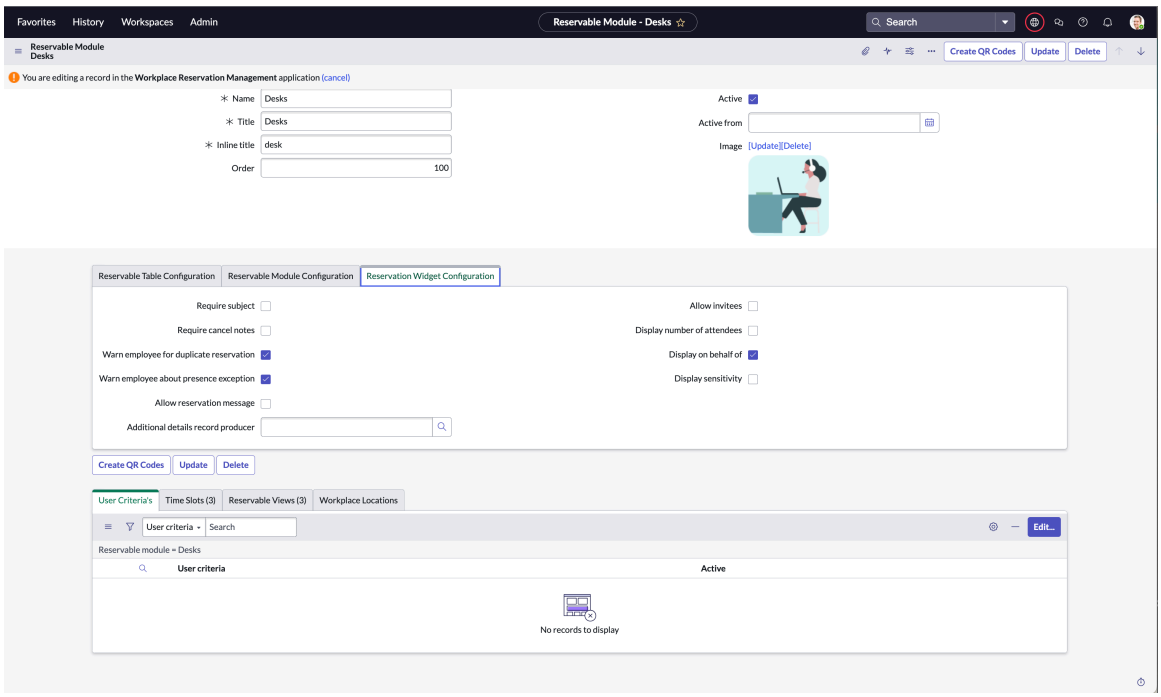
Field	Description
	Default value is 7. Administrators can change this value to more than 7 days and enable employees to select the max number of days to book a seat near a team member or a colleague. For more information, see Create a reservation. **Note:** This field is displayed only when the **Enable browse near a person** Reservable module property is enabled on the Reservable Module. The number of days provided for this property can't be empty, zero, or a negative integer (for example, -10). The number of days provided for this property must not exceed the **Max days in future** value.
Enable facet filter	Option to enable facet filter on the workplace items. If the select this option, the filter options are displayed based on the search results. Only the items that are available in the generated search result are available to users for selection in the filter.
Search limit	Option to specify the maximum limit of search results when an employee searches for a workplace location.

6. Select the **Reservation Widget Configuration** tab.



Fill in the form information:

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Reservable Widget Configuration

Field	Description
Requires subject	Option to make a reservation subject as required before making a reservation. If this check box is selected, employees should add a reservation subject before submitting their reservation.
Require cancel notes	Option to make a cancellation note required before making a cancellation.
Warn employee for duplicate reservation	Option to warn employees if a reservation exists for the selected space type module during the specified date and time for that employee. The warning is displayed based on the date and time specified in the search criteria.
Warn employee about presence exception	Option to warn employees if their presence is set to remote on the date of the reservation. The warning is displayed based on the presence routine of the employee. This option is available if Workplace Concierge is installed.
Allow invitees	Option to enable employees to invite attendees to their reservation. Employees can invite co-workers and also external visitors. ○ If the **Allow invitees** check box is selected, the **Display number of attendees** and **Enable Group Reservations** check box options are cleared and not selected by default. ○ If **Display number of attendees** is selected, the **Allow invitees** check box selection is unselected by default. **Note:** You can't make Group reservations for Microsoft Outlook Add-in.

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Field	Description
	Note: For Microsoft Outlook Add-in reservations, you should set the *sn_wsd_rsv.display_invitees_on_outlook* value to true. If the **Allow invitees** option is selected and the *sn_wsd_rsv.display_invitees_on_outlook* is set to true,employees can see the option to select invitees when making a reservation using Microsoft Outlook Add-in. For more information, see Properties installed with Workplace Reservation Management. If **Allow invitees** is set to false, and *sn_wsd_rsv.display_invitees_on_outlook* property is set to true, then the property value is given priority and employees are allowed to add invitees to a reservation. If **Allow invitees** is true, and *sn_wsd_rsv.display_invitees_on_outlook* is set to false, employees can't add invitees to a reservation.
Display number of attendees	Option to enable employees to specify the number of attendees while making a reservation. If the option isn't selected, then the number of attendees is automatically set to **1**. **Note:** If the **Allow invitees** check box is selected, the **Display number of attendees** becomes inactive and read only. The **Enable Group Reservations** check box in the **Reservable Module Configuration** tab also becomes read only and inactive. You can't make group reservations for Microsoft Outlook Add-in.
Display on behalf of	Option to enable employees to specify on whose behalf they're making a reservation. The option is enabled by default. An error is displayed if the option is inactive.
Display sensitivity	Option to enable employees to set the sensitivity of the reservation. They can set a reservation to **Normal** or **Private**. If the option isn't selected, the sensitivity is set to **Normal** and the subject will be visible to others.
Allow reservation message	Option to add notes to a meeting and attach images while making a reservation. The notes

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Field	Description
	and images can be shared with the meeting invitees. **Note:** When calendar synchronization is enabled for a space, the message or notes are added to the body of the reservation. For Now Mobile app, the message is displayed on the summary page but employees can't add or edit a message. For more information, see Create a reservation. .
Additional details record producer	Option to link to the record producer that you have configured with additional fields. You can display additional fields on the reservation form. For more information, refer to Configure reservable module with additional details.
Show as	Option to specify what status of the reservation that is shown on the employee's calendar when a reservation is synchronized. This field appears only if Workplace Calendar synchronization is installed. ○ **Busy**: The reservation is displayed in the Employee's calendar with a Busy status. The employee's calendar is blocked during the reservation duration. ○ **Free**: The reservation is displayed in the Employee's calendar with a Free status. The employee's calendar won't be blocked during the reservation duration. **Note:** For the **Show as** feature to work correctly, you must have the following versions of the Microsoft Outlook connections: ○ For Microsoft, you must have Microsoft Exchange Online spoke version 3.2.4. ○ For Google Calendar, you must have the Google Calendar version 2.3.1.

Redirect WSD RSV MOA OAuth registry

Redirect MOA Outh access (moa_login) for Microsoft Outlook Add-in version 1.12.2 or earlier to WSD RSV MOA OAuth registry (rsv_moa_login) registry.

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Before you begin

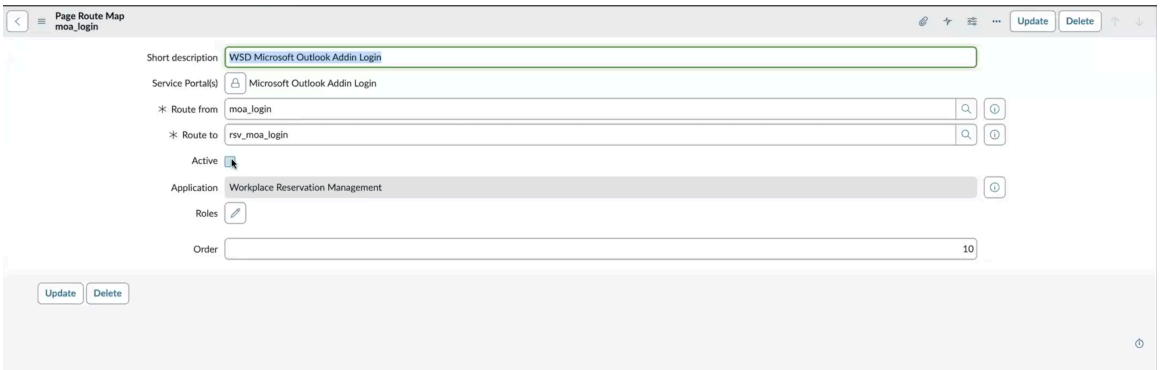
Workplace users using Microsoft Outlook Add-in version 1.12.2 or earlier versions, can migrate to Workplace Reservation Management 3.0.2. After migrating, redirect the MOA OAuth registry (moa_login) to WSD RSV MOA OAuth registry (rsv_moa_login).

Workplace Reservation Management 3.0.2 Microsoft Outlook Add-in capabilities provide enhanced reservation experience for employees. For more information, see Manage Workplace Reservations for Microsoft Outlook Add-in.

Role required: admin

Procedure

1. Navigate to **All** > **Services Portal** > **Page Route Map**.
2. Select **WSD Microsoft Outlook Add-in**.
   The Page Route Map form opens. By default, all field values are preloaded in the Page Route Map form. Select the edit option to edit the form.



Page Route Maps form

Field	Description
Short Description	Optional short description to describe the redirect.
Service Portal(s)	Portals that apply the redirect. If you don't select a portal, the redirect applies to all portals in the instance.
Route from	Original page you're redirecting from. For example, *moa_login*.
Route to	Page you're redirecting to. For example, *rsv_moa_login*.
Active	Page Route Map record is active or inactive. The redirect from *moa_login* to *rsv_moa_login* happens when the record is active.
Roles	Roles to which the page route map applies. Employees that don't have any of the roles specified in this field aren't redirected to the new page. If no roles are specified, the page route map is applicable to all users.
Order	Priority of the Page Route Map record. If more than one active record has the same value

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Field	Description
	in the **Route from** field, the record with the lowest order applies. The system evaluates records from lowest to highest. If multiple records have a matching order, the system prioritizes the oldest record.

3. Select or clear the **Active** check box.
   The **Active** check box is selected by default.

   When the **Active** check box is selected, MOA OAuth registry (moa_login) is redirected to WSD RSV MOA OAuth registry (rsv_moa_login) in Workplace Reservation Management 3.0.2 version.

   Note: If you don't want to redirect and update to rsv_moa_login and opt to use Microsoft Outlook Add-in 1.12.2 or earlier versions MOA OAuth registry (moa_login), clear the **Active** check box.

4. Select **Update** to save the changes you made to the Page Route Maps form.
   All references in the **Route from** field redirect to the page in the **Route to** field.

Activate the add-in for Microsoft Outlook

Workplace Reservation Management administrators can activate the manifest add-in for Microsoft Outlook. Add a manifest add-in file and customize it as per your requirements.

Before you begin

Download the sample manifest file *Workplace_Outlook_add_in_manifest_example.xml*. Navigate to ServiceNow® Store Workplace Reservation Management version 3.0.2. From the Links and Documents page, download the *Workplace_Outlook_add_in_manifest_example.xml* manifest file.

Note: If you are using Microsoft Outlook Add-in 1.12.2 version or earlier, update to Workplace Reservation Management 3.0.2. After installing and configuring Workplace Reservation Management 3.0.2, upload a new manifest file. Employees can create an event or a meeting invite in Outlook Calendar and make reservations using the manifest add-in file.

Role required: admin

Procedure

1. Navigate to where you have downloaded the sample manifest add-in file for Microsoft Outlook.
2. Open the sample manifest add-in file and make customizations as per your organizational requirements.

   In the sample manifest file, change the following parameters as required.

Sample Manifest file custom parameters

Field	Description
Id	Unique ID for the add-in
DisplayName	Display name of the add-in. The name is displayed in the Microsoft Outlook app ribbon.

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Field	Description
Description	Description about the add-in.
IconUrl	Link to the icon image. The icon is installed along with the application for the add-in. If you are setting your own icon, ensure that you specify a navigation (URL) link to the icon. The following icon formats are supported: ○ 16x16 ○ 32x32 ○ 64x64 ○ 80x80
Images	Link to the images used in the add-in, if any.
SupportUrl	Link to a supporting environment.
SourceLocation	Link to a supporting environment. You can link your own environment, or a different website.
URL	Link to the instance where the add-in is installed.

3. **Optional:** Save the manifest file with a different name.
   The manifest file for the add-in is created. Employees can now make reservations in Workplace Reservation Management using the add-in file. For more information, see Create a reservation in Microsoft Outlook add-in.

Upload the manifest file for a workplace employee

Upload the manifest file (add-in for Microsoft Outlook) for a workplace employee (single user). Employees can create workplace reservations using the Microsoft Outlook add-in file.

Before you begin

Activated the add-in for Microsoft Outlook. For more information, see Activate the add-in for Microsoft Outlook.

Role required: admin

Procedure

1. Open Microsoft Outlook mailbox.
2. Select an event in Outlook calendar.
3. From the Tools menu on the Outlook ribbon, select **Get Add-ins**.
4. In the Custom add-ins section, select **Add a custom add-in** > **Add from file**.

Upload the add-in file Microsoft Office 365

Upload the manifest file to Microsoft Office 365. Employees can view and use the add-in from Microsoft Office 365 Outlook.

Before you begin

Note: Workplace Reservations made using Microsoft Outlook Add-in application does not support Microsoft Exchange On-Premises.

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Role required: admin

Procedure

1. Log in to the Microsoft Office 365 admin account.
2. Select app launcher and select **Admin**.
3. In the admin center, go to **Settings** > **Services & add-ins**.
4. Select **Deploy Add-in** and select **Next** in the overview page.
5. Select **Upload custom apps**.
6. Select **I have the manifest (.xml) file** on this device check box.
7. Select **Choose file** to select the manifest file that you have created for the add-in.
8. Select **Upload**.
9. In the **Assign users section**, select one of the following options to specify whom to deploy the add-in.
   - Everyone: Select this option to deploy the add-in to everyone.
   - Specific users/groups: Select this option to deploy the add-in to only selected users or user groups. Use the search option to find users or groups to whom you want to deploy the add-in.
   - Just me: Select this option to deploy the add-in only to you.
10. In the Deployment method section, select an option to specify how to deploy the add-in to users.
11. Select **Deploy**.

    A green tick appears when the add-in deployment is successful. Follow the instructions provided on the page to test if the add-in deployment is successful.

    The add-in is uploaded to Microsoft Office 365. Employees can view the add-in option and make a workplace reservation while scheduling a meeting. For more information, see Create a reservation in Microsoft Outlook add-in.

Using Workplace Reservations for Microsoft Outlook Add-in

Make reservations in Microsoft Outlook using the Workplace Reservation Management manifest add-in file.

Employees can create and edit workplace reservations, delegate reservations on behalf of a team member, and add or remove workplace services.

Create a reservation in Microsoft Outlook add-in

Employees can create a workplace reservation in Microsoft Outlook. They can use the Workplace Reservation Management manifest add-in file for Microsoft Outlook add-in.

Before you begin

Install and configure the following:

- Workplace Reservation Management
- Workplace Calendar Synchronization
- Workplace Core
- Workplace Case Management

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- Workplace Concierge
- Indoor Mapping

Verify that you have completed the following Microsoft Outlook add-in manifest file configuration:

- Add a manifest file for Microsoft Outlook add-in
- Upload the manifest file in Microsoft Outlook Add-in. Depending on your usage, complete the following:
  - Upload the manifest file for a single user
  - Upload the manifest in Microsoft Outlook

  For more information, see Activate the add-in for Microsoft Outlook.

Role required: sn_wsd_core.workplace_user

Procedure

1. Open your mailbox in Microsoft Outlook to make a reservation.
2. Perform any one of the following actions depending on the type of reservation that you want to make:
   - To set up a meeting in Microsoft Outlook, open the calendar and select "New Event" or "New Meeting."
   - Complete the New Event form details in Outlook Calendar:
     - New Event: Option to provide the meeting title or subject.
     - Add Attendees: Add meeting attendees.Use **Optional** field to enter any optional meeting attendees.
     - Date: Option to select a Date for your reservation.
     - From: Option to select the start time of your reservation.
     - To: Option to select the end time of your reservation.
     - All day: Option to enable **All day** reservation. For more information, see Configure Reservable Module for Microsoft Outlook.
     - Add a location: Option to display the meeting location. The locations you select on the Make a reservation form on the Outlook side bar in Step 3 is added in this field option. You can also opt to end the location manually using this option.
     - Use the **Scheduling Assistant** in Microsoft Outlook calendar to find a time that works for everyone and add a location or online meeting details.
3. Select the **See more items** icon ( from the Microsoft Outlook ribbon, and, select the reservation add-in manifest file.

   For example: *Workplace_Outlook_add_in_manifest_example.xml*

   Note: When you open the add-in manifest file for the first time, the MOA OAuth login screen appears. Provide your instance login access credentials. When the manifest add-in file is opened for the first time, it takes some time to load and display the Make a Reservation form.

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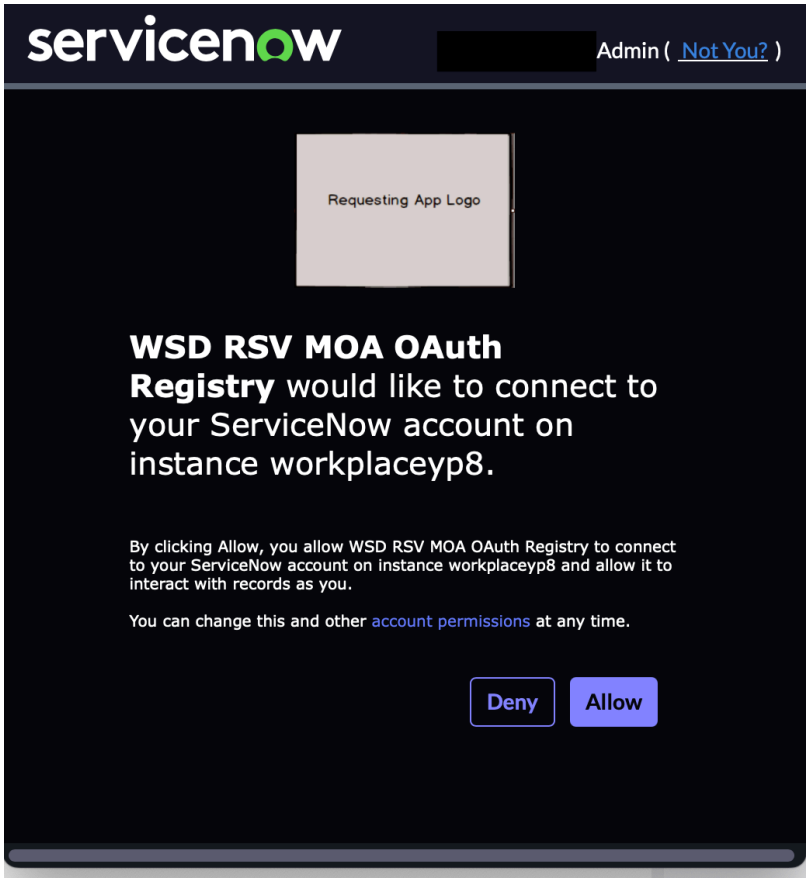

4. Select **Allow**.
5. The add-in opens in a sidebar and displays the Make a reservation form.

   Employees can search for a space and add locations for a given date and time. You can create multi-building reservations, neighborhood reservations, or make a reservation near your colleague. Employees can add workplace services to a reservation. They can edit a reservation or workplace services added to a reservation.

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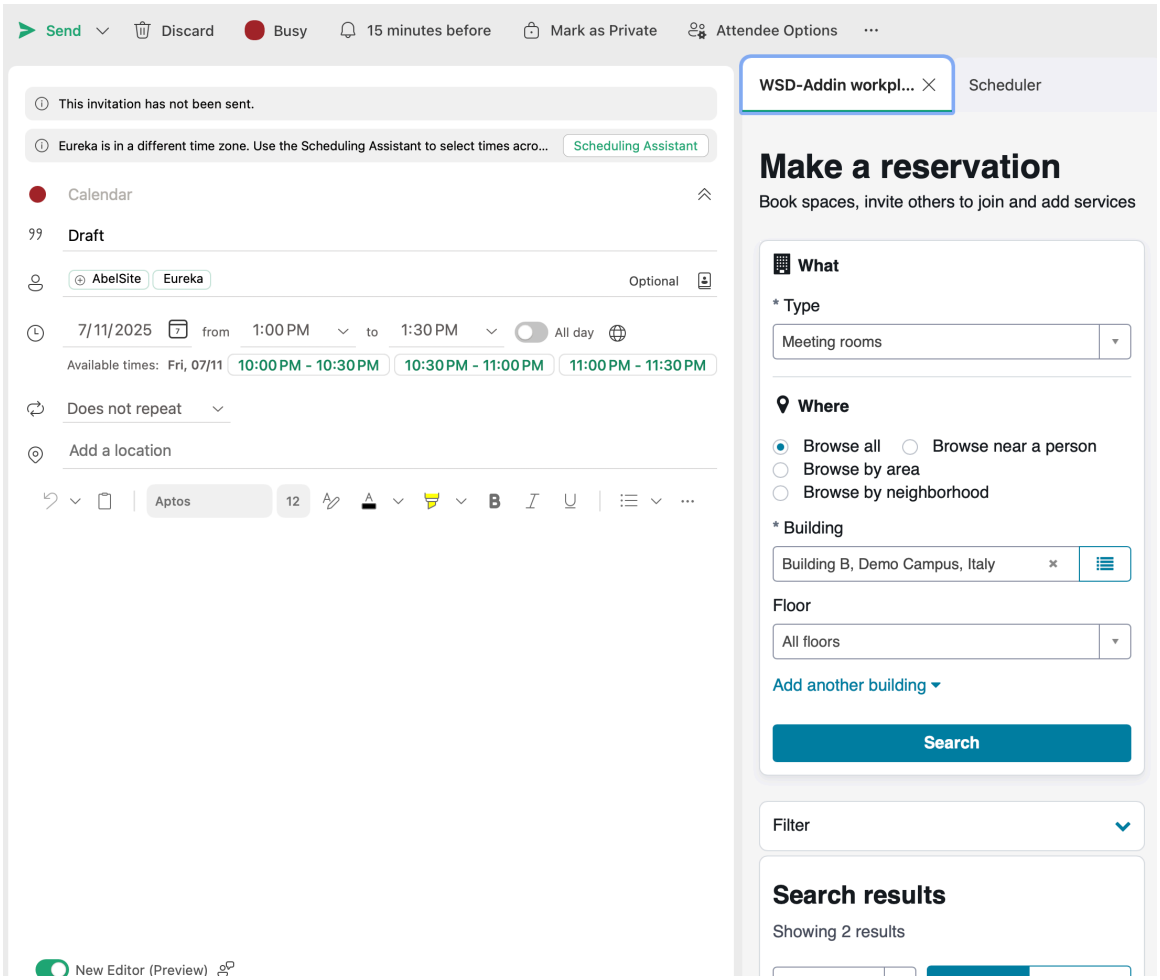

Fill in the field information:

Make a reservation form

Field	Description
Type	Option to select a Reservable Module type. For example: Meeting rooms **Note:** Employees can only select a Reservable Module assigned to them by their administrator. For more information, see Configure Reservable Module for Microsoft Outlook.
Where	Option to select a reservable path. ○ **Browse all** ○ **Browse by area** ○ **Browse by neighborhood** ○ **Browse near a person** For more information, see Create a reservation.

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Field	Description
	Note: **Browse by Shift** Reservable path is available for Microsoft Outlook Add-in reservations.
Building	Select a building where you want to make the reservation.
Floor	Select a Floor. **Note:** If the Reservable Module Configuration option **Enable floor-based search** option isn't configured by your administrator, this option to search by floors is displayed on the form. For more information, see Configure Reservable Module for Microsoft Outlook.
Add another building	Select this option to add another building to your reservation. You can create multi-building reservations using this option.

6. Select **Search** to search for a space.

   If the Auto-search option is enabled by your administrator, the Search button is not displayed and the spaces are fetched automatically for reservation.

   Note: Administrators can enable the auto-search by setting the *sn_wsd_rsv.enable_auto_search* system property to true. For more information, see Properties installed with Workplace Reservation Management.

   Note: If a selected room for a meeting invite or event has an email address configured to it, the search results shows only the room that is configured with the email configuration. For example, eureka@sncplatform.onmicrosoft.com. Microsoft Outlook doesn't show any other locations while you're searching for spaces while making a reservation. For more information, see Add a room using Workplace Space Management.

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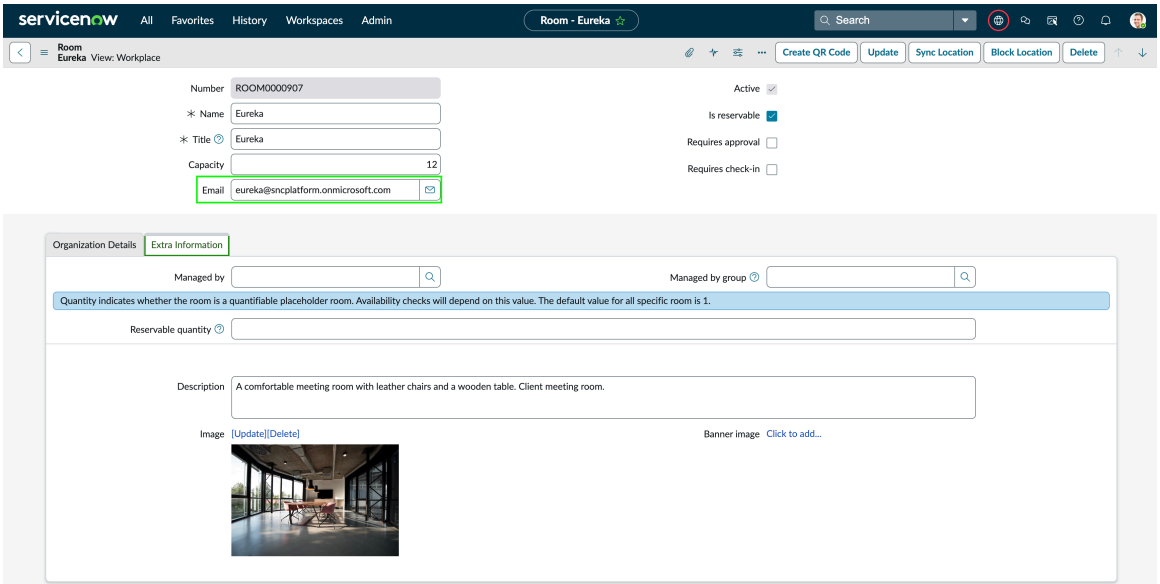

7. **Optional:** Select the **Filter** drop-down list to set filter criteria to search with the following criteria.

   - Minimum capacity: Option to increase or decrease the space capacity.
   - Services: Option to add services
   - Purposes: Option to add location purposes.
   - Floors: Option to include floor-based search in a selected building.

   Select **Clear all** to clear the filters.

   Select **Apply** to apply the filters.

8. The search results are displayed on the **Card** view and **Map** view. Employees can select the Card or Map view to reserve a space.
9. Select Card or Map view to view a space on the Card or Map view.

   Note: The Workplace Reservation Management by default assigns the following two views to a reservable module:

   - **Card**
   - **Schedule**

   Map view is only available when Indoor Mapping is active.

   a. Card view: Select the **Card** tab. View and select a location or locations using the Card View.

   b. Map view: Select the **Map** tab. View and select location or locations on the map.

   - Floor: Select a **Floor**.
   - Select a space on the map. The space details card is displayed. Select Add to add the space to your reservation.

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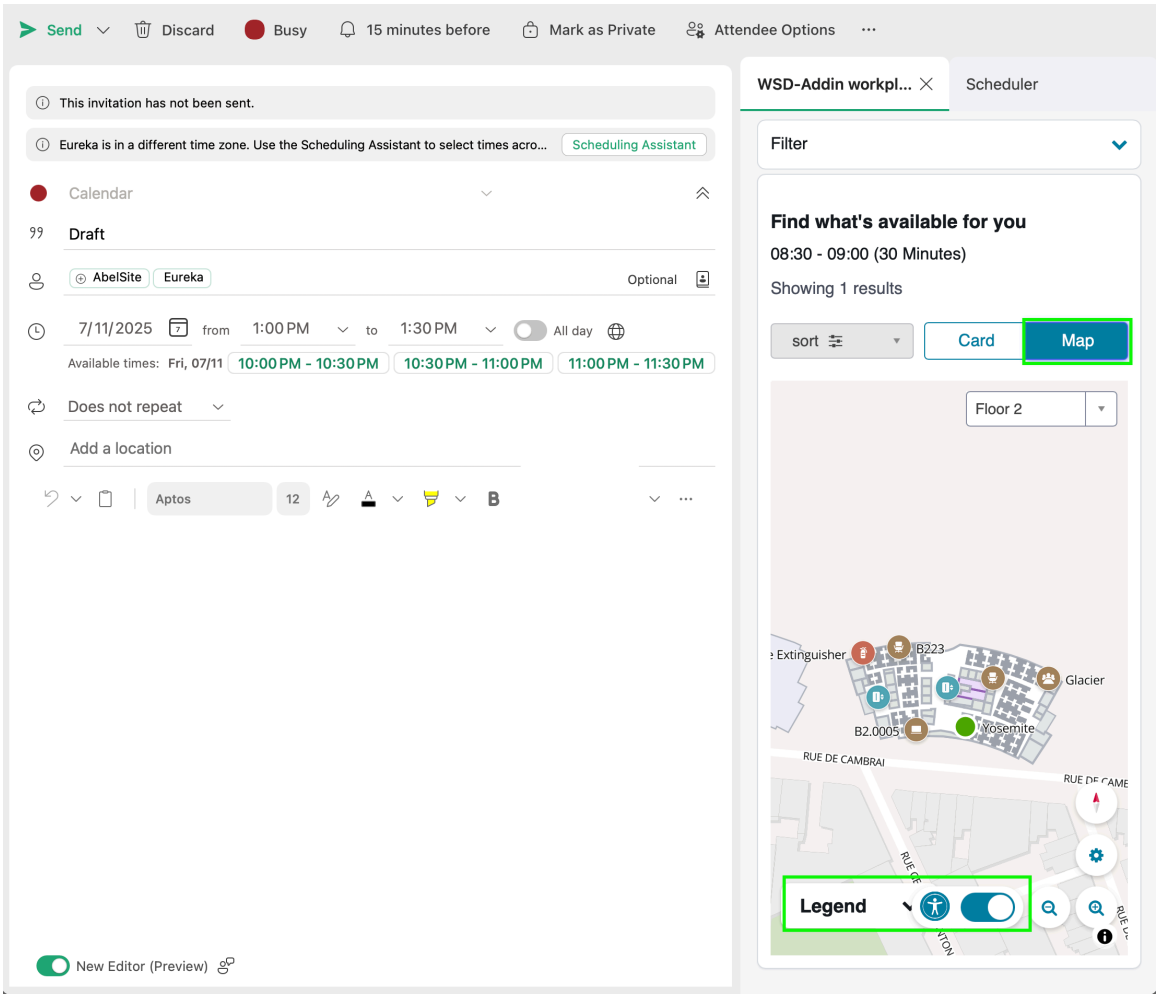
- Legend: Select the toggle radio button to turn on or turn off the **Accessibility patterns**.



10. Select the favorite icon (♡) to favorite a space.
11. Select **Next**.
    A message is displayed if you try to reserve a space on your remote office day. The application gives you an option to update your remote day to in office presence day using the Presence dashboard.

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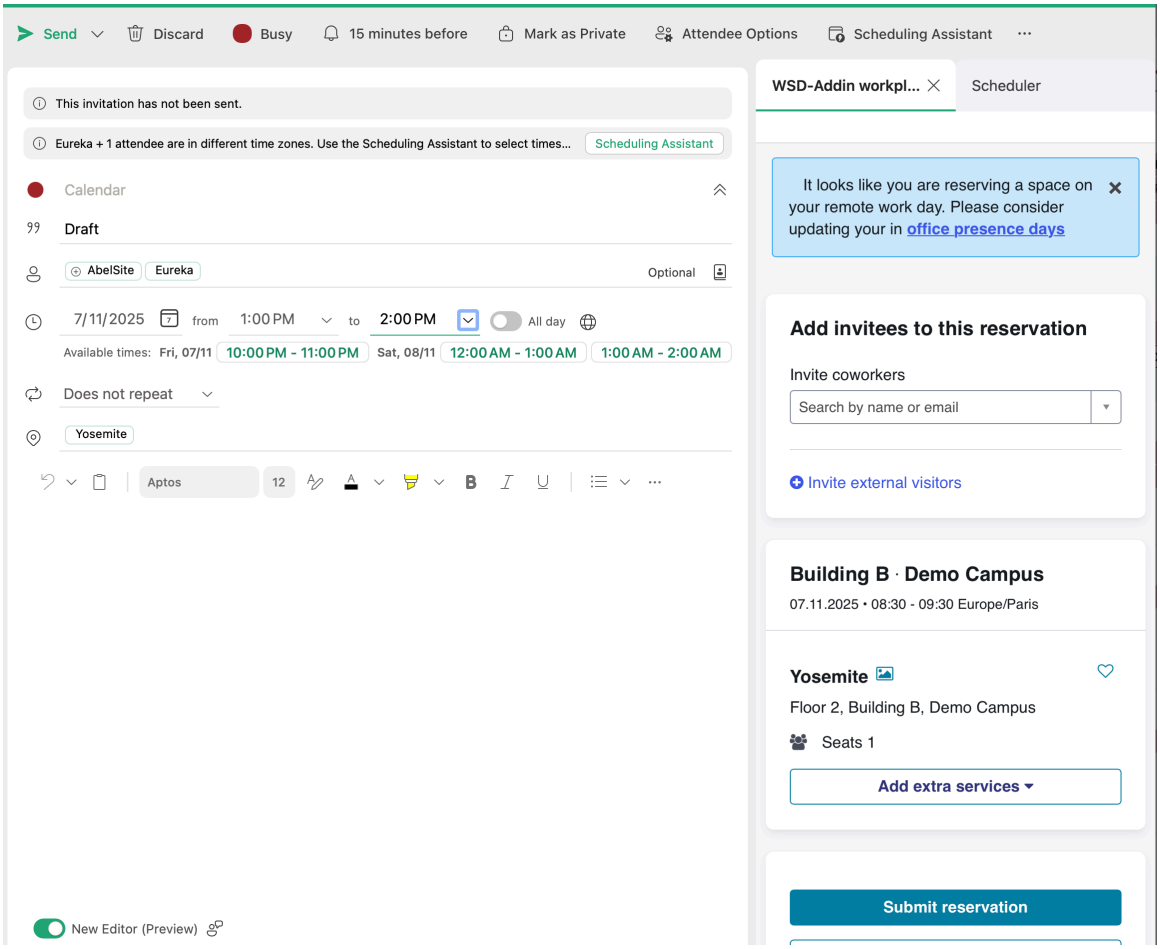

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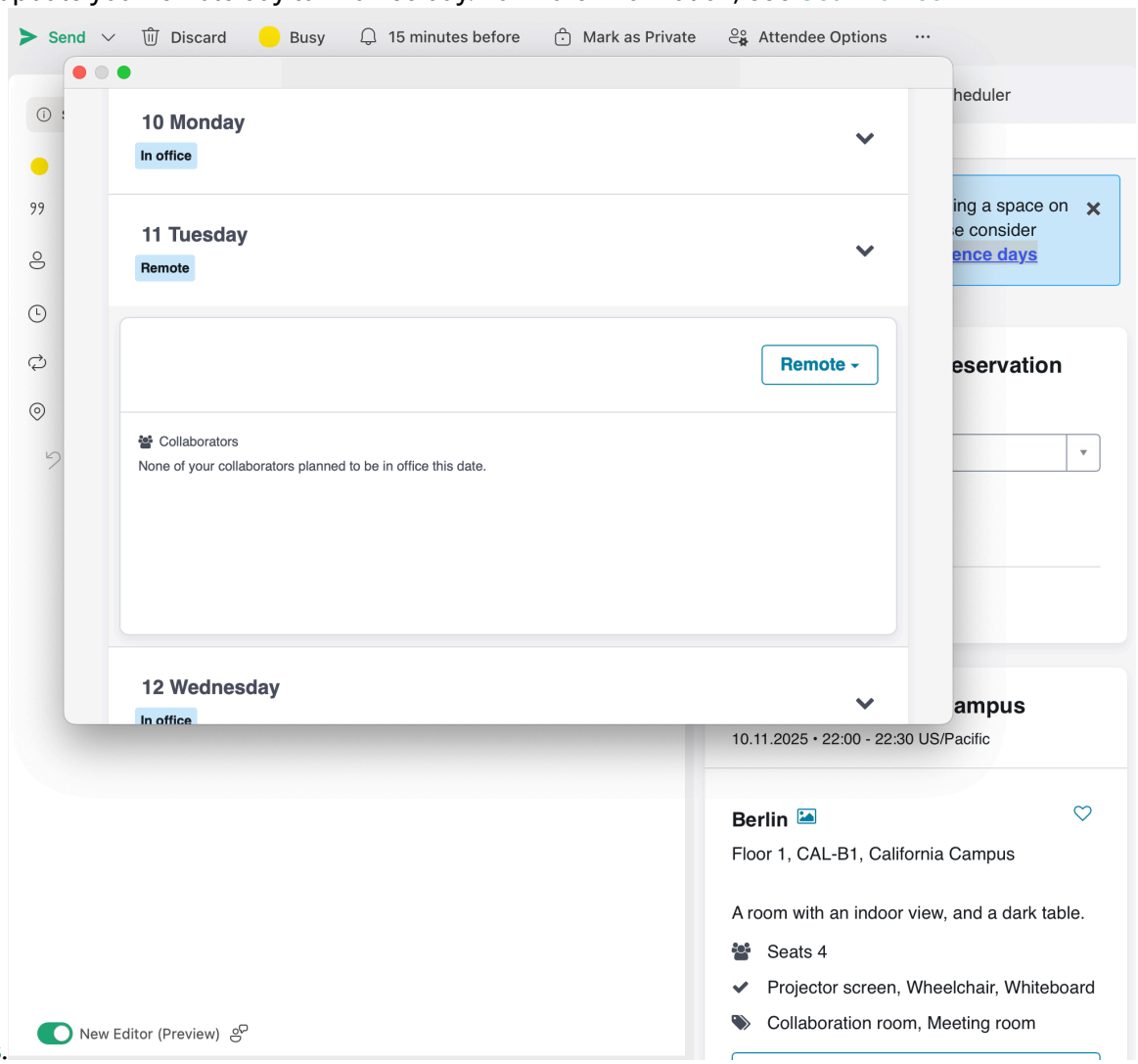
- Select the URL link shown in the message to navigate to the Presence Dashboard and update your remote day to in office day. For more information, see Set in-office days.



Select the **Remote** drop-down list and select **In-office** or **Visit another office** as required.

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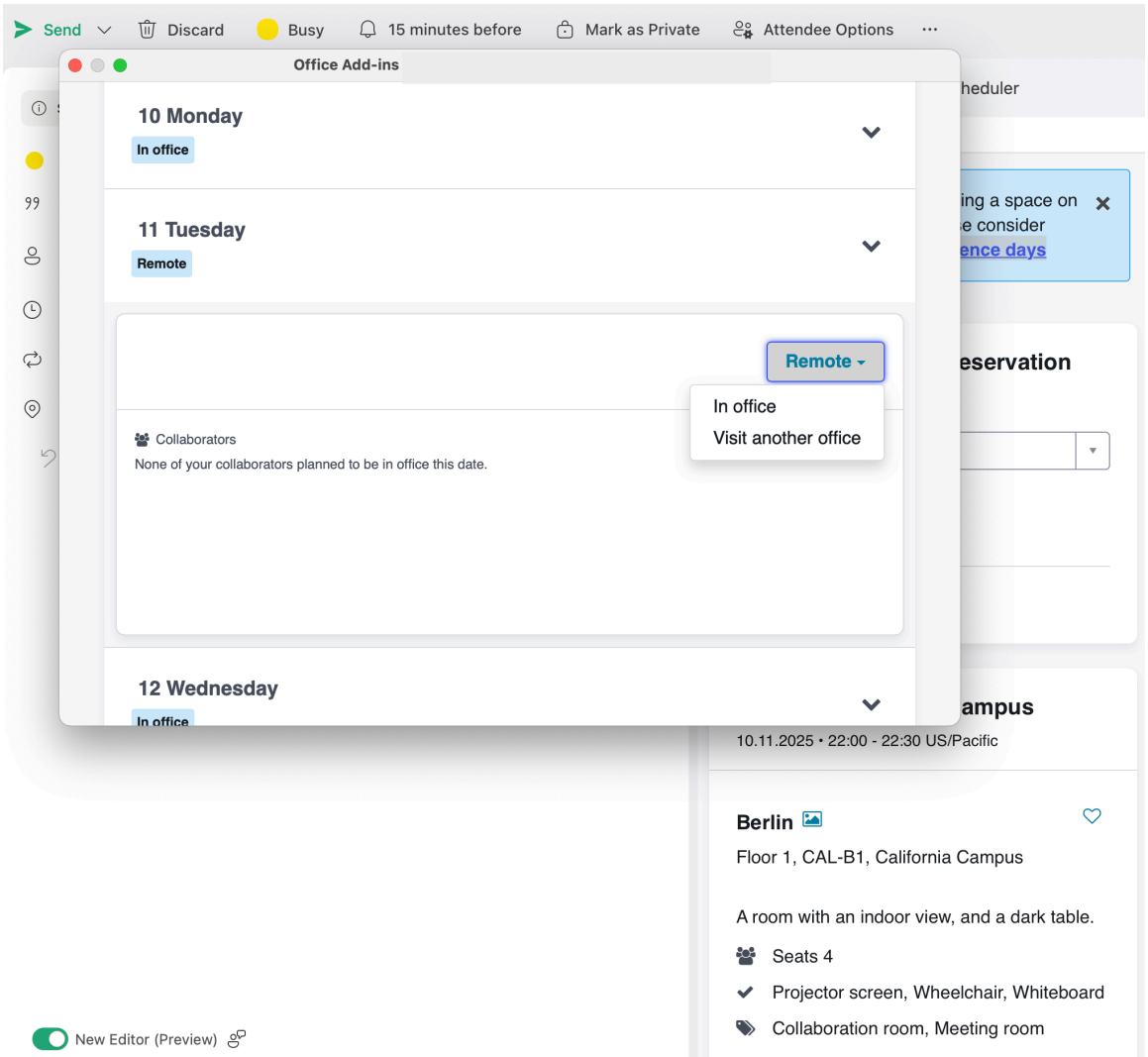

- On the Presence Dashboard, select the **Remote** day for a date that you were making reservation and change it to **In office** or **Visiting another office**.
- Select the **Make Reservation** tab.
- You're redirected to the MOA Reservation Auth login page.
- Select **Allow** to access the Microsoft Outlook web portal.
- Make your reservation.

12. **Optional:** Add invites to your reservation.

> **Note:** You can invite your colleagues in Microsoft Outlook Outlook by using the invite list (Invite attendees" or "Add required people"). If you want to add guests, you need to include the guests to your invite in Microsoft Outlook and register them in Microsoft Outlook Add-in.

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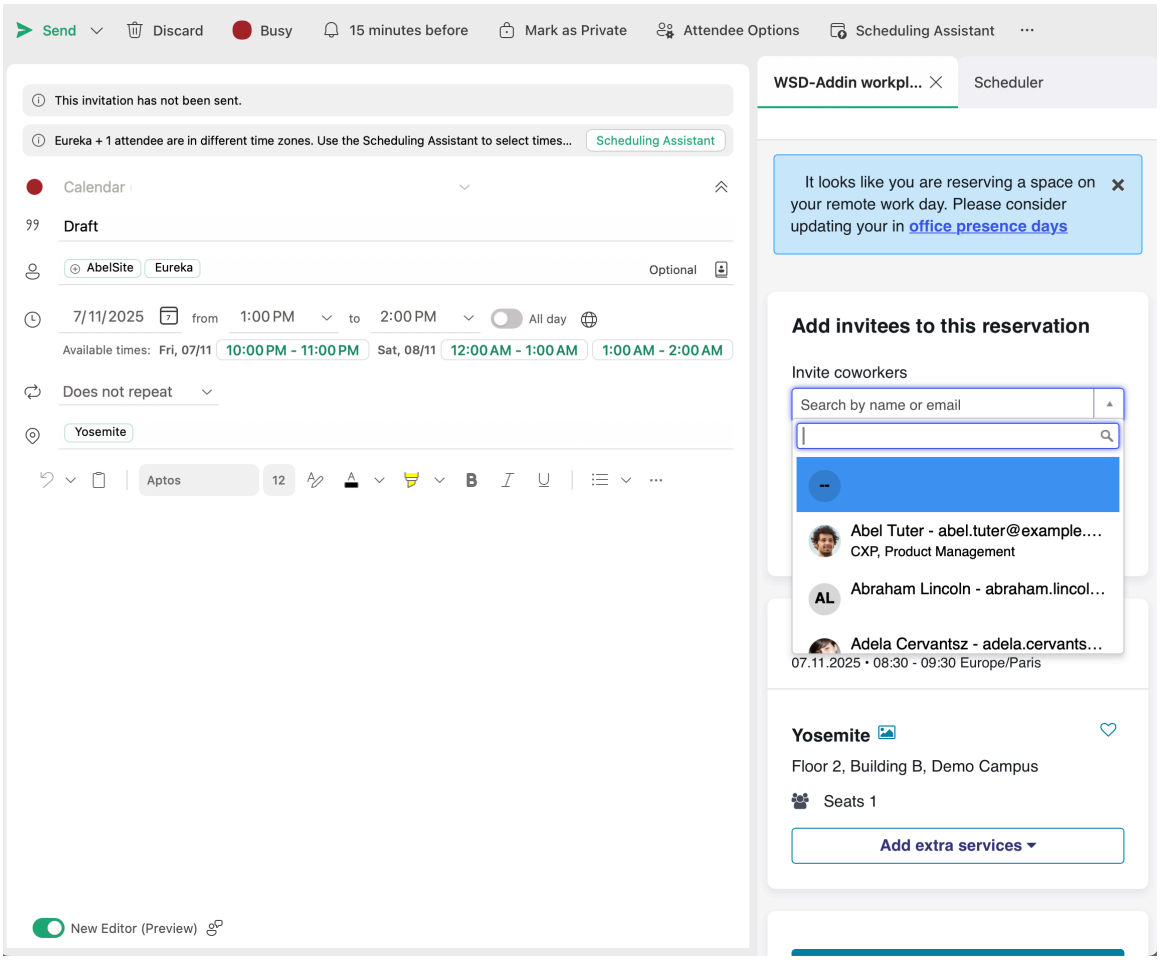

13. Optional: Add external visitors to your reservation.

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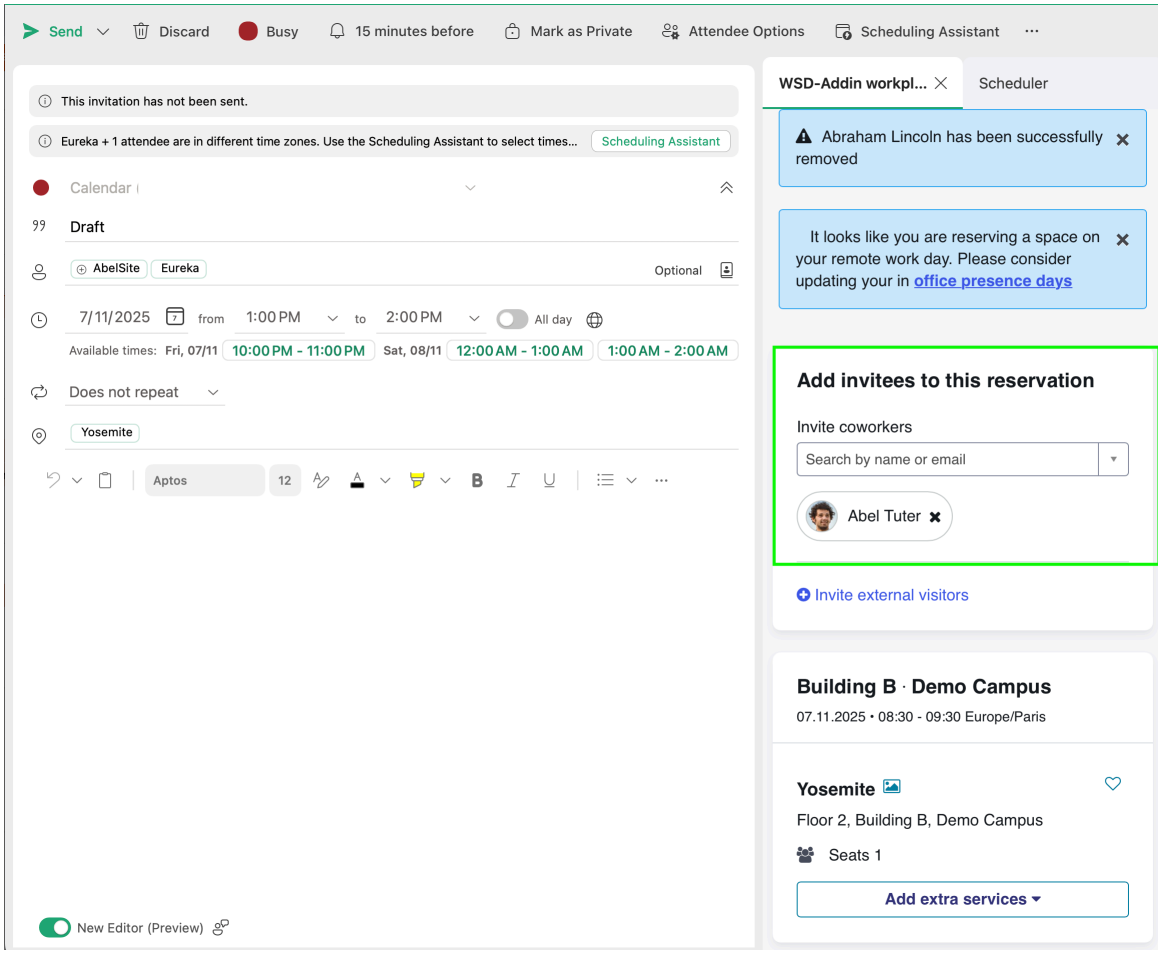

On the form, select one of the following options to add a visitor:

- Previous visitor: Option to select a prior visitor.
- Add a new visitor: Option to add a new visitor.

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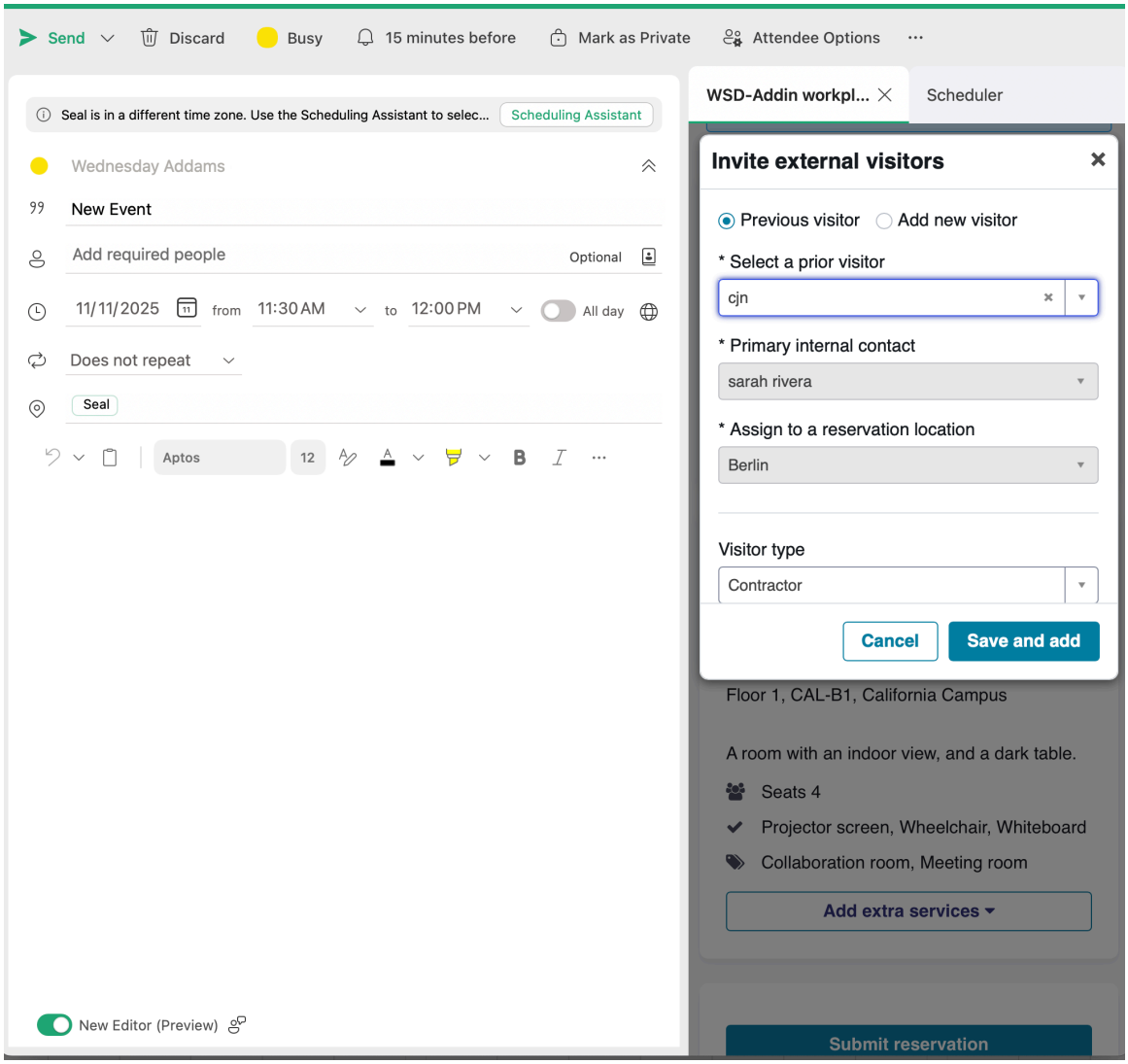

14. Select **Add extra services** drop-down list to add workplace services available for a location.

Edit or remove workplace services as required. For example: Catering, space arrangement, projector, and so on.

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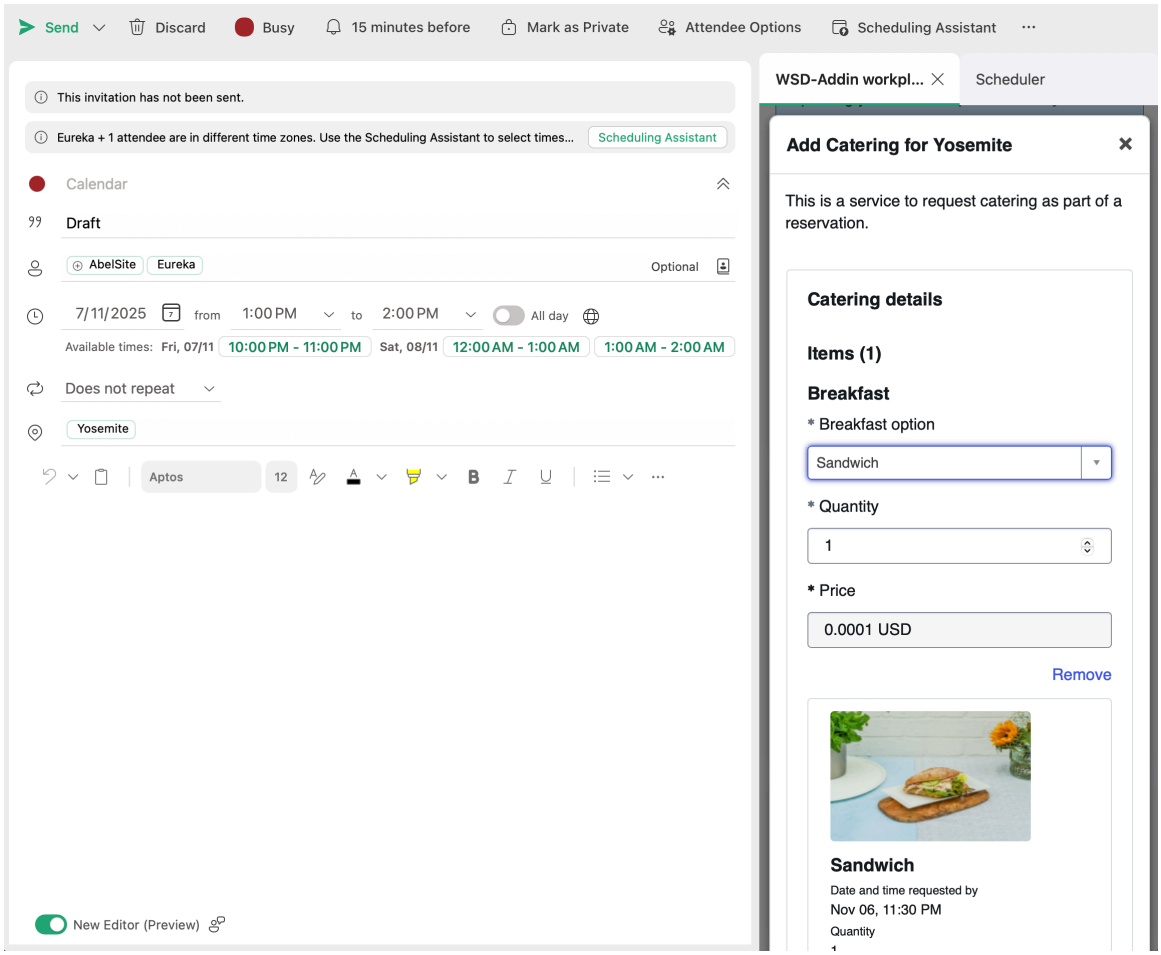

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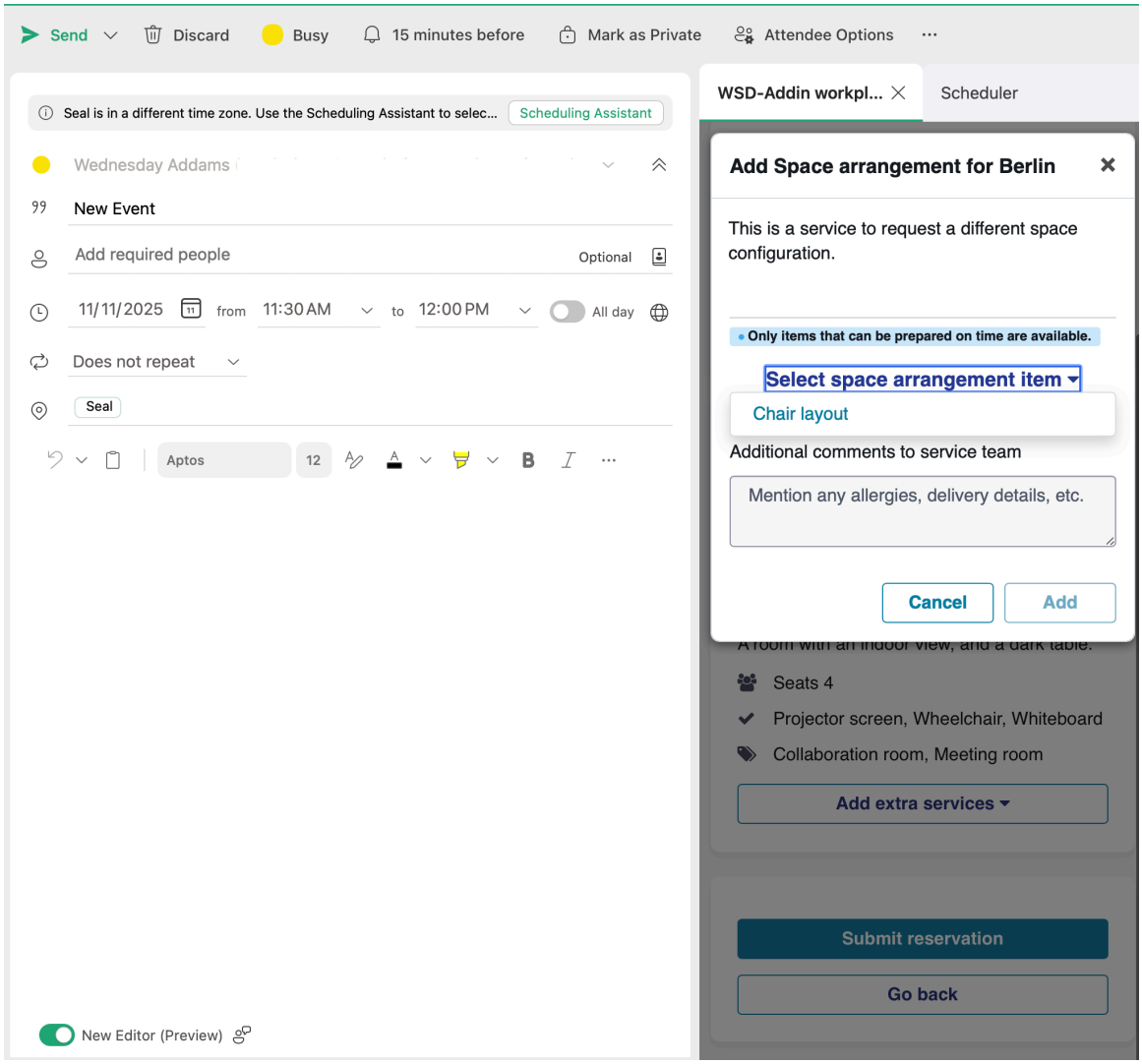

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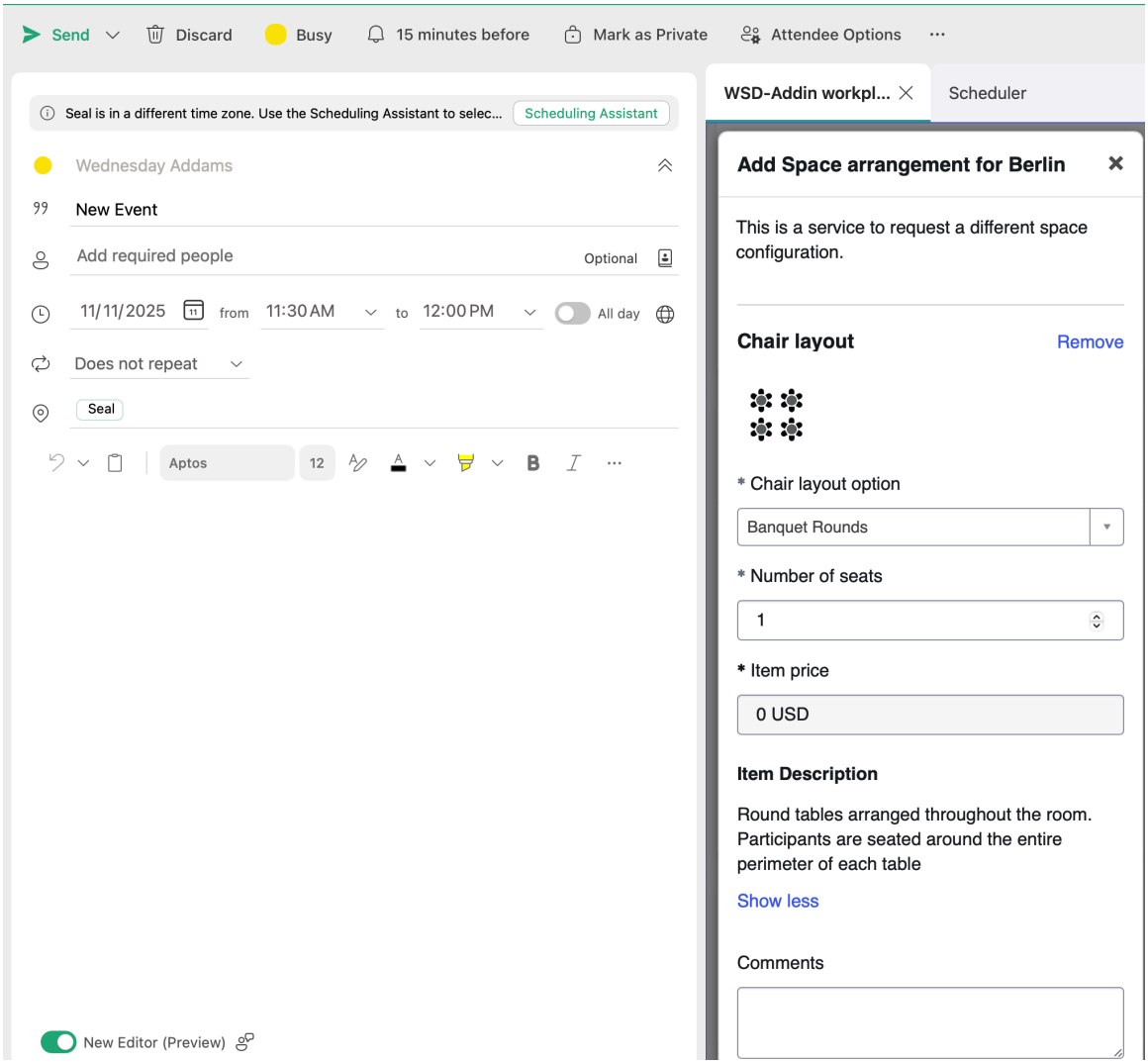

15. Select **Submit Reservation**.

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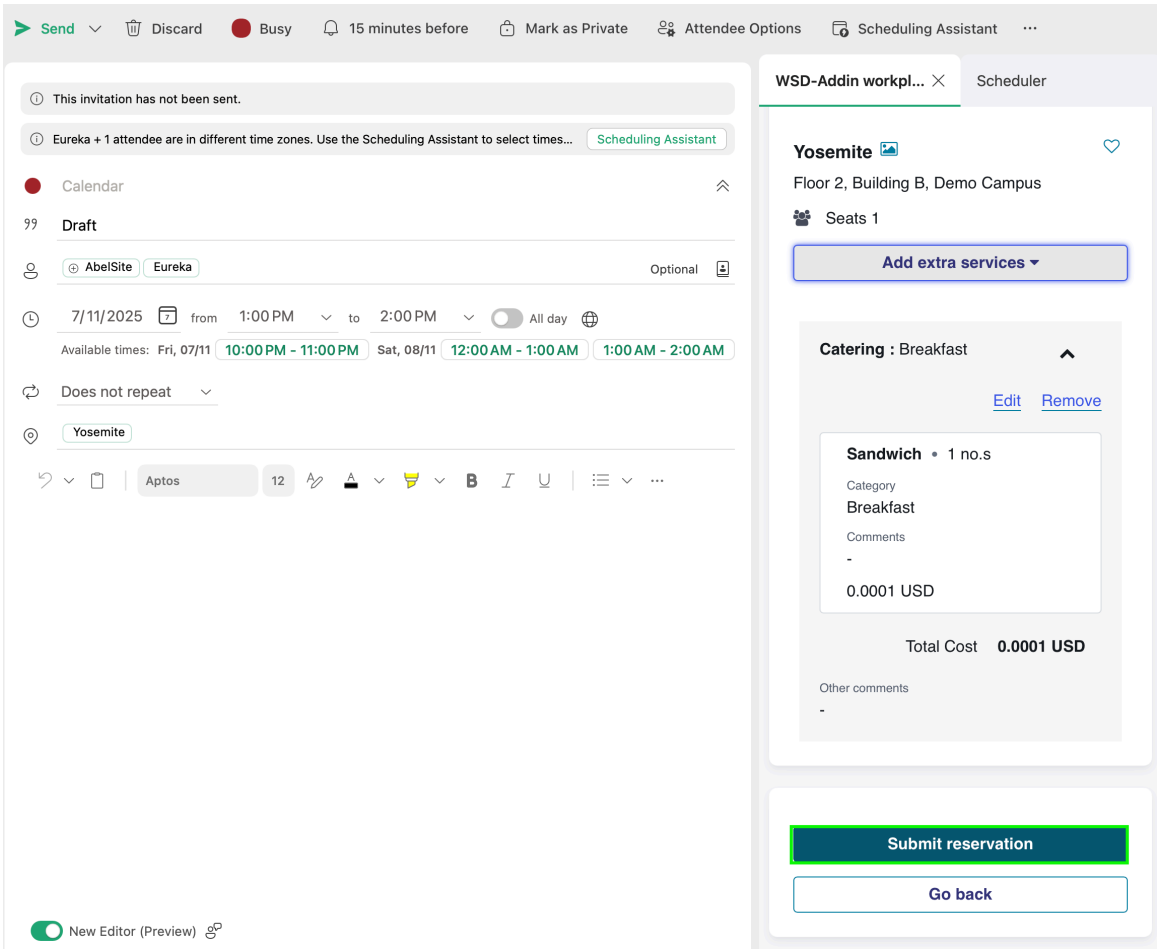

16. The Reservation Summary page is displayed.

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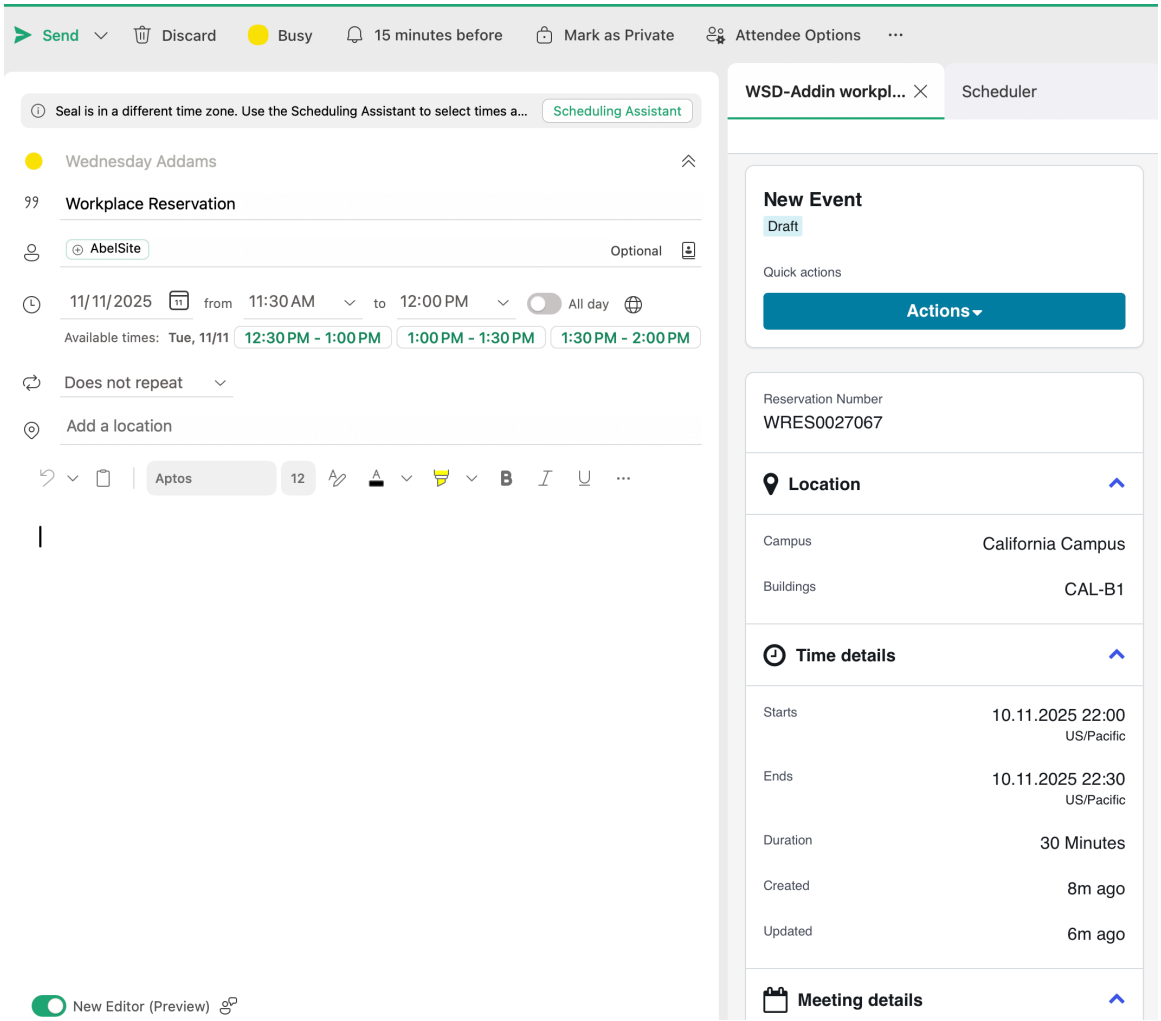

17. Select **Actions** tab and select **Change Reservation details** from the drop-down list to edit or update your reservation.

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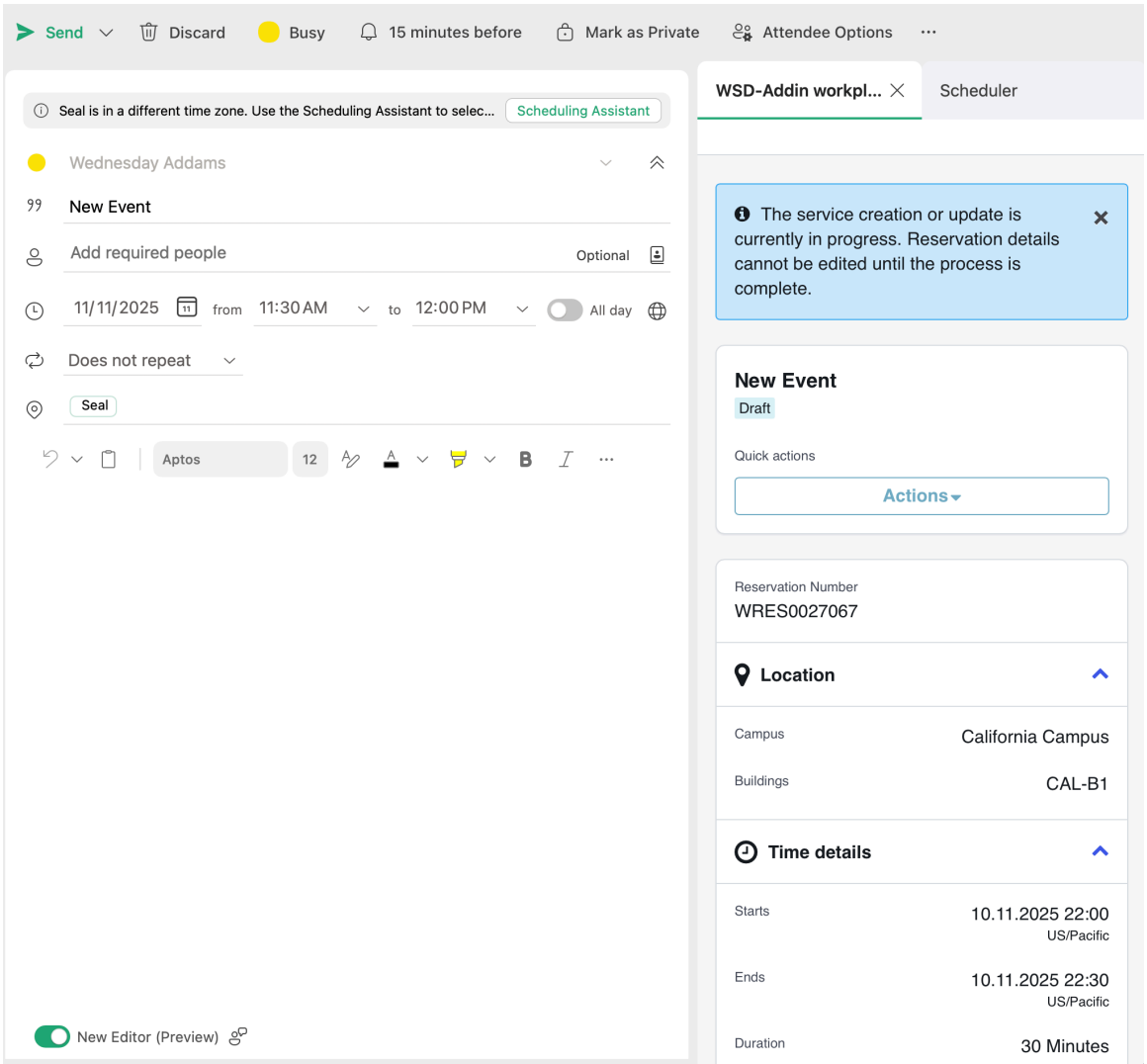

18. Optional: Edit Workplace Services or remove workplaces as required.

(Optional) While editing and updating a reservation to a new location, date, or time, the application shows the missing services message for services that are missing in your new updated location.

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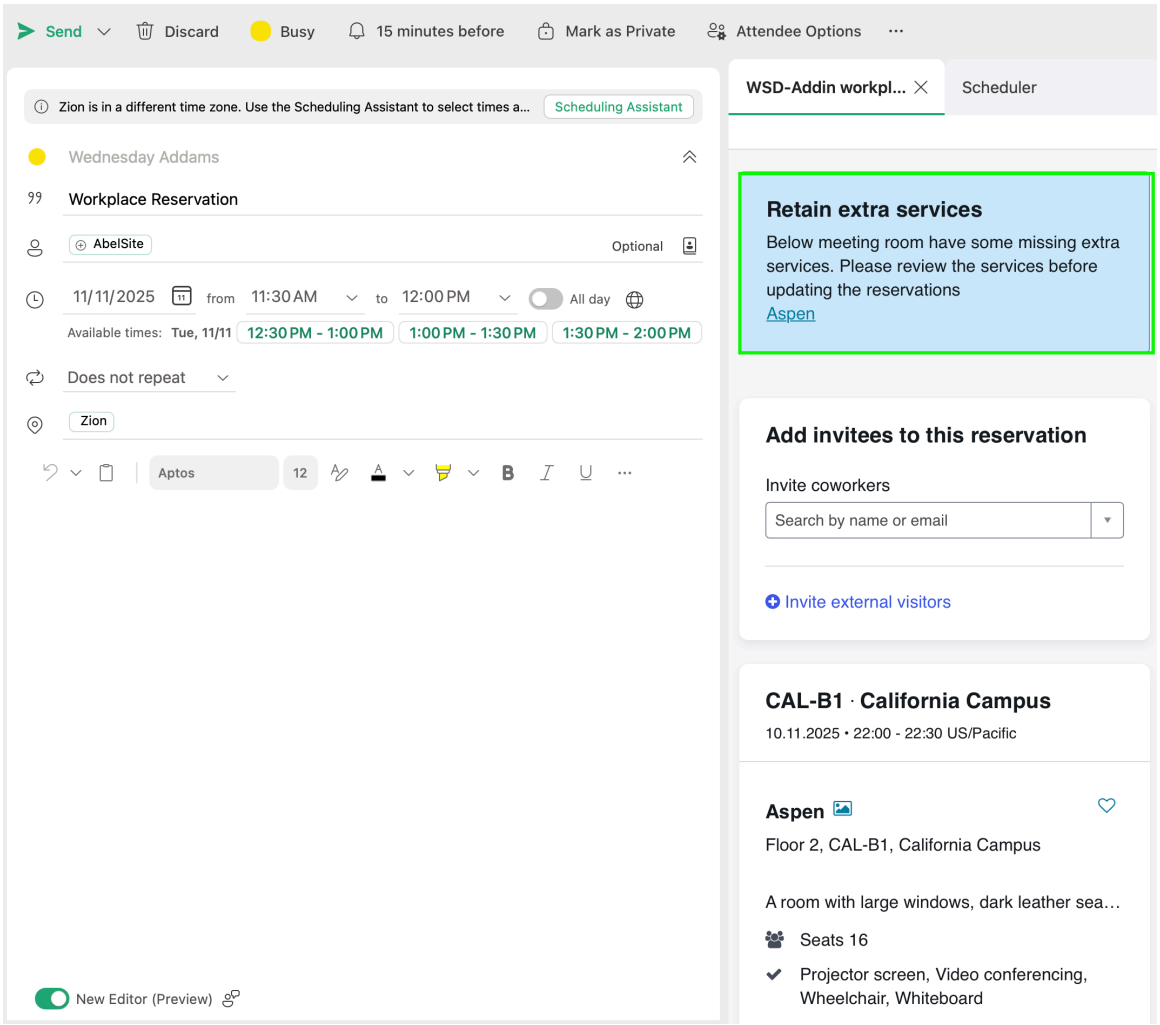

19. **Optional:** Review the services that you want to retain before updating the reservation and select the **Retain Services** tab.

    (Optional) The services are retained from the changed location to the updated location.

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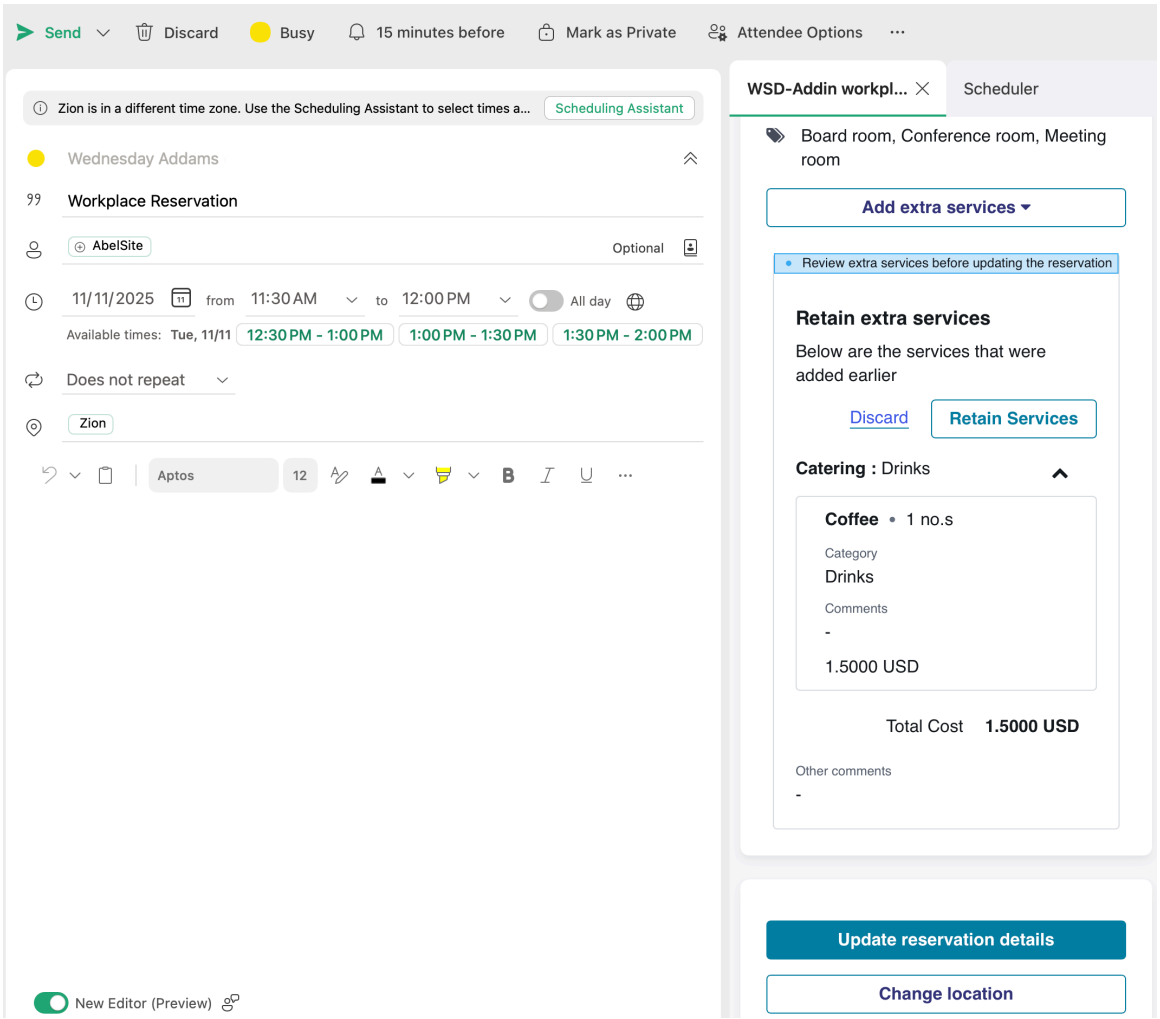

20. Select the **Update reservation details** tab or **Change location** to update changes to your location, date, and time.

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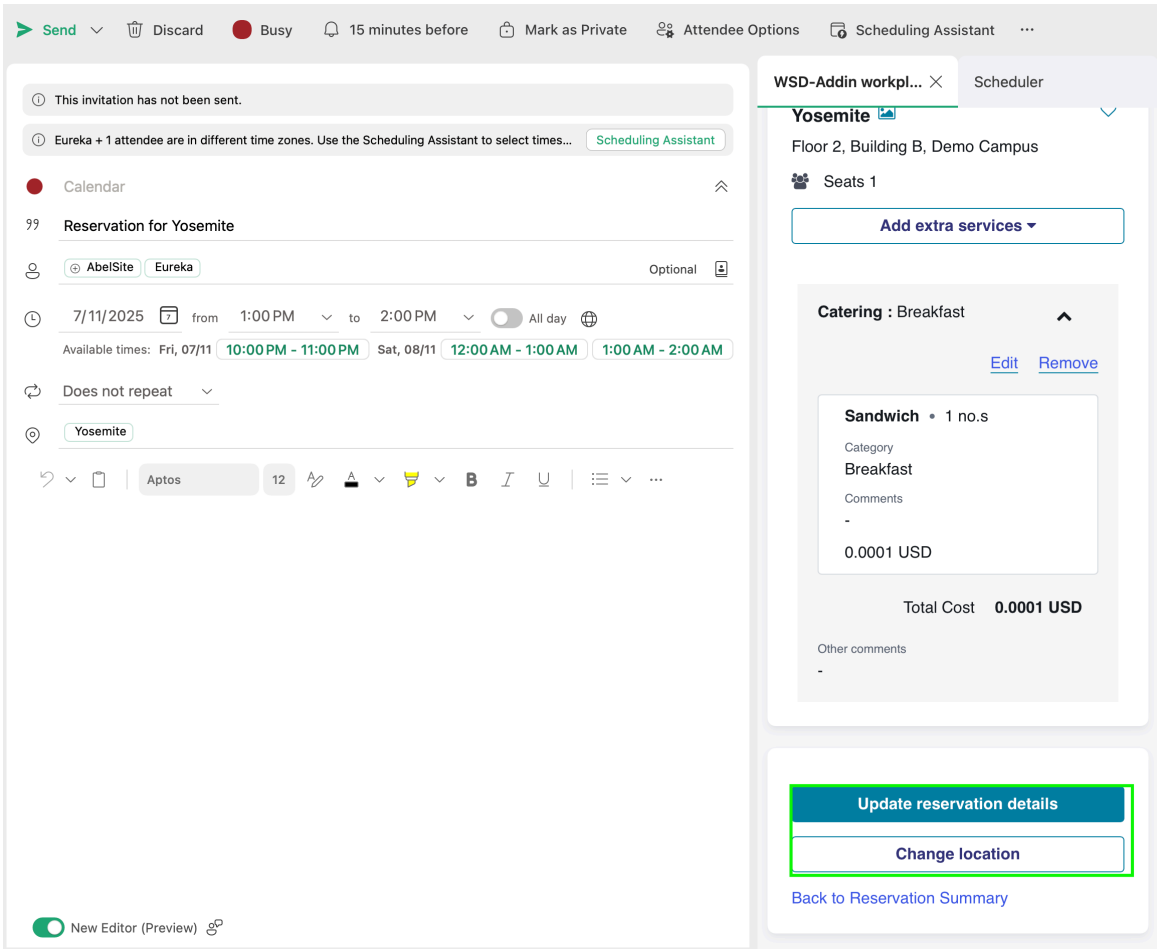

"The service creation or update is currently in progress. Reservation details can't be edited until the process is complete" message is displayed.

21. The updated reservation details are updated in the Reservation Summary page.
22. Select **Send** to send the meeting invite to invitees.

> **Note:** A Meeting invite when created in the Microsoft Outlook is in a **Draft** state. After it is sent to Microsoft Exchange Online, It takes some time for a meeting or reservation request sent from a client server to be synchronized with the Microsoft Exchange Online server. After it is synchronized, the reservation state changes to **Confirmation**.

23. **Optional:** Navigate to **All** > **Workplace Reservation Management** > **All Reservations**.

    (Optional) Select your reservation to review the details on Workplace Reservation Management.

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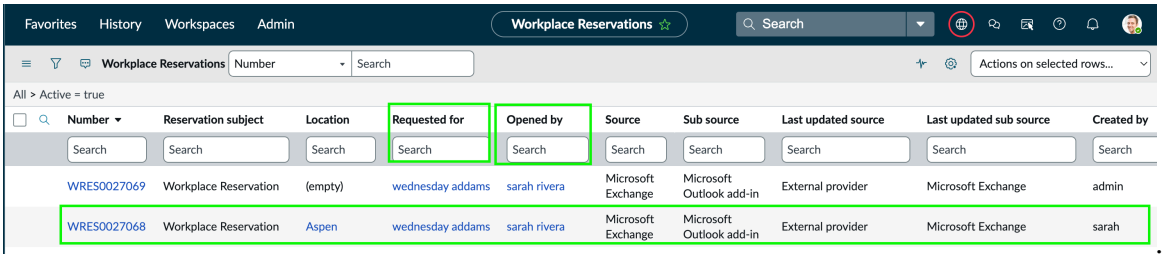
If you have delegated access to a team member to create a reservation on your behalf, the All Reservations page shows the reservation details along with updated **Requested for** and **Opened by** column values.



For more information, see Delegate reservations in Microsoft Outlook add-in.

Edit reservation details in Microsoft Outlook

Edit or update your workplace reservation using Microsoft Outlook Add-in.

Before you begin

Role required: admin

Procedure

1. Create and submit a workplace reservation.
   For more information, see Create a reservation in Microsoft Outlook add-in.
2. Select the **Actions** tab from the Reservation Summary page to edit the location, date, time, and workplace services within your reservation.

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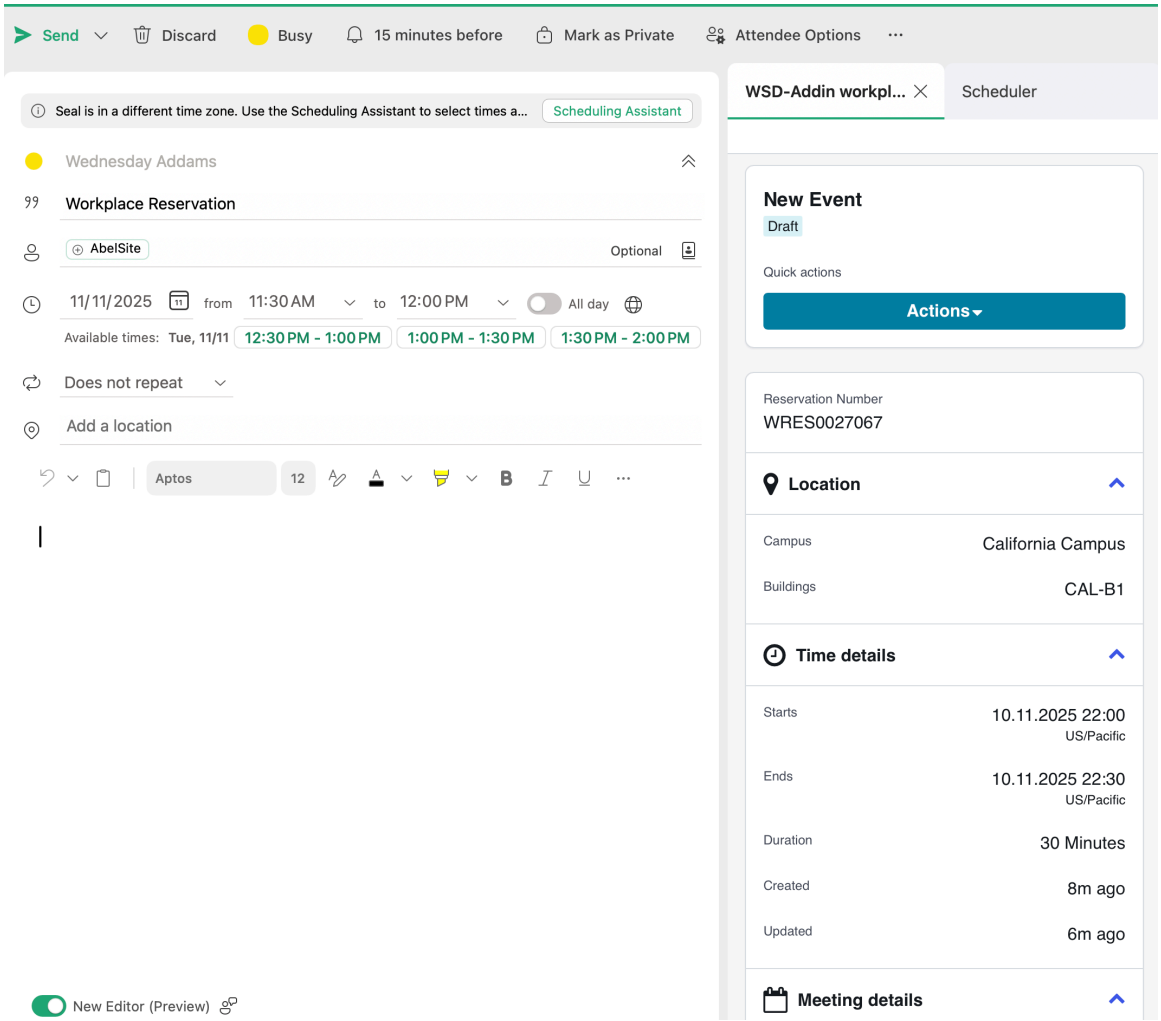

3. Select **Change Reservation details** from the drop-down list to edit or update your reservation.

   To change or update the reservation location (Campus, building, floor, or space), select **Change Location**.

   If the workplace service creation or update is in progress, a message is displayed to show that reservation can't be edited until the process is complete.

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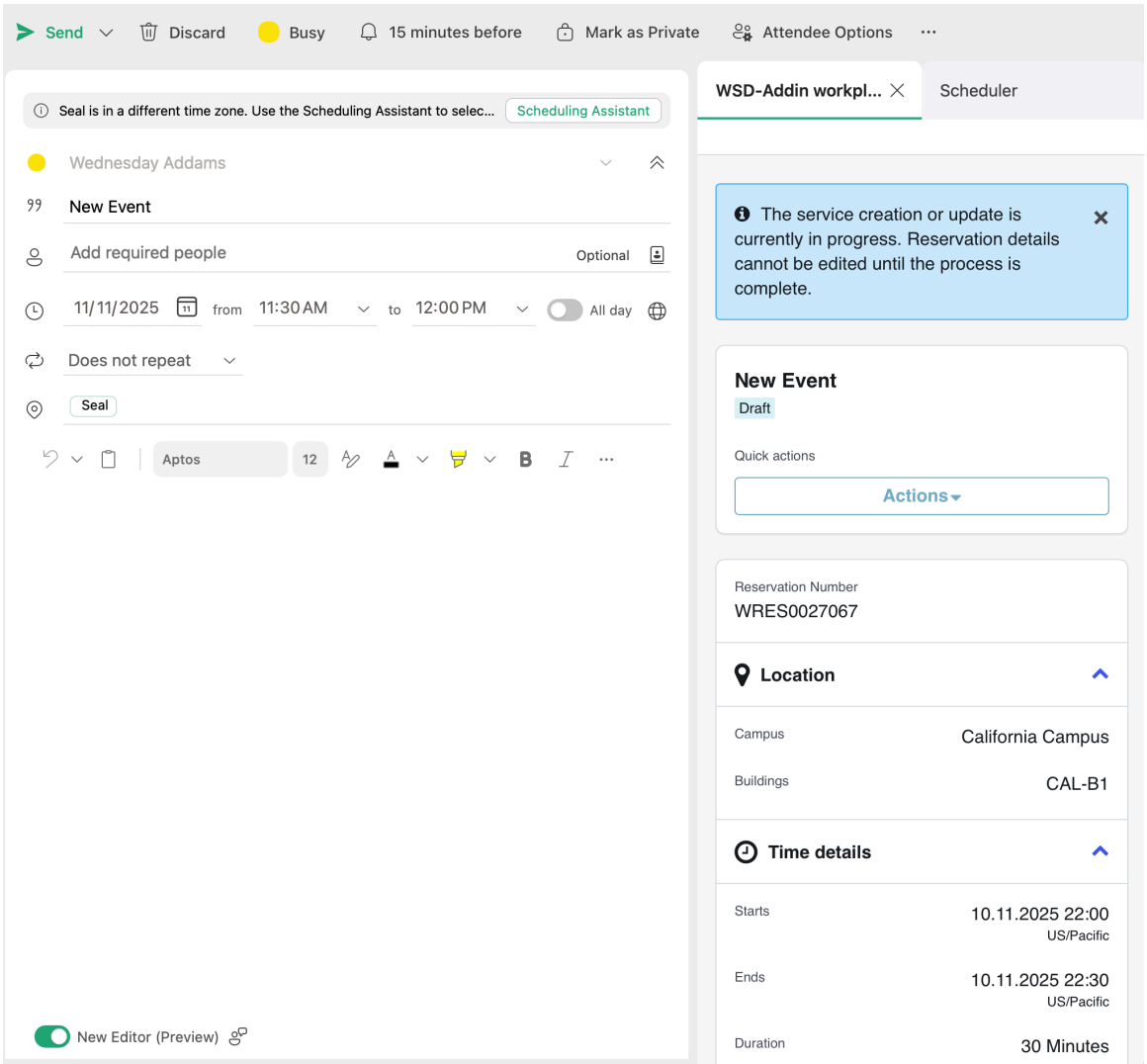

4. **Optional:** Edit Workplace Services or remove workplaces as required.

   (Optional) While editing and updating a reservation to a new location, date, or time, the application shows services that aren't available for selection in an updated location.

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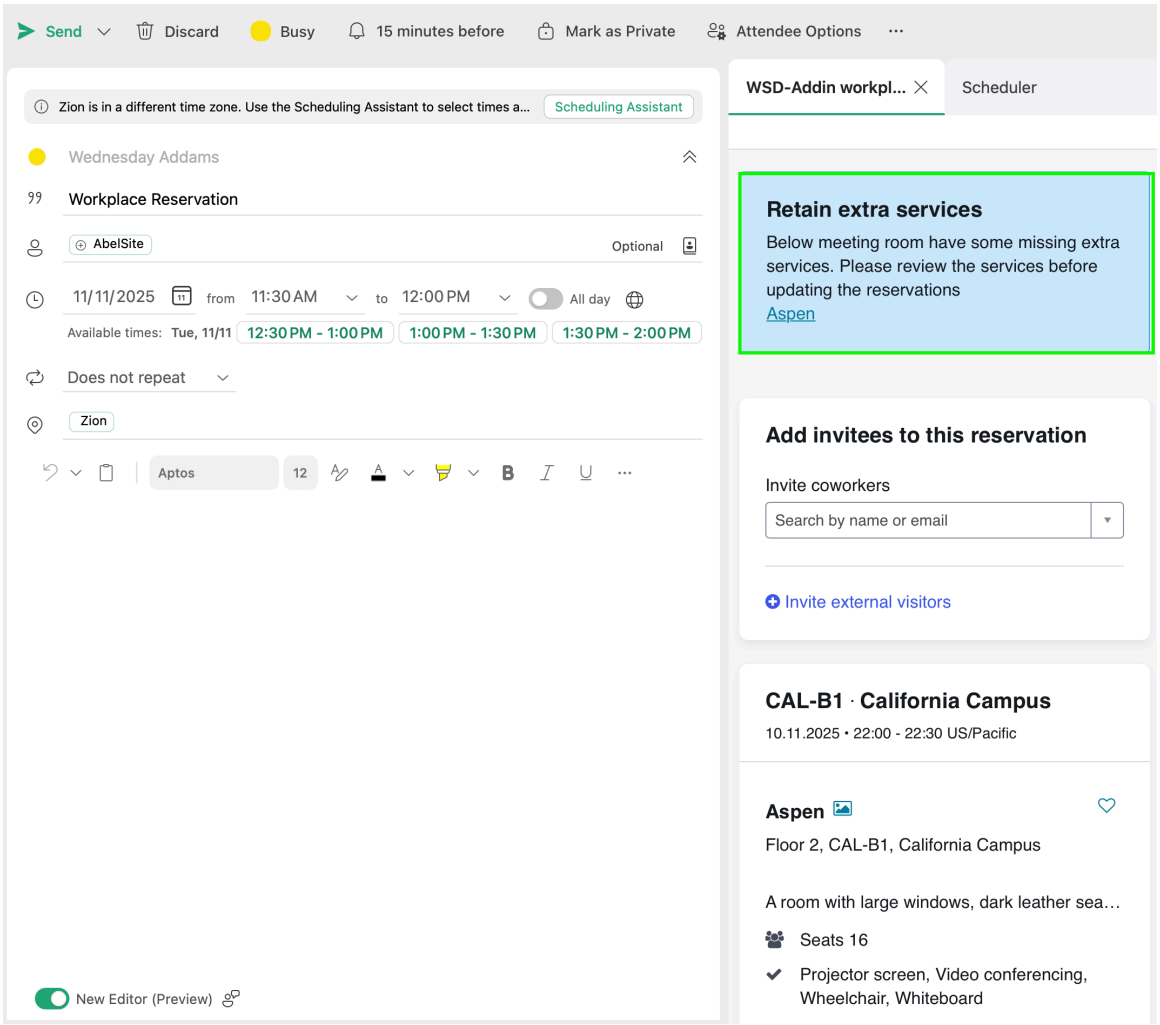

5. **Optional:** Review the workplace services that you want to retain before updating the reservation and select the **Retain Services** tab.

   (Optional) The services are retained from the changed location to the updated location.

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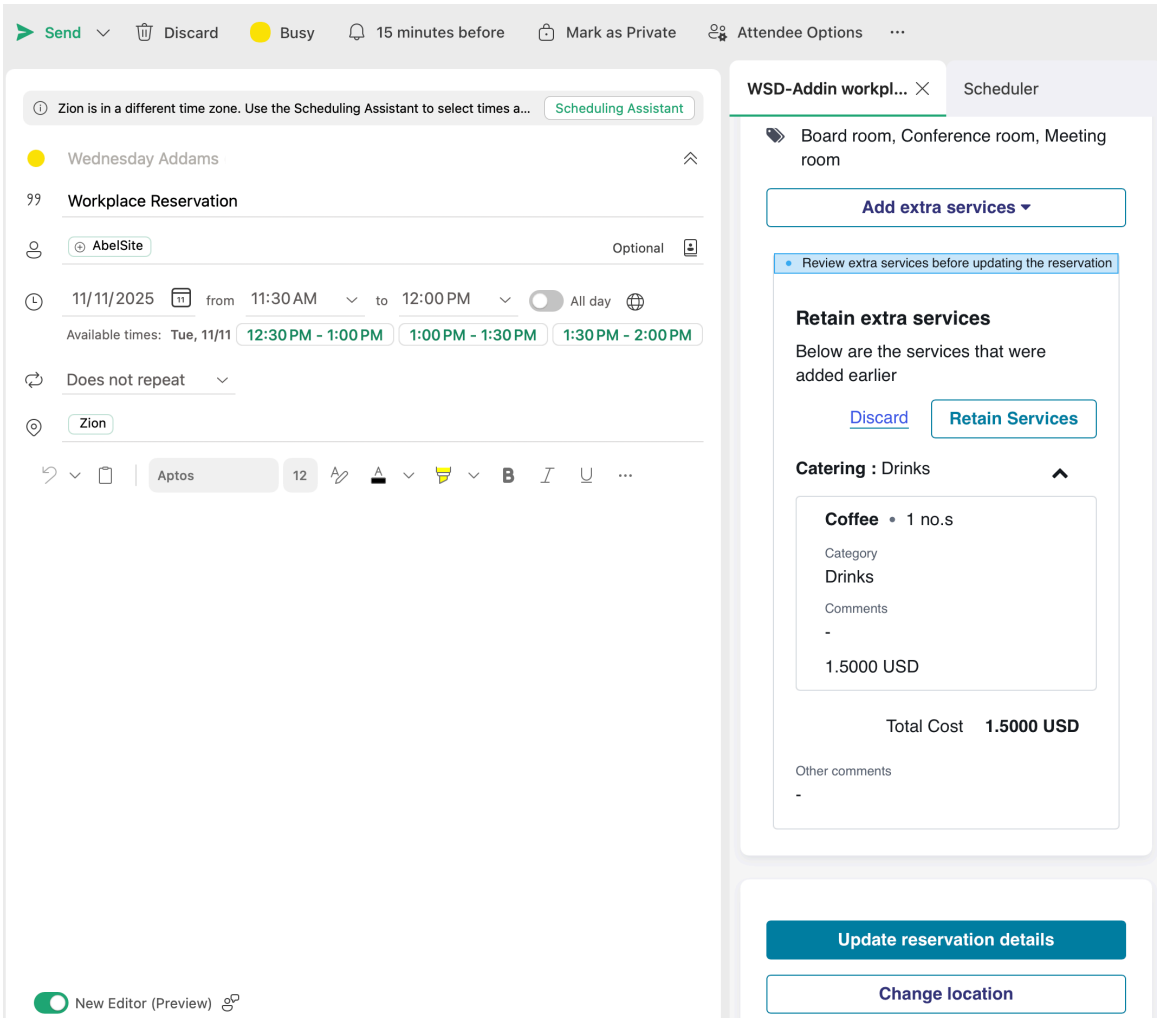

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6. Select the **Update reservation details** tab or **Change location** to update changes to your location, date, and time.

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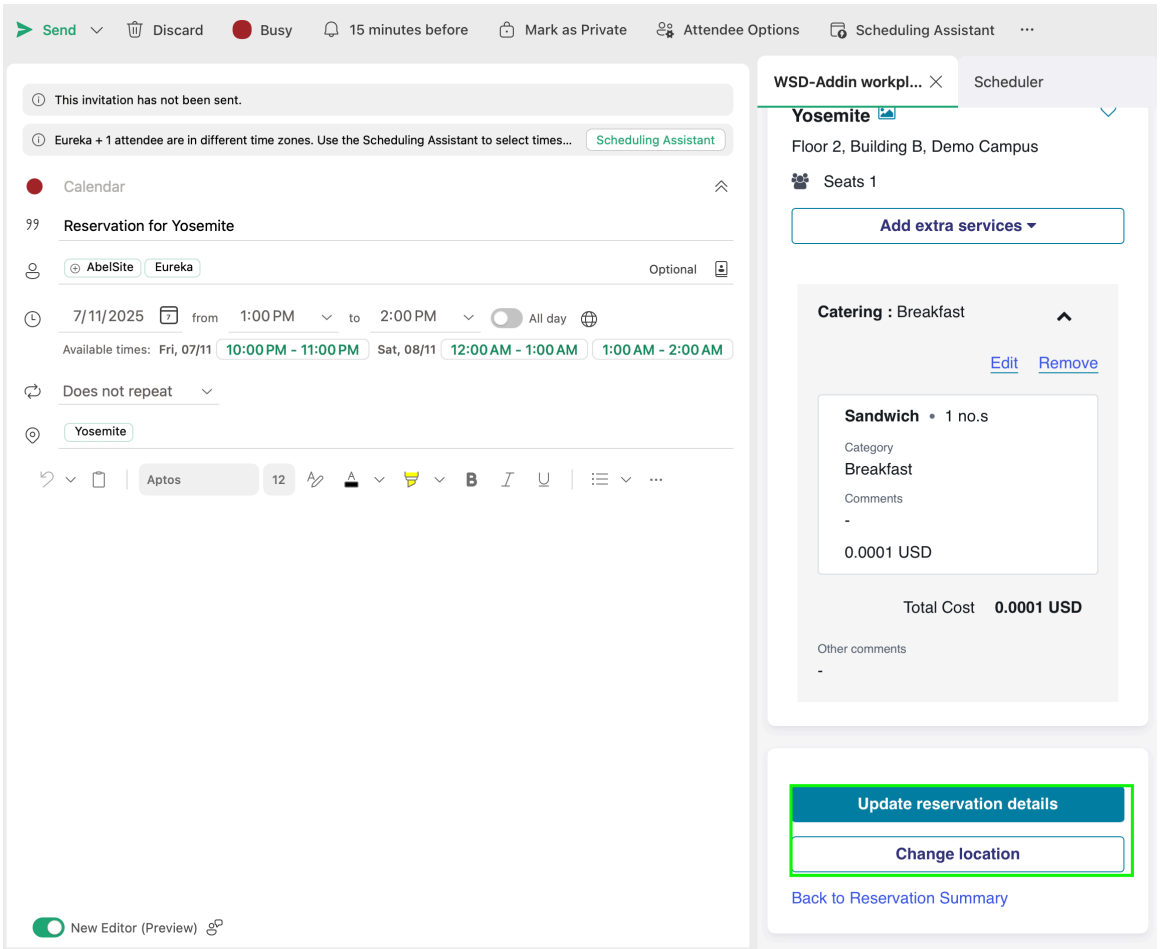

7. Review the Reservation Summary page for the updated reservation details.
8. **Optional:** Navigate to **All** > **Workplace Reservation Management** > **All Reservations**.

   (Optional) Select your reservation to review the details on Workplace Reservation Management.

Delegate reservations in Microsoft Outlook add-in

Delegate additional permissions to read, create, or change items in your Microsoft Outlook mailbox. Delegate access to a colleague or team member. Delegates can create and reserve resources (desks, rooms, equipment, services like catering) for other employees.

Before you begin

When you grant a delegate access, you can determine the level of access that the delegate has to your calendar or mail folders. You can grant a delegate permission to read items in your folders or permission to read, create, change, and delete items.

Role required: admin

Procedure

1. Open the Microsoft Outlook application.
2. Select the **Calendar** > **People's calendar** to select a team member's calendar to who you want to delegate access to your calendar.
   For example: Select Wednesday Addams' calendar. Here, Sarah Rivera is the meeting organizer who has provided Wednesday Addams the delegation rights to Sarah's calendar.

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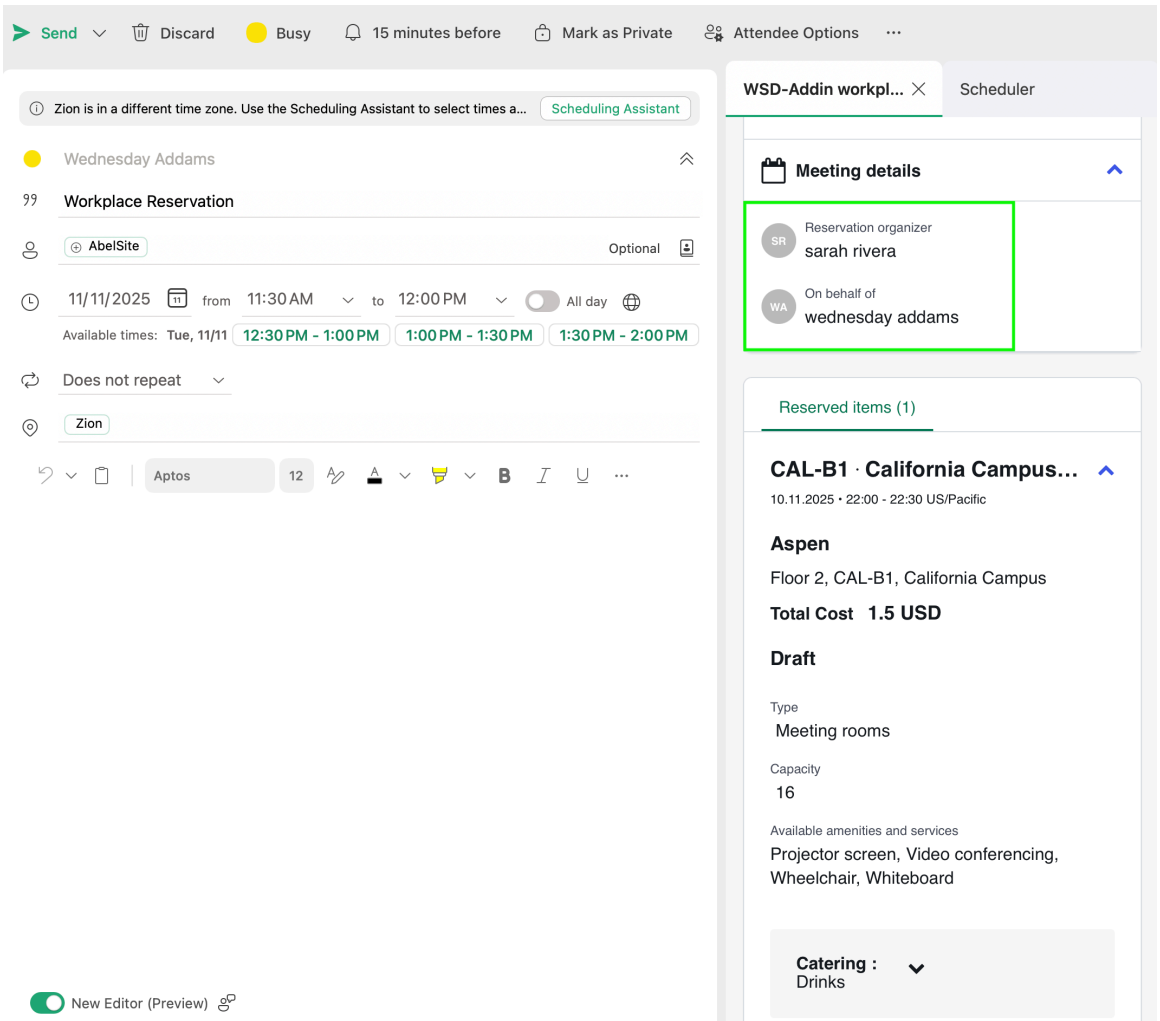
3. Select a date on the calendar, select and hold (or right-click) to select **New event**.
   You can also select a date and double-click to open the New Event calendar invite form.
4. On the New Event form, fill in the required information.
   For more information, see Create a reservation in Microsoft Outlook add-in.
5. Select the add-in manifest file of your instance and create a reservation using the Make a reservation form.
   For more information, see Create a reservation in Microsoft Outlook add-in.
6. Review your reservation in the Reservation Summary page.



7. Select **Send** to send the meeting invite.

> **Note:** An event or meeting invite when it's initially created in Microsoft Outlook is in a **Draft** state. When the meeting invite is sent, it is sent to the Microsoft Exchange Online server. It takes some time for a meeting or reservation request sent from the client server to be synchronized with the Microsoft Exchange Online server. After synchronization, the reservation changes to **Confirmation** state.

8. **Optional:** Navigate to **All** > **Workplace Reservation Management** > **All Reservations**.

   (Optional) Select your reservation to review the details on Workplace Reservation Management.

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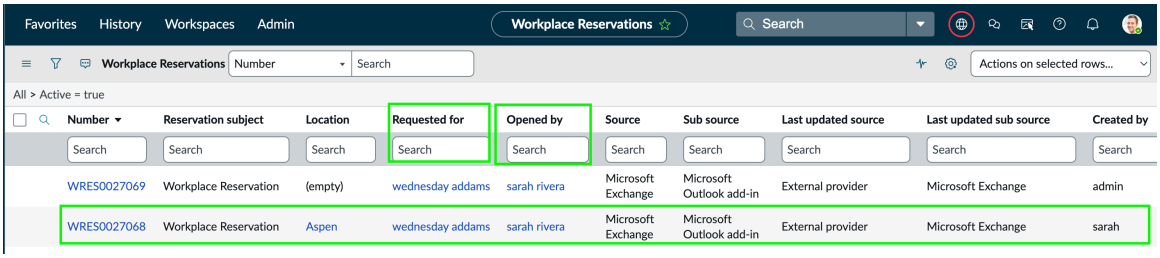


Analytics and Reporting Solutions for Workplace Reservation Management

Monitor the status of reservations made in your organization.

Reservation Management dashboard

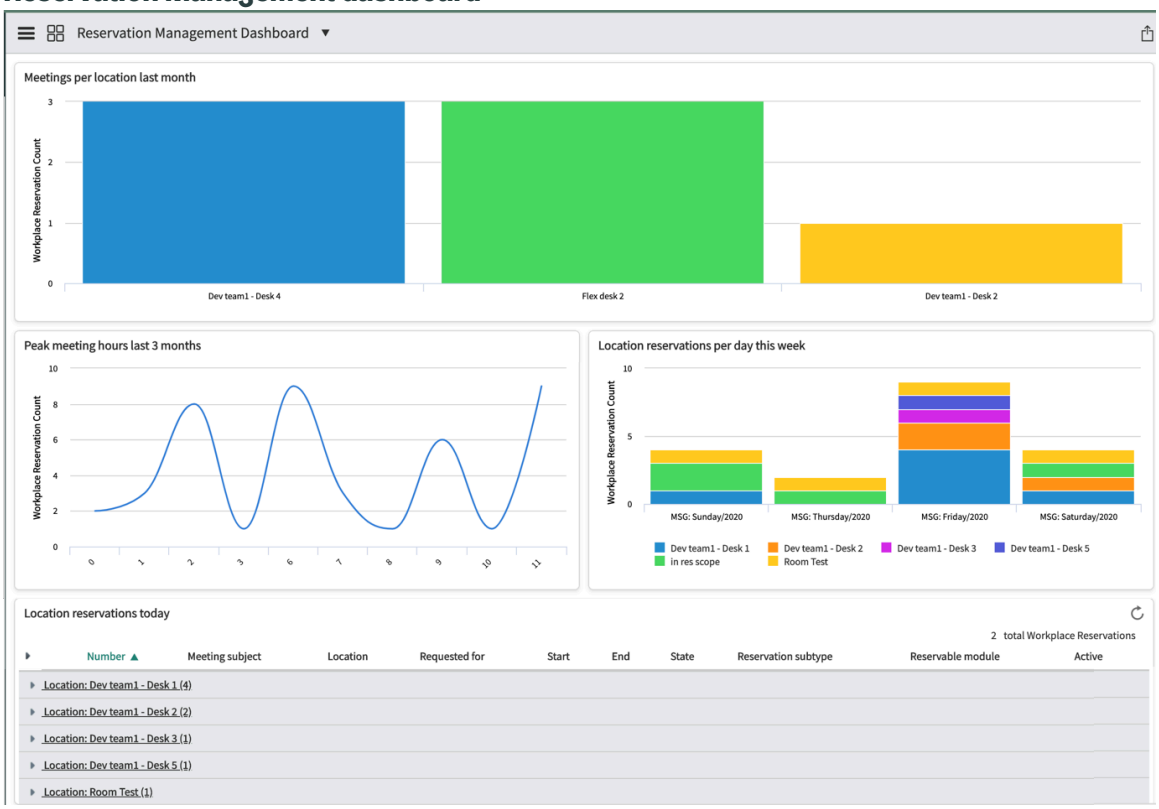
Use the Reservation Management dashboard to monitor the reservations and meeting frequency in your organization. On any day, you can view details such as number of reservations, peak meeting times, and number of meetings for different locations.

Note: The Workplace Reservation Management dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central.

Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

For more information about the migrated dashboard, see Reservation Management dashboard.

Reservation Management dashboard



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To access the Reservation Management Dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards**.

End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace manager: Needs visibility into the real-time status and number of the reservations, most reserved locations, peak timings for meetings, and current day's reservations.	sn_wsd_rsv.manager	• Review current day's reservations • Monitor reservations created by employees • Monitor peak time when maximum meetings are organized • Monitor the number of meetings for each location

Data visualizations

Data visualizations

Title	Type	Description
Meetings per location last month	Column	Number of meetings scheduled in each location in the last month.
Peak meeting hours last 3 months	Line	Peak hours when the maximum number of meetings were scheduled in the last 3 months.
Location reservations per day this week	Stacked columns	Number of reservations made each day for the current week.
Location reservations today	List	Number of reservations scheduled for today grouped by location.

Workplace Reservation Management references

Learn more about the role, tables and system properties installed with the Workplace Reservation Management application.

Components installed with Workplace Reservation Management

Several types of components are installed with activation of the Workplace Reservation Management application, including tables, user roles, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this application.

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Roles installed with Workplace Reservation Management

Roles installed with Workplace Reservation Management

Role title [name]	Description	Contains roles
WSD Core Admin [sn_wsd_core.admin]	Complete access to Workplace Service Delivery applications.	sn_wsd_rsv.admin
WSD Admin [sn_wsd_rsv.admin]	• Manage Standard services and the location to which they are assigned. • Add standard services. • Add flexible services • Add reservable purposes. • Assign archiving rule. • Create and assign time slots to a reservable module.	• sn_wsd_rsv.manager • sn_wsd_rsv.dispatcher • sn_wsd_rsv.staff • sn_wsd_core.workplace_user • sn_wsd_rsv.reservation_planner
WSD Manager [sn_wsd_rsv.manager]	• View all reservations. • View and generate reports. • Manage reservations.	• sn_wsd_rsv.dispatcher • sn_wsd_rsv.staff • sn_wsd_core.workplace_user • sn_wsd_rsv.reservation_planner
WSD Dispatcher [sn_wsd_rsv.dispatcher]	View all reservations.	• sn_wsd_rsv.staff • sn_wsd_core.workplace_user
WSD Staff	View all reservations.	sn_wsd_core.workplace_user

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Roles installed with Workplace Reservation Management (continued)

Role title [name]	Description	Contains roles
[sn_wsd_rsv.staff]		
Workplace user [sn_wsd_core.workplace_user]	• Create room or desk reservations from the Service Portal for self or on behalf of someone. • View reservations created by them. • View reservations created on behalf of themselves or someone else. • Manage (edit and cancel) reservations created by them. • View private subject of their reservations or reservation created for them. • View reservable items. • View services.	None
Reservation planner [sn_wsd_rsv.reservation_planner]	Plan reservations in Workplace Central Event planner	• sn_wsd_rsv.dispatcher • sn_wsd_rsv.reservation_viewer • sn_wsd_case.bypass_services_limitation

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Roles installed with Workplace Reservation Management (continued)

Role title [name]	Description	Contains roles
		Reservation planner and space planners are allowed to ignore or bypass the Reservable module configuration settings. For more information, see Allow Event planners to handle reservations with more flexibility. • sn_wsd_rsv.bypass_module_validation
Reservation viewer [sn_wsd_rsv.reservation_viewer]	View reservations inWorkplace Central Event planner.	• sn_wsd_core.workplace_user • sn_wsd_central.workplace_analytics_user

Tables installed with Workplace Reservation Management

Tables installed with Workplace Reservation Management

Table	Description
User Space Suggestions [sn_wsd_core_user_space_suggestions]	Retrieves user preferred space suggestions for employees having a workplace user profile. Make sure that Workplace Concierge is installed. For more information, see User Space Suggestions.
Space Suggestion Configuration [sn_wsd_core_space_suggestion_configuration]	Retreives user preferrences from the space suggestion configuration table. Make sure that Workplace Concierge is installed. Admin can specify the configuration and the space logic that needs to be considered while suggesting workplace locations, preferred collaborators, and workplace services to an employee. For more information, see Space suggestion Configuration. **Note:** Make sure only one record exist for each preference type.
Reservable Module [sn_wsd_rsv_reservable_module]	Extends the Application File table. Stores information about items that can be reserved.
Workplace Reservation [sn_wsd_rsv_reservation]	Extends the Reservation [sn_wsd_core_reservation] table. Stores information about reservations.

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Tables installed with Workplace Reservation Management (continued)

Table	Description
	Note: A new column **Auto Conflict Resolution state** is added to this table for indicating auto resolution states: 1. **In progress**: Process of resolving auto-conflicts is in progress. 2. **Automaically resolved**: Application automatically resolves the conflicted reservations. 3. **Not resolved**: Reservation events that the system could not resolve automatically. 4. **Manually resolved**: Users need to manually resolve the recurring reservation conflicts. 5. **Partially resolved**: Reservation conflicts which the system was not able resolve fully. 6. **All resolved**: All recurring reservations are successfully resolved.
Standard Service [sn_wsd_rsv_standard_service]	Stores information about standard services.
Workplace rooms [sn_wsd_core_room_list]	Extends the Space [sn_wsd_core_space] table. It holds the reservable items of a room that are available to reserve.
Reservable purpose [sn_wsd_rsv_reservable_purpose]	Stores information about reservable purposes added to Workplace spaces and Workplace Room
Extra service [sn_wsd_rsv_extra_service]	Stores information about extra services requested by employee while making a reservation.
Reservable Time Slot [sn_wsd_rsv_time_slot_list]	Stores information about the time slots.
Reservable View [sn_wsd_rsv_reservable_view]	Stores information about the reservable views.
Reservation path [sn_wsd_rsv_reservation_path]	Stores information about all the reservation paths.
Reservable Module View Configurations [sn_wsd_rsv_m2m_reservable_module_view_configuration]	Stores informations about the views that are displayed on the search page and their order.

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Tables installed with Workplace Reservation Management (continued)

Table	Description
Reservation recording [sn_wsd_rsv_reservation_recording]	Store information about all the reservation recordings. **Note:** If **WSD: Archive old reservations** archival rule is applied, then Reservation recording[**sn_wsd_rsv_reservation_recordin** table is also archived. For more information, see Apply the archive rule.
Layout [sn_wsd_rsv_layout]	Stores information about all the reservation layout
Location Layout [sn_wsd_rsv_m2m_location_layout]	Stores information about the layouts if a location such as carrier, round and more.
Reservable Module Workplace Location [sn_wsd_rsv_m2m_reservable_module_workplace_location]	Stores information about all the workplace locations assigned to a reservable module.
Virtual Meeting Provider [sn_wsd_rsv_virtual_meeting_provider]	Stores information about all the virtual meeting providers configured in the application.
Reservation Invitee [sn_wsd_rsv_m2m_reservation_invitee]	Stores information about all the reservation invitees. **Note:** If **WSD: Archive old reservations** archival rule is applied then Reservation invitee[sn_wsd_rsv_m2m_reservation_invitee table is also archived. For more information, see Apply the archive rule.
Location Standard Service [sn_wsd_rsv_m2m_location_standard_service]	Stores information about all the standard services added to a workplace location.
Location Reservable Purpose [sn_wsd_rsv_m2m_location_reservable_purpose]	Stores information about reservable purposes added to workplace locations.
Reservable Module User Criteria [sn_wsd_rsv_m2m_reservable_module_user_criteria]	Stores information about which users or groups have access to a reservable module.
Reservable Module Time Slot [sn_wsd_rsv_m2m_reservable_module_time_slot]	Stores information about all the time slots of Quick Reservation Widget.

Properties installed with Workplace Reservation Management

Properties available with Workplace Reservation Management.

These properties are available for Workplace Reservation Management (**All** > Workplace Reservation Management**Administration** > **Properties**).

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Note: These properties are also listed in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation context-menu filter.

Properties for Workplace Reservation Management

Property	Description
Minimal attendee availability for suggestions [sn_wsd_rsv.minimal_attendee_availability_for_suggestions]	This property allows for the configuration of minimum attendee threshold. The application enforces the configured minimum attendee threshold percentage value where applicable. Default value is 60. Beyond this range, employees cannot add colleagues as collaborators to a meeting. If the selected colleagues are not available for a selected building, date and time, the Add Invitees dialog box shows the "Unable to load Availability" message. For example, if only two invitees are available for a meeting or reservation, the application will not load availability for colleagues and will not add them as attendees to a reservation as it doesn't fulfill the default threshold percentile value of 60. For more information about adding colleagues to a meeting, see Add invitees as collaborators and create a reservation.
sn_wsd_rooms.default_page_size	This property enables you to specify the number of reservable entries displayed on a page. This value is used on the following pages: • On the Search page while loading reservable items. • On the Reservation summary page while loading sibling occurrence. • On the My reservations page. If an incorrect value is configured in the widget, the value specified in this property is used as a default value. • Type: Integer • Default value: **8**
sn_wsd_rsv.enable_auto_search	This property controls auto-search capability on the reservation portal while creating a reservation.By default, this property value is set to false. If set to true, the search button is not visible on the Advanced reservation portal page and the space details page. An auto search is triggered when one of the following information is changed in the reservation:

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Properties for Workplace Reservation Management (continued)

Property	Description
	• Building • Floor. • Start Date. • End Date. • All day option is enabled. • Recurring (Daily/Weekly, Monthly, and For/Until) is enabled. • Reservable modules are updated. • Reservable paths are updated. **Note:** All mandatory fields must be entered. The auto search capability is not triggered on the advanced search page if the mandatory fields are not filled in.
auto_refresh_search_rsv_data	Auto Refresh time interval(in mins) for showing reservables information while making a reservation. No auto refresh if set to 0 or negative number. Default value is 2 mins. Every 2 minutes (depending on the property value that you have provided in the sn_wsd_rsv.auto_refresh_search_rsv_data), the search results are refreshed. If results on the search page are outdated, the following message is shown along with a clickable referesh link, "The results you are viewing may be outdated. Please refresh to ensure you see the latest updates. Refresh the results."
[sn_wsd_rsv.search_limit]	This property enables you to specify the number of workplace items to be displayed in the search result. If an employee applies any filter or sorting on the search results, the first 100 workplace items that match the criteria are displayed at a time. 100 is the default value. The value specified in this property is used only if there is no value specified in the **Search limit** field of a reservable module. • Type: Integer • Default value: **100**
sn_wsd_rsv.time_before_check_in_out_reminder	This property enables you to configure when to send a notification email as a reminder to employees to check in or check

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Properties for Workplace Reservation Management (continued)

Property	Description
	out a reservation. The value must be set in minutes. • Type: Integer • Default value: **30**
sn_wsd_rsv.day_start	This property enables you to specify the start time of an all day reservation. The value must be set in 24-hour format. • Type: String • Default value: **09:00**
sn_wsd_rsv.day_end	This property enables you to specify the end time of an all-day reservation. The value must be set in 24-hour format. • Type: String • Default value: **17:00**
sn_wsd_rsv.is_blocker_mandatory	This property enables you to specify if the blocker reservations are mandatory. The blocker reservations are created for preparation and clean-up activities if an extra service is requested along with the reservation. If you enable this property, and if the blocker reservations collide with another reservation, then the extra service will not be requested. The employee who made the reservation with these extra service, can view the message about the rejected service on the Reservation summary page. **Note:** If an extra service is requested for a workplace location that requires approval, the blocker reservations are sent for approval along with the actual reservation. • Type: true/false • Default value: **false**
sn_wsd_rsv.blocker_user	This property enables you to specify the user who is used to create the blocker reservations.

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Properties for Workplace Reservation Management (continued)

Property	Description
	• Type: String • Default value: **9b21b32ddb88b01097acc900399619d8**
sn_wsd_rsv.cancel_unconfirmed_reservations	This property enables you to specify after how many minutes should a reservation be canceled if there is no confirmation from the calendar provider. • Type: Integer • Default value: **360**
sn_wsd_rsv.time_when_reservation_cancelled_without_check_in	This property enables you to specify after how many minutes should a reservation be canceled if it is not checked in. Ensure that the you have enabled the **Cancel reservations exceeding check-in time** option in the reservable module on which you want to apply this action. • Type: Integer • Default value: **30**
sn_wsd_rsv.default_quick_reserve_reservable_module	This property enables you to specify the default reservable module that must be available on the Now Mobile app to employees for quick reservation. Specify the sys_id of the reservable module that supports quick reservation. • Type: String • Default value: empty
sn_wsd_rsv.meeting_provider	This property enables you to set the virtual meeting providers to generate a meeting link. • Type: choice list • Default value: none
sn_wsd_rsv.recording_buffer_time	This property enables you to set the time in minutes by when ta meeting recording must be retrieved. • Type: integer • Default value: 30

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Properties for Workplace Reservation Management (continued)

Property	Description
sn_wsd_core.ENABLE_LOCATION_PRIVACY	This property enables you to set privacy on location and also specify what type of privacy you want to set. • Type: choice list • Default value: none
sn_wsd_rsv.enable_recurring_score	This property enables you to display recurring availability within the series of a workplace location when an employee searches for workplace to make a recurring reservation. • Type: true/false • Default value: false
sn_wsd_rsv.lead_time_info_message_for_limited_services	This property enabled displays a message "Only items that can be prepared on time are available". This message is displayed only for the special user sn_wsd_case.bypass_services_limitation and not for regular employees.

Workplace Reservation Management - Field descriptions

Find the field descriptions of forms used in the Workplace Reservation Management application.

Space form

Use the Space form to add a space for a reservation.

New space form

Field	Description
Name	Enter the name of the space.
Space type	Type of the office space.
Capacity	Specify the maximum capacity of the space for reservation.
Active	Select this option to make the space active for reservation.
Is reservable	Select this option to make the space reservable for employee use.
Requires approval	Select this option if the reservation made on this space requires approval.
Requires check-in	Select this option if the reservation made on this space requires a check-in.

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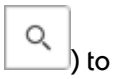
New space form (continued)

Field	Description
Organization details tab	Select the field details from the Organizational details tab.
Region	Office region where the room is located.
Site	Site location of the office campus.
Campus	Campus from which the office operates.
Building	Office building where the space is located.
Floor	Floor on which the space is located.
Area	Area on the floor where the space is located.
Extra information tab	Select the field details from the Extra information tab.
Reservable quantity	If there are multiple spaces of the same type, specify the reservable quantity. Employees can reserve the space up to the specified number. This value is used while assigning spaces to an area.
Managed by	The workplace manager of the group that manages the reservation for the floor plan. Click the Lookup using list icon () to view a  list of group managers you can select.
Managed by group	he group that manages the reservation for the floor plan. Click the lookup using list icon () to view a list of groups you can select.
Description	Short description about the space.
Image	Upload an image of the space. The supported ratio of an image is: 26:17.

Add a room form

Use the room form to add a room for workplace reservation.

New room form

Field	Description
Name	Enter the name of the room
Capacity	Specify the maximum capacity of the room for reservation.
Email	Email address of the room to make a reservation request. The email address is

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New room form (continued)

Field	Description
	used to check availability of the room and to block its calendar for a reservation. If you have installed Workplace Calendar Synchronization application, ensure that the email address is same as the one set in the calendar provider. Later, as an admin, you can change the email address of the room. The changes are automatically applied in the Reservable Sync Configuration. The calendar provider synchronizes the resources based on the entered email.
Active	Select this option to make the room active for reservation.
Is reservable	Select this option to make the room reservable for employee use.
Requires approval	Select this option if the reservation made on this space requires approval.
Requires check-in	Select this option if the reservation made on this room requires a check-in.
Organization details tab	Select the field details from the Organizational details tab.
Region	Office region where the room is located.
Site	Site location of the office campus.
Campus	Campus from which the office operates.
Building	Office building where the room is located.
Floor	Floor on which the room is located.
Area	Area on the floor where the room is located.
Extra information tab	Select the field details from the Extra information tab.
Managed by	The workplace manager of the group that manages the reservation for the floor plan. Click the Lookup using list icon to view a list of group managers you can select.
Managed by group	The group that manages the reservation for the floor plan. Click the lookup using list icon to view a list of groups you can select.
Reservable quantity	If there are multiple rooms of the same type, specify the quantity. Employees can reserve the room up to the specified

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New room form (continued)

Field	Description
	quantity. The quantity is used when assigning neighborhood spaces to an area.
Description	Short description about the room.
Image	Upload an image of the room. The supported ratio of an image is: 26:17.

User criteria form

Use the User Criteria form field information when creating a new user criteria record.

User criteria form

Field	Description
Name	Name of the user criteria.
Users	Users who can access the reservable modules when you apply the user criteria. Click the unlock users icon ( ) to select users. Click the add me icon ( ) to add yourself as a user.
Groups	Groups who can access the reservable modules when you apply the user criteria. Click the unlock groups icon ( ) to select the groups.
Roles	Roles who can access the reservable modules when you apply the user criteria. Click the unlock roles icon ( ) to select the groups.
Advanced	Option to create a script for the user criteria.
Application	This field is automatically set to `Workplace Reservation Management`.
Active	Option to make the user criteria available.
Companies	Companies who can access the reservable modules when you apply the user criteria. Click the inlock companies icon ( ) to select the companies.
Location	Locations which can access reservable modules when you apply the user criteria. Click the unlock locations icon ( ) to select the locations.
Departments	Departments who can access reservable modules when you apply the user criteria. Click the unlock departments icon ( ) to select the departments.
Match All	Option to make every condition required when the user criteria is applied. The conditions are

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User criteria form (continued)

Field	Description
	set in the previous fields, such as **Location**, **Department**, and so on

Related topics

Create a user criteria record

Apply user criteria on a reservable module

Proximity calculation when browsing near a person

When an employee searches for a space near a person using the **Browse near a person** option, the workplace locations are displayed based on the closest proximity.

Proximity calculation flow

The factors that influence the proximity based search are explained below:

1. **Floor plan**: After the employee specifies the colleague near whom they want to reserve a space, the application checks if the colleague's location has a floor plan defined.
   - If there is a floor plan, then the floor map coordinates are used to find the nearest space.
   - If there is no floor plan, then the next step is performed.
2. **Area**: If there are no floor plans defined for the colleague's location, then the application checks if the location is part of an area.
   - If the location is part of an area, then the available spaces are displayed based on the area configuration.
   - Only available spaces on the floor where the employee is located are displayed.
   - If the location is not part of any area, then the next step is performed.
3. **Tag**: If the location is not part of any area, then the application checks if the colleague's location has any tags.
   - If the location has a tag, then all the available spaces with the same tag value are displayed.
   - Only available spaces on the floor where the employee is located are displayed.
   - If the location does not have a tag, then all the available spaces of the floor where the colleague is located are displayed.

- For proximity based search that involves area and tag, only the available spaces on the floor where the employee is located are displayed.
- If there are is no area or tag defined, then the available spaces of that floor are displayed. If there are no available spaces on that, then a message is displayed that there no matching spaces found.
- By default the **My favorites first** sort option is selected when an employee searches for spaces using the **Browse all** or **Browse by area** option.
- If an employee searches for a space using the **Browse near a person** option, then the spaces are displayed based on the closest proximity. If the employee selects the **My favorites first** sort option, then the favorite spaces of that employee which have the closest proximity are displayed first.

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By default, all the available spaces are displayed based on the above proximity calculations. In case the employee has set favorite locations and has selected the **My favorites first** sort option, then the favorite locations are displayed at first.

Reservable module derivation logic for Space details

While selecting a reservable module from the Space details page, system identifies the reservable module based on the derivation logic.

When you select a space from the Space details page, application selects a suitable reservable module to make a reservation. The system attempts to select a reservable module with no **Min durations** and **Max durations**. In the absence of such a module, a reservable module with **Min durations** and **Max durations** set is chosen. In either case, if there are multiple modules satisfying the space criteria, the following logic is applied:

Reservable Modules without Min and Max duration values

- Workplace Reservation Management first selects a reservable module that has no **Min duration** and **Max duration** values set. If there are multiple modules with no **Min Duration** and **Max Duration** values, then application assigns the reservable module based on the following:

- ○ System checks for Reservable Modules where the **Override approval policy** is **Never require approval**, in case it does not find such a module, priority is given to a module with approval policy **No Override** followed by **Always require approval**.
  - ○ If there are multiple modules having the same approval policy, system assigns the reservable modules where **Recurring** reservation is allowed.
  - ○ If **Recurring** is allowed for multiple modules, system tries to assign the reservable modules where **Allows all day** reservation is allowed.
  - ○ If **Recurring** is allowed and **All day** is set, the system selects a reservable module where **All day** is not mandatory.

Reservable Modules with Min and Max duration values

The same selection criteria for reservation modules is applied in this case as with no **Min duration** and **Max duration** values. Only difference is that the system checks for whether the **Start time** and **End time** duration matches with the **Min duration** and **Max duration** values. If there are multiple modules having similar field values, system assigns the reservable module on the following logic:

- If there are multiple modules having the same approval policy, system assigns the reservable modules where **Recurring** reservation is allowed.
- If **Recurring** is allowed for multiple modules, system checks for and assigns the reservable modules where **Allows all day** reservation is allowed.
- If **Recurring** is allowed and **All day** is also set, then, system selects a reservable module where **All day** is not mandatory.

For more information, see Configure a reservable module.

Mobile push notifications for workplace reservations

As a workplace admin, you can configure push notifications that you want to send to an employee on their mobile devices to alert them about important events and enable them to perform an action.

To configure mobile push notifications, refer to Mobile push notifications.

As an employee, to receive push notifications, you must have the following:

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- Push notifications are enabled by your organization.
- Following plugins:
  - Workplace Reservation Management
  - Workplace Service Delivery for Mobile version 1.5.1.

    Workplace Service Delivery for Mobile version 1.5.1 supports the Tokyo family release. If you are using Workplace Service Delivery for Mobile version 1.3.4 or earlier versions, it is not possible to receive any push notifications.
- You must be logged in on your mobile.

Push notifications are sent for events such as, when a reservation is created or updated on your behalf, or when a reservation is required to check in or check out.

- The push notifications are triggered by the following scheduled jobs when there are any upcoming events.
  - **Check-in/out reminder**: The schedules job runs periodically and sends out notifications regarding upcoming reservation check in and check out. The scheduled jobs uses the *sn_wsd_rsv.time_before_check_in_out_reminder* and *sn_wsd_rsv.time_when_reservation_cancelled_without_check_in* system properties for the time intervals.
  - **Trigger mobile push notifications for upcoming reservation events**: The schedules job runs periodically and sends out notifications regarding upcoming reservation events.
- The system also sends actionable push notifications with actions such as **Check-In** and **Check-Out** to the mobile devices.
- Notifications are sent in English.
- Push notifications are sent on iOS and Android mobile devices.

Push notifications scenarios

As an employee, you will receive push notification for the following scenarios:

Reservation is ready for check in

An actionable push notification is received that you can check in the reservation. You can check in the reservation directly from the notification by selecting the **Check-In** option. After the selection, the reservation is checked in and you are navigated to the reservation details page.

Reservation check in about to start in a few minutes

Push notification is received that you can check in the reservation in a few minutes.

Reservation is created for you by someone

Push notification is received that a reservation is created for you by someone on your behalf.

Reservation about to start

Push notification is received that the reservation is about to start.

Reservation cancelled due to check in delay

Push notification is received that the reservation is cancelled as it was not checked in on time.

Reservation created for you by someone is updated

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Push notification is received that the reservation made on your behalf by someone has been updated.

Reservation about to end

Push notification is received that the reservation is about to end.

Reservation is ready for check out

An actionable push notification is received that you can check out the reservation. You can check out the reservation directly from the notification by selecting the **Check-Out** option. After the selection, the reservation is checked out and you are navigated to the reservation details page.

Reservation started but pending check in

Push notification is received that you are yet to check in the reservation even after the reservation start time.

Reservation ended but pending check out

Push notification is received that you are yet to check out the reservation even after the reservation time has started.

Location privacy settings and impact

Set location privacy on workplace reservations and workplace profiles in your organization. Implement privacy throughout the organization or only on a building using the Workplace Service Delivery location privacy settings.

System property settings

Using the Workplace Reservation Management system properties you can specify your location privacy preferences on workplace profiles and workplace reservations that belong to your organization.

You can set the location privacy using the following navigation:

- **All** > **Workplace Reservation Management** > **Administration** > **Properties**
- System Properties [sys_properties] table. To access the table, enter sys_properties.list in the navigation filter.

The following properties are provided in the application to implement location privacy:

- *sn_wsd_core.ENABLE_LOCATION_PRIVACY*: Enables you to set location privacy preference. You can apply privacy on workplace profiles and workplace reservations. The following options are provided:
  - **No privacy**: Select this option if you don't want to set any privacy. The property is set to **No privacy** by default.
  - **Workplace profiles only**: Select this option to set privacy on workplace profiles.
  - **Reservations only**: Select this option to set privacy on workplace reservations.
  - **Reservations and workplace profiles**: Select this option to set privacy on both workplace profiles and workplace reservations.
- *sn_wsd_core.OVERRIDE_RESERVATION_PRIVACY*: Enables you to let employees override the location privacy on a reservation. The property is set to **no** by default.
- *sn_wsd_core.PRIVACY_INFORM_EMPLOYEE*: Enables you to inform employees when privacy is applied on a workplace profile or reserved spaces. The property is set to **false** by default.

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Building settings

If required, you can apply different location privacy settings on a building. That is, you can set privacy on workplace profiles or reservations made on that building. The privacy setup on the building won't affect other locations of your organization.

When you enable location privacy on a building, the privacy is inherited by the locations and workplace profiles in that building. The privacy setup of the building is considered instead of the privacy setup made on an organization level using the system properties.

In a building record, specify your location privacy preferences in the following fields:

- **Enable employee location privacy and preference**: Use this field to set your location privacy preference for the building. The following options are provided:
  - **None**: Select this option if you don't have any particular privacy preference on the building. When you set this option, the privacy preference that is set in the Workplace Reservation Management system property *sn_wsd_core.ENABLE_LOCATION_PRIVACY* is considered. The field is set to **None** by default.
  - **No privacy**: Select this option if you don't have any privacy requirement.
  - **Workplace profiles only**: Select this option to set privacy on workplace profiles.
  - **Reservations only**: Select this option to set privacy on workplace reservations.
  - **Reservations and workplace profiles**: Select this option to set privacy on both workplace profiles and workplace reservations.
- **Allow employees to override location privacy on reservations**: Use this field to specify if you want to let employees override the location privacy while reserving spaces that belong to this building. The field provides the following override options:
  - **None**: Select this option if you don't have any particular privacy requirement. When you set this option, the location privacy override preference that is set in the Workplace Reservation Management system property *sn_wsd_core.OVERRIDE_RESERVATION_PRIVACY* is considered. The field is set to **None** by default.
  - **Yes**: Select this option if you want to let employees override the privacy preference that is configured for the location that they want to reserve.
  - **No**: Select this option if you want to restrict employees from overriding the privacy preference that is set on the location that they want to reserve.

  To specify privacy on a building, refer to Add a building using Workplace Space Management.

Workplace profile setting

If required, set location privacy on a workplace profile directly. By default, the location privacy preference that is set on the building in which the workplace profile is located is considered. In case, the building doesn't have any location privacy preference, the preference set in the Workplace Reservation Management system property *sn_wsd_core.ENABLE_LOCATION_PRIVACY* is considered.

The **Enable employee location privacy** field provides the following options:

- **None**: If you set this option, then the privacy setting made on the building where the workplace profile is assigned is considered. The field is set to **None** by default.
- **Yes**: Select this option if you want to set privacy on the workplace profile.
- **No**: Select this option if you don't want to set privacy on the workplace profile.

To specify privacy on a workplace profile, refer to Map designated workspaces to user profiles.
The location privacy is implemented as follows:

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- If set you set the field as **Yes**, then privacy is set on the workplace profile.
- If you set the field as **No**, then the workplace profile isn't set as private. Even if the building to which the workplace profile is located has privacy enabled, the workplace profile will still remain private.

Reservable module setting

Apart from the location privacy settings that you make in the system properties or on a building, the application also enables you to make a setting on the reservable module. You can enable employees to set the space details as private while making reserving a space that belongs to the reservable module. Use the **Enable employees to make spaces as private** option to specify your location preference. For more information, refer to Configure a reservable module.

The privacy override of a space while making a reservation, depends on the following:

- If the **Enable employees to make spaces as private** is enabled on the reservable module and if location privacy override by employees is set to **Yes** in the privacy override setup, then the employees can override privacy in their reservation. The **Make space details private** option appears to the employees while making a reservation.
- If either the **Enable employees to make spaces as private** is turned off on the reservable module or if the location privacy override by employees is set to **No** in the privacy override setup, then the employees can’t override privacy in their reservation. The **Make space details private** option doesn't appear to the employees while making a reservation.

Location privacy processing

The location privacy is processed as follows:

- Always, the privacy setup that is made in the Workplace Reservation Management system property is considered except in case a building or a workplace profile has its own privacy setup.
- Similarly, the privacy override setup that is made in the Workplace Reservation Management system property is considered except in case a building or a workplace profile has its own privacy override setup.
- **Workplace profile**:
  - If a workplace profile has privacy setup, then that is considered.
  - If a workplace profile has no privacy setup, then the privacy setup that is set on the building in which the workplace profile is located is considered. If the building has no privacy setup, then the privacy setup that is set in the Workplace Reservation Management system property is considered.
- **Building**:
  - If a building has privacy setup, then that setup is considered.
  - If a building has no privacy setup, then the privacy setup made in the Workplace Reservation Management system property is considered.

Privacy information

When a reservation is requested, to know more about privacy-related setting, open the list of reservations through one of the following:

- Workplace Core: Navigate to **All** > **Workplace Core** > **Space Reservations** > **All reservations**.
- Workplace Reservation Management: Navigate to **All** > **Workplace Reservation Management** > **Reservation Overview** > **All Reservations**.

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From the list view of the reservations, you can know the following:

- Privacy setting by viewing the **Space details private** column of the reservation. The column displays if the privacy setting is set as **True** or **False**.
- Privacy information, that is, from which source the privacy has been implemented, by viewing the **Privacy info** column. The column provides details of how the privacy has been set for the reservation in detail.

Impact of location privacy

Depending on the location privacy preferences, the following areas are affected.

Browse near a person

Based on the location privacy, the fields in the Reservation portal **Browse near a person** section is influenced as follows. The following scenarios are explained using examples:

- If either the workplace profile of Employee A or if the reserved space of Employee A is private, then when another employee - Employee B searches for this employee to reserve a space nearby, the details related to the reserved space do not appear.
- If the reservation is made by Employee B for Employee A, or if Employee B is invited to the reservation, or if the reservation is shared with Employee B, only then, the reservation details of Employee A's reserved space appears in the search results for Employee B.

Schedule view

On the Reservation portal, if a reservation is marked as private, the **Schedule view** of the space won't show any employee-related details if there's a reservation for a certain time.

If a reservation is made by Employee B for Employee A, or if Employee B is invited to the reservation, or if the reservation is shared with Employee B, only then the employee-related details of Employee A will appear in the **Schedule view** for Employee B.

Location directory

When an employee uses the Workplace Service Portal Location directory to search for a colleague or a space, depending on the privacy setting, the following happens:

- If the colleague for which an employee is searching for has their workplace profile set as private, then their location details aren't displayed.
- If there's an ongoing private reservation of Employee A on a workspace/desk Space 123, on then
  - If Employee B searches for Employee A, then the reserved space, Space 123, won't appear in the search. A **Private** tag is displayed on the search result card.
  - If Employee B searches for Space 123, then the details of Employee A who reserved this space won't be displayed in the search results. A **Private profile** tag is displayed on the search result card.
- If a reservation is made by Employee B for Employee A, or if Employee B is invited to the reservation, or if the reservation is shared with Employee B, only then, the employee-related details appear in the Location directory for Employee B.

Workplace Service Delivery for Mobile

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If Employee A's workplace profile is set as private or has an ongoing private reservation, then when an Employee B searches for Employee A, or tries to get directions, the details related to the Employee A's location aren't displayed. Also, the **Get directions** option isn't displayed to Employee B.

If any reservation is made by Employee B for Employee A, or if Employee B is invited to a reservation made by Employee A, or if the reservation by Employee A is shared with Employee B, only then, the employee-related details appear to Employee B. The **Get directions** option is displayed to Employee B.

Quick Reservation widget

If the **Enable employee location privacy and preference** is set to **Reservations only** or **Reservations and workplace profile** in the privacy setup, then the space that is suggested as best match has privacy enabled by default.

The option **Mark space details private** is displayed only if the employees are allowed to override their privacy preference for the space. Whether an employee can override privacy or not depends on the location privacy setup.

Workplace Reservations for Microsoft Outlook Add-in

In the add-in, the privacy of the spaces that are displayed in the search results depends on their privacy setup. The option **Mark all space details private** is displayed only if the employees are allowed to override their privacy preference for the selected space. Whether an employee can override privacy or not depends on the location privacy setup.

Workplace Calendar Synchronization

If a reservation is made using the Reservable Sync Configuration, then the privacy is implemented on the reservation based on the privacy setup made on the building to which the space belongs.

Additional details record producer - Mapping Variable types and limitations

When you create a record producer to configure additional details on a reservation form, the variables types and column type must be set differently. In case of reservations, the record producer supports only a few UI policies and client scripts.

Mapping Variable 'Type' with column type

When you add variables to the record producer, based on the type of field you want, select the **Type** of the variable as follows. For example, In the Workplace Reservation table, in the Columns related list, to set the column **Type** as a **String**, on the record producer, select the variable **Type** as **Multi Line Text**:

Workplace Reservations Table, Column - 'Type' mapping with Record producer, Variable - 'Type'

Workplace Reservations Table, Column - 'Type'	Record producer, Variable - 'Type'
True/False	checkbox
Date	Date
Date/Time	Date/Time
Duration	Duration
HTML	HTML
IP Address (Validated IPV4, IPV6)	IP address

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Workplace Reservations Table, Column - 'Type' mapping with Record producer, Variable - 'Type' (continued)

Workplace Reservations Table, Column - 'Type'	Record producer, Variable - 'Type'
List	List collector
Choice	Lookup multiple choice
Choice	Lookup Select Box
Password (1 & 2 Way Encrypted)	Masked
String	Multi Line Test
Choice	Multiple Choice
Integer	Numeric Scale
Reference	Reference
Choice	Select Box
String	Single Line Text
URL	URL
String	Wide Line Single Text
Choice	Yes/no

Note: The max length of a **Single Line Text** is 40. For a longer length, use **Multi Line Text**.

Additional details record producer - Limitations

When you configure the record producer, note the following:

- **Script** field is not applicable.
- You can add **Catalog UI Policies** to the record producer.
- Only the following **Catalog Client Scripts** type are supported:
  - OnChange
  - OnLoad

Note: The record producer is only used to retrieve data related to the additional fields.

Record producer Related list: The following record producer related lists are not applicable:

- Variable Sets
- Not Available For
- Categories
- Catalogs
- Catalog Data Lookup Definitions
- Related Articles
- Related Catalog Items
- Assigned Topics

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In the Available For Related list, you must create a **User Criteria** with the **Advanced** setting enabled. In the **Script** field, you must set "answer=false", so that the record producer is not be visible outside the reservation details page.

Variables Related list: The following Variables related lists are not applicable:

- Permission
- Availability

Configuring additional details column in Workplace Reservation table - Limitations

In the Workplace Reservation (sn_wsd_rsv_reservation) table, Columns related list, when you add fields (columns) that are not included, note the following:

- On the Dictionary Entry form, the **Mandatory**, **Read only** and **Display** fields are not applicable.
- The columns in the table are created to only store the data.
- The **Max length** field is considered to save the data with **Max length**.

Workplace Case Management

Fulfilling employee workplace requests involves multiple, complex back-end processes, including analyzing the requests for type and routing them to human or automated responses, approvals, or other tasks. The ServiceNow® Workplace Case Management application makes these processes simpler and more efficient by letting you create pre-defined steps to fulfill requests.

Get started

Explore Learn about Workplace Case Management concepts and features.	**Configure** Configure workplace services and related settings using which employees can submit workplace requests.	**Request** Request workplace-related services. Raise a general enquiry, office reconfiguration, and more.
Manage Manage workplace cases, approvals and more.	**Integrate** Extend the Workplace Case Management abilities by integrating with other applications.	**Analytics and Reporting Solutions** Coordinate work and improve processes with dashboards and reports.

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	Reference  Get details about components like fields, tables, and properties.	

Exploring Workplace Case Management

Fulfilling employee workplace requests involves multiple, complex back-end processes, including analyzing the requests for type and routing them to human or automated responses, approvals, or other tasks. The ServiceNow® Workplace Case Management application makes these processes simpler and more efficient by letting you create pre-defined steps to fulfill requests.

Request a workplace service

As an employee, the Workplace Service Portal allows you to submit requests for workplace services like general inquiries, cleanliness requests, and travel-related requests. For example, you can create a request for HVAC issues, broken chairs, floor spills, move requests, and more.

Manage workplace cases

As a Workplace Case Management Manager and Admin, you can:

- Configure whether a request must be fulfilled manually or if it requires a set of automated tasks.
- Configure approval options for tasks.
- Create case and task templates.
- Create catalog items called record producers so that employees can raise requests.
- View and modify all cases created in the application.
- Configure an escalation rule for assignment groups.
- Add fulfillment instructions.
- Create an SLA definition.

Workplace Central - Case Management workspace

You can also manage all the workplace cases from a single place using the Case management workspace in the Workplace Central workspace. The Case management workspace helps you to handle hundreds of workplace cases requested in the organization on a daily basis. Instead of using the Workplace Case Management application to monitor the cases, the workspace provides you a simple and efficient display of the same cases under various categories to help you handle them easily. Instead of verifying hundreds of cases and reading the data specified in detail, the workspace analyzes them and presents the data accordingly. The case details are displayed in a manner where you can find the most important information easily with few clicks and perform quick actions.

For more information, refer to Case management.

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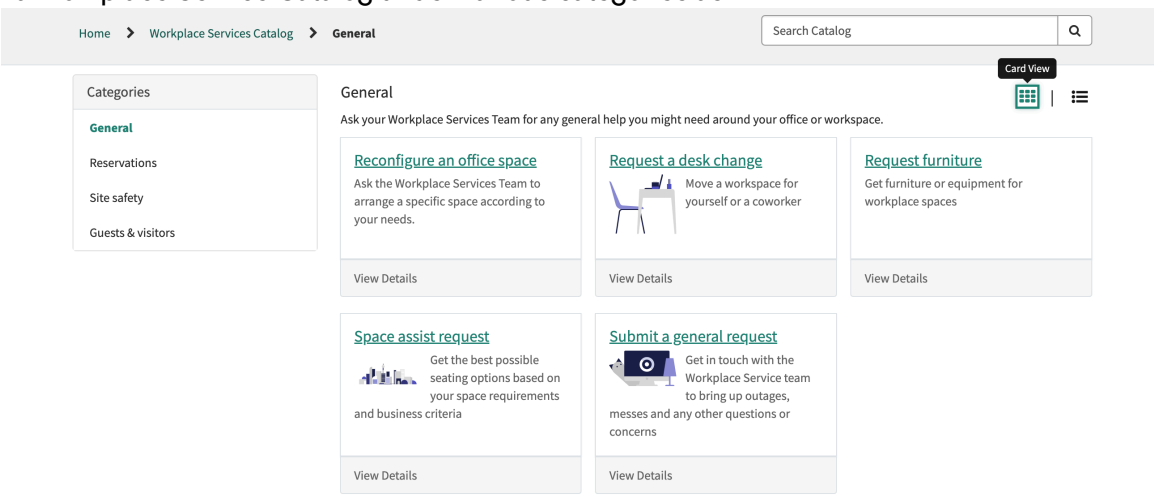
Workplace Services

The ServiceNow® Workplace Case Management application enables you to create a workplace service with pre-defined steps for fulfillment. You can create workplace services for requests like cleanliness, IT, office setup, and travel requests. For example, you can create a request for HVAC issues, broken chairs, floor spills, move requests, and more.

The workplace services that you create using the Workplace Case Management application are displayed in the Workplace Service Portal in a Workplace Service Catalog under various categories as



follows:

When you create a workplace service, you can configure the steps based on the type of fulfillment required. The ServiceNow® Workplace Case Management application provides the following fulfillment types:

- **Manual**: The Manual option enables you to configure a workplace service with human response. This works for services like general inquiries or complaints, and similar requests. Following is an example of how a manual workplace service is configured and displayed in the Workplace Service Portal.

  Manual Workplace Service created as 'General Workplace Enquiry' in the Workplace Case Management application:

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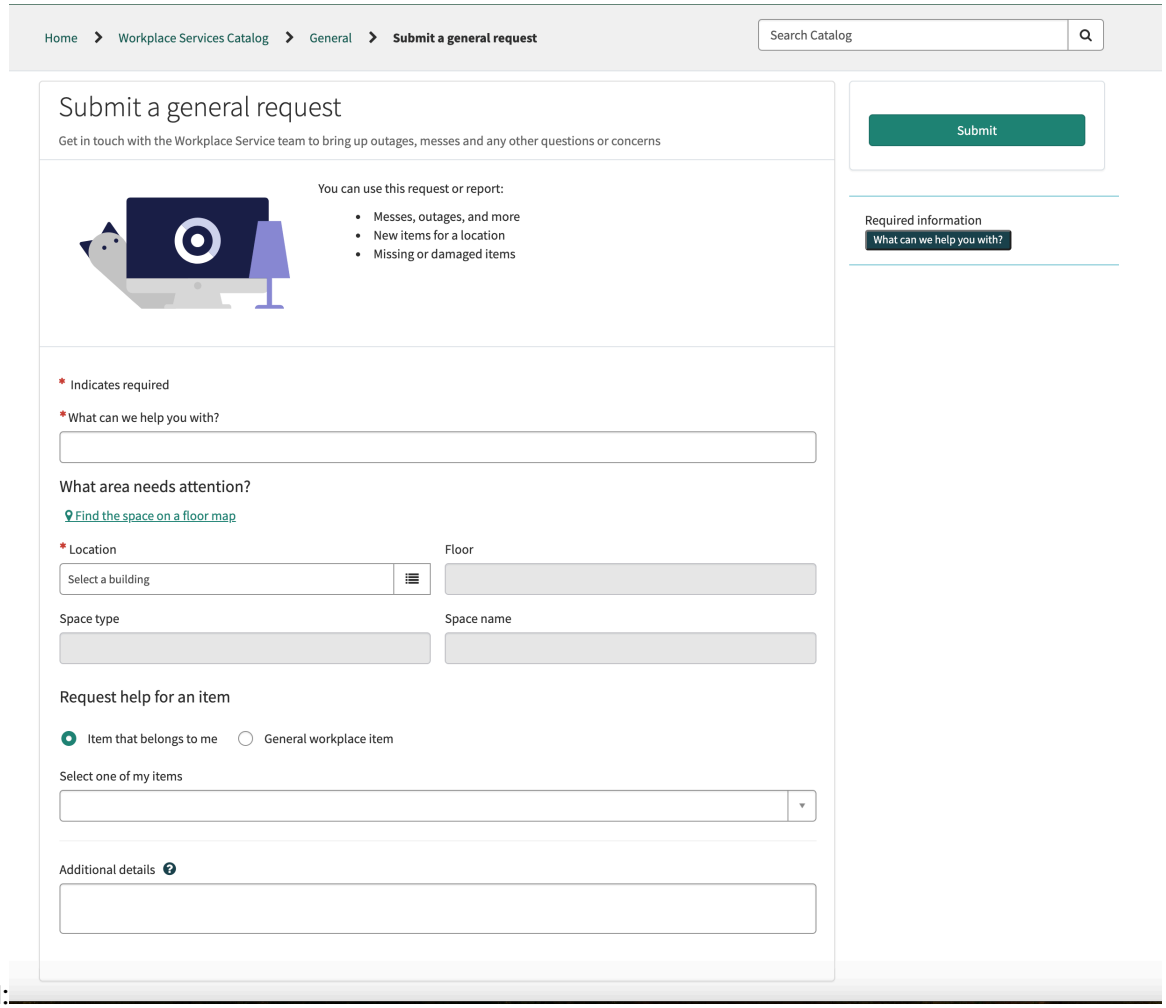
The workplace service 'General Enquiry' displayed as 'Submit a general request' in the Workplace Service Portal:



- **Service Activity**: The Service activity option enables you to select the type of activity triggered when a request is raised. You can specify the order in which these activities must be executed. You can select from the following types of workplace service activities:
  - **Approval**: Enables you to set approvals on workplace service activity. You can configure what type of approval is required on selecting the workplace service. You cannot set more than one approval activity in a single order.
  - **Task**: Enables you to add a task using a task template. When the workplace service is selected, the task is created based on the order specified.
  - **Child case**: Enables you to trigger child cases on selecting the workplace service. A workplace service must be provided for a child case. The child case is created based on the order specified.
  - **Execute service item**: Executes the tasks or cases created for workplace service items ordered by an employee along with the workplace service. For more information, see Add a workplace service item to a workplace service.
  - **Automated task**: Creates an automated task that will be closed without any manual intervention.
- **Flow**: The flow option enables you to select an existing sub-flow from the application. For more information about Flows, see Flows.

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Raise workplace service requests

You can request a workplace service using the Workplace Service Portal or the Now Mobile app.

The Workplace Services catalog displays a list of workplace services from which your employees can submit requests. The following default Workplace services are provided by ServiceNow®:

- Request general workplace help.
- Reconfigure an office space.
- Raise a move request for a desk change.
- Request furniture for a space.
- If you have installed Workplace Central plugin, then the following workplace services are available:
  - Workplace User Assignment and Move Service via Scenario Planning
  - Workplace Assignment Type Service
  - Workplace Allocation Change Service
- Space request

- The above workplace services are triggered automatically based on the type of change implemented while scenario planning. For more information about Space optimization - scenario planning and it's features, refer to Scenario Planning.

You can also use the Virtual agent chat support on the Workplace Service Portal to submit a general inquiry. The chat support enables you to do the following:

- Request a workplace help.
- View the status of your submitted cases.
- View the cases that are awaiting acceptance.

Case and Task Templates

As a Workplace case manager, you can create templates to simplify the process of creating tasks and cases by populating fields automatically.

You can create the following types of template:

- **Case template**: A case template auto-populates fields when a case is being created.

  For information about creating case templates, see Create a Workplace case template.

- **Task template**: A task template auto-populates fields when a task is being created. You can modify predefined workplace task templates or create your own templates and associate them with workplace tasks.

  For information about creating task templates, see Create a Workplace task template.

- **Smart assessment template**: A Smart Assessment template defines a structured set of instructions, sections, and questions that guide agents in completing workplace cases or tasks. You can create and publish the template in the Smart Assessment workspace by selecting the appropriate Workplace table and configuring the assessment content. Once published, the template can be associated with trigger conditions so that it automatically attaches to qualifying workplace cases or tasks.

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Configuring Workplace Case Management

As an admin, you can configure Workplace services and enable Workplace Services users to submit requests through it. The application enables you to configure workplace services with pre-defined fulfillment types.

The ServiceNow® Workplace Case Management application enables you to administrate all the workplace services and cases created using these workplace services.

As a workplace case admin or a case manager, you can perform the following actions.

- Configure Workplace services.
- Configure Case templates for workplaces cases.
- Configure Task templates for workplace tasks.
- Configure Record producers and link them with a workplace service.
- Configure the Approval options and select the type of approvals that are required for a service activity.
- Create Workplace Service Activities such as tasks, approvals, and child cases.

Install Workplace Case Management

Install the Workplace Case Management application from ServiceNow Store applications. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup checklist.

Setup checklist

Setup tasks	Description
Verify that Workplace Service Delivery - Core (sn_wsd_core) plugin of minimum version 2.0 is activated.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
Verify that Workplace Case Management (sn_wsd_case) plugin is activated.	Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

Activate the Workplace Service Delivery - Core plugin of minimum version 2.0 (sn_wsd_core) in your ServiceNow instance before you install Workplace Case Management.

Use the following details when required:

- Name of the application: Workplace Case Management
- ID of the application: sn_wsd_case

Role required: admin

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About this task

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Case Management.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.
6. Click **Install**.

Create a Workplace case template

Create a Workplace case template for use when creating workplace services.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task
A Case template simplifies the process of creating cases in Workplace Case Management by populating fields automatically.

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Case templates**.
2. Create a template or modify an existing template.
   - To create a template, select **New**.
   - To modify an existing template, select the template from the list.

   For information about the template form fields, see Create a template.
3. In the **Table** field, select the **Workplace case [sn_wsd_case_workplace_case]** table.
4. Select **Submit**.

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Result
The case template is created. You can use the template for workplace services.

What to do next
Create a case template with user acceptance, for more information, see Create a User acceptance Workplace case template.

Create a User acceptance Workplace case template

Create a Workplace case template with user acceptance.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task
Create this case template for use when a user's approval or rejection is required to close the request.

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Case templates**.
2. Create a template or modify an existing template.
   - If you are creating a new template, click **New**.
   - If you are modifying an existing template, open the desired template.

   For information about the template form fields, see Create a template.
3. In the **Table** field, select the **Workplace case [sn_wsd_case_workplace_case]** table.
4. In the **Template** field, enable user acceptance and acceptance time-out.
   a. In the left column, select **Enable user acceptance** and in the right column, select **True**.
   b. In the left column, select **Acceptance timeout** and in the right column, specify the duration after which the acceptance request can expire.
5. Click **Submit**.

Result
The Case template is created with user acceptance options enabled.

What to do next
Use the template in Workplace services where user acceptance is required. For more information about creating Workplace services, see Create a Workplace service.

Create a Workplace task template

A Task template simplifies the process of creating tasks in Workplace Case Management by populating fields automatically.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task
Create a task template for use when creating a workplace service.

Note: Administrators may use task assignment rules to control the automatic assignment of workplace tasks as long as the task template is not already assigning a person or group to the task. For more information on assignment rules, see Define assignment rules.

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Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Task templates**.
2. Create a template or modify an existing template.
   - If you are creating a template, click **New**.
   - If you are modifying an existing template, open that template.

   For information about the template form fields, see Create a template.
3. In the **Table** field, select the **Workplace Task [sn_wsd_core_workplace_task]** table.
4. Click **Submit**.

Result
The task template is created. You can use this template for Workplace services.

Smart Assessment for Workplace Case and Task

Smart Assessment enables workplace case managers to create structured assessment templates with customizable questions and sections. These assessments can be automatically triggered based on specific conditions, such as state changes in workplace cases and tasks. Workplace agents complete these assessments as part of their workflow, ensuring standardized data collection and quality control.

The following plugins must be installed:

- Smart Assessment Core (sn_smart_asmt)
- sn-smart-assessment-designer (sn_smart_asmt_desg)
- sn-smart-assessment-connected (sn_smart_asmt_conn)
- Post Assessment Actions for Smart Assessments (sn_smart_imp_auto)
- sn-reusable-impact-framework
- snc.smart_asmt_dep

Create an assessment template category

Assessment template categories help organize and classify smart assessment templates based on their purpose or use case. Categories make it easier to locate and manage templates within the assessment workspace.

Before you begin
Role required: sn_smart_asmt.assessment_admin or sn_wsd_case.manager

Procedure

1. Navigate to **All** > **Smart Assessment Engine** > **Administration** > **Template Categories**.
2. On the Assessment template categories page, select New and then fill in the form.

Assessment template category

Field	Description
Name	Unique meaningful name for the template category. For example, Workplace services.
Category role	Minimum role that you must have to view any template that is a member of this category. To view a template in

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Field	Description
	a particular category, you must have one of the category roles that is associated with the category. Each category has one category role.
Description	Text that helps others to understand the purpose of including templates in this category.
Active	Option to activate the category. By default, newly defined template categories are active

3. Select **Submit**.
   The system generates the assessment template category and adds it to the list of categories that can be specified when designing an assessment template. Active categories are only available for use while categorizing templates.

Create Smart Assessment template for Workplace Case and Task

Smart assessment templates define the structure, questions, and sections that workplace agents complete when working on cases and tasks. Case managers create templates to standardize data collection and ensure consistent quality checks across workplace cases and tasks. These assessments automatically attach to cases and tasks based on configurable trigger conditions.

Before you begin

Role required: sn_wsd_case.admin or sn_wsd_case.manager

Note: Make sure that the Smart Assessment plugin is enabled before creating assessment templates.

Procedure

1. Navigate to **Workspaces** > **Workplace Central** > **Case Management**.
2. Select **Create Smart Assessments**.
3. On the Assessment Workspace page, select **New template**.
4. On the form, fill in the fields.

Create assessment template form

Field	Description
Template name	Name of the template. If you want to add a separate assessment name, select the T+ icon and add a name for the assessment.
Description	Description of the template.
Purpose	The assessment template category for the new template. For example, Workplace services.
Assessment targets	Select the table that assessments will access. For example, Workplace case [sn_wsd_case_workplace_case]. Select only one table from the list.

5. Select **Create**.

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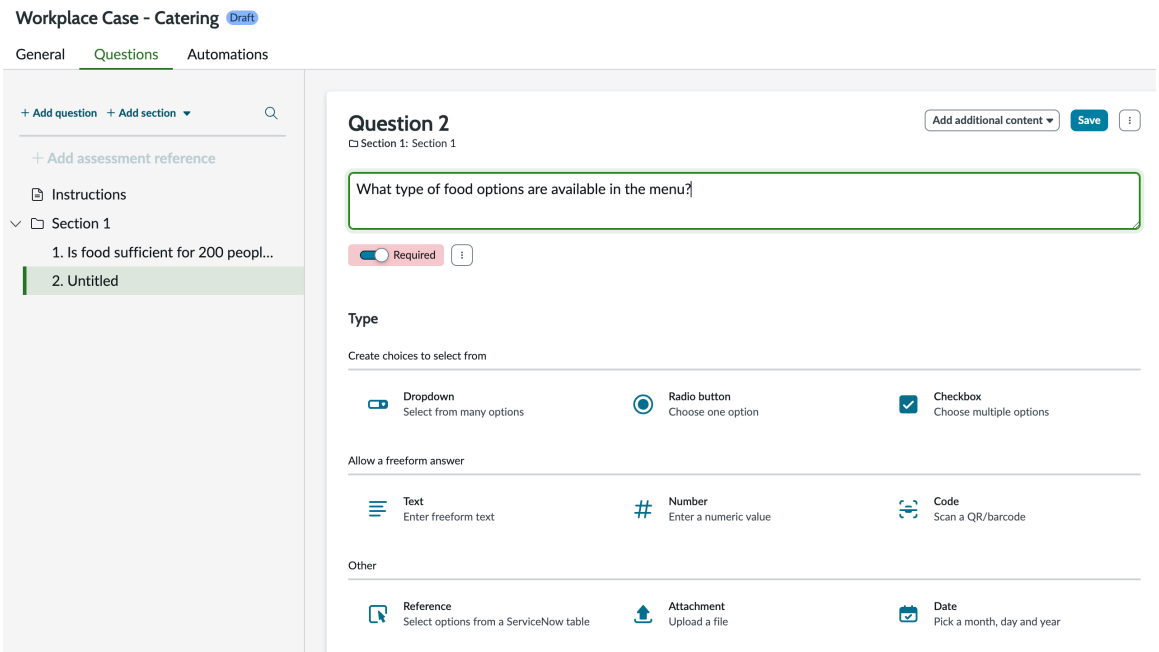
The Assessment Workspace page displays where you can specify the template details.

6. Under the General tab, do the following:
   a. Select **Details** and modify the assessment details if required.
   b. Select **Settings** and specify the **Duration (number of days)** and **Assessment reader role** details.
   c. Select **Save**.
7. Start building a template by adding instructions, sections, and questions under the Questions tab.
   a. Select **+ Add instructions** and define clear guidance for Workplace Agents explaining the purpose and expectations for completing the assessment.
   b. Select **+ Add section** and enter the **Name** and **Description** details.
   c. Select **+ Add question** and enter the question.

> **Note:** You must select an existing section or create a section to add a question.

- Toggle the Required configurable option to make the question conditionally visible.
- Select the response input type from the available options. For example, select Radio button and enter the Choices.
- Select **Add choice** to add multiple choices.
- Select **Add additional content** drop-down and select **Question description** or **Guidance** to add the additional details.
- Select **Save**.



   d. Select **+ Add assessment reference** and Add reference data to appear the card details under the Smart Assessments tab in a workplace case.

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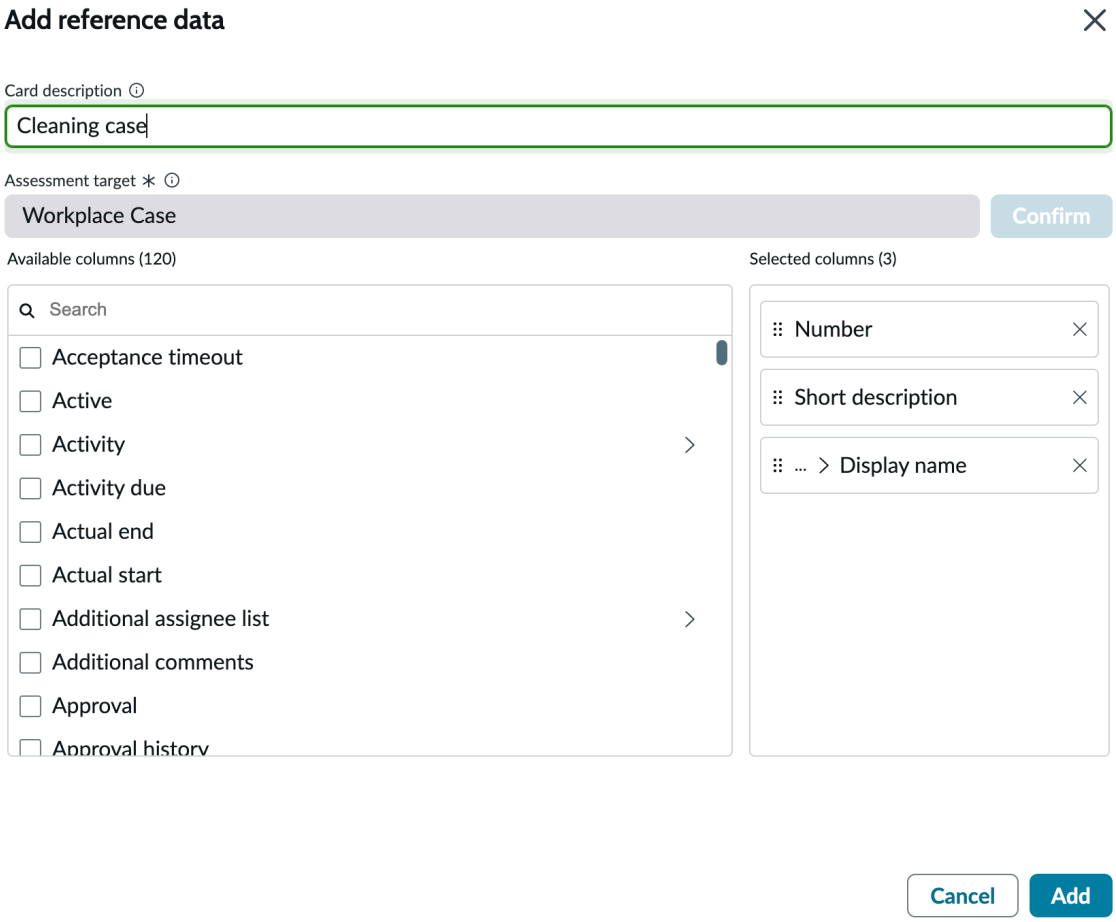
- In the **Card description** field, provide a description for the assessment reference card.
- Select the required columns and select **Add**.



8. Select **Publish** to publish the assessment template.

> **Note:** Templates must be published before they can be attached to triggers and used in workplace cases.

Configure Automations in Smart Assessment template

Set up automations to trigger predefined actions whenever assessment templates are published. You can define action set types that determine how and when automated actions execute within the assessment workflow.

Before you begin

Role required: admin

About this task

You can configure conditional action sets using if-then logic based on assessment responses, or create standalone action sets for unconditional execution to streamline case management workflows.

Procedure

1. Navigate to **Workspaces** > **Assessment Workspace**.
2. From the Assessment templates list, select the published template.
3. On the Assessment Workspace page, select **New template**.

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The Assessment Workspace page displays where you can specify the template details.

4. Under the Automations tab, select **Create automation**.
5. Enter the automation name and provide context.
6. Select **Create**.
7. Select **Add conditional action set** to define a group of conditions and actions.
   - Select **Set condition** in the If section, and select **New condition set**.
   - In the Set conditions dialog, define evaluation criteria:

     Select field

     Choose the field to evaluate.Navigate through Response based > Section to access assessment question responses, or select standard case fields.

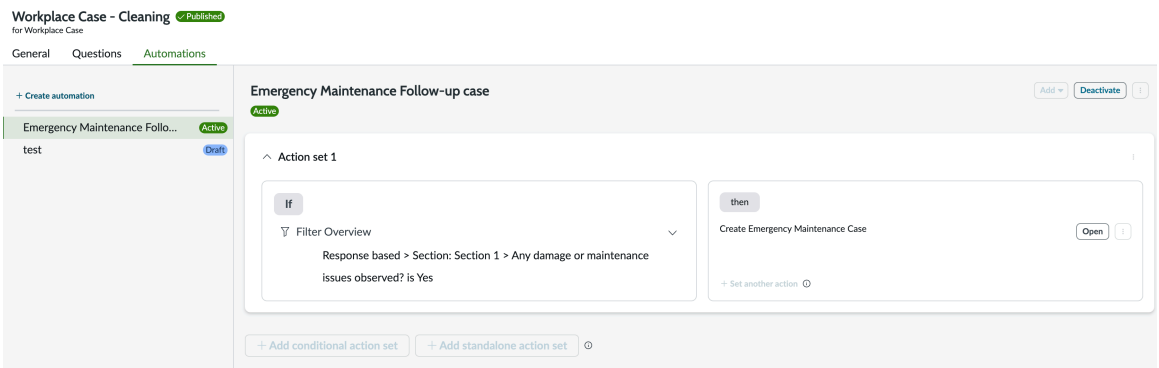
     Select operator

     Choose the comparison operator.

     Enter value

     Specify the value to compare against the selected field.

   - Use **and** or **or** to add more conditions.
   - Select **Save** to apply conditions
   - Under the then section, select **Set action** and configure the action to execute when conditions are met.
   - Select **+ Set another action** to add multiple actions that execute sequentially.
   - Configure if nothing matches behavior to define fallback actions when no conditions are satisfied.
8. Select Add standalone action set to execute actions unconditionally.
   - Under the then section, select **Set action** and configure the action to execute.
   - In the Set actions dialog, select Action type and the Workplace case details.
   - Select **+ Set another action** to add multiple actions that execute sequentially.
9. Select **Activate** to enable the automation.



Result

The automation is now active and will execute configured actions when the assessment template is published. Conditional action sets evaluate specified criteria before executing actions, while standalone action sets execute unconditionally.

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Note:

- To edit automation, select the automation, and select and select**Edit details**.
- To delete automation, select the automation, and select and select **Delete automation**.

Configure Smart Assessment Trigger

Smart assessment triggers define the conditions when assessment templates are applied to workplace cases or tasks.

About this task

Smart assessment triggers automatically create assessment instances when specific conditions are met on workplace cases or tasks. Conditions can be based on state changes, field values, or other criteria. You can also specify whether the assessment is mandatory and apply filters to target specific cases.

Before you begin

Role required: sn_wsd_case.manager

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Smart Assessment Triggers**.
2. On the Workplace Smart Assessment Triggers form, select **New** and fill in the form fields.

Smart Assessment Trigger Record

Field	Description
Name	Name of the smart assessment trigger record.
Description	Summary information about the assessment trigger condition record.
Table	The target table to run the trigger condition on. For example, Workplace case [sn_wsd_case_workplace_case].
Trigger condition	Conditions to set off the trigger: ○ Add Filter Condition: Field where the trigger conditions are added. ○ Add OR Clause: Field to add an optional clause for the trigger condition. For example, if you want to send an assessment whenever an incident closes, create the condition [State] [changes to] [Work in Progress]. These assessments automatically attach to cases and tasks based on configurable trigger conditions.
Mandatory	Check box that determines assessment must be completed before the case can be closed.

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Field	Description
	Note: Template must be closed before the case can be moved to one of the states in the **Close before** field.
Close before	Option to specify the case state that cannot be reached until the assessment is closed. For example, if you specify Closed complete, the Workplace Agent cannot close complete the case until the smart assessment instance is closed.

3. Select **Submit**.
   The record is added to the Workplace Smart Assessment Triggers record list.
4. Open the assessment trigger record and in the **Workplace Smart Assessment Template Mappings** section, select **New**.
5. In the **Smart assessment template** field, select the published smart assessment template that should be applied when trigger conditions are met.

Create and assign a workplace case with Smart Assessment

Workplace managers create a workplace case and assign it to workplace agents for various service requests such as cleaning, maintenance, or inspection tasks. When a case is moved to a specific state (for example, Work in Progress) and meets the configured trigger conditions, a smart assessment instance is automatically created and attached to the case.

Before you begin

Role required: sn_wsd_case.manager

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases**.
2. Select **All** to view all the workplace cases.
3. Select **New**.
4. On the form, fill in the fields.

Workplace cases form

Field	Description
Workplace service	The workplace service that matches your configured smart assessment trigger.
State	The state of a workplace case. Select the state to Work in Progress.
Assigned to	The Workplace agent who will complete the smart assessment. Select the agent from the list.
Requested for	The user on whose behalf the service is being requested.

5. Specify other field details.
   For more information, see View and track workplace cases.

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6. Select **Submit**.
   If the case matches the trigger conditions, a smart assessment instance is automatically created and the assessment is attached to the workplace case.

Access and Complete Smart Assessment

Workplace agents complete smart assessments as part of their case workflow. When a case has an attached assessment that meet configured trigger conditions, agents can open it directly from the case form, answer all required questions, and submit the assessment.

Before you begin
Role required: sn_wsd_case.workplace_agent

About this task
Workplace agent must open the case or task from **Workplace Central** > **Lists**. For mandatory assessments, agents must complete the assessment before they can close the case to one of the states in the **Close before** field.

Procedure

1. Navigate to your workplace agent workspace.
2. Open the assigned workplace case record from your work queue or case list.
3. Select **Open Smart Assessment** to launch the assessment interface.
   The system displays the assessment instructions, sections, and questions under the Smart Assessment Results tab.
4. Review the assessment instructions and complete all assessment questions by providing responses.

   Note: You cannot move the case state before completing the mandatory assessment.

5. Select **Submit** to complete and close the assessment.
   The system records all responses and marks the assessment as completed.

Automating seat assignment for new hires

Use HR Service Delivery and Workplace Service Delivery to automatically assign a seat for the new hires in your organization.

The automated seat assignment feature integrates Workplace Case Management and Journey designer to connect HR onboarding activities with workplace assignment. The pre-boarding activity in the onboarding lifecycle event contains an activity to automatically assign a workspace (seat or neighborhood) to new employees.

Configuration overview

To use the automated seat assignment feature, you must install plugins in the following order. You must have the System Administrator (admin) role to install plugins.

1. Install the Journey designer plugin along with its demo data.

   For more information about installing Journey designer, see Installation and configuration overview.

2. Install the Workplace Space Management plugin along with its demo data.

   For more information about installing Workplace Space Management, see Install Workplace Space Management.

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3. Configure a value for the *sn_wsd_core.ALLOCATION_TYPE* property.

   The system analyzes and assigns spaces based on the property value. For example, if the property is set to Cost Center, the system looks for a space with the same Cost Center as the new employee's manager.

   Note: This step is not required for neighborhood assignments.

4. Install the Workplace Case Management plugin.

   For more information about installing Workplace Case Management, see Install Workplace Case Management.

Note: If you have earlier versions of the plugins installed, update the Journey designer plugin and reinstall the demo data. Then update the Workplace Space Management plugin and reinstall the demo data.

Process overview

1. An HR manager or journey owner initiates an onboarding journey for a new employee. For more information about creating a journey, see Create a journey.
2. The hiring manager fills in basic information about the employee. For more information about journey view for a manager, see Journey view for a manager.
3. When the pre-boarding lifecycle event starts, the system creates a workplace case with the service `Workplace Location Assignment`. For more information about the Workplace Location Assignment service, see Workplace Location Assignment service.

   The employee and their manager can view the status of the workplace case from the Journeys page on the Employee Center.

   Note: To view workplace cases for employees, the manager must have the `sn_wsd_core.workplace_user` role.

4. The system analyzes the locations of the employee's team and assigns a location or neighborhood to the employee's profile.

   For neighborhood assignments, if the user qualifies for a neighborhood, the system closes the workplace case with a work note. the `Assign Users to Neighborhood` scheduled job assigns the profile to the neighborhood.

   For location assignments, the system follows the configured workplace service.

   If the system can't find a space or neighborhood for the employee, a manual assignment task is created. A case manager or agent can then assign a location to the employee.

5. After the space is assigned to the profile, the system sends an email to the employee and their manager with the location details.

Configure Approval options

Add approvers to approve cases created through Workplace services.

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Before you begin

Warning: Starting with Workplace Case Management version 1.8.2, the option to configure approval options has been moved to the core application Workplace Core version 2.9.2. To create or view approval options, navigate to **Workplace Core** > **Administration** > **Performer Criteria**.

- After the upgrade, the existing approvers are migrated from the Approval Option [sn_wsd_case_approval_option] table in the Workplace Case Management to the Workplace Performer Criteria [sn_wsd_core_performer_criteria] table in Workplace Core.
- The **Workplace Performer Criteria** has the same functionality as the Workplace Case Management **Approval** option. In addition, you can configure static approvers using the User criteria.

Ensure that you have the following details:

- Workplace Case table.
- User fields to select an approver from.

Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task

The ServiceNow® Workplace Case Management application provides the following default Approval options:

- **Manager**
- **Workplace location managed by**
- **Workplace location managed by group**

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Approval options**.
2. Click **New**.
3. On the form, fill in the fields.

Approval options form

Field	Description
Name	Name of the Approval option.
Case table	Case table for the option. Select the Workplace Case [sn_wsd_case_workplace_case] table.
User field	User or a user group to set as approver.
Application	Application for the option. This field is automatically set. Make sure the application is set to **Workplace Case Management**.
Active	Option to activate the approval option. Select this option.

4. Click **Submit**.

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Result
The Approval option is added and will be listed wherever approvals are configured.

Configure a Record producer

Make a Workplace service available to employees as a self-service option. Configure a record producer to display the service as a catalog item in the Workplace Services catalog.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Record producers**
2. Select **New**.
3. On the form, fill in the fields.

Workplace case management - record producer form

Field	Description
Name	Name of the record producer.
Table name	Workplace Case (sn_wsd_case_workplace_case) table that the record producer is associated with. **Note:** Make sure that the workplace case table for the record producer matches that of the associated workplace service.
Model	Product model table if relevant for the record producer.
Application	This field is already set to `Workplace Case Management`.
Active	Option to activate the record producer for use.
Preview link	Link to preview how the record producer appears to users in the Workplace Service Delivery catalog
Expand help for all questions	Select this option to enable users to expand help for all questions.

4. Fill the following related lists fields appropriately:
   - **What it will contain**
   - **Accessibility**
   - **Generated Record Data**
   - **Portal Settings**
5. In the **What it will contain** related list, provide the following script:

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```
new sn_wsd_case.WSDServiceUtils(current,
 gs).createCaseFromProducer(producer, cat_item.sys_id);
```

6. In the **Variables** related list, configure the variables for the Workplace Services catalog item as appropriate.

   Variables collect information from the user, and are used to ask questions and map answers to fields. You can add as many variables as you need to the Workplace Services catalog item. Commonly used variables types include:

   - Checkbox
   - Multiple Choice
   - Reference
   - Select Box
   - Single Line Text

   To learn more about the different types of variables and how to configure them, see Types of service catalog variables Types of service catalog variables.

7. Select **Submit**.

Result
The record producer is created.

What to do next
Link the record producer to the workplace service, see Create a Workplace service.

Configuring a record producer for request edit

Configure a record producer for editable workplace service requests.

The request edit feature in Workplace Service Delivery lets users modify the details of their submitted requests. Cases that are created with record producers on the Workplace Case or Workplace Case Extension tables can be edited, keeping records current and accurate.

To configure the edit functionality of a record producer, follow the steps in the following sections.

Creating a record producer

You must first create a record producer on the Workplace Case or Workplace Case Extension tables, then map it to the **Record Producer** field of a Workplace Service. For more information about creating a record producer, see Configure a Record producer.

If you want to integrate the record producer with Workplace Reservation Management, see Configuring a record producer for reservation.

Enabling the edit functionality

You can enable the button by selecting `Case` or `Case and Reservation` in the **Available for** field, then selecting the **Allow request modifications** field of the workplace service.

When the **Allow request modifications** option is enabled on a workplace service, users see the **Edit request** action in the request summary page for all the record producers associated with that service.

For more information about the fields of a workplace service, see Workplace Service form.

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Redirecting to the Case Editor page

When users select the edit request option for their request, they're redirected to the WSD Case Editor page, which looks like the record producer to provide a familiar interface for users.

After making their changes, users can save the updated case, which makes the following changes:

- The Workplace Case record is updated with the new values provided by the user.
- New service item requests are created based on the updated case information, if necessary.

Configuring the record producer for editing

Handling variables with default values on load

Condition

Variables that have default values on load can cause data inconsistency on the edit page. The edit page must fill variables based on the submitted request.

For example, the system tries to populate the logged-in user in the Requested for field instead of picking the data from the submitted request.

Remedy

While setting the default value for any variable, ensure that it only applies to the new request submission. You can use the `id` parameter from the page URL in the client scripts to determine whether it's a request submission page or an edit page.

For more information, refer to any record producers installed with Workplace Case Management, like `Catering`.

Triggering an event on submission

For the edit page, you must trigger the `wsd.serviceEditor.onSubmit.success` event in the `onSubmit` catalog client script (last executable script) of the record producer with the parameter `success: true`. Ensure that the last executable client script has the **UI type** field set to `All`.

Triggering the event makes sure that all the onSubmit client scripts are validated and that the updated variable data can be used to update the case record.

For more information, refer to any record producers installed with Workplace Case Management, like `Catering`.

Using custom widgets in the record producer

Condition

To use custom widgets in the record producer, ensure that the widget can pre-fill data based on the submitted request. The reference for the widget can be taken from the Workplace Service widget.

Remedy

Ensure that if you are on the edit page, you can use the `sys_id` parameter from the URL to get the sys_id of the submitted request. Use the sys_id to retrieve the case data and populate the existing data on the widget during the first load.

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Alternatively, you can use the following variable sets that are installed with Workplace Case Management:

- For both item and space selection in the request, use the `Workplace Service widget Variable set`.
- For only space selection, use the `Multilevel space picker widget variable set`.

Configuring a record producer for reservation

Configure a record producer to integrate it with Workplace Reservation Management.

Integrating a record producer with Workplace Reservation Management provides administrators with flexible choices to handle service requests. If a record producer is mapped to the **Record producer for reservation** field in a workplace service, it's displayed to users during the reservation process. If no record producer is mapped, the system displays a custom widget for service item requests.

The dual approach with a record producer and a custom widget provides a streamlined and unified experience:

- Using a record producer automatically populates and hides fields with known data from the reservation context like requested for, date and time, space details. It makes sure that users only provide the necessary information, simplifying the process and improving data accuracy.
- Using the custom widget maintains backward compatibility for workplace services that don't have a record producer.

Enabling a record producer for editing

You must first create a record producer on the Workplace Case or Workplace Case Extension tables and configure it for editing. For more information, see Configuring a record producer for request edit.

For more information about creating a record producer, see Configure a Record producer.

While creating the record producer, make sure that you follow these steps.

Important: If you don't follow these steps, the record producer doesn't load correctly on the reservation portal.

- You must use the `Workplace Service widget Variable set` in your record producer to ensure that space selection and service item selection widgets are included and function correctly.

  The variable set includes the following widgets:

  - WSD Multilevel Space Picker: The widget used to select building, floor, and space information.
  - WSD Workplace Service: The widget used to select specific service items.
- You must adhere to specific names for the variables so the system can automatically pass data from the reservation to your record producer. These variables are populated with known data from the reservation and are typically hidden on the form.

  Make sure that you use the specified names for the following variables:

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- **Requested for**: requested_for
- **Date and time requested by**: delivery_time
- **Urgency**: urgency
- **Impact**: impact

Note: Ensure that you include a record producer variable with the field name `reservation`. Otherwise, the reservation case isn't linked to the child case generated.

- Sections like request details and space selection are hidden on the request form as they're derived from the reservation data. For more information, refer to any record producers installed with Workplace Case Management, like `Catering`.

Mapping the record producer to the reservation page

To map the record producer to the reservation page, you must first add it to the **Record producer** field of the workplace service. You must then add it to the **Record producer for reservation** field of the same workplace service.

For more information about the fields of a workplace service, see Workplace Service form.

Create an SLA Definition

Configure SLAs to ensure that cases are resolved according to the expectations of customers. SLAs set up performance parameters, such as specifying minimum uptime or the amount of time that a task needs in order to reach a certain condition.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task
Create an SLA definition and use it in Workplace cases. An SLA definition record defines the timings, conditions, workflows, and other information required to create and progress task SLAs. For more information, refer to Service Level Agreement (SLA) definition.

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **SLA Definitions**.
2. Create an SLA Definition or modify an existing one.
   - If you are creating an SLA Definition, click **New**.
   - If you are modifying an existing SLA Definition, open the desired SLA Definition.

   For information about the template form fields, see Create an SLA Defintion.
3. In the **Table** field, select the **Workplace Case [sn_wsd_case_workplace_case]** table.
4. In the **Flow** field, select **Default SLA flow**.
5. In the Application field, ensure **Workplace Case Management** is selected.
6. Click **Submit**.

Result
The SLA Definition is created.

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Create a Workplace service

Create a workplace service with predefined steps of fulfillment. Select the fulfillment type required based on the workplace service. Create workplace services like catering, office supply request, parking, or any service to support employees needs.

Before you begin

Ensure that you have the following details:

- Task templates and Case templates to link it to the workplace service.
- Record producer to which the workplace service must be linked.
- Active flows in case you want to create workplace service flow.

Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task

Create a workplace service and specify how the workplace service must be fulfilled. You can choose to fulfill the workplace service manually, by triggering a series of tasks, i.e, by a service activity or using a flow. Specify the following for the workplace service:

- Name of the workplace service. The workplace service is displayed at all locations with this name.
- The fulfillment type like manual, service activity, or flow.
- Specify from where you want to enable users to order. That is, specify if users can order through a workplace service request or while making a reservation or both.
- Specify if an employee can request more than one workplace item that belongs to the same category.
- Select a template to prefill certain values when creating a workplace case or a workplace task.
- The record producer to which you want to link the workplace service if you want to make it available. The workplace service can be requested only through a record producer created in the Workplace Case Management application.
- Description about the workplace. You can enter a brief description about the purpose of the workplace service. You can enter a regular text or an HTML text.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select **New**.
3. On the Workplace service form, fill in the fields.
   For a description of the field values, see Workplace Service form.
4. Select **Submit**.
5. **Optional:** On the Workplace services list, set the order for the workplace services.
   Workplace services are displayed on the raise a request or create a reservation page based on the order. Services with a lower order are displayed first. Services with the same order number are displayed alphabetically.

   Note: If a Workplace Service has an empty order field, it's considered to have an order of zero.

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Result
The workplace service is created and is requested whenever the associated record producer is selected. If you want to create a workplace service activity for the workplace service, refer to Create a Workplace service activity.

Create a Workplace service activity

Create a Workplace service activity to trigger a background activity when a Workplace service is selected. The activity can be an approval action, task, or a child case.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager
Ensure that you have the following details:

- Task templates and Case templates to link to a workplace service activity.
- A workplace service with fulfillment type selected as **Service activity**. For more information, see Create a Workplace service.

About this task
Activities can be approvals, tasks, or child cases. You can specify the order in which these activities must be triggered.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select the workplace service that you want to modify to add more workplace service activities.
3. Select **New** under the **Workplace Service Activities** section in the **Workplace services** form.
4. On the form, fill in the fields.

Workplace service form fields

Field	Description
Name	Enter a name for the service activity.
Activity type	Select the type of service activity that you want to create: ○ **Approval**: Creates an approval activity. ○ **Task**: Creates a task activity. ○ **Child case**: Creates a child workplace case. ○ **Execute service item**: Executes the tasks or cases created for workplace service items ordered by an employee along with the workplace service. For more information, see Add a workplace service item to a workplace service. ○ **Automated task**: Creates an automated task that will be closed without any manual intervention.
Missing all approves	This field appears if you select the **Activity type Approval**. From the list of options, select what action to take if approvers are missing.

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Field	Description
Wait for	This field appears if you select the **Activity type Approval**. Select the type of approval required to close the case. From the options, select whether any approver can approve, all approvers must approve, or if the first response from any approver is an approval. Point to the options to view more details.
Application	Make sure that **Workplace Case Management** is selected.
Parent service	Option to add a parent Workplace service.
Order	Specify an order for this activity. Depending on the order, the service activity is initiated. **Note:** You can specify only one Service Activity of type **Approval** in a single order.
Approvers	This field appears if you select the **Activity type Approval**. Select approvers for the case from the configured performer criteria. Select unlock to select.
Workplace case service	This field appears if you select the **Activity type** as **Child case**. Select the search and select the workplace service you want to set as a child case. To add a workplace service, see Create a Workplace service.
Continue if incomplete	Select this option if you want this activity to continue when the activity is closed or incomplete.

5. **Optional:** Enter the conditions in the condition builder that you want to trigger the background activity.

   Example
   For example, a task for the activity will be created only when the condition matches the case record.
   In releases prior to the Quebec release, fields had to be selected from the Workplace Case [sn_wsd_case_workplace_case] table and service catalog variables such as questions could not be referenced.

6. Select **Submit**.

Result

The Workplace Service Activity is created and will be executed when the parent Workplace service is requested.

Add a workplace service item to a workplace service

Configure a workplace item that an employee can order along with a workplace service request or as part of the reservation. For example, while making a reservation, an employee can order a workplace service item such as catering, an additional chair, whiteboard, marker, and more.

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Before you begin

Role required: sn_wsd_case.manager

About this task

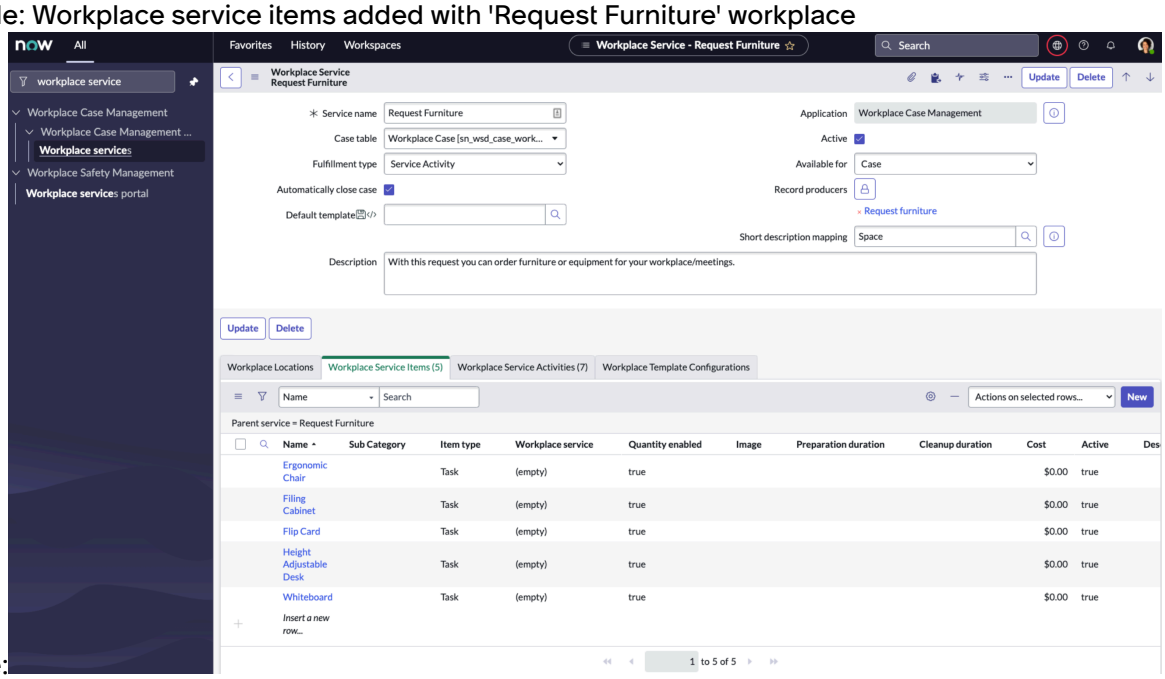
Add a workplace item to make it available for employees to order when they make a workplace service request. Specify the following details related to the workplace item:

- Specify a name for the workplace item. The item is displayed to the employees with the specified name.
- Select a template to prefill certain values when creating a workplace case or a workplace task.
- The parent workplace service to which you're adding the workplace item.
- The subcategory to which the item belongs.
- An image describing the workplace item. The image is displayed to the employees while they're making a selection. The image is displayed to the customers while using the Reservation portal and Workplace Reservations for Microsoft Outlook Add-in.
- A brief description about the workplace item. The description is displayed to the employees while they're making a selection. You can add a normal text or an HTML text. The description can contain a text and a link. If you enter a long description, the text is displayed to the employees along with a **Show more** option. The description is displayed to the customers while using the Reservation portal and Workplace Reservations for Microsoft Outlook Add-in.

  Note: The Workplace Reservations for Microsoft Outlook Add-in doesn't inform about the services in lead time instead the services aren't requested when the reservation gets submitted.

- Cost of the workplace item. You can select the applicable currency based on your location.
- Time duration required to prepare the item and clean up the item. You can specify the time in days and or hours.
- Specify if you want to enable employees to specify their required quantity or capacity.
- Configure the locations where the workplace service item shall be available.

Example: Workplace service items added with 'Request Furniture' workplace service:



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Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select the workplace service to which you want to add a workplace service item.
3. On the form, scroll down to the Workplace Service items related list.
4. Select **New**.
5. On the form, fill in the fields.

Workplace Service item form

Field	Description
Name	Name of the workplace service item.
Item type	Type of workplace service activity that must be generated for this workplace service item when an employee makes an order. Choices are as follows: ○ **Case**: Option to generate a child workplace case to fulfill this item. ○ **Task**: Option to generate a child workplace task to fulfill this item. ○ **Manual**: Option to generate a manual fulfillment workplace service to fulfill this item.
Workplace service	The workplace service that you want to set as a child case to fulfill the item. This field appears only if **Case** is selected from the **Item type** field.
Task table	The task table that must be used to create a child workplace task to fulfill the item. This field appears only if **Task** is selected from the **Item type** field.
Default template	The default task template to fulfill the task. For more information, refer to Create a Workplace task template. This field appears only if **Task** is selected from the **Item type**.
Application	Application of the service item. This field is automatically set. ○ If you're adding the workplace service item for a workplace case-related service, select**Workplace Case Management**. ○ If you're adding the workplace service item for a workplace service that is available for employees while making a reservation, then select **Workplace Reservation Management**.
Parent service	The workplace service to which you're adding this activity. This field is automatically set.

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Field	Description
Sub Category	Sub category to which the workplace item belongs. A list of subcategories is available from which you can select.
Active	Option to activate the workplace service item.
Image	Image describing the workplace service item. The image is displayed to employees while making a selection.
Description	Brief description about the workplace service item. The description can be in a normal text or an HTML text.The description is displayed to Workplace Reservation Management users while making a selection. The description can contain a text and a link. The description is displayed to the customers while using the Reservation portal and Workplace Reservations for Microsoft Outlook Add-in.
Quantity enabled	Option to enable specify their required quantity from **Default Configuration**.
Capacity enabled	Option to enable employees to specify a capacity from **Default Configuration**. The maximum capacity that is specified for the selected workplace location is used as the maximum capacity limit. To specify a maximum capacity, change the **Max capacity** field of the workplace service item location. **Note:** If the Workplace Service item isn't assigned to any location, there are no capacity restrictions.
Cost	Cost of the workplace item. To specify the currency of the cost, select the currency from **Default Configuration**.
Preparation duration	Time required to prepare the item, if needed.
Cleanup duration	Time required to clean up the item, if needed.
Lead time for ordering	Time provided for the service team for preparing or arranging the service item. Configuring **Lead time for ordering** restricts in adding any extra service items to a reservation, when the service is within the lead time. This option is enabled at service item and service location level. If a user changes the date of a reservation or a case and the new date is within the lead time, the system displays an error specifying the lead time of the service item. Service

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Field	Description
	items that are within the lead time can't be modified while editing a reservation.
Restrict cancellation of requested services	Option to restrict employees to cancel the requested services.

6. Select **Submit**.

Result
The workplace service item is added to the workplace service. An employee can order the workplace item while requesting the workplace service.

Important: While adding a service item to a reservation, if the item is within the lead time, then that service item doesn't appear in the items list.

A regular employee can’t remove any service items to an existing reservation in the following scenarios:

- When a reservation is arranged
- When the service items are within the **Lead time of ordering**
- When the **Restrict cancellation of requested services** option is enabled

Employee can move a reservation to another date or time. While moving, if one or more services collide with the Lead time for ordering, then the employee is informed.

The employee shouldn't be able to remove any services that are being prepared or arranged.

The employee is informed if there are one or more services in the lead time while saving the reservation.

Note: Canceling a reservation cancels the requested service, even when the service item is restricted from cancellation.

What to do next
Specify the workplace locations where the workplace service item is available for ordering. For more information, see Make a workplace service item available to a workplace location.

Make a workplace service item available to a workplace location

Make a workplace service item available to specific workplace locations. Select any workplace location such as a region, site, campus, building, floor, area, or a space.

Before you begin
Role required: sn_wsd_case.manager

About this task
Select workplace locations where the workplace item must be available. Employees can order the item while making a workplace service request. Select a parent location such as a region, site, or a campus. You can also select child locations such as a building or its spaces.

- You can specify different configurations like costs and durations for different workplace locations by creating multiple Workplace Service Item Location records.
- The Workplace Service Item configurations like cost and duration for a selected workplace location are also applied to the child workplace locations.

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  - If the workplace item has different configurations specified for the parent and child workplace locations, the configuration of the child location is applied instead of the parent location. For example, if the cost of the workplace item as $100 for the region ABC and the cost for the workplace item the campus XYZ is $75, the cost of the child workplace location ($75) is applied.
  - If a workplace item does not have a configuration specified for a workplace location, the default configuration from the workplace service item record is applied. For example, if the cleanup duration of the Workplace Service Item is 15 minutes and the cleanup duration for a workplace location is not specified, the 15 minute cleanup duration is applied.
- If the workplace service item isn't assigned to any location, the availability of the item depends on the availability of the workplace service. You can view the details of the workplace locations where the workplace service is available in the Workplace locations related list.
- The availability of a workplace service item depends on the locations specified in the workplace service location and the workplace service item location.
  - If there is no workplace service location and no service item location specified for a Workplace service, the workplace service items are available to all locations.
  - If a workplace service location is specified for a Workplace service and no service item location is specified, the workplace service items are available to the specified location and child locations specified in the Workplace service locations related list.
  - If you specified location A for the workplace service and specified location B (not in the hierarchy of location A) in the workplace service item location (in Workplace Service Item Locations related list of the workplace service item), then the following actions are performed when an employee raises a workplace service request:
    - If the employee raises the request for location A or any locations in the hierarchy of location A, then all the workplace service items that are available to location A, except items available to location B are displayed.
    - If the employee raises the request for location B or any locations in the hierarchy of location B, then no workplace service items are displayed.

    The same logic is applied while displaying workplace service items associated with workplace spaces in general.

    Configuring **Lead time for ordering** restricts in adding any extra service items to a reservation, if it is within the lead time for ordering.

    Restrict cancellation of requested services restricts employees to cancel the requested services.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select the workplace service in which the workplace service item is added.
3. On the form, scroll down to the Workplace Service items related list.
4. Select the workplace service item that you want to assign to a workplace location.
5. On the form, scroll down to the Workplace Service Item Locations related list.
6. Select **Edit**.
7. Select and move the service.

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a. On the Edit Members form, select the service.
b. From the **Collection** column on the left, select the workplace location.
c. Move the workplace location to the **Workplace location List**.

8. Select **Save**.
9. **Optional:** Change the cost of the item for a particular workplace location.
   a. On the form, scroll down to the Workplace Service Item Locations related list.
   b. Select the preview to preview the workplace location.
   c. In the preview dialog box, select **Open record**.
   d. On the form, edit the **Cost** field.
   e. Select **Update**.

Result

The workplace service item is available to order at the specified locations. The cost of the workplace item at a location depends on the cost specified on its nearest workplace location in the workplace location hierarchy.

Create a workplace template configuration

Define a template that must be applied to fulfill a workplace case. Set conditions based on common employee responses for requests. The template will be applied to those workplace cases that match the conditions specified.

Before you begin

Role required: admin

About this task

Create a template and configure the conditions that a workplace case must match so that the template is applied. If the conditions don't match, then the default template that is specified in the workplace service is applied.
A Workplace template configuration can be directly applied to a workplace service or a workplace service activity.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select the workplace service to which you want to add a Workplace template configuration.
3. On the form, scroll down to the Workplace Template Configurations related list.
4. Click **New**.
5. On the form, fill in the fields.

Workplace Template Configuration form

Field	Description
Configuration table	Configuration table of the workplace service.
Configuration document id	Configuration id of the workplace service.
Template	Template that must be applied to the workplace service or the workplace service activity.

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Field	Description
Application	Application of the template. This field is automatically set. Ensure that **Workplace Case Management** is selected.
Active	Option to activate the Workplace template configuration.
Order	Order of the template.
Table	Workplace case table that is used to apply the template.
Condition	Conditions that must be met to apply the template. Use the **AND**, **OR**, and **New criteria** options to build conditions. After you create a condition, click **Preview** to preview the number of records that match the conditions.

6. Click **Submit**.

Result
The Workplace template configuration is added. The template will be applied to those workplace services or workplace service activities that match the specified condition.

Create a workplace field mapping

Create a field mapping record to copy the field information of a parent case to the child workplace service activities or to workplace item-related tasks. Skip the process of re-entering the same details of a parent case to a child case by using field mapping records.

Before you begin
Role required: sn_wsd_case.manager

About this task
Save time from manually entering details in a child case or task triggered by a parent workplace case. The Workplace Service Activity Field Mapping or Workplace Service item Field Mapping enables you to copy the details specified in a parent case's field to its child cases and tasks. This option is available only for the workplace services of the type Workplace Service activity and for tasks or cases triggered by a Workplace Service item request. You must create individual field mapping records for each field mapping.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select the workplace service to which you want to apply the field mapping.
3. On the form, scroll down to the related list section.
4. Select the related list where you want to add a field mapping record.
   - Workplace Service item: Select this related list to add a field mapping record to a workplace service item.
   - Workplace Service Activities: Select this related list to add a field mapping record to a workplace service activity.
5. Based on the select related list, select the Workplace service item or the Workplace Service Activity to which you want to add a field mapping.

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6. On the form, scroll down to the related lists section.
   If you selected Workplace service item, then the Workplace Service item Field Mapping related list appears. If you selected a workplace service activity, then the Workplace Service Activity Field Mapping related list appears.
7. Select the relevant related list.
8. Click **New**.
9. On the form, fill in the fields.

Workplace Field Mapping form

Name	Name of the field mapping.
From / Condition table	Table that is used to copy fields and build conditions.
Map from field	Field from which the value must be mapped.
Active	Option to activate the mapping.
Map to table	Table to which the field details are copied.
Map to field	Field to which the value is copied.
Order	Order in which the field mapping must be performed when there are multiple field mappings.
Condition	Conditions that must be matched to apply the field mapping. Click **New criteria** to add conditions.

10. Click **Submit**.

Result
The field mapping record is added.

Configure an escalation rule

Escalate a workplace case to the relevant assignment group by using an escalation rule.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Escalation rules**.
2. Click **New**.
3. On the form, fill in the fields.

Case Tier Escalation form

Field	Description
Escalate from	Assignment group from which you want to escalate the workplace case.

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Field	Description
Escalate to	Assignment group to which you want to escalate the workplace case.
Domain	Domain of your application. This field is automatically set to your application domain.

4. Click **Submit**.

Result
The escalation rule is created. The rule is displayed under the Related links of those workplace cases that have the assignment group (specified in **Escalated from**) for which the rule is created.

Add Fulfillment instructions

Provide instructions to workplace agents on how to fulfill a workplace case. Add instructions for new workplace agents and for complicated workplace cases.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager

About this task
Add instructions for fulfilling a workplace case.

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Fulfillment instructions**.
2. Select **New**.
3. On the form, fill in the fields.

Fulfillment Instruction form

Field	Description
Name	Name for the fulfillment instruction.
Table	Table containing workplace cases. The field is automatically set to the `Workplace Case` table.
Condition	Conditions that a workplace case should satisfy before you implement the fulfillment instruction. The instruction appears in the workplace case records which match this condition. ○ To add a condition, select **Add Filter Condition**. ○ To add an "OR" condition, select **Add "OR" Clause**.
Active	Option to activate the fulfillment instruction.
Order	The order in which the instruction is followed when there are multiple fulfillment instructions for a workplace case record.

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Field	Description
Instruction	Fulfillment instructions to follow. Use the formatting options to change the style of the content.
Knowledge articles	Knowledge article to support the instructions. Select the unlock knowledge articles icon () to add an article. Select the lookup icon () to search for an article.

4. Select **Submit**.

Result
The fulfillment instruction is added. The instruction is displayed in the workplace case records that match the specified conditions.

Group similar workplace cases under a parent case

Categorize cases that have similar issues and that require the same resolution under a single parent case. Reduce the time spent on resolving multiple workplace cases.

Before you begin
Role required: sn_wsd_case.admin or sn_wsd_case.manager or sn_wsd_case_workplace_agent

About this task
Assign a workplace case to a parent workplace case. The resolution provided to the parent case will also be applied to the child case.
You can also assign a case to a parent case even if the **State** field of the parent is set as Canceled or Closed Complete. When the case is assigned, the state of the child case is automatically updated as Canceled or Closed complete.

The following scenarios can occur when you assign a parent case:

- You can view all the cases associated to a parent case in the **Related Cases** tab.
- The child case is updated whenever the parent case is updated. Updates like comments, work notes, and state changes are automatically applied to the child case. If the state of the child case is set as Canceled, the updates will no longer be applied. If you do not want to copy the comments, work notes and state changes to the child cases, you can set the *`Update Child Case - Work Notes & Comments`* to **False**.
- State changes in the parent case are copied to the child case, except for state changes to Awaiting acceptance.
- Any updates individually made on the child case will not be applied to the parent case.

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases**.
2. Select one of the following modules:
   - All
   - Open - Unassigned
   - Open

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- Assigned to my group
- Assigned to me

3. Select the workplace case to which you want to assign a parent workplace case.
4. In the **Parent case** field, select the workplace case that you want to assign as a parent.

> **Important:** Do not select a child case as a parent case. Otherwise, the case will encounter looping. For example, if WCASE0001001 is parent of WCASE0001002 and WCASE0001003, then WCASE0001002 and WCASE0001003 can't be parent of WCASE0001001.

5. Click **Save**.

Result

The workplace case is assigned to a parent case.

> **Important:** The case selected in the **Parent case** field and the case displayed in the **Parent** field are different. The workplace case displayed in the **Parent** field is generated from the workplace service to which the case is associated. A parent is assigned automatically if the **Activity type** of the workplace service is **Task** or **Child case**.

Requesting a workplace service

Raise a general enquiry or any workplace improvement-related services.

> **Note:**
>
> > **Note:** While submitting a request for a workplace service from Workplace Reservation Management to Workplace Case Management, user needs to allow the "sys restricted caller access".

Reconfigure an office space

Provide details on how an office space should be reconfigured.

Before you begin

> **Important:** Starting with Workplace Core (sn_wsd_core) version 2.1, all updates and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.workplace_user

About this task

Raise this request to rearrange your office space. Specify any extra information needed by the team responsible for the reconfiguration.
You can also raise a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace**. Select **Reconfigure an office space** and **Submit** the request after you fill the form.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. Open the **General** category where the workplace service is located, do the following:

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a. Click **Catalog**.

b. Click **Browse by Categories**.

c. In the Workplace Services Catalog, select **General**.

> **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.

3. Select **Reconfigure an office space**.
4. On the form, fill in the fields.

Reconfigure office space form fields

Field	Description
On behalf of	Name of the requester who is requesting to reconfigure.
Region	Region of your office location.
Site	Location of your office.
Campus	Campus of your office building.
Building	Office building of your space.
Floor	Floor of the area or space that you want to reconfigure
Area	Area of the space you want to reconfigure.
Space	Office space you want to reconfigure.
Is there anything else we should know?	Extra information about the reconfiguration you are requesting.

5. **Add attachments** if required.
6. Click **Submit**.

Result
Your request is submitted.

What to do next
You can check the details of your request or choose to cancel it anytime using the Workplace Service Portal or the Now Mobile app. Click **Cancel Request** to cancel the request.

- On Workplace Service Portal, go to the Requests tab to view your requests and reservations.
- On the Now Mobile app's navigation bar, tap **For Me** and scroll down to the My Request section to view your requests.

When the request is resolved, select **Accept** or **Reject** based on the resolution received.

Raise help request for a workplace inquiry

Submit a general workplace service request for issues that need a human response. Request help for issues that are not covered by current automated workflows.

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Before you begin

Important: Starting with Workplace Core (sn_wsd_core) version 2.1, all updates, and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.workplace_user

About this task

About this task

Request a workplace-related help or raise an issue about anything related to the workplace.

If the workplace has a QR code available, you can scan the QR code and submit your request.

You can also submit a general question using the Virtual agent chat support. From Employee Center portal, select the chat option . Type your question or select **Show Me Everything** to choose from the list of options to submit your query.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.

   Note: You can also raise a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service.

2. Open the **General** category.

   a. Click **Catalog**.

   b. Click **Browse by Categories**.

   c. In the Workplace Services Catalog, select **General**.

      Note: If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.

3. Click **Submit a general request**.
4. In the **What can we help you with?** field, enter your query or issue.
5. **Add attachments** if required.
6. In the **What area needs attention**, specify the location details for which you are raising the request.
   If the Workplace Space Mapping plugin is installed, you can also click the **Find the space on a floor map** option to select the space directly on the map.

   If employees have a permanent assignment in their workplace profile, the employee names are displayed on the map for a selected space. For more information, see Display permanent seat assignments on floor maps.

   a. In the **Location** field, select the building where the space is located.

   b. In the **Floor** field, select the floor where the space is located.

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c. In the **Space type** field, select the type of space.

d. In the **Space name** field, select the space.

7. Click **Submit**.

Result
Your request is submitted.

What to do next
Depending on your platform, do one of the following to view your requests:

- On the Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
- On the Now Mobile app's navigation bar, tap **For Me** and scroll down to the My Request section to view your requests.
- In the virtual agent chat, type your question or select **Show Me Everything** to select from a list of available options.

If you want to cancel a request, Click **Cancel Request**.

When the request is resolved, select **Accept** or **Reject**.

Raise a move request for a space change

Create a move request to relocate to another space. Specify why you want to move and when you want to move. You can select a space that is located in your current building or at a different building. You can also select a desk directly on the floor map.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure
1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. Open the **General** category where the workplace service is located, do the following:

   a. Click **Catalog**.

   b. Click **Browse by Categories**.

   c. In the Workplace Services Catalog, select **General**.

   > **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.

3. Select **Request a desk change**.
4. On the form, fill in the fields.

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Request a desk change form

Field	Description
Employee name	Name of the employee for whom you are raising the move request. If you are raising the request for yourself, select your name.
When is the requested move date?	
Date	Date on which the movement must be completed. Select a date from the calendar.
Select a move reason	Reason for moving from the current location. Select from the list of available reasons.
From:	
Find a space on a floor	Option to directly select the current space on the floor map.
Building	Building in which the current desk is located.
Floor	Floor on which the current desk is located.
Space	Space in which the current desk is located.
To:	
Find a space on a floor	Option to directly select the new target desk on the floor map. If employees have a permanent assignment in their workplace profile, the employee names are displayed on the map for a selected space. For more information, see Display permanent seat assignments on floor maps.
Building	Building in which the target desk is located.
Floor	Floor on which the target desk is located.
Space	Space in which the target desk is located.
What should be moved?	Items to be moved from the current desk to the new target desk.
Anything else we should note?	Extra information regarding the move request.
Add attachment	Attached files that support the move request if required.

5. Click **Submit**.

Result

The move request is submitted.
If the state of the move request is Closed complete, it means that the move request has been completed successfully. If the state is set to Closed incomplete, it means that the move request could not be completed due to various reasons. You can raise another request if required.

Depending on your platform, do one of the following to view your requests:

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- On the Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
- On the Now Mobile app's navigation bar, tap **For Me** and scroll down to the My Request section to view your requests.
- In the virtual agent chat, type your question or select **Show Me Everything** to select from a list of available options.

If you want to cancel a request, Click **Cancel Request**. When the request is resolved, select **Accept** or **Reject**.

Request furniture for a space

Order furniture or equipment for your workplace or for any event.

Before you begin

Role required: sn_wsd_case.manager

About this task

Use the **Request furniture** workplace service to request a piece of furniture or equipment, such as a chair, a table, adjustable desk, cabinet, flip card, white board, or other items.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. To open the **General** category where the workplace service is located, do the following:
   a. Click **Catalog**.
   b. Click **Browse by Categories**.
   c. In the Workplace Services Catalog, select **General**.

   Note: If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.
3. Select **Request furniture**.
4. On the form, fill in the fields.

Request furniture form

Field	Description
Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Find a space on a floor map	Option to select a space directly on the floor map. If employees have a permanent assignment in their workplace profile, the employee names are displayed on the map for a

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Field	Description
	selected space. For more information, see Display permanent seat assignments on floor maps.
Building	Building that has the space for the requested furniture.
Floor	Floor that has the space for the requested furniture.
Space	Space for the requested furniture.

5. In the Add Furniture section, click **Add**.
   You can request more than one piece of furniture. Click **Add** to add more pieces of furniture.
6. In the **Select Furniture** field, select the furniture that you want to request for your space.
   The availability of the furniture depends on the configuration set by the workplace manager for the workplace location.
7. In the **Quantity** field, specify the required quantity.
   The **Cost** field is automatically calculated depending on the selected furniture and the quantity specified. The cost also depends on the cost defined by the workplace manager for the selected location.
8. Click **Add**.
   The furniture is added to the request.
9. **Optional:** In the **Is there anything else we should know?** field, specify any instruction or extra information if required.
10. **Optional:** Select **Add attachments** to attach any files of required.
11. Click **Submit**.

Result

The furniture request is submitted.
The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

Raise a space assistance request

Submit a workplace service request to get space allocation recommendations using the Workplace Service Portal. The Workplace Service Delivery space assistance provides you with the best space allocation plan options based on the space quantity and the department that you specify. You can select the most suitable allocation or none. Depending on your selection, the Space planner deploys the plan to use.

Before you begin

Ensure the following:

- Workplace Central plugin is installed.
- Workplace Case Management plugin is installed.
- To view the space recommendations on the map, the floor map must be configured using Workplace Indoor Mapping.

Role required: sn_wsd_core.workplace_user

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About this task

Specify the department and number of spaces that you want to assign to that department on a floor. Specify the location where you want to see the allocation recommendation. Depending on the specification submitted on the form, the system provides you with options containing the most suitable space allocation plans in that building. If the selected department exists on the floor that you selected, then the spaces are recommended nearby to that department.

You can select the best option and submit the selection. If an approval is configured, then the plan is sent for an approval to your manager. The selected space plan is directed to the space planner. The space planner reviews the plan and deploys it accordingly.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. Open the General category.
   a. Select **Catalog**.
   b. Select **Browse by Categories**.
   c. In the Workplace Services Catalog, select **General**.

   Note: If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.
3. Select **Space assist request**.
4. On the form, fill in the fields.

Space assist request form

Field	Description
Request name	Descriptive name for the request.
Allocate space by	The allocation type is set with the default allocation type set by your administrator. **Note:** If there is no allocation type specified, then you cannot proceed with the request.
Requested for	Option to specify the user for whom you are raising the space assistance request.
Select a department	Department based on which you want to allocate spaces. This option appears if **Department** is set in the **Allocate space by** field.
Select a Cost center	Cost center based on which you want to allocate spaces. This option appears only appears if **Cost center** is set in the **Allocate space by** field.
Select a workplace entity type	Workplace entity type based on which you want to allocate spaces. This option appears

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Field	Description
	if **Workplace Entity** is set in the **Allocate space by** field.
Select a workplace entity	Workplace entity based on which you want to allocate spaces. This option appears if **Workplace Entity** is set in the **Allocate space by** field.
Reason for request	Option to select the reason for the request.
Space type	Option to specify what type of spaces you want.
Exact match (Space type)	Option to confirm that you want to see only the spaces that are an exact match to the selected space type.
Assignment type	Option to specify if you want flexible or permanent spaces.
Quantity/Capacity	Number of spaces that you want to allocate.
Region	Region where you want to make space allocation.
Campus	Campus where you want to make space allocation.
Site	Site where you want to make space allocation.
Building	Building where you want to make space allocation.
Exact match (Building)	Option to confirm that you want see only the spaces that are an exact match to the selected building.
Move-in date	Option to specify the date from when you want to implement the space allocation.
Exact match (Move-in date)	Option to confirm that you want see only the spaces that are available on the selected move-in date. This option is not available from Workplace Space Management version 1.12.0.
Move-out date	Option to specify the date until when you want to allocate the spaces.
Exact match (Move-out date)	Option to confirm that you want see only the spaces that are available until the selected move-out date. This option is not available from Workplace Space Management version 1.12.0.
Add attachments	Option to attach any supporting files if necessary.

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5. Select **Submit**.
   The request is submitted. After the submission, the request details page is opened.
6. In the My request page, select **Space plans**.
   Refresh the page to view space plan options.
   The page displays options that have the most suitable space allocations for the select cost center or department on the selected floor, along with the match percentage.
7. Review the options that are displayed.
   The match percentage is displayed under each option.
8. **Optional:** View the space allocations on the map by selecting **View spaces on map**.

   Note: You can view the space allocations on the map only if the floor has a floor map configured.

9. Select an option from the provided options.

   a. In the My request page, select **Tasks/To-dos**.

   b. In the **Select a space plan option**, select **View task**.
   A page with all the options that are displayed in the **Space plan** is displayed for selection.

   c. Select **Select** next to the option that you want to proceed with.

   d. **Optional:** If you do not want to select any option for any reason, select **None of the above**.

   Note: If you select **None of the above**, the request is closed and the state will be set to **Closed complete**

   e. After selection, select **Submit**.

Result

The option that you selected is submitted. At any time, you can view your selected option in the **Space plans** tab. After you submit the selection, the following actions are performed based on the approval process configured by your organization:

- If an approval process is configured for your user profile, then the space request is sent to your manager for approval. The state of the space request changes to Awaiting approval.
  - If your manager approves, the space request is sent for deployment and the state changes to Approved.
  - If your manager rejects, then the space request is rejected and the state changes to Closed incomplete.
- If your user profile doesn't require an approval, then the space request is transferred to your organization's space planner and the state changes to **Approved.**

Submit a maintenance request

Raise a maintenance request for an equipment for a location using either the Workplace Service Portal or the Employee Center.

Before you begin

Role required: sn_wsd_core.workplace_user

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Procedure

1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, se lect **General**. **Note:** If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. **c.** Select **Submit a maintenance request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. **c.** Select **Submit a maintenance request**

2. On the form, fill in the fields.

Submit a maintenance request form

Field	Description
What would you like to report?	Select the type of your maintenance request from the following options: ○ **Equipment issue**: Select this option if the maintenance request is related to an asset or a physical item. ○ **Location**: Select this option is the maintenance request is related to a location.
Item	Select the item that you want raise the request for. **Note:** The option appears only if you selected **Equipment issue** as the type.
Find the space on a floor map	Select the location on the floor map.

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Field	Description
	Note: The option appears only if you selected **Location** as the type.
Building	Select the building where the location is located. **Note:** The option appears only if you selected **Location** as the type.
Floor	Select the floor where the location is located. **Note:** The option appears only if you selected **Location** as the type.
Space	Select the space that you want to report. **Note:** The option appears only if you selected **Location** as the type.
Describe the issue	Enter a detailed description of the issue.
Add attachments	Select the option if you want to add any attachments.

3. Select **Submit**.
   The maintenance request is submitted. A workplace maintenance case is created and the state is set to Work in Progress.

Submit a catering request

Raise a catering request service using either the Workplace Service Portal or the Employee Center.

Before you begin
Role required: sn_wsd_core.workplace_user

About this task
Use the **Catering** workplace service to request for food service for meetings and events at your workplace.

Procedure
1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category.

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Location	Navigation
	i. Select **Catalog**. ii. Select **Browse by Categories**. iii. In the Workplace Services Catalog, se lect **General**. **Note:** If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. c. Select **Submit a maintenance request**.
Employee Center	a. Navigate to **All** > **Self-Service** > **Employee Center**. b. On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. c. Select **Submit a maintenance request**

2. On the Submit a **Catering** request form, fill in the fields.

Catering request form

Field	Description
Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Reservation details	The details of the reservation. Reservation details field appears only when the reservation plugin is installed. The reservation field is available when the added service item is available for case and reservation. If the reservation details are selected, then the **Requested for**, **Date and time requested by**, **Building**, **Floor**, and the **Space** fields are automatically filled based on the reservation.
Date and time requested by	**Date and time requested** for the service.
Urgency	Choose the **Urgency** for the catering service.
Impact	Choose the **Impact** of service's unavailability.
Building	**Building**, that has requested for catering service.
Floor	**Floor**, that has requested for catering service.

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Field	Description
Space	**Space**, that has requested for the catering service.
Delivery method	Select **Delivery** method of the catering service.

3. You can add service items to the reservation.

   Note: This option appears only if there is atleast one service item available for the specific location.

   The availability of the service items is determined based on the service items notifications. For more information about adding a workplace service item to a workplace service, refer to Add a workplace service item to a workplace service

4. Click **Submit**.

Result
The catering request is submitted.

The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

For more information about blocking the workplace location for a reservation, refer to Block a workplace location

Submit heating and cooling request

Raise a Heating and cooling request using either the Workplace Service Portal or the Employee Center.

Before you begin
Role required: sn_wsd_core.workplace_user

About this task
Use the **Heating and cooling** workplace service to report temperature issues for your workplace.

Procedure
1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, se lect **General**.

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Location	Navigation
	Note: If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. **c.** Select **Submit a maintenance request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. **c.** Select **Submit a maintenance request**.

2. On the **Heating & Cooling** request form, fill in the fields.

Heating and Cooling form

Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Date and time requested by	**Date and time requested** for the service.
Urgency	Choose the **Urgency** for the **Heating & Cooling** service.
Impact	Choose the **Impact** of service's unavailability.
What can we help you with	Request to report temperature issues
Building	**Building**, that has requested for heating and cooling service.
Floor	**Floor**, that has requested for heating and cooling service.
Space	**Space**, that has requested for heating and cooling service.

3. You can add service items to the reservation.

Note: This option appears only if there is atleast one service item available for the specific location.

The availability of the service items is determined based on the service items notifications. For more information about adding a workplace service item to a workplace service, refer to Add a workplace service item to a workplace service

4. Click **Submit**.

Result
The heating and cooling request is submitted.

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The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

For more information about blocking the workplace location for a reservation, refer to Block a workplace location

Submit a badge request

Raise a badge request at your workplace using either the Workplace Service Portal or the Employee Center.

Before you begin

Role required: sn_wsd_core.workplace_user

About this task

Use the **Badge request** for new hire badge, badge photo, lost badge, replacement badge, or access issue at your workplace.

Procedure

1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, se lect **General**. **Note:** If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. **c.** Select **Submit a maintenance request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. **c.** Select **Submit a maintenance request**.

2. On the submit a **Badge request** form, fill in the fields.

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Badge request form

Field	Description
Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Date and time requested by	**Date and time requested** for the service.
Urgency	Choose the **Urgency** for the Badge request service.
Impact	Choose the **Impact** of service's unavailability.
Request type	Choose the request type.
Additional details	Additional information.
Building	**Building**, that has requested for catering service.
Floor	**Floor**, that has requested for catering service.
Space	**Space**, that has requested for the catering service.

3. You can add service items to the reservation.

   Note: This option appears only if there is atleast one service item available for the specific location.

   The availability of the service items is determined based on the service items notifications. For more information about adding a workplace service item to a workplace service, refer to Add a workplace service item to a workplace service

4. Click **Submit**.

Result
The Badge request is submitted.

The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

For more information about blocking the workplace location for a reservation, refer to Block a workplace location

Submit a tech support request

Raise a tech support request using either the Workplace Service Portal or the Employee Center.

Before you begin
Role required: sn_wsd_core.workplace_user

About this task
Use the **Tech support** workplace service to request technical assistance for meetings at your workplace.

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Procedure

1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, se lect **General**. **Note:** If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. **c.** Select **Submit a maintenance request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. **c.** Select **Submit a maintenance request**.

2. On the submit a **Tech support** request form, fill in the details.

Tech support request form

Field	Description
Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Reservation details	The details of the reservation. Reservation details field appears only when the reservation plugin is installed. The reservation field is available when the added service item is available for case and reservation. If the reservation details are selected, then the **Requested for**, **Date and time requested**

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Field	Description
	by, **Building**, **Floor**, and the **Space** fields are automatically filled based on the reservation.
Date and time requested by	**Date and time requested** for the service.
Urgency	Choose the **Urgency** for the tech support service.
Impact	Choose the **Impact** of service's unavailability.
Building	**Building**, that has requested for tech support service.
Floor	**Floor**, that has requested for tech support service.
Space	**Space**, that has requested for the tech support service.

3. You can add service items to the reservation.

   Note: This option appears only if there is atleast one service item available for the specific location.

   The availability of the service items is determined based on the service items notifications. For more information about adding a workplace service item to a workplace service, refer to Add a workplace service item to a workplace service

4. Click **Submit**.

Result
The tech support request is submitted.

The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

For more information about blocking the workplace location for a reservation, refer to Block a workplace location

Submit a cleaning request

Raise a cleaning request using either the Workplace Service Portal or the Employee Center.

Before you begin
Role required: sn_wsd_core.workplace_user

About this task
Use the **Cleaning** workplace service to request for cleaning service at your workplace.

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Procedure

1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, se lect **General**. **Note:** If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. **c.** Select **Submit a maintenance request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. **c.** Select **Submit a maintenance request**.

2. On the submit a **Cleaning** request form, fill in the details.

Cleaning request form

Field	Description
Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Date and time requested by	**Date and time requested** for the service.
Urgency	Choose the **Urgency** for the cleaning service.
Impact	Choose the **Impact** of service's unavailability.
Cleaning issue	Select the cleaning issues.
Additional details	Additional information.
Building	**Building**, that has requested for cleaning service.

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Field	Description
Floor	**Floor**, that has requested for cleaning service.
Space	**Space**, that has requested for the cleaning service.

3. Click **Submit**.

Result
The cleaning request is submitted.

The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

For more information about blocking the workplace location for a reservation, refer to Block a workplace location

Submit an equipment request

Raise an equipment request at your workplace using either the Workplace Service Portal or the Employee Center.

Before you begin
Role required: sn_wsd_core.workplace_user

About this task
Use the **Equipment** workplace service to request for additional chairs, tables, or whiteboards at your workplace.

Procedure
1. Navigate to the portal from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Work place service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, se lect **General**. **Note:** If there are multiple catalogs configured on the portal, go to the Cat alogs list and select **Workplace Ser vices Catalog** > **General**. **c.** Select **Submit a maintenance request**.

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Location	Navigation
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Maintenance**. **c.** Select **Submit a maintenance request**.

2. On the submit **Equipment** request form, fill in the fields.

Equipment request form

Field	Description
Requested for	Name of the requester. If a workplace profile is defined for the requester, then the **Building**, **Floor**, and the **Space** fields are automatically filled.
Reservation details	The details of the reservation. Reservation details field appears only when the reservation plugin is installed. The reservation field is available when the added service item is available for case and reservation. If the reservation details are selected, then the **Requested for**, **Date and time requested by**, **Building**, **Floor**, and the **Space** fields are automatically filled based on the reservation.
Date and time requested by	**Date and time requested** for the service.
Urgency	Choose the **Urgency** for the equipment service.
Impact	Choose the **Impact** of service's unavailability.
Building	**Building**, that has requested for equipment service.
Floor	**Floor**, that has requested for equipment service.
Space	**Space**, that has requested for the equipment service.

3. You can add service items to the reservation.

Note: This option appears only if there is atleast one service item available for the specific location.

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The availability of the service items is determined based on the service items notifications. For more information about adding a workplace service item to a workplace service, refer to Add a workplace service item to a workplace service

4. Click **Submit**.

Result
The equipment request is submitted.

The state of the request changes to Awaiting approval for approval by the respective manager. After the request is approved, the state of the request changes to Work in progress. Depending on the progress of the background tasks that are assigned to fulfill the request, the state of the request further changes.

For more information about blocking the workplace location for a reservation, refer to Block a workplace location

Edit a workplace request

Edit the details of a workplace request or change workplace service items included in a workplace request.

Before you begin
Editing a request is supported for the following request types:

- Badge requests
- Catering
- Cleaning
- Employee parking
- Equipment
- Furniture request
- General request
- Heating and cooling request
- Space arrangement request
- Tech support

If you have created a request from a workplace reservation, you can only edit the request from the reservation summary page. For more information, see Share, modify, or cancel a reservation.

Note:

- Based on the configuration set by your admin, you might not be able to edit a request.
- Editing a request is only supported for open requests. If a request is closed or complete, it can't be edited.
- Editing a request is supported only if the request contains workplace service items.
- If all the workplace services of a request are fulfilled, the request can't be edited, even if it's an open request.
- Service items that are within the lead time can't be modified.

Role required: sn_wsd_core.workplace_user

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Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
   a. On the Employee Center landing homepage, select the **Workplace Services** > **Maintenance**.
   b. Select **Submit a maintenance request**.
2. On the Employee Center landing page, select **My Requests**.
3. From the My Requests list, select the workplace request that you want to edit.
4. On the request details page, select **Actions**, then select **Edit request**.
5. Edit the details of the request based on your requirement.
6. **Optional:** Edit workplace service items that are included in your request.
   You can add or remove workplace service items from the request. You can also change the quantities of service items that are already added to the request.

   Note: A workplace service item can't be edited if it has already been fulfilled.

7. Select **Save**.
   The Workplace Request is updated.

Submit an emergency maintenance request

Submit an emergency maintenance request for a meeting room.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Home** > **Catalog** on the navigation menu bar.
   You can also access the Emergency Maintenance request form using the Employee Center portal. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace Services** > **Maintenance** > **Submit an emergency maintenance request**.
2. Select **Submit an emergency maintenance request** record form.
3. Fill in the field information.

What area needs attention

Field	Description
Building	Building for which the maintenance request is raised.
Floor	Floor where the maintenance is to be carried out.
Space	Workspace which needs maintenance.
Describe the issue	Short description of the maintenance case.

4. Select **Submit**.
   A workplace case is created and it is assigned automatically to the Workplace Event Planners assignment group. It is then assigned manually to a user in the Workplace Event Planners assignment group. For more information, see View emergency maintenance case details.

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When the emergency maintenance request case is assigned to a orkplace Event Planners assignment group, the AI agentic workflow **Manage temporary space closures** is triggered. The team of AI agents block a workspace location for maintenance. AI agents create a record in the sn_wsd_core_block_location table for blocking a location. If there are any impacted reservations for a blocked location, AI agents move any existing reservations to a new location.For more information, see Manage temporary space closures agentic workflow.

Submit a change event request for a reservation

As a workplace employee, request a change to the date, time, and duration of your planned event reservation.

Before you begin

Note: Only reservations created by an employee or if they are set as requested by in Workplace Reservation Management are visible for you to select and update.

Select a reservation that you want to update and select the new date, time, and duration for which you want to update your reservation. A workplace case is created with an updated or a new workplace service.

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Home** > **Catalog** on the navigation menu bar. You can also access the Emergency Maintenance request form using the Employee Center portal. Navigate to **All** > **Self-Service** > **Employee Center** > **Workplace Services** > **Maintenance** > **Change Event Reservation**.
2. Select **Change Event Reservation** record form.
3. Fill in the field information.

Change Event Reservation

Field	Description
Reservation details	Description that you gave while creating a reservation. Select the description from the drop-down list. As you type, system auto-fills the description from the cached information.
Reservation subject	Reservation purpose for which you are reserving a room. When you select the Reservation details field, this information is automatically updated.
Start Date and Time	Start date and time for a reservation. Select the start date and time.
End Date and Time	End date and time for a reservation. Select the end date and time.
Comments	Optional. Add any comments, if required.

4. Select **Submit**.

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When a change event request is submitted, a workplace case is created. The case is automatically assigned to the Workplace Event Planners assignment group. It is then assigned manually to a user in the Workplace Event Planners assignment group.

When the change event request case is assigned to a Workplace Event Planner, AI agentic workflow **Help Manage workplace Reservations** is triggered. AI agents retrieve a reservation from case details, analyze the reservation, and update the reservation case notes for workplace event planners to review. If the same location is available for the updated date and time, application reserves a space for you. If you cannot find a location of your choice when you are changing the date, time, and duration of a reservation, application provides a link for you to select a preferred location manually.

For more information, see View change event reservation case details and Help manage workplace reservations agentic workflow.

Managing Workplace cases

As a Workplace case manager, you can manage workplace cases created through workplace services. You can view and update cases if required.

View and track workplace cases

View and track open, closed, and unassigned workplace cases.

Before you begin

Role required: sn_wsd_case.admin, sn_wsd_case.manager, sn_wsd_case.case_reader

About this task

You can view any workplace case when required. View the details provided by the user in the Variables section of the workplace case.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases**.
2. Select any of the following options to view workplace cases:
   - **Assigned to me**: Select this option to view workplace cases assigned to you.
   - **Assigned to my group**: Select this option to view workplace cases assigned to your group.
   - **Open:** Select this option to view open workplace cases.
   - **Open-unassigned**: Select this option to view open but unassigned workplace cases.
   - **Closed**: Select this option to view closed workplace cases.
   - **All**: Select this option to view the workplace cases.
3. To view all the workplace cases, select **All**.
4. Select any workplace case to view the details.

Workplace cases form

Field	Description
Number	Unique ID assigned to a workplace case request.
State	State of a workplace case request. For example: Workplace case is active, closed, complete, or work in progress, ready, or canceled.

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Field	Description
Workplace case task type	
Workplace location	Location for which the workplace case request was raised.
Workplace service item	Name of the service item. For example, space arrangement, tea, coffee, and so on.
Quantity	Service item quantity number.
Created	Date and time when the workplace case was created.
Updated	Date and time when the workplace case was updated.
Assignment group	Workplace assignment group to which the case is assigned to.
Assigned to	User assigned to this case task.
Vendor	Name of the vendor fulfilling the request.
Parent	Parent case ID number.
Delivery time	Delivery time of the requested service item.
Clean up duration	Clean up the duration time for a space.
Preparation start time	Start time when the service item will be prepared.
Preparation duration	Preparation duration for a service item request.
Cost	Cost of the service items.
Active	Option to enable and indicate that the case task is active.
Replacement for	When a service is updated or edited on the Workplace Reservation Management portal, the workplace case that was originally raised is replaced by a new workplace case. This notification is meant for the workplace manager or workplace agent and does the following: ○ On the old case, a notification is displayed pointing to the new case. ○ On the old case, a notification is displayed to enable easy access to the previous case to look up past actions. For example: If while making a reservation, the original case that you raised for a service request is WCASE0001207. After you edit or update while changing a space (location), date, and time, a new service case, WCASE0001208, is raised as a replacement to the original case request

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Field	Description
	(WCASE0001207). When you open the newly created request WCASE0001208, the following notification is displayed: `This is a replacement task, please check the parent case comments to see the changes, if required. The previous parent case: WCASE000127.` For more information about retaining or discarding services while updating a reservation location, see Create a reservation.
Time worked	Tracks the total time spent on a case or task. The timer starts at zero, tracks time until the record is saved or closed, and resumes when revisited. You can also manually adjust, pause, or resume the timer.

5. Select the gear icon (Gear icon ) to add the additional fields that you require. For example, the **Quantity**, **Total cost**, **Reservation** fields, and so on.
6. **Optional:** Select the **Fulfillment instructions** tab and select the Checklist list to create a checklist for fulfilling the service request.
7. Check the Comments and Work Notes section to see the comments added to a service request, date and time when the service was updated, or when the service was canceled.

   Applicable only for cases created as part of a reservation. When the employee changes the service and a new case is created, a summary is added to the work notes of the new case showing the following information:

   - Added
   - Changed
   - Removed
   - Not changed

   The work notes also shows the services that are not changed along with the name of the service and quantity.

8. To see tasks associated with a case (applicable only when services are ordered as part of a reservation), select the **Child tasks** related link.

   New child cases for services on a category level can be created and replaced with existing ones after an employee changes services or updates a reservation. The previous cases are set to **Cancelled**.

   - Select the child task to see the details, if applicable.

     A message is displayed describing that this case is a replacement case for a previous case.

   - Select the case ID to view the previous case request details.

   For more information, see Create a reservation.

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9. Costs are visible in the case and task level and are calculated and updated when an employee orders or edits services as part of a reservation.

    - **Parent**: In a Parent case, cost is shown as a sum of the active child (category) cases.
    - **Child (category)**: For child cases, cost is shown as a sum of the costs for the related tasks and cases.
    - **Tasks**: In related tasks and cases, cost is shown as price per item, quantity, and the total costs.

10. To retain services while making a reservation using the Workplace Reservations for Microsoft Outlook Add-in, employees must open the reservation and open the plugin to change the date, time, or locations.
11. Select **Save reservation** to confirm that the services are retained,

> **Note:** Only updating the reservation in Workplace Reservations for Microsoft Outlook Add-in cancels the services.

View emergency maintenance case details

Workplace Event planners can view the emergency maintenance case details and the actions taken by AI agents in the case work notes.

Before you begin

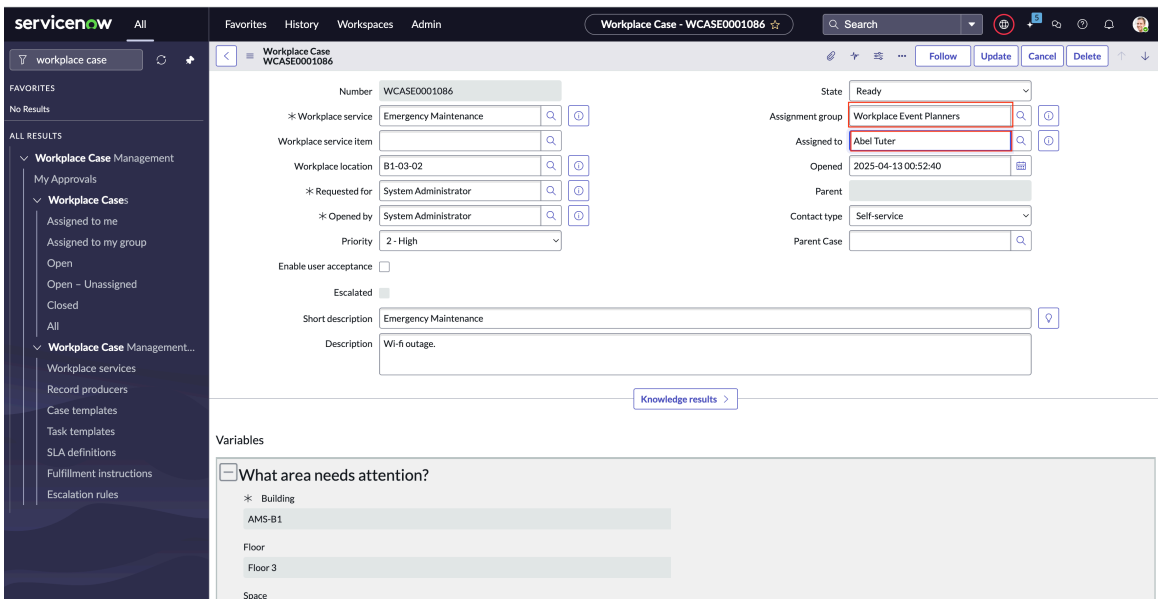
The following applications should be installed:

- Workplace Core
- Workplace Case Management
- Workplace Reservation Management
- Workplace Concierge

Role required: sn_wsd_rsv.reservation_planner, sn_wsd_case.case_writer

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases** > **All**.



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When an emergency maintenance request is submitted, a workplace case is created. For more information about the emergency maintenance request, see Submit an emergency maintenance request.

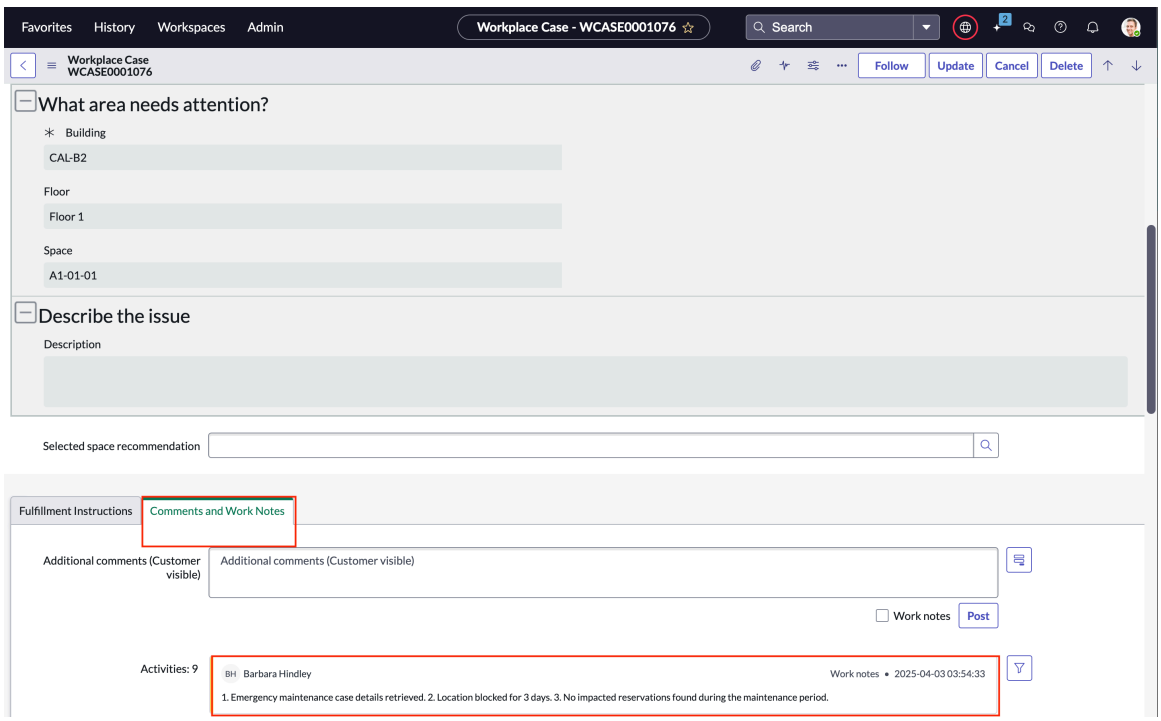
The change event request workplace case is automatically assigned to the Workplace Event Planner assignment group. It is then assigned manually to a user in the Workplace Event Planners assignment group. When it is assigned to a Workplace Event Planner, AI agentic workflow Manage temporary space closures is triggered. AI agents block a location for maintenance and move any impacted reservations from the blocked location to an available new location. For more information, see Manage temporary space closures agentic workflow.

Event planners can review the notifications sent by AI agents in the Now Assist panel. AI agents notifies Workplace Event Planners about actions taken through case resolution and case summarization notes in the conversational interface. For more information, see Review notifications in the Now Assist panel.

The team of AI agents also update the case work notes.

2. To review the work notes for a case, select an emergency maintenance request case (**All** > **Workplace Case Management** > **Workplace Cases** > **All**).
3. Scroll down and select the Comments and Work Notes section.

   The emergency maintenance case activities are also added to the work notes of a case. Workplace Event planners can review the work notes to understand the activities performed by AI agents. Review the activity log and resolution notes provided by AI agents for an emergency maintenance case.



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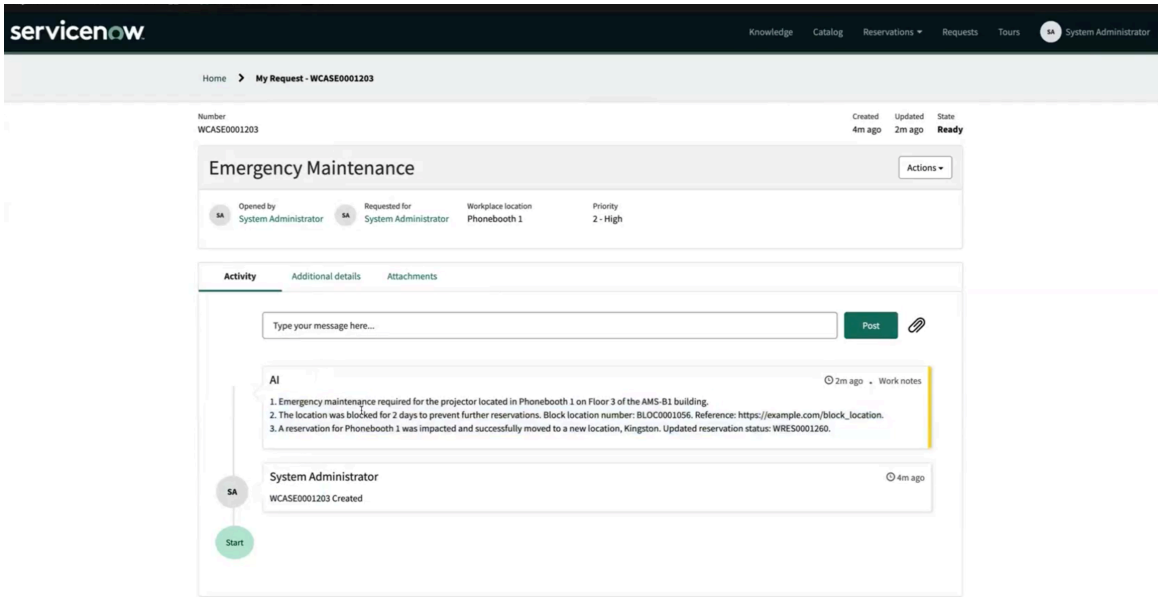

4. **Optional:** Navigate to **All** > **Workplace Reservation Management** > **All Reservations** > **Workplace Reservations**.
   - Review the multi-building or single building reservation that was canceled from a location for workplace maintenance.

     (Optional) The reservation gets moved to a new location. For example, Kingston campus.
   - Select and open the reservation (Kingston) that is in confirmed state and moved to a new location.
   - From the Related List, select the **Requested Service Items** tab.

     Verify the workplace reservation services that are moved from the canceled reservation location to the new reservation location.
   - From the Related List, select the **Invitees** tab.

     Verify the invitees that are moved to the selected or moved reservation location.
   - Navigate to the Reservation summary page to verify the canceled reservation and the updated reservation with a new location.
5. **Optional:** An email notification is triggered and sent to workplace reservation administrators and event planners for the updated reservation location.

View change event reservation case details

Workplace Event planners can view the change event reservation case details and the actions taken by AI agents in the case work notes.

Before you begin

The following applications should be installed:

- Workplace Core
- Workplace Case Management
- Workplace Reservation Management
- Workplace Concierge

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Role required: sn_wsd_rsv.reservation_planner, sn_wsd_case.case_writer

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases** > **All**.
   Select and review the work notes details for a change event reservation case. For more information, see Submit a change event request for a reservation.

   When a change event reservation request is submitted by a workplace user, a workplace case is created. The workplace case is assigned automatically to the Workplace Event Planners group. It is then assigned manually to a user in the Workplace Event Planners assignment group. When the case is assigned to a Workplace Event planner, the AI agentic workflow Help manage workplace reservations is triggered. AI agents autonomously retrieve the reservation from the case details and analyze the reservation to update it to a new date, time, and duration. For more information, see Help manage workplace reservations agentic workflow.

   AI agents notifies the Workplace Event Planners using the Now Assist panel conversational interface. For more information, see Review notifications in the Now Assist panel. The workplace notes are also added for a change event request case.

   The team of AI agents also update the case work notes.

2. To review the workplace case notes, select a change event request case (**All** > **Workplace Case Management** > **Workplace Cases** > **All**).
3. Scroll down and review the Comments and Work Notes section.

   Review the activity log and resolution notes provided by AI agents for a change event request case.

Print workplace cases

Print case details along with associated services or service items to support effective case management and resolution.

Before you begin

Role required: sn_wsd_case.case_reader, sn_wsd_case.case_writer, sn_wsd_case.workplace_agent

About this task

As a case admin, you can view a case report that includes reservation details, services, and other relevant information. You can also configure the Workplace Case, Workplace Reservation, and Workplace Task document templates as required. For more information, see Configuring Document Templates.

Note: Enable the Print case feature by installing the Document Templates plugin.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases**.
2. Select any of the following options to view workplace cases:
   - **Assigned to me**: Select this option to view workplace cases assigned to you.
   - **Assigned to my group**: Select this option to view workplace cases assigned to your group.
   - **Open**: Select this option to view open workplace cases.
   - **Open-unassigned**: Select this option to view open but unassigned workplace cases.

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- **Closed**: Select this option to view closed workplace cases.
- **All**: Select this option to view the workplace cases.

3. View all the workplace cases by selecting **All**.
4. View the details by selecting any workplace case.
5. Select **Print case**.
   The downloaded document displays the workplace case and the associated child case details.

> **Note:** The **Print case** button is visible to users with the sn_wsd_case.case_reader role only.

Managing print cases

Filter workplace cases using criteria such as the Short Description, Workplace Location, or other relevant fields to generate a consolidated report.

Use one of the following options to proceed:

- Print Filter Selection – Apply filters and select this option to create a workplace task with the consolidated report attached.
- Print Selected Records – Manually select one or more workplace cases and choose this option to view the consolidated report directly.

Print filtered cases

Use filter criteria to filter multiple cases and generate a consolidated report based on the filtered cases. You can set the condition based on the Short description, workplace location, or any other fields. When you run the filter and select Print filter selection, a new workplace task is created with the consolidated report as an attachment.

Before you begin

Role required: sn_wsd_case.case_reader

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases**.
2. Select the filter icon and set the filter criteria.
   The results appear based on the filtered condition.
3. Select **Print filter selection**.
   You can view the consolidated report with the filtered case details in a new Workplace Task page.

Print selected cases

Print a consolidated report, including child cases and associated services, by selecting one or more workplace cases.

Before you begin

Role required: sn_wsd_case.case_reader

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Cases**.
2. Select one or more workplace cases.
3. Select **Print selected records**.

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4. Download and view the consolidated report in the Workplace Task.
   Select **Print Task** to view the workplace task report.

Workplace Service Delivery integration with Universal Request

Combine Workplace Service Delivery services with Universal Request so that you can provide a convenient workplace experience to your employees. Provide a common help desk so that your employees can submit requests that are related to their workplace without having to search the Workplace services catalog.

The integration with Universal Request enables an employee to submit a general inquiry for any workplace-related issue. An employee can get support by selecting a single-help option for services that are not included in the catalog.

For more information about a Universal Request, see Universal Request.

Benefits of integrations with Universal Request

The integration enables you to perform the following actions:

- Create a workplace case directly from the Universal Request application using the **Create a workplace case** option.
- Transfer a workplace case to another department or back to the Universal Request queue by using the **Transfer** option.
- Configure a workplace service as a Universal Request.
- View workplace cases created by Universal Request under **Workplace Cases** > **All**.
- On the Workplace Service Portal, an employee can view the Universal Request raised by them in **Workplace Service Portal** > **Requests**.

System requirements to integrate Workplace Service Delivery with Universal Request

The following plugins must be installed:

- Universal Request (com.snc.universal_request)
- Workplace Service Delivery - Core (sn_wsd_core)
- Workplace Case Management (sn_wsd_case)

Universal Request and workplace cases

When employees cannot find a workplace service that is suitable to their issue on the Workplace Service Portal, they can select the **Request help** option. The following actions are performed when an employee selects **Request help**:

1. The option navigates the employee to a help form where the employee can specify any issue details. This help request triggers a Universal Request.
2. The Universal Request is assigned to a routing agent. The agent analyzes the request as a workplace-related query and creates a workplace case.
3. The workplace manager handles the workplace case and changes the state of the case depending on the progress.
4. The Universal Request is then closed only when the employee accepts the resolution.

As a workplace manager, you can transfer a workplace case that was created by Universal Request back to the Universal Request queue if it does not relate to workplace services.

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Employees can view the details related to their Universal Request anytime.

Configure a workplace service record producer as a Universal Request

Enable an employee to submit a universal request using a workplace service record producer from the Workplace Service Portal. Configure a workplace service to create Universal Request whenever an employee makes a selection.

Before you begin

Ensure that you have activated the Universal Request plugin.

Ensure that you have the following:

- A workplace service that is linked to a record producer. For more information, see Configure a Record producer.
- An active record producer.

Role required: sn_wsd_case.admin or sn_wsd_case.manager

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Record producers**.
2. Select the record producer that you want to configure as a universal request.
3. Select **Universal Request Config** tab.
4. To enable the universal request feature, select **Create Universal Request**.
5. If the universal request requires an extra review, select **Requires Additional Review**.
6. Click **Update**.

Result

The workplace service record producer is configured as a universal request.

When an employee submits an inquiry using this workplace service, a universal request is created. The request is automatically assigned to the Workplace services assignment group.

Create a workplace case from Universal Request

As a routing agent, create a workplace case from a universal request and then assign it to the Workplace services assignment group. The workplace manager handles the workplace case and takes further actions to fulfill the request.

Before you begin

Ensure that you have the following plugins installed:

- Universal Request (com.snc.universal_request)
- Workplace Service Delivery - Core (sn_wsd_core)
- Workplace Case Management (sn_wsd_case)

Role required: routing_agent and sn_wsd_case.case_writer

Procedure

1. Navigate to **Universal Requests** > **All**.
2. Open the universal request record from which you want to create a workplace case.
3. Click **Create Workplace Case**.

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Result
A workplace case is created and is automatically assigned to the Workplace services assignment group. If required, you can also add more details on the Workplace Case form.

On the Workplace Case form, the universal request number that was used for creating the workplace case is displayed. The Workplace case number appears in the primary **Ticket** field on the Universal Request form and also under the Associated Tickets related list.

Work on a workplace case from a Universal Request

As a workplace manager, work on a workplace case that is created from a Universal Request. Provide a resolution to the workplace case.

Before you begin
Role required: sn_wsd_case.case_writer

About this task
You can configure the state changes that are described in the following procedure as per your requirements. For more information, see Universal Request state mapping.

Procedure
1. Navigate to **Workplace Case Management** > **Workplace cases** > **All**.
2. Select the workplace case record that is created from the Universal Request.
3. On the form, change the **State** field to **Work in progress**.

   Note: If the workplace case does not relate to any workplace service, then transfer the case to the relevant department or back to the Universal Request queue. Select **Transfer** to transfer the case. For more details on how to transfer a case, see Transfer a workplace case created from a universal request.

4. When you resolve the case, change the state to **Closed complete**.

Result
The state of the Universal Request is updated based on the state of the workplace case. For more information about state changes of a Universal Request, see Universal Request states and reasons.

If you change the state of the workplace case to Close incomplete without transferring the case back to the Universal Request queue or to another department, then one of the following actions is performed:

- If the **Needs Additional Review** option is selected on the Universal Request, then the state of the request changes to the In progress state.
- If the **Needs Additional Review** option is not selected on the Universal Request, then the request is closed based on the state mapping.

Transfer a workplace case created from a universal request

Transfer a workplace case back to the Universal Request, to another department, or to another service. You can transfer the request with or without providing a resolution.

Before you begin
Note: To transfer a case, either you must be part of the assignment group or the case must have been assigned to you.

Role required: sn_wsd_case.case_writer

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Procedure

1. Navigate to **Workplace Case Management** > **Workplace cases** > **All**.
2. Select the workplace case record that you want to transfer.
3. Click **Transfer**.
4. In the Transfer Ticket dialog box, provide the transfer details.

Transfer Ticket form

Field	Description
Department	Department that you want to transfer the case to.
Transfer reason	Reason why you are transferring the request to the department.
Transfer notes	Brief description on the reason for transferring the primary ticket. These notes are read by the UR Routing agent who handles universal requests.
Copy additional comments and attachments	Option to copy the comments and attachments of this case while transferring. The option is automatically selected. **Note:** The transfer action does not copy work notes.

5. Click **Transfer**.

Result
The case is transferred to the selected department.

Setup Integrated Facilities Management Integration Framework

Set up the Integrated Facilities Management (IFM) Integration Framework to connect Workplace Cases and Tasks in ServiceNow with external facilities management provider systems, enabling automated work order synchronization and end-to-end visibility across platforms.

The Integrated Facilities Management (IFM) Framework automates the creation and management of work orders with third-party facilities management providers when workplace cases are created in ServiceNow. This framework facilitates bidirectional communication, allowing ServiceNow to create, add comments to work order, and cancel work order in external FM systems while receiving status updates and comments back from FM providers.

This integration framework eliminates manual work order creation and tracking, automates case-to-work-order lifecycle management, and provides unified visibility across both platforms.

Benefits of Integrated Facilities Management Framework

The IFM Framework integration enables you to perform the following actions:

- Create work orders automatically in external FM systems directly from ServiceNow workplace cases.
- Configure provider routing rules to automatically assign workplace cases or tasks requests to appropriate FM providers based on service type, location, building, or custom criteria.

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- Track work order synchronization status in real-time using the FM Provider and FM Work Order ID fields on workplace cases.
- Add comments to workplace case or task, and any updates will automatically appear in external work order.
- Cancel workplace case and automatically trigger cancellation of corresponding work orders in FM provider systems.
- Receive inbound updates from FM systems that automatically update ServiceNow cases or tasks.

Case Lifecycle and Provider Ownership

1. When a workplace case or task is created in ServiceNow, the provider routing engine evaluates the configured routing rules to determine the appropriate FM provider. Based on the matching rule, the selected provider is stamped on the workplace case or task record. The provider routing engine is triggered only at the time of record creation, and after the provider is stamped, it cannot be changed.
2. Once the provider is stamped, the workplace case or task is automatically synchronized with the external FM provider system, where a corresponding work order is created.
3. After synchronization is complete, the FM provider becomes the primary owner of the work order. Users can add comments or cancel the workplace case or task in ServiceNow, while all other edit operations are restricted to prevent data conflicts with the external FM provider system.

Included Case Types

Only workplace cases with a Fulfillment type of Manual are eligible for synchronization with external FM provider systems.

Excluded Task Types

The following task types are excluded from synchronization:

- Automated Task
- Assign Neighborhood Space
- Consolidated Report
- Select Space Option
- Space Request

Prerequisites and Requirements

The following plugins must be installed:

- Workplace Core (sn_wsd_core)
- Workplace Case Management (sn_wsd_case)
- Integration Hub (com.glide.hub.integrations.professional)

Create a facilities management provider

Create a facilities management provider to connect Workplace Cases and Tasks in ServiceNow with an external facilities management (FM) system using the IFM Framework. The provider record defines how ServiceNow creates, updates, and cancels work orders in a third-party FM system and enables end-to-end visibility across both systems.

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Before you begin
Role required: admin

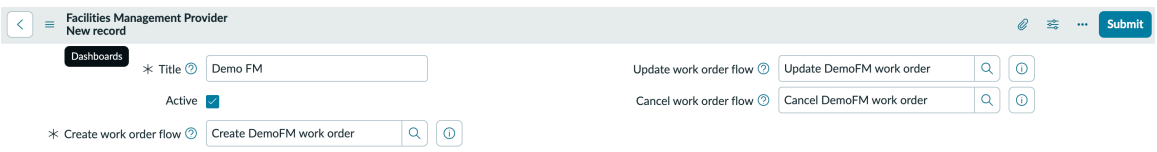
About this task
A Facilities Management Provider record represents a third-party FM vendor that can receive and manage work orders from ServiceNow workplace cases. Each provider has their own plugin application and configured flows that handle integration with their work order management system. After creating a provider, configure routing rules to automatically direct specific types of workplace requests to the appropriate FM provider based on service type, location, or other criteria.

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Facilities Management - Setup** > **Providers**.
2. On the Facilities Management Providers page, select **New**.
3. On the form, fill the field details.

Facilities Management Provider

Field	Description
Title	The unique identifier name for the facilities management provider. For example, JLL.
Active	Indicates whether the facilities management provider is currently active and available for integration.
Create work order flow	Reference to the Flow Designer workflow that handles the creation of new work orders in the external FM provider system. This flow is triggered when a workplace case is created and a routing rule assigns it to this provider.
Update work order flow	Reference to the Flow Designer workflow that synchronizes updates from ServiceNow to the external FM provider system. This flow handles operations such as adding comments or work notes to existing work orders.
Cancel work order flow	Reference to the Flow Designer workflow that processes work order cancellation requests sent to the external FM provider system. This flow is triggered when a workplace case is cancelled, notifying the FM provider to cancel the corresponding work order in their system.

Note: For more information about work order flows, see .



4. Select **Submit**.

Configure provider routing rules

Provider Routing Rules determine which workplace cases and tasks are sent to which FM providers. Rules use standard ServiceNow condition builders to evaluate case attributes.

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Before you begin

Role required: sn_wsd_case.manager

Procedure

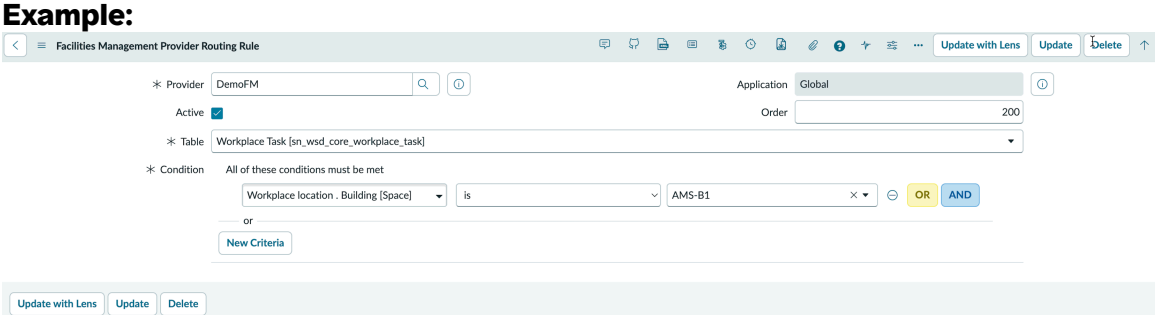
1. Navigate to **All** > **Workplace Case Management** > **Facilities Management - Setup** > **Provider routing rules**.
2. Select **New**.
3. On the form, fill in the fields.

Provider routing rules

Field	Description
Provider	The FM Provider this rule routes to.
Active	Indicates if the rule is currently active.
Order	The priority sequence number that determines when this rule is evaluated relative to other routing rules. Routing rules are prioritized as follows: ○ Order field (in ascending order, with lower numbers given higher priority) ○ Provider creation date (providers created earlier are prioritized) ○ Rule creation date (rules created earlier are prioritized)
Table	The ServiceNow table that this routing rule applies to. This defines which record types will be evaluated against this rule. For example, Workplace Case [sn_wsd_case_workplace_case].
Condition	The criteria that must be met for this routing rule to match and apply to a workplace case or task. Use the AND, OR condition builder to define one or more conditions based on field values such as service type, location, building, or any other workplace case fields. The system evaluates these conditions against incoming workplace cases to determine provider routing. For example, [Workplace service] [is] [Cleaning].

4. Select **Submit**.

Example:



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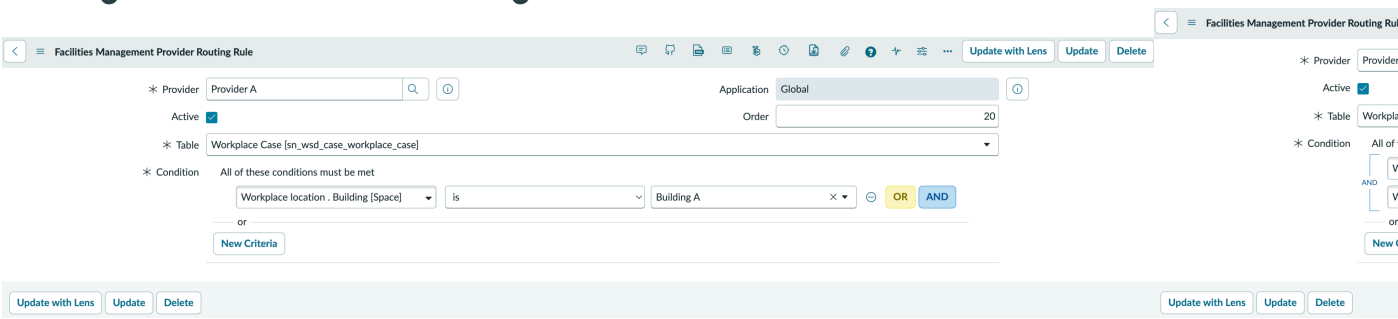
Example: Route the case to Provider B when the workplace service is Heating & Cooling and the location is Building A



Create application restricted caller access for provider application

Create restricted caller access (RCA) privilege for the provider application to allow inbound updates to Workplace case or task.

Before you begin

Role required: admin

About this task

You can create application-restricted caller access limited to inbound updates, allowing FM providers to update fields or add comments on Workplace cases or tasks.

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access**.
2. Select **New**.
3. On the form, fill in the fields.

Restricted Caller Access Privilege

Field	Description
Source Scope	Scope of the calling application. Select the application from the list.
Application	Scope of the ServiceNow application where this routing rule applies. This field is automatically set to Workplace Case Management.
Source Type	Type of record that is calling the application resource. Select **Scope**.
Target Scope	Scope of the requested resource. Select **Workplace Case Management**.
Status	Status of the access request. Select **Allowed**.
Target Type	Type of the requested resource. Select **Scope**.
Description	The reason for access from the source to the target.

4. Select **Submit**.

Analytics and Reporting Solutions for Workplace Case Management

Monitor the status of workplace cases raised in your organization.

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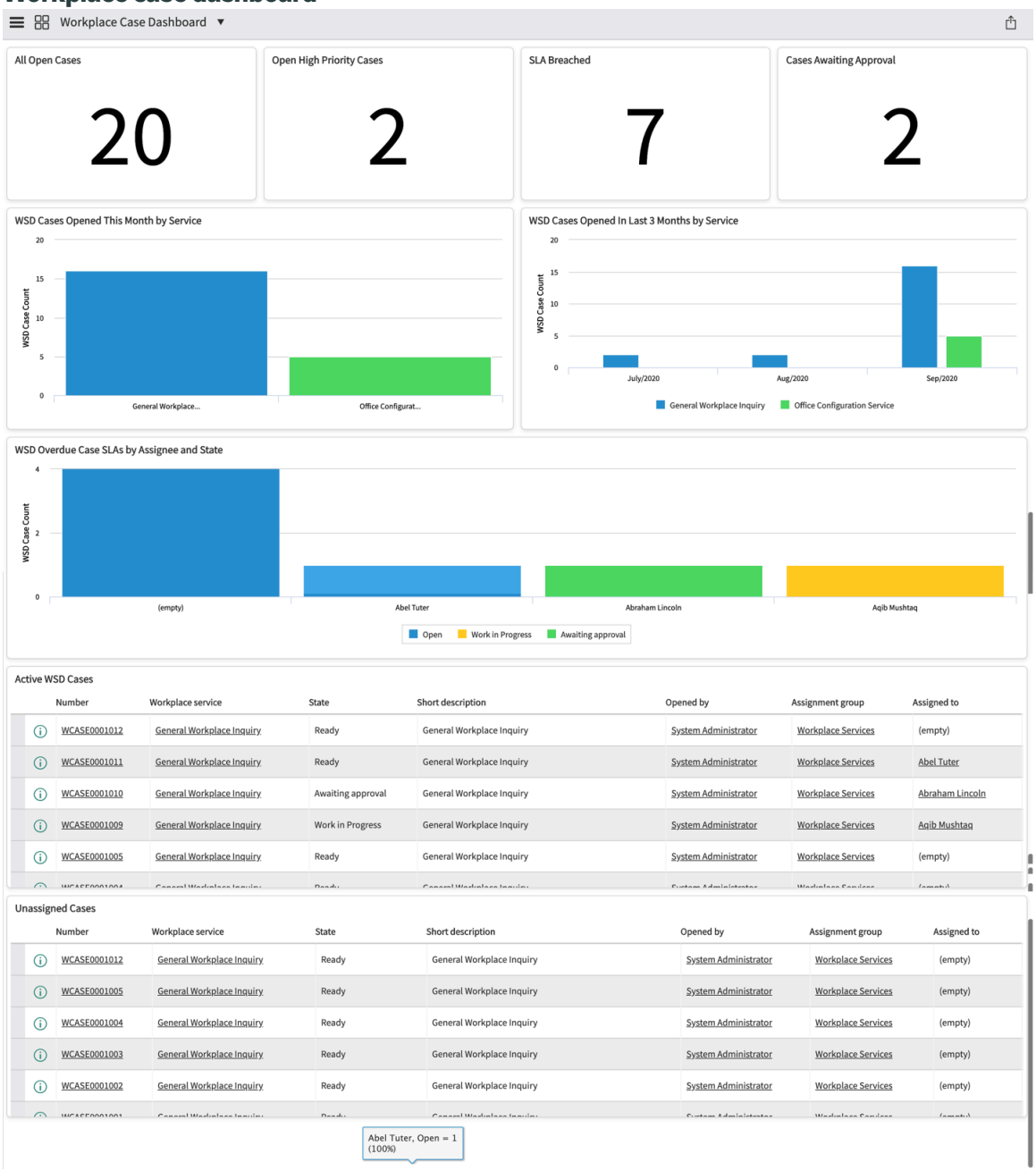
Workplace Case dashboard

Use this dashboard to track the number of workplace cases that were created using the workplace services from the Workplace Service Delivery or from the Workplace Service Portal. Monitor the number of open cases, cases that require approval, and other cases on any given day.

The Workplace Case Management dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central. Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

Workplace case dashboard



To access the Workplace Case dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards**.

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End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace case manager: Needs visibility into the real-time status of workplace cases.	sn_wsd_case.manager	• Reviews all open cases • Monitors high priority cases • Monitors cases that have breached an SLA. • Monitors number of cases awaiting approval.

Data visualizations

Data visualizations

Title	Type	Description
All Open cases	Single score	Number of open workplace cases.
Open High Priority Cases	Single score	Number of high priorities workplace cases that are open.
SLA Breached	Single score	Number of workplace cases that breached SLA.
Cases Awaiting Approval	Single score	Number of workplace cases awaiting approval.
WSD Cases Opened This Month by Service	Column	Number of workplace cases created using the associated workplace services.
WSD Cases Opened in Last 3 Months by Service	Column	Number of workplace cases created in the last three months using the associated workplace services.
WSD Overdue Case SLAs by Assignee and State	Column	Number of workplace cases that have crossed the SLA deadline represented with respected to the assignee.
Active WSD Cases	List	List of active workplace cases on the current day.
Unassigned Cases	List	List of unassigned workplace cases on the current day.

Workplace Case Management references

Learn more about the role, tables and system properties installed with the Workplace Case Management application.

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Components installed with Workplace Case Management

Several types of components are installed with activation of the Workplace Case Management application, including tables, user roles, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles

Roles installed with Workplace Case Management

Role title [name]	Description	Contains roles
Group roles: Workplace Event Planners	AI agentic workflow autonomously assigns emergency maintenance request and change event request submitted by a workplace user. For more information, see Manage temporary space closures agentic workflow and Help manage workplace reservations agentic workflow.	• sn_wsd_case.case_writer • sn_wsd_rsv.reservation_planner
Workplace Case Management admin [sn_wsd_case.admin]	• Sets up data related to workplaces services. • Creates workplace services. • Has complete access to the application.	sn_wsd_case.manager

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Roles installed with Workplace Case Management (continued)

Role title [name]	Description	Contains roles
Workplace case Manager [sn_wsd_case.manager]	• View all cases. • Manage cases. • Create, read, update, and delete Case templates. • Create, read, update, and delete Task templates. • Create, read, update, and delete Workplace Services. • Create, read, update, and delete Workplace Service Activities. • Create, read, update, and delete Approval options. • Create, read, update, and delete an Escalation rule. • Create, read, update, and delete Fulfillment instructions. • Perform agent-related actions.	• template_editor_global • sn_wsd_case.workplace_agent
Workplace case agent [sn_wsd_case.workplace_agent]	In addition to all the permissions of a Workplace case writer,	• sn_wsd_case.case_writer • sn_wsd_core.kb_writer • flow_operator

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Roles installed with Workplace Case Management (continued)

Role title [name]	Description	Contains roles
	• Can view flow executions. • Can write knowledge base articles.	

Workplace case writer
[sn_wsd_case.case_writer]
	• Create, read, update, and delete Workplace Tasks.
	• Read Task templates.
	• Create, read, update, and delete Workplace cases.
	• Read the following:
	  ○ Escalation rules
	  ○ Fulfillment instructions
		• sn_wsd_core.task_writer
		• sn_wsd_case.case_reader

Workplace case reader [sn_wsd_case.case_reader]	Has read permissions to access all • Workplace tasks • Workplace cases	sn_wsd_core.task_reader
Workplace reservation admin sn_wsd_case.bypass_services_limitation	With this role, user can see all the service items while creating a reservation, even which are in the lead time. User can remove an added service item for an	sn_wsd_case.bypass_services_limitation

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Roles installed with Workplace Case Management (continued)

Role title [name]	Description	Contains roles
	existing reservation, even if it is • Already arranged • In lead time of ordering • When the **Restrict cancellation of requested services** is enabled true. Can configure **Lead time of ordering** at service item or service item location.	

Roles updated by Workplace Case Management

Role	Description	Contains roles
Workplace user [sn_wsd_core.workplace_user]	From Workplace Case Management version 1.21.0, this role has write access to the Workplace Case [sn_wsd_case_workplace_case] table.	None

Tables

Tables installed with Workplace Case Management

Table	Description
Workplace Case [sn_wsd_case_workplace_case]	Extends Workplace Task [sn_wsd_core_workplace_task] table. Stores information about all the Workplace cases in the application. : If **WSD: Archive old workplace tasks** archival rule is applied then Workplace Case [sn_wsd_case_workplace_case] table is also archived. For more information, see Apply the archive rule.

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Tables installed with Workplace Case Management (continued)

Table	Description
Workplace Service [sn_wsd_case_workplace_service]	Extends the Application File table. Stores information about all the Workplace Services in the application.
Workplace Service Activity [sn_wsd_case_workplace_service_activity]	Extends the Application File table. Stores information about all the Workplace Service Activities in the application.
Case Tier Escalation sn_wsd_case_tier_definition	Stores information about all the workplace case escalation rules created in the application.
Fulfillment Instruction sn_wsd_case_fulfillment_instruction	Stores information about all the fulfillment instructions created for workplace services in the application.
Request Service Items [sn_wsd_case_service_item_request]	Stores information about all the workplace service items requested using a workplace service. **Note:** If **WSD: Archive old workplace tasks** archival rule is applied then Request Service Items [sn_wsd_case_service_item_request] table is also archived. For more information, see Apply the archive rule.
Workplace Service Item Location [sn_wsd_case_m2m_service_item_location]	Extends the Workplace Service Location table. Stores information about all the workplace service item locations added in the application.
Workplace Service Location [sn_wsd_case_m2m_service_location]	Stores information about all the workplace service locations.
Workplace Field Mapping [sn_wsd_case_workplace_field_mapping]	Stores information about all the workplace field mappings created in the application.
Workplace Service Item [sn_wsd_case_workplace_service_item]	Stores information about all the workplace service items created in the application.
Workplace Template Configuration [sn_wsd_case_workplace_template_configuration]	Stores information about all the workplace template configurations created in the application.

Properties installed with Workplace Case Management

Customize the properties available with Workplace Case Management.

These properties are available for Workplace Case Management.

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Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Case Management

Property	Description
sn_wsd_case.wsd_inbound_email	Checks for email received for Workplace Case Management. This property is available only for Workplace Case Management version 1.0.1. This property will no longer be available if you upgrade to Workplace Case Management version 1.0.2 or later. This property is available as sn_wsd_core.wsd_inbound_email for Workplace Case Management version 1.0.2 and later. . • Type: String • Default value: askwsd@example.com • Location: System Property [sys_properties] table
sn_wsd_case.acceptance_timeout	If a Workplace case has 'Enable user acceptance' set to True and no 'Acceptance Timeout' specified, this property applies the default timeout to 172800 seconds (two days). • Type: Integer • Default value: 172800 Seconds • Location: System Property [sys_properties] table

Workplace Service form

Use the Workplace Service form to specify details such as the case table, default template, and record producers.

Workplace service form

Field	Description
Service name	Enter a name for the Workplace service.
Case table	Table that is used for the workplace service.
Fulfillment type	Fulfillment type for the workplace service. You can select one of the following values: • **Manual**: Select this option for manual fulfillment. This option enables you to fulfill the request with a human response. • **Service activity**: Select this option to trigger activities to fulfill the workplace service. Save the form to create or update workplace

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Workplace service form (continued)

Field	Description
	service activities. For more information, see Create a Workplace service activity • **Flow**: Select this option to use an existing subflow from the application for fulfillment. For more information about Flows, see Create a subflow. **Note:** If you are creating a custom subflow, ensure that the input fields are set to following: ○ Label: Workplace Case ○ Name: workplace_case ○ Type: Reference.Workplace Case
Automatically close case	Option to close the case automatically if the service activities are closed. This field appears if you select the **Fulfillment type** as **Service Activity**.
Flow	Flow that is used for the workplace service. This field appears if you select the **Fulfillment type** as **Flow**.
Default template	Case template for the workplace service. For more information on templates, refer to Case and Task Templates.
Reinitiate activities on updates	Option to close all child tasks and create them again when a user modifies the workplace service items of a case. If this option is not selected, the requested item record is updated and only the child tasks that have changes are cancelled and created again. Child tasks that are already closed are not created again. If a user modifies the location, date, time, or any other request data, all the child tasks are re-initiated, even if this field is not selected. Selecting this field is helpful if you have service activities like approvals, which must be completed before other activities.
Application	Application that the workplace service is created for.
Active	Option to activate the workplace service.

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Workplace service form (continued)

Field	Description
Available for	Option to specify where the workplace service is available. • **Case**: Select this option to make the workplace service available only to Workplace Case Management users. • **Reservation**: Select this option to make the workplace service available for employees while making a reservation. • **Case and Reservation**: Select this option to make the workplace service available to both Workplace Case Management users and to employees making a reservation. **Note:** The **Reservation** and **Case and Reservation** options appear only if the Workplace Reservation Management application is installed.
Allow request modifications for	Option to specify where users can modify the workplace service requests. You can select the **Case**, **Reservation**, or both options based on your requirement. This field is only available for the sn_wsd_case.admin role.
Allow request modifications	Option to enable modifications of the workplace service requests. This field is available from Workplace Case Management 1.23.1.
Record producers	Record producer through which users can request the workplace service. You can select one or more record producers for a workplace service. The record producer must be created in the Workplace Case Management application.
Record producer for reservation	Record producer to be used while adding extra services to a reservation. This field appears only if the value of the **Available for** field contains reservation. If this field is empty, a generic interface is used while adding or editing extra services for a reservation.

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Workplace service form (continued)

Field	Description
	If services are added using a record producer, the same record producer is used while editing the service till all the items are fulfilled. If the record producer is changed or removed before the items are fulfilled, the earlier record producer is still used while editing the services. If the selected record producer is deleted or made inactive, users will see an error while editing the service items. Users must then contact the administrator or case manager to update the services.
Short description mapping	Record producer field that is used for the short description of the workplace service. This field appears after a record producer is selected for the workplace service.
Allow only single service item selection	Option to restrict users to select only one option within a category from a list of choices. **Note:** This field appears only if Workplace Reservation Management application is installed.
Description	Description about the workplace service that explains the purpose of the workplace service. You can add HTML text or regular text as the description.

Workplace Location Assignment service

The Workplace Location Assignment service automatically assigns a workplace location to an employee.

Workplace Location Assignment is an automated service that analyzes employee data and organizational requirements to suggest workplace locations. This service is primarily used to auto-assign a workplace location for new hires.

The service contains the following activities:

Get suggested workplace location

This activity fetches user details and suggests a location.

1. The activity searches for a workspace that has the same allocation as the employee's manager, team members, or collaborators. The allocation that the activity searches for is based on the *sn_wsd_core.ALLOCATION_TYPE*.

   For example, if the allocation type is set to Cost Center, the system searches for workspaces with the same Cost Center as the collaborators.

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2. If a location with the matching criteria is found and is available, the location details are added to the workplace task. The location is then picked up by the `Assign workplace location` activity.

   If a matching location is a neighborhood, the work notes of the workplace case are updated and the case is closed.

3. If no matching locations are found, the workplace case is updated and the `Manually assign location for new hire` activity is triggered.

Assign workplace location

This activity assigns the recommended location to the employee's workplace profile.

1. The activity searches for the workplace task updated by the `Get suggested workplace location` activity and fetches the recommended location.
2. A workplace profile is created for the employee, and the recommended location is added as a primary assignment.
3. The workplace case is updated.

Manually assign location for new hire

This activity is triggered if no recommended locations are found for the employee. The activity creates a task where a space planner must manually assign a location to the employee.

Workplace Visitor Management

Welcome your guests and off-site employees with a smoother, more hassle-free experience. Use ServiceNow® Workplace Visitor Management to optimize your front-desk operations and welcome your guests and off-site employees. You can register visitors as well as pre-plan what they will require.

Get started

Explore Learn about Workplace Visitor Management concepts and features.	**Configure** Configure the application and setup the visitor-related settings.	**Register** Register visitors such as colleagues or external guests before their arrival.
Manage Manage visitor registrations.	**Analytics and Reporting Solutions** Coordinate work and improve processes with dashboards and reports.	**Reference** Get details about components like fields, tables, and properties.

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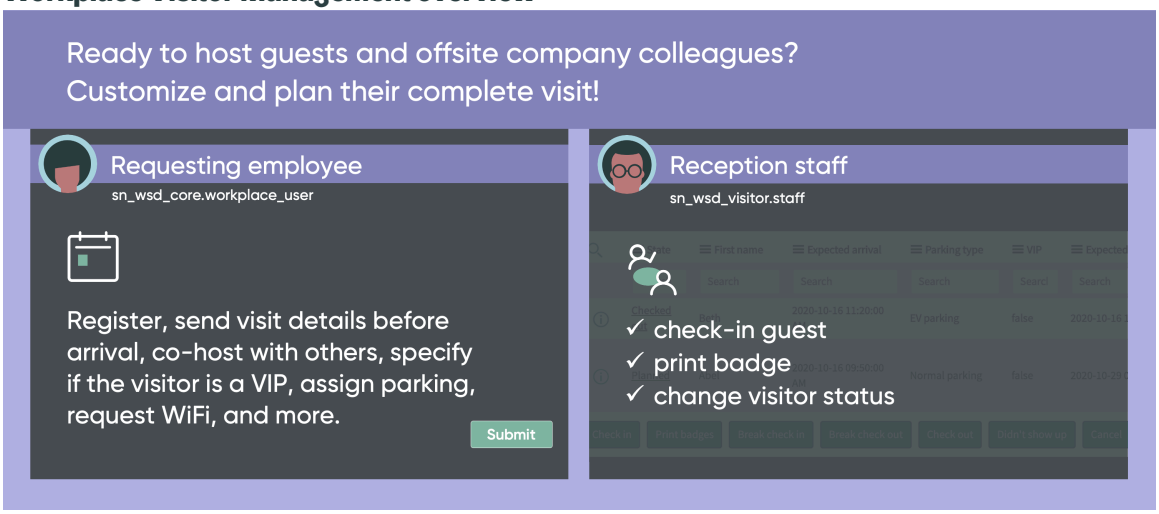
Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Workplace Visitor Management

Welcome your guests and off-site employees with a smoother, more hassle-free experience. Use ServiceNow® Workplace Visitor Management to optimize your front-desk operations and welcome your guests and off-site employees. You can register visitors as well as pre-plan what they will require.

Workplace Visitor Management overview



Employee, admin, and reception staff can use the Workplace Visitor Management application for different purposes.

Register visitors

Employees can register external visitors and off-site company colleagues for a visit. You can specify their visit dates, their parking, and WiFi requirements. You can co-host visitors with others. You can specify if a visitor is a VIP. You can leave a special note to receptionists to customize their visit.

Manage visitor registrations

Admins and reception staffs can manage and update visitor registrations. Using the Workplace Visitor Management, you can view visitors who are currently checked in, expected visitors, the visitors who are on break and the visitors who have checked out. Once the visitors are on the premises, the application allows you to perform the following actions:

- Check in
- Break check out
- Break check in

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- Check out
- Cancel
- Print badges
- Update with no show

Visitor registration

As an employee, the Workplace Visitor Management application enables you to register visitors in advance.

With Workplace Visitor Management, you can do the following:

- Register visitors and specify their visit date, timings, and visiting location.
- Reserve a complete day or a short duration.
- Specify a co-host, especially if you are unavailable.
- Provide any private information to the receptionist if the visitor has special requests.
- Register an off-site colleague.
- Notify the visitors with all the information that they need during their visit.

You can also use the Virtual agent chat support on the Workplace Service Portal to register a visitor and view your visitor registration details. The chat support enables you to do the following:

- Register a guest.
- Know your expected visitors on the current day.
- Know when your visitor is expected to arrive.
- Cancel a registered visitor.
- View the visit logs to know the current state of a visitor.
- Create a visitor policy or modify the existing policy which a visitor must accept before visiting. Enable or disable a visitor policy if it is not a compulsion.
- Check the visitor policy confirmations

Once you submit the registration, the reception staff receives the registration in the application. When visitors are at the premises, the reception staff checks in the visitors, prints their badges, updates their breaks, and updates their other statuses during the day.

For more information about how you can register a visitor, see Make a visitor registration.

Host portal

Use the host portal to manage visits and visitors.

The Host Portal enables employees to manage visits. As a host, you can create, view, and manage visits from the portal. The portal displays a list of visits and a detailed view with visitor information, response status, and pre-check task completion.

As a host, you can use the portal for the following:

- Create single-occurrence or recurring visits
- Specify the visit purpose, location, date and time, and an optional co-host
- Save a visit as a draft and resume editing later
- Add individual visitors or upload a CSV or an Excel file with details of multiple visitors

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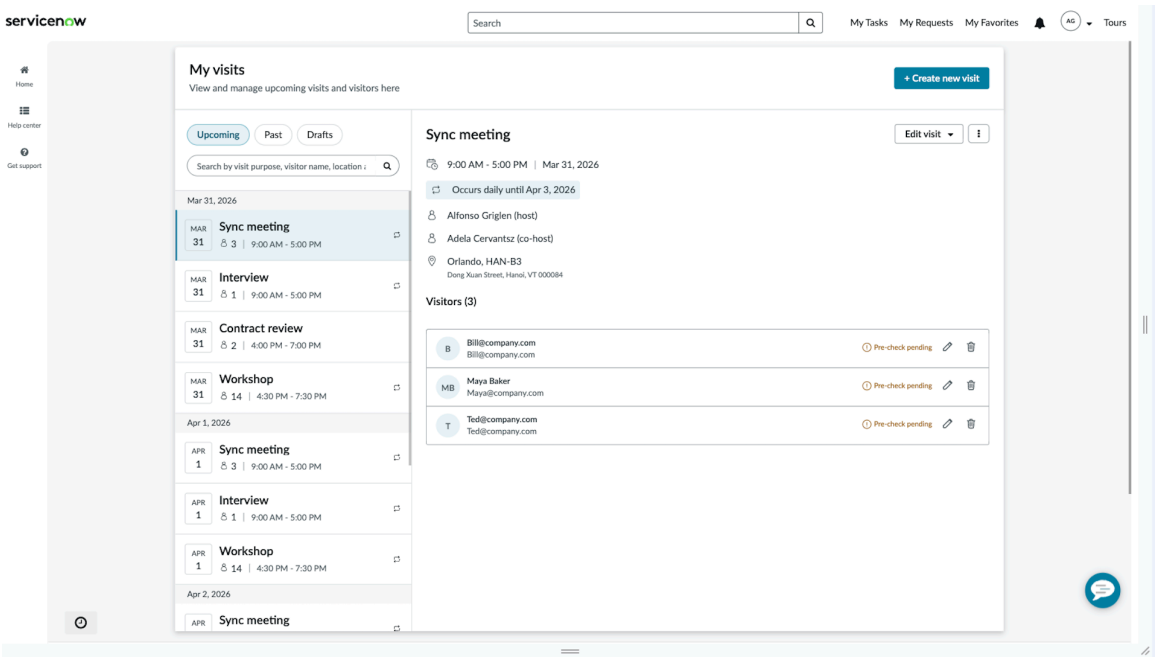
- Remind visitors to respond, edit visitor details, or remove a visitor from a visit
- Edit a single occurrence or an entire series of recurring visits



Receptionist portal

Use the receptionist portal to view and manage visitor activity in your organization.

The receptionist portal is a dedicated interface for the front-desk staff. The portal displays a dashboard with real-time view of all visitor activity at a given building or campus. As a receptionist, you can see the full lifecycle of every expected or active visit for the current day, organized across status columns: Expected, Checked-in, Checked-out, Others, and any custom columns configured by the workplace administrator. You can use the search bar to locate visitors by name, email, host name, or company. You can also use the date navigator to view past or future visits.

Each visitor card on the dashboard displays the visitor name, email, host, the expected or actual visit time, and status like Pre-check pending or Pre-check done. The cards display the most relevant action button for the current state and the details panel contains a context menu for additional actions. For example, a check-in button is displayed for expected visitors who have completed pre-check tasks; an option to mark the visitor as no show is available in the context menu.

As a receptionist, you can perform the following actions:

- Capture visitor details
- Take the visitor's picture with an integrated camera
- Collect policy acknowledgments from the visitors
- Print visitor badges
- Break check-out and check-in for multi-part visits
- Take bulk actions like batch printing of visitor badges

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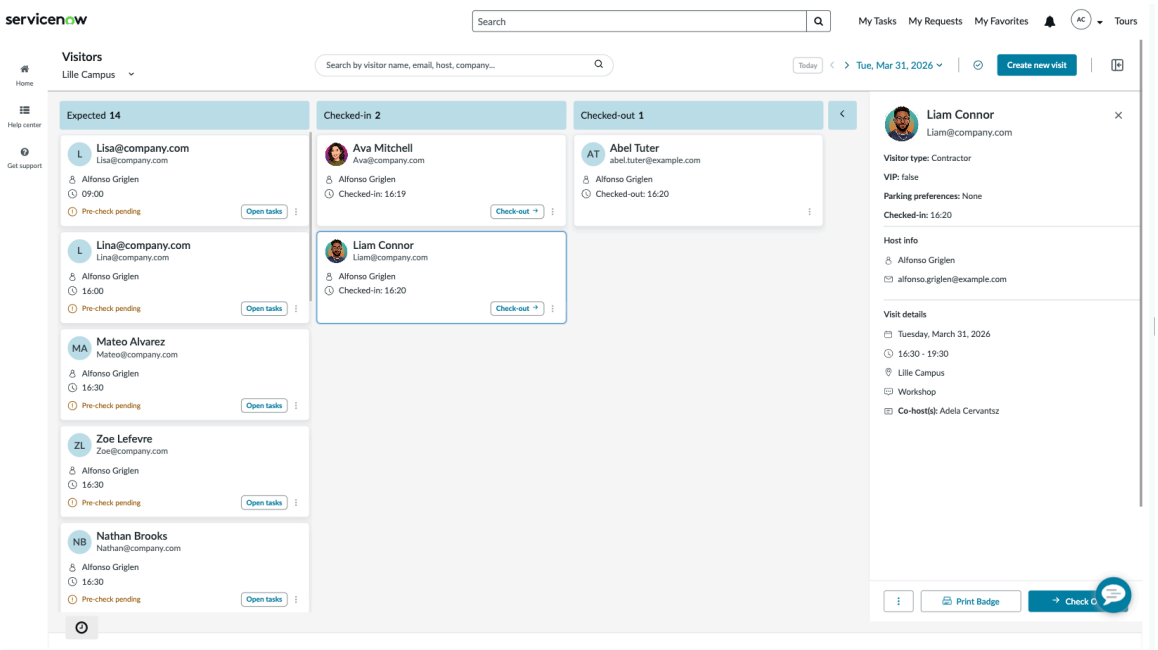

Visitor portal

Use the visitor portal to manage your visits, complete pre-check tasks, and manage personal data.

The Visitor Portal enables visitors to manage their visits to an organization. The portal serves the following types of users:

- Internal visitors: Visitors who already have an account in the instance
- External visitors: Guests who authenticate using a one-time password sent to their registered email

After logging in as a visitor, you can view a personalized dashboard that displays your scheduled visits, RSVP status, pre-check task progress, and profile information.

You can use the pre-check workflow to complete required tasks in advance of your visit. These tasks include adding personal and professional details, uploading a profile picture or ID, and signing any visitor policies. The portal tracks the status of each task and displays them on the visit detail page. For recurring visits, the portal displays all upcoming instances of the event and you can respond, edit your response, or complete pre-check tasks for each occurrence.

The portal also provides profile and data management capabilities. As a visitor, you can view and edit your stored details like parking preferences and contact information. For privacy compliance, you can download a copy of your personal data and anonymize your personal data. Anonymizing your data removes all identifiable information from visit records while retaining the visit history itself.

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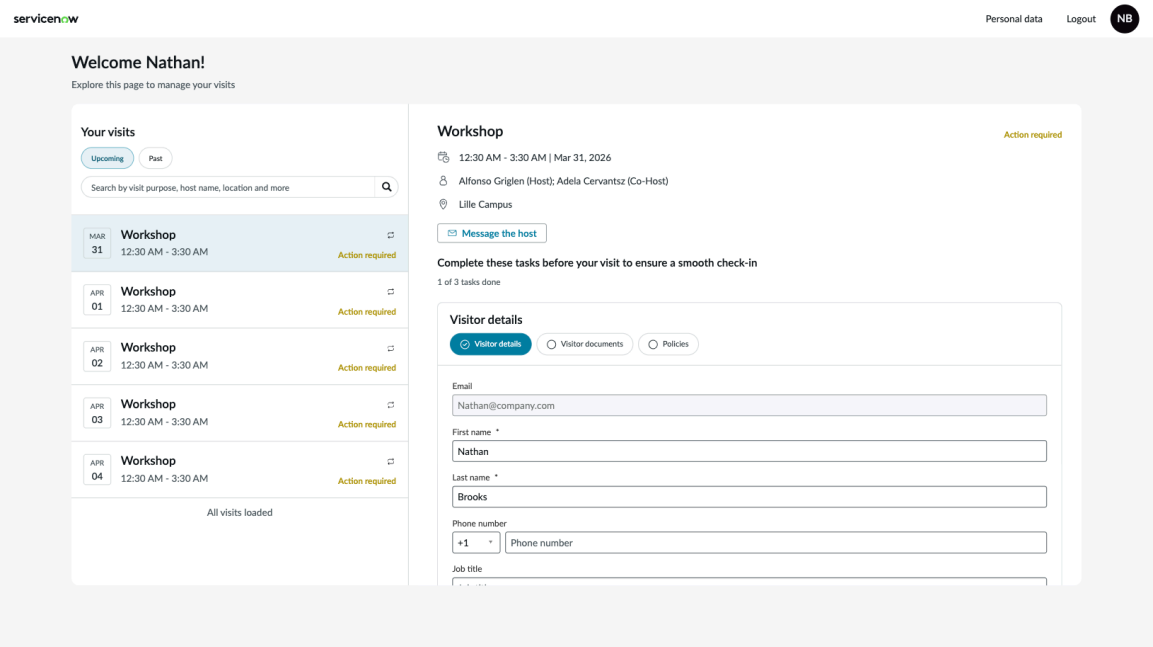

Configuring Workplace Visitor Management

Install the Workplace Visitor Management application and configure visitor registrations related settings.

Install Workplace Visitor Management

Install the Workplace Visitor Management application from ServiceNow Store applications. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions.

1. Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
2. Verify that the following plugins are activated:
   - Workplace Core (sn_wsd_core) minimum version 2.0.3.
   - Workplace Visitor Management (sn_wsd_visitor)

Role required: admin

Use the following details when required:

- Name of the application: Workplace Visitor Management
- ID of the application: sn_wsd_visitor

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   Search for the application by its name (Workplace Visitor Management) or ID (sn_wsd_visitor).
   If you cannot find the application, you may have to request it from ServiceNow store.
3. Click **Install**.

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4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Visitor Management.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Create a visitor policy

Define a policy that must be accepted by a visitor prior to their arrival. Send email notification to the visitor about the policy and enable them to accept the policy by replying to the email.

Before you begin
Role required: sn_wsd_visitor.admin

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visitor Policies**.
2. Select **New**.
3. On the form, fill in the fields.

Policy form fields

Field	Description
Title	Title of the visitor policy.
Active	Option to activate the policy.
Short Description	Short description about the policy.
Description	Detailed description of the policy. Policy content that should be read and accepted by the visitors.

4. Select **Submit**.

Result
The visitor policy is added.

What to do next
Assign the visitor policy to workplace locations.

Assign visitor policy to a workplace location

Add one or more workplace location to a visitor policy. Visitors who are registered to arrive at that locations will receive an email notification in prior to accept the policy.

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Before you begin
Role required: sn_wsd_visitor.admin

About this task
Assign visitor policy to a workplace location.
You can also assign visitor policy by selecting the workplace location in **Building**. Select the building and ensure that the **Visitor policy view** option is enabled. Click **Edit** and assign the policy.

- Go to Building
- Select the building
- Ensure we have the view “Visitor policy view” selected
- Click on Edit to assign the available policies to the location

Procedure
1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visitor Policies**.
2. Select the visitor policy to which you want add the workplace location.
3. In the Locations related list, select **Edit**.
4. On the Edit Members form, select the workplace location from the **Collection** column, then move it to the **Locations List** column by using the add-remove icon ( ).
5. Select **Save**.
6. **Optional:** In the Locations related list, apply the policy to internal or external visitors and configure whether the policies require signatures.

   a. Select the preview icon () for the record that you want to edit.

   b. On the preview window for the location policy, select **Open Record**.

   c. On the Location Policy form, fill in the fields.
   For a description of the field values, see Location Policy form.

Result
The visitor policy is assigned to the selected workplace location.

Create a record producer for visitor management

Make visitor-related services available to employees as a self-service option. Create a record producer to display these services as catalog items in the Workplace Services catalog.

Before you begin
Role required: sn_wsd_visitor.admin

Procedure
1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Record producers**.
2. Click **New**.
3. On the form, fill in the fields.

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Record producer form

Field	Description
Name	Name of the record producer.
Table name	Visitor Registration (sn_wsd_visitor_visitor_registration) table that the record producer is associated with. **Note:** Make sure that the Visitor Registration table for the record producer matches that of the associated workplace service.
Model	Product model table if relevant for the record producer.
Application	This field is set to `Workplace Visitor Management`.
Active	Option to activate the record producer for use.
Expand help for all questions	Select this option to enable users to expand help for all questions.

4. Fill the following tab fields appropriately:
   - **What it will contain**
   - **Accessibility**
   - **Generated Record Data**
   - **Portal Settings**
5. In the **What it will contain** tab, provide the following script:

```
var visitorService = new sn_wsd_visitor.WSDVMVisitorService();
visitorService.createVisitorRegistrationRecord(producer,
 current.sys_id);

producer.portal_redirect = "?id=my_requests";
```

6. In the **Variables** tab, configure the variables for the Workplace Services catalog item as appropriate.

   Variables collect information from the user, and are used to ask questions and map answers to fields.

   To learn more about the different types of variables and how to configure them, see Types of service catalog variables.
7. Click **Submit**.

Result
The record producer is created.

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Configure a visitor type

Create a visitor type that can be used to categorize visitors for your hosts or reception staff.

Before you begin

Role required: sn_wsd_visitor.admin

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visitor types**.
2. On the Visitor types list, select **New**.
3. On the form, fill in the fields.

Visitor type form

Field	Description
Name	Name of the visitor type, like prospect or candidate.
Order	Order of the visitor type in the list while adding visitors. Visitor types with a lower order are displayed first.
Label	Label of the visitor type that is displayed while adding visitors.
Active	Option to set the record to active. Inactive visitor types are not displayed while adding visitors.

4. In the **Available if** field, add conditions for when the visitor type is available.
   For more information about conditions, see Condition builder.

   To include workplace locations within a parent location, you must add conditions to dot-walk from the nested locations to the parent location.

   To include all the buildings, floors, and spaces in the Demo Campus, add the following conditions.

   - `Workplace Location is Demo Campus` OR
   - `Workplace Location.Building.Campus is Demo Campus` OR
   - `Workplace Location.Floor.Campus is Demo Campus` OR
   - `Workplace Location.Space.Campus is Demo Campus`
5. Save the record.
   The visitor type is created and is available to hosts and reception staff members.

Configure visit requirements

Configure requirements that visitors must fulfill for their visit to your organization.

About this task

Visit requirements let you control what information visitors must provide before they check in. You can set different rules based on the location, visitor type, and other conditions.

As an admin, you create visit requirements to define the check-in steps visitors go through.

Each requirement can include the following types of additional information:

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- Extra questions to collect information from the visitor
- Policies or documents the visitor must read and agree to
- Files the visitor must upload, such as a photo

You can also set conditions so that only certain visits trigger a requirement. For example, you might require a photo ID only for visitors arriving at a highly secure campus.

Before you begin

Role required: sn_wsd_visitor.admin

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visit requirements**.
2. On the Visit requirements list, select **New**.
3. On the form, fill in the fields.

Visit requirement form

Field	Description
Name	Name of the requirement.
Is initial requirement	Option to display the requirement on the visit creation page. If this option is selected, the requirement is displayed on the visit creation page to the host and receptionist. Initial requirements are displayed first in the Workplace Services Kiosk self-registration flow. For more information about self-registration, see Self-register as a visitor. Initial requirements are used by the Workplace Concierge agentic workflow to create visits. For more information, see Workplace Concierge agentic workflow. If this option is not selected, the requirements appear later in the visit creation process based the conditions set in the **Apply if** section. For example, a visitor name and email are initial requirements, while a visitor license plate or VIP status can be considered non-initial requirements.
Order	Order of the requirement in the pre-check tasks.
Active	Option to set the record to active.

4. In the **Apply if** field, add conditions for when the requirement is applicable.

   The **Apply if** field is only available if **Is initial requirement** is not selected.

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For more information about conditions, see Condition builder.

To include workplace locations within a parent location, you must add conditions to dot-walk from the nested locations to the parent location.

To include all floors, areas, and spaces in Building A, add the following conditions.

- `Workplace Location is Building A` OR
- `Workplace Location.Floor.Building is Building A` OR
- `Workplace Location.Area.Building is Building A` OR
- `Workplace Location.Space.Building is Building A`

5. Save the record.
   The visit requirement record is created.
6. On the Additional information related list, select **New**.
   You can also select **New** on the Document to acknowledge or Document to upload related list.
7. On the form, fill in the fields.
   For a description of the field values, see Additional requirement form.
8. **Optional:** On the Acknowledgment tab, in the Policy field, select a policy record.

   (Optional) The acknowledgment tab is displayed if the **Requirement type** is `Document to acknowledge`.

   For more information about creating policies, see Create a visitor policy.
9. **Optional:** On the Field mapping tab, select a **Target table** and **Target field** to map the additional information.

   Example
   For example, **Company** information can be mapped to the **Organization** field of the Visitor [sn_wsd_visitor_visitor] table.
10. Select **Submit**.

What to do next

Create more records for additional information based on your preference. You can view the created records in the related lists of the Visit requirement record.

Create a visitor badge template

Create an HTML template that can be used to print badges for your workplace locations.

Before you begin

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visitor badge templates**.
2. On the Html Templates list, select **New**.
3. On the form, fill in the fields.

Html Template form

Field	Description
Name	Name of the HTML template record.
Body	Body of the HTML template.

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Field	Description
	You can use the source code icon (**<>**) to edit the HTML code of the body. You can select fields from the **Select variables** option to add them as variables to the HTML body.
Table	Table that variables for the template are picked from. The Visitor Registration [sn_wsd_visitor_visitor_registration] table is selected by default.
Order	Order of the visitor badge template. A template with a lower order is selected first.

4. **Optional:** In the **Apply if** field, add conditions for when the badge template is applicable. For more information about conditions, see Condition builder.

   Example
   For example, `Visitor type is Client` specifies that the badge is printed for clients.

5. Select **Submit**.
   The badge template record is created.

What to do next
Assign the badge template to a workplace location. For more information, see Assign badge templates to a workplace location.

Assign badge templates to a workplace location

Assign a badge template to a workplace location.

Before you begin
Role required: sn_wsd_visitor.manager, sn_wsd_core.workplace_manager

Procedure
1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visitor badge templates**.
2. On the Html Templates list, select the badge template that you want to use.
3. On the Workplace Locations related list, select **Edit**.
4. From the **Collection** column, select the workplace locations that the template must be assigned to.
5. Move the workplace location to the **Workplace location List** column by using the add-remove icon ( ).

   Note: You can remove workplace locations from the **Workplace location list** column by using the add-remove icon ( ).

6. Select **Save**.

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Result
The badge template is assigned to the selected locations. After a visitor is checked-in, you can print a badge from the visitor registration record.

You can verify the badge template that is assigned to a location in the **Badge template** field of the workplace location record. If the **Badge template** field isn't available on the workplace location record, you can add it by configuring the form layout.

If a location doesn't have an assigned badge template, the nearest template from its location hierarchy is selected while printing a badge. If a template doesn't exist in the hierarchy, the badge template specified in the *sn_wsd_visitor.default_badge_template* system property is selected.

If the visitor picture is not found, a default avatar is used for the badge template. You can change the avatar picture in the *sn_wsd_visitor.visitor_avatar.png* record of the Images [db_image] table.

Configuring Workplace Visitor Management for Workplace Services Kiosk

You can configure pages, check-in flows, check-out flows to integrate Workplace Visitor Management with the Workplace Services Kiosk.

For more information about the Workplace Services Kiosk, see Workplace Services Kiosk.

Configure pages for Workplace Services Kiosk

Configure pages that you want to display for check-in or check-out flows on the Workplace Services Kiosk.

Before you begin
Role required: sn_wsd_visitor.admin

Procedure
1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Page Configurations**.
2. On the Kiosk Page Configurations list, select **New**.
3. On the Kiosk Page Configuration form, fill in the fields.
   For a description of the field values, see Kiosk Page Configuration form.

   Important: If the visitor policies for the acknowledgment page contain hyperlinks, visitors can use the links to leave the kiosk environment and they cannot return to the kiosk. The kiosk operator must reload the kiosk environment by using the kiosk URL.

4. Save the record.

What to do next
Pages that have the Authentication or End page type can be further customized by using the related lists. For more information, see Kiosk Page Customizations.

Create a flow for Workplace Services Kiosk

Create a check-in or check-out flow for the Workplace Service Kiosk.

Before you begin
Role required: sn_wsd_visitor.admin

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Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration**.
2. Select either of the following modules based on your requirement.
   - Check-in Flows
   - Check-out Flows

   Note: The visit requirements are displayed during the check-in flow. Initial requirements are displayed first, non-initial requirements are displayed later.

   Based on your selected module, either the Kiosk Check-in Flow Configurations list or Kiosk Check-out Flow Configurations list opens.
3. On the list, select **New**.
4. On the form, fill in the fields.
   For a description of the field values, see one of the following topics based on the selected module.
   - Kiosk Check-in Flow Configuration form
   - Kiosk Check-out Flow Configuration form

Quick start test for Workplace Visitor Management

Validate Workplace Visitor Management after any configuration change such as an upgrade or after developing a functionality. Copy and customize these quick start test when using your instance-specific data.

All test suite and test should be run on a default implementation. To validate a custom implementation, copy the automated test and configure it for your customization.

By default, the Quick start test is disabled and a read-only test template. The quick start test provides a pass result only when you run it with the demo data or feature plugin.

Copy and configure the quick start test to produce a pass result when you run it with your instance-specific data.

The Agile Development 2.0 (com.snc.sdlc.agile.2.0) and the Agile Development 2.0 - ATF Tests (com.snc.sdlc.agile.2.0.atf) plugins must be enabled.

Note: When running the quick start test, demo data is required.

Workplace Visitor Management

Workplace Visitor Management quick start tests require activating the Workplace Visitor Management.

Workplace Visitor Management

Test	Description	Release version
Test Register Guest	Ensure that the workplace users or employees can access the record producer and that the form has all the mandatory field values before submitting the record.	Washington DC

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Run quick start test for Workplace Visitor Management

Workplace Visitor Management provides quick start test that you can run on your instance.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Automated Test Framework** > **Tests**.
2. Search and select the quick start test you want to run.
   For information on available quick start test, see Quick start test for Workplace Visitor Management.
3. Select **Run Test**.
   The **Test Steps** tab provides steps for running the quick start test.
   After running the test, the **Step Results** tab shows the status of test steps. Screen shots also appear at the top of the form as attachments.

Registering a visitor

Submit a visitor registration to register your invitees before their visit to the organization. As a visitor, accept or decline visitor policies based on your preference.

Use the host portal

Use the host portal to create, view, and manage visits; add visitors and optional co-hosts.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center**.
2. On the Employee Center portal, select **Help Center** > **Workplace Services**.
3. From the Workplace Services, select **Open my visit list**.
   The host portal page opens with a list of upcoming visits.
4. Perform any of the following actions based on your preference.

Action	Steps
Manage visits	Select any of the following options: ○ **Upcoming**: Displays upcoming visits in a chronological order starting from the cur rent day. ○ **Past**: Displays past visits in a reverse chronological order starting from the cur rent day. ○ **Drafts**: Displays visits that are saved for lat er. You can edit and submit draft visits. You can select a visit to view its details. You can also edit or cancel a visit based on your preference.
Manage visitors	After selecting a visit, you can view, edit, or re move visitors.

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Action	Steps
	○ You can view the status of the pre-check tasks for every visitor. Selecting the pending tasks displays the tasks that the visitor hasn't completed. ○ You can remove the visitor by selecting **Delete visitor** in the Actions column. ○ On the visit details page, you can edit a visi tor's details or remove the visitor.
Create a visit	**a.** Select **Create new visit**. **b.** On the New visit form, fill in the fields. For a description of the field values, see New visit form. **Note:** The fields are based on the ini tial requirements configured by the ad min. **c.** Select **Create Visit**. **d.** Add internal or external visitors. For more information about adding visitors, see Adding visitors. **e.** Select **Confirm**.
Edit a visit	**a.** Select an upcoming or draft visit. **b.** On the visit details panel, select **Edit visit**. For recurring visits, you can edit a single oc currence or all occurrences. **c.** On the Edit visit form, fill in the fields. The fields are the same as creating a vis it. For a description of the field values, see New visit form. **d.** Select **Save changes**. **e.** Add, edit, or remove visitors. (Optional) For more information about adding visitors, see Adding visitors. **f.** Select **Confirm**.

Adding visitors

Add a single visitor or upload a file with details of multiple visitors.

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Add a visitor

Add a visitor by providing details like their name and email.

Before you begin
Role required: sn_wsd_visitor.staff or sn_wsd_core.workplace_user

Procedure

1. On the Visit details page, select **Add visitor**.
2. On the Add Visitor pop-up, enter the **Email** of the visitor.
   For an internal visitor, the email must match a system user. Otherwise, the visitor is an external visitor.

   Important: For internal visitors, fields like the first name, last name, email, and phone number are automatically filled based on the system users table and are not editable. Additional information like license plate or parking type, which are not stored in the system users table, can be edited.

3. Select the **Visitor type** based on your requirement.
4. Select **Add visitor**.
5. Fill in the visitor details, then select **Save**.
   Alternatively, you can select **Cancel** to add the visitor with their email address.

   The visitor can fill in their details and complete their pre-check tasks on the visitor portal or at the receptionist desk.

Add visitors using a file

Add multiple visitors by uploading a CSV or Excel file with the visitor details.

Before you begin
Role required: sn_wsd_visitor.staff or sn_wsd_core.workplace_user

Procedure

1. On the Visit details page, in the Visitors section, select the ellipsis icon, then download a template based on your preference.
   You can download a CSV or an Excel template.
2. In the downloaded file, fill in the columns with your visitor details.
   First name, Last name, Email, and Visitor type are required columns.
3. From the **Add visitor** context menu, select **Add visitors using a file**.
4. Select the CSV or Excel file to upload the visitors.
   The system takes a few seconds to fetch details from the file and display the visitors and their details.

   If any required fields are missing for a visitor, the system displays them on the visitor row. You can edit the visitor to provide the required details.

   Alternatively, the visitor can provide their details at the receptionist desk.

Make a visitor registration

Pre-plan your visitor or off-site colleagues visit. Specify their visit details like date, time, location, and more.

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Before you begin

Important: Starting with Workplace Core (sn_wsd_core) version 2.1, all updates, and new features are available only on the Workplace Service Portal. The workplace services provided by ServiceNow® are removed from the Service Portal on Workplace Core (sn_wsd_core) beginning with version 2.1. To configure the Workplace service catalog in the Service Portal, see Configure a catalog in Service Portal.

Role required: sn_wsd_core.workplace_user

About this task

Submit this request to register a guest. Specify if there are any additional requirements for the visit as a private note to the reception staff.

Workplace Visitor Management admin and reception staff can also register visitors directly from the application. Navigate to **Workplace Visitor Management** > **Reception Staff** > **Register Visitors**.

You can also register a visitor using the Virtual agent chat support. Navigate to **Workplace Core** > **Workplace service portal** > **Workplace Service Portal Home** and select the chat icon . Enter your question or select **Show Me Everything** to select from a list of available options to register a visitor.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.

   Note: You can also raise a request from the Employee Center. On the home page, navigate to **Workplace** > **Browse all Workplace** and select the workplace service.

2. Open the **Visitor Management** category.

   a. Select **Catalog**.

   b. Select **Browse by Categories**.

   c. In the Workplace Services Catalog, select **Visitor Management**.

      Note: If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **Visitor Management**.

3. Select **Register a guest**.
4. On the form, fill in the fields.

   Important: The date and time fields are in the time zone of the selected location.

Register a guest form

Field	Description
Visit description	Description with details about the purpose of the visit.
Location	The location of the visit.
Host	The name of the host of the visitor. By default, the field is set to your name.

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Field	Description
Arrival date and time	Date and arrival time of the visit, shown as the arrival date and time icon .
Departure date and time	This field is automatically set to one hour after the arrival date and time. You can change this field by selecting your own time using the departure date and time icon ().
All-day invitation	Option for visits that last for an entire day.
Recurring invitation	Option to make a recurring invitation for the visitor. For recurring invitations, you can configure the following fields: ○ Repeat: Frequency of the recurring invitation. It can be **Daily**, **Weekly**, or **Monthly**. ○ Lasts: How long the recurring invitation lasts. You can the following values. ▪ For: Specifies how long the invitation lasts based on the **Number of days** field. ▪ Until: Specifies when the invitation expires based on the **Ends on this date** field.
Private note to receptionist	Additional requirements or a private note to the receptionist.
Co-hosts	Co-hosts for the visitor. The co-hosts and the main host are notified about the registration.

5. Select **Add an external visitor**, to add a visitor.

   a. Select **Add**.

   b. On the form, fill in the fields.

Add an external visitor form

Select a known visitor	Option for selecting from a list of known visitors if the visitor has visited before. This selection automatically sets the name, email, and other relevant information of the visitor.
Visitor type	The type of visitor.
First name	The visitor's first name.
Last name	The visitor's last name.
Title	A title for the visitor if necessary.
Visitor's email	The visitor's email address.

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Visitor's phone number	The visitor's contact number.
Organization	The organization of the visitor.
Wifi	Option for giving WiFi access to the visitor.
VIP	Option for marking the visitor as an important person (VIP). This option helps the receptionist to prioritize the visitor.
Parking preferences	The visitor's parking preference.
License plate	The visitor's license plate details.

c. Select **Add**.

You can edit or remove a row from the form table using the add-remove row icon).

6. Select **Add a company employee**, to add a colleague.

a. Select **Add**.

b. On the form, fill in the fields.

Add a company employee form

Select a colleague	The name of your colleague. The **First name**, **Last name**, and **Email** fields are automatically set. To edit any details, select the preview record icon and **Save** the changes.
Email	This field automatically sets t with the email address of the selected colleague. You can edit it.
Parking Type	The colleague's parking preference.
License plate	The colleague's license plate details.

c. Select **Add**.

You can edit or remove a row from the form table using the Add-remove row icon .

7. **Optional:** Bulk upload a list of visitors by using an Excel or CSV file.

a. Select **Add visitors using a file**.

b. Download the CSV or Excel template based on your preference.

c. In the downloaded file, fill in the visitor information.
The columns in the file correspond to the fields in the **Add an external visitor** form. The visitor email column is required. If the visitor email is empty for any row, it's skipped.

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Note: You can only add 50 internal visitors and 50 external visitors in one file. If you want to increase the number of rows that can be imported, configure the global property `glide.sc.multirow_set.rows.size` and set it to the desired value which will apply to all portals. For more information, see https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB0818277.

d. Upload the file from your system by selecting **Upload**.
The system displays invalid information in the **Invalid values** column. Ensure that you fix the issues before submitting the request.

You can edit or remove a row from the form table using the add-remove row icon.

8. In the **Notification preferences** section, select the channel to be notified on when the visitor checks into the building.
You can link the Virtual Agent with other channels like Microsoft Teams or Slack. For more information, see Integrating Virtual Agent with other channels.
9. Select **Submit**.

Result
Your visitor registration is submitted and you can view your requests. The details about the visit are sent to the visitor's email address. The visitors also receive a reminder email with the invite code on the day before the registered date. For recurring invitations, only one email is sent for the visit details, but reminder emails are sent a day before every visit.

If any visitor policies are applicable for the visit, the email sent to the visitor contains options to accept or decline the policies. If the visitor declines the policies in the email, they can still accept them while checking in through the Workplace Services Kiosk. For more information about the kiosk check-in process, see Check in using an invite.

What to do next
You can check the details of your request. You can also edit or cancel the request.

- You can view your requests by following one of the following steps.
  - On the Employee Center, go to the Requests tab to view your requests and reservations.
  - On the Now Mobile app navigation bar, select **For Me** and scroll down to the My Request section to view your requests.
  - In the virtual agent chat, enter your question or select **Show Me Everything** to select from a list of available options to view your visitor details.
- On the request details screen, you can cancel a request by selecting **Cancel Request**.
- You can search for registered visitors in the **Visitors list** using the search option.

Review visitor policies

Review the workplace policies before your visit, then accept or decline the policies.

Before you begin
Role required: none

About this task
When you register a visit to a workplace, or if someone creates a visitor registration on your behalf, you might receive an email about reviewing the workplace policies. You can review and accept the policies based on your preference.

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You can also accept the policies on the Workplace Services Kiosk during the visitor check-in process. For more information about the kiosk check-in process, see Check in using an invite.

Note: If you accept the policies before your visit, the policies aren't displayed during the kiosk check-in process.

Procedure

1. Open the email that you received about the workplace policies.
2. Accept or decline the visitor policies based on your preference.

Choice	Steps
Accept the policies	**a.** In the workplace policies email, select **Read and sign policies**. The Visitor Policies page opens with details about all visitor policies. **b.** Review the policies, then select **Agree**. Based on the configuration set by the ad min, you might have to add a signature to agree to the policies.
Decline the policies	You can decline the policies from the email by selecting **Decline policies**. You can also decline the policies after review ing them on the Visitor Policies page by se lecting **Decline**. A page opens confirming that you have de clined the policies. You can review the poli cies again by selecting **Go back**.

Using the visitor portal

Use the visitor portal to manage your visits, complete pre-check tasks, and manage personal data.

Logging in to the visitor portal

Log in to the visitor portal as an internal user or an external user.

Log in as an internal visitor

As an internal visitor, you can login using your instance credentials or using single sign-on.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Open the visit details email that you received for your visit.
2. In the email, select the **visitor portal** link.
   The visitor portal opens with the login page displayed by default.

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3. Enter your username and password, then select **Login**.
   Alternatively, you can use single sign-on (SSO) if it's supported by your organization.

Log in as an external visitor

As an external visitor, you can login using your registered email and a one-time pass-code.

Before you begin
Role required: None

Procedure

1. Open the visit details email that you received for your visit.
2. In the email, select the **visitor portal** link.
   The visitor portal opens with the login page displayed by default.
3. Enter your registered email address, then select **Send verification code**.
   The system sends a one-time pass-code to the email address.
4. On the visitor portal, enter the pass-code that you received, then select **Verify**.
   If you didn't receive the pass-code, select **Resend code** to send another code to the email.

   Alternatively, you can select a different email address by selecting **Use a different email**.

Complete pre-check tasks

Complete the pre-check tasks before your visit to ensure a smooth check-in when you visit the meeting location.

Before you begin
Role required: None

Procedure

1. Log in to the visitor portal, then select a visit.
   For more information about logging in to the visitor portal, see Logging in to the visitor portal.

   You can select **Message the host** to send an email to the host.
2. In the Visitor Details section, fill in your details, then select **Save and next**.
   Your first name and last name are required by default. Additional fields might be required based on the requirements set by the admin.
3. In the Visitor Documents section, upload the required images, then select **Save and next**.
   You can either upload pictures or take pictures using your device camera.

   Your picture and additional pictures or documents might be required based on the organization policies.
4. In the Policies section, read the policies, then select the acknowledgment box.
   You might have to provide a signature based on the requirements set by the admin.
5. Select **Save**.
   You can edit the provided information by selecting **Edit tasks**.

What to do next
The information that you provided is saved with the organization. You can manage your data from the visitor portal. For more information about managing your data, see Manage your visitor data.

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Manage your visitor data

Download or anonymize your data on the visitor portal.

Before you begin
Role required: None

Procedure

1. Log in to the visitor portal, then select a visit.
   For more information about logging in to the visitor portal, see Logging in to the visitor portal.
2. Select your profile icon, then select either of the following options.

Choice	Description
Download your data	Downloads the data to your local system or device.
Anonymize your data	Removes all identifiable information from the visit records while retaining the visit history.

Note: If you anonymize your data, the data in your future visits is replaced with random values. You must enter your data again on your next visit.

Managing visitor registrations

As an admin and as a reception staff, you can track visitor registrations and update their status while the visitors are on the premises.

As an admin and as a reception staff, you can perform the following actions on visitor registrations:

- Register visitors using the application as well as the service portal.
- View all the visitor registrations.
- View any visitor registrations for the current day or which were created by you.
- Create visitor-related services for your employees as a self-service.
- Monitor visitor registrations using the Visitor Reception Dashboard.
- Create visitor policies and assign it to workplace locations.

As an admin, you can also view visit logs containing details about the state changes for the visitor registrations.

Use the receptionist portal

Use the receptionist portal to manage visitor activity in your workplace.

Before you begin
Role required: sn_wsd_visitor.staff

Procedure

1. Navigate to **All** > **Self-service** > **Employee Center**.
2. On the Employee Center portal, select **Help Center** > **Workplace Services**.
3. From the Workplace Services, select **Manage receptionist desk**.
   The receptionist portal page opens with a dashboard of visits for the current day.

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4. **Optional:** Change the location of the portal from the location list under the `Visitors` header label.
   The locations in the list are fetched from the workplace profile of the receptionist. The primary workplace location is selected by default.
5. Perform any of the following actions based on your preference.

Action	Steps
View visitor details	Select a visitor to view their details in the de tails panel. You can also search for the visitor using the visitor name, email, or host. The following details are displayed on the panel: ○ Visitor name ○ Visitor email ○ Pre-check tasks status ○ Host info like the host's name and email ○ Visit details like the date, time, location, and purpose **Note:** You can set the visibility of the details panel as persistent by selecting the expand details panel icon ().
View other visitor states	**a.** On the receptionist portal, expand the **Oth ers** column. **b.** Select the filters icon, then select the states you want to include in the column. ▪ Cancelled ▪ Completed ▪ Disappeared ▪ No Show
Select multiple visitors	Use the `Command` or `Ctrl` key to select multi ple visitors. You can perform actions like check-in, check-out, or print badges for all the selected visi tors.
Complete pre-check tasks	**a.** Select a visitor from the Expected column. The visitor must have the `Pre - check pending` status. **b.** On the details panel, select **Open tasks**. **c.** Ensure that the visitor completes the follow ing tasks.

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Action	Steps
	▪ Visitor Details: Fill in the details of the visitor. The First name and Last name are required. ▪ Visitor Documents: Upload or take a picture of the visitor and their ID. ▪ Sign Policies: Ensure that the visitor reads and acknowledges the policies. The visitor might have to provide a signature based on the configuration set by the admin.
Check-in a visitor	**a.** Select visitors from the Expected column. **b.** Verify that the visitor has completed their pre check-in tasks. If the pre-check is not complete, the visitor can complete their tasks on the portal. **c.** On the visitor card or the details panel, select **Check in**. Alternatively, you can drag the visitor card into the checked in visitors column. You can undo a check-in by selecting **Undo Check-In** from the context menu in the details panel.
Start a break	**a.** Select visitors from the Checked-In column. **b.** On the details panel, from the context menu, select **Start break**. Visitors who are on break are displayed in the checked-out column.
End a break	**a.** Select visitors who are on break from the Checked-Out column. **b.** On the details panel, from the context menu, select **End break**. Visitors who end their break are moved to the checked-in column.
Print visitor badges	**a.** Select visitors from the Checked-In column. **b.** On the details panel, select **Print Badge**.

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Action	Steps
	A badge with the visitor details is displayed in a new browser tab. **c.** Print the badge by using your web brows er's print options.
Check-out a visitor	**a.** Select the visitor from the Checked-In col umn. **b.** On the visitor card or the details panel, se lect **Check out**. Alternatively, you can drag the visitor card into the checked out visitors column.
Create a visit	**a.** Select **Create new visit**. **b.** On the New visit form, fill in the fields. For a description of the field values, see New visit form. **c.** Select **Create Visit**. **d.** Add internal or external visitors. For more information about adding visitors, see Adding visitors. **e.** Select **Confirm**.

Update a visitor registration

Track visitor registrations and update the status of a visitor while the visitor is on the premises.

Before you begin

Role required: sn_wsd_visitor.admin or sn_wsd_visitor.staff

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Visitor Overview** > **All visitor registrations**.
2. Select any of the following options to update the visitor registration.
   - **All Visitor Registrations**
   - **My Visitor Registrations**
   - **Today's Registrations**
3. Select the visitor registration which you want to update.
4. **Optional:** Select multiple registrations if you want to update them with the same status.
5. Based on the state change that you want to make, select any of the following options.

Option	Description
Check in	Check in the visitor when they enter the premises.

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Option	Description
Take a picture	Take a picture of the visitor and store it in the visitor details tab of the record.
Print badges	Print a badge for the visitor. A preview of the badge is displayed before you print.
Break check out	Check out the visitor when the visitor leaves the premises for a break.
Break check in	Check in the visitor when the visitor is back to the premises after a break.
Check out	Check out the visitor when the visitor leaves the premises and ends the visit.
Didn't show up	The visitor did not show up.
Cancel	Cancel the visitor registration.

For more information about different states and about allowed state changes on a visitor registration, see Visitor registration states.

Result
The status of the visitor registration is updated.

View visitor registrations

View visitor registrations submitted through the service portal. You can view all visitor registrations, the ones for the current day, and the ones that were made by you.

Before you begin
Role required: sn_wsd_visitor.admin or sn_wsd_visitor.staff

- A reception staff can update the state of the visitor registration.
- You can print badges from anywhere in the Workplace Visitor Management application.

Procedure
1. Navigate to **All** > **Workplace Visitor Management** > **Visitor Overview**.
2. Select any of the following options to view visitor registrations:
   - **All Visitor Registrations**: Select this option to view all the visitor registrations made through the application.
   - **My Visitor Registrations**: Select this option to view the visitor registrations that you created.
   - **Today's Registrations**: Select this option to view the current day's visitor registrations.
3. Select a visitor registration to view its details.

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- The Visit Details tab contains information like the location, host, co-hosts, arrival, and departure times.
- The Visitor Details tab contains the visitor's information like the name, email address, phone number, and consent.
- The Visitor Services tab contains information like the parking type and license plate, and whether the visitor is a VIP or requires WiFi.

You can also see whether the visitor has accepted or declined the visitor policies by selecting the record in the Visitor Policy Confirmation related list. For more information about visitor policy confirmations, see View visitor policy confirmations.

View visitor policy confirmations

View policy confirmations that were submitted by the visitors.

Before you begin

Role required: sn_wsd_visitor.staff

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visitor policy confirmations**.
   You can also navigate to the Visitor registration record of the visitor.
2. From the Visitor Policy Confirmations list, select the record that you want to view.
3. View the details about the Visitor Policy Confirmation.

Note: For policies that require a signature, the signature is attached to the record as an image. If the admin anonymizes the visitor, the signature is removed from the record.

Visitor Policy Confirmation record

Field	Description
Visitor registration	Visitor registration record that contains information about the visit, visitor, and visitor services.
Invitation	Invitation record linked to the visit.
Location policy	Policies that are linked to the location of the visit.
Active	Option to activate the record.
State	State of the policy confirmation. This field is automatically updated based on whether the visitor has accepted, declined, or not responded to the policies.

Visitor registration states

The visitor logs display the current state of visitor registrations. These states can be changed to other states.

The different states of a visitor registration are explained as follows.

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Visitor registration states

State	Description
Planned	This is the initial state of a visitor registration after it is created. This state can be changed to the following states: • Check-in • Cancel • Didn't show up
Checked in	The visitor is checked in by the reception staff. This state can be changed to the following states • Check out • Break check out You can print a visitor badge by selecting **Print badge**.
Checked out	The visitor is checked out by the reception staff.
Break checked in	The visitor is checked in by the reception staff after the visitor returned from a break.
Break checked out	The visitor is checked out by the reception staff after the visitor went on a break. This state can be updated to the following states • Break check in • Check out
Completed	The visitor has completed the visit and checked out.
Cancelled	The visitor registration is cancelled.
No show	The visitor didn't show up.
Disappeared	There is no update about the visitor or has checked out without updating the reception staff.

Anonymize a visitor

As an admin, you can anonymize a visitor to delete the visitor record and all the details of the visitor. Any future registrations of the visitor are canceled.

Before you begin

Role required: sn_wsd_visitor.admin

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About this task

As an admin, you can anonymize a visitor. Employees can request to anonymize a visitor due to security reasons or for any other reason.

When you anonymize a visitor, the visitor record is deleted. In all current visitor registrations, the visitor data is replaced with a random value. Any future registrations of the visitor are canceled.

Note:

- If you have installed Workplace Services Kiosk, any visitor pictures and signatures are removed when you anonymize a visitor.
- After you anonymize a visitor, the visitor details must be deleted from the audit records for one time. To automatically delete the details from the audit records, a fixed script is provided along with the application on the store. Download the fixed script *WSD_Fix_Visitor_Anonymize_data.xml* attached with the Workplace Visitor Management application from the ServiceNow Store under the supporting documents.

Procedure

1. Navigate to **System Definition** > **Tables**.
2. Search for the Visitor [sn_wsd_visitor_visitor] table.
   - In the **Label** field, type `Visitor`.
   - In the **Name** field, type `sn_wsd_visitor_visitor`.
3. Select the Visitor [sn_wsd_visitor_visitor] table.
4. Under Related links, select **Show List**.
5. **Optional:** In the application **Filter navigator**, type `sn_wsd_visitor_visitor.list` and search.
6. From the list of visitors, select the visitor that you want to anonymize.
7. On the visitor form, select **Anonymize Visitor Data**.
8. In the Confirmation dialog box, click **OK**.

Result

The visitor is anonymized and all the details of the visitor are deleted. Any future registrations for the visitor are canceled, and the data in the fields is replaced with random values.

Apply visitor management archive policy

Apply the archival policy for Workplace Visitor Management. The archival policy will archive old visitor records and visitor registration records that are more than one year old.

Before you begin

The archival policy improves performance and controls table size growth by archiving old data.

Role required: admin

Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. In the Archival Rules search box, filter by **WSD**.
   WSD (Workplace Service Delivery).
3. Select and click open the following visitor management archival rules in edit mode as required:

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- **WSD: Archive 1 year old Visit record**: Archives one-year old visitor records for the past one year in Workplace Visitor Management.
- **WSD: Archive 1 year old Visit registration**: Archives one-year old visitor registration records in Workplace Visitor Management.

4. Select the **Active** check box to activate the archival policy for a selected table.
5. Apply the required filter conditions.
6. Select **Recalculate Estimate** to know the records eligible for archiving.
7. Select **Run Archive Now** under related links to run the archival rule.

Workplace Visitor Management references

Learn more about the role, tables and system properties installed with the Workplace Visitor Management application.

Components installed with Workplace Visitor Management

Several types of components are installed with the Workplace Visitor Management application, including tables, user roles, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed with Workplace Visitor Management

Roles installed with Workplace Visitor Management

Role title [name]	Description	Contains roles
Workplace visitors admin [sn_wsd_visitor.admin]	As an admin, you can: • Has complete access to the application. • Perform all actions of a Visitor manager. • Access visitor logs. • Configure application settings. • View and manage the related record producers.	• sn_wsd_visitor.manager • catalog_editor • catalog_admin
Workplace visitors manager [sn_wsd_visitor.manager]	As a manager, you can: • Perform all actions of a Visitor staff. • Create, review and assign visitor policies that a visitor must accept before visiting the location. • View, manage, and update visitor registrations.	sn_wsd_visitor.staff

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Roles installed with Workplace Visitor Management (continued)

Role title [name]	Description	Contains roles
	• View the Visitor Reception Dashboard. • Register visitors.	
Workplace reception staff [sn_wsd_visitor.staff]	As a reception staff, you can: • View, manage, and update visitor registrations. • View and update visitor records. • Register visitors • View the Visitor Reception Dashboard. • Print badges for visitors.	sn_wsd_core.workplace_user

Tables installed with Workplace Visitor Management

Tables installed with Workplace Visitor Management

Table	Description
User Visitor [sn_wsd_visitor_m2m_user_visitor]	Stores information about the link between a visitor and an employee. The employee must have specified this information while registering the visitor.
Organization [sn_wsd_visitor_organization]	Stores information about the visitor's organization, such as the organization's name and description.
Visit [sn_wsd_visitor_visit]	Stores information about the visit. Each visitor is linked to a visit. A visit can hold multiple visitors.
Visitor [sn_wsd_visitor_visitor]	Stores information about all the visitors who have visited. An employee can reuse the visitor details for future registrations.
Visitor Registration [sn_wsd_visitor_visitor_registration]	Stores information about all the visitor registrations created in the application.
Visit Log [sn_wsd_visitor_visit_log]	Stores information about the state changes that were logged during a visit.
Policy [sn_wsd_visitor_policy]	Stores information about all the visitor policies created in the application.

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Tables installed with Workplace Visitor Management (continued)

Table	Description
Location Policy [sn_wsd_visitor_m2m_location_policy]	Stores information about the visitor policies added to workplace locations.
Visitor Policy Confirmation [sn_wsd_visitor_visitor_policy_confirmation]	Stores information about all the confirmations received for a visitor policy.
Invitations [sn_wsd_visitor_invitation]	Stores information about all the invitations and the linked visit records.
Kiosk Page Configurations [sn_wsd_visitor_page_configuration]	Stores information about the pages created for Workplace Services Kiosk.
Kiosk Checkin Flow Configurations [sn_wsd_visitor_checkin_flow_configuration]	Stores information about the check-in flows created for Workplace Services Kiosk.
Kiosk Checkout Flow Configurations [sn_wsd_visitor_checkout_flow_configuration]	Stores information about the check-out flows created for Workplace Services Kiosk.
Kiosk Authentication Option [sn_wsd_visitor_authentication_option]	Stores information about the authentication options created for the Workplace Services Kiosk.
Visitor Authentication Option [sn_wsd_visitor_page_m2m_authentication_option]	Stores information about authentication options added to an authentication page configuration.
Kiosk Next Step [sn_wsd_visitor_next_step]	Store information about the next steps added to an end page configuration.

Properties installed with Workplace Visitor Management

There are several properties available with Workplace Visitor Management.

Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Visitor Management

Property	Description
sn_wsd_visitor.policy_response_due_in_days	This property enables you to send emails to visitors to remind them to submit their visitor policy acceptance or rejection. If a visitor doesn't respond, the reception staff is notified to check the same when the visitor visits the reception desk.

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Properties for Workplace Visitor Management (continued)

Property	Description
	Note: The visitor registration isn't canceled if the visitor doesn't provide their response toward visitor policy. • Type: integer • Default value: **1**
sn_wsd_visitor.visitor_inbound_email	This property enables you to specify a generic email address to send or receive visitor requests. • Type: string • Default value: **askvisitor@example.com**
sn_imt_core.visitor_syncing	This property enables visitor synchronization between the Safe Workplace and Workplace Visitor Management applications. When a visitor is registered with the Workplace Visitor Management application, the visitor details are also sent to the Safe Workplace application so that other visitor-related actions can be performed. • Type: true/false • Default value: **true** • Location: System Property [sys_properties] table
sn_wsd_visitor.default_badge_template	This property specifies the sys_id of the badge template that is used if no badge is found in the location hierarchy of the visitor registration. The default value is the sys_id of the *`Visitor Badge (Black and White)`* template.

Kiosk Check-in Flow Configuration form

Use the Kiosk Check-in Flow Configuration form to create a check-in flow for the Workplace Services Kiosk.

Kiosk Check-in Flow Configuration form

Field	Description
Name	Name of the check-in flow configuration.

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Kiosk Check-in Flow Configuration form (continued)

Field	Description
Authentication page configuration	Page configuration that contains the check-in authentication.
Self-registration page configuration	Page configuration that contains the self-registration flow.
Acknowledgment page configuration	Page configuration that contains the check-in policies for the visitor to acknowledge. For more information about policies, see Create a visitor policy.
Picture page configuration	Page configuration that uses the camera to take a picture of the visitor.
Summary page configuration	Page configuration that contains the summary of the visit.
End page configuration	Page configuration that displays the next steps for the visitor to follow.
Active	Option to make the page configuration active.

Note: The Acknowledgment, Summary, Picture, and Self-registration pages are optional. If an optional page is not configured, it is skipped in the check-in flow.

Check-in flows based on self-registration

Scenario	Flow
Authentication is successful	**Authentication page** > **Summary page** > **Picture Page** > **Acknowledgement page** > **End page** > **Kiosk home page**
Authentication fails and self-registration is not configured	**Authentication page** > **Authentication error** > **Kiosk home page**
Authentication fails, self-registration is configured, and the visitor opts out of self-registration	**Authentication page** > **Authentication error** > **Self-registration page** > **Kiosk home page**
Authentication fails, self-registration is configured, and the visitor opts to self-register	**Authentication page** > **Authentication error** > **Self-registration page** > **Picture Page** > **Acknowledgement page** > **End page** > **Kiosk home page**

Kiosk Check-out Flow Configuration form

Use the Kiosk Check-out Flow Configuration form to create a check-out flow for the Workplace Services Kiosk.

Kiosk Check-out Flow Configuration form

Field	Description
Name	Name of the check-out flow configuration.

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Kiosk Check-out Flow Configuration form (continued)

Field	Description
Authentication page configuration	Page configuration that contains the check-out authentication. If the authentication is successful, the kiosk displays the summary page. If the summary page is not configured, the kiosk displays the end page.
Summary page configuration	Page configuration that contains the check-out summary. The summary page configuration is optional. If the visitor selects **Continue**, the kiosk displays the end page.
End page configuration	Page configuration that contains the check-out confirmation. If the visitor selects **Done**, or if the page is idle for thirty seconds, the kiosk displays the authentication page.
Active	Option to make the page configuration active.

Kiosk Page Configuration form

Use the Kiosk Page Configuration form to create pages for the Workplace Services Kiosk.

Kiosk Page Configuration form

Field	Description
Name	Name of the page configuration.
Title	Title that is displayed when the page is displayed on a kiosk.
Page type	Type of page that you want to create for the kiosk flow. For more information, see Kiosk Check-in Flow Configuration form.
Subtitle	Subtitle that is displayed when the page is displayed on a kiosk.
Application	Application scope of the page configuration record. This field is automatically filled based on the application scope of your instance.
Optional step	Option to allow kiosk users to skip taking a picture. This field appears only if the page type is **Picture**.
Always display policies	Option to always display the policies page, even if the visitor has accepted the policies earlier.

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Kiosk Page Configuration form (continued)

Field	Description
Record producer	Record producer that contains the self-registration logic. This field appears only if the page type is **Self-registration**. You can use the default **WSD VM Self registration** record producer that is included with the Workplace Visitor Management application.
Primary authentication option	Authentication option that opens by default on the authentication page. This field appears only if the page type is **Authentication**. **Note:** If the **Primary authentication option** field is not visible on the form, you must add it to the form layout. For more information about form layouts, see Configuring the form layout.

Self-registration record producer configuration

As an admin, you can configure the default record producer by navigating to **All** > **Workplace Visitor Management** > **Administration** > **Record Producers**, then selecting the **WSD VM Self registration** record producer.

The Variables related list contains the variables that are included with the record producer. The following variables are not displayed on the kiosk:

- *Location*: The location of the kiosk device determines the company policies and the list of hosts for the kiosk device.

  The location value is automatically filled at run time based on the kiosk configuration. For more information, see Create a kiosk configuration.

- *Duration*: The duration of the visit is used to determine the expected departure time of the visitor.

  The default value of the duration is **1h**, which specifies one hour. You can enter a combination of numbers with `h` to specify hours or `m` to specify minutes. For example, `5h` is five hours, `30m` is thirty minutes, `1h30m` is one hour and thirty minutes.

Kiosk Page Customizations

The Page Configurations created for the Workplace Services Kiosk can be further customized by using their related lists.

Authentication Page

After creating an authentication page configuration, you can add the authentication options to the page. To add an authentication option from the Visitor authentication options list, select **New**, then fill in the Visitor authentication option form.

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Visitor authentication option form

Field	Description
Authentication option	Option used for visitor authentication. For more information, see the following Authentication options table.
Page configuration	Authentication page configuration that the option is linked to.

Authentication options

Authentication option	Description
Check-in with Qr-code	Visitor must scan the invitation QR code for authentication. The QR code is in the email invite that is sent to the visitor. **Note:** Ensure that the kiosk operator provides camera permissions on the kiosk to scan the QR code. For more information, see Setting up a kiosk device.
Check-out with Qr-code	Visitor must scan the invitation QR code for authentication. The QR code is in the email invite that is sent to the visitor. **Note:** Ensure that the kiosk operator provides camera permissions on the kiosk to scan the QR code. For more information, see Setting up a kiosk device.
Check-in with email address	Visitor must use their email address for authentication.
Check-out with email address	Visitor must use their email address for authentication.
Check-in with invitation passcode	Visitor must use the invitation pass code for authentication. The pass code is in the email invite that is sent to the visitor.
Check-out with invitation passcode	Visitor must use the invitation pass code for authentication. The pass code is in the email invite that is sent to the visitor.
Check-in with phone number	Visitor must use their phone number for authentication.
Check-out with phone number	Visitor must use their phone number for authentication.
Check-in with your name	Visitor must use their full name for authentication.

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Authentication options (continued)

Authentication option	Description
Check-out with your name	Visitor must use their full name for authentication.

End Page

After creating an end page configuration, you can add further steps for the visitor. To add a step from the Kiosk Next Steps list, select **New**, then fill in the Kiosk Next Step form.

Kiosk Next Step form

Field	Description
Name	Name of the next step record.
Title	Title of the step on the kiosk end page.
Subtitle	Subtitle of the step on the kiosk end page.
Order	Order of the step. Steps with a higher order are displayed later in the page.
Page	End page that the record is linked to.
Active	Option to make the record active.

Location Policy form

Use the location policy form to assign a visitor policy to a workplace location, apply the policy to internal/external visitors and configure whether the policies require signatures.

Location Policy form

Field	Description
Location	Workplace location to which the visitor policy it linked.
Policy	Visitor policy that is linked being linked to the workplace location.
Active	Option to activate the record.
Required for internal	Option to enable the policy for internal visitors.
Require signature for internal	Option to enable signatures for internal visitors to acknowledge the policy. The visitor signature is stored in the visitor policy confirmation record.
Required for external	Option to enable the policy for external visitors.
Require signature for external	Option to enable signatures for external visitors to acknowledge the policy. The visitor signature is stored in the visitor policy confirmation record.

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New visit form

Use the New visit form to select a purpose, location, date and time for your visit. Additionally, add visitors and optional co-hosts

New visit form

Field	Description
Visit description	Description with details about the purpose of the visit.
Location	Location of the visit.
Host	Name of the host of the visitor. By default, the field is set to your name.
Co-hosts	Co-hosts for the visit. Co-hosts have the visit displayed on their host portal and can edit the visit or manage visitors.
From	Start date and time for the visit.
To	End time and date for the visit.
All-day invitation	Option for visits that last for an entire day.

Recurring invitation	Option to make a recurring invitation for the visitor.
	
	For recurring invitations, you can configure the following fields:
	• Repeat: Frequency of the recurring invitation. It can be **Daily**, **Weekly**, or **Monthly**.
	• Lasts: How long the recurring invitation lasts. You can the following values.
	  ○ For: Specifies how long the invitation lasts based on the **Number of days** field.
	  ○ Until: Specifies when the invitation expires based on the **Ends on this date** field.
	• Select days of the week: Days the visitors will arrive on. This field is only applicable for the **Weekly** repeat.

Private note to receptionist	Additional requirements or a private note to the receptionist.

Additional requirement form

The Additional requirement form specifies visitor information that is required while adding a visitor.

Additional requirement form

Field	Description
Name	Name of the additional requirement.

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Additional requirement form (continued)

Field	Description
Visit requirements	Visit requirement record linked to the additional requirement record.
Order	Order of the additional requirement on the portal pages.
Filled by	Person who fills the required information. You can select the host, guest, or both.
Help text	Informational text for the information field.
Label	Label text that is displayed on the portal pages.
Requirement type	Type of the requirement, which determines the section that the information field is displayed in. You can select any one of the following options: • Additional information: Information like diet restrictions or license plate number; displayed in the first section of the pre-check tasks. • Document to upload: Documents like a visitor ID or photograph; displayed in the second section of the pre-check tasks. • Document to acknowledge: Policy documents or guidelines; displayed in the third section of the pre-check tasks.
Active	Option to set the record to active. Inactive records are not displayed on the portal pages.
Mandatory for	Person who is required to fill the information. You can select the host, guest, both, or none. If you select **None**, the field is considered optional.

Analytics and Reporting Solutions for Workplace Visitor Management

Monitor the status of visitor registrations made in your organization.

View visit logs

View the visit logs which display all the state changes of a visitor registration.

Before you begin
Role required: sn_wsd_visitor.admin

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About this task

You can view all the status changes of a visitor registration at any point. You can also make status updates from here.

Procedure

1. Navigate to **All** > **Workplace Visitor Management** > **Administration** > **Visit Logs**.
2. Search for the visitor registration which you want to view.
3. **Optional:** View the current and previous states by selecting the info icon ( ) next to the visit log.
   For more information about each state, see Visitor registration states.

Visitor Reception Dashboard

With the Visitor Reception Dashboard, you can track visitor registrations created in the application on any day. Track the statuses of visitors who are on the premises. View the number of visitors who are expected, have checked in, have checked out, are on break, or have not showed up.

Note: The Workplace Visitor Management dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central. Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

For more information about the migrated dashboard, see Reservation Management dashboard.

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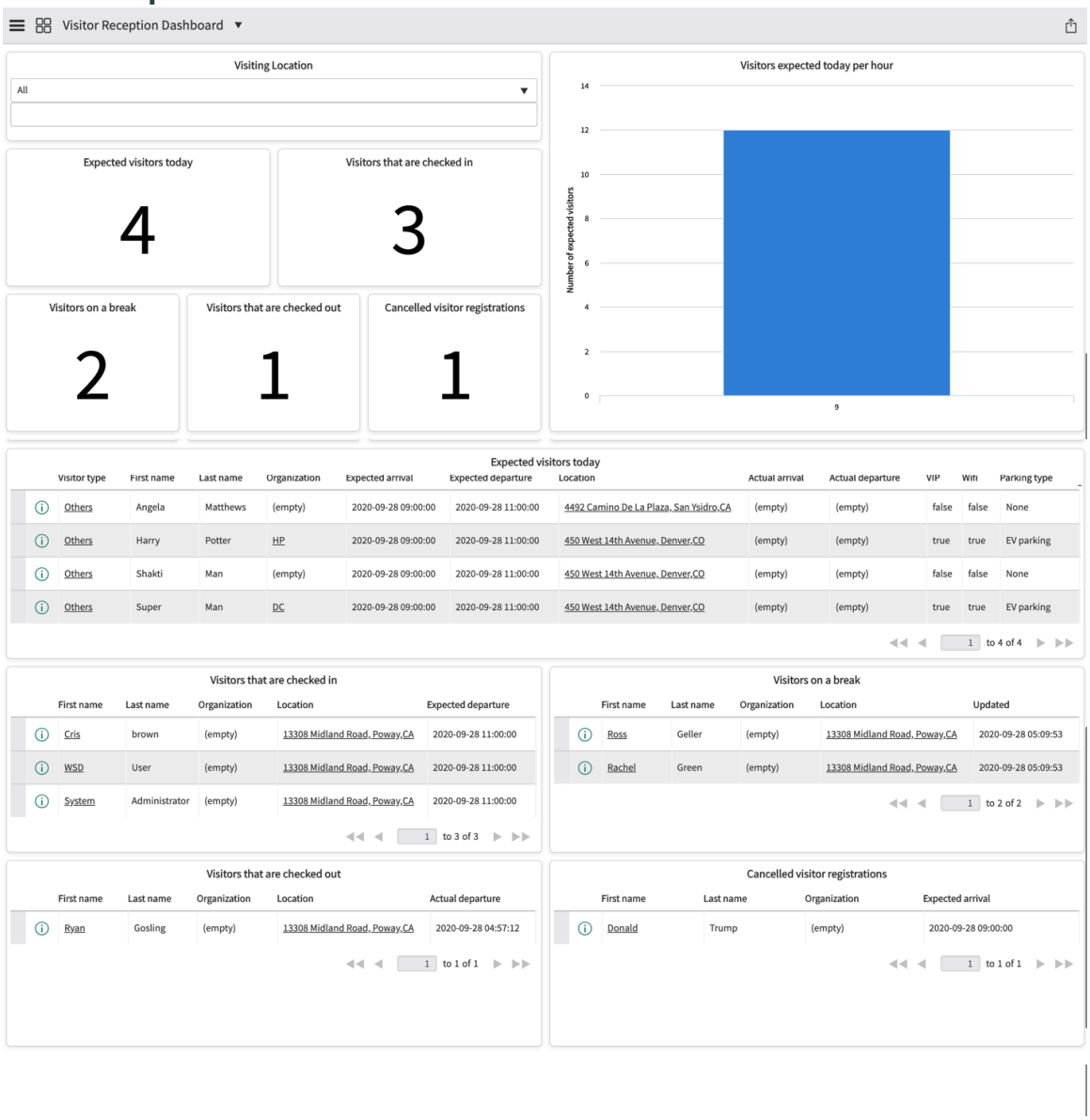
Visitor Reception Dashboard



To access the Visitor Reception Dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards** .

Select a location in the **Visiting Location** field at the top to display reports for that location in separate tabs.

End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace Visitor Management manager: Needs visibility into the real-time status and the number of the visitor registrations created.	sn_wsd_visitor.manager	• Review current day's visitor registrations • Monitor visitor registrations created by employees. • Monitor visitors who are currently checked in and

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End user and roles (continued)

End user and goal	Required role	Benefits
		the visitors who have checked out. • Monitor visitors who are on break. • Monitor expected visitors on the current day and at any hour. • Check cancelled registrations. • Check visitor's who did not show up.

Data visualizations

The Visitor reception dashboard allows you to view the following visualizations.

Data visualizations

Title	Type	Description
Expected visitors today	Single score	Number of expected visitors on the current day.
Visitors that are checked in	Single score	Number of visitors who are currently checked.
Visitors on break	Single score	Number of visitors who are currently on break.
Visitors that are checked out	Single score	Number of visitors who have checked out on the current day.
Cancelled visitor registrations	Single score	Number of cancelled visitor registrations.
Visitors expected today per hour	Column	Number of visitors expected at any hour on the current day. It shows the trend of the day according to when visitors are expected.
Expected visitors today	List	Visitor registrations of the expected visitors on the current day.
Visitors that are checked in	List	Visitor registrations of the visitors who are currently checked in.
Visitors on break	List	Visitor registrations of the visitors who are currently on break.

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Data visualizations (continued)

Title	Type	Description
Visitors that are checked out	List	Visitor registrations of the visitors who have checked out.
Cancelled visitor registrations	List	Cancelled visitor registrations.

Workplace Calendar Synchronization

Enhance your workplace's reservation experience by synchronizing your reservations with your calendar provider by using the ServiceNow® Workplace Calendar Synchronization application. Enable your employees to make reservations with ServiceNow® Workplace Reservation Management or with your organization's calendar service providers, such as Microsoft Exchange Online.

Get started

Explore Learn about Workplace Calendar Synchronization concepts and features.	**Configure** Install the Workplace Calendar Synchronization application.	**Synchronize** Synchronize reservations between Workplace Reservation Management
Manage Manage reservation synchronizations, view the synchronization deltas. Know about sync conditions and troubleshooting.	**Analytics and Reporting Solutions** Coordinate work and improve processes with the synchronization dashboard.	**Reference** Get details about components like roles, tables, properties, scheduled jobs and flows.

Explore Workplace Calendar Synchronization

Enhance your workplace reservation experience. Synchronize your reservations with your calendar provider by using the ServiceNow® Workplace Calendar Synchronization application. Enable your employees to make reservations with ServiceNow® Workplace Reservation Management or with your organization's calendar service providers, such as Microsoft Exchange Online.

The Workplace Calendar Synchronization application synchronizes reservation-related information based on the configuration made on the requested workplace room. When you synchronize with a calendar provider, the reservations are directly added to the calendars of your employees.

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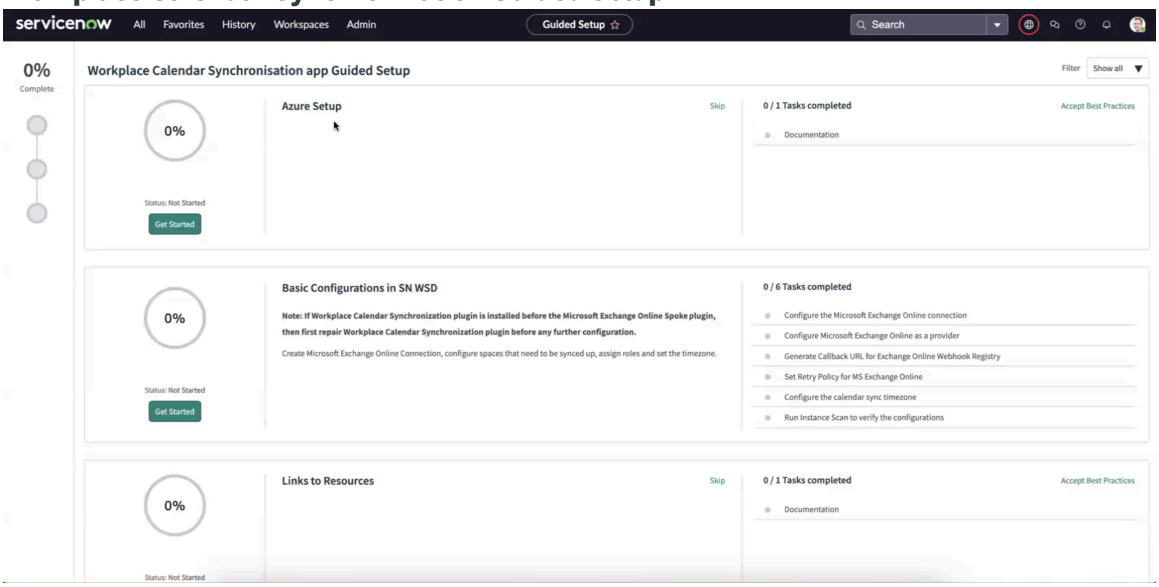
Note: Workplace Calendar Synchronization Guided setup is available for system administrators and is provided out of the box with the application. The Guided setup can be accessed from **All** > **Workplace Calendar Synchronization** > **Administration** > **Guided setup**.

Workplace Calendar Synchronization Guided Setup



The Workplace Calendar Synchronization application supports the following calendar services:

- Microsoft Exchange Online
- Google Calendar
- Microsoft Exchange On - Premises

Note: Workplace Calendar Synchronization does not support hybrid Microsoft Exchange environments.

The Workplace Calendar Synchronization application uses the calendar service as the primary source. However, the availability for a workplace room can be checked either using the calendar provider or the Reservation portal separately. Events are sent and received from the calendar provider for updates. The calendar provider confirms reservations on rooms created using the Workplace Reservation Management Reservation portal.

Specify your connection and synchronization settings

As an admin, you can do the following:

- Configure connections with a calendar service.
- Configure workplace items that require synchronization when they’re reserved.
- Monitor events and calendar events that are created in the applications. For information about how events work, refer to Events in Workplace Calendar Synchronization.
- For Google Calendar and Microsoft Exchange, receive calendar updates via synchronization deltas (Sync deltas). A Sync delta contains a token using which the application retrieves only the changes that happened since the last interval instead of displaying the complete calendar history of the workplace item.

Note: If you’re using Microsoft Exchange Online, you cannot view synchronization deltas.

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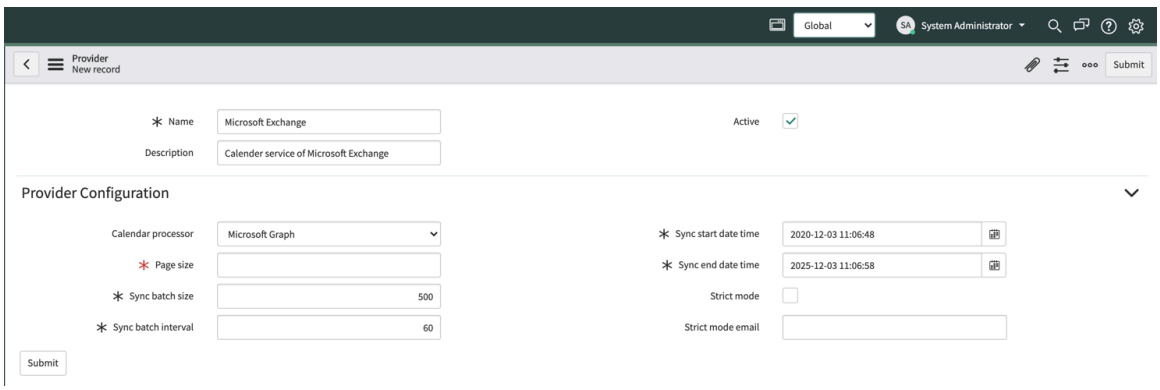
- For Microsoft Exchange Online, receive calendar updates through subscriptions and callback events. A callback event triggers the application to retrieve the calendar information.
- For Google Calendar and Microsoft Exchange On Premises, receive calendar updates via synchronization deltas (Sync deltas). A Sync delta contains a token using which the application retrieves only the changes that happened since the last interval instead of displaying the complete calendar history of the workplace item.

You can create a connection with your calendar service by using the following configuration form:



Create or update reservations

As an employee, you can do the following:

- Make a reservation for a workplace item in both the Workplace Reservation Management application and synchronize it with your calendar service.
- Update a reservation or cancel a reservation using the calendar provider or the Workplace Reservation Management application. View the reservation details, add attendees, change location or more.

> **Warning:** Reservations that are created using calendar providers cannot be edited in the Workplace Reservation Management application

- Check the availability of workplace items using both Workplace Reservation Management and your calendar service.
- Using the calendar provider, plan meetings, add a location, invite attendees and more. The meeting is synchronized to Workplace Reservation Management as a reservation.
- See all your workplace reservations in a single place.

> **Note:** Only rooms added in the Rooms [sn_wsd_core_room] table are synchronized using the calendar provider. To synchronize spaces, that spaces must be added as rooms in the Rooms [sn_wsd_core_room] table.

Synchronized information

When you synchronize your calendar provider and Workplace Reservation Management, whenever a reservation is created or updated, the following information is synchronized:

- Details of the reserved location
- Subject of the reservation
- Start and end times of the reservation
- Privacy of the reservation
- Invitees of the reservation

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Configure Workplace Calendar Synchronization

Install and configure the Workplace Calendar Synchronization application to create personalized calendars across supported platforms, such as Microsoft Exchange Online, Google Calendar, or Microsoft Exchange On-Premises.

Configuration overview

This section provides a guided overview of all foundational setup tasks, from installing the application and configuring authentication credentials, to creating calendar providers and linking reservable spaces. Use the step-by-step links below to quickly access and configure essential features, ensuring your calendar sync processes are streamlined and ready for use.



Connections

Calendar sync uses two types of connections that must both be configured correctly:

- System-to-System — backend integrations that sync calendar data automatically between ServiceNow and the external calendar provider.
- User-level — connections established per user performing actions in the application. Configuration requirements vary by integration mode.

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Synchronization Mode

Before starting configuration, select the synchronization mode that suits your organization's security and access requirements. Your mode choice determines how credentials are configured, which grant type is required, and whether a delegated user email is needed.

Synchronization mode

Mode	Description
Normal	Syncs calendar events using each authenticated user's credentials. Suited for most organizations. No delegated user email required.
Strict	Routes all sync operations through a single shared service account (delegated user). Suited for high-security environments.
Personal	Each user individually authorizes access to their own calendar via an interface pop-up the first time they interact with the application.

1. Install Workplace Calendar Synchronization

   Install the Workplace Calendar Synchronization application from the ServiceNow Store.

2. Register ServiceNow as an OAuth Provider

   Register ServiceNow as an OAuth provider in your external calendar service such as Microsoft Azure Active Directory or Google Cloud Console to authorize the connection between ServiceNow and the calendar provider. This step generates the Client ID and Client Secret you will need when configuring the Application Registry.

3. Configure the Application Registry

   Configure the OAuth application registry records in ServiceNow using the credentials obtained during provider registration. These records establish the OAuth connection between ServiceNow and the external calendar provider.

4. Configure the Connection and Credential Alias

   The Connection and Credential Alias securely stores the OAuth credentials that ServiceNow uses to authenticate with the external calendar provider. Configuration involves two parts: the system-to-system connection (required for all modes) and the user-level connection (additional steps for Personal mode only).

5. Create and Configure a Calendar Provider

   Create a Calendar Provider record in Workplace Calendar Synchronization to define the external calendar service, sync start and end times, synchronization mode, and associated connection settings.

6. Connect Reservable Spaces to the Calendar Provider

   Create Reservable Sync Configuration records to link each ServiceNow room or space record to its corresponding resource mailbox or calendar entry in the external calendar provider. Each space that participates in calendar sync requires its own configuration record.

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Install Workplace Calendar Synchronization

Install the Workplace Calendar Synchronization application from ServiceNow Store applications. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions:Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.

Use the following details when required:

- Name of the application: Workplace Calendar Synchronization
- ID of the application: sn_wsd_rsvsync

Role required: admin

About this task

The following plugins are activated when you install Workplace Calendar Synchronization:

- Workplace Core (sn_wsd_core) minimum version 2.3.3
- Workplace Reservation Management (sn_wsd_rsv) minimum version 1.3.3
- Microsoft Exchange Online
- Depending on the calendar provider that you want to configure, instal the following plugins:
  - Microsoft Exchange Server Spoke
  - Google Calendar spoke.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Calendar Synchronization) or ID (sn_wsd_rsvsync). If you cannot find the application, you may have to request it from the ServiceNow Store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Calendar Synchronization.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

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Setup Workplace Calendar Synchronization

As an admin, create connections with your calendar providers and synchronize reservations.

Perform the following actions to synchronize reservations using the Workplace Calendar Synchronization:

- Authenticate ServiceNow with your calendar provider.
- Set up an OAuth connectivity with your calendar provider: Create an application registry and generate OAuth entities.
- Configure connection & credential aliases: Specify the connection type, OAuth entity profile and type of credentials.
- Configure calendar providers: Select the calendar processor and specify how and when to perform synchronization.
- For Microsoft Exchange On-Premises and Google Calendar, activate the **WSDRS Sync Calendar items** scheduled job.

For more information about scheduled jobs and flows, refer to Scheduled jobs installed with Workplace Calendar Synchronization and Flows installed with Workplace Calendar Synchronization.

Important: You will not be notified when an event is rejected or declined by Microsoft Outlook. For the same reason, a scheduled job - **Clean-up Awaiting/Rejected Reservations**, is available that you can run on any suitable frequency to clear the reservations rejected or declined by the Microsoft Outlook calendar.

Warning: Reservations that are created using calendar providers can't be edited in the Workplace Reservation Management application.

Workplace Calendar Synchronization version 1.6.1 and older

If you are using Workplace Calendar Synchronization version 1.6.1 and older, to set up a connection with Microsoft Exchange Online, refer to Microsoft Exchange Online - Calendar synchronization.

Workplace Calendar Synchronization version 2.0.1 and later

From Workplace Calendar Synchronization 2.0.1 and later, the application uses Microsoft Exchange Online spoke. It's required to install Microsoft Exchange Online spoke version 3.2.1, otherwise, the application doesn't work.

Workplace Calendar Synchronization 2.0.1 and later uses Integration Hub the REST API to connect with Microsoft Exchange Online spoke.

Set Workplace Calendar Synchronization properties

Configure the properties for the Workplace Calendar Synchronization to set the Exchange Online Sync Integration Mode to Strict, Personal Authentication, or Normal mode to synchronize reservations.

Before you begin
Role required: sn_wsd_rsvsync.admin

Note: The Exchange Online Sync Integration Mode property isn't supported for Google Calendar.

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Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Properties**.
2. Set the Exchange Online Sync Integration Mode property value to any of the following:

Exchange Online Sync Integration Modes

Mode	Description
Strict	To use strict mode user to manage all reservations in Outlook using an authorization code, set up Strict mode authentication to connect Microsoft Exchange Online with Workplace Calendar Synchronization.
Personal	To manage a user's own reservations in Outlook using their personal token, configure the connections and settings with Microsoft Exchange Online in Personal Authentication mode. This process ensures synchronization of reservations and restricts unauthorized access to the user's calendar. **Note:** This property isn't supported for Google Calendar and Microsoft Exchange On-Premises.
Normal	To manage all reservations in Outlook using admin client credentials, set up a Normal mode authentication to connect Microsoft Exchange Online with Workplace Calendar Synchronization.

3. Select **Save**.

Microsoft Exchange Online - Calendar synchronization

Synchronize reservations between Microsoft Exchange Online and Workplace Reservation Management.

The Workplace Calendar Synchronization application provides a medium to establish a connection between your Microsoft Exchange Online Outlook calendar and the Workplace Reservation Management application. You can synchronize reservations made in the Reservation portal to the Microsoft Outlook calendar and block the date and time. Similarly, you can also synchronize the events made in the Microsoft Outlook calendar with the Workplace Reservation Management application and track the reservations and its details.

Microsoft Graph API

The Microsoft Graph API provides access to data stored across Microsoft 365 services. So, to synchronize reservations, the Microsoft Graph connection plays a crucial role. When you install Microsoft Exchange Online Spoke, the following credentials are installed:

- **MS Graph 1**
- **MS Graph 2**

To install the Microsoft Exchange Online Spoke, refer to Create a connection with Microsoft Exchange Online spoke.

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Subscriptions

When you activate a reservable sync configuration to synchronize reservations with Microsoft Exchange Online, a subscription is created automatically. The application notifies if a subscription renewal fails. The notification is sent to the users with the Workplace Calendar Synchronization admin [sn_wsd_rsvsync.admin] role. Subscriptions are created only for active reservable sync configurations. A subscription notifies you about the changes to events on the room mailbox. For more information about subscriptions, refer to https://learn.microsoft.com/en-us/graph/api/subscription-post-subscriptions?view=graph-rest-1.0&tabs=http.

A webhook registry contains the subscription-related details to perform a call-back. To configure a webhook registry, refer to Configure the webhook registry of Microsoft Exchange Online spoke.

Synchronization from Workplace Service Delivery to Microsoft Exchange Online

To synchronize reservations made using the Workplace Reservation Management application to the Microsoft Exchange Online Microsoft Outlook calendar, you must first create a connection with Microsoft Exchange Online. Depending on how you want to establish the connections, refer to the respective topics:

Note: By default, Microsoft Exchange Online Spoke provides you with the MS Graph 1 and MS Graph two credentials. If you do not want to use the default connection and credential alias provided by the application, you can create your own alias.

- To configure a normal mode connection with Microsoft Exchange Online, refer to Create a normal mode connection with Microsoft Exchange Online.
- To configure a strict mode connection with Microsoft Exchange Online, refer to Create a strict mode connection with Microsoft Exchange Online.

Synchronization from Microsoft Exchange Online to Workplace Reservation Management

The process of synchronizing reservations made in an Microsoft Outlook calendar to the Workplace Reservation Management is performed with the help of subscriptions. A subscription is created in the calendar provider for the room (reservable sync record). The application is notified by the subscription whenever an action is performed on the room. For more information about subscriptions, refer to https://learn.microsoft.com/en-us/graph/api/subscription-post-subscriptions?view=graph-rest-1.0&tabs=http.

Strict mode

The Workplace Calendar Synchronization application enables you to configure your connections and configurations with Microsoft Exchange Online in strict mode as well. In strict mode, events are not directly created in an employee's calendar, instead, they are sent to a general email address. Employees are invited to the event. You can specify a strict mode email id through which you want to sync reservations. Employees can only make changes using the Workplace Reservation Management application.

To configure strict mode, enable the **Strict mode** option while configuring the Microsoft Exchange Online as calendar provider. The requesters are considered as invitees.

Personal authentication mode

The Workplace Calendar Synchronization application enables you to configure your connections and configurations with Microsoft Exchange Online in personal authentication mode to synchronize reservations and to restrict unauthorized access to resource calendars. In personal

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authentication mode, a user level authentication token is generated that enables the user to create, update, or cancel reservation to synchronize events on user outlook calendar. You need to specify a strict mode email id through which you want to sync reservations. Employees can only make changes in the Workplace Reservation Management application using the generated token.

To configure personal authentication mode, enable the Personal mode option while configuring the Microsoft Exchange Online as calendar provider.

Sync past reservations

The Workplace Calendar Synchronization application enables you to sync reservations that were made in the past. You can specify the duration in date and time to get those past reservations to sync with Microsoft Exchange Online or Workplace Reservation Management. You can configure the setting using the **Synchronize past reservations**. Specify the **Sync start date time** manually from the subscription record of the reservable sync record for which you are synchronizing the past reservations. In the **Sync end date time**, you can specify the end time as you want.

Multi-provider setup

The Workplace Calendar Synchronization enables you to configure a multi-provider setup with Microsoft Exchange Online. That is, configure multiple connections and credentials with Microsoft Exchange Online. For more information on how to set up a multiprovider, refer to Create single or multiple calendar providers with Microsoft Exchange Online.

Important: Multi-provider is not supported or is not the same as Exchange hybrid configurations.

'No request' handling

No request is a mechanism to validate the generated syntax of a payload of an event created for the calendar. But, instead of sending the event to the calendar provider, it is only created. The admin can validate the payload content of the event (JSON) to ensure that is generated as expected. 'No request' ensures that the application does not make any API calls to the calendar provider when you create, update, or cancel a reservation in the Workplace Reservation Management application.

Run instance scan

Execute an Instance scan on your Workplace Calendar Synchronization configurations with Microsoft Exchange Online. The Instance Scan application diagnoses the configurations with the calendar provider by running a series of checks using suites.

Refer to Run Instance scan to check Microsoft Exchange Online synchronization configuration.

Create a normal mode connection with Microsoft Exchange Online

Perform the following steps to establish a normal mode connection with Microsoft Exchange Online.

Configure Microsoft Azure in normal mode

Set up a normal mode authentication with Microsoft Azure to connect Microsoft Exchange Online with Workplace Calendar Synchronization.

Before you begin
Role required: Exchange administrator

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About this task

Add normal mode permissions so that you can synchronize Workplace Calendar Synchronization with Microsoft Exchange Online via GraphAPI.

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. **Optional:** If you do not have an app registration, select **New registration**.
   a. On the form, enter the **Name** of the registration.
   b. Select the **Supported account types** of your choice.
   c. **Optional:** Specify the **Redirect URL**.
      Specify the following details:
      i. Select the platform as **Web**.
      ii. Enter the URL in the following format: https://<instance-Name>.service-now.com/oauth_redirect.do
4. If you already have an app registration, select the app registration.
   a. Navigate to **Manage** > **Authentication**.
   b. Navigate to **Add a platform** > **Web applications** > **Web**.
   c. On the Configure Web form, fill the fields.

Configure web form

Field	Description
Redirect URL	Enter a URL in the format: https://[instance].service-now.com/oauth_redirect.do
Implicit grant	Check **Access tokens**, and **ID tokens**

   d. Select **Configure**.
5. Add a client secret.
   a. Navigate to **Manage** > **Certificates and secrets**.
   b. In the **Description** field, enter a short description about the secret.
   c. Under **Expires**, select an expiry.
   d. Select **Add**.
   e. After adding, in the Client secrets section, copy the value by selecting **Copy to clipboard**.
6. Add a permission.
   a. Navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.

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c. Select **Microsoft Graph**.

d. Select **Application permissions**.

e. Under **Calendars**, select **Calendars.ReadWrite**.

f. Select **Add permissions**.

g. On the Configured permissions screen, select **Grant admin consent for ServiceNow**.

Result
The Microsoft Exchange Online is set up with Microsoft Azure.

What to do next
Configure resources Microsoft Exchange Online in the calendar. For more information, refer to https://learn.microsoft.com/en-us/exchange/recipients-in-exchange-online/manage-resource-mailboxes.

Create a connection with Microsoft Exchange Online spoke

Connect to the Microsoft Exchange Online spoke by creating a connection.

Before you begin
Ensure the following:

1. Install Microsoft Exchange Online spoke from the ServiceNow Store. For more information, refer to Microsoft Exchange Online spoke.

   Important: After installing Microsoft Exchange Online spoke, check that the **Data Stream action** field of the Data source **Exchange Online Calendar** is not set to empty. Otherwise, repair the Microsoft Exchange Online spoke plugin.

2. After installing Microsoft Exchange Online spoke, depending on what type of customer you are, perform the following actions:
   - If you are a new customer, to install the applications, refer to Install Workplace Calendar Synchronization.
   - If you are an existing customer, upgrade to the latest versions of the following applications:
     - Workplace Reservation Management
     - Workplace Calendar Synchronization
3. Repair the Microsoft Exchange Online spoke. Perform the following repair if you never had an internal dependency on the *com.glide.hub.action_type.datastream* plugin.

   a. Navigate to **All** > **System Definition** > **Plugins**.

   b. Search and select Microsoft Exchange Online Spoke.

   c. **Repair** the plugin.

Role required: admin

About this task
Synchronize reservations using a connection with the Microsoft Exchange Online spoke.

Procedure
1. Ensure that the Microsoft Exchange Online spoke is installed.
   Refer to the **Before you begin** section.
2. Set up Microsoft Exchange Online spoke.

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If you are a new customer, in the **Create Connection records for the Microsoft Exchange Online spoke** procedure, perform the following actions:

- For **Microsoft_Exchange_Online** Connection and Credential alias, in the Connection related list, select **MS Graph 1** and make the changes.

  Do not change the **Name** and **Credential**. In the OAuth Entity Profile form of the **MS Graph 1** credential, ensure that the **Grant type** field is selected as **Client Credentials**.

- For **Microsoft_Exchange_Online_clientCred** Connection and Credential alias, in the Connection related list, select **MS Graph 2** and make the changes.

  Do not change the **Name** and **Credential**. In the OAuth Entity Profile form of the **MS Graph 2** credential, ensure that the **Grant type** field is selected as **Client Credentials**.

What to do next

Set up OAuth connection with Microsoft Exchange Online

Set up OAuth connection with Microsoft Exchange Online

Register your Microsoft Exchange Online with ServiceNow instance for OAuth authorization.

Before you begin

Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Ensure that you performed the following steps:

- Configure Microsoft Azure in normal mode
- Configured resources Microsoft Exchange Online in the calendar. For more information, refer to https://learn.microsoft.com/en-us/exchange/recipients-in-exchange-online/manage-resource-mailboxes .
- Create a connection with Microsoft Exchange Online spoke

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **Microsoft Exchange Online_clientCredentials**
3. On the form, fill in the fields with the specified details.

Third-party OAuth Provider form

Field	Description
Name	Unique name to identify the record, for example, Microsoft Exchange for Sync.
Client ID	Client ID created during the app authentication in Microsoft Azure.

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Field	Description
Client Secret	The password you generated when creating the app in Microsoft Azure.
Default Grant Type	Grant type used to establish the token. Select **Client Credentials**.
Authorization URL	OAuth authorization code endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/authorize`.
Token URL	OAuth server token endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/token`.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

4. Right-click in the form header and select **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, `Microsoft Exchange Online default_profile`.

Result
The OAuth registration is added for Microsoft Exchange Online.

What to do next
Depending on whether you want to use the default alias or you want to create your own alias, do one of the following:

- To use default alias: Configure Connection and credential alias for Microsoft Exchange Online using the default credentials and connections.
- To create your own alias: Create your own connection and credential alias for Microsoft Exchange Online.

Configure Connection and credential alias for Microsoft Exchange Online using the default credentials and connections

Establish connection and credential alias for Microsoft Exchange Online so that you can synchronize reservations. Configure the default credentials and connections. Ensure that the values for the connection and credentials alias are set as specified.

Before you begin

- Configure Microsoft Azure in normal mode
- Set up OAuth connection with Microsoft Exchange Online.

Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.

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3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Note: Starting from Workplace Calendar Synchronization version 2.0.1, to synchronize the reservations automatically with Microsoft Exchange Online, create a connection with Microsoft Exchange Online spoke version 3.2.1. If you have upgraded to Workplace Calendar Synchronization version 2.0.1, then the following procedure is no longer required. For more information on how to install Microsoft Exchange Online spoke and to set up a connection, refer to Create a connection with Microsoft Exchange Online spoke.

Role required: admin

Procedure

1. Navigate to **All** > **Connection & Credentials** > **Credentials**.
   Perform the following actions individually:

   a. Select **MS Graph 1**.
   On the form, check if the **OAuth Entity Profile** is set as **Microsoft Exchange Online_clientCredentials default_profile**. If it is not set, then set the profile as specified.

   b. Go back to the **Credentials** list.

   c. Select **MS Graph 2**.
   On the form, check if the **OAuth Entity Profile** is set as **Microsoft Exchange Online_clientCredentials default_profile**. If it is not set, then set the profile as specified.

2. Navigate to **All** > **Connection & Credentials** > **Connections**.
   Perform the following actions individually:

   a. Select **MS Graph 1**.
   Check if the fields are set as follows:
   - **Connection alias**: **sn_ex_online_spke.Microsoft_Exchange_Online**
   - **Credential**: **MS Graph 1**
   - **Connection URL**: https://graph.microsoft.com

   b. Go back to the **Connections** list.

   c. Select **MS Graph 2**.
   Check if the fields are set as follows:
   - **Connection alias**: **sn_ex_online_spke.Microsoft_Exchange_Online_clientCred**
   - **Credential**: **MS Graph 2**
   - **Connection URL**: https://graph.microsoft.com

Result

The Connection and credential alias is set.

- Configure new rooms(resources) in Microsoft Exchange Online to synchronize reservations.
- After synchronization, ensure that the meeting subject is unchanged. If the meeting subject is changed, use Microsoft PowerShell to make changes.

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What to do next
Configure Microsoft Exchange Online calendar provider

Create your own connection and credential alias for Microsoft Exchange Online

Configure your own connection and credential alias for Microsoft Exchange Online if you do not want to use the default connection and credential aliases provided by the application.

Before you begin
Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon () on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Role required: admin

About this task
Create your own connection and credential alias, if you do not want to use the default alias. If you want to use the default alias, refer to Configure Connection and credential alias for Microsoft Exchange Online using the default credentials and connections.

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.
2. Select **New**.
3. On the form, fill in the fields.

Connection & Credential Aliases form

Field	Description
Name	Name for the connection and credential alias.
ID	The field is automatically generated after you save the form based on the specified **Name**.
Application	Ensure that the application is set as **Microsoft Exchange Online Spoke**
Parent alias	Select **sn_ex_online_spke.Microsoft_Exchange_Online**.

4. Select **Submit**.
   The Connection and Credential alias record is created.
5. Create an OAuth 2.0 credential to use in the newly created connection and credential alias record.
   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.
   b. Select **New**.
   c. Select **OAuth 2.0 Credentials**.

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d. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Descriptions
Name	Name of the credential. Provide a unique name to differentiate from the default credentials provided by the application.
Active	Option to activate the credential.
OAuth Entity Profile	Select the default OAuth entity profile that was generated when you performed the application registry in Set up OAuth connection with Microsoft Exchange Online.
Applies to	Specify how you want to apply to the MID servers.
Order	Order for the credential.

e. Select **Submit**.
The credential record is created.

f. Open the credential record that you created.

g. On the form, select **Get OAuth Token**.
On the Microsoft window that opens, enter your credentials.

h. Select **Update**.

6. Configure connection for the connection and credential alias.

a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.

b. Select the connection and credential record that you created in the initial steps.

c. On the form, in the Connections related list, select **New**.

d. On the form, fill in the fields.

HTTPs Connection form

Field	Description
Name	Name of the connection.
Credential	Select the credential record that you created in Step 5.
Connection alias	The field is automatically set with the connection and credential alias.

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Field	Description
Connection URL	Enter https://graph.microsoft.com

e. Select **Submit**.

Result
The connection and credential record is created with specified credentials and connections.

What to do next
To use it for the calendar provider, see Configure Microsoft Exchange Online calendar provider.

Configure Microsoft Exchange Online calendar provider

Configure Microsoft Exchange Online as a calendar provider in normal mode to synchronize reservations.

Before you begin
Important: If you do not want to use the default alias provided by the application for the calendar provider, you can create your own connection and credential alias. Refer to Create your own connection and credential alias for Microsoft Exchange Online.

Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Note: For calendars to synchronize successfully, you must have an email address that matches that of the provider.

Role required: admin

About this task
Configure Microsoft Exchange Online as calendar provider. If you want to specify your own alias, then enable the **Override alias** option. To create your own alias, refer to Create your own connection and credential alias for Microsoft Exchange Online.

Procedure
1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select **New**.
3. On the form, fill in the fields.

Provider form

Field	Description
Name	Name of the calendar provider. For example, Microsoft Exchange.
Description	Description of the calendar service.

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Field	Description
Active	Option to activate the calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Microsoft Graph** from **Provider Configuration**.
Override alias?	Option to enable selection of your own connection and credential alias from **Provider Configuration**. If the option is not enabled, then the default connection and credential alias is used.
Connection & credential alias	Select the connection and credential alias that you created on your own for the calendar provider. This option appears only if you have selected the **Override alias?** option rom **Provider Configuration**. If an alias is not specified, the default connection and credential alias is used.
Sync start date time	The start date and time of the synchronization. The sync generates information from this date. Specify the **Sync start date time** manually from the subscription record of the reservable sync record for which you are syncing the past reservations. **Important:** The past sync duration must not exceed 1825 days.
Sync end date time	End date and time of the synchronization. The sync generates information until this date. The recommended setting is at least 5 years from the **Sync start date time**. **Important:** The past sync duration must not exceed 1825 days.
Sync past reservations	Select the option to synchronize all the past reservations from the specified **Sync start date time** to the **Sync end date time**. You can configure the setting using the **Synchronize past reservations**.
Delegated user email	Delegated user email address that is used to create reservations and to receive updates on room calendars as notifications.

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Field	Description
	Note: If multiple delegated users manage multiple rooms, a separate calendar provider record must be created for each user to manage their respective rooms. This requires retrieving individual tokens for each user, creating separate connections and credential aliases, and mapping them to the respective calendar provider.

Note: The Strict mode field is deprecated and the user must set the Exchange Online Sync Integration Mode property to Strict, Personal, or Normal mode. Additionally, the strict mode email has been updated to Delegated user email.

4. Select **Submit**.

Result
The calendar provider is added.

Warning: Reservations that are created using calendar providers cannot be edited in the Workplace Reservation Management application.

What to do next
Run Instance scan to check Microsoft Exchange Online synchronization configuration. For more information, see Run Instance scan to check Microsoft Exchange Online synchronization configuration.

Create a strict mode connection with Microsoft Exchange Online

For a strict mode connection with Microsoft Exchange Online, you must perform the following actions.

Configure Microsoft Azure

Set up a strict mode authentication with Microsoft Azure to connect Microsoft Exchange Online with Workplace Calendar Synchronization.

Before you begin
As a delegated user, you must have a valid mailbox in the Microsoft Exchange Online. The user is identified by the email address. The same email address must be specified in the delegated user email address where it is necessary.

Role required: Exchange administrator

About this task
Add strict mode permissions to synchronize Workplace Calendar Synchronization with Microsoft Exchange Online via GraphAPI in strict mode.

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **Azure Active Directory** > **Manage** > **App registrations**.
3. **Optional:** If you do not have an app registration, select **New registration**.

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a. On the form, enter the **Name** of the registration.

b. Select the **Supported account types** of your choice.

c. **Optional:** Specify the **Redirect URL**.
Specify the following details:

i. Select the platform as **Web**.

ii. Enter the URL in the following format: https://<instance-Name>.service-now.com/oauth_redirect.do

4. If you already have an app registration, select the app registration.

a. Navigate to **Manage** > **Authentication**.

b. Navigate to **Add a platform** > **Web applications** > **Web**.

c. On the Configure Web form, fill the fields.

Configure web form

Field	Description
Redirect URL	Enter a URL in the format: https://[instance].service-now.com/oauth_redirect.do
Implicit grant	Check **Access tokens**, and **ID tokens**

d. Select **Configure**.

5. Add a client secret.

a. Navigate to **Manage** > **Certificates and secrets**.

b. In the **Description** field, enter a short description about the secret.

c. Under **Expires**, select an expiry.

d. Select **Add**.

e. After adding, in the Client secrets section, copy the value by selecting **Copy to clipboard**.

6. Add a permission.

a. Navigate to **Manage** > **API permissions**.

b. Select **Add a permission**.

c. Select **Microsoft Graph**.

d. Select **Delegated permissions**.

e. Under **Calendars**, select **Calendars.ReadWrite**, **Calendars.ReadWrite.Shared** and **Offline_access**.

f. Select **Add permissions**.

g. On the Configured permissions screen, select **Grant admin consent for ServiceNow**.

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What to do next
Create a strict mode configuration in Microsoft Exchange Online.

Create connection with Microsoft Exchange Online Spoke in strict mode

Configure a strict mode connection with the Microsoft Exchange Online spoke.

Before you begin
Ensure the following:

1. Install Microsoft Exchange Online spoke from the ServiceNow Store. For more information, refer to Microsoft Exchange Online spoke.

   Important: After installing Microsoft Exchange Online spoke, check that the **Data Stream action** field of the Data source **Exchange Online Calendar** is not set to empty. Otherwise, repair the Microsoft Exchange Online spoke plugin.

2. After installing Microsoft Exchange Online spoke, depending on what type of customer you are, perform the following actions:
   - If you are a new customer, to install the applications, refer to Install Workplace Calendar Synchronization.
   - If you are an existing customer, upgrade to the latest versions of the following applications:
     - Workplace Reservation Management.
     - Workplace Calendar Synchronization.
3. Repair the Microsoft Exchange Online spoke. Perform the following repair if you never had an internal dependency on the *com.glide.hub.action_type.datastream* plugin.
   a. Navigate to **All** > **System Definition** > **Plugins**.
   b. Search and select Microsoft Exchange Online Spoke.
   c. **Repair** the plugin.

Role required: admin

About this task
Synchronize reservations using a connection with the Microsoft Exchange Online spoke.

Procedure
1. Ensure that the Microsoft Exchange Online spoke is installed.
   Refer to the **Before you begin** section.
2. Set up Microsoft Exchange Online spoke.
   If you are a new customer, in the **Create Connection records for the Microsoft Exchange Online spoke** procedure, perform the following actions:
   - For **Microsoft_Exchange_Online** Connection and Credential alias, in the Connection related list, select **MS Graph 1** and make the changes.

     Do not change the **Name** and **Credential**. In the OAuth Entity Profile form of the **MS Graph 1** credential, ensure that the **Grant type** field is selected as **Client Credentials**.
   - For **Microsoft_Exchange_Online_clientCred** Connection and Credential alias, in the Connection related list, select **MS Graph 2** and make the changes.

     Do not change the **Name** and **Credential**. In the OAuth Entity Profile form of the **MS Graph 2** credential, ensure that the **Grant type** field is selected as **Client Credentials**.

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- Get OAuth token.
  a. Select the credentials (**MS Graph 1** and **MS Graph 2**) that you created previously.
  b. In the Related links section, select **Get OAuth Token**.
  c. In the Microsoft Exchange Online login page that appears, login with the strict mode user's email credentials.

What to do next
Create a strict mode configuration in Microsoft Exchange Online

Setup strict mode OAuth connectivity with Microsoft Exchange Online

Create a strict mode configuration in Microsoft Exchange Online

Specify your delegated user email in the Microsoft portal.

Before you begin
Create connection with Microsoft Exchange Online Spoke in strict mode

Role required: Microsoft admin

Procedure
1. Go to https://admin.microsoft.com/.
2. On the left panel, select **Resources Rooms & equipments**.
3. Select a resource of **Type** - **Room** to which you to configure strict mode.
4. On the room details, edit the **Delegates** field.
5. Specify the users or the delegated user email address.
6. Select **Save changes**.

> **Important:** Repeat the steps from Step 3 to Step 6 for every resource of the type **Room** on which you want to configure the strict mode.

Result
The user is configured as the delegated user.

What to do next
Setup strict mode OAuth connectivity with Microsoft Exchange Online

Setup strict mode OAuth connectivity with Microsoft Exchange Online

Create a strict mode app registry for Microsoft Exchange Online with ServiceNow instance for OAuth authorization.

Before you begin
Configure Microsoft Azure.

Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

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Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. Select **Connect to a third party OAuth Provider**
4. On the form, fill in the fields with the specified details.

Third-party OAuth Provider form

Field	Description
Name	Unique name to identify the record as a strict mode record, for example, MsExchange strict mode.
Client ID	Client ID created during the app creation in Microsoft Azure.
Client Secret	The password you generated when creating the app in Microsoft Azure.
Default Grant Type	Grant type used to establish the token. Select **Authorization Code**.
Authorization URL	OAuth authorization code endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/authorize`.
Token URL	OAuth server token endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/token>`.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

5. Right-click in the form header and select **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, MsExchange Strict mode default profile.
6. Create a OAuth Entity Scope.
   a. In the OAuth Entity Scopes related list, select **Insert a new row...**
   b. Enter the name as `Calendars.ReadWrite` for the scope.
   c. Enter the OAuth scope as `Calendars.ReadWrite`.
   d. Select the Save icon.

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e. Right-click the Application Registry form header and select Save.
The system creates the scope record. Similarly, create the following entity scopes:

- **Name**: Calendars.ReadWrite.Shared

  OAuth scope: Calendars.ReadWrite.Shared

- **Name**: offline_access

  OAuth Scope: offline_access

7. Select **Update**.
8. On the Application registry form, select the **OAuth Entity Profiles** related list.
In the following steps, you add the OAuth Entity Scopes that you created in Step 6 to the default profile.

   a. Select the default entity profile, for example, MsExchange Strict mode default profile.

   b. On the OAuth Entity Profile form, do the following:

      i. In the OAuth Entity Profiles Scopes section, double-click **Insert a new row**.

      ii. Select the Lookup icon ( ).

      iii. Select `Calendars.ReadWrite` that is assigned to the OAuth provider that you created in Step 6.

      iv. Repeat the previous steps and also add the following OAuth Entity Profiles Scopes created in Step 6:

      - `Calendars.ReadWrite.Shared`
      - `offline_access`

9. Select **Update**.

Result
The strict mode OAuth registration is added for Microsoft Exchange Online with strict mode OAuth entity profiles and OAuth entity scopes.

What to do next
Configure the connection and credential alias. You can configure the default alias or create your own alias.

To configure the default alias, refer to Configure strict mode Connection and Credential alias for Microsoft Exchange Online.

Configure strict mode Connection and Credential alias for Microsoft Exchange Online

Establish a strict mode connection and credential alias for Microsoft Exchange Online. Ensure that the values for the connection and credentials alias are set as specified.

Before you begin
Setup strict mode OAuth connectivity with Microsoft Exchange Online

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Note: Starting from Workplace Calendar Synchronization version 2.0.1, to synchronize the reservations automatically with Microsoft Exchange Online, create a connection with Microsoft Exchange Online spoke version 3.2.1. If you have upgraded to Workplace Calendar Synchronization version 2.0.1, then the following procedure is no longer required. For more information on how to install Microsoft Exchange Online spoke and to set up a connection, refer to Create a connection with Microsoft Exchange Online spoke.

Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon () on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Role required: admin

About this task

Configure the default connection and credential alias to use the default entity profile created during the strict mode application registry (in Setup strict mode OAuth connectivity with Microsoft Exchange Online). You can also create your own connection and credential alias, if you do not want to use the default alias. To create your own alias, refer to Create your own credential and connection alias for strict mode.

Procedure

1. Navigate to **All** > **Connection & Credentials** > **Credentials**.
2. Check if the OAuth entity profile is set as follows:
   Perform the following actions individually:

   a. Select **MS Graph 1**.
   On the form, check if the **OAuth Entity Profile** is set with the OAuth entity profile that was created when they created the strict mode app registry (performed in Setup strict mode OAuth connectivity with Microsoft Exchange Online). If it is not set, then set the profile as specified.

   b. To generate the OAuth token, select the **Get OAuth Token** related link.
   In the Microsoft Exchange login page that appears, login with the delegated user email credentials. You must be prompted for credential. When asked, specify the strict mode email credentials.

   Warning: If you are not prompted for the credential, it may use the credential of the logged-in user on the same browser, which is incorrect. You must close the browser and refresh to be prompted about the credential.

   c. Go back to the **Credentials** list.

   d. Select **MS Graph 2**.
   On the form, check if the **OAuth Entity Profile** is set with the OAuth entity profile that was created when they created the strict mode app registry (performed in Setup strict mode

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OAuth connectivity with Microsoft Exchange Online). If it is not set, then set the profile as specified.

> **Warning:** If you are not prompted for the credential, it may use the credential of the logged-in user on the same browser, which is incorrect. You must close the browser and refresh to be prompted about the credential.

Result
The Connection and credential alias is set.

- Configure new rooms(resources) in Microsoft Exchange Online to synchronize reservations.
- After synchronization, ensure that the meeting subject is unchanged. If the meeting subject is changed, use Microsoft PowerShell to make changes

What to do next
Configure Microsoft Exchange Online calendar provider in strict mode

Create your own credential and connection alias for strict mode

Configure your own connection and credential alias if you do not want to use the default alias created during the strict mode application registration. You can configure your calendar to use the alias as an override alias.

Before you begin
Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Role required: admin

About this task
The application by default providers connection and credential. Perform this procedure if you want to create your own connection and credential alias instead of using the default alias. If you want to use the default alias then refer to Configure strict mode Connection and Credential alias for Microsoft Exchange Online.

Procedure
1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.
2. Select **New**.
3. On the form, fill in the fields.

Connection & Credential Aliases form

Field	Description
Name	Name for the connection and credential alias.
ID	The field is automatically generated after you save the form based on the specified **Name**.

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Field	Description
Application	Ensure that the application is set as **Microsoft Exchange Online Spoke**
Parent alias	Select **sn_ex_online_spke.Microsoft_Exchange_Online**.

4. Select **Submit**.
   The Connection and Credential alias record is created. As the next step, you must create a OAuth 2.0 credential record.
5. Create an OAuth 2.0 credential to use in the newly created connection and credential alias record.

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Select **New**.

   c. Select **OAuth 2.0 Credentials**.

   d. On the form, fill in the fields.

   OAuth 2.0 Credentials form

Field	Descriptions
Name	Name of the credential. Provide a unique name to differentiate from the default credentials provided by the application.
Active	Option to activate the credential.
OAuth Entity Profile	Select the default OAuth entity profile that was generated when you performed the strict mode app registry in Setup strict mode OAuth connectivity with Microsoft Exchange Online.
Applies to	Specify how you want to apply to the MID servers.
Order	Order for the credential.

   e. Select **Submit**.
   The credential record is created.

   f. Open the credential record that you created.

   g. On the form, select **Get OAuth Token**.

   Note: If you are configuring strict mode, then you must perform this step.

   On the Microsoft window that opens, enter your credentials.

   h. Select **Update**.

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6. Configure connection for the connection and credential alias.

   a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.

   b. Select the connection and credential record that you created in the initial steps.

   c. On the form, in the Connections related list, select **New**.

   d. On the form, fill in the fields.

   HTTPs Connection form

Field	Description
Name	Name of the connection.
Credential	Select the credential record that you created in Step 5.
Connection alias	The field is automatically set with the connection and credential alias.
Connection URL	Enter https://graph.microsoft.com

   e. Select **Submit**.

Result
The connection and credential record is created with specified credentials and connections.

What to do next
To use it for the calendar provider, see Configure Microsoft Exchange Online calendar provider in strict mode.

Configure Microsoft Exchange Online calendar provider in strict mode

Configure Microsoft Exchange Online as a calendar provider in strict mode to synchronize reservations.

Before you begin
Ensure the following:

- As a delegated user, you must have valid mailbox in the Microsoft Exchange Online. The user is identified by the email address. The same email address must be specified in the delegated user email address where it is necessary.
- Configure strict mode Connection and Credential alias for Microsoft Exchange Online. If you want to use your own alias, then refer to Create your own credential and connection alias for strict mode.

Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

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Note: For calendars to synchronize successfully, you must have an email address that matches that of the provider.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select **New**.
3. On the form, fill in the fields.

Provider form

Field	Description
Name	Name of the calendar service. For example, Microsoft Exchange Strict mode
Description	Description of the calendar service.
Active	Option to activate the calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Microsoft Graph**.
Override alias?	Option to enable selection of your own connection and credential alias from **Provider Configuration**. If the option is not enabled, then the default connection and credential alias is used.
Connection & credential alias	Select the connection and credential alias that you created on your own for the calendar provider from **Provider Configuration**. This option appears only if you have selected the **Override alias?** option. If an alias is not specified, then the default connection and credential alias is used.
Sync start date time	The start date and time of the synchronization. The sync generates information from this date. Specify the **Sync start date time** manually from the subscription record of the reservable sync record for which you are syncing the past reservations. **Important:** The past sync duration must not exceed 1825 days.
Sync end date time	End date and time of the synchronization. The sync generates information until this date. The recommended setting is at least 5 years from the **Sync start date time**. **Important:** The past sync duration must not exceed 1825 days.

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Field	Description
Sync past reservations	Select the option to synchronize all the past reservations from the specified **Sync start date time** to the **Sync end date time**.
Delegated user email	Delegated user email address that is used to create reservations and to receive reservation-related notifications. Employees are considered as invitees in the reservation.

Note: The Strict mode field is deprecated and the user must set the Exchange Online Sync Integration Mode property to Strict, Personal, or Normal mode. Additionally, the strict mode email has been updated to Delegated user email.

4. Select **Submit**.

Result

The calendar provider is added.

Warning: Reservations that are created using calendar providers cannot be edited in the Workplace Reservation Management application.

What to do next

Run Instance scan to check Microsoft Exchange Online synchronization configuration. For more information, see Run Instance scan to check Microsoft Exchange Online synchronization configuration.

Create a personal authentication mode connection with Microsoft Exchange Online

As an admin, establish a personal authentication mode connection with Microsoft Exchange Online to synchronize reservations. A user-level authentication token is generated that enables you to create, update, or cancel reservations to synchronize events on the Microsoft Outlook calendar.

Integrations

System-to-system integrations are used for all actions that aren't triggered by the user and that must be synchronized with Microsoft Outlook. For all other user-triggered actions, the user's personal token is used.

Subsources to cater to reservations

A new Subsource, `sn_wsd_rest_api`, has been introduced to distinguish the reservations originating from the REST API. This action enables the use of system-to-system credentials to synchronize the reservations with Microsoft Outlook in personal authentication mode.

Handling upgrade scenarios

If the Strict mode is enabled for active calendar providers before the upgrade, the system property is automatically set to Strict after the upgrade.

If the Normal mode is configured for active calendar providers before the upgrade, the system property is automatically set to Normal after the upgrade.

The **Strict Mode** check box is no longer displayed in the calendar provider because the corresponding column has been deprecated in the calendar provider. To configure the Strict mode, you must set the system property `sn_wsd_rsvsync.sync_integration_mode` at instance level.

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Strict mode can now be configured using the system property at the instance level. For more information, see Set Workplace Calendar Synchronization properties.

Reservation restrictions

Review the restrictions for creating, updating, or deleting user reservations, as well as for blocker and group reservations, when personal authentication mode is enabled.

Restrictions

Reservation type	Description
Blocker reservations	When Personal mode is enabled, blocker reservations are created in the delegated user's calendar, with the requested for user added as an invitee. If the `sn_wsd_rsv.blocker_user` system property specifies a blocker user, the system creates the reservation in the delegated user's calendar and adds the blocker user as an invitee.
Onbehalf user reservation	The **This reservation is for** field is not displayed in personal authentication mode. In personal mode, you can't create Onbehalf user reservations because you don’t have access to other user's calendar. However, you can create on-behalf reservations for non-synchronized rooms.
Group reservations	Group reservations aren’t supported in Personal mode for synchronize-enabled rooms, even if the **Enable group reservations** check box is selected in the reservable module. You can create group reservations for non-synced rooms.
Create reservation	The following restrictions apply when creating reservations from theWorkplace Service Delivery (WSD) portal, Event planner, Quick Reservation, and Now Mobile: **In Personal mode** If the requested-for user doesn’t match the session user, the reservation can’t be created. **Note:** When the integration mode is Personal Authentication and reservations are created through non-ServiceNow interfaces such as IDEA panels or the Reservation REST APIs, the reservation is created in the Delegated User's mailbox, with the requestor added as an attendee. This behavior is the same as Strict mode. **In Strict or Normal mode** Reservations can be created without any restrictions.

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Restrictions (continued)

Reservation type	Description
Update or cancel reservation	The following restrictions apply when updating or canceling reservations from the WSD portal, Event planner, and Now Mobile: **In Normal mode** All reservations can be updated or canceled. **In Personal authentication mode** • If the Sync mailbox of the reservation is set to **other** (a reservation created in the delegated user calendar), the reservation can be updated or canceled in the delegated user calendar. • If the Sync mailbox is set to **user**, the following rules apply: ○ If the reservation is edited or canceled from sources other than WSD Portal, Quick Reservation, WSD Mobile, or Event Planner, it can't be updated or canceled. ○ If the session user (the person who is updating or canceling the reservation) doesn't match the requested-for user, the reservation can't be edited or canceled. ○ If a personal token doesn't exist for the user updating or canceling the reservation, the reservation can't be updated or canceled. ○ In all other cases, the reservation can be updated or canceled. **Note:** All the above reservations that can't be updated or canceled appear dimmed in the schedule view of event planner workspace. **In Strict mode** Users can only update or cancel a reservation if the Sync mailbox is set to **other** in Strict mode.

Configure Microsoft Azure

Set up a personal mode of authentication with Microsoft Azure to connect Microsoft Exchange Online with Workplace Calendar Synchronization.

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Before you begin

In Personal Authentication mode, a valid delegated user account with an associated email address on Microsoft Exchange Online is required. The user's identity is determined by their email address, which must also be specified in the delegated user email field, where applicable.

Role required: Exchange administrator

Procedure

1. Log in to the Microsoft Azure portal.
2. Navigate to **Azure Services** > **App registrations**.
3. **Optional:** If you don't have an app registration, select **New registration**.
   a. On the form, enter the **Name** of the registration.
   b. Select the **Supported account types** of your choice.
   c. **Optional:** Specify the **Redirect URL**.
   Specify the following details:
      i. Select the platform as **Web**.
      ii. Enter the URL in the following format: `https://<instance-Name>.service-now.com/oauth_redirect.do`
4. If you already have an app registration, select the app registration.
   a. Navigate to **Manage** > **Authentication**.
   b. Navigate to **Add a platform** > **Web applications** > **Web**.
   c. On the form, fill in the fields.

Configure web form

Field	Description
Redirect URL	Enter a URL in the format: `https://[instance].service-now.com/oauth_redirect.do`
Implicit grant	Select the **Access tokens** and **ID tokens** options.

   d. Select **Configure**.
5. Add a client secret.
   a. Navigate to **Manage** > **Certificates and secrets**.
   b. In the **Description** field, enter a short description about the secret.
   c. In the **Expires** field, select an expiry.
   d. Select **Add**.
   e. After adding client secret details, in the Client secrets section, copy the value by selecting **Copy to clipboard**.

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6. Add a permission.
   a. Navigate to **Manage** > **API permissions**.
   b. Select **Add a permission**.
   c. Select **Microsoft Graph**.
   d. Select **Delegated permissions**.
   e. In the **Calendars** Permission section, select **Calendars.ReadWrite**, **Calendars.ReadWrite.Shared**, and **Offline_access**.
   f. Select **Add permissions**.
   g. On the Configured permissions screen, select **Grant admin consent for ServiceNow**.

Result
Microsoft Exchange Online is set up with Microsoft Azure.

What to do next
Configure resource room and specify the delegated user email details. For more information, see Configure resource rooms in Microsoft Exchange Online.

Configure resource rooms in Microsoft Exchange Online

Specify your delegated user email in the Microsoft portal to access the resource calendar.

Before you begin
Role required: Microsoft admin

Procedure
1. Go to https://admin.microsoft.com/.
2. From the Navigation menu, select **Resources Rooms & equipments**.
3. Select a resource of **Type** - **Room** to configure strict mode to.
4. In the room details, edit the **Delegates** field.
5. Specify the users or the delegated user email address.
6. Select **Save changes**.

> **Important:** Repeat steps 3 through 6 for every resource of the type **Room** that you want to configure the strict mode on.

Result
The user is configured as the delegated user.

What to do next
Create a personal authentication mode application registry for Microsoft Exchange Online with ServiceNow instance for OAuth authorization. For more information, see Set up personal authentication mode OAuth connectivity with Microsoft Exchange Online.

Set up personal authentication mode OAuth connectivity with Microsoft Exchange Online

Create a personal authentication mode application registry for Microsoft Exchange Online with your instance for OAuth authorization.

Before you begin
Configure Microsoft Azure. For more information, see Configure Microsoft Azure.

Confirm that the application scope is set to **Workplace Calendar Synchronization**.

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Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select the **Microsoft Exchange Online_personalAuth** OAuth provider created for personal authentication.
3. On the Third-party OAuth Provider form, fill in the fields:

   For a description of the field values, see Third-party OAuth Provider form.
4. Right-click in the form header and select **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, Microsoft Exchange Online_personalAuth default profile.
5. Select the OAuth Entity Scopes list and verify that the following OAuth scopes are already defined for the OAuth provider profile:
   a. Calendars.ReadWrite
   b. Calendars.ReadWrite.Shared
   c. Offline_access
6. Select **Update**.

Result
The OAuth registration is added for Microsoft Exchange Online with personal authentication mode OAuth entity profiles and OAuth entity scopes.

Configure a personal authentication mode Connection and Credential alias for Microsoft Exchange Online

Establish a personal authentication mode connection and credential alias for Microsoft Exchange Online. Confirm that the values for the connection and credentials alias are set as specified.

Before you begin
Confirm that the application scope is set to **Workplace Calendar Synchronization**.

Role required: admin

About this task
Configure the default connection and credential alias to use the default entity profile created during the personal authentication mode application registry.

Procedure

1. Navigate to **All** > **Connection & Credentials** > **Connection & Credential Aliases**.
2. Select Microsoft_Exchange_Online_PersonalAuth connection and credential child alias type created for personal authentication.
3. Perform the following to check the HTTP Connection details:
   a. On the Connection & Credential Aliases form, under the **Connections** tab, select the connection name.
   b. In the **Connection alias** field, verify that the child alias inherits the properties from the parent alias.

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c. Verify that the Connection URL is set to https://graph.microsoft.com https://graph.microsoft.com.

d. Select **Update**.

4. Perform the following to check the OAuth Credentials details:

a. On the Connection & Credential Aliases form, under the **Connections** tab, select the credential name.

b. On the OAuth 2.0 Credentials form, verify that the **OAuth Entity Profile** is set with the default OAuth entity profile that was created when creating the personal authentication mode app registry.

5. Perform the following to request a new OAuth access token using the configured OAuth entity profile created for personal authentication:

a. Navigate to **All** > **Connection & Credentials** > **Credentials**.

b. Select **Ms Graph 1**.

c. Set the OAuth Entity Profile to the default personal authentication OAuth entity profile that was generated when you performed the personal authentication mode application registry.

d. Select **Get OAuth Token**.
In the Microsoft Exchange login page that appears, log in with the delegated user email credentials.

6. Perform the following to request a new OAuth access token using the configured OAuth entity profile created for personal authentication:

a. Navigate to **All** > **Connection & Credentials** > **Credentials**.

b. Select **Ms Graph 2**.

c. Set the OAuth Entity Profile to the default personal authentication OAuth entity profile that was generated when you performed the personal authentication mode application registry.

d. Select **Get OAuth Token**.
In the Microsoft Exchange login page that appears, log in with the delegated user email credentials.

Result
The Connection and credential alias is set.

Configure your own connection and credential alias for personal authentication mode

Configure your own connection and credential alias if you don't want to use the default alias created during the personal authentication mode application registration. You can configure your calendar to use the alias as an override alias.

Before you begin
Note: Configure your own connection and credential alias only when multiple delegated user emails are required. Ensure that the alias is specified on the calendar provider as well.

Confirm that the application scope is set to **Workplace Calendar Synchronization**.

Role required: admin

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About this task

The application by default provides a connection and credential. Perform this procedure if you want to create your own connection and credential alias instead of using the default alias. If you want to use the default alias, refer to Configure a personal authentication mode Connection and Credential alias for Microsoft Exchange Online.

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases**.
2. Select **New**.
3. On the form, fill in the fields.

Connection & Credential Aliases form

Field	Description
Name	Name for the connection and credential alias.
ID	The field is automatically generated after you save the form based on the specified **Name**.
Application	Ensure that the application is set as **Workplace Calendar Synchronization**
Parent alias	Select **sn_ex_online_spke.Microsoft_Exchange_Online**.

4. Select **Submit**.
   The Connection and Credential alias record is created. As the next step, you must create a OAuth 2.0 credential record.
5. Create an OAuth 2.0 credential to use in the newly created connection and credential alias record.

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Select **New**.

   c. Select **OAuth 2.0 Credentials**.

   d. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Descriptions
Name	Name of the credential. Provide a unique name to differentiate from the default credentials provided by the application.
Active	Option to activate the credential.
OAuth Entity Profile	Select the default OAuth entity profile that was generated when you performed the personal authentication mode app registry in Set up personal authentication mode OAuth connectivity with Microsoft Exchange Online.

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Field	Descriptions
Applies to	Specify how you want to apply to the MID Servers.
Order	Order for the credential.

e. Select **Submit**.
The credential record is created.

f. Open the credential record that you created.

g. On the form, select **Get OAuth Token**.

Note: If you're configuring a strict mode, then you must perform this step.

On the Microsoft window that opens, enter your credentials.

h. Select **Update**.

6. Configure the connection for the connection and credential alias.

a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.

b. Select the connection and credential record that you created in the initial steps.

c. In the Connections related list, select **New**.

d. On the form, fill in the fields.

HTTPs Connection form

Field	Description
Name	Name of the connection.
Credential	Select the credential record that you created in Step 5.
Connection alias	The field is automatically set with the connection and credential alias.
Connection URL	Enter https://graph.microsoft.com

e. Select **Submit**.

Configure the Microsoft Exchange Online calendar provider in personal authentication mode

Enhance your workplace reservation experience with the Workplace Calendar Synchronization application to synchronize reservations with your calendar provider. Configure Microsoft Exchange Online to synchronize reservations with your calendar provider using personal authentication mode.

About this task

The Workplace Calendar Synchronization application uses the calendar provider as the primary source, confirming that events are updated and confirmed for room bookings through the Workplace Reservation Management portal.

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Before you begin
Confirm the following:

- As a personal authentication mode user, you must have a valid mailbox in the Microsoft Exchange Online. The user is identified by the email address. The same email address must be specified in the delegated user email address where it's necessary.

Confirm that the application scope is set to **Workplace Calendar Synchronization**.

Note: For calendars to synchronize successfully, you must have an email address that matches that of the provider.

Role required: sn_wsd_rsvsync.admin

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select **New**.
3. On the Provider form, fill in the fields.

   For a description of the field values, see Provider form.

   Note: The **Strict mode** field is deprecated and you must set the Exchange Online Sync Integration Mode property to Strict, Personal, or Normal mode. Additionally, the strict mode email has been updated to Delegated user email.

4. Select **Submit**.

What to do next
To access resource calendars and generate a subscription ID, you must add a Reservable Sync Configuration. For more information, see Add multiple Reservable Sync Configurations.

Execute an instance scan to check the synchronization configuration. For more information, see Run Instance scan to check Microsoft Exchange Online synchronization configuration.

Configure the webhook registry of Microsoft Exchange Online spoke

Configure callback URL for communication between the Workplace Calendar Synchronization application and Microsoft Exchange Online calendar.

Before you begin
Ensure that the application scope is set to **Microsoft Exchange Online Spoke**. Otherwise, do the following:

1. Select the Application scope icon () on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Microsoft Exchange Online Spoke**.
4. Refresh the page.

Role required: admin

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Procedure

1. Navigate to **All** > **Microsoft Exchange Online Spoke** > **Webhook Registry**.
2. Select the **WSDRS Event Subscription** registry.
   The webhook registry is provided by default with the application.
3. On the form, select **Callback URL**.
   The **Client State** and **Callback URL** is automatically generated.
4. Select **Update**.

Create single or multiple calendar providers with Microsoft Exchange Online

For the Microsoft Exchange Online provider, configure single or multiple calendar providers.

Before you begin

You must have Microsoft Exchange Online spoke version 3.2.4 or later installed.

Important: Multi-provider is not supported or is not the same as Exchange hybrid configurations.

For strict mode:

- Ensure that every delegated user (in the calendar provider) has a different connection & credential alias, connection, and credential records. However, you can reuse the same OAuth Entity profile in all the credential records.
- While performing the **Get OAuth token** action for each credential, you must be prompted for credential. When asked, specify the delegated user email credentials.

  Note: If you are not prompted for the credential, it may use the credential of the logged-in user on the same browser, which is incorrect. You must close the browser and refresh to be prompted about the credentials.

Role required: admin

Procedure

1. For normal mode user:
   a. Configure Connection and credential alias for Microsoft Exchange Online using the default credentials and connections or Create your own connection and credential alias for Microsoft Exchange Online.
   b. Create multiple calendar providers and specify the alias. Configure Microsoft Exchange Online calendar provider
2. For delegated user:
   - If there is a single delegated user, do the following:
     - Configure strict mode Connection and Credential alias for Microsoft Exchange Online or Create your own credential and connection alias for strict mode.
     - Create a calendar provider. Refer to Configure Microsoft Exchange Online calendar provider in strict mode.
   - For multiple delegated users:

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- Create connection and credential record for each delegated user. Refer to Configure strict mode Connection and Credential alias for Microsoft Exchange Online or Create your own credential and connection alias for strict mode.
- Create calendar providers for each user and specify the alias. Refer to Configure Microsoft Exchange Online calendar provider in strict mode.

Result
Multiple providers are created for a single provider.

Approve a reservation

Review employee reservations raised using Workplace Reservation Management and approve or reject them.

Before you begin
Role required: approver_user

Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select the reservation that you want to approve or reject.
3. Review the details of the reservation.
4. Approve or reject the reservation by selecting Approve or Reject.

> **Note:** If approval for a reservation is rejected, a delete request is sent to the room calendar to release the room.

Google Calendar - Calendar synchronization

Create a connection with Google Calendar and synchronize reservations made using the Workplace Reservation Management application. You can synchronize all the reservations that are made using the Workplace Reservation Management to the Google Calendar and vice versa.

The reservation synchronization from a Google Calendar to the Workplace Reservation Management is performed using various approaches like events, and occurrences.

> **Important:** The application does not support a strict mode configuration for Google Calendar.

Synchronization from Workplace Reservation Management to Google Calendar

The synchronization process from Workplace Reservation Management to Google is performed using the Google Calendar spoke. You can configure a connection with Google using the Flow designer.

The synchronization process includes the following steps:

1. Install Google Calendar Spoke.
2. Set up Google Calendar spoke
3. Authenticate ServiceNow with Google. Refer to Authenticate Google for calendar synchronization.
4. Configuring the Google Calendar Spoke connection using the Flow designer. Refer to Create a Connection and credential record for Google.
5. Creating the Google Calendar provider. Refer to Configure Google as calendar provider.

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The application also enables you to create your own connection and credential alias instead of using the default alias created by using the flow designer.

Synchronization from Google Calendar to Workplace Reservation Management

The reservation synchronization from the Google Calendar to Reservation portal is done by pulling the latest calendar updates in Google Calendar by using a scheduled job, *WSDRS Sync Calendar items*. All the events related to the sync-enabled rooms are read and updated in the Workplace Reservation Management application. The application creates Create, Update, Delete, and Read events in the **Events** table.

The scheduled job, *WSDRS Sync Calendar items*, is provided with the application to get the latest changes for all the active reservable sync configurations. The scheduled job is set to **False** by default and it must be enabled to start synchronizing. By default, the scheduled job is set to run for every five minutes. However, you can set the scheduled job time as you want. At any time, you can also manually execute it.

An approach called, Delta synchronization is used by the Workplace Calendar Synchronization application. With Delta synchronization, you retrieve only the incremental changes made on a resource email id of the calendar using a reference point called as synchronization token. That is, for each room (each reservable sync record), linked to the on-premises calendar provider you get the synchronization tokens, which are the reference points to get the update from the calendar in increments.

- Based on the **Page size**, **Sync batch size** and the **Sync batch interval**, the information is retrieved by the synchronization tokens. For example, if you specified the values as **5**, **500**, and **60** respectively (in the previous fields). It means that you can raise 500 requests in an interval of 60 seconds. The synchronization results five changes in a page.
- When you create a reservable sync configuration record under the Google calendar, you must ensure that it is activated.
- When the sync record is activated, a flow is triggered and a synchronization token for that reservable synchronization record is created in the **Sync Deltas** module.
- The scheduled job, *WSDRS Sync Calendar items*, is provided with the application to get the latest changes for all the active reservable sync configurations. The scheduled job is set to **False** by default and it must be enabled to start synchronizing. By default, the scheduled job is set to run for every five minutes. However, you can set the scheduled job time as you want. At any time, you can also manually execute it.
- The changes made on the reservable sync configurations are created as events in the **Events** module. The application creates Create, Update, Delete, and Read, events for the Google Calendar.
- For each sync record, an event is created. Depending on the page size specified on the calendar provider, the changes are displayed. If there are any pending changes, it is displayed during the next scheduled job run.
- The API that is used to get the synchronization tokens, saves the response in the **Response** field of the event. The API provides changes made on a single reservation, multi-reservation, and the parent recurring reservation.
- Using the response created by the API, a reservation is created in the Workplace Reservation Management application.
- With every scheduled job run, the synchronization token is also updated which is used as the reference point for the next synchronization.

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Synchronizing past reservations

he Workplace Calendar Synchronization enables you to also synchronize reservations made in the past. You can specify the date and time range in the **Sync start date time** and **Sync end date time** fields. For the on-premises calendar, the following conditions must be met to sync past reservations:

- The calendar provider that is the Google Calendar calendar provider that you configured must be active.
- The **Synchronize past reservations** field must be selected.
- The reservable sync configuration for which you want to sync past reservations must be active.

Note: After you enable the **Synchronize past reservations**, you must navigate to the locations of each reservable sync configuration record and select **Sync Location**.

'No request' handling

No request is a mechanism to validate the generated syntax of the payload of an event created for the calendar. But, instead of sending the event to the calendar provider, it is only created. The admin can validate the payload content of the event (JSON) to ensure that is generated as expected. 'No request' ensures that the application does not make any API calls to the calendar provider when you create, update, or cancel a reservation in the Workplace Reservation Management application.

Authenticate Google for calendar synchronization

Set up Google to start with reservation synchronization with the Workplace Reservation Management application. Create scopes, credentials and more.

Before you begin

Ensure the following:

1. Install Google Calendar Spoke.
2. Set up Google Calendar spoke

Role required: Google Admin

Procedure

1. Log in to https://admin.google.com/.
2. **Optional:** If you want to manage users for the Google account, do the following:
   a. Select **Manage** in the **Users** card on the homepage.
   b. Add, delete, or update user details.
3. Log in to https://console.cloud.google.com/ with your google workspace credentials.
4. Create a project to get the OAuth authentication and the permission to use the Google Calendar from ServiceNow.
   a. Select **Select a project** on the top panel.
   b. On the select a project window, select **NEW PROJECT**.
   c. Enter project details.

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i. Specify the **Project name**.

ii. Select your **Organization**.

iii. In the **Location** field, select **Browse** and select your organization.

d. Select **CREATE**.
A notification is displayed that the project is created.

e. In the notification window, select **SELECT PROJECT**.

5. Set Google Calendar API permissions.

a. On the homepage, select **APIs & Services**.

b. On the top panel, select **+ ENABLE APIS AND SERVICES**.

c. On the Welcome to the API Library page, under the Google Workspace, select **Google Calendar API**.

d. On the Google Calendar API details page, select **ENABLE**.

The Google calendar API is enabled on your project.

6. Create credentials to use when creating a connection and credential for Google

a. On the Google Calendar API details page, select **CREATE CREDENTIALS**.

b. On the Google Calendar API credentials form, fill in the fields:

i. In the **Select an API** field, select **Google Calendar API**.

ii. Under the **What data will you be accessing?** section, select **User data** to create an OAuth application.

c. Select **NEXT**.

d. In the OAuth Consent Screen section, fill the fields:

i. In the **App name** field, specify a name for the OAuth app.

ii. In the **User support email** field, specify the user email to which consent-related questions can be sent.

iii. In the App logo section, select **BROWSE** to upload a logo for the OAuth app.

iv. In the Developer contact information section, specify the email address to which any project-related changes and updates must be sent.

e. Select **SAVE AND CONTINUE**.

7. Add or remove scopes.
Specify permissions to access the Google Calendar API.

a. Under Scopes section, select **ADD OR REMOVE SCOPES**.

b. Select the following scopes:

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- https://www.googleapis.com/auth/calendar
- https://www.googleapis.com/auth/calendar.events

c. Select **UPDATE**.

d. Select **SAVE AND CONTINUE**.

8. Generate the OAuth Client ID and related details.

a. Under the OAuth Client ID section, in the **Application type** field, select **Web application**.

b. In the **Name** field, enter a name for the application.

c. Under the Authorized JavaScript origins, select **+ADD URL** to add the JavaScript URL.

d. Under the Authorized redirect URIs section, select **+ADD URL** to add a redirect URL.
Enter the URL of your ServiceNow instance.

e. Select **CREATE**.
The credentials for the OAuth application are created.

f. Select **DOWNLOAD** to download the JSON file that contains the credential details.

g. Copy and save the Client ID.

9. Select **DONE**.

Create a Connection and credential record for Google

Connect Google with the ServiceNow using the flow designer to synchronize reservations.

Before you begin

Ensure the following:

- Authenticate Google for calendar synchronization.
- Ensure that you have the Super admin role in Google.

Role required: admin

About this task

Configure the Google connection and credential record. Perform steps in the flow designer. Configure the default Google Calendar spoke. You can also create your own connection and credential alias, if you don't want to configure the default Google Calendar spoke using the flow designer.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Select the **Connections** tab.
3. In the **Search all connections** bar, search for Google.
4. Select **Google_calendar (sn_gcalendar_spoke)**.
5. On the Google_Calendar card, select **View Details**.

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6. Select **Configure** next to the **Google_Calendar** connection.
7. On the Configure Connection window, enter the following credentials:
   - **Connection URL**: Enter `https://www.googleapis.com`.
   - **API Version**: Enter `v3`. The field is auto-filled.
   - **OAuth Client ID**: Enter the client ID that you copied while authenticating Google with ServiceNow in Authenticate Google for calendar synchronization.
   - **OAuth Client Secret**: Enter the client secret that you copied while authenticating Google with ServiceNow in Authenticate Google for calendar synchronization.
   - **OAuth Redirect URL**: Enter `https://<instance-name>.service-now.com/oauth_redirect.do`
   - **OAuth Authorization URL**: Enter `https://accounts.google.com/o/oauth2/v2/auth`
   - **OAuth Token URL**: Enter `https://www.googleapis.com/oauth2/v4/token`
8. Select **Configure and Get OAuth Token**.
9. In the Google window, log in to the Google Workspace and get the OAuth Token. Enter your Google Super admin credentials.

Result

The Google connection and credential record is created. To view the connection and credential alias record, navigate to **All** > **Connections & Credentials** > **Connection & Credential Aliases** and select **Google_Calendar**.

What to do next

Configure Google as calendar provider

Create your own connection and credential alias for Google

Instead of using the default **Google_Calendar** alias, you can create your own connection and credential alias to use it with your Google Calendar provider.

Before you begin

Setup OAuth connectivity with Google Calendar

Ensure that the application scope is set to **Google Calendar Spoke**. Otherwise, do the following:

1. Select the Application scope icon () on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Google Calendar Spoke**.
4. Refresh the page.

Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.
2. Select **New**.
3. On the form, fill in the fields.

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Connection & Credential Aliases form

Field	Description
Name	Name for the connection and credential alias.
ID	The field is automatically generated after you save the form based on the specified **Name**.
Application	Ensure that the application is set as **Google Calendar Spoke**
Parent alias	Select **sn_gcalendar_spoke.Google_Calendar**.

4. Select **Submit**.
   The Connection and Credential alias record is created. As the next step, you must create a OAuth 2.0 credential record.
5. Create an OAuth 2.0 credential to use in the newly created connection and credential alias record.

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Select **New**.

   c. Select **OAuth 2.0 Credentials**.

   d. On the form, fill in the fields.

OAuth 2.0 Credentials form

Field	Descriptions
Name	Name of the credential. Provide a unique name to differentiate from the default credentials provided by the application.
Active	Option to activate the credential.
OAuth Entity Profile	Select the default OAuth entity profile that was generated when you performed the app registry in Setup OAuth connectivity with Google Calendar.
Applies to	Specify how you want to apply to the MID servers.
Order	Order for the credential.

   e. Select **Submit**.
   The credential record is created.

   f. Open the credential record.

   g. On the form, select **Get OAuth Token**.

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On the Google window that opens, enter your credentials.

h. Select **Update**.

6. Configure connection for the connection and credential alias.

a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.

b. Select the connection and credential record that you created in the initial steps.

c. On the form, in the Connections related list, select **New**.

d. On the form, fill in the fields.

HTTPs Connection form

Field	Description
Name	Name of the connection.
Credential	Select the credential record that you created in Step 5.
Connection alias	The field is automatically set with the connection and credential alias.
Connection URL	Enter https://www.googleapis.com.

e. Select **Submit**.

Result
The connection and credential record is created with specified credentials and connections.

What to do next
Configure Google as calendar provider

Setup OAuth connectivity with Google Calendar

Create an application registry for Google Calendar with ServiceNow to synchronize reservations. Perform this app registration if you want to create your own connection and credential alias for Google Calendar.

Before you begin
Authenticate Google for calendar synchronization

Ensure that the application scope is set to **Google Calendar Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Google Calendar Spoke**.
4. Refresh the page.

Role required: admin

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Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **New**.
3. Select **Connect to a third party OAuth Provider**
4. On the form, fill in the fields with the specified details.

Third-party OAuth Provider form

Field	Description
Name	Unique name to identify the record, for example, Google calendar Own.
Client ID	Client ID created during the app authentication in Google.
Client Secret	The password you generated when creating the app in Google.
Default Grant Type	Grant type used to establish the token. Select **Authorization mode**.
Authorization URL	OAuth authorization code endpoint. Enter `https://accounts.google.com/o/oauth2/v2/auth`.
Token URL	OAuth server token endpoint. Enter `https://www.googleapis.com/oauth2/v4/token`.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

5. Right-click in the form header and select **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, Google Calendar Own default profile.
6. Create a OAuth Entity Scope.
   a. In the OAuth Entity Scopes related list, select **Insert a new row...**
   b. Enter the name as `Calendar` for the scope.
   c. Enter the OAuth scope as `Calendar`.
   d. Select the Save icon.
   e. Similarly, create another scope and enter the following details:
      - **Name**: calendar.events
      - **OAuth scope**: calendar.events
   f. Right-click the Application Registry form header and select Save.
   The system creates the scope records.

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7. Select **Update**.
8. On the Application registry form, select the **OAuth Entity Profiles** related list.
   In the following steps, add the OAuth Entity Scopes that you created in Step 6 to the default profile.

   a. Select the default entity profile, for example, Google Calendar Own default profile.

   b. On the OAuth Entity Profile form, do the following:

      i. In the OAuth Entity Profiles Scopes section, double-click **Insert a new row**.

      ii. Select the Lookup icon ( ).

      iii. Select `calendar` that is assigned to the OAuth provider that you created in Step 6.

      iv. Repeat the previous steps and also add `calendar.events`.

9. Select **Update**.

Result
The OAuth connectivity is added for Google.

What to do next
Create your own connection and credential alias for Google

Configure Google as calendar provider

Configure Google as calendar provider to start synchronizing reservation. Link it to the connection and credential alias and configure rooms to start synchronizing.

Before you begin
Ensure the following:

- You have created the connection and credential alias. If not, do one of the following:
  - Configure the default connection and credential alias. Refer to Create a Connection and credential record for Google.
  - Create your own connection and credential alias if you do not want to use the default alias. Refer to .
- Application scope is set to **Google Calendar Spoke**. If it is not set, complete the following:

  1. Select the Application scope icon ( ) your Employee Center homepage.
  2. In the drop- down, select **Application scope**.
  3. In the filter navigator, search and select **Google Calendar Spoke**.
  4. Refresh the page.

Note: For calendars to synchronize successfully, you must have an email address that matches that of the provider.

Role required: admin

About this task
Configure Google Calendar as a calendar provider. If you want to use your own alias, enable the **Override alias** option and specify the alias.

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Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select **New**.
3. On the form, fill in the fields.

Provider form

Field	Description
Name	Name of the calendar service. For example, Google Calendar.
Description	Description of the calendar service.
Active	Option to activate the calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Google Calendar** from **Provider Configuration**.
Override alias?	Option to enable selection of a Connection and credential alias from **Provider Configuration**. Select this option if you want to use your own connection and credential alias only. If the option is not selected, the default connection and credential alias, **Google_Calendar** is used.
Connection & credential alias	Select the Connection and credentials alias that you created on your own from **Provider Configuration**. This option appears only if you have selected the **Override alias?** option. If an alias is not specified, then the default connection and credential alias is used.
Page size	Page size of the calendar items.
Sync batch size	Size of batches during a synchronization. This field is automatically set to **500**, which means a sync batch handles 500 items at a time. If there are more than 500 items, the rest is displayed in the next sync batch.
Sync batch interval	Time interval between sync batches. This field is automatically set to **60** seconds.
Sync start date time	The start date and time of the synchronization. The sync generates information from this date. **Important:** The past sync duration must not exceed 1825 days.
Sync end date time	End date and time of the synchronization. The sync generates information until this date. The recommended setting is at least 5 years from the **Sync start date time**.

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Field	Description
	Important: The past sync duration must not exceed 1825 days.
Sync past reservations	Select the option to synchronize all the past reservations from the specified **Sync start date time** to the **Sync end date time**.

4. Select **Submit**.

Result
Google Calendar is configured as calendar provider.

What to do next

- Set the scheduled job, *WSDRS Sync Calendar items* to **True**. The scheduled job is set to **False** by default and it must be enabled to start synchronizing. You can set the scheduled job time as you want. At any time, you can also manually execute it.

- If you enabled the **Sync past reservations** field, you must perform the following actions:

  1. Scroll down to Reservable Sync Configurations related list
  2. In the **Location** column, select location.
  3. On the Location form, select **Sync Location**.
  Perform Step 2 and Step 3 on all the Reservable sync config records.

- Add multiple Reservable Sync Configurations

Create a personal authentication mode connection for Google

As an admin, establish a personal authentication mode connection for Google Calendar to synchronize reservations. A user-level authentication token is generated that enables you to create, update, or cancel reservations to synchronize events on the Google Calendar.

Reservation restrictions

Review the restrictions for creating, updating, or deleting user reservations, as well as for blocker and group reservations, when personal authentication mode is enabled.

Restrictions

Reservation type	Description
Blocker reservations	When Personal mode is enabled, blocker reservations are created in the delegated user's calendar, with the requested for user added as an invitee. If the `sn_wsd_rsv.blocker_user` system property specifies a blocker user, the system creates the reservation in the delegated user's calendar and adds the blocker user as an invitee.
Onbehalf user reservation	The **This reservation is for** field is not displayed in personal authentication mode. In personal mode, you can't create Onbehalf user reservations because you don’t have access to other user's calendar. However, you

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Restrictions (continued)

Reservation type	Description
	can create on-behalf reservations for non-synchronized rooms.
Group reservations	Group reservations aren't supported in Personal mode for synchronize-enabled rooms, even if the **Enable group reservations** check box is selected in the reservable module. You can create group reservations for non-synced rooms.
Create reservation	The following restrictions apply when creating reservations from theWorkplace Service Delivery (WSD) portal, Event planner, Quick Reservation, and Now Mobile: **In Personal mode** If the requested-for user doesn't match the session user, the reservation can't be created. **Note:** When the integration mode is Personal Authentication and reservations are created through non-ServiceNow interfaces such as IDEA panels or the Reservation REST APIs, the reservation is created in the Delegated User's mailbox, with the requestor added as an attendee. This behavior is the same as Strict mode. **In Strict or Normal mode** Reservations can be created without any restrictions.
Update or cancel reservation	The following restrictions apply when updating or canceling reservations from the WSD portal, Event planner, and Now Mobile: **In Normal mode** All reservations can be updated or canceled. **In Personal authentication mode** • If the Sync mailbox of the reservation is set to **other** (a reservation created in the delegated user calendar), the reservation can be updated or canceled in the delegated user calendar. • If the Sync mailbox is set to **user**, the following rules apply: ○ If the reservation is edited or canceled from sources other than WSD Portal, Quick Reservation, WSD Mobile, or Event Planner, it can't be updated or canceled.

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Restrictions (continued)

Reservation type	Description
	○ If the session user (the person who is updating or canceling the reservation) doesn't match the requested-for user, the reservation can't be edited or canceled. ○ If a personal token doesn't exist for the user updating or canceling the reservation, the reservation can't be updated or canceled. ○ In all other cases, the reservation can be updated or canceled. **Note:** All the above reservations that can't be updated or canceled appear dimmed in the schedule view of event planner workspace. **In Strict mode** Users can only update or cancel a reservation if the Sync mailbox is set to **other** in Strict mode.

Set up personal authentication mode OAuth connectivity with Google

Create a personal authentication mode application registry for Google Calendar with your instance for OAuth authorization.

Before you begin

Authenticate Google for calendar synchronization

Ensure that the application scope is set to **Google Calendar Spoke**. Otherwise, do the following:

1. Select the Application scope icon ( ) on the top-right corner of your Employee Center homepage.
2. In the drop- down, select the option consisting **Application scope:**.
3. In the filter navigator, search and select **Google Calendar Spoke**.
4. Refresh the page.

Role required: admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Select **Google Calendar** OAuth Provider from the list of Application Registries.
3. On the form, fill in the fields with the specified details.

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Third-party OAuth Provider form

Field	Description
Name	Unique name to identify the record, for example, Google Calendar.
Client ID	Client ID created during the app authentication in Google.
Client Secret	The password you generated when creating the app in Google.
Default Grant Type	Grant type used to establish the token. Select **Authorization Code**.
Authorization URL	OAuth authorization code endpoint. Enter `https://accounts.google.com/o/oauth2/v2/auth`.
Token URL	OAuth server token endpoint. Enter `https://www.googleapis.com/oauth2/v4/token`.
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

4. Right-click in the form header and select **Save**.
   A system-generated OAuth entity profile is created and displayed in the OAuth Entity Profiles related list. For example, Google Calendar.

Result
The OAuth connectivity is added for Google.

Configure a personal authentication mode Connection and Credential alias for Google

Establish a personal authentication mode connection and credential alias for Google Calendar. Confirm that the values for the connection and credentials alias are set as specified.

Before you begin
Confirm that the application scope is set to Google Calendar Spoke.

Role required: admin

About this task
Configure the default connection and credential alias to use the default entity profile created during the personal authentication mode application registry.

Procedure
1. Navigate to **All** > **Connection & Credentials** > **Connection & Credential Aliases**.
2. Select **Google Calendar Personal Auth** connection and credential child alias type created for personal authentication.
3. Perform the following to check the HTTP Connection details:

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a. On the Connection & Credential Aliases form, under the **Connections** tab, select **Google Personal Auth Connection** connection name.

b. In the **Connection alias** field, verify that the child alias inherits the properties from the parent alias.

c. Verify that the Connection URL is set to https://www.googleapis.com https://www.googleapis.com.

d. Select **Update**.

4. Perform the following to check the OAuth Credentials details:

a. On the Connection & Credential Aliases form, under the **Connections** tab, select the credential name.

b. On the OAuth 2.0 Credentials form, verify that the **OAuth Entity Profile** is set with the default OAuth entity profile that was created when creating the personal authentication mode app registry.

c. On the OAuth 2.0 Credentials form, verify that the **Integration Type** is set to Personal.

Result

The Connection and Credential alias is set.

Microsoft Exchange On-Premises - Calendar synchronization

Create a connection with Microsoft Exchange On-Premises and synchronize reservations made using the Workplace Reservation Management application. You can synchronize all the reservations that are made using the Workplace Reservation Management to the On-Premises calendar and vice versa. The reservation synchronization from an On-Premises calendar to the Workplace Reservation Management is performed using various approaches like subscriptions, synchronization tokens, events, and occurrences.

The Microsoft Exchange On-Premises, unlike other calendar providers, isn't accessible online. The provider is remote and is accessible only by the organization locally. To synchronize calendar reservations with this on-premise setup, the Workplace Calendar Synchronization application enables you to communicate using the MID server. A MID server is installed in the same local setup where the Microsoft Exchange On-Premises is installed. This way, a communication can be established with the MID server and communicate frequently. To support the on-premises calendar provider, a new calendar processor, Microsoft EWS is supported in the Workplace Calendar Synchronization application.

1. Connect MID server with ServiceNow®.
2. Create a connection and credential alias.

Important: The Workplace Reservations for Microsoft Outlook Add-in application does not support Microsoft Exchange On-Premises.

Synchronization from Workplace Reservation Management to Microsoft Exchange On-Premises

Synchronize reservations to the on-premises calendar from Workplace Reservation Management by communicating using the MID server.

- Install Microsoft Exchange Server Spoke.
- Set up the Microsoft Exchange Server spoke
- Connect Microsoft Exchange On-Premises MID server with ServiceNow

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- After configuring the MID server, create a connection and credential alias to connect it with the calendar provider. For more information, refer to Create a Connection and credential alias for Microsoft Exchange On-Premises.
- After setting up the connection and credential aliases, configure Microsoft Exchange On-Premises as a calendar provider. For more information, refer to Configure Microsoft Exchange On-Premises as calendar provider. To support the on-premises calendar provider, a new calendar processor, Microsoft EWS is added.

Synchronization from Microsoft Exchange On-Premises calendar to Workplace Reservation Management

The reservation synchronization from the Microsoft Exchange On-Premises calendar to the Reservation portal is done by running a timely scheduled job, *`WSDRS Sync Calendar items`*.

An approach called, Delta synchronization is used by the Workplace Calendar Synchronization application. With Delta synchronization, you retrieve only the incremental changes made on a resource email id of the calendar using a reference point called as synchronization token. That is, for each room (each reservable sync record), linked to the on-premises calendar provider you get the synchronization tokens, which are the reference points to get the update from the calendar in increments.

- Based on the **Page size**, **Sync batch size** and the **Sync batch interval**, the information is retrieved by the synchronization tokens. For example, if you specified the values as **5**, **500**, and **60** respectively (in the previous fields). It means that you can raise 500 requests in an interval of 60 seconds. The synchronization results five changes in a page.
- When you create a reservable sync configuration record under the on-premises calendar, you must ensure that is activated.
- When the sync record is activated, a flow is triggered and a synchronization token for that reservable synchronization record is created in the **Sync Deltas** module.
- The scheduled job, *`WSDRS Sync Calendar items`*, is provided with the application to get the latest changes for all the active reservable sync configurations. The scheduled job is set to **False** by default and it must be enabled to start synchronizing. By default, the scheduled job is set to run for every five minutes. However, you can set the scheduled job time as you want. At any time, you can also manually execute it.
- The changes made on the reservable sync configurations are created as events in the **Events** module. The application creates Create, Update, Delete, Read, and Retrieve attendees events for Microsoft Exchange On-Premises calendar.
- For each sync record, an event is created. Depending on the page size specified on the calendar provider, the changes are displayed. If there are any pending changes, it is displayed during the next scheduled job run.
- The API that is used to get the synchronization tokens, saves the response in the **Response** field of the event. The API provides changes made on a single reservation, multi-reservation, and the parent recurring reservation.
- Using the response created by the API, a reservation is created in the Workplace Reservation Management application.
- With every scheduled job run, the synchronization token is also updated which is used as the reference point for the next synchronization.

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Strict mode

The Workplace Calendar Synchronization application enables you to configure your connections and configurations with Microsoft Exchange On-Premises in strict mode as well. In strict mode, events are not directly created in an employee's calendar, instead, they are sent to a general email address. Employees are invited to the event. You can specify a strict mode email id through which you want to sync reservations. Employees can only make changes using the Workplace Reservation Management application.

To enable strict mode, you can enable the **Strict mode** option in the while configuring the on-premises calendar provide. The requesters are considered as invitees.

Synchronizing past reservations

The Workplace Calendar Synchronization enables you to also synchronize reservations made in the past. You can specify the date and time range in the **Sync start date time** and **Sync end date time** fields. For the on-premises calendar, the following conditions must be met to sync past reservations:

- The calendar provider that is the Microsoft Exchange On-Premises calendar provider that you configured must be active.
- The **Synchronize past reservations** field must be selected.
- The reservable sync configuration for which you want to sync past reservations must be active.

Note: Ensure that the reservations that you want to sync from the past are not above 1000. If in cases the expected number of past events are more than 1000, it is recommended to modify the system property *sn_wsd_rsvsync.ewsPastSyncPeriodInMonths*. Specify the value in months keeping in mind the expected past reservations. A single sync syncs reservations from those many months. Ensure that the specified number of months do not have more than 1000 reservations per room/resource.

'No request' handling

No request is a mechanism to validate the generated syntax of the payload of an event created for the calendar. But, instead of sending the event to the calendar provider, it is only created. The admin can validate the payload content of the event (JSON) to ensure that is generated as expected. 'No request' ensures that the application does not make any API calls to the calendar provider when you create, update, or cancel a reservation in the Workplace Reservation Management application.

Create a normal mode connection for Microsoft Exchange On-Premises

Configure a normal mode connection between the Microsoft Exchange On-Premises and ServiceNow.

Connect Microsoft Exchange On-Premises MID server with ServiceNow®

Configure connection between the MID server of Microsoft Exchange On-Premises and ServiceNow® to synchronize reservations.

Before you begin
Ensure the following:

- Install Microsoft Exchange Server Spoke.
- Set up the Microsoft Exchange Server spoke

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- You must have the Microsoft Exchange Server login credentials.
- A user is configured in the ServiceNow® instance with the role mid_server.

Role required: admin

Procedure

1. Download the MID server from your ServiceNow® instance on the system where the Microsoft Exchange Server is hosted.
   a. Navigate to **All** > **MID Server** > **Downloads**.
   b. Select and download the suitable MID server.
2. Go to your system's **Downloads** folder and unzip the file.
3. Open > **agent** > **config.xml**.
4. In the config.xml file, do the following:
   a. Specify your ServiceNow® instance details in `<parameter name="url" value="https://YOUR_INSTANCE.service-now.com/"/>`.
   b. Enter the credentials of the user with the mid_server role in `<parameter name="mid.instance.username" value="YOUR_INSTANCE_USER_NAME_HERE"/>` and `<parameter secure="true" name="mid.instance.password" value="YOUR_INSTANCE_PASSWORD_HERE"/>`.
   Enter the credentials of the user with the mid_server role.
   c. Enter a unique name in `<parameter name="name" value="YOUR_MIDSERVER_NAME_GOES_HERE"/>`.
   d. Save the file.
5. After performing the changes, start or run the MID server.
6. Open ServiceNow® instance.

   Note: Ensure that you are logged in as an admin.

7. Navigate to **All** > **MID Server** > **Servers**.
   You notice that the mid server that you configured is created.
8. Select the MID server to open.
   On the form, initially, you notice that the **Status** is set to **Down** and the **Validated** field is set to **No**.
9. To validate the server, in the Related links, select **Validate**.
   After a few seconds, the server is validated. The **Status** is set to **Up** and the **Validated** field is set to **Yes**.

Result

A platform is set to communicate with the Microsoft Exchange On-Premises MID server and ServiceNow® instance.

What to do next

Create a Connection and credential alias for Microsoft Exchange On-Premises

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Create a Connection and credential alias for Microsoft Exchange On-Premises

Establish a connection and credential alias for Microsoft Exchange On-Premises so that you can synchronize reservations. Ensure that the values for the connection and credentials alias are set as specified.

Before you begin

Connect Microsoft Exchange On-Premises MID server with ServiceNow

Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credentials Aliases**.
2. Select **Exchange_https**.
3. On the form, create a connection.

   a. In the **Connections** related list, select **New**.

   b. On the form, enter the following details:
   - **Name**: Enter a name for the connection.
   - **Credentials**: Create a credential.
     i. Select the **Lookup using list** icon.
     ii. On the Credentials window that opens, select **New**.
     iii. In the **What type credentials would like to create?** section, select **Basic Auth Credentials**.
     iv. Enter a **Name**.
     v. Enter your **username** and **password**.
     vi. Select **Submit**.
   - In the **Connection alias** field, enter `sn_exchange_spoke.Exchange_https`.
   - In the **Connection URL** field, enter the URL in the `<hostname>.<domain>.com/EWS/Exchange.asmx` format. Enter the respective host and a fully qualified domain where the Microsoft Exchange Server is installed. For example, `https://exchange2016.newlab.service-now.com/EWS/Exchange.asmx`.
   - Select the **Use MID server** check box.

     An **Advanced MID Server Configuration** tab opens.
   - In the **Advanced MID Server Configuration** tab, do the following:
     - In the **MID Selection** field, select **Specific MID Server**.
     - In the **MID Server** field, select your server from the lookup list.
   - Select **Submit**.

Result

The Connection and Credentials alias is created.

What to do next

Configure Microsoft Exchange On-Premises as calendar provider

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Configure Microsoft Exchange On-Premises as calendar provider

Set Microsoft Exchange On-Premises as calendar provider to sync reservations. Specify the calendar processor, the sync-related settings, and strict mode preference.

Before you begin

Note: For calendars to synchronize successfully, you must have an email address that matches that of the provider.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configurations** > **Calendar Providers**.
2. Select **New**.
3. On the form fill in the fields.

Calendar Providers form

Field	Description
Name	Enter the name of the provider. For example: On Premises
Description	Enter a short description.
Active	Option to activate the On-premises calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Microsoft EWS** as the processor in **Provider Configuration**.
Override alias?	Option to enable selection of your own connection and credential alias in **Provider Configuration**. If the option is not enabled, the default connection and credential alias is used.
Connection & credential alias	Fro **Provider Configuration**, select the connection and credential alias that you created on your own for the calendar provider. This option appears only if you have selected the **Override alias?** option. If an alias is not specified, then the default connection and credential alias is used.
Page size	Page size of the calendar items. You can set the page size from 1 to 500.
Sync batch size	Size of batches during a synchronization. This field is automatically set to **500**, which means a sync batch handles 500 items at a time. If there are more than 500 items, the rest is displayed in the next sync batch.
Sync batch interval	Time interval between sync batches. This field is automatically set to **60** seconds.

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Field	Description
Synchronize attendees	Enable this option to synchronize attendees as well while synchronizing reservations.
Sync start date time	The start date and time of the synchronization. The sync generates information from this date. **Important:** The past sync duration must not exceed 1825 days.
Sync end date time	End date and time of the synchronization. The sync generates information until this date. The recommended setting is at least 5 years from the **Sync start date time**. **Important:** The past sync duration must not exceed 1825 days.
Sync past reservations	Select the option to synchronize all the past reservations from the specified **Sync start date time** to the **Sync end date time**. **Note:** Ensure that the reservations that you want to sync from the past are not above 1000 per room. If in cases the expected number of past events are more than 1000, it is recommended to modify the system property *sn_wsd_rsvsync.ewsPastSyncPeriodInMonth*. Specify the value in months keeping in mind the expected past reservations. A single sync syncs reservations from those many months. Ensure that the specified number of months do not have more than 1000 reservations per room.
Delegated user email	Delegated user email address that is used to create reservations and to receive updates on room calendars as notifications. **Note:** If multiple delegated users manage multiple rooms, a separate calendar provider record must be created for each user to manage their respective rooms. This requires retrieving individual tokens for each user, creating separate connections and credential aliases, and mapping them to the respective calendar provider.

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Note: The Strict mode field is deprecated and the user must set the Exchange Online Sync Integration Mode property to Strict, Personal, or Normal mode. Additionally, the strict mode email has been updated to Delegated user email.

4. Select **Submit**.
   The On-premises calendar provider is created.
5. In the Reservable Sync Configurations related list, add the reservable sync configurations with which you want to synchronize reservations.
   To add a new one, refer to Add multiple Reservable Sync Configurations.

What to do next

- Set the scheduled job, *WSDRS Sync Calendar items* to **True**. The scheduled job is set to **False** by default and it must be enabled to start synchronizing. You can set the scheduled job time as you want. At any time, you can also manually execute it.
- Add multiple Reservable Sync Configurations

Create a strict mode connection for Microsoft Exchange On-Premises

Configure a strict mode connection between the Microsoft Exchange On-Premises and ServiceNow. Specify your strict mode setting and email address.

Connect Microsoft Exchange On-Premises MID server with ServiceNow®

Configure connection between the MID server of Microsoft Exchange On-Premises and ServiceNow® to synchronize reservations.

Before you begin

Ensure the following:

- Install Microsoft Exchange Server Spoke.
- Set up the Microsoft Exchange Server spoke
- You must have the Microsoft Exchange Server login credentials.
- A user is configured in the ServiceNow® instance with the role mid_server.

Role required: admin

Procedure

1. Download the MID server from your ServiceNow® instance on the system where the Microsoft Exchange Server is hosted.
   a. Navigate to **All** > **MID Server** > **Downloads**.
   b. Select and download the suitable MID server.
2. Go to your system's **Downloads** folder and unzip the file.
3. Open > **agent** > **config.xml**.
4. In the config.xml file, do the following:
   a. Specify your ServiceNow® instance details in `<parameter name="url" value="https://YOUR_INSTANCE.service-now.com/"/>`.
   b. Enter the credentials of the user with the mid_server role in `<parameter name="mid.instance.username" value="YOUR_INSTANCE_USER_NAME_HERE"/>` and `<parameter`

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`secure="true" name="mid.instance.password" value="YOUR_INSTANCE_PASSWORD_HERE"/>`.
Enter the credentials of the user with the mid_server role.

c. Enter a unique name in `<parameter name="name" value="YOUR_MIDSERVER_NAME_GOES_HERE"/>`.

d. Save the file.

5. After performing the changes, start or run the MID server.
6. Open ServiceNow® instance.

Note: Ensure that you are logged in as an admin.

7. Navigate to **All** > **MID Server** > **Servers**.
   You notice that the mid server that you configured is created.
8. Select the MID server to open.
   On the form, initially, you notice that the **Status** is set to **Down** and the **Validated** field is set to **No**.
9. To validate the server, in the Related links, select **Validate**.
   After a few seconds, the server is validated. The **Status** is set to **Up** and the **Validated** field is set to **Yes**.

Result

A platform is set to communicate with the Microsoft Exchange On-Premises MID server and ServiceNow® instance.

What to do next

Create a strict mode Connection and credential alias for Microsoft Exchange On-Premises

Create a strict mode Connection and credential alias for Microsoft Exchange On-Premises

Establish a strict mode connection and credential alias for Microsoft Exchange On-Premises so that you can synchronize reservations. Ensure that the values for the connection and credentials alias are set as specified.

Before you begin

Connect Microsoft Exchange On-Premises MID server with ServiceNow

Role required: admin

Procedure

1. Navigate to **All** > **Connections & Credentials** > **Connections & Credentials Aliases**.
2. Select **Exchange_https**.
3. On the form, create a connection.

a. In the **Connections** related list, select **New**.

b. On the form, enter the following details:

- **Name**: Enter a name for the connection.
- **Credentials**: Create a credential.

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i. Select the **Lookup using list** icon.

ii. On the Credentials window that opens, select **New**.

iii. In the **What type credentials would like to create?** section, select **Basic Auth Credentials**.

iv. Enter a **Name**.

v. Enter your **username** and **password**.

vi. Select **Submit**.

- In the **Connection alias** field, enter `sn_exchange_spoke.Exchange_https`.
- In the **Connection URL** field, enter `https://exchange2016.newlab.service-now.com/EWS/Exchange.asmx`.
- Select the **Use MID server** check box.

  An **Advanced MID Server Configuration** tab opens.
- In the **Advanced MID Server Configuration** tab, do the following:
  - In the **MID Selection** field, select **Specific MID Server**.
  - In the **MID Server** field, select your server from the lookup list.
- Select **Submit**.

Result
The Connection and Credentials alias is created.

What to do next
Configure Microsoft Exchange On-Premises as calendar provider in strict mode

Configure Microsoft Exchange On-Premises as calendar provider in strict mode

Configure Microsoft Exchange On-Premises as calendar provider in strict mode to sync reservations. Specify your strict mode setting and the strict mode email address.

Before you begin
Create a strict mode Connection and credential alias for Microsoft Exchange On-Premises

Note: For calendars to synchronize successfully, you must have an email address that matches that of the provider.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configurations** > **Calendar Providers**.
2. Select **New**.
3. Fill in the form fields.

Calendar Providers form

Field	Description
Name	Enter the name of the provider. For example: On Premises
Description	Enter a short description.

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Field	Description
Active	Option to activate the On-premises calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Microsoft EWS** as the processor in **Provider Configuration**.
Override alias?	Option to enable selection of your own connection and credential alias in **Provider Configuration**. If the option is not enabled, then the default connection and credential alias is used.
Connection & credential alias	Select the connection and credential alias that you created on your own for the calendar provider in **Provider Configuration**. This option appears only if you have selected the **Override alias?** option. If an alias is not specified, the default connection and credential alias is used.
Page size	Page size of the calendar items. You can set the page size from 1 to 500 in **Provider Configuration**.
Sync batch size	Size of batches during a synchronization. This field is automatically set to **500**, which means a sync batch handles 500 items at a time. If there are more than 500 items, the rest is displayed in the next sync batch.
Sync batch interval	Time interval between sync batches. This field is automatically set to **60** seconds.
Synchronize attendees	Enable this option to synchronize attendees as well while synchronizing reservations.
Sync start date time	The start date and time of the synchronization. The sync generates information from this date. **Important:** The past sync duration must not exceed 1825 days.
Sync end date time	End date and time of the synchronization. The sync generates information until this date. The recommended setting is at least 5 years from the **Sync start date time**. **Important:** The past sync duration must not exceed 1825 days.
Delegated user email	Delegated user email address that is used to create reservations and to receive updates on room calendars as notifications.

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Field	Description
	Note: If multiple delegated users manage multiple rooms, a separate calendar provider record must be created for each user to manage their respective rooms. This requires retrieving individual tokens for each user, creating separate connections and credential aliases, and mapping them to the respective calendar provider.
Sync past reservations	Select the option to synchronize all the past reservations from the specified **Sync start date time** to **Sync end date time**. **Note:** Ensure that the reservations that you want to sync from the past are not above 1000 per room. If in cases the expected number of past events are more than 1000, it is recommended to modify the system property *sn_wsd_rsvsync.ewsPastSyncPeriodInMonth*. Specify the value in months keeping in mind the expected past reservations. A single sync syncs reservations from those many months. Ensure that the specified number of months do not have more than 1000 reservations.

Note: The Strict mode field is deprecated and the user must set the Exchange Online Sync Integration Mode property to Strict, Personal, or Normal mode. Additionally, the strict mode email has been updated to Delegated user email.

4. Select **Submit**.
   The On-premises calendar provider is created.
5. In the Reservable Sync Configurations related list, add the reservable sync configurations with which you want to synchronize reservations.
   To add a new one, refer to Add multiple Reservable Sync Configurations.

What to do next

- Set the scheduled job, *WSDRS Sync Calendar items* to **True**. The scheduled job is set to **False** by default and it must be enabled to start synchronizing. You can set the scheduled job time as you want. At any time, you can also manually execute it.
- Add multiple Reservable Sync Configurations

Create single or multiple providers with Microsoft Exchange On-Premises

Configure single or multiple providers to the Microsoft Exchange On-Premises calendar provider.

Before you begin

Connect Microsoft Exchange On-Premises MID server with ServiceNow

Role required: admin

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Procedure

1. Create connection and credential aliases.
   For multiple connections, create separate connection and credential records.

   a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.

   b. Select **New**.

   c. On the form, fill in the fields.

   Connection & Credential Aliases form

Field	Description
Name	Name for the connection and credential alias.
ID	The field is automatically generated after you save the form based on the specified **Name**.
Application	Ensure that the application is set as **Microsoft Exchange Online Spoke**
Parent alias	Select **sn_exchange_spoke.Exchange_https**.

   d. Select **Submit**.
   The Connection and Credential alias record is created. As the next step, you must create a Basic Auth credential record.

2. Create a Basic Auth credential to use in the newly created connection and credential alias records.
   For multiple connections, create a separate credential record.

   a. Navigate to **All** > **Connections & Credentials** > **Credentials**.

   b. Select **New**.

   c. In the **What type credentials would like to create?** section, select **Basic Auth Credentials**.

   d. Enter a **Name**.

   e. Enter your **username** and **password**.

   f. Select **Submit**.

3. Configure connections to the connection and credential alias.

   a. Navigate to **All** > **Connections & Credentials** > **Connection & Credential aliases**.

   b. Select the connection and credential alias record that you created in the initial steps.
   Depending on how you want to add connections, select the appropriate alias record.

   c. On the form, in the **Connections** related list, select **New**.

   d. On the form, fill in the fields.

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HTTPs connection form

Field	Description
Name	Unique name to identify the record. For example, `Exchange on prem Connection`.
Credential	Select a credential record that you created. If you created multiple credentials, select the appropriate credential for this connection.
Connection alias	The connection alias is automatically filled with the connection and credential alias to which you are adding this connection.
URL builder	**Note:** Do not select the check box.
Connection URL	Connection URL. Enter `https://exchange2016.newlab.service-now.com/EWS/Exchange.asmx`.
Use MID server	Select the check box. An **Advanced MID Server Configuration** tab opens.
Active	Option to activate the connection.

e. In the **Advanced MID Server Configuration** tab, do the following:

- In the **MID Selection** field, select **Specific MID Server**.
- In the **MID Server** field, select your server from the lookup list.

f. Select **Submit**.
The connection is added to the alias. Depending on the number of connections you want to add, repeat the steps.

4. Configure calendar providers.
Create a single provider or multiple providers for on-premises. If you want to create

a. Navigate to **All** > **Workplace Calendar Synchronization** > **Configurations** > **Calendar Providers**.

b. Select **New**.

c. Fill in the form fields.

Calendar Providers form

Field	Description
Name	Enter the name of the provider. For example: On Premises

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Field	Description
Description	Enter a short description.
Active	Option to activate the On-premises calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Microsoft EWS** as the processor from **Provider Configuration**.
Override alias?	Option to enable selection of your own connection and credential alias from **Provider Configuration**. If the option is not enabled, then the default connection and credential alias is used.
Connection & credential alias	Select the connection and credential alias that you created on your own for the calendar provider from **Provider Configuration**. This option appears only if you have selected the **Override alias?** option. If an alias is not specified, then the default connection and credential alias is used.
Page size	Page size of the calendar items. You can set the page size from 1 to 500.
Sync batch size	Size of batches during a synchronization. This field is automatically set to **500**, which means a sync batch handles 500 items at a time. If there are more than 500 items, the rest is displayed in the next sync batch.
Sync batch interval	Time interval between sync batches. This field is automatically set to **60** seconds.
Synchronize attendees	Enable this option to synchronize attendees as well while synchronizing reservations.
Sync start date time	the start date and time of the synchronization. The sync generates information from this date.
Sync end date time	End date and time of the synchronization. The sync generates information until this date. The recommended setting is at least 5 years from the **Sync start date time**,
Strict mode	Select the option to enable strict mode. If you enable this option, events are not directly created in the employee's calendar, instead, they are sent to a general email address. Employees are invited to the event. They can only make changes using the Workplace Reservation Management application.
Strict mode email	Strict mode email address used to create reservations and to receive reservation-

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Field	Description
	related notifications. Employees are considered as invitees in the reservation.
Sync past reservations	Select the option to synchronize all the past reservations from the specified **Sync start date time** to the current date. **Note:** Ensure that the reservations that you want to sync from the past are not above 1000. If in cases the expected number of past events are more than 1000, it is recommended to modify the system property *sn_wsd_rsvsync.ewsPastSyncPeriodInMonth* Specify the value in months keeping in mind the expected past reservations. A single sync syncs reservations from those many months. Ensure that the specified number of months do not have more than 1000 reservations.

d. Select **Submit**.
The On-premises calendar provider is created. Repeat Step 4 to add another calendar provider.

Result
Multiple connections and providers are created.

Add multiple Reservable Sync Configurations

Add workplace items that must be synchronized with the calendar provider whenever an employee makes a reservation.

Before you begin
Refer to Explore Workplace Calendar Synchronization.

Role required: sn_wsd_rsvsync.admin

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Reservable Sync Configuration**.
2. Select **New**.
3. On the form, fill in the fields.

Reservable Sync Configuration form

Field	Description
Location	Workplace item that you want to synchronize with the calendar provider whenever an employee makes a reservation. For example, this field can be the location of a meeting room, conference room, or board room.

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Field	Description
Reservable module	The reservable module, which contains the workplace item.
Email	The email address of the workplace room/space, such as for a meeting room or conference room. The email address is used to check calendar statuses and events. **Important:** The **Email** field will not be auto-populated with the email address that is specified in the room/space configuration form. After you specify the email address and save the form, the following actions are performed: ○ If there is no email address specified on the room/space configuration form, then the **Email** field of the room/space configuration form is auto-filled with the email address that you specified here. ○ If an email address is specified on the room/space configuration form, and it does not match the email address that you specified here, an error is displayed.
Active	Option to activate the workplace item for synchronization. **Important:** The **Active** field is read-only and inactive if you are adding the reservable sync config record to the Microsoft Exchange Online or Microsoft Exchange On-Premises calendar provider. To activate the reservable sync config record, you must select the **Activate** option after you save the form.
Provider	Calendar provider that you want to synchronize with the workplace item from **Provider Configuration**.
No request	Option to test synchronization from **Provider Configuration**. Select this option to test if a reservation is synchronized or not when the workplace item is active. Validate the configuration and events to ensure that everything is set up correctly. Selecting this option will only generate events and not send them to the calendar service.

4. Select **Submit**.

Result
The workplace item is added.

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Important: If you are adding the reservable sync config record to the Microsoft Exchange Online calendar provider, the reservable sync config record will be de-activate after creation. To activate the reservable sync record, you must select the **Activate** option on that reservable sync config record form.

Note: When a Reservable Sync configuration is changed or updated, the synchronization deltas (Sync delta) are cleared from the application.

Activate or deactivate a Reservable sync configuration

You can activate or deactivate a reservable sync configuration if it is not required at any time.

Before you begin

Note: You can activate or deactivate a reservable sync configuration for the Microsoft Exchange calendar provider only.

Role required: admin

About this task

When you configure a reservable sync config record for Microsoft Exchange Online and Microsoft Exchange On-Premises calendar provider, it is deactivated by default. In order to activate it, you must manually activate it using the **Activate** action.

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select the Microsoft Exchange calendar provider to which the reservable sync configuration is added.

   Note: If the calendar provider is already deactivated, you cannot activate or deactivate any reservable sync configuration related to it.

3. On the Provider form, scroll down to the Reservable sync configuration related list.
4. In the related list, to activate or to deactivate the reservable sync configuration, do any one of the following:
   - From the related list, select the reservable sync configurations that you want to activate or deactivate. After selection, do the following:
     a. Select **Action on selected rows...**
     b. From the drop-down, select any one of the following options:
        - Activate
        - Deactivate
   - Open the reservation sync configuration that you want to activate or deactivate and on the form, select **Activate** or **Deactivate**.

     Note: The appearance of the above options depends on the **Active** status of the reservation sync configuration.

Result

The selected reservation sync configurations is activated or deactivated.

No request handling

Make a 'No request' call to test the configuration with the calendar provider.

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Before you begin
Role required: admin

About this task
No request is a mechanism to validate the generated syntax of the payload of an event created for the calendar. But, instead of sending the event to the calendar provider, it is only created. The admin can validate the payload content of the event (JSON) to ensure that is generated as expected. 'No request' ensures that the application does not make any API calls to the calendar provider when you create, update, or cancel a reservation in the Workplace Reservation Management application.

Procedure
1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Reservable Sync Configuration**.
2. Select the reservable sync record for which you want to enable 'No request.
3. On the form, ensure that the **Active** option is enabled.
4. Enable the **No request** option.
5. Select **Update**.

Synchronize past reservations

Sync reservations made in the past, that is, before configuring the reservation synchronization setup.

Before you begin
Ensure that the calendar provider is active.

Note: In case of Microsoft Exchange On-Premises, ensure that the reservations that you want to sync from the past are not above 1000 per room/resource. If in cases the expected number of past events are more than 1000, it is recommended to modify the system property *sn_wsd_rsvsync.ewsPastSyncPeriodInMonths*. Specify the value in months keeping in mind the expected past reservations. A single sync syncs reservations from those many months. Ensure that the specified number of months do not have more than 1000 reservations per room/resource.

Role required: admin

Procedure
1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select the calendar provider for which you want to synchronize past reservations.
3. On the Provider form, ensure that the **Active** option is enabled.
4. Enable the **Sync past reservations** field.
5. In the **Sync start time**, specify the start time from the past from when you want to synchronize reservations.

   Note: For Microsoft Exchange Online calendar provider, specify the **Sync start time** manually from the subscription record of the reservable sync record for which you are synchronizing the past reservations.

6. In the **Sync end time**, specify the end time from the past until when you want to synchronize reservations.

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Important: The past sync duration must not exceed 1825 days.

7. Select **Update**.

Result
The past reservations are synchronized.

Retrieve reservations

Retrieves all the events for the active **Reservable Sync Configurations** from Microsoft Outlook to Workplace Service Delivery.

Before you begin
Role required: sn_wsd_rsvsync admin

Procedure
1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Calendar Providers**.
2. Select the calendar provider for which you want to **Retrieve reservations**.
3. On the Provider form, click **Retrieve reservations**.

   Note: The **sync start date time** is the current time and the **sync end date time** is the time taken to complete the synchronization.

4. Select **Confirm**.
   On demand sync execution record for active **Reservable sync configurations** is generated.

   Note: **On demand sync execution** record is generated at provider level. You can click the active resource separately to generate an on demand sync record.

5. Click the **On demand sync executions** record.
   It displays all the resources to be synced.
6. Click **Sync execution for reservable sync configuration**, and check whether the **State** is turned to **Success**.

Result
There is another table called Sync execution for **Reservable sync configuration spoke events** where all the events for the active **Reservable sync config** are displayed.

Export reservations to the calendar provider

As a one time procedure, export all your confirmed reservations to your calendar provider for synchronization.

Before you begin
You must have the Workplace Reservation Management application installed.

Role required: admin

About this task
If you have installed Workplace Calendar Synchronization after using Workplace Reservation Management for a long time, run the export scheduled job to export all your confirmed present and future reservations to your calendar provider. During the export, for every 45 seconds, the scheduled job exports 10 reservations to the calendar.

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The export runs based on the following conditions:

- The reservations made on the past date are not exported. Only the reservations that are on the current date and future dates are exported.
- Only the reservations that are in confirmed state are exported.
- Only the reservations made on spaces and rooms that have Reservable sync configuration are exported. For more information on how to add a Reservable sync configuration for a room or a space, refer to Add multiple Reservable Sync Configurations.

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Configuration** > **Scheduled jobs**.
2. Select **Export reservations to calendar** scheduled job.
3. Select the **Active** field to activate the scheduled job.
4. Click **Update**.
   The export process is initiated.

Result

The export process runs in the background. For every 45 seconds, 10 reservations are exported to the calendar.

Note: The application will not send any notification when the export process is complete and if any reservation is not exported.

Manage calendar synchronizations

As an admin, monitor the number of events and calendar items in the Workplace Calendar Synchronization application whenever a reservation is synchronized.

As an admin, the application enables you to view and manage the following:

- Approvals
- Events
- Calendar items
- Synchronization deltas

When you configure synchronization, you must keep in mind a few important conditions. Refer to Synchronization - Prerequisites and implementation.

Approvals

If there are any reservations created from the calendar provider application that requires approval, you can approve them using the Workplace Core approval configuration. For more information on how to approve a reservation or create a performer criteria, refer to Create a workplace performer criteria.

Events

Every action during a reservation synchronization triggers an event. These actions include creating, updating, or canceling a reservation. The Workplace Calendar Synchronization handles these events and sends notifications to the calendar services. For more information about an event and the type of events created in the application, refer to Events in Workplace Calendar Synchronization.

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- An event can create one or more calendar items.
- An event contains a request and a response to the request.
- To ensure that multiple calendar services can communicate with Workplace Reservation Management, events translate the reservations and messages from the calendar provider into standardized actions in Workplace Reservation Management.

When a workplace item is synchronized with the calendar service, an event is created to get the latest details. The response from the calendar service also creates an event. Similarly, events are created whenever a reservation is created or updated within Workplace Reservation Management for workplace items that are configured to synchronize. You can convert an event into JSON format. You can also reprocess an event if there was an error or for any reason.

Calendar items

Every action performed by the calendar service is converted to a calendar item that is handled in the Workplace Reservation Management application. A calendar item is either a new reservation or a reservation update. Using calendar items, you can also create, update, or cancel a reservation in the Workplace Reservation Management application. You can convert a calendar item into JSON format.

Synchronization deltas

When a workplace item is synchronized, a delta key is generated. A delta key is used and updated every time a workplace item synchronizes with the calendar service. Each sync delta contains a token that indicates how much information was synced last time so that a delta with the new changes can be returned in the next request instead of the complete calendar history. You can know the details of the workplace item such as the number of reservations created, or any changes made on the reservation. The delta key ensures that only the changes that occurred between the previous and the current synchronization is retrieved. The delta key retrieves details of any new, updated, and canceled reservations on the workplace item.

Note: Synchronization deltas are used only for Microsoft Exchange On-Premises and Google Calendar.

View synchronization details

Check the number of the events and calendar items that are created during a synchronization.

Before you begin
Role required: sn_wsd_rsvsync.admin

Procedure

1. Navigate to **All** > **Workplace Calendar Synchronization** > **Synchronization**.
2. Select any of the following options to view the synchronization details:
   - **Calendar Items**: Option to view calendar items that are created after a reservation synchronization.
   - **Events**: Option to view events that are created by actions taken on a reservation.
   - **Sync Deltas**: Option to view synchronization deltas of workplace items that are synchronized.

Events in Workplace Calendar Synchronization

For every reservation-related action, an event is created in Workplace Calendar Synchronization

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About Events

When a synchronization is performed, the Workplace Calendar Synchronization application creates an entry for every new reservation, creation, reservation update, and reservation cancellation. To view events, navigate to **All** > **Workplace Calendar Synchronization** > **Synchronization** > **Events**.

The following events are created:

- **Create**: A **Create** event is created whenever a reservation is created in the Workplace Reservation Management Reservation portal.
- **Update**: An **Update** event is created whenever there's an update to the reservation created in the Workplace Reservation Management Reservation portal or when a reservation is checked out
- **Delete**: A **Delete** event is created whenever there is a reservation cancellation or a No show.
- **Read**: A **Read** event is created when the Workplace Reservation Management application intends to read the reservations created on the rooms calendar in the calendar provider. The **Read** event is created only for Google Calendar and Microsoft Exchange On-Premises calendar providers.
- **Retrieve attendees**: The **Retrieve attendees** event is created for Microsoft Exchange On-Premises calendar provider to retrieve details related to attendees included in a reservation. The **Read** event does not return attendee details for Microsoft Exchange On-Premises calendar provider.

Event details

When an event is created, it is set to New state by default. Depending on the processing, the state changes to Processing, Processed or Error.

When an event is created, the event details on an Event form are displayed as follows:

- In the Request related list:
  - **Payload**: The **Payload** field contains the details of the reservation in a string format. It contains reservation-related details such as it create, update, or cancel. The format of the payload is set based on the Reservation portal form.
  - **Provider payload**: The **Provider payload** contains the same details displayed in the **Payload** field but in the format of the calendar provider's reservation form. That is, in the format in which the calendar provider reads.
- In the Response related list, the **Response** field displays the response to the event from the calendar provider in a string format.
  - The response is displayed only when an event is processed. That is, when an event is set to Processed or Error.
  - When an event returns an error, you can view the error-related details in the **Response** field
- On the form, you can view details such as:
  - The reservation for which the event is created.
  - Location of the event.
  - State and substate of the event.
  - For what action the event is created.
  - The provider for which the event is created.
  - The error details if an event results in an error.

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- You can also change the **Payload**, **Provider Payload** and **Response** format from string format to JSON format using the **Format JSON** option. The **Format JSON** helps with the readability of these fields.
- If an event fails, you can also manually reprocess the event using the **Re-process** option.

Synchronization - Prerequisites and implementation

When you connect to your calendar provider for synchronization, you may incur a few connection or synchronization-related issues.

Synchronization prerequisites

When you synchronize reservations, it is important to know the following:

- You can't edit a reservation that is created using the calendar provider in the Workplace Reservation Management application.
- During reservation synchronization, only the notes added to the reservation using the Workplace Reservation Management application is considered. That is, if the body of the reservation is updated in Microsoft Exchange, those updates are not synchronized back to Workplace Reservation Management.
- When you create, update or delete a reservation, it's performed directly on the employee's calendar. During synchronization, the events are read from the resource calendar, that is, the room calendar.
- If an event is rejected or declined by the calendar provider resource, in such case the reservation remains in the Awaiting confirmation state. For the same reason, a scheduled job **Clean-up Awaiting/Rejected Reservations** is available that you can run on any suitable frequency to clear the reservations that are rejected or declined
- For Microsoft Exchange Online, after synchronization, ensure that the meeting subject is unchanged. If the meeting subject is changed, use Microsoft PowerShell to make changes. For more information, refer to https://learn.microsoft.com/en-us/exchange/troubleshoot/client-connectivity/calendar-shows-organizer-name .

Synchronization implementation

Rooms and spaces

While performing reservation synchronization, you can synchronize both rooms and spaces.

Invitees

Invitees of a reservation can be synchronized in both the ways, that is, from Workplace Reservation Management to the calendar provider or vice versa.

- If the reserved room has reservation synchronization enabled, then the details of the reservation are sent to the invitees from their calendar provider such as Google or Microsoft Exchange.
- When synchronizing a reservation with invitees, the application performs the following:

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- The application checks if the invitees are known users, or visitors and categorizes in the reservation accordingly.
- If an invitee isn't a known user or a visitor, then they are categorized as "External" in the reservation. The details of these invitees aren't displayed on the Reservation summary.
- The invitees receive a notification when a reservation is changed or updated in the Workplace Reservation Management application. However, a notification is not received if the reservation is created or updated in the calendar provider.

Notes

If a note is added in a reservation created in the Workplace Reservation Management application, it is saved on the reservation record. An employee can update a note when required. The reservation summary page displays the summary of the meeting note. When this reservation (with notes) is synchronized, then the following actions are performed in the calendar provider:

- The notes are added to the body of the meeting email.
- If there are any notes added to the reservation from the calendar provider, it is overwritten with the notes added using the Workplace Reservation Management application when there is a reservation update.
- During reservation synchronization, only the notes added to the reservation using the Workplace Reservation Management application is considered. That is, if the body of the reservation is updated in Microsoft Exchange, those updates are not synchronized back to Workplace Reservation Management.

Privacy

If an employee reserves a room using their calendar provider, then the privacy of the reservation depends on the privacy setup made on the building to which the space or room belongs. The privacy of such reservations can be changed or overridden using Workplace Reservation Management or Workplace Service Delivery for Mobile.

Virtual meeting link

If a reservation is created in Microsoft Exchange using Zoom or Microsoft Teams, during synchronization, the meeting link is retrieved and added to the reservation record in Workplace Reservation Management as a virtual meeting link. However, it is dependant on whether the virtual meeting provider is configured in Workplace Reservation Management or not. If it is not configured, then the meeting link is not included.

When a Workplace Reservation Management reservation includes a virtual meeting link, then the meeting links appear as follows when it's synchronized with the Microsoft Exchange calendar of the attendees:

- **Zoom**: If a Zoom meeting link is added, the link appears in the **Location** field of the email containing the meeting invite.
- **Microsoft Teams**: If a Microsoft Teams link is added, the meeting link and the joining-related details are added to the body of the calendar event. Similarly, when a reservation is created in the Microsoft Exchange calendar using the **Teams meeting** toggle button, the meeting link is retrieved and saved as a virtual meeting link on the reservation record in Workplace Reservation Management application.

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Note: As the meeting link appears in the body of the email, in any case, if you want to update or change the meeting details, you must do it only using the Workplace Reservation Management. Because when a reservation synchronization is performed, the details (in this case, the meeting link and details) are synchronized only in one way, that is, from Workplace Reservation Management to the calendar provider (in this case Microsoft Teams). If you already change the meeting details or the notes from the calendar provider, it is overwritten by Workplace Reservation Management when a synchronization is performed.

- **Any other virtual meeting providers**: The meeting link is added in the **Location** field of the email containing the meeting invite.

To set up Microsoft Teams, refer to Connect Workplace Reservation Management with Microsoft Teams.

To set up Zoom, refer to Connect Workplace Reservation Management with Zoom.

Debugging, handling throttling and other

Debug *Workplace Service Delivery* **to** *Microsoft Exchange Online*:

Note: Ensure that Developer Trace is to be enabled for debugging.

1. Check for events in **Workplace Calendar Synchronization** > **Synchronization** > **Events** > **.**
2. Ensure that all the events are processed successfully and their Response has “Event ID” & “Icaluid”.
3. If an event fails with “Too many requests” error, enable **WSDR Reprocess Events** scheduled job with a 5-minute frequency.
4. For an exact response message from “Rest”, navigate to **Flow Designer** > **Executions**. Apply the filter by the name “Create Calendar Event”.
5. For any other external error above the 400 error code, validate the setup on the Azure Portal according to the error code. Following are the most common errors:
   - Access to oData is inactive
   - Invalid Object
6. To fix these errors, the resource or the user must be in the scope of tenant Id(Client Id)

Debug *Microsoft Exchange Online* **to** *Workplace Service Delivery*

1. Make sure that the **Create and Update Reservations from Events** scheduled job is active.
2. Verify that there is an event entry in **Microsoft Exchange Online Spoke** > **Events**.
3. If there is no entry, validate. Navigate to **Workplace Calendar Synchronization** > **Configuration** > **Reservable Sync Configuration** > **.**.
4. Verify if the room email is active.
5. Check if the subscription field is populated and verify if that subscription status is active and the status is 200.
6. If the subscription is not populated, deactivate and activate the individual reservable sync configuration record.

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7. If the subscription is still not populated, then navigate to **Flow designer** > **Executions** > **Create or Update Subscription** and validate the flow.
8. If there is an issue with the resource, you may see errors like resource not found, invalid Resource, the SMTP address has no mailbox associated with it or others. The error might have occurred for the below reasons:
   - Invalid email ID
   - Must have proper resource mail box in office.com
   - Resource/User must be in scope of tenant Id(Client Id)
9. For more information on the errors, check https://learn.microsoft.com/en-us/graph/errors and fix the root cause.

Throttling issue (HTTP Error 429) in *Microsoft Exchange Online* while processing huge reservations:

If you are processing huge reservation requests at a time, there might be a throttling on Microsoft Exchange, that is, you might incur HTTP Error 429. In such cases, it is recommended that you configure the Retry policies in the Integration Hub application. Perform the following actions to configure:

1. Go to **IntegrationHub** > **Retry Policies**.
2. Select **MS Exchange Online HTTP Retry Policy**.
3. In the **Retry Strategy** field, select **Honor "Retry-After" Header**.
4. In the **Max Elapsed Time (seconds)**, set the value to 120.

Tip: Set the value to 120 or above.

Run Instance scan to check Microsoft Exchange Online synchronization configuration

Execute an Instance scan on your ph keyref="var.workplace-calendar-sync"/> configuration with Microsoft Exchange Online. The Instance Scan application diagnoses the configurations with the calendar provider by running a series of checks using suites.

Before you begin

Role required: sn_wsd_rsvsync.admin

About this task

Run the instance scan using the Instance Scan application to check if there are any incorrect configurations while configuring the Microsoft Exchange Online calendar provider. The scan runs and notifies about any incorrectness.

The ph keyref="var.workplace-calendar-sync"/> application provides you the *Workplace Calendar Synchronization Configurations* suite in the Instance Scan application. For more information about Instance scan, refer to Instance Scan. You can run the suite at any time to diagnose the configurations. The suite runs the following configuration checks:

- **Reservable Sync Configurations Check**: Checks if the reservation sync configurations are correct.
- **Calendar Sync Active Providers Check**: Checks if there are no active providers as the sync can't be configured.
- **Webhook Registry Configurations Check**: Checks for callback URL and the client state in the webhook registry.
- **Calendar Provider Configurations Check**: Checks if the active calendar provider configurations are correct.

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Procedure

1. Navigate to **All** > **Instance Scan** > **Suites**.
2. Select **ph keyref="var.workplace-calendar-sync"/> Configurations**.
   The form opens. On the form, view the above checks in the Checks Related list.
3. To run the scan, select **Execute Suite Scan**.
4. In the Scan Suites Now window, select **Full instance**.
5. Select **Execute Scan**.
   The scan executes and you can view the progress.
6. On the Execute Suite Scan progress window, select **Go to Result** to view the scan results.
7. On the Scan Result form, review the findings in the Scan Findings related list.
   In the Scan Findings related list, you can view the following information:
   - The **Check** column displays the check that diagnosed the issue.
   - The **Source Table** and **Source** column displays the source where the issue was found.

     The **Source** displays the record that caused the issue.
   - The **Finding Details** column displays the details of the finding, that is, the issue and its details. Hover on the finding to view the full details. For information about the finding messages, refer to Instance scan findings.
8. Fix the scan findings.
9. After fixing the issues listed in the Scan Findings related list, select **Rescan** on the Scan Result form.
   The scan displays the latest results with the implemented fixes.

Analytics and Reporting Solutions for Workplace Calendar Synchronization

Monitor the status of reservation synchronizations.

Synchronization Health Dashboard

Use this dashboard to track the reservation synchronization. Monitor number of events and calendar items created in the application and other details related to them.

Note: The Workplace Calendar Synchronization dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central. Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

For more information about the migrated dashboard, see Reservation Management dashboard.

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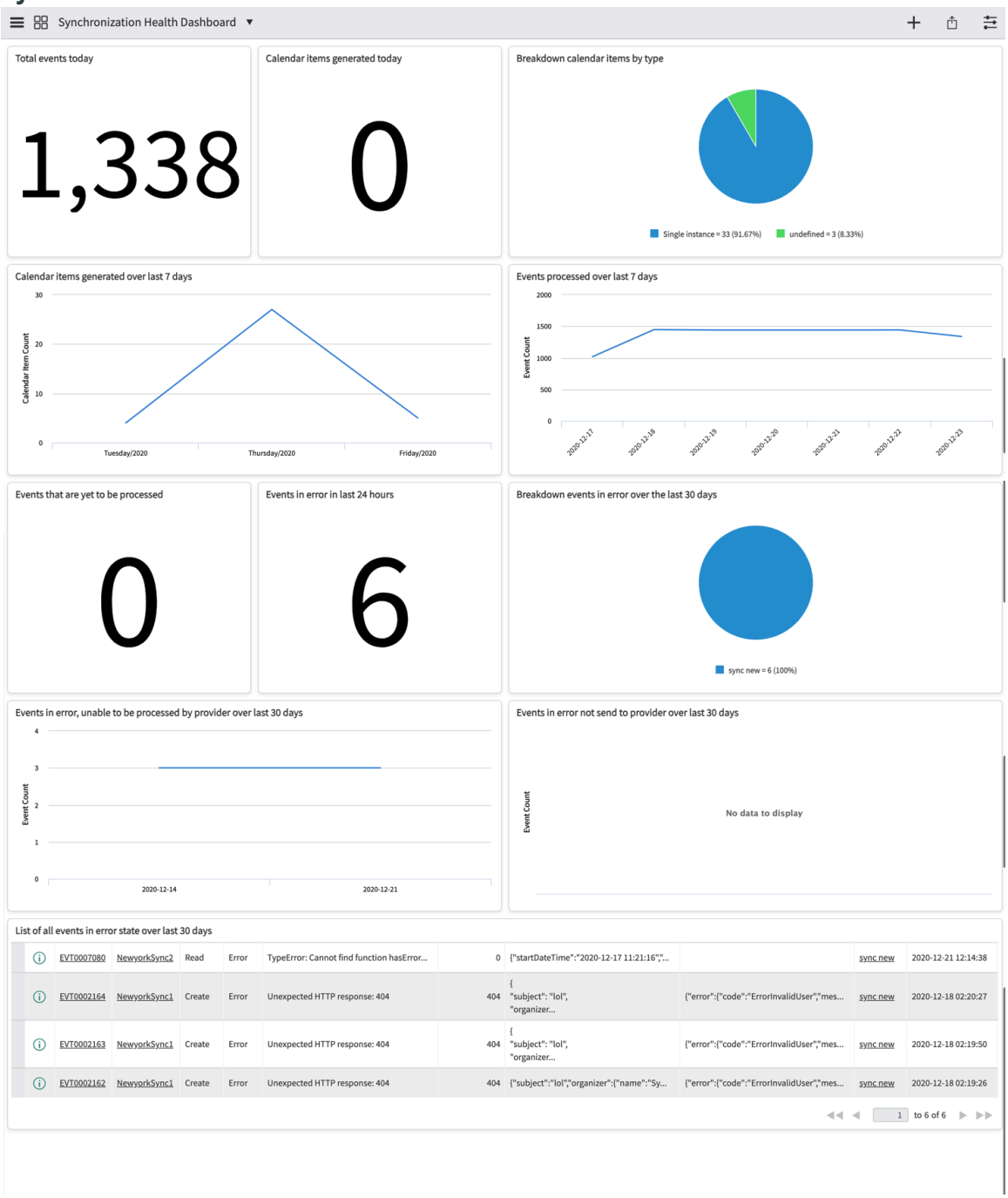
Synchronization health dashboard



To access the Synchronization health dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards** .

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End user and roles

End user goal and role

End user and goal	Required role	Benefits
System administrator and Workplace Calendar Synchronization admin: Needs visibility into the real-time status of the events and calendar items created in the application.	sn_wsd_rsvsync.admin	• View Connection configuration. • View Calendar providers. • Create, manage, and edit a Reservable Sync Configuration.

Data visualizations

Data visualization types

Title	Type	Description
Total events today	Single score	Number of events created on the current day.
Calendar items generated today	Single score	Number of calendar items generated in the current day.
Breakdown calendar items by type	Pie breakdown	Breakdown of the calendar items based on their type
Calendar items generated over last 7 days	Step time series	Number of calendar items generated in the last 7 days.
Events processed over last 7 days	Step time series	Number of events processed in the last 7 days.
Events that are yet to be processed	Single score	Number of events that are yet to be processed.
Events in error in last 24 hours	Single score	Number of events generated with errors in the last 24 hours.
Breakdown events in error over the last 30 days	Pie breakdown	Breakdown of events generated with errors over the last 30 days.
Events in error, unable to be processed by provider over last 30 days	Step time series	Number of events generated with errors that could not be processed by provider over the last 30 days.
Events in error not sent to provider over last 30 days	Step time series	Number of events generated with errors that were not sent to the provider over the last 30 days.
List of all events in error state over last 30 days	List	List of all the events that have been in the error state over the last 30 days.

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Workplace Calendar Synchronization references

Learn more about the roles, tables, system properties, scheduled jobs and flows installed with the Workplace Calendar Synchronization application.

Components installed with Workplace Calendar Synchronization

Several types of components are installed with the Workplace Calendar Synchronization application, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed with Workplace Calendar Synchronization

Workplace Calendar Synchronization user roles

Role title [name]	Description	Contains roles
Workplace Calendar Synchronization admin [sn_wsd_rsvsync.admin]	As a system admin, you can do the following: • Access the application completely. • Create, manage, and edit a Connection configuration. • Establish OAuth credentials. • Create, manage, and edit Calendar providers. • Retrieve reservations. As a Workplace Calendar Synchronization admin, you can create, manage, and edit a Reservable Sync Configuration.	None

Tables installed with Workplace Calendar Synchronization

Workplace Calendar Synchronization tables

Table	Description
Calendar Item [sn_wsd_rsvsync_calendar_item]	Stores information about all the calendar items that are created in the application.
Synchronization Delta [sn_wsd_rsvsync_delta]	Stores information about the last successful synchronization of a workplace item. Each sync delta contains a token that indicates how much information was synced last time so that a delta with the new changes can be returned in the

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Workplace Calendar Synchronization tables (continued)

Table	Description
	next request instead of the complete calendar history. **Note:** Starting from Workplace Calendar Synchronization version 2.0.1, for Microsoft Exchange Online, only Webhook is used for an improvised approach.
Event [sn_wsd_rsvsync_event]	Store information about all the events that are created in the application. Events are created for actions such as create, read, update or delete. **Note:** If **WSD: Archive old workplace tasks** archival rule is applied then Event [sn_wsd_rsvsync_event] table is also archived. For more information, see Apply the archive rule.
Provider [sn_wsd_rsvsync_provider]	Stores information about the configuration settings that are used for synchronizing the reservations with the calendar provider.
Reservable Sync Configuration [sn_wsd_rsvsync_reservable_sync_configuration]	Stores information about all the workplace items that are configured to synchronize with a calendar service whenever a reservation is made.

Tables installed with Retrieve reservations

Retrieve reservations table components

Table	Description
Retrieve reservations [sn_wsd_rsvsync.admin]	Retrieves all the events for the active **Reservable Sync Configurations** from Microsoft Outlook to Workplace Service Delivery
On demand sync executions [sn_wsd_rsvsync.admin]	It stores the parent record of the active Reservable Sync configurations.
Execution start time	Stores the start time when retrieve reservations was executed
Execution end time	Stores the end time when retrieve reservations got ended
Type	Displays the type of records.

Properties installed with Workplace Calendar Synchronization

Customize the properties available with Workplace Calendar Synchronization.

These properties are available for Workplace Calendar Synchronization.

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Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Calendar Synchronization

Property	Description
sn_wsd_rsvsync.sync_integration_mode	This property enables you to specify the Exchange Online sync integration mode to Strict, Personal Authentication, or Normal mode to synchronize reservation between Microsoft Exchange Online and Workplace Reservation Management. • **Type**: string • **Default value**: Normal
sn_wsd_rsvsync.use_user_default_tz	This property enables you to synchronize reservations created by users according to their time zone. Either the system's time zone or the user's time zone is used to update and synchronize reservation. First, the property checks if the user has a time zone specified or not. If the user has not specified any time zone, the system's time zone is used. Again, if the system has no time zone specified, then the property uses the UTC time zone. Reservations synchronized from Microsoft Exchange and Google Calendar to Workplace Service Delivery are not affected. • Type: true/false • Default value: **false**
sn_wsd_rsvsync.create_blocking_rsv	This property enables you to create blocker reservations on workplace locations that are synchronized with the calendar provider. • Type: true/false • Default type: **true**
sn_wsd_rsvsync.max_event_retry_count	This property enables you to specify after how many times an event must be reprocessed. • Type: Integer • Default value: **10**
sn_wsd_rsvsync.use_default_tz	This property enables you to use the default time zones during the reservation synchronization.

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Properties for Workplace Calendar Synchronization (continued)

Property	Description
	• Type: true/false • Default type: **true**
sn_wsd_rsvsync.exchange_callback_time_limit	This property enables you to specify the maximum time limit to wait for Microsoft exchange to notify with a callback. Specify the time limit in negative seconds as specified in the default value. **Note:** You won't be notified when an event is rejected or declined by Microsoft Outlook. For the same reason, a scheduled job - **Clean-up Awaiting/ Rejected Reservations**, is available that you can run on any suitable frequency to clear the reservations rejected or declined by the Microsoft Outlook calendar. • Type: Integer • Default value: **-18000** (5 hours)
sn_wsd_rsvsync.outlook_event_sync_interval	This property is used internally by the application, it enables you to set the time(in minutes) to synchronize events received by Microsoft Exchange with Workplace Reservation Management application. Ensure that the time that you set in this property is more that the time specified in the **Create and Update Reservations from Events** scheduled job's repeat interval. • **Type**: Integer • **Default value**: 2
sn_wsd_rsvsync.google_event_sync_interval	This property is used internally by the application while updating the attendee details on the reservations. Ensure that the time that you set in this property is more than the time specified in the **Update attendees of Workplace Reservation (Google)** scheduled job's repeat interval. • **Type**: string • **Default value**: 5
sn_wsd_rsvsync.ewsPastSyncPeriodInMonths	This property enables you specify the number of months that you want a sync to run in order to sync past reservation. A single sync will

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Properties for Workplace Calendar Synchronization (continued)

Property	Description
	run for specified number of months for past reservation. Ensure that a single sync does not return more 1000 reservations. Specify the number of months based on the same. • **Type**: Integer • **Default value**: 2

Scheduled jobs installed with Workplace Calendar Synchronization

The Workplace Calendar Synchronization includes scheduled jobs to process a few synchronizations seamlessly.

Scheduled jobs installed with Workplace Calendar Synchronization

Scheduled job	Scope	Active	Time	Description
Clean-up Awaiting/ Rejected Reservations	Workplace Calendar Synchronization	True	Repeats every 5 hours	This scheduled job clears the reservations that have been stuck in awaiting confirmation for more than 5 hours (due to rejection from outlook)
Create and Update Reservations from Events	Workplace Calendar Synchronization	True	Repeats every 1 minute	This scheduled job inserts/ updates reservations from > **Microsoft Exchange Online spoke** > **Events** table.
Export reservations to calendar	Workplace Calendar Synchronization	False	Repeats every 15 minutes	This scheduled job is inactive by default. The scheduled job syncs existing Workplace Reservation Management reservations with the calendar. • It retrieves details of the reservations that are not synchronized

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Scheduled jobs installed with Workplace Calendar Synchronization (continued)

Scheduled job	Scope	Active	Time	Description
				with the calendar. • Creates events for all reservations based on the respective location's calendar provider. On successful creation of events, reservations are populated with "Event Id & IcalId". • If the script fails to create events for a reservation, you can check the logs to determine the reason behind the failure.
Subscription renewal failure notification job	Workplace Calendar Synchronization	True	Daily	This scheduled job checks for failed subscriptions that are linked to active reservable sync configuration records and notifies users with the rsvsync_admin role.
WSDRS Multi reservation processor	Workplace Calendar Synchronization	True	Repeats every 15 minutes	This scheduled job turns reservations that are incorrectly created as single from an external source into correctly grouped multi children

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Scheduled jobs installed with Workplace Calendar Synchronization (continued)

Scheduled job	Scope	Active	Time	Description
WSDRS Reprocess Events	Workplace Calendar Synchronization	False	Repeats every 15 minutes	This scheduled job reprocesses the synchronization calls for WSD events that failed to process.
WSDRS Sync Calendar items	Workplace Calendar Synchronization	False	Repeats every 2 minutes	This scheduled job runs only for Microsoft Exchange Online On-Premises and Google Calendar provider. This job is not applicable to Microsoft Exchange Online. This scheduled job synchronizes all the events of a calendar for all the locations that have active reservable sync configurations.
Update attendees of Workplace Reservation (Google)	Workplace Calendar Synchronization	True	Repeats every 4 minutes	This scheduled job is installed when the Google Calendar Spoke is installed. This job synchronizes attendees, who were synced from Calendar events and stored in the calendar items, to the Reservations table.
Sync attendees for onPrem	Workplace Calendar Synchronization	True	Repeats every 4 minutes	This scheduled job is installed when Microsoft Exchange Server Spoke is installed. This job synchronized attendee, who were synced from Calendar events

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Scheduled jobs installed with Workplace Calendar Synchronization (continued)

Scheduled job	Scope	Active	Time	Description
				and stored in calendar items, to the Reservations table.
Clean-up Awaiting/ Rejected Reservations (OnPrem)	Workplace Calendar Synchronization	True	Repeats every 5 hours	This scheduled job clears the reservations that have been stuck in Awaiting confirmation for more than 5 hours (due to rejection from Microsoft Exchange Online On-Premises).
Queue Webhook Events	Microsoft Exchange Online Spoke	True	Repeats every 1 minute	As Microsoft Exchange Online sends many notifications for each change, to avoid a race condition, the notifications are captured in the Webhook Notification [sn_ex_online_spke_webhook_not table and queued to the Callback Queue [sn_ex_online_spke_callback_queu table through this scheduled job.
Weekly schedule scan	Workplace Calendar Synchronization	True	Once a week	This schedule job is a scan performed after the configuration. It is a suite for checking calendar sync configuration.

Flows installed with Workplace Calendar Synchronization

Below are the flows that run on different timelines.

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Flows installed with

Flow	Scope	Active	Time	Description
Sync reservation paths from Reservable module configuration flow	Workplace Reservation Management	True	Daily	This flow checks the current Reservable module configuration of Reservation paths and synchronizes it with the Reservation path records.
Process reservations stuck in sync required	Workplace Calendar Synchronization	True	Repeats every 15 minutes	This flow triggers synchronization for reservations that have been waiting for a third party data for more than 15 minutes (for example Virtual Meeting details) before triggering a sync call to the calendar.
Renew Subscriptions	Microsoft Exchange Online Spoke	True	Daily	This flow retrieves all the subscription records and renews them if renewal is required, based on their expiration time. If a subscription is marked with status as Being deleted, then the record is deleted and is not considered for renewal.

Instance scan findings

After the instance scan completes, on the Scan Result form, review the findings in the Scan Findings related list.

Scan findings

The following findings are reported in the scan report:

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- Could not find the sn_ex_online_spke.Microsoft_Exchange_Online Connection and credential alias.
- The Connection & credential alias specified in the Override alias is not a child alias to the sn_ex_online_spke.Microsoft_Exchange_Online Connection and credential alias.
- There are multiple/no connections associated with the ' + selectedAlias.getValue('name') + ' Connection and credential alias.
- There are multiple/no connection attributes associated with ' + selectedAlias.getValue('name') + ' Connection and credential alias.
- Incorrect 'Connection URL' specified in the " + selectedAlias.getValue('name') + " Connection and credential alias."
- OAuth provider associated with the OAuth Entity Scope - ' + scope + ' is not same as the one associated with OAuth Entity Profile of this scope.
- The OAuth Scope - ' + scopesExpected[i] + ' must be associated with the grant type ' + grantType + '.
- The Default grant type of the OAuth provider must be same as the Grant type of the OAuth Entity Profile.'
- OAuth Token has expired.
- Please generate an OAuth Token.
- Invalid token URL associated with Application Registry - ' + applicationRegistryGr.getValue('name') + '.
- Invalid authorization URL associated with Application Registry - ' + applicationRegistryGr.getValue('name') + '.
- Invalid redirect URL associated with Application Registry - ' + applicationRegistryGr.getValue('name') + '.
- There is no OAuth Entity Profile associated with the credential - ' + credentialGr.getValue('name') + '.
- There is no credential associated with the connection - ' + connectionGr.getValue('name') + '.
- There is no active credential associated with the connection - ' + connectionGr.getValue('name') + '.
- Invalid Credential record associated with connection - ' + connectionGr.getValue('name') + '.
- If the grant type of the connection (linked with provider) is set as Authorization Code, the provider must have Strict mode enabled with a valid Strict mode email.
- Synchronization is not configured - could not find an active provider.
- There are multiple subscriptions associated with this resource.
- Calendar provider associated with this Rsv Sync Configuration is inactive.

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- `Could not find an email with this Rsv Sync configuration.`
- `The Rsv Sync configuration email must be same as the email specified in the 'Email' field of the location record.`
- `The same email is associated with a different Rsv sync configuration.`
- `The Subscription has expired.`
- `The Subscription status is ' + status + '.`
- `Invalid Subscription.`
- `Could not find a subscription for this Rsv Sync Configuration.`

To fix a finding, refer to the following:

- Microsoft Exchange Online - Calendar synchronization
- Synchronization - Prerequisites and implementation

Provider form

The Provider form includes calendar provider details and provider configuration field details.

Provider form

Field	Description
Name	Name of the calendar provider.
Description	Description of the calendar provider.
Active	Option to activate the calendar provider.
Calendar processor	Calendar processor for the synchronization. Select **Microsoft Graph** from the **Provider Configuration** tab.
Override alias?	Option to enable the selection of your own connection and credential alias from the **Provider Configuration** tab. If the option isn't enabled, then the default connection and credential alias are used
Connection & credential alias	Select the connection and credential alias that you created on your own for the calendar provider. This option appears only if you have selected the **Override alias?** option. If an alias isn't specified, then the default connection and credential alias are used
Sync start date time	The start date and time of the synchronization. The synchronization generates information from this date. Specify the **Sync start date time** manually from the subscription record of the reservable sync record that you're syncing the past reservations for. **Important:** The past sync duration must not exceed 1825 days.

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Provider form (continued)

Field	Description
Sync end date time	End date and time of the synchronization. The sync generates information until this date. You should set this date to at least 5 years from the **Sync start date time**. **Important:** The past sync duration must not exceed 1825 days.
Delegated user email	Delegated user email address that is used to create reservations and to receive updates on room calendars as notifications. **Note:** If multiple delegated users manage multiple rooms, a separate calendar provider record must be created for each user to manage their respective rooms. This process requires retrieving individual tokens for each user, creating separate connections and credential aliases, and mapping them to the respective calendar provider.

Third-party OAuth Provider form

The Third-party OAuth Provider form includes OAuth provider details such as the client ID and client secret for personal authentication.

Third-party OAuth Provider form

Field	Description
Name	Unique name to identify the OAuth provider. For example, Microsoft Exchange Online_personalAuth.
Client ID	Client ID created during the app creation in Microsoft Azure.
Client Secret	The password that you generated when creating the app in Microsoft Azure.
Default Grant Type	Grant type used to establish the token. Select **Authorization Code**.
Authorization URL	OAuth authorization code endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/authorize`.
Token URL	OAuth server token endpoint. Enter `https://login.microsoftonline.com/<tenant_id>/oauth2/v2.0/token >`.

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Third-party OAuth Provider form (continued)

Field	Description
Redirect URL	OAuth callback endpoint. The URL is automatically filled as `https://<instance-name>.service-now.com/oauth_redirect.do`.

Troubleshooting Workplace Calendar Synchronization

This section helps administrators troubleshoot connection setup issues in Workplace Calendar Synchronization. Calendar sync integrates ServiceNow Workplace with external calendar providers — Microsoft Exchange Online and Google Calendar — to synchronize room and resource availability.

Calendar sync establishes two types of connections that must both be correctly configured for the integration to function:

- System-to-System connection - a backend integration that syncs calendar data automatically using service account credentials.
- User-level connection - a per-user connection established when a user interacts with the application, required only in Personal mode.

Note: The troubleshooting steps in this guide apply to both Microsoft Exchange Online and Google Calendar integrations unless otherwise specified.

System-to-System Connection

The system-to-system connection handles backend synchronization between ServiceNow and your calendar provider. Follow the steps below to diagnose and resolve configuration issues.

Identify the Connection Alias

The connection alias determines which credentials and OAuth configuration are used for the integration. ServiceNow resolves the alias in the following order.

1. Navigate to the Calendar Provider record for the relevant provider (Microsoft or Google).
2. Check whether an Override Alias is configured on the provider record.
3. If an Override Alias is mapped to a Connection & Credential Alias, that alias is used for the integration.
4. If no Override Alias is mapped, ServiceNow uses the default alias for the processor — for example, the default Microsoft Exchange Online alias for the `ms_graph` processor

Validate the Connection & Credential Alias

Confirm that the alias is correctly configured before checking credentials.

- Verify that the alias is appropriate for the selected Integration Mode: Normal, Strict, or Personal.
- Confirm all of the following are configured and active on the alias:
  - **Connection**
  - **Credential**
  - **OAuth Entity Profile**

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- **Scopes**
- **Application Registry**

Note: An incomplete alias, for example, a missing OAuth Entity Profile or Application Registry will cause token generation and API calls to fail even if the credential itself is valid.

Verify Credential Settings

Navigate to the Credential record associated with the alias and confirm the following settings:

- **Integration Type** must be set to **System**.
- **Grant Type** must match the integration mode and provider as shown in the table below.

Credential settings

Provider	Integration Mode	Required Grant Type
Microsoft Exchange Online	Normal	Client Credential
Microsoft Exchange Online	Strict or Personal	Authorization Code
Google Calendar	All modes (including Normal)	Authorization Code

Important: Using a mismatched grant type is a common cause of authentication failures. For example, configuring Client Credential on an Exchange Online integration that is running in Strict mode will result in authorization errors.

Obtain an OAuth Token (Authorization Code Only)

This step applies only when the grant type is Authorization Code. If the grant type is Client Credential, skip this step.

1. Open the Credential record associated with the alias.
2. Select **Get OAuth Token**.
3. When prompted, authenticate using the credentials of a user who has read or write access to the room calendars in the external system.
4. Confirm that the token is generated successfully before proceeding.

Warning: Using incorrect credentials when clicking **Get OAuth Token** will result in errors such as `"resource not found"`,`"subscription failed"`,or `"access denied"`. Ensure the authenticating user has the required permissions before generating the token.

Configure Delegated User Email

The **Delegated User Email** field on the Calendar Provider record is required only in Strict or Personal integration modes.

- If the integration mode is Strict or Personal: populate the **Delegated User Email** field on the Provider record with the email address of the delegated service account.
- If the integration mode is Normal: leave this field empty. It is not used in Normal mode.

Note: A missing or incorrect Delegated User Email in Strict or Personal mode will cause calendar event lookups and room availability queries to fail.

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User-Level Connection

The user-level connection is established per user when they interact with the Workplace application. The configuration required depends on the integration mode.

Normal and Strict Modes

No additional user-level configuration is required. System-to-system credentials handle all calendar operations.

Personal Mode

In Personal mode, each user authenticates individually with the calendar provider. An out-of-the-box (OOB) alias is provided for each processor type (Exchange Online and Google Calendar).

- Locate the OOB alias for the relevant processor (Exchange or Google).
- Confirm that the alias is correctly configured for the processor type.
- Verify that the alias has all of the following configured and active:
  - **Connection**
  - **Credential**
  - **OAuth Entity Profile**
  - **Scopes**
  - **Application Registry**
- Confirm that the **Grant Type** on the Credential record is set to Authorization Code.
- Confirm that the **Integration Type** on the Credential record is set to Personal.

Important: Do not select **Get OAuth Token** on the Personal credential record. In Personal mode, each user's OAuth token is generated automatically via a pop-up or in-application prompt the first time they interact with the calendar feature. Manually generating the token on this credential will interfere with per-user token management.

Workplace Space Mapping

ServiceNow® Workplace Space Mapping provides indoor maps for interactive locations and wayfinding with Indoor Mapping and Mappedin. Indoor Mapping is part of the Workplace Service Delivery suite while Mappedin a third-party map provider.

Get started

Explore	Configure
Learn about Workplace Space Mapping and space optimization in your workplace with map providers.	Configure and install Workplace Space Mapping with Indoor Mapping or Mappedin as your map provider.

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Using	References
Use Workplace Space Mapping for interactive locations and reservation management in your workplace.	Work with Workplace Space Mapping tables, properties, and components.

Exploring Workplace Space Mapping

Workplace Space Mapping provides interactive locations and wayfinding solutions in your workplace with Indoor Mapping and Mappedin. Indoor Mapping provides inbuilt indoor maps for Workplace Space Mapping. Mappedin is a third-party map provider.

Synchronize Workplace Indoor Mapping with Workplace Service Delivery

- Indoor Mapping is the inbuilt map provider with Workplace Service Delivery suite for wayfinding within workplaces.

  Note: Install both Indoor Mapping and the dependent plugin Workplace Indoor Mapping.

- To synchronize Indoor Mapping map data and map objects (campus, buildings, floors, place, and place types) that you created in Indoor Mapping Map Studio with Workplace Service Delivery, see Synchronize Indoor Mapping with Workplace Service Delivery.

Using External IDs

Use external IDs to resolve spaces that do not match the locations in Workplace Service Delivery from Indoor Mapping or Mappedin maps after importing or synchronizing a building.

Configuring Workplace Space Mapping

Install and Configure Workplace Space Mapping with Indoor Mapping and Mappedin (third-party map provider).

Setting up Workplace Space Mapping

Configure and synchronize Indoor Mapping and Mappedin map data and objects with Workplace Service Delivery.

Activating Workplace Space Mapping

Activation of the Workplace Space Mapping plugin depends on what family release you are currently using.

For Workplace Service Delivery to work with Workplace Indoor Mapping and Mappedin install both Indoor Mapping and Workplace Indoor Mapping plugins from store. For Mappedin install the Mappedin plugin (sn_wsd_mappedin) from store.

Configure Indoor Mapping with Workplace Service Delivery

Synchronize the Indoor Mapping map data and map objects to work with Workplace Service Delivery, see Configure Workplace Indoor Mapping.

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Configure Mappedin with Workplace Service Delivery

To use Mappedin as your third-party map application, complete the configuration requirements.

Mappedin integration requirements

Requirement	Description
Obtain Mappedin credentials and export credentials	ServiceNow uses credentials provided by MappedIn to import space data (buildings, floors, and spaces). Export credentials are required by the ServiceNow AI Platform to render a Mappedin map and to successfully periodically reimport updated floor plans. • The Client ID credential is the equivalent of a user name in Workplace Core • The Client Secret is the equivalent a password in Workplace Core
Install and activate the Mappedin integration	Install and activate the Mappedin integration in order to use Workplace Space Mapping to manage imported data and customize the map. For more information, see Install the Mappedin integration
Enter credentials in Workplace Space Mapping	You must enter your Mappedin credentials in Workplace Space Mapping. For more Maintain Workplace Service Delivery Mappedin credentials
Configure a connection in Workplace Space Mapping	The base system provides a pre-configured connection to Mappedin.

Maintain Workplace Service Delivery Mappedin credentials

To configure and work with Mappedin ensure that you have a valid login credential. Work with the Mappedin to obtain these credentials.

Before you begin

Role required: sn_wsd_mappedin.admin

Procedure

1. Navigate to **All** > **Space Mapping** > **Mappedin Administration** > **Credentials**.
2. Click **Mappedin Credentials**.
   These credentials are the Client ID and Client Secret that enables you to render a map.
3. Enter the information provided by Mappedin.
4. Click **Update**.
5. Click **Mappedin Export Credentials**.
   These credentials are the Client ID and Client Secret that enables you to export a map.

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6. Enter the information provided by Mappedin.
7. Click **Update**.

Customize the map properties

Customize how your map renders in the Workplace Service Portal by configuring Workplace Space Mapping properties.

Before you begin

Role required: admin

About this task

Indoor maps properties are specific to ServiceNow AI Platform capabilities. Map properties are customizable and define and determine the appearance of the legend, labels, or text that is displayed on an indoor map. Select Indoor Mapping or Mappedin as your map provider. Indoor Mapping is an inbuilt map provider with Workplace Service Delivery.

Note: The map legend is available only on the map view in **Workplace Core** > **Workplace services portal** > **Make a reservation**.

Procedure

1. Navigate to **Space Mapping** > **Map properties**.
2. Set the map properties based on your preference.

   For more information about the map properties, see Properties installed with Workplace Space Mapping.
3. Click **Save**.

Configure Workplace Indoor Mapping

Configure Indoor Mapping map data and objects to work with Workplace Service Delivery with Indoor Mapping.

Role: admin.

Create and manage indoor map data and map objects with Indoor Mapping Map Studio. Add indoor maps as your map provider and import the indoor map objects in Workplace Service Delivery. Integrate your maps and place types to provide indoor navigation and wayfinding.

Navigate through indoor spaces with inbuilt indoor maps Workplace Service Delivery. You can manage reservations, locate a space or desk near a colleague, or move a desk or report issues. Employees can use the Workplace Service Delivery service portal. Indoor Mapping provides interactive locations and wayfinding for workplace users.

1. Get real-time insights on space utilization within a building like meeting rooms, venue, and workspaces using Reservation Management.
2. Fulfill service requests quickly with Workplace Service Delivery case management. View space details and use indoor maps to locate a campus, building, or floor interiors.
3. Use Workplace Service Delivery move management to request a desk move from one location to another if a workspace is mapped to Indoor Mapping map data.
4. Provide interactive locations and wayfinding solutions by entering the start and destination points on indoor maps from a space in a campus, building, or floor for workplace users.

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Install Workplace Indoor Mapping dependent plugins

Install the dependent plugins for Indoor Mapping.

Before you begin

Role required: admin

Visit the ServiceNow Store website to view the required apps for integrating Indoor Mapping with Workplace Indoor Mapping.

Note: Install the Workplace Indoor Mapping Core plugin (sn_wsd_indoor_map) in your ServiceNow instance before you install Indoor Mapping plugin (sn_map_core).

For cumulative release notes and information for all released apps, see the ServiceNow Store version history release notes.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for **Workplace Indoor Mapping** and **Indoor Mapping** in the application name using the filter criteria.
3. Review the application dependencies.

   Install the dependent plugins before installing Indoor Mapping.
4. The following dependent plugins must be installed to integrate Indoor Mapping with Workplace Service Delivery.

Dependent plugins required for Indoor Mapping installation

Dependent plugins	Description
Workplace Core (sn_wsd_core)	Provides workplace shift management and scheduling capabilities for workplace managers.
Workplace Space Mapping (sn_wsd_space_map)	Provides space-mapping capabilities to support Workplace Service Delivery. **Note:** When Workplace Indoor Mapping is installed, it automatically installs Workplace Space Mapping.
Workplace Reservation Management (sn_wsd_rsv)	A universal reservation application offering unified reservation experience to your employees. The application enables employees to reserve rooms, desks, or any other workplace item at their desired time. You can view relevant information and services that are available for reservation at each location using Indoor Mapping maps.
Workplace Case Management (sn_wsd_case)	Workplace Case Management application that fulfills workplace service requests.

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Dependent plugins	Description
Workplace Move Management (sn_wsd_move)	Enables an employee to relocate from one location to another. Employees can collaborate, communicate, and easily manage space changes using the Workplace Service Portal.

Create a new Indoor Mapping space

Create a Indoor Mapping space in Workplace Indoor Mapping.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Space Mapping** > **Indoor Maps Administration** > **New Indoor Mapping Space**.
2. Complete the following information:

New Indoor Mapping Space

Field	Description
Number	Auto-generated unique number to identify a space.
Active	Space is active or inactive.
Name	Place name as it appears in a workplace.
Is Reservable	Workplace user can reserve the space using the reservation management.
Title	Space title that appears on Indoor maps.
Space Type	Space type. For example: meeting rooms
Region	Geographical region where the space is located.
Site	Site name.
Campus	Campus where the space is located.
Building	Building where the space is located.
Floor	Floor name.
Area	Area name.
Is reservable	Check box option to specify if the space can be reserved.
Space type	Type of space or place. For example: Elevator, cafe, restroom and so on.
Managed by group	Workplace Service Delivery user group name.
Managed by	Workplace Service Delivery facility manager or admin user name.

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Field	Description
Indoor map place	Indoor mapping location. Ensure that the parent hierarchy is synced to view available locations. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.

3. Click **Submit**.

Configure Mappedin

Mappedin is a third-party Indoor map provider. Integrate Mappedin with Workplace Service Delivery to provide indoor navigation.

Configure Mappedin Overview

Mappedin version 1.11.0 is not available for new customers to install. Existing customers can upgrade to Mappedin version 1.11.0.

Mappedin indoor mapping software is integrated with Workplace Service Delivery to deliver digital mapping platform for employees and workplace users.

Integrate Mappedin with Workplace Service Delivery

Integrate Mappedin with Workplace Service Delivery to provide employees, facility managers, and workplace users the ability to leverage indoor navigation capabilities. Floor plans are updated in real-time to provide a seamless navigation inside the workplace areas, buildings, and floors. Mappedin provides interactive locations and wayfinding solutions within a workplace space. The integration allows customers to easily switch back and forth from the Workplace Service Delivery solution to the Mappedin map editor using Single Sign-On (SSO).

Facility managers can edit floor plans in real-time and employees can reserve a workplace space using the interactive floor maps to view the reserved, unavailable, and available spaces for booking a meeting room and so on. The spaces are color coded to differentiate such spaces from each other.

Install the Mappedin integration

Activate the Mappedin integration if you have the admin role.

Before you begin

Role required: admin

About this task

Mappedin is integrated with Workplace Service Delivery depending on the release version:

- For the Rome and later releases, install the Workplace Service Delivery with Mappedin (sn_wsd_mappedin) plugin and the Mappedin plugin from store.
- For the New York release with the full Workplace Service Delivery Suite (sn_wsd_suite) or just a few applications, ServiceNow Customer Service must first activate the following plugins:

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- ServiceNow IntegrationHub Runtime (com.glide.hub.integration.runtime)
- ServiceNow IntegrationHub Action Step - REST (com.glide.hub.action_step.rest)

After these plugins are activated, activate Workplace Space Mapping (sn_wsd_space_map).

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Maintain import properties

Use Import Properties when you create your own credential records, scheduled imports, or data sources. Currently, the properties are configured for the records used when importing.

Before you begin

Role required: sn_wsd_mappedin.admin

Procedure

1. Navigate to **All** > **Space Mapping** > **Mappedin Administration** > **Import properties**.

   Note: Only make edits if you are configuring your own credential records, scheduled imports, or data sources.

2. Make edits to properties.
3. Click **Save**.
   Other properties are found under the System Property [sys_properties] table.
4. Enter `sys_properties.list` in the navigation filter and open the following properties

System property	Description
sn_wsd_core.external_id_generator.field	Defines the external ID.
sn_wsd_core.external_id_generator.max_buildings	The maximum number of buildings to generate IDs for with a single selection. 50 is the default.
sn_wsd_core.external_id_generator.max_spaces	The maximum number of spaces to generate IDs for at a given time. The default is 5000.

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System property	Description
sn_wsd_core.external_id_generator.stagger	The amount of time (in seconds) to stagger processing external ID generations. The default is 300 seconds.

Convert Mappedin data to Workplace Space Mapping data

Use the **Mappedin Type Mappings** table to convert data from Mappedin to Workplace Space Mapping data.

The **Mappedin Type Mappings** table has configurations to convert the Type and Subtype data used in a Mappedin map to **Table** and **Space type** used in Workplace Core.

Terms

The terms used in Mappedin and how they relate to Workplace Core:

Mappedin and Workplace Core terms

Mappedin term	Workplace Core term
Venue	Building
Map	Floor
Location	Spaces

Mappedin data

For example, you want to convert a Mappedin map with the following information:

- Single floor building
- 14 total locations
  - 10 desks (Mappedin type = Desk)
  - Two conference rooms (Mappedin type = Meeting room)
  - Two restrooms (Mappedin type = Amenities, Subtype = Universal Washroom)

Workplace Core data

You want to convert the Mappedin data from the 14 locations, and want them converted to:

- Desks
- Rooms
- Restrooms

Note: You don't want all the Mappedin data to be converted to Spaces or Desks.

Type mappings

To ensure your locations move to the correct Space (sn_wsd_core_space) or Room (sn_wsd_core_room) tables, and ensure that the locations have the correct type (Restroom or Desk), make the following type mappings in the **Mappedin Type Mappings** table:

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- Mappedin locations with the type = Desk (no subtype) converted to the Space (sn_wsd_core_space) table and have the Space type set to Workspace/Desk.
- Mappedin locations with the type = Meeting room (no subtype) converted to the Room (sn_wsd_core_room) table and have the Space type set to Room.
- Mappedin locations with the type = Amenities and subtype = Universal Washroom converted to the Space (sn_wsd_core_space) table and have the Space type set to Restroom.

You can import a Mappedin building (single floor building) and the 14 locations go to the correct tables and have the correct types.

Maintain type mappings

Use **Type mappings** to convert the Type and Subtype locations in Mappedin to the Table and Space type used in Workplace Space Mapping.

Before you begin

Role required: sn_wsd_mappedin.admin

Important: In the Workplace Service Delivery Suite, from Workplace Core version 2.5.3, the **Space type (space_type)** choice field is depreciated. After the upgrade, Space types are configured in the **Space Type Configuration**. The **Space type (space_type)** field is migrated as **Space type (location_type)** field in the Space table [sn_wsd_core_space]. Customers having customization on the depreciated **Space type (space_type)** field are advised to manually migrate their flow to use the new **Space type (location_type)** field. A new fix script, **Populate Location Type from Space Type**, is introduced to execute the schedule job, **Populate location_type from space_type**, on the Space table [sn_wsd_core_space] to migrate the depreciated **Space type (space_type)** field value to the new **Space type (location_type)** field.

Procedure

1. Navigate to **All** > **Space Mapping** > **Mappedin Administration** > **Type mappings**.
2. Click **New** and complete the following:

Mappedin Type Mapping

Field	Definition
Mappedin type	The Mappedin Location type. When a Mappedin map imports, the type is associated with the Space type. The base system provides Mappedin types and subtypes that are associated with Workplace Core Table and Space type.
Mappedin subtype	The Mappedin Location Amenities type. For example: ○ Women's washroom ○ Men's washroom
Table	The Space (sn_wsd_core_space) table you want to import a Mappedin Location into.

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Field	Definition
	Note: The Location type and Subtype must match the Mappedin type and Mappedin subtype fields.
Space type	The space type you are associating a Mappedin location. **Note:** The Location type and subtype must match the Mappedin type and Mappedin subtype fields. The value in this field appears on the rendered map when an employee reserves a space.

3. Click **Submit** or **Update**.

Import a new building - Mappedin

Use **Import a new building** to import the Mappedin map and define the building details.

Before you begin

Role required: sn_wsd_mappedin.admin

Note: You can only import Mappedin maps. Before running an import, back up the building, floor, and spaces.

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Import a new building**.
2. Fill in the fields.

Mappedin venue

Field	Description
Number	A unique number automatically generated by the application that identifies the building.
Name	Name of the building. **Note:** Be specific and have a consistent naming convention when naming your buildings.
Region	Geographic location of the building. Click the Lookup using list icon to view a list of regions you can select.
Site	The location of the building within a region.

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Field	Description
	Click the Lookup using list icon to view a list of sites you can select.
Campus	Name of the campus if you have multiple buildings at a site.
Select a venue to import	The name of the Mappedin venue you want to import.
External ID	The Mappedin external ID that represents the map you are importing. The value defaults to the name of the Mappedin venue. **Note:** After selecting a venue, do not change the External ID.
Active	Option indicating whether this building is active.
Is reservable	Option indicating whether a workplace user can reserve spaces for the building.
Managed by group	The group that manages the space reservation for the building. Click the Lookup using list icon to view a list of groups you can select.
Managed by	The workplace manager of the group that manages the space reservation for the building. Click the Lookup using list icon to view a list of group managers you can select.

3. Click **Import**.
   The **Import Building On-Demand** designer flow initiates. The **Floors**, **Areas**, and **Spaces** related list tabs appears. If values do not appear, try refreshing the form.
4. Review the imported Mappedin data and make corrections.
5. Click **Update**.

Import an existing building - Mappedin

Follow these steps to import an existing building for a Mappedin map.

Before you begin

Role required: sn_wsd_mappedin.admin

Procedure

1. Create external IDs for the buildings you want to import.
   For instructions, see Use external IDs to match spaces between Workplace Service Delivery for Mappedin.

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2. Click **Yes** in the confirm dialog box.
   An email arrives with links to the buildings, floors, and space lists in a specific view. The list layout in the email has columns relevant to Mappedin.
3. Export the records in a spreadsheet and send to Mappedin with the floor plans.
   Mappedin creates floor plans with the external IDs.
4. Navigate to **Workplace Core** > **Space Administration** > **Buildings**.
5. Select the building and click the **Update this building's Mappedin import** related link.
6. From the **Select a venue to import** list, select the venue.
7. Select **Update**.

Using Workplace Space Mapping

With Workplace Space Mapping, your organization can integrate with third-party applications such as Mappedin, customize imported maps, and manage the required data.

View interactive location directories

You can view your imported map in interactive location directories.

Type mappings

When you integrate with a indoor map provider - Indoor Mapping or Mappedin, you must first associate the map types to the map types used by Workplace Service Delivery. This association ensures that your spaces are imported to the correct table with the correct type (Workplace and Desk).

- Indoor Mapping provides inbuilt indoor maps for indoor navigation and wayfinding. Synchronize Indoor Mapping place types with Workplace Indoor Mapping places and spaces. Configure Indoor Mapping place and place type in the Map studio and then import the map objects and place types in Workplace Indoor Mapping. After the map data and map objects are synchronized, use Workplace Service Portal for managing reservations within workplace, case management, and move management. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
- Mappedin is a third party map provider and provides indoor maps and wayfinding for workplace users. For more information on how type mappings are converted from Mappedin to Workplace Space Mapping, see Convert Mappedin data to Workplace Space Mapping data.
- For more information on maintaining type mappings for Mappedin, see Maintain type mappings.

Import flow

The weekly (Saturday) **Auto-Import Buildings** iHub Flow keeps your map up to date by querying the API of your integrated applications. Any changes to one building in the application's software should be reflected in Workplace Space Mapping.

For example, if you integrate with Mappedin and the Auto-import Buildings iHub Flow runs successfully:

- The Auto-Import Buildings iHub Flow queries for all buildings associated with Mappedin.
- The Auto-Import Buildings iHub Flow works with the Mappedin export API to look for any changes to a building made by Mappedin. If there are changes, the building is updated.

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External IDs

Use external IDs to resolve spaces that don't match locations between Workplace Service Delivery Mappedin after importing a building or for existing buildings. For more information, see Use external IDs to match spaces between Workplace Service Delivery for Mappedin.

Configuring map properties

Configure map properties to customize the way your map renders in the Workplace Service Portal location directory. For more information, see Customize the map properties. For more information about space update and allocation using interactive floor maps, see Map-based Administration Edit a building's spaces using a map.

Use external IDs to match spaces between Workplace Service Delivery for Mappedin

After importing a new Mappedin building or after importing an existing Mappedin building, if the locations don't match in Mappedin and Workplace Service Delivery, then use external IDs to resolve space location issues.

Before you begin

Role required: employee and admin

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration** > **Buildings**.
2. Click a building that has spaces that don't match locations.
3. Click the **Generate external IDs** related link.
4. Click the **Spaces** tab.
   External IDs appear for each space. You can also create external IDs for multiple buildings.
5. From the **Buildings** list, check each building that you want external IDs for.
6. Click **Action on selected rows** and select **Generate external IDs**.

   Note: Buildings with spaces that have existing external IDs are ignored.

7. Click **Yes** on the **Confirm** pop-up.
   An email notification verifies the generated external IDs for the spaces, floors, and buildings. Use the links in the email to export a file that you can provide to Mappedin.

Workplace Space Mapping reference

Learn more about Workplace Space Mapping and the components installed with it, such as specific user roles.

Components installed with Workplace Space Mapping

Several types of components are installed with Workplace Space Mapping, including tables and user roles.

Roles installed with Workplace Space Mapping

Roles installed with Workplace Space Mapping

Role title [name]	Description	Contains roles
Workplace Space Mapping admin	As a system admin, you can do the following:	sn_wsd_mappedin.admin

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Roles installed with Workplace Space Mapping (continued)

Role title [name]	Description	Contains roles
[sn_wsd_space_map.admin]	• Access the application completely. • Create, manage, and edit a Connection configuration. • Establish OAuth credentials. • Create, manage, and edit Calendar providers. As a Workplace Space Mapping space map admin, you can do the following: • Create, manage, and edit floor maps from Mappedin. • Manage map properties and customize the map legend.	
Workplace Service Delivery Mappedin admin [sn_wsd_mappedin.admin]	Create, manage, and edit floor maps from Mappedin.	• flow_operator • import_admin • web_service_admin
Indoor Mapping administrator sn_wsd_indoor_map.admin	• Sets up the Indoor Mapping map data and objects in the Workplace Indoor Mapping map studio. • Has complete access to the application.	user_criteria_admin Can manage the User Criteria records.

Tables Installed with Workplace Indoor Mapping

Tables Installed with Workplace Indoor Mapping

Table Name	Description
Indoor Place Type Mapping (sn_wsd_indoor_map_place_type_mapping)	Indoor Mapping place and place types are mapped to Workplace Service Delivery places and space types.
Indoor Map / WSD Floors Synchronization sn_wsd_indoor_map_floor_sync	Synchronizes Indoor Mapping floors with Workplace Service Delivery floors.
Indoor Map / WSD Types Synchronization sn_wsd_indoor_map_type_sync	Synchronizes Indoor Mapping Types with Workplace Service Delivery Types. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.

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Tables Installed with Workplace Indoor Mapping (continued)

Table Name	Description
Indoor Map / WSD Cleaning sn_wsd_indoor_map_clean_sync	If Indoor Mapping map objects or map data is removed from a campus, the Cleaning process is available as a first step in the Synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.

Properties installed with Workplace Space Mapping

The following properties are installed with Workplace Space Mapping. Navigate to **All** > **Workplace Space Mapping** > **Properties** or enter sys_properties.list in the context menu and search for Workplace Space Mapping properties.

Workplace Space Mapping properties

Property	Description
sn_wsd_space_map.mapping_technology	Map provider used for workplace reservations and wayfinding. You can select Mappedin or Indoor Mapping as the map provider for your instance.
sn_wsd_space_map.legend_available_text	Text that is displayed for the `Available` legend.
sn_wsd_space_map.legend_available_color	Color that is used for available rooms. The value must be a valid CSS color. If this property is empty, the default color is used.
sn_wsd_space_map.pattern_available	Name of the image that you want to use for available space patterns.
sn_wsd_space_map.selected_item_color	Color that is used for a selected item on the map. The value must be a valid CSS color. If this property is empty, the default color is used.
sn_wsd_space_map.legend_booked_text	Text that is displayed for the `Booked` legend.
sn_wsd_space_map.legend_booked_color	Color that is used for booked rooms. The value must be a valid CSS color. If this property is empty, the default color is used.
sn_wsd_space_map.display_seat_assignment	Displays the permanent seat assignments on the location directory.
sn_wsd_space_map.pattern_booked	Name of the image that you want to use for reserved space patterns.
sn_wsd_space_map.margin_between_labels	Adjusts the margin between labels measured in pixels. The range of values is between `1` and `50`. This property is specific to Mappedin.
sn_wsd_space_map.show_rsv_occ_data_loc_dir	Displays Reservation and Occupancy information on the location directory.

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Workplace Space Mapping properties (continued)

Property	Description
sn_wsd_space_map.auto_refresh_show_rsv_occ_data_in_dir	Add a refresh time interval in minutes to show reservation and occupancy information on location directory. Auto-refresh is turned off if this property is set to 0 or a negative number. Based on this value, the map is automatically updated to display the latest reservation and occupancy information for a selected location.
sn_wsd_space_map.display_neighborhood_on_floor_map	Set the neighborhood indicator on the location directory. You can select one of the following options: • **Available**: The employees can view and filter spaces by neighborhoods. You can select the **Neighborhood** check box on the location directory to view neighborhoods for a selected floor. • **Inactive**: The **Neighborhood** check box is inactive and not available on the location directory. Employees can't view neighborhoods for a selected floor. • **Default**: The **Neighborhood** check box is available on the location directory and selected by default. • **User preference**: The **Neighborhood** check box is available on the location directory but not selected. If you select this option, your preference is stored in your next browser session. To disable neighborhoods on the location directory, you can clear the **Neighborhood** check box.
sn_wsd_space_map.location_directory_filter_persistence	Enable persistence of filters on the location directory. If this property is set to **true**, filters are retained across browser sessions and tabs. If you log out and log in to the location directory, the space availability filter is retained from your last browser session.
sn_wsd_space_map.map_default_location	Default location that is zoomed into when you open the location directory. You can select one of the following values:

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Workplace Space Mapping properties (continued)

Property	Description
	• **World map**: The location directory opens in the world map view and doesn't zoom into any location. • **Workplace Profile**: The location directory opens and zooms into your workplace profile location. • **User preference**: The location directory zooms into the location that you select.
sn_wsd_space_map.default_label_on_map	Default value that is used for the labels on the map. Select one of the following options: • **Space name**: Only the space name or space ID is displayed on the map. • **Space and user names**: The space name and the assigned user's name are displayed on the map. If a space doesn't have an assigned user, only the space name or space ID is displayed. • **User preference**: Your last session details are cached in the Map settings. Selecting the map displays these options on your next login. For example, if in your previous login session, you selected **Space Name**, the application caches this information and the Space name option for a space is displayed when you login next The map label shows personalized option based on the employee's selection from their previous login session.
sn_wsd_space_map.default_label_on_map_reservation	Default value used to display labels on map on the reservation portal search page.

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Workplace Space Mapping properties (continued)

Property	Description
	Note: This property is displayed only when any of the following properties are enabled in Workplace Space Mapping and Workplace Core respectively: • sn_wsd_space_map.display_seat_assignment: Displays the permanent seat assignments on the location directory. For more information, see Properties installed with Workplace Space Mapping • sn_wsd_core.floor_plan.portal.show_reservation_details: whether reservation details appear when users point to booked spaces on the floor plan in Workplace Service Portal. For more information, see Properties installed with Workplace Core. ○ Type: true|false ○ Default value: false Employees can select one of following options in (sn_wsd_space_map.default_label_on_map_reservation): • **Space name**: The space name or space ID is displayed on the map. Default value is set to Space name. After enabling this property, navigate to the reservation portal search page and select the Map view option. Spaces on the map shows space IDs or names. Example: A1.0501, A1.0502. Select map settings and notice that the **Don't show employee names** option is enabled. The map shows only space identifiers or space names and doesn't show employee names. • **Assigned user**: The assigned employee name or permanent seats for employees with a workplace profile are displayed on the map. For this property to work, make sure that you have enabled the *Enable Display of permanent seat assignments on map* property in Workplace Space Mapping. After enabling *Enable Display of permanent seat assignments on map*, navigate to the Reservation portal

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Workplace Space Mapping properties (continued)

Property	Description
	search page and select the Map view option. **Note:** If a space doesn't have an permanent seat assignment or workplace profile assigned to it, only the space name or space IDs are displayed. Enabling the *Enable Display of permanent seat assignments on map* property shows only permanent seating of employees on the map and it doesn't show temporary reservations. • **Reserved User**: The reserved user's name is displayed on the name along with the space name. **Note:** Make sure to enable sn_wsd_core.floor_plan.portal.show_reservation_details property on Workplace Core. After enabling the *sn_wsd_core.floor_plan.portal.show_reserva* Workplace Core property, navigate to the reservation portal search page and select the Map view option. For reserved spaces, the map shows the name of the person who reserved it. For example, if Abel Tuter reserved a space, the map shows Abel Tuter. • **User preference**: Your last session details are cached in the Map settings on the reservation portal search page. Selecting the map displays these options on your next login. For example, if in your previous login session, you selected Reserved User, the application caches this information and the *Reserved User* option for a space is displayed when you login next. For example, if an employee selects the following:

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Workplace Space Mapping properties (continued)

Property	Description
	○ Space name: Map shows the space IDs or space names. ○ Assigned user: Map shows permanent seating names. ○ Reserved user: Map shows reservation owner names. The map label shows personalized option based on the employee's selection from their previous login session.

Workplace Space Management

Efficiently supervise every single location of your organization by using the ServiceNow® Workplace Space Management application.

Get started

Explore



Learn about Workplace Space Management concepts and features

Configure



Install and Configure Workplace Space Management

Manage



Manage Workplace Space Management location records

References



Learn about Workplace Space Management roles, properties, and components

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

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Exploring Workplace Space Management

Space Management helps workplace users find and book a desk near their team members, reserve meeting rooms for a client or team meeting, and reserve parking spaces. It allows the inventory of available workplace spaces to be optimized for employees so that they can perform their work more efficiently.

Enhanced space administration

The Workplace Space Management application is an enhanced and upgraded version of the existing Space administration module that is available in the ServiceNow® Workplace Core application. While you have a complete access to the Workplace Core application, the Workplace Space Management application in addition enables you to perform workplace-related forms in the Space Management view.

Workplace Space Management

Monitor workplace locations

As a Workplace manager, the application enables you to administer any workplace location, such as employee workspaces, conference rooms, office buildings, campuses and more. You can perform any action on a workplace location at a single place in simple steps. You can manage regions, sites, campuses, buildings, floors, areas, rooms, and spaces using the application.

Perform exclusive space-related actions

Apart from the features provided by Workplace Core, the Workplace Space Management application enables you to do the following exclusive space-related actions:

- Use all space administration-related actions available in the Workplace Core application.
- Specify the measurement details of a location such as the measuring unit and size of a space.
- Assign a cost center or department to a space.
- Configure a workspace or desk as flexible or permanent.
- Configure a space type as usable.
- Update or recalculate a workplace location's total and usable size whenever there are changes.
- View the reason for anomalies caused in a workplace profile.

For more information about each feature, refer to Managing workplace locations.

Optimize spaces by planning scenarios

Install Workplace Central application to use the Space optimization feature that helps you plan scenario to your allocate spaces, change user assignment and make other space-related changes in an efficient way. Perform scenario planning using stack plans and a floor map view. For more information about Workplace Central - Space optimization, refer to Space Optimization.

Use Workplace Core features

The application enables you to perform the following actions the same as you would do in the Workplace Core application, but with extra features:

- Create records for your workplace data.
- Configuring spreadsheets to import workplace data.

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- Add a space type configuration.
- Block a workplace location.

Space Optimization

As a space planner, you can use the Workplace Central to monitor all your scenarios and workplace-related information from a single page called Space Optimization.

Benefits of Space Optimization

As a space planner, you can do the following using the Space Optimization module:

- View the active number of all the scenarios created in your organization, the ones that were created by you, published scenarios and draft scenarios.
- View and work on space assistance requests raised in the organization.
- Monitor the total number of space assistance requests raised and view their current status at any time.
- Create a scenario for a building or multiple buildings.
- Open a scenario owned by you and make changes using the stack plan.
- View a scenario and see the space allocations in a stack plan or floor map view. You can review a scenario in a read-only mode and share your feedback on space allocations with the scenario owner or other stake holders.
- Create a single scenario or multiple scenarios. You can work on multiple scenarios at a time, and publish them so that your colleagues or stake holders can review. After finalizing, you can deploy the best one.
- View all buildings stack plans of your organization. You can also create a scenario directly from the building details page.
- Perform map-based administration with Workplace Indoor Mapping maps. View space allocations and assignments on a floor map. Change allocations on the map directly.
- View users assigned to a space, assign a user to a space or remove an assigned user.
- Change a space assignment from flexible to permanent or vice versa.
- Add, change, or remove a single allocation or multiple allocations at a time if you want to change their existing department or cost center.

For more information about the Space Optimization homepage key features, refer to Space Optimization - Key features and actions.

Installing and accessing Space Optimization

You must install the following plugins to use the Space Optimization module:

- Workplace Central
- Workplace Space Management
- Workplace Case Management
- Workplace Indoor Mapping

To open the Space Optimization module, follow any of the following steps on Employee Center:

- Navigate to **Workspaces** > **Workplace Central** > **Space Optimization**.
- Navigate to **All** > **Workplace Central** > **Workplace Central** > **Space Optimization**

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You can also view the scenarios created by you from **All**

View Space Optimization metrics

You can view Space Optimization metrics in the Workplace Analytics dashboard. For more information, see View Space Optimization metrics.

View Space Occupancy metrics

Ensure that you have installed the Workplace Connectors application. For more information Occupancy Dashboard metrics, see View Occupancy Dashboard.

Scenario Planning

Manage space allocations in your workplace in the most efficient way using the Space optimization scenario planning feature. Adjust your existing space allocations, floor arrangements, and employee seating plan by creating a scenario and deploying it.

Overview of Scenario Planning

The Workplace Central is like a central homepage where you can monitor all your workplace-related tasks. The Workplace Central provides you the Space optimization module that enables you to create scenarios using a stack plan and view the plan on the floor map. Using the Space optimization module, as a space planner you can perform several actions related to scenarios such as creating a scenario, monitoring the number of scenarios created and more. For more information about the Space optimization module, refer to Space Optimization.

Space Optimization enables you to perform scenario planning using a stack plan and a floor map. Scenario planning enables you to create multiple versions of a building with different space allocations until you finalize the best plan. You can share a scenario between multiple stake holders and deploy the best plan to the production.

Working with Scenario planning

To create a scenario using the space optimization feature, you must install the latest version of the following plugins:

- Workplace Central
- Workplace Space Management
- Workplace Move Management
- Workplace Indoor Mapping

Install the plugins from the from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
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Using the Space optimization module you can create scenarios for a single building or multiple buildings. You can perform the following actions while working with a scenario:

- A scenario creates a copy of a building with its entire space allocation plan and displays in on a stack plan, according to floors. A stack plan enables you to view all the allocations made on different floors of a building with clear divisions and colors.
- Using the stack plan, visualize spaces and departments as bars and move them to different floors as required. The bars are color-coded and depending on the allocation, the numbers are displayed. You can view unallocated spaces on a floor. You can categorize the spaces based

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on their department or cost center. You can switch views depending on how you want to view the spaces.

- You can also create a copy of an existing scenario. You can create multiple scenarios of a building and compare the best plan with your stake holders. You can share these scenarios with other colleagues or stake holders by changing the ownership of the scenario and deploying it after finalizing one.
- Create a single scenario or multiple scenarios. You can work on multiple scenarios at a time, publish them so that your stake holders can review.
- Send a scenario for approval after you publish it. The application provides a default approval definition which is used to process approvals.
- You can view your approver and approval-related details in an Approver tab.
- You can deploy an approved scenario directly. In case the scenario is rejected, you can view the details of rejected and implement changes. You can send a scenario for approval multiple times till it is approved.
- Change space assignments on a floor, move a department or cost center from one floor to another, add or remove spaces, view the number of unallocated spaces, and more.
- Change the user assignment of a space, such add or remove a user.
- Vacate a floor easily by moving all the allocations to another floor with simple bar movement on the stack plan.
- Assign a space as permanent or flexible or remove the setting.
- You can also directly move spaces on a floor using the Floor map view. The Workplace Indoor Mapping floor map enables you to make allocations, assignment type, and user assignment-related actions.

Note: Ensure that you have installed Indoor Mapping to visualize and reserve spaces using floor maps.

Schedule Planning

Manage space assignments to help employees head back to the office.

Schedule Planning overview

Schedule Planning provides a streamlined experience for project managers to assign and manage employee assignments based on project time frames.

As a project manager, you can do the following:

- View a list of employees assigned to your project
- View a list of spaces allocated for your project
- Create a schedule plan for a specific period to map spaces to the employees
- Execute a schedule plan to assign spaces to the Workplace Profile of the users

Accessing Schedule Planning

You must install the following plugins to use the Schedule Planner module:

- Workplace Central
- Workplace Space Management

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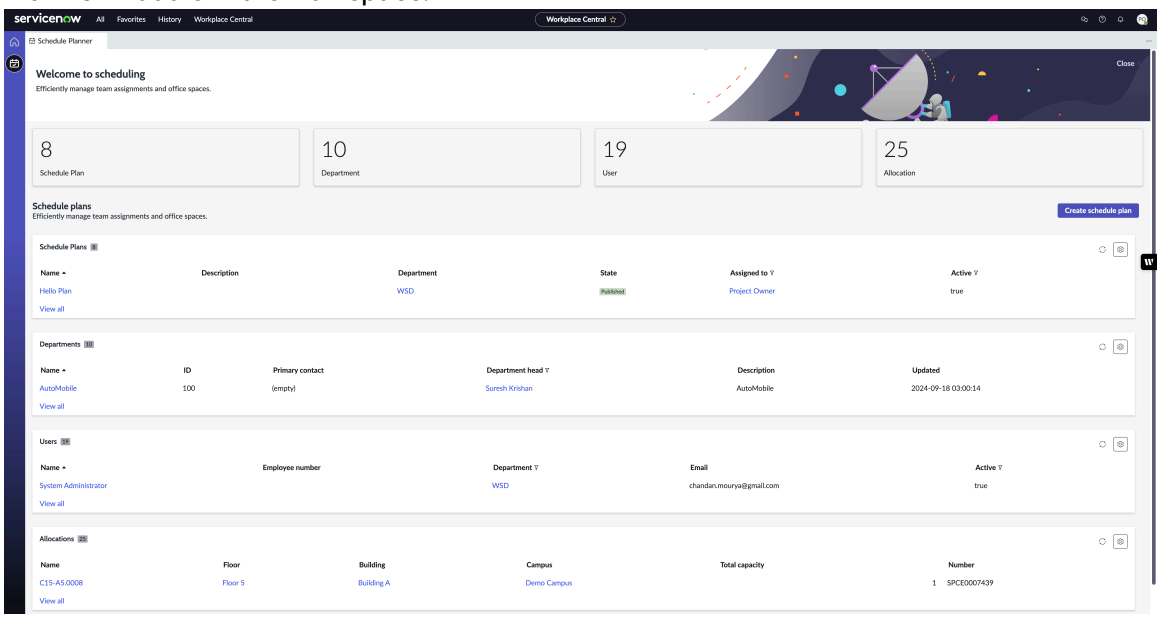
You can install the plugins from the ServiceNow Store. You can also visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information of all the released apps, see the ServiceNow Store release notes.

Important: You must set a value for the *sn_wsd_core.ALLOCATION_TYPE* property to enable schedule planning.

To access the Schedule Planner, navigate to **All** > **Workplace Central**, then select the **Schedule Planner** module in the workspace.



As a project owner, you can view the created schedule plans, projects assigned to you, and the spaces and users assigned to the projects. You can create a schedule plan or edit existing schedule plans. For more information, see Working with Schedule Planning.

Note: A project owner can create schedule plans for the projects that are assigned to them. Projects can be assigned to a user from the following fields:

- **Primary contact** field of the department
- **Manager** field of the cost center
- **Managed by group** or **Managed by** field of the workplace entity

Only one of the fields is considered for the project list based on the *sn_wsd_core.ALLOCATION_TYPE* property.

Schedule Plan states

A schedule plan can be in one of the following states:

- Draft: Project owner has created a new schedule plan but has not filled the details or started the workplace assignments.
- In Progress: Project owner has filled the schedule plan details and the workplace locations are being assigned to the users.
- Published: Schedule plan is created and the workplace locations are assigned to all the users.

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- Complete: Schedule plan has reached the specified end date and the workplace location assignments are made inactive.
- Cancelled: Project owner has cancelled the schedule plan and the workplace location assignments are made inactive.

Note: The *Complete the lapsed schedule plan* job runs every day to check which schedule plans have reached the end date and move them to the **Complete** state.

Allocation - types, setting, and impact

You can categorize the locations in your organization based on cost center, department, or workplace entity.

Allocate your workplace location to a type based on which at any time the location can be classified when performing various workplace-related activities.

Allocation types

You can allocate your workplace location under the following system provided allocation types:

- Cost center
- Department
- Workplace entity

Important: Starting from Workplace Core version 2.16.1, the allocation type **Department and cost center** is no longer available. A new allocation type **Workplace entity** is introduced that provides more advantages.

System property

The application provides you with the system property, Allocation type [*sn_wsd_core.ALLOCATION_TYPE*], which enables you to specify an allocation type based on which you want spaces to be retrieved and displayed to users while searching for spaces to reserve, during scenario planning, space recommendation and more.

When a user searches for a space to reserve, depending on the allocation type, the workplace profile of the user, and the **Reservation Allocation check** and **Enable allocation duration check** settings in the reservable module, the spaces are displayed to the users. The duration check follows only the start and end dates of the allocation, which are set in the system time zone.

If you do not specify any allocation in the system property, then the **Require Allocation check** field is not available in the reservable module form.

Setting an allocation type

On the workplace location's record, you can create or activate an existing allocation in the Allocations related list. For more information, refer to Allocate a cost center, department, or workplace entity.

If you are an existing customer and are using Workplace Core version below 2.16.1, then a fix script is automatically applied to map your existing allocations to the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] property. For example, if your allocations are based on Department, then the property is set as Department. Similarly, if your allocations are based on Cost center, then the property is set as Cost center. If your allocations include both Cost center or Department, then the property is set as empty and warnings are displayed to specify an allocation type.

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Impact of allocation

Depending on a workplace location's allocation, the following actions are performed:

- When an employee searches for a location to reserve and if the **Require allocation check** and **Enable allocation duration check** options are enabled on the reservable module, the appearance of the resultant locations depends on the allocations that the employee can access. The duration check follows only the start and end dates of the allocation, which are set in the system time zone.
- You can make allocations based on the cost center, department, and the workplace entity to which a location or employee belongs.
- You can make allocations based on the business hierarchy of your organization. You can assign a location or an employee to a workplace entity and create a hierarchy. The application enables you to configure entity types based on your businesses and assign workplace entities to them. You can also create a parent-child hierarchy between workplace entities. For more information, refer to Configure Workplace entity and entity types.
- During scenario creation, you can specify based on what type of allocation you want to group the spaces. The grouping options are displayed to you based on the allocation that is specified in the system property *sn_wsd_core.ALLOCATION_TYPE*.

  Important: You cannot create a scenario based on workplace entities. You can only view and make map space administration for workplace entities.

- During scenario planning, you can also change the **View by** option of a scenario to view based on different allocations. However, you cannot edit the scenario if the **View by** that you selected is different than the **Group by** setting of the scenario.
- In the case of scenarios that are created with a **Group by** option that is not the same as the current allocation type set in the *sn_wsd_core.ALLOCATION_TYPE* system property, then such scenarios can only be viewed in a read-only mode.
- For a space, you can create multiple allocations of different types.
- When an employee raises a space assistance request, the allocation type of the spaces is set based in the allocation type that is specified in the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] system property.

Push down functionality in Workplace Space Management

The Workplace Space Management application enables you to push down the cost center or department of a parent workplace location to its child locations.

You can assign the cost center or department to child locations such as areas, rooms, and spaces. Select the **Push down** option on the Floor or Area form to apply the values of the **Cost center** or **Department** fields. The cost center or department is applied based on the **Push down** option selected in child workplace locations.

The following table explains how the push down functionality works with respect to **Cost center** and **Department** field configuration of a workplace profile and a space:

Access to spaces based on allocation

Users can be assigned a Cost Center, Department, or Workplace Entity. The Cost Center or Department is assigned from the Users [sys_user] table and the Workplace Entity is assigned from the User Workplace Profile [sn_wsd_core_workplace_profile] table.

Access to a space depends on the type of allocation set in the sn_wsd_core.ALLOCATION_TYPE system property and the allocation set in the space configuration.

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Access to a space based on allocation type and Space Configuration

Value of the allocation type property	Space configuration	Accessibility on the space based on the configuration match
Cost center	**Cost center**: Null **Department**: Null or `<value>` **Workplace Entity**: Null or `<value>`	The user can access.
Cost center	**Cost center**: `<value>` **Department**: Null or `<value>` **Workplace Entity**: Null or `<value>`	The user can access if the Cost Center matches.
Department	**Cost center**: Null or `<value>` **Department**: Null **Workplace Entity**: Null or `<value>`	The user can access.
Department	**Cost Center**: Null or `<value>` **Department**: `<value>` **Workplace Entity**: Null or `<value>`	The user can access if the Department matches.
Workplace Entity	**Cost Center**: Null or `<value>` **Department**: Null or `<value>` **Workplace Entity**: Null	The user can access.
Workplace Entity	**Cost Center**: Null or `<value>` **Department**: Null or `<value>` **Workplace Entity**: `<value>`	The user can access if the Workplace Entity or its parent matches.
Null	**Cost Center**: Null or `<value>` **Department**: Null or `<value>` **Workplace Entity**: Null or `<value>`	The user can access.

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Configuring Workplace Space Management

Install and configure Workplace Space Management for workplace space optimization.

Install Workplace Space Management

Install the Workplace Space Management application from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.

2. Verify that the following plugins are activated:
   - Workplace Core (sn_wsd_core), minimum version 2.6.2
   - Workplace Space Management (sn_wsd_spcmgmt), minimum version 1.0

Use the following details when required:

- Name of the application: Workplace Space Management
- ID of the application: sn_wsd_spcmgmt

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Space Management) or ID (sn_wsd_spcmgmt). If you cannot find the application, you may have to request it from the ServiceNow Store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Space Management.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   > **Important:** If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Managing workplace locations

Apart from the space administration features provided by Workplace Core, the Workplace Space Management application enables you to configure exclusive space-related settings.

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To create workplace location records for buildings, floors, areas, and spaces you can use Workplace Core or Workplace Space Management. To add a workplace records using Workplace Core, see Create records for your workplace data.

Workplace Space Management provides more options for workplace-related functionality to the workplace location records. You can use the Workplace Space Management application to view the workplace location forms in the Space Management view.

The following features are available in the Space Management view on the workplace location form:

Measurement details

Specify the measurement details of the workplace location such as the location size and the unit of measurement. For buildings, floors, and areas, you can also specify the total size and the usable size to plan infrastructure and other maintenance activities. For more information, see Compute CAD file properties to extract space or room surface area.

Allocation

Allocate or assign a cost center, department, or a workplace entity to workplace locations to track locations and perform workplace-related activities.

Push down the allocation to child locations

Automatically assign the allocation type of the parent location to the child locations. Specify how you want to implement the push down functionality in the **Push down** field. You can track the progress of the push down process in the **Push down state** field.

The push down functionality depends on the following conditions:

- If the child location has an existing allocation, the child location's allocation is either replaced or not replaced based on the **Push down** option specified in the parent location.
- The accessibility of the spaces assigned with an allocation depends on whether the user workplace profile configuration and the Space type configuration match. For more information, see Allocation - types, setting, and impact.

Space usability

Specify whether a space type is usable. If a space type is usable, the spaces assigned to that space type are included in reservation-related activities and the usable size calculation of the parent location. If a space type isn’t set as usable, then the spaces assigned to that type aren’t included in reservation-related activities or the usable size calculation of the parent location.

Flexible or permanent spaces

Configure a space as a flexible or a permanent space. This feature is applicable only to spaces of the space type **Workspace/desk**. If you configure a space as flexible, then the space is available for reservation on the Reservation portal. If you configure a space as permanent, then the spaces ares not available for reservation on the Reservation portal.

View anomalies caused in a workplace profile

You can view the reason for anomalies in a workplace profile. Anomalies in workplace profiles are caused by a mismatch in the cost center, department, or assignment type between the user and the workplace location. For more information, see Workplace location assignment anomaly types.

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Add a campus

A Workplace Service Delivery campus contains buildings, floors, areas, or spaces.

Before you begin

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration** > **Campuses**.
2. Continue with one of the following options.

Working on a campus record

Option	Action
To add a campus manually	Click **New**.
To edit or update a campus	Click open the campus that you want to edit.

3. Click **New** to create a new campus.
   Fill in the form field information.

New campus record form

Field	Description
Name	Name of the campus. Ensure that you enter a unique name. **Note:** Do not use duplicate names because it may affect the reservation process. If you change the name of campus after updating it, a message is displayed to show that the **Name** will be overwritten in the next synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Title	Title of campus as it appears on the map.
Region	Region where the campus is situated. Click to search for a region.
Site	Campus site name. Click the search icon ( ) to search for a site.
Managed by	User assigned to manage the campus.
Managed by group	Group assigned to manage the campus.

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Field	Description
	Note: If a Workplace Service Delivery campus is synchronized with Indoor Mapping campus and if new Indoor mapping objects are added, workplace user groups are notified to synchronize the latest changes in Indoor Mapping with Workplace Service Delivery. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Latitude	Latitude coordinates of a campus location.
Longitude	Longitude coordinates of a campus location.
Active	Option to show that the campus is in active state.
Street	Street where the campus is located.
City	Address of the campus.
Zip/Postal Code	Zip or Postal code of the campus location.
Order	When a sort Order is configured for a campus, the floor names are sorted accordingly. If the sorting Order value is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The campus names are alphabetically sorted based on the label name.
Indoor map campus	Search and select the Indoor Mapping campus that you want to integrate with Workplace Core campus. The name of the Indoor Mapping campus should be same as your Workplace Core campus. Your default map provider should be Indoor Mapping.

4. If you are integrating your campus with Indoor Mapping, perform the following steps:
   a. From the Related list, select **Buildings** and set the **Is reservable** column to true for a building.
   b. Repeat Step a for floor or floors in a building.
   c. Repeat Step a for Space types.
5. The place type mappings for Workplace Core space types and Indoor Mapping place types is available in the Place types mapping table (**All** > **Indoor Mapping** > **Place types** > **Space mapping** > **Indoor Mapping administration** > **Place Type mapping**).
   If you have multiple domains in your instance, then you might have to recreate the place type mapping records in the same domain as your location records. Place types and Space types must belong to the same domain.
6. Click **Synchronize** to synchronize floors, areas, and spaces in a campus.

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Note: **Time zone** of Workplace Service Delivery campus location is required to synchronize. Workplace reservation is created in a location timezone. For more information, see Indoor Mapping place types with Workplace Service Delivery space types, see Synchronize Indoor Mapping with Workplace Service Delivery.

7. To add an Indoor map campus, select the Additional Actions icon ( ) to select **View** > **Workplace Indoor Mapping Campus**.
   a. In the **Indoor map Campus** field, search for a campus and add it.
8. Click **Update** to edit a campus.
9. Building, floors, areas, and spaces available in a campus are listed.

Add a building using Workplace Space Management

Create a record for every building that is part of your organization. Specify to which region, site, and time zone does the building belong to.

Before you begin

Ensure that the region, site, and the campus of the building are active.

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

About this task

Add details of your building. If your organization has several offices located all over the world, then add the details such as, in which region, site of the region, and campus in the site, the building that you are adding is located.

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Buildings**.
3. Click **New**.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
   The form view changes.
5. On the form, fill in the fields.

Building form

Field	Description
Name	Name of the building. Ensure that you enter a unique name. For example, use the location name `<location-name>-16` rather than just `16`.

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Field	Description
	Note: Do not use duplicate names as it may affect the reservation process. If you change the name of a building after updating it, a message is displayed to show that the **Name** will be overwritten in the next synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Region	Select the region where the building is located.
Site	Select the site in the region where the building is located.
Campus	Select the campus of the site where the building is located.
Managed by group	Group that manages the entire workplace-related operations.
Managed by	Workplace manager who manages all the workplace-related operations.
Active	Option to activate the location. This field depends on the **Status** field. If the **Status** is set as **Future** or **Retired**, then the **Active** field is turned off.
Is reservable	Option to indicate that the spaces for this building are available for reservation. For example, if you do not mark a Building as reservable, then none the floors, areas, and spaces of this building would be available for reservation.
Order	When a sort**Order** is configured, the building names are sorted accordingly. If the sorting order is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The building names are alphabetically sorted based on the label name.
Status	Status of the location. ○ If the status of the location is active, select **Active**. If you set the status to **Active**, the **Active** field is enabled. ○ if the location will be available only in the future, select **Future**. If you set the status to **Future**, the **Active** field is turned off. ○ If the location is no longer functional for usage select **Retired**. If you set the status as **Retired**, the **Active** field is turned off.

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Field	Description
	○ To make the location available only for a temporary duration, select **Temporary**. This space is available when assigned to a user or for any workplace-related activities. The **Active** field is always enabled.
Planned start date	Date for when you are planning to activate or reactivate the location. If the status is set to **Temporary**, then this date is when the location is reactivated.
Planned end date	Date by when you are planning to end the **Future** or **Retired** status of the location.
Actual start date	The date starting when the location should be active.
Actual end date	The date by when the location must be retired.
Time zone	Time zone of the building.
Latitude	Latitude of a campus or a building. The latitude is displayed in the Workplace Service Portal Location directory map.
Longitude	Longitude of a campus or a building. The longitude is displayed in the Workplace Service Portal Location directory map.
Measurement Details	
Unit	Measuring unit of the size. Depending on the selected unit, the **Total size** and **Usable size** field name changes. For example, if you select **Square feet** as the unit, then the fields are displayed as **Total square feet** and **Usable square feet**. For more information, see Compute CAD file properties to extract space or room surface area.
Total size	Total size of the building that is calculated based on the **Size** specified for each room or space on the floor. Depending on the selected unit, the **Total size** field name changes. For example, if you select **Square feet** as the unit, then the fields is displayed as **Total square feet**. The size is calculated regardless of the usability that is specified in the Space type configuration for child rooms and spaces. This field is automatically set based on the size specified in its child locations.
Usable size	Usable size in the building.

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Field	Description
	Depending on the selected unit, the **Usable size** field name changes. For example, if you select **Square feet** as the unit, then the field is displayed as **Usable square feet**. This is the amount of space that is available for planning maintenance activities, infrastructure, and so on. The usable size is calculated based on the Space type configuration for child rooms and spaces. If the **Space type** of a space is configured as **Usable**, then the size of the space is included in the calculation. This field is automatically set based on the size specified in its child locations.
Enable employee location privacy and preference	Option to set location privacy preference for the building. Note the following: ○ Set this option only if you want to have a different location privacy setup for the building. ○ By default, the location privacy preference that is set in the Workplace Reservation Management system property *sn_wsd_core.ENABLE_LOCATION_PRIVACY* is considered. ○ The field is set to **None** by default. ○ You can specify if you want to set privacy on workplace profiles, or reservations, or on both. ○ You can also select **No privacy** if you don't want any privacy for the building. ○ If the field is set as **None**, then, the privacy preferences set in the Workplace Reservation Management system property *sn_wsd_core.ENABLE_LOCATION_PRIVACY* is considered. For more information about each field, refer to Location privacy settings and impact
Allow employees to override location privacy on reservations	Enables you to let employees override the location privacy while reserving spaces that belong to this building. The field is set to **None** by default. For more information, refer to Location privacy settings and impact.

6. Select **Unlink Building** to unlink a building from Indoor Mapping map provider.
   For more information about how to link and synchronize Indoor Mapping map data objects with Workplace Indoor Mapping see, Synchronize Indoor Mapping with Workplace Service Delivery.

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7. Select **Block location** to define a time period to block these locations for reservation.
8. To add an indoor map building, select the Additional Actions icon ( ) to select **View** > **Workplace Indoor Mapping Building**.
   a. In the **Indoor map Building** field, search for a building and add it.
9. Click **Submit**.

Result
The building is added to the selected region, site, and campus.

Add a floor using Workplace Space Management

Create a record for every floor of a building. Specify the measurement details of the floor such as the total size and the usable size.

Before you begin
Ensure that the building of the floor record is active.

Role required: sn_wsd_core.admin

About this task
You can assign a an allocation to all the entities of the floor by using the push down functionality. Specify the gross and usable size of the floor to plan maintenance activities, infrastructure, workspace allocation, and more.

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Floors**.
3. Click **New**.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
      The form view changes.
5. On the form, fill in the fields.

Floor form

Field	Description
Name	Name of the floor. Ensure that you enter a unique name. For example, use the location name `<location-name>-16` rather than just `16`.

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Field	Description
	Note: Do not use duplicate names as it may affect the reservation process. If you change the name of a building after updating it, a message is displayed to show that the **Name** will be overwritten in the next synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Region	Region where the office is located. If your organization is located at several regions, select that region where the office that you are adding is located.
Site	Location of the office campus. If there are several sites in a region, select that site where the office that you are adding is located.
Campus	Name of the campus where the office operates. If there are several campuses in a site, select that campus where the office that you are adding is located.
Building	Building where the floor is located.
Active	Option to activate the location. This field depends on the **Status** field. If the **Status** is set as **Future** or **Retired**, then the **Active** field is turned off.
Is reservable	Option to indicate whether the areas, rooms, and spaces that are located on this floor are available for reservation.
Order	When a sort Order is configured, the floor names are sorted accordingly. If the sorting Order value is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The floor names are alphabetically sorted based on the label name.
Status	Status of the location. ○ If the status of the location is active, select **Active**. If you set the status to **Active**, the **Active** field is enabled. ○ if the location will be available only in the future, select **Future**. If you set the status to **Future**, the **Active** field is turned off. ○ If the location is no longer functional for usage select **Retired**. If you set the status as **Retired**, the **Active** field is turned off.

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Field	Description
	○ To make the location available only for a temporary duration, select **Temporary**. This space is available when assigned to a user or for any workplace-related activities. The **Active** field is always enabled.
Planned start date	Date for when you are planning to activate or reactivate the location. If the status is set to **Temporary**, then this date is when the location is reactivated.
Planned end date	Date by when you are planning to end the **Future** or **Retired** status of the location.
Actual start date	The date starting when the location should be active.
Actual end date	The date by when the location must be retired.
Push down	Definition of the push down functionality if the floor is associated to any allocation. The allocation is assigned to the child locations of the floor, such as rooms, areas, and spaces, based on the selected push down action. The following choices are available: ○ **No, keep floor and space/area info separate**: The cost center or department is not assigned to the areas, rooms, and spaces of the floor. ○ **Yes, and replace existing allocations**: The cost center or department is assigned to all the areas, rooms, and spaces of the floor. If an area, room, or space already has an allocation, then it is replaced. ○ **Yes, but keep existing allocations**: The cost center or department is assigned to all the areas, rooms, and spaces of the floor. If an area, room, or space already has an allocation, then it is not replaced. **Note:** The push down functionality also depends on if the **Push down** functionality is enabled on the child locations.
Push down state	State of the push down functionality. The statuses are as follows: ○ **In progress**: The push down process is still running. ○ **Completed**: The push down process is complete.
Managed by group	Group that manages the workplace-related operations.

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Field	Description
Managed by	Workplace manager who manages all the workplace-related operations.
Measurement Details	
Total size	Total size of the floor that is calculated based on the **Size** specified for each space or room on the floor. Depending on the selected unit, the **Total size** field name changes. For example, if you select **Square feet** as the unit, then the fields is displayed as **Total square feet**. The size is calculated regardless of the usability that is specified in the Space type configuration for child rooms and spaces. This field is automatically set based on the size specified in its child locations.
Usable size	Usable size on the floor. Depending on the selected unit, the **Usable size** field name changes. For example, if you select **Square feet** as the unit, then the field is displayed as **Usable square feet**. This is the amount of space that is available for planning maintenance activities, infrastructure, and so on. The usable size is calculated based on the Space type configuration for child rooms and spaces. If the **Space type** of a space is configured as **Usable**, then the size of the space is included in the calculation.

6. The **Time zone** of a location is required to synchronize Indoor Mapping and Workplace Service Delivery.
   Workplace reservation is created in a location's timezone.

   For more information, see Indoor Mapping place types with Workplace Service Delivery space types, see Synchronize Indoor Mapping with Workplace Service Delivery.

7. Select **Unlink Floor** to unlink a floor from Indoor Mapping map provider.
   For more information about how to link and synchronize Indoor Mapping map data objects with Workplace Indoor Mapping see, Synchronize Indoor Mapping with Workplace Service Delivery.
8. Select **Block location** to define a time period to block these locations for reservation.
9. To add an indoor map, select the Additional Actions icon ( ) to select **View** > **Workplace Indoor Mapping Floor**.
   a. In the **Indoor map floor** field, search for a floor and add it.
10. Click **Submit**.

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Result
The floor is added to the building.

Add an area using Workplace Space Management

Create a record for every area that is located on a floor.

Before you begin
Ensure that the floor of the area record is active.

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Areas**.
3. Click **New**.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
      The form view changes.
5. On the form, fill in the fields.

Area form

Field	Description
Name	Name of the area. Ensure that you enter a unique name. For example, use the location name `<location-name>-16` rather than just `16`. **Note:** Do not use duplicate names as it may affect the reservation process. If you change the name of a building after updating it, a message is displayed to show that the **Name** will be overwritten in the next synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Region	Region where the office is located. If your organization is located at several regions, select that region where the office that you are adding is located.
Site	Location of the office campus. If there are several sites in a region, select that site where the office that you are adding is located.

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Field	Description
Campus	Name of the campus where the office operates. If there are several campuses in a site, select that campus where the office that you are adding is located.
Building	Name of the building where the area is located.
Floor	Floor name or the number of the floor where this area is located.
Order	When a sort **Order** is configured for an area, the area names are sorted accordingly. If the sorting **Order** value is not specified for an item, then the items are listed on top of the list (ascending order), and then, sorted alphabetically. The area names are alphabetically sorted based on the label name.
Active	Option to activate the location. This field depends on the **Status** field. If the **Status** is set as **Future** or **Retired**, then the **Active** field is turned off.
Is reservable	Option to indicate whether the area, rooms, and spaces that are located in this area are available for reservation.
Status	Status of the location. ○ If the status of the location is active, select **Active**. If you set the status to **Active**, the **Active** field is enabled. ○ if the location will be available only in the future, select **Future**. If you set the status to **Future**, the **Active** field is turned off. ○ If the location is no longer functional for usage select **Retired**. If you set the status as **Retired**, the **Active** field is turned off. ○ To make the location available only for a temporary duration, select **Temporary**. This space is available when assigned to a user or for any workplace-related activities. The **Active** field is always enabled.
Planned start date	Date for when you are planning to activate or reactivate the location. If the status is set to **Temporary**, then this date is when the location is reactivated.
Planned end date	Date by when you are planning to end the **Future** or **Retired** status of the location.
Actual start date	The date starting when the location should be active.

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Field	Description
Actual end date	The date by when the location must be retired.
Capacity	Capacity of the area.
Push down	Option to define the push down functionality if the area is associated to any allocation. The allocation is assigned to the child locations of the area, such as rooms and spaces, based on the selected push down action. Choices are as follows: ○ **No, keep floor and space/area info separate**: The cost center or department is not assigned to the areas, rooms, and spaces of the floor. ○ **Yes, and replace existing allocations**: The cost center or department is assigned to all the areas, rooms, and spaces of the floor. If an area, room, or space already has an allocation, then it is replaced. ○ **Yes, but keep existing allocations**: The cost center or department is assigned to all the areas, rooms, and spaces of the floor. If an area, room, or space already has an allocation, then it is not replaced. **Note:** The push down functionality also depends on the **Push down** option enabled in the room and space of the area.
Push down state	State of the push down functionality. The statuses are as follows: ○ **In progress**: The push down process is still running. ○ **Completed**: The push down process is complete.
Managed by group	Group that manages the workplace-related operations.
Managed by	Workplace manager who manages all the workplace-related operations.
Measurement Details	
Unit	Measuring unit of the size. Depending on the selected unit, the **Total size** and **Usable size** field name changes. For example, if you select **Square feet** as the unit, then the fields are displayed as **Total square feet** and **Usable square feet**. For more information, see Compute CAD file properties to extract space or room surface area.

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Field	Description
Total size	Total size of the area that is calculated based on the **Size** specified for each room, or space in the area. Depending on the selected unit, the **Total size** field name changes. For example, if you select **Square feet** as the unit, then the fields is displayed as **Total square feet**. The size is calculated regardless of the usability that is specified in the Space type configuration for child rooms and spaces. This field is automatically set based on the size specified in its child locations.
Usable size	Usable size in the area. Depending on the selected unit, the **Usable size** field name changes. For example, if you select **Square feet** as the unit, then the field is displayed as **Usable square feet**. This is the amount of space that is available for planning maintenance activities, infrastructure, and so on. The usable size is calculated based on the Space type configuration for child rooms and spaces. If the **Space type** of a space is configured as **Usable**, then the size of the space is included in the calculation. This field is automatically set based on the size specified in its child locations.
Size Square Feet/Meters	Surface area computed in square feet or square meters. Ability to compute surface area automatically in square meters or square feet from the CAD polylines if polylines are defined as closed shapes or if a unit is set. For more information, see Compute CAD file properties to extract space or room surface area.

6. Select **Block location** to define a time period to block these locations for reservation.
7. To add an image, select the Additional Actions icon ( ) to select **View** > **Workplace**.
   a. Select an **Image** that you want to add and upload it.
8. Click **Submit**.

Result
The area is added to the floor.

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What to do next

You can add an allocation if there is none. For more information on how to add an allocation, see Allocate a cost center, department, or workplace entity. In the procedure, select the Areas module instead of the Floors module.

Add a room using Workplace Space Management

Create a record for every room located in an area or a floor. Specify the size of the room. Assign the room to a cost center or a department.

Before you begin

Ensure that the area and floor of the room are active.

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Rooms**.
3. Click **New**.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
   The form view changes.
5. On the form, fill in the fields.

Room form fields

Field	Description
Name	Name of the room. Ensure that you enter a unique name. For example, use the location name `<location-name>-16` rather than just `16`. **Note:** Do not use duplicate names as it may affect the reservation process. If you change the name of a building after updating it, a message is displayed to show that the **Name** will be overwritten in the next synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Region	Region where the office is located. If your organization is located at several regions, select that region where the office that you are adding is located.
Site	Location of the office campus. If there are several sites in a region, select that site

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Field	Description
	where the office that you are adding is located.
Campus	Name of the campus where the office operates. If there are several campuses in a site, select that campus where the office that you are adding is located.
Building	Name of the building where the room is located.
Floor	Floor where the room is located.
Area	Area where you are adding the room.
Active	Option to activate the location. This field depends on the **Status** field. If the **Status** is set as **Future** or **Retired**, then the **Active** field is turned off.
Is reservable	Option to indicate whether the room and the spaces that are located in the room are available for reservation.
Status	Status of the location. ○ If the status of the location is active, select **Active**. If you set the status to **Active**, the **Active** field is enabled. ○ if the location will be available only in the future, select **Future**. If you set the status to **Future**, the **Active** field is turned off. ○ If the location is no longer functional for usage select **Retired**. If you set the status as **Retired**, the **Active** field is turned off. ○ To make the location available only for a temporary duration, select **Temporary**. This space is available when assigned to a user or for any workplace-related activities. The **Active** field is always enabled.
Planned start date	Date for when you are planning to activate or reactivate the location. If the status is set to **Temporary**, then this date is when the location is reactivated.
Planned end date	Date by when you are planning to end the **Future** or **Retired** status of the location.
Actual start date	The date starting when the location should be active.
Actual end date	The date by when the location must be retired.
Space type	Type of the office space. To configure a new space type, see Add a space type configuration.

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Field	Description
Managed by group	Group that manages the workplace-related operations.
Managed by	Workplace manager who manages all the workplace-related operations.
Measurement Details	
Unit	Measuring unit of the size.
Size	Size of the room.
Size Square Feet/Meters	Surface area computed in square feet or square meters. Ability to compute surface area automatically in square meters or square feet from the CAD polylines if polylines are defined as closed shapes or if a unit is set. For more information, see Compute CAD file properties to extract space or room surface area.

6. Select **Create QR code** to generate and print QR codes for this space.
7. Select **Unlink Space** to unlink a space from Indoor Mapping map provider.
   For more information about how to link and synchronize Indoor Mapping map data objects with Workplace Indoor Mapping see, Synchronize Indoor Mapping with Workplace Service Delivery.
8. Select **Block location** to define a time period to block these locations for reservation.
9. To add an image, select the Additional Actions icon ( ) to select **View** > **Workplace**.
   a. Select the **Extra Information** tab.
   b. Select an **Image** that you want to add for a room and upload it.
10. Click **Submit**.

Result
The room is added to the area and room.

What to do next
You can add an allocation if there is none. For more information on how to add an allocation, see Allocate a cost center, department, or workplace entity. In the procedure, select the Rooms module instead of the Floors module.

Add a space using Workplace Space Management

Create a space record for every workspace located on a floor. Specify the space type and the size of the space.

Before you begin
Ensure that the room, area, and floor of the space are active.

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Spaces**.

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3. Click **New**.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
      The form view changes.
5. On the form, fill in the fields.

Space form

Field	Description
Name	Name of the space. Ensure that you enter a unique name. For example, use the location name `<location-name>-16` rather than just `16`. **Note:** Do not use duplicate names as it may affect the reservation process. If you change the name of a building after updating it, a message is displayed to show that the **Name** will be overwritten in the next synchronization process. For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.
Title	Title of the space.
Region	Region where the office is located. If your organization is located at several regions, select that region where the office that you are adding is located.
Site	Location of the office campus. If there are several sites in a region, select that site where the office that you are adding is located.
Campus	Name of the campus where the office operates. If there are several campuses in a site, select that campus where the office that you are adding is located.
Building	Name of the office building for this workspace. If there are several buildings in a region, select that building where the office that you are adding is located.
Floor	Name or number of the floor where this workspace is present.
Area	Name of the area on the office floor.

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Field	Description
Active	Option to activate the location. This field depends on the **Status** field. If the **Status** is set as **Future** or **Retired**, then the **Active** field is turned off.
Is reservable	Option to indicate whether the space is available for reservation.
Status	Status of the location. ○ If the status of the location is active, select **Active**. If you set the status to **Active**, the **Active** field is enabled. ○ if the location will be available only in the future, select **Future**. If you set the status to **Future**, the **Active** field is turned off. ○ If the location is no longer functional for usage select **Retired**. If you set the status as **Retired**, the **Active** field is turned off. ○ To make the location available only for a temporary duration, select **Temporary**. This space is available when assigned to a user or for any workplace-related activities. The **Active** field is always enabled.
Planned start date	Date for when you are planning to activate or reactivate the location. If the status is set to **Temporary**, then this date is when the location is reactivated.
Planned end date	Date by when you are planning to end the **Future** or **Retired** status of the location.
Actual start date	The date starting when the location should be active.
Actual end date	The date by when the location must be retired.
Space type	Type of the office space. To configure a new space type, see Add a space type configuration.
Space function	The field value is derived from the space type configuration of the space.
BOMA type	BOMA type that you want to associate this space with. If the Space type that you selected is already mapped with a BOMA type, the field is auto-filled with the mapped BOMA type. For more information about BOMA types and to configure a BOMA type, refer to Configure a BOMA type.

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Field	Description
BOMA type overridden	Option to specify the override behaviour when the space type and BOMA type mapping is changed.
Assignment type	Assignment type of the space. Specify if the space is a flexible or a permanent workspace. This field appears only when you select the **Space type** as **Workspace/Desk**.
Managed by group	Group that manages the workplace-related operations.
Managed by	Workplace manager who manages all the workplace-related operations.
Capacity	Capacity of the location. By default, the value is set to 1.
Capacity ratio	Capacity ratio of the location. By default, the value is set to 1. The field signifies the number people the location can accommodate, for example, 1.5,2 etc.
Total capacity	The field is automatically filled and is read-only. The total capacity is calculated as: Total capacity = Capacity * Capacity ratio.
Occupancy status	The occupancy status of the space.
Measurement Details	
Unit	Measuring unit of the size.
Size	Size of the space.
Size Square Feet	Surface area computed in square feet or square meters. Ability to compute surface area automatically in square meters or square feet from the CAD polylines if polylines are defined as closed shapes or if a unit is set. For more information, see Compute CAD file properties to extract space or room surface area.

6. Select **Create QR code** to generate and print QR codes for this space.
7. Select **Unlink Space** to unlink a space from Indoor Mapping map provider.
   For more information about how to link and synchronize Indoor Mapping map data objects with Workplace Indoor Mapping see, Synchronize Indoor Mapping with Workplace Service Delivery.
8. Select **Block location** to define a time period to block these locations for reservation.
9. To add an image to a space, select the Additional Actions icon ( ) to select **View** > **Workplace**.

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a. Select the **Extra Information** tab.

b. Select an **Image** that you want to add to a space and upload it.
The image that you have added is shown on the reservation summary page for a selected space.

10. Click **Submit**.

Result
The space is added to the area. The size of the area and the floor are calculated based on the specified space size.

What to do next
Add an allocation, that is, associate the space to a cost center, department and workplace entity. For more information on how to add an allocation, see Allocate a cost center, department, or workplace entity. In the procedure, select the Spaces module instead of the Floors module.

Configure a space type as usable with Workplace Space Management

Specify if a space type is usable or not by using the Space type configuration functionality. Specify if the space can or cannot be used for reservations.

Before you begin
Ensure that you have the following:

- The space type is configured in the application. Otherwise, refer to Add a space type configuration.
- Workplace Space Management is installed.

Role required: sn_wsd_spcmgmt.manager

About this task
Configure a space type as usable. Specify if the space type can be used for reservations or for any space-related planning. The space type is not usable if it is a storage space or a standalone space that cannot be reserved nor included in space-related activities.

Procedure
1. Navigate to **All** > **Workplace Core** > **Administration** > **Space type configuration**.
2. Select the space type that you want to configure as usable.
3. Open the form in the Space Management view.

   a. Right-click the form header.

   b. Select **View** > **Space Management**.
   The form view changes.

4. Select the **Usable** check box to enable the feature.
5. Click **Update**.

Result
The space type is configured as usable.
The size of all the spaces that are assigned to this space type is calculated in the **Usable size** fields of their areas, floors, and buildings.

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Allocate a cost center, department, or workplace entity

Assign either a cost center, department, or workplace entity to a workplace location. Manage space consumptions, expenses, workplace assignments, and reservations based on an employee cost center, department, or workplace entity.

Before you begin

Important: Starting from Workplace Core version 2.16.1, the allocation type **Department and cost center** is no longer available. A new allocation type **Workplace entity** is introduced that provides more advantages.

Role required: sn_wsd_spcmgmt.manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select the applicable module.
   - Spaces
   - Rooms
   - Areas
   - Floors

   Example

   For example, if you want to allocate a cost center, department or a workplace entity to a floor, select the Floors module.
3. Select the location to which you want to add the allocation.
4. On the form, scroll down and select **New** in the Allocation related list.
5. On the form, fill in the fields.

   Note: The **Start date** and **End date** fields follow the system time zone. Ensure that you fill in the dates in the context of the workplace location.

Allocation form

Field	Description
Type	Option to specify if you want to add a cost center, a department, or a workplace entity.
Cost center	Cost center to which you want to assign the floor. This field appears only when **Cost center** is selected in the **Type** field.
Department	Department to which you want to assign the floor. This field appears only when **Department** is selected in the **Type** field.
Workplace entity	Workplace entity to which you want to assign the space. This field appears only when **Workplace entity** is selected in the **Type** field. A parent entity and its child entity can be allocated to the same workplace location. The start and end date of the child entity

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Field	Description
	must be within the start and end date of the parent entity.
Start date	Date on which the allocation begins. If the start date and end date are not filled, the allocation is considered permanent. If the start date is filled but the end date is not filled, the allocation is considered permanent after the start date.
End date	Date on which the allocation ends. You can set an end date only after setting a start date. After an allocation reaches the end date, the *Deactivate expired allocations* scheduled job sets the allocation record to inactive. When the end date of the allocation is within thirty days, the *Allocation Expiry Notification* scheduled job sends a notification to the following users: ○ User assigned to the **Primary contact** field of the department ○ User assigned to the **Manager** field of the cost center ○ Users assigned to the **Managed by group** or **Managed by** field of the building ○ Users assigned to the **Managed by group** or **Managed by** field of the workplace entity
Allocation Profile	Specify if the allocation is for rent or for ownership. If the allocation is rented, select **Tenant**, otherwise, if the allocation is owned, select **Owner**.
Allocation Percentage	Specify the percentage of the allocation out of 100%. Ensure that the allocated percentage sums up to 100% including other allocations with the same allocation profile of the location. For example, if A and B allocations have **Tenant** as the allocation profile, then the allocation percentage of both A and B's tenancy in total must be 100 %, like 50-50%, or, 25- 75%, or any sum.
Active	Option to activate the allocation.
Location	Location for which you're allocating the cost center, department, or a workplace entity. This field is automatically set to the name

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Field	Description
	of the workplace location to which you're adding the allocation.

6. Select **Submit**.

Result
The allocation is added to the workplace location.
You can assign the allocation to the child locations such as areas, rooms, and spaces. Select the **Push down** option on the Floor or Area form to apply the allocation. The allocation is applied depending on the **Push down** setting specified in the child locations.

Note: For time-bound allocations, only the dates are considered for allocation.

Configure a workspace or desk as flexible or permanent

Define if a space is flexible or permanent. On the Reservation portal, the availability of a space for a user profile depends on its assignment type.

Before you begin
Ensure the following:

- The space is added in the application. Otherwise, refer to Add a space using Workplace Space Management.
- The **Space type** field of the space is set to **Workspace/desk**.

Role required: sn_wsd_spcmgmt.manager

About this task
You can specify if a desk or workspace is a permanent space or flexible. If you set a space as permanent, then the space will not be displayed to employees when they are making a reservation on the portal.

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Spaces**.
3. Select the space that you want to assign as a flexible or permanent space.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
   The form view changes.
5. In the **Assignment type** field, select any one of the following options:
   - **None**: The **Assignment type** is set to **None** by default. The space is available both for reservation on the Reservation portal and for the workplace user profiles created in the Workplace Core application.
   - **Flexible**: Select this option if the space is a flexible workspace. If you select this option, the space is made available for reservation on the Reservation portal. However, the space, as it is set as **Flexible**, cannot be assigned to a user profile as it may cause anomalies. Only **Permanent** spaces can be assigned to a user profile.

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- **Permanent**: Select this option if the space is a permanent workspace. If you select this option, the space is displayed as available only for users created in the Workplace Core application. The space will not be available for reservation on the Reservation portal.

  If you are changing the **Assignment type** from **None** or **Flexible** to **Permanent**, then all the future reservations made on this space will be automatically canceled. A notification is sent about the cancellation.

6. Click **Update**.

Result
The space is configured as flexible or permanent based on the assignment type that you selected.

Update the measurement details of a workplace location

Specify the size of a location. If the location is an area, floor or building, then you can update or recalculate the total and usable size.

Before you begin
Ensure that the space, room, area, floor, or building is active.

Role required: sn_wsd_spcmgmt.manager

Procedure
1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select the applicable module.
   - **Spaces**
   - **Rooms**
   - **Areas**
   - **Floors**
   - **Buildings**

   For example, if you want to update the size of a space, select **Spaces**.
3. Go to the **Measurement details** section and update the measurements.

Measurement details section

Field	Description
Size	Size of the area, floor, or building. This field appears if you selected the Spaces or Rooms module.
Total size	Total size of the area, floor, or building.
Usable size	Usable size of the area, floor, or building.
Measurement unit	Measurement unit that is used to view the sizes. This field is automatically set based on the value selected in the *sn_wsd_spcmgmt.default_area_measurement_un* system property.

4. **Optional:** Recalculate the size.

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Click the recalculate size icon ( ) next to the **Total size** or **Usable size** field.The recalculate size icon appears if you change the sizes manually. If the size of any child location of the selected location changes, the sizes are automatically recalculated.

5. Click **Update**.
6. **Optional:** To recalculate the sizes of multiple workplace locations at a time, do the following:

   a. Select the workplace location module on which you want to perform the recalculation.
   For example, to recalculate the sizes of multiple buildings, go to **Workplace Core** > **Space Administration** > **Buildings**.

   b. Select the locations on which you want to perform recalculation.
   For example, if you are in the Buildings module, select the check box next to each building that you want to recalculate.

   c. **Optional:** Perform recalculation on all the locations at the same time.
   Select the check box on the bottom, next to the **Action on selected rows...** option.

   d. Click **Action on selected rows...**.
   After clicking, do the following:
   - **Recalculate Total Sizes**: Select this option to recalculate the **Total size** of all the locations.
   - **Recalculate Usable Sizes**: Select this option to recalculate the **Usable size** of all the locations.

Result
The size of the workplace location is updated.

Change the status of a workplace location

Change the availability of a workplace location to Active, Future, Temporary, or Retired. The availability of a workplace location for any workplace-related activities is determined based on the status that is set.

Before you begin
Role required: sn_wsd_core.admin

About this task
Set a status for a location. Specify the dates for when the status must be applied. Depending on when you want to plan to set the status, specify a planned start and end date. After you confirm a date for when the status change must be applied, specify the actual start and end date.

- You can specify the status for Campus and below hierarchy locations. The status changes are applied from higher to lower hierarchy.
- The status change is applied to only those child locations that have the same status. For example, if you have changed the status of a floor from **Active** to **Future**, then the status of only those rooms of that floor that have the status as **Active** are changed to **Future**. If there are rooms that have the status as **Temporary**, **Future** or **Retired**, then their status remains unchanged. The status change is applied the same way to child workplace locations, that is to the spaces of that room.
- If you change the status of a location to **Future** or **Retired**, then the **Active** field is turned off and that location is unavailable for any workplace-related activities.
- When you create a record for a workplace location, the **Status**, **Planned start date**, **Planned end date**, **Actual start date**, and **Actual end date** fields are automatically filled with the parent location's field values of that location.

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- The **Planned start date** and **Planned end date** must be on or between the **Planned start date** and **Planned end date** fields of the parent location.
- If there are any child locations that are currently reserved, have an active workplace case, or are assigned as a permanent location to a user, you cannot change the status of a location from **Active** to either **Future** or **Retired**.
- If you change the status of a location to **Future** or **Retired**, employees cannot reserve that location and any of its child locations. The locations are not displayed to employees while making a reservation. If an employee sets any one of the locations as the employee's favorite, then the **Reserve** option for that location is turned off in the employee's My favorites page.
- If the status of any of the child locations is **Active** or **Temporary**, then the status of its parent location cannot be changed to **Future** or **Retired**. For example, if a space is **Active** or **Temporary**, you cannot change the status of the Floor to **Future** or **Retired**.

Procedure

1. Navigate to **All** > **Workplace Core** > **Space Administration**.
2. Select **Spaces**.
3. Click **New**.
4. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
   The form view changes.
5. Change the status in the **Status** field.
6. Select the **Planned start date** for when you are planning to activate/reactivate the location.
7. Select the **Planned end date** by when you are planning to retire the location.
8. Select the **Actual start date** for when the location is active.
9. Select the **Actual end date** on which the location must be retired.
10. Click **Update**.

Result

The status of the location is changed and applied to all the child locations.

A schedule job runs every month and a reminder email is sent to the workplace managers regarding the activation or retirement of locations. The managers must manually change the status of the locations that are listed in the email.

- The reminder email includes information regarding the locations that require activation based on the **Planned start date**. The email also includes the locations that require retirement based on the **Actual end date**.
- Apart from the monthly emails, reminder emails regarding the location activation or retirement are sent on the following days:
  - For activation:
    - One week before the **Planned start date**.
    - On the **Planned start date**.
  - For retirement:
    - One week before the **Actual end date**.
    - On the **Actual start date**.

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Configure a BOMA type

Define a BOMA type using which you can classify a space based on its BOMA standard.

Before you begin

Ensure that Workplace Space Management application is installed.

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

About this task

Classify a space based on Building Owners and Managers Association (BOMA) standards. Based on the BOMA type of a space, the organization derives what type of a space it is, plans real-estate, calculates chargebacks, performs vendor management and more. Similar to Workplace Core Space type configuration, additionally, you can categorize a space with respect to the BOMA standard and map both.

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **BOMA type configuration**.
2. Click **New**.
3. On the BOMA type form, enter a **Name** for the BOMA type.
4. Select **Active** to activate the BOMA type.
5. Click **Submit**.

Result

The BOMA type is configured. To map the BOMA type with a Space type, refer to Map a space type with BOMA type.

Map a space type with BOMA type

Using Workplace Space Management, map a space type that you created using Workplace Core with a BOMA type.

Before you begin

Ensure the following:

- Space type is configured. To configure a space type, refer to Add a space type configuration.
- BOMA type is configured. To configure a BOMA type, refer to Configure a BOMA type.

Role required: sn_wsd_core.admin and sn_wsd_spcmgmt.manager

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Space type configuration**.
2. Select the space type that you map with BOMA type.
3. Open the form in the Space Management view.
   a. Right-click the form header.
   b. Select **View** > **Space Management**.
      The form view changes.
4. In the **BOMA type** field, select the BOMA type with which you want to map the space type.
5. Click **Update**.

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Result
The space type is mapped with a BOMA type. All the spaces that are assigned to this space type, will be classified with the selected BOMA type.

Create a Space Recommender rule

Define a space recommender rule using which the qualifying spaces must be calculated when a user raises a space assistance request using Workplace Service Portal. You must have Workplace Central plugin.

Before you begin
Ensure the following:

- Workplace Central plugin is installed.
- Workplace Case Management is installed.
- Workplace Core is installed.

Role required: sn_wsd_core.admin

About this task
Create space recommender rules and specify the type of rule based on which space results must be calculated. Rule types such as Condition, Advanced script, Ignore blocked spaces and Proximity are available to set for a rule.

Procedure
1. Navigate to **All** > **Workplace Core** > **Administration** > **Space Recommender Rules**.
2. Select **New**.
3. On the form, fill in the fields.

Space Recommender Rule form

Field	Description
Rule name	Name of the rule.
Rule type	Type of rule. Select any one of the following options: ○ **Condition**: Option to set the rule with conditions. You can select the table on which you want to set the conditions and add conditions that must be met in the rule. ○ **Advanced script**:Option to configure a script to run on the Space table. Ensure that the script returns a query on the Space table. ○ **Ignore blocked spaces**: Option to set the rule to ignore blocked spaces while recommending spaces. By default, the option is set to **Ignore blocked spaces**. ○ **Proximity**: Option to set the rule that the space must be of exact proximity with the specified Cost center or Department. You can specify the location level where you want to implement the proximity.

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Field	Description
Active	Option to activate the rule.
Condition **Note:** This tab appears only if you select **Condition** in the **Rule type** field.	
Condition table	Table on which you want to run the conditions.
Conditions	Conditions that you want to run on the table. Select **New criteria** to add multiple conditions.
Script **Note:** This tab appears only if you select **Advanced script** in the **Rule type** field.	
Script	Script that you want to run on the Space table. The script will run on the table and return qualifying spaces. Ensure that the scripts returns a query on the Space table.
Proximity	
Proximity at	Select the location level where the proximity must be implemented.

4. Click **Submit**

Result
The Space recommender rule is created.

What to do next
Add space recommender rules to a space recommender rule set

Configure a Space Recommender Rule set

Create a space recommender rule set consisting multiple rules. The rule set calculates the qualifying spaces when a user submits a space assistance request using the Workplace Service Portal. You must have Workplace Central plugin.

Before you begin
Ensure the following:

- Workplace Central plugin is installed.
- Workplace Case Management is installed.
- Workplace Core is installed.

Role required: sn_wsd_core.admin

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About this task

The Space Recommender Rule Set is a collection of space recommender rules based on which the spaces are qualified. By default, the **Space Recommendations Default Rule Set** is used to result qualifying spaces when a space assistance request is submitted.

If you are creating a new rule set, in order for the exact match action to work on the space assistance request, the rules that you add in the new rule set must also have the rules that are added in the **Space Recommendations Default Rule Set**. The **Rule type** of the rules must be **Advanced script**. You can refer to existing default rule set for more information on how the advanced script is configured to work with the exact match action.

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Space Recommender Rule sets**.
2. Select **New**.
3. On the form, fill in the fields.

Space Recommender Rule sets form

Field	Description
Rule Set Name	Name of the rule set.
Description	Description of the rule set.
Result Configuration	Option to specify based on which location level the resultant spaces must be displayed. Specify whether spaces of same floor, same building or same campus must be displayed.
Active	Option to activate the rule set.
Order	Order of implementation. The rule set with the lowest order is applied.
Condition table	Table on which you want to apply the conditions. By default, the Workplace Case table is selected.
Condition	Conditions that you want to apply on the selected **Condition table**. To add conditions, select **New Criteria**.

4. Click **Submit**.

Result

The Space Recommender Rule set is created.

What to do next

Create a Space Recommender rule

Add space recommender rules to a space recommender rule set

Add rules to a space recommender rule set based on which qualifying spaces must be calculated when a space assistance request is raised using the Workplace Service Portal. A rule set is a collection of rules.

Before you begin

Ensure the following:

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- Workplace Case Management is installed.
- Workplace Core is installed.
- Space recommender rules are already created. Otherwise, Create a Space Recommender rule.
- Space recommender rule set is already created. Otherwise, Configure a Space Recommender Rule set.

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Space Recommender Rule sets**.
2. Select the space recommender rule set to which you want to add the rule.
3. On the form, scroll down to the Space Recommender Rules related list.
4. Click **Edit...**.
5. On the Edit members form, set the filter option **Active** to **True**.
6. Select the rules by doing the following:

   a. Select the rules from the **Collection** column on the left.

   b. Move the selection to the **Space Recommender Rules List** column on the right.

   To move the rule, use the add/remove icon ( ).

   c. Click **Save**.

Result

The space recommender rule is added to the selected space recommender rule set.

Raise a space assistance request

Submit a workplace service request to get space allocation recommendations using the Workplace Service Portal. The Workplace Service Delivery space assistance provides you with the best space allocation plan options based on the space quantity and the department that you specify. You can select the most suitable allocation or none. Depending on your selection, the Space planner deploys the plan to use.

Before you begin

Ensure the following:

- Workplace Central plugin is installed.
- Workplace Case Management plugin is installed.
- To view the space recommendations on the map, the floor map must be configured using Workplace Indoor Mapping.

Role required: sn_wsd_core.workplace_user

About this task

Specify the department and number of spaces that you want to assign to that department on a floor. Specify the location where you want to see the allocation recommendation. Depending on the specification submitted on the form, the system provides you with options containing the most suitable space allocation plans in that building. If the selected department exists on the floor that you selected, then the spaces are recommended nearby to that department.

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You can select the best option and submit the selection. If an approval is configured, then the plan is sent for an approval to your manager. The selected space plan is directed to the space planner. The space planner reviews the plan and deploys it accordingly.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. Open the General category.
   a. Select **Catalog**.
   b. Select **Browse by Categories**.
   c. In the Workplace Services Catalog, select **General**.

   Note: If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.
3. Select **Space assist request**.
4. On the form, fill in the fields.

Space assist request form

Field	Description
Request name	Descriptive name for the request.
Allocate space by	The allocation type is set with the default allocation type set by your administrator. **Note:** If there is no allocation type specified, then you cannot proceed with the request.
Requested for	Option to specify the user for whom you are raising the space assistance request.
Select a department	Department based on which you want to allocate spaces. This option appears if **Department** is set in the **Allocate space by** field.
Select a Cost center	Cost center based on which you want to allocate spaces. This option appears only appears if **Cost center** is set in the **Allocate space by** field.
Select a workplace entity type	Workplace entity type based on which you want to allocate spaces. This option appears if **Workplace Entity** is set in the **Allocate space by** field.
Select a workplace entity	Workplace entity based on which you want to allocate spaces. This option appears if **Workplace Entity** is set in the **Allocate space by** field.

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Field	Description
Reason for request	Option to select the reason for the request.
Space type	Option to specify what type of spaces you want.
Exact match (Space type)	Option to confirm that you want to see only the spaces that are an exact match to the selected space type.
Assignment type	Option to specify if you want flexible or permanent spaces.
Quantity/Capacity	Number of spaces that you want to allocate.
Region	Region where you want to make space allocation.
Campus	Campus where you want to make space allocation.
Site	Site where you want to make space allocation.
Building	Building where you want to make space allocation.
Exact match (Building)	Option to confirm that you want see only the spaces that are an exact match to the selected building.
Move-in date	Option to specify the date from when you want to implement the space allocation.
Exact match (Move-in date)	Option to confirm that you want see only the spaces that are available on the selected move-in date. This option is not available from Workplace Space Management version 1.12.0.
Move-out date	Option to specify the date until when you want to allocate the spaces.
Exact match (Move-out date)	Option to confirm that you want see only the spaces that are available until the selected move-out date. This option is not available from Workplace Space Management version 1.12.0.
Add attachments	Option to attach any supporting files if necessary.

5. Select **Submit**.
   The request is submitted. After the submission, the request details page is opened.
6. In the My request page, select **Space plans**.
   Refresh the page to view space plan options.
   The page displays options that have the most suitable space allocations for the select cost center or department on the selected floor, along with the match percentage.

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7. Review the options that are displayed.
   The match percentage is displayed under each option.
8. **Optional:** View the space allocations on the map by selecting **View spaces on map**.

   Note: You can view the space allocations on the map only if the floor has a floor map configured.

9. Select an option from the provided options.

   a. In the My request page, select **Tasks/To-dos**.

   b. In the **Select a space plan option**, select **View task**.
   A page with all the options that are displayed in the **Space plan** is displayed for selection.

   c. Select **Select** next to the option that you want to proceed with.

   d. **Optional:** If you do not want to select any option for any reason, select **None of the above**.

   Note: If you select **None of the above**, the request is closed and the state will be set to **Closed complete**

   e. After selection, select **Submit**.

Result

The option that you selected is submitted. At any time, you can view your selected option in the **Space plans** tab. After you submit the selection, the following actions are performed based on the approval process configured by your organization:

- If an approval process is configured for your user profile, then the space request is sent to your manager for approval. The state of the space request changes to Awaiting approval.
  - If your manager approves, the space request is sent for deployment and the state changes to Approved.
  - If your manager rejects, then the space request is rejected and the state changes to Closed incomplete.
- If your user profile doesn't require an approval, then the space request is transferred to your organization's space planner and the state changes to **Approved.**

Create a view-by configuration

Create a configuration to filter the view of the scenario planner or building overview.

Before you begin

Role required: sn_wsd_spcmgmt.admin

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **View-by Settings Configuration**
2. On the View by Configurations list, select **New**.
3. On the View by Configuration form, fill in the fields.
   For a description of the field values, see View by Configuration form.
4. Select **Submit**.

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Reviewing allocation changes

Review allocation changes in the Space Allocation Type Change Tracker table to plan changes for your scenarios.

The Space Allocation Type Change Tracker [sn_wsd_spcmgmt_space_allocation_type_change_tracker] table contains information about allocation changes in your workplace.

You can review the table columns for information about the type of allocation changes.

After you review the allocation changes, you can make changes to your scenario. For example, if the parent of a workplace entity is changed, you can move the existing spaces to the previous parent and allocate spaces from the new parent. If a cost center or department is deleted or made inactive, you can remove the allocations from your scenario.

Space Allocation Type Change Tracker columns

Column	Description
Type of change	Type of allocation change made on the workplace. **Inactive** The allocation was made inactive. **Deleted** The allocation was deleted. **Reparent** The parent of the workplace entity was changed.
Cost center	The cost center that is impacted by the change.
Department	The department that is impacted by the change.
Neighborhood	The neighborhood that is impacted by the change.
Workplace Entity	The workplace entity that is impacted by the change.
Deleted record ID	Sys ID of the allocation record that was deleted. This field is filled only if the type of change is **Deleted**.
Domain	Domain in which the allocation was changed.
Parent table	Table in which the type of allocation is stored in.
Previous parent	Previous parent of the workplace entity. This field is applicable for workplace entities and filled only if the type of change is **Reparent**.

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Managing neighborhoods

Neighborhood is moved from Workplace Space Management version 1.17.0 to Workplace Core version 2.23.2.

Note: When upgrading from a previous version to the current version, the Migrate Neighborhood to Core fix script transfers data from the old tables to the new tables.

Refer to Managing Neighborhoods for more information about neighborhoods.

Workplace Space Management references

Several components and properties are installed with Workplace Space Management.

Components installed with Workplace Space Management

Several types of components are installed with the Workplace Space Management application, including tables and user roles.

Demo data is available for this feature.

Roles installed with Workplace Space Management

Roles for Workplace Space Management

Role title [name]	Description	Contains roles
sn_wsd_spcmgmt.admin	As a Workplace Space Management admin, you can access the application completely.	sn_wsd_spcmgmt.manager
sn_wsd_spcmgmt.manager	As a Workplace Space Manager, you can access the application completely.	None
sn_wsd_spcmgmt.space_planner	As a workplace space planner, you can create a scenario and deploy it	• sn_wsd_core.task_reader • sn_wsd_move.reader • sn_wsd_core.task_reader • sn_wsd_core.profile_writer • sn_wsd_central.workspace_user • view_changer • sn_wsd_spcmgmt.manager • sn_wsd_core.location_writer
sn_wsd_spcmgmt.scenario_reader	As a workplace scenario reader, you can view scenarios in a read-only mode.	sn_wsd_central.workspace_user
sn_wsd_spcmgmt.schedule_plan_reader	As a Schedule Plan reader, you can view schedule plans in the read-only mode.	None
sn_wsd_spcmgmt.schedule_plan_writer	As a Schedule Plan writer, you can create and edit schedule plans.	sn_wsd_spcmgmt.schedule_plan_reader

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Roles for Workplace Space Management (continued)

Role title [name]	Description	Contains roles
sn_wsd_spcmgmt.project_owner	As a Project Owner, you can create and manage Schedule Plans.	• sn_wsd_spcmgmt.schedule_plan_writer • sn_wsd_core.workplace_user • sn_wsd_core.task_reader • sn_wsd_core.profile_reader • sn_wsd_core.location_reader • sn_wsd_central.workspace_user • sn_wsd_core.shift_reader

Tables installed with Workplace Space Management

Note: Neighborhood is moved from Workplace Space Management [version] to Workplace Core [version]. For more information, see Components installed with Workplace Core.

Tables for Workplace Space Management

Table	Description
Allocation [sn_wsd_spcmgmt_location_cc_dept_map]	Stores information about all the cost centers and departments that are created in the application.
Workplace Location Status Tracker [sn_wsd_spcmgmt_location_status_tracker]	Stores information about all the status changes of the locations.
Neighborhood [sn_wsd_spcmgmt_neighborhood]	Stores information about a neighborhood allocated to a cost center, department, or a group. This table is deprecated from Workplace Space Management version 1.17.0.
Neighborhood user assignment rule [sn_wsd_spcmgmt_neighborhood_user_assignment]	Stores information about neighborhood user assignment rule to create and add new users to a neighborhood. This table is deprecated from Workplace Space Management version 1.17.0.
Neighborhood space [sn_wsd_spcmgmt_neighborhood_m2m_space]	Stores information about a neighborhood space. This table is deprecated from Workplace Space Management version 1.17.0.
View by Configuration [sn_wsd_spcmgmt_view_by_configuration]	Stores information about the view by configurations created for Scenario Planning or Building Overview.

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Tables for Workplace Space Management (continued)

Table	Description
Schedule Plan [sn_wsd_spcmgmt_schedule_plan]	Stores information such as the start date, end date, and the selected schedule for Schedule Plans.
Schedule Plan Space [sn_wsd_spcmgmt_schedule_plan_space]	Stores information about the workspaces selected for Schedule Plans.
Schedule Plan User [sn_wsd_spcmgmt_schedule_plan_user]	Stores information about the users selected for Schedule Plans.
Schedule Plan User Space [sn_wsd_spcmgmt_schedule_plan_user_space]	Stores information about the user to space mapping and validation issues for Schedule Plans.
Space Allocation Type Change Tracker [sn_wsd_spcmgmt_space_allocation_type_change_tracker]	Stores information about changes made to types of allocation, which can be reviewed to plan and edit scenarios.

Properties installed with Workplace Space Management

Customize the properties available with Workplace Space Management.

These properties are available for Workplace Space Management.

Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Space Management

Property	Description
sn_wsd_spcmgmt.default_area_measurement_unit	This property enables you to specify the default measuring unit of an area. • Type: choice list • Choices: **sq_feet**, **sq_meter** • Default value: **sq_feet**

View by Configuration form

The view by configuration form helps you select the table and field used to filter the view on the scenario planner or building overview.

View by Configuration form

Field	Description
Title	Title of the view by configuration that is displayed on the scenario planner or building overview.

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View by Configuration form (continued)

Field	Description
View by table	Table that contains the field you want to use for the view by configuration. The following tables are supported for view-by configurations: • Scenario Plan Space Detail [sn_wsd_spcmgmt_scenario_plan_space_detail] • Space [sn_wsd_core_space] • Space Detail [sn_wsd_spcmgmt_space_detail]
View by field	Field that is used to filter the view of the scenario planner or building overview. You can dot-walk to a maximum of two fields. You can only select fields that are of the reference, choice, or true/false type.
Active	Option to activate the record.
Application	Application that the record is created in. This field is automatically set to Workplace Space Management and can't be edited.
Mode	Mode where the view by configuration is enabled. **Note:** • Building overview is not supported for the Scenario Plan Space Detail [sn_wsd_spcmgmt_scenario_plan_space_detail] table. • Scenario planning is not supported for the Space Detail [sn_wsd_spcmgmt_space_detail] table.
Order	Order of the view by configuration in the drop-down list of the scenario planner or building overview.
Domain	Domain for the view by configuration. This field is automatically set to global.

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Workplace Maintenance Management

Workplace Maintenance Management provides preventive maintenance plans for enterprise assets and workplace locations. Maintenance managers can perform maintenance planning for workplace services.

Get started

Explore



Learn about Workplace Maintenance Management concepts and features

Configure



Install and Configure Workplace Maintenance Management

Manage



Manage Workplace Maintenance Management location records

References



Learn about Workplace Maintenance Management roles, properties, and components

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Workplace Maintenance Management

Workplace administrators and managers can create maintenance plans for preventive maintenance. Create duration or meter-based schedules for locations or assets. Associate different templates to your plan records to create maintenance cases.

You can create and manage maintenance plans for workplace models (assets) and location (spaces). Preventive maintenance cases are created in response to time elapsed or measured usage of an asset. For example: Coffee machines, elevators, lighting, and furniture.

Publish your maintenance plans and automate schedules to create maintenance cases for plan records. Maintenance cases are created in response to workplace issues where remedial work is required. For example: coffee spills, broken furniture, and so on.

Workplace agents are assigned maintenance cases to act on scheduled cases. Workplace agents can create, view, update, and delete maintenance cases.

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Benefits

Administrators and workplace managers can perform the following:

- Create maintenance plans for workplace models (assets) and workplace locations.
- Create schedules or copy an existing schedule for a maintenance plan.
- Create duration-based or meter-based schedules.
- Associate a template (Workplace service) to a plan record, maintenance plan, asset, or location. You can construct any condition on the Workplace Maintenance Service Configuration (sn_wsd_maintenance_service_config) table, and the template is assigned to a maintenance case when a condition is satisfied. Associate multiple templates across maintenance plans and also within maintenance plans.

  For example, maintenance plans created for printers for a location use Template A. Similarly, maintenance plans for office desks use Template B. To achieve further granularity within maintenance plans, you can assign different templates for different printer types or model types (HP, Cannon, and so on). You can also use a different template for different maintenance schedules (daily, weekly, quarterly, and so on).
- Schedule job checks for an associated template and creates maintenance cases. It also pre-creates maintenance cases for plan records whose schedule is less than a day.
- Track and monitor maintenance plan records and maintenance cases on Workplace Central.
- Analyze metrics and trends to show preventive maintenance cases versus corrective maintenance cases. Administrators and workplace managers can take appropriate measures to reduce corrective maintenance issues. For example, sudden outages and printer breakdown. Create maintenance plans for your models and assets to reduce the volume of corrective cases. For more information, see Workplace Maintenance Management dashboard and analytics.

Configuring Maintenance Management

Install and configure Workplace Maintenance Management for creating and managing workplace maintenance plans.

Install Workplace Maintenance Management

Install the Workplace Maintenance Management (application from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Installing Workplace Maintenance Management (sn_wsd_maintenance) activates/installs the following:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.
2. Verify that the following plugins are activated:
   - Workplace Core (sn_wsd_core)
   - Workplace Central (sn_wsd_central)
   - Enterprise Model and Asset Classes (sn_ent)

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- Workplace Case Management (sn_wsd_case)
- Workplace Move Management

Use the following details when required:

- Name of the application: Workplace Maintenance Management
- ID of the application: sn_wsd_maintenance

Role required: sn_wsd_maintenance.admin

About this task

Note: Activate Workplace Central plugin (sn_wsd_central) and ensure you have the role sn_wsd_maintenance.admin assigned.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.

   Search for the application by its name (Workplace Maintenance Management or ID [sn_wsd_maintenance]). If you cannot find the application, you may have to request it from the ServiceNow Store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you install Workplace Maintenance Management.

Result

Workplace Maintenance Management is installed.

Manage Workplace Maintenance Management plans

Manage Workplace Maintenance plans for workplace models (assets) and workplace locations.

Workplace users (sn_wsd-central.workspace_user) can access the Preventive Maintenance tab on Workplace Central.

Role: sn_wsd_maintenance.admin and sn_wsd_maintenance.manager.

Create and publish maintenance plans

Create a maintenance plan for workplace assets and locations. Associate multiple services to different plan records based on the type of workplace maintenance activity.

Before you begin

Ensure that the following plugins are installed:

- Workplace Central
- Enterprise Model and Asset Classes (sn_ent)
- Workplace Service Delivery
- Workplace Core

Role required: sn_wsd_maintenance.manager, sn_wsd_maint.admin

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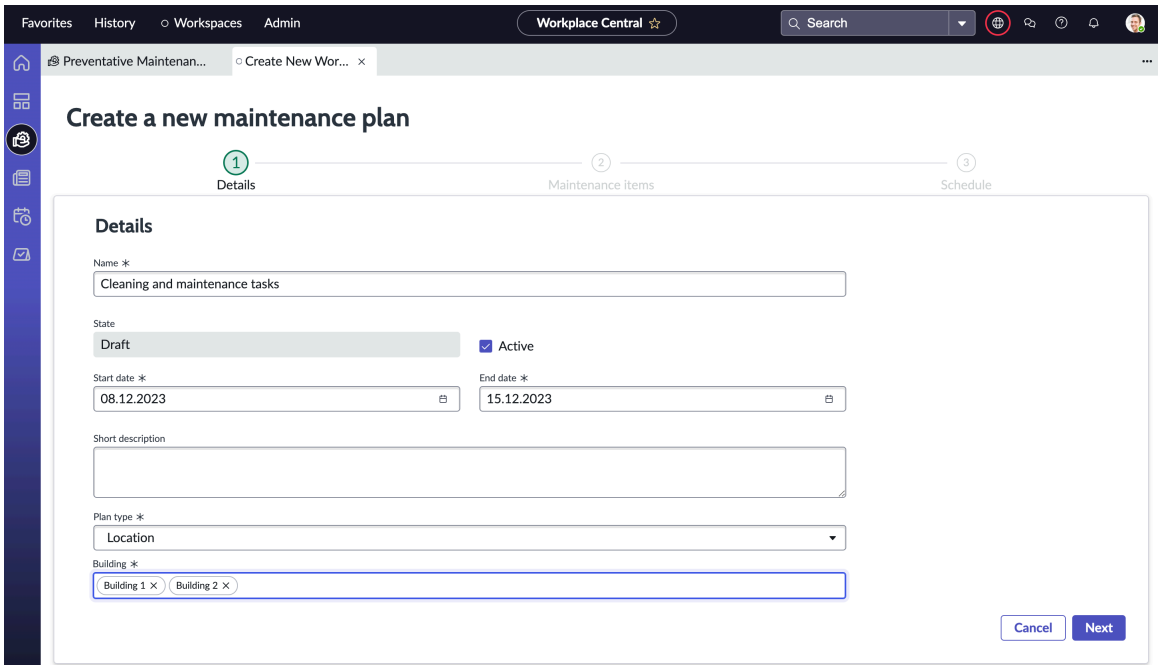
About this task

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select the **Preventative Maintenance** tab icon ( ).
3. Select **All plans** > **New** on the home page.



4. On the form, fill in the fields.

Create a maintenance plan

Field	Description
Name	Title of the maintenance plan.
State	All maintenance plans start in a Draft state by default
Active	The active check mark is selected by default.
Start date	The start date of a maintenance plan. Select a date and select **OK**.
End date	The end date of a maintenance plan. Select a date and select **OK**.
Plan type	Enterprise assets (models) and workplace spaces (locations or buildings). Select **Model** or **Location** from the drop-down list. Models: List of enterprise models or assets that need maintenance. For example, printers, coffee machines, fire extinguishers, and so on.

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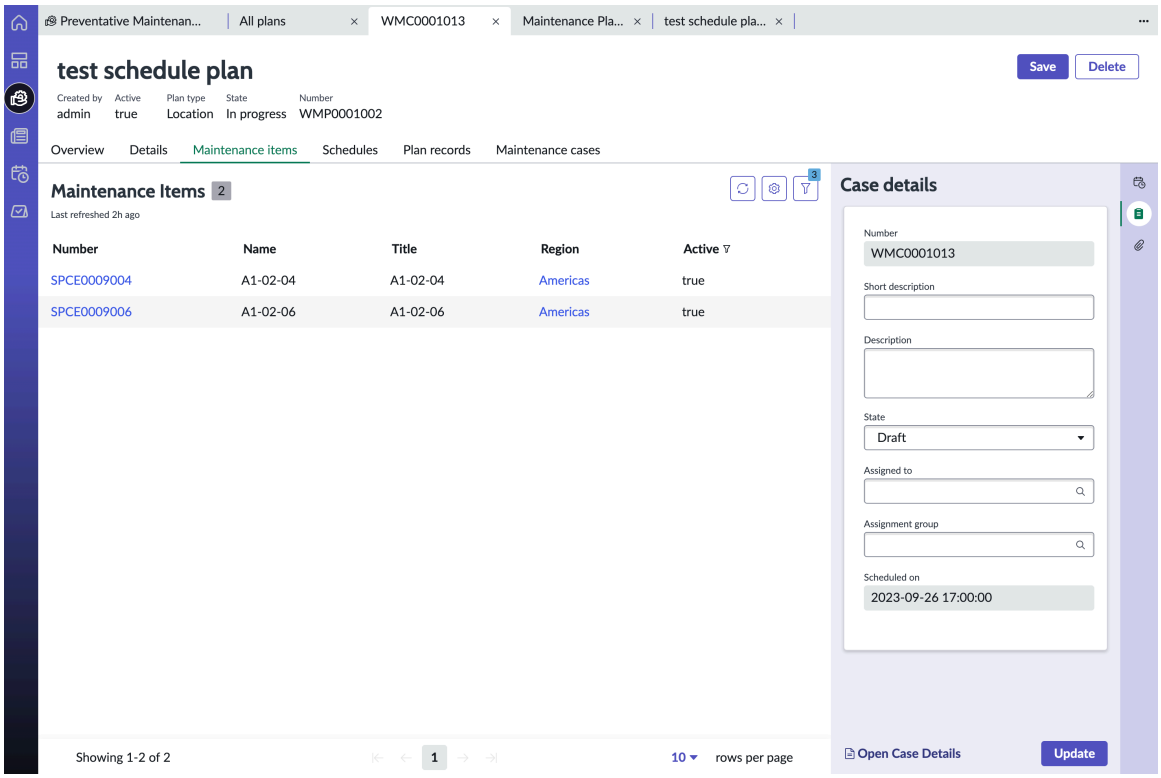
Field	Description
	Locations: Option to select a Workplace location (sn_wsd_core_workplace_location). Select a building from the list of buildings.
Model/Building	Select assets or locations. If the selected building or model doesn't show a maintenance item, select **Go back** to select another asset or location. Based on your selection in the **Plan type** field, different options for locations or assets are displayed. If you have selected **Model**, then assets or models are available for you to select. if you have selected **Location**, then**Buildings** are available for selection. For example: Select **Building B**.

5. Select **Next**.
6. The maintenance items for a selected location or model are filtered based on your selection of a model or location in Step 4.



Select one or more maintenance items.

If you've selected a building in step 4, the floors, spaces, and areas associated with that building are displayed and included as part of the maintenance item.

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7. Select **Go back** to make updates or edits on the maintenance details page.
8. Select **Next**.

   The new maintenance plan is saved in a **Draft** state.

   The maintenance items go to the next step for scheduling.
9. **Optional:** Select **Create a schedule** or **Copy a schedule** from the drop-down list.

   (Optional) Select the **Skip scheduling** option if you don't want to create a schedule now and prefer to create it later. After publishing a maintenance plan, you can create a schedule or copy an existing schedule for a plan.

   For more information, see Create or copy a maintenance schedule. For more information about how the scheduled job creates maintenance cases for a plan record, see Workplace planned maintenance scheduled job.
10. Select **Save**.
11. Select **Publish**.
    The maintenance plan is published. A contextual sidebar is available for you to search for schedules, view workplace maintenance case details, and view attachments for a plan.

    Note: The **Publish** option is not available when you select **Skip Scheduling**. You must open the maintenance plan again separately and select **Publish** to publish the plan.

    The published maintenance plan is available for you to view in a calendar view. For more information, see Maintenance plan calendar view.
12. Review the maintenance plan details on the calendar view.
    Status of the maintenance plan moves to the **In progress** state. For more information about the calendar view, see Maintenance plan calendar view.

    The **Schedules tab** shows the **Next run time** for a scheduled job. The scheduled job **Workplace Maintenance Nightly run** runs every 48 hours (2 days) and creates maintenance cases for active plan records. For more information, see Workplace planned maintenance scheduled job.

Maintenance plan calendar view

After publishing a maintenance plan, the plan opens in a calendar view. The calendar view shows the plan details, maintenance items, schedules, plan records, and maintenance cases for a selected plan record.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Preventative Maintenance** tab and select **All Plans**.
3. Click open an existing plan to view the published maintenance plan in a calendar view.
   The calendar view page is displayed by default when you publish a maintenance plan.
4. The **Overview** tab shows a weekly calendar for a selected plan record.

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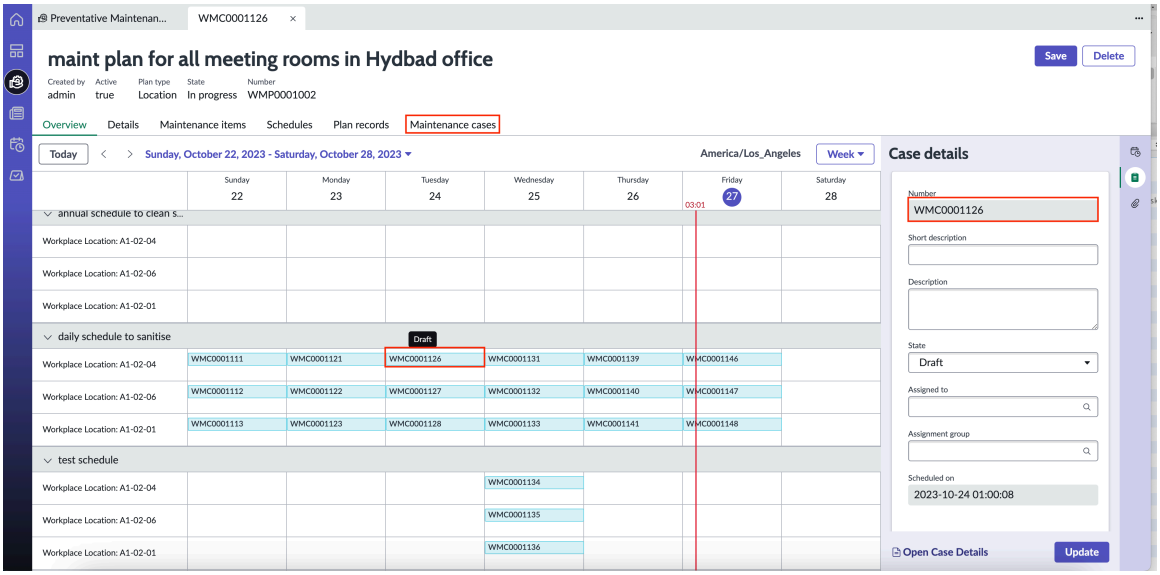
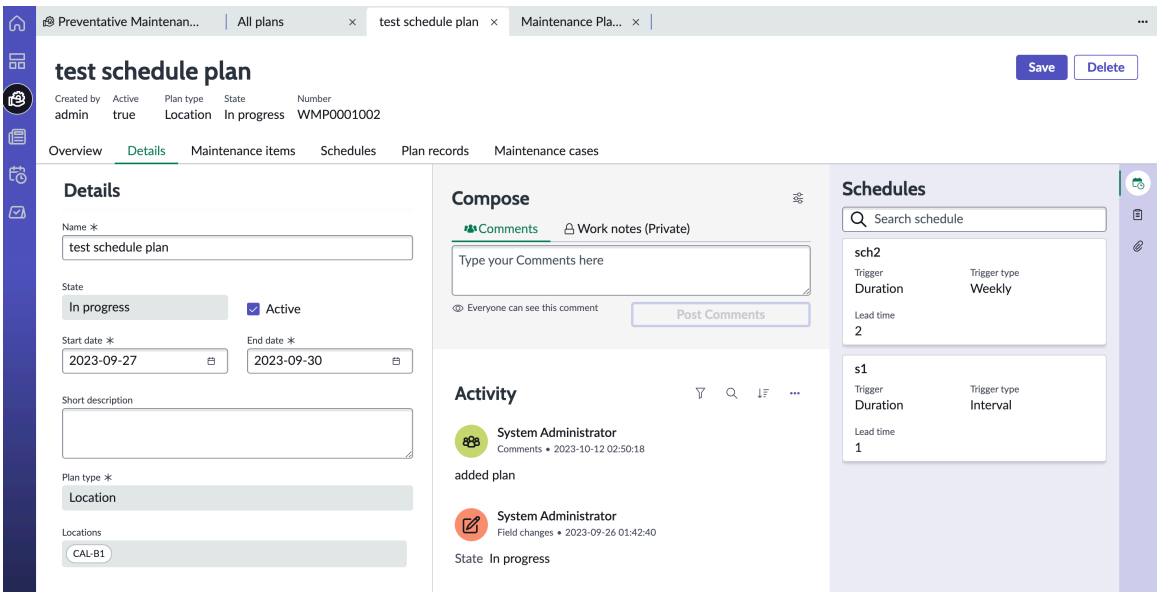


Note: The Overview tab currently supports the weekly view and the current system time zone.

5. Click open the **Details** tab.

The **Details** tab shows the state of the maintenance plan. Changes can be made to the maintenance plan state to reflect whether the maintenance plan is in Draft, In progress, or Active state. Work notes can be created but are only visible to a workplace manager or administrator creating the maintenance plan.



a. Name: Name of the Workplace Maintenance Plan.

b. Active: Plan is active.

c. Start date: Start date of the scheduled maintenance plan.

d. End date: The end date is when the scheduled maintenance plan ends.

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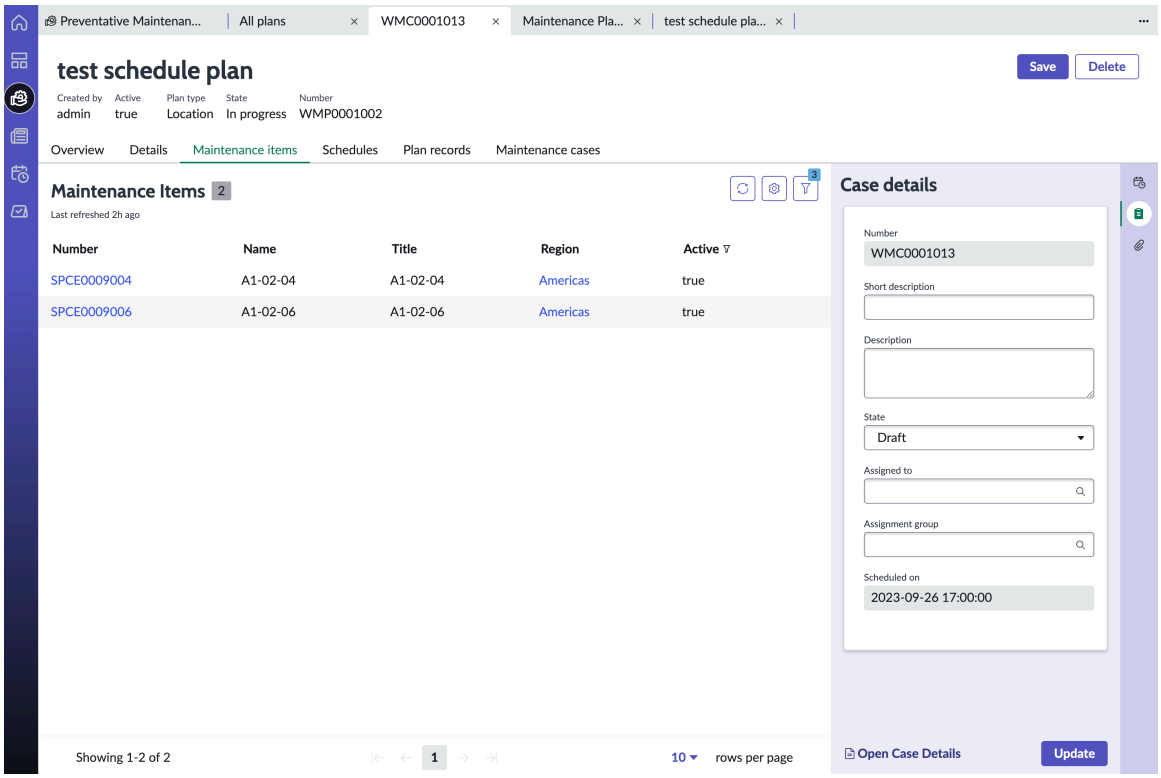
e. Compose:

- Comments: Option to add comments for Workplace Managers.
- Work notes Private: Private work notes.

f. Activity: Activity initiated on a Workplace maintenance plan.

g. Schedules: Search for schedules.

6. Select open the **Maintenance items** tab to view maintenance items that you added in the plan type (location or asset) field while creating a maintenance plan.



a. Select the record number for a maintenance item (for example, SPCE0009004) to view details for the Workplace Core Space form.

Floors, spaces, and areas associated for a selected building are displayed as part of the maintenance items.

b. Case Details panel on the right shows the Workplace Case Management case ID number.

- State: Indicates status of a maintenance case.
- Assigned to: Indicates the user assigned to a workplace maintenance case.
- Assignment group: Indicates user group assigned to a workplace maintenance plan case.

For more information, see Workplace maintenance cases.

7. **Optional:** If you selected **Skip Scheduling** while creating the plan, you can publish the plan here using the **Publish** option.

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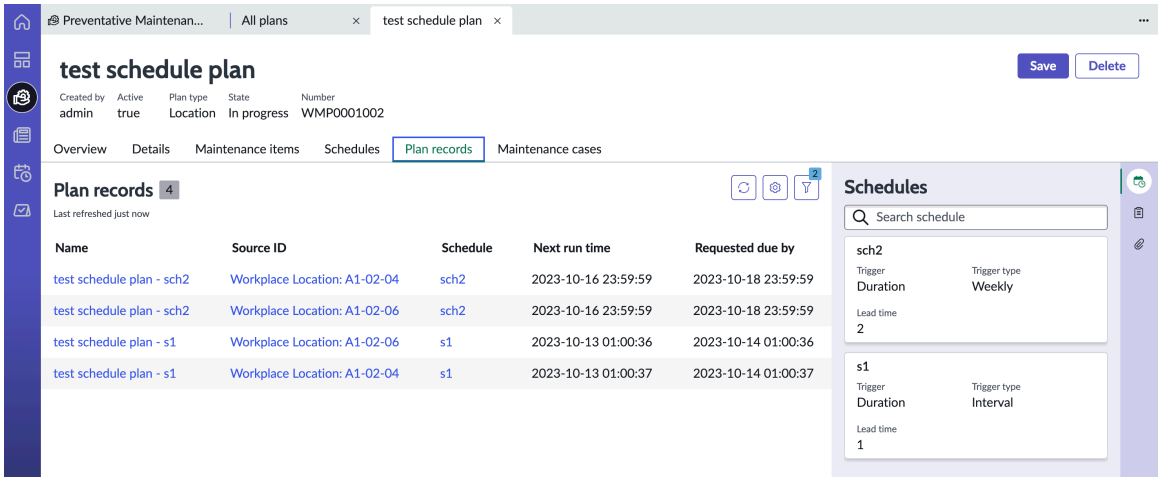
Note: The **Publish** option is not available when you select **Skip Scheduling** while creation.

8. To view the schedule plan for a maintenance record, click the **Schedules** tab.
   You also have the option to create or copy a schedule. For more information, see Create or copy a maintenance schedule.
9. Select **Plan records**.



Plan records page shows the following pre-filled values:

Plan records

Column	Description
Name	Schedule name for a maintenance item.
Source ID	The items associated with the maintenance plan record.
Schedule	Link to the schedule details.
Requested due by	Maintenance plan schedule date.
Next run value	The schedule job run time for a maintenance plan record.
Last completion time	Scheduled job run time completion.

10. Select **Maintenance cases** tab.

    The workplace Maintenance cases are created only if the corresponding plan record can pick a template by satisfying a condition in the Workplace Maintenance Service Configuration (sn_wsd_maintenance_service_config) table. You can construct any condition on the Workplace Maintenance Service Configuration table, and the template is assigned to a maintenance case when a condition is satisfied. For more information, see Create plan service configuration.

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Maintenance cases

Column	Description
Number	Case ID for a maintenance case. It is linked to the case details, schedules, and attachments.
Short description	Description of a maintenance plan.
State	Status of a maintenance item.
Scheduled on	The date on which the maintenance case is scheduled to run.
Scheduled value	The value is equal to the time (days) which the schedule is set to run.
Assigned to	The name of the user in the case is assigned to (set by the manager).
Assignment group	The user group assigned to a case and is set by a workplace manager or workplace administrator.
Opened	The date on which the case was opened.

A contextual sidebar is available on the right page for Schedules, Case details, and Attachments. You can search for schedules, update case details, and add attachments to workplace maintenance plans.

11. Select **Save.**

Create or copy a maintenance schedule

After creating a maintenance plan, define a maintenance schedule for a maintenance plan. Define duration or meter-based schedules for your assets or locations on a daily, weekly, monthly, or yearly basis.

Before you begin

Role required: admin

About this task

Maintenance schedules are duration or meter based. For example, on the Maintenance Schedule form, select Duration or Meter as the trigger for replacing a printer ink cartridge. Define the maintenance schedule duration as three months and the paper sheets as 10,000. The schedule is triggered when the paper sheets need refill and the printer ink cartridges are replaced based on this trigger. The maintenance schedule populates the **Next run time** (duration-based schedules) and **Next run value** (meter-based schedules) in the Plan Service configuration. Maintenance schedule job checks for a maintenance schedule template in a plan record and creates maintenance cases.

For more information, see Create plan service configuration and Workplace planned maintenance scheduled job.

Procedure

1. Navigate to **All** > *`Workplace Central`*.
2. Select the **Preventive Maintenance** tab.

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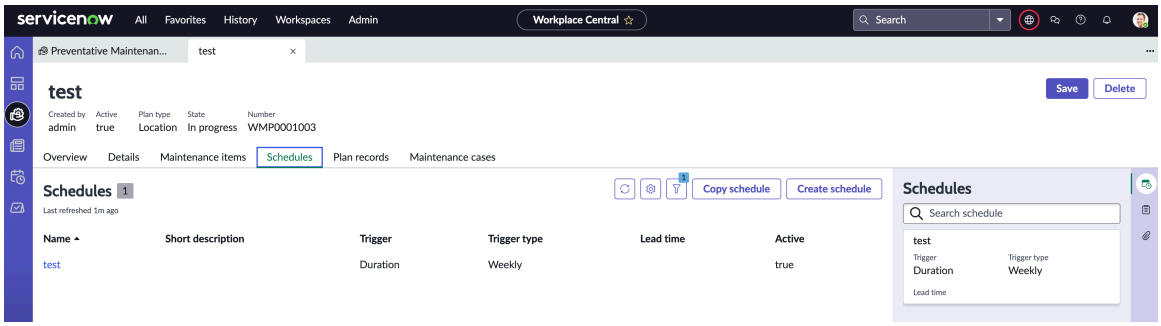
3. Select open a published maintenance plan from **My Plans** or **All plans**.
4. On the maintenance calendar view, select the **Schedules** tab.



5. Select **Copy schedule** to copy a maintenance schedule for an existing maintenance plan.
6. Search for a maintenance plan name from the list.
7. Select **Copy**.

   An existing schedule is copied over to a maintenance plan item.

   Note: You can also create a maintenance schedule if copying a schedule isn't the best option for a maintenance plan.

8. To create a schedule, select **Create schedule**.

   The New Schedule form opens. Fill in the form fields.

New Schedule form

Field	Description
Name	Name for the schedule. For example: Weekly schedule for meeting rooms.
Short description	Brief description about the schedule or schedule type.
Interval	The time or duration during which the schedule job should run. For example, select any of the following from the drop-down list: ○ Weekly ○ Monthly ○ Annually ○ Week in a month
Active	Select the check box to activate the schedule for a maintenance plan.
Trigger	Option to create a duration or meter-based scheduled maintenance. ○ **Duration**: Maintenance to be performed based on time (Next Run time). Depending on your selection, additional fields are displayed to define a duration. For example: Quarterly, weekly, hourly, and so on. ○ **Meter**: Maintenance to be performed based on count. Based on your selection, **Every** and **Field** options appear. For example: Change the printer cartridge after every 1000 printed sheets.
Trigger type (Duration)	Trigger type determines the schedule run time interval duration (weekly, monthly, annual, and so on).

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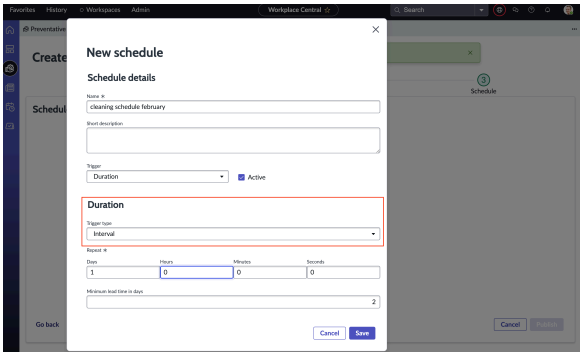
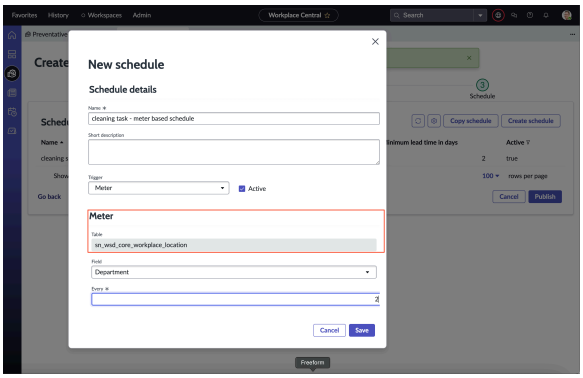
Field	Description
	 For a duration-based schedule, complete the following field information: **Interval**: For example, select a duration from the drop-down options. For example: **Weekly** Repeat: Repeat interval hours. For example: 1 hour.
Trigger type (Meter)	For meter-based schedule, complete the following field information:  ○ **Table**: Workplace Location or Model. Selected by default. The selection depends on your selection of Model (asset) or Location while creating a maintenance plan. For more information, see Create and publish maintenance plans. ○ **Field**: Field value for the trigger type. Select a value from the drop-down options. For example, **Start Date and time**. ○ **Every**: The repeat interval duration. The number of occurrences that must be recorded before the maintenance plan is executed. Takes an integer-based value and the value must be greater than zero (0). For example: 2 days.
Minimum lead time in days	Applicable only for a duration-based schedule and takes integer-based values (For example: 2). Number of days prior to the scheduled due date to determine the date on which the work should begin. That date is pre-filled in the Scheduled start field for the task. This field appears when Duration is selected for Trigger. The scheduled job ensures that the **Next run time** duration has the lead time value considered (Next run time value = Next schedule target date - Lead time).

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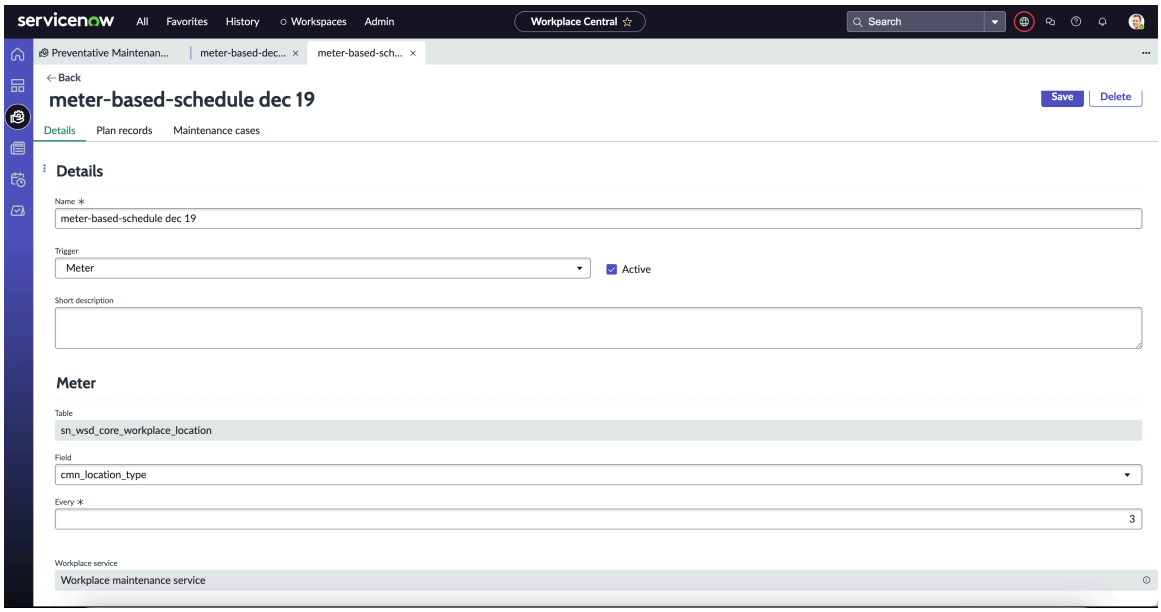
Field	Description
	For example, if your **Due day of week** is next week Monday and your lead time is 2, then your lead time is Friday (the current week). By Friday, the maintenance plan schedule is assigned to a Workplace Manager or administrator for executing or triggering the schedule next week Monday.

9. Select **Save**.
10. Publish the plan.
11. Select the published plan record and on the calendar view, navigate to the **Schedules** tab.
12. Select and open the schedule to view details.



Workplace planned maintenance scheduled job

The scheduled Job **Workplace Planned Maintenance Nightly Run** runs at the configured time and creates maintenance cases. It also pre-creates maintenance cases when the scheduled duration is less than a day.

The scheduled job can pre-create cases for day and up to two days ahead of the scheduled time. This is based on the time difference between the system time zone where the job is running, and the workplace agent time zone working on the cases.

The scheduled job **Workplace Planned Maintenance Nightly Run** performs the following:

- Creates duration-based cases.
- Creates meter-based cases.

The scheduled job can also pre-create maintenance cases when the schedule configured is less than a day. The duration is based on your system time zone settings. For example, if you have a maintenance schedule of six hours, it creates the following number of maintenance cases:

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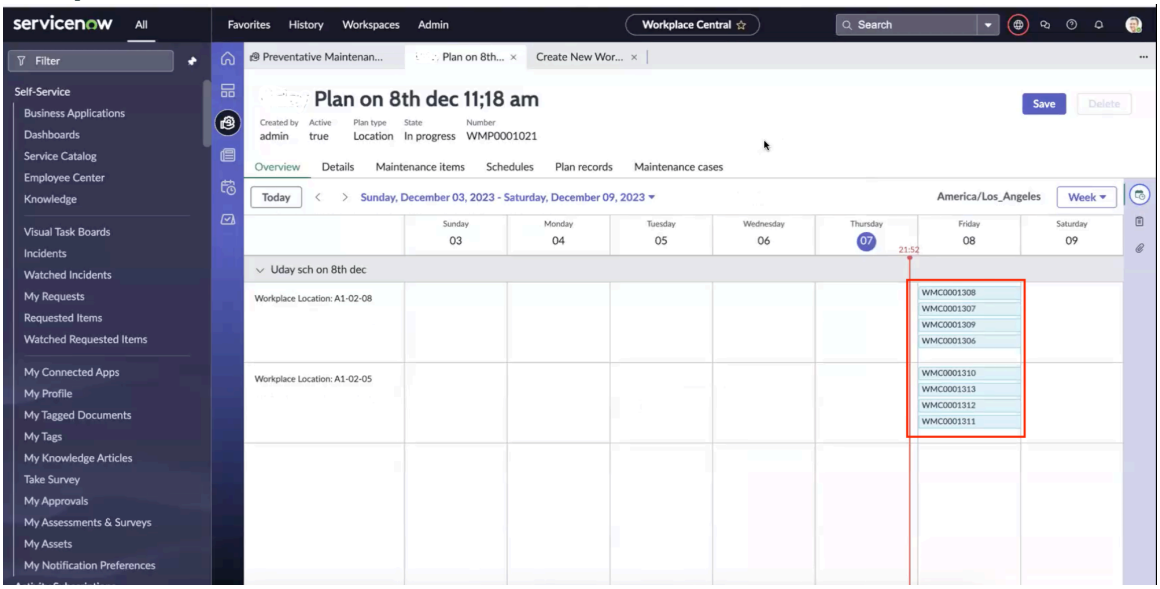
- For a six-hour schedule, four maintenance cases are created for each maintenance asset or location in a day.
- For a six-hour schedule, eight maintenance cases are created for two maintenance assets or locations in a day (four cases for each).

Workplace Maintenance cases



- For a six-hour schedule, 12 maintenance cases are created for three maintenance assets or locations (four cases for each).

When the scheduled job runs, it creates maintenance cases only for those planned records that have a template associated to a maintenance schedule.

Note: When a maintenance schedule is created, it picks up a template from the Workplace maintenance service configuration table (sn_wsd_maintenance_service_config). Based on your requirements, associate a template to a plan record. Multiple templates can be created and associated to a maintenance plan. For more information, see Create a workplace template configuration.

Duration-based cases

For duration-based cases, the **Workplace Planned Maintenance Nightly Run** scheduled job performs the following:

- Fetches all active plan records having the **Next run time** duration.
- Filters out plan records where the Next run time is 48 hours or less than a day.

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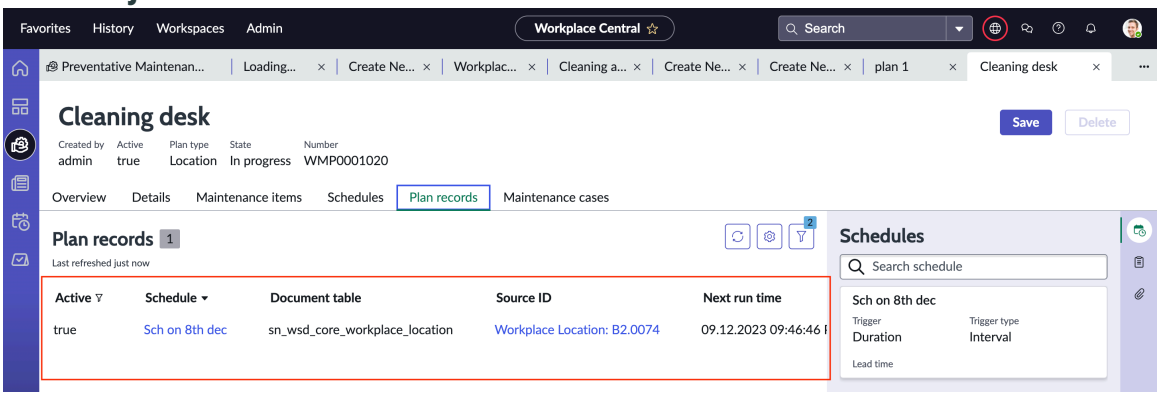
Schedule job Next run time



- Checks for an entry in the Workplace Maintenance Service Configuration (sn_wsd_maintenance_service_config) table.
- Gets all records from the Workplace Maintenance Service Configuration table.
- For each record in the Workplace Maintenance Service Configuration table, the schedule for the current plan record must have a template associated to it.
  - If there's a template, the scheduled job creates a maintenance case and updates the **Next run time** in the Workplace Maintenance Service Configuration table for a plan record.
  - If there's no template associated to a plan record, the scheduled job fetches the next plan record in a queue.

Note: When defining a duration-based maintenance schedule, you can define the **Minimum lead time in days** (takes integer-based values). For example, If if the lead time is 0, it indicates that the cases for the current day are created today itself. But if the lead time is 1, the cases were created yesterday, that is, the cases are generated one day ahead of the schedule. The **Next run time** duration has the lead time value defined for a schedule. For more information, see Create or copy a maintenance schedule.

Meter-based cases

For meter-based cases, the **Workplace Planned Maintenance Nightly Run** scheduled job performs the following:

- The scheduled job fetches all active plan records having a **Next run value**.
- For each plan record, the **Next run value** depends on the **Field** name value. The **Field** value is available when you're creating a meter-based schedule.

  For more information, see in Create or copy a maintenance schedule.
- The scheduled job retrieves the value of the **Field** name from the Asset (sn_ent_asset) table and compares it with the **Next run value** for a plan record.
- The schedule job checks if the **Next run Value** is less than the actual value in the Asset table and proceeds further.
- if the **Next run value** is more, it fetches the next plan record in a queue.
- The maintenance schedule for a current plan record must have an entry in the Workplace Maintenance Service Configuration (sn_wsd_maintenance_service_config) table.
- Gets all the records from the Workplace Maintenance Service Configuration table for that schedule in a Plan record.

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- For each record in the Workplace Maintenance Service Configuration table, the schedule for the current plan record must have a template associated to it.
  - If there's a template associated to a maintenance schedule, the schedule job creates a workplace maintenance case and updates the **Next run value** for a plan record.
  - If there's no template associated to a maintenance schedule, the scheduled job picks up the next plan record in a queue.

Create workplace services

Create Workplace services like catering, office supply, parking, or any other service. Associate this service to a default general request template.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Services.**.
2. On the workplace service form, fill in the fields:
   - Service Name: Name of the workplace service. For example, Workplace cleaning.
   - Case table: Name of the case or request table. Select the **Workplace Maintenance Case** (sn_wsd_maintenance_case) table.
   - Fulfillment Type: Select **Service Activity** from the drop-down options.
   - Default Template: Default template for Workplace Maintenance Management. Search for the **General maintenance request** template using the lookup list icon ().
3. Select **Update**.

Create plan service configuration

Configure a plan service to associate workplace services and set scheduling conditions for a plan record.

Before you begin

The maintenance schedule must have an entry in the Workplace Maintenance Service Configuration (sn_wsd_maintenance_service_config) table for a plan record. Set conditions for a scheduling job to create maintenance cases for active plan records.

Role required: admin

Procedure

1. Navigate to **All** > *Workplace Central* > **Preventive Maintenance** > **Plan Service Configurations**.
2. Select **New**.
3. On the Workplace Maintenance Configuration form, fill in the fields:
   a. Workplace service: Name of the Workplace service.

      Select the lookup list icon () and workplace service for a plan record. For example: Cleaning desk.

      For more information, see Create workplace services.

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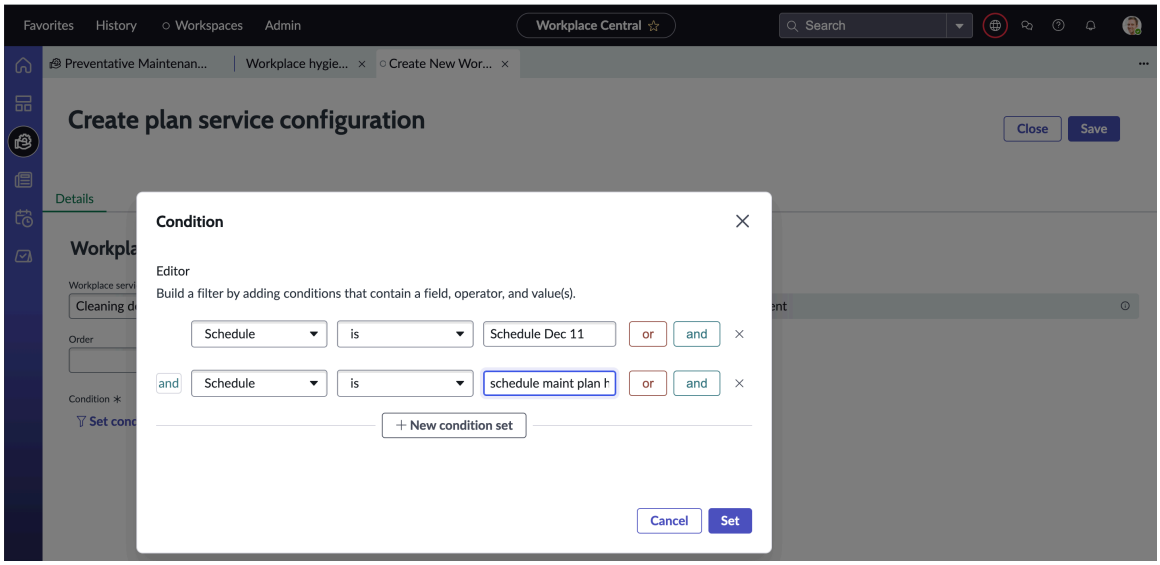
b. Order: Integer-based value.
The highest order value is prioritized. For example: 100.

c. Select the **Set conditions** filter and apply filter conditions for a selected item.
For example, select **ScheduleisWorkplace cleaning**. The selected condition is applied to all plan records in a selected plan.



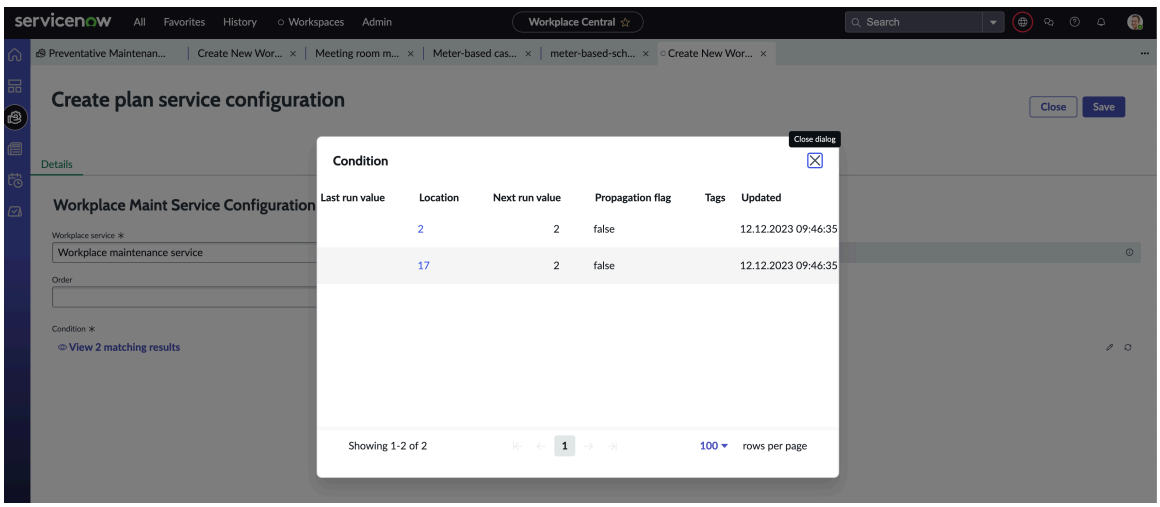
For more information about Workplace services, see Create workplace services.

.

d. Select **Set**.

e. Expand **View matching results** to see services associated with a plan service configuration.

a. Select and open the **View matching results** to see the schedule job **NameNext run time** or **Next run value** duration.



The selected schedule is updated in the Workplace Maintenance Service Configuration table and the schedule template is associated to it. If there's a template associated to a schedule, it creates a workplace maintenance case.

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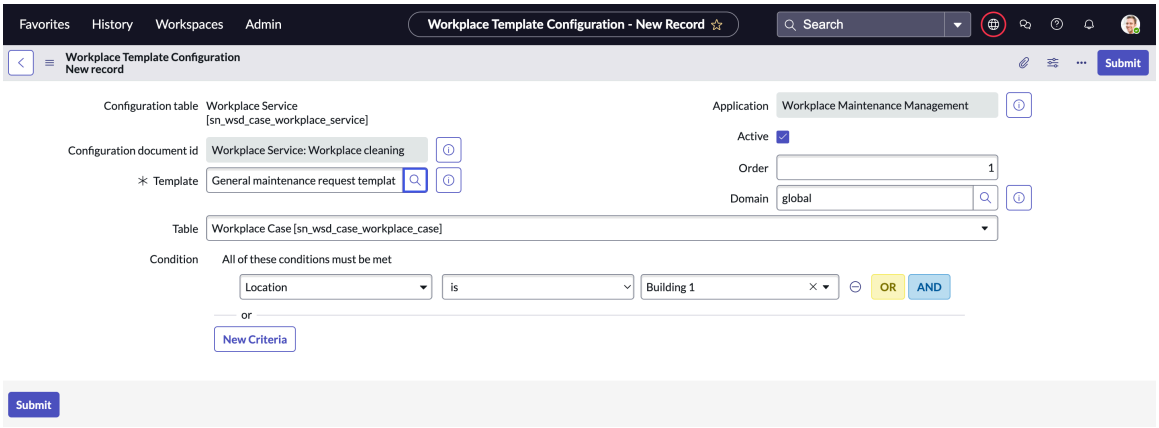
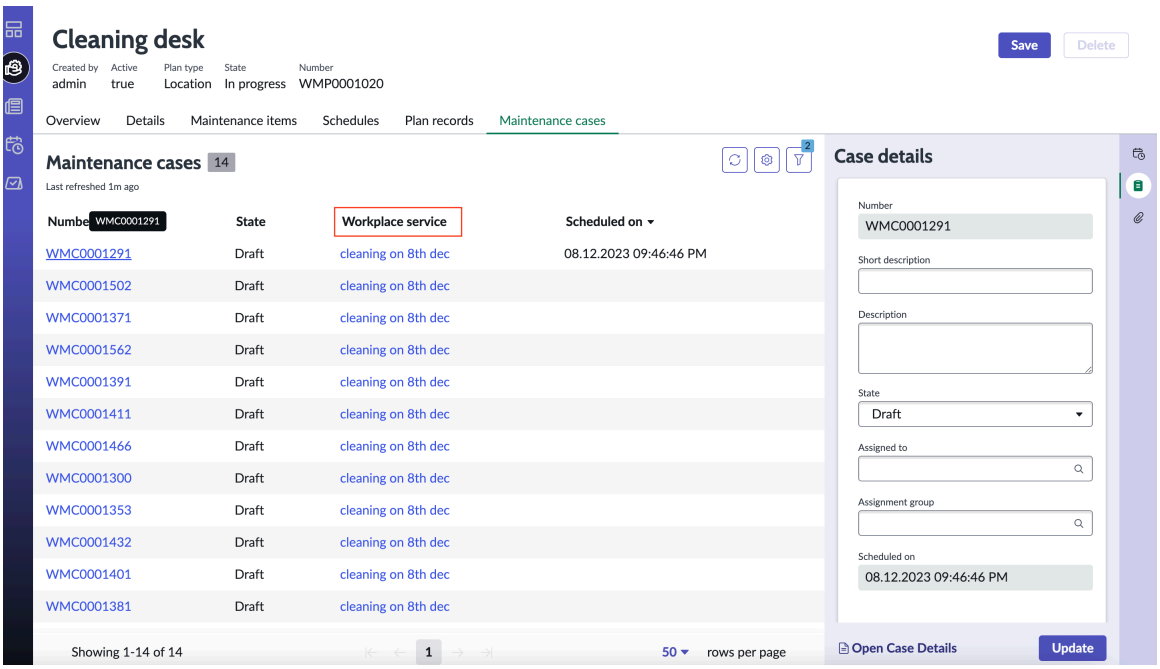


For more information, see Workplace planned maintenance scheduled job and Workplace maintenance cases.

4. Select **Save**.
5. The schedule job **Workplace Planned Maintenance Nightly Run** runs and creates maintenance cases for a workplace service in a plan record.
6. Navigate to a published plan record.
7. Select **Maintenance cases** in the calendar view.
8. The Workplace Services column shows the plan service configuration associated with a plan record.



This record is updated in the Workplace Maintenance Service Configuration table.

For more information, see Workplace maintenance cases.

Workplace maintenance cases

The schedule job creates maintenance cases for plan records.

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Before you begin

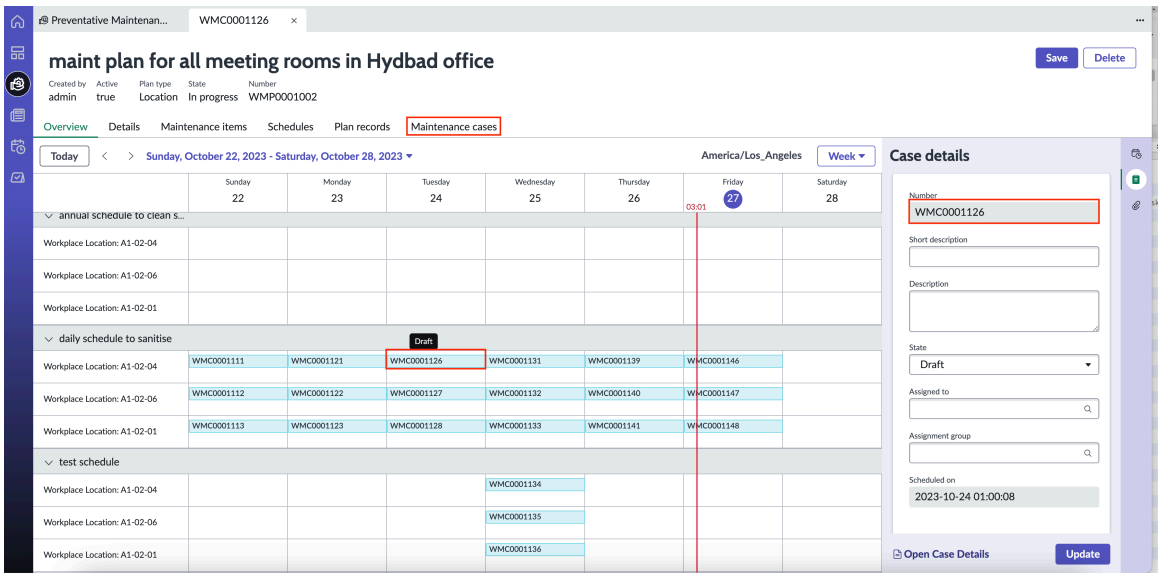
The scheduled job Workplace Planned Maintenance Nightly runs every 48 hours (end of day tomorrow) and creates duration-based and meter-based cases.

Role required: admin

Procedure

1. Select a published plan record.
2. On the calendar view, select the **Maintenance case** tab to view cases created by the scheduled job.

   The **Workplace Maintenance Nightly run** scheduled job generates maintenance cases for maintenance plan records.



3. Select a maintenance case to view the **Workplace Service** associated with a maintenance case and the scheduled job value for a case.

   For more information, see Create plan service configuration.

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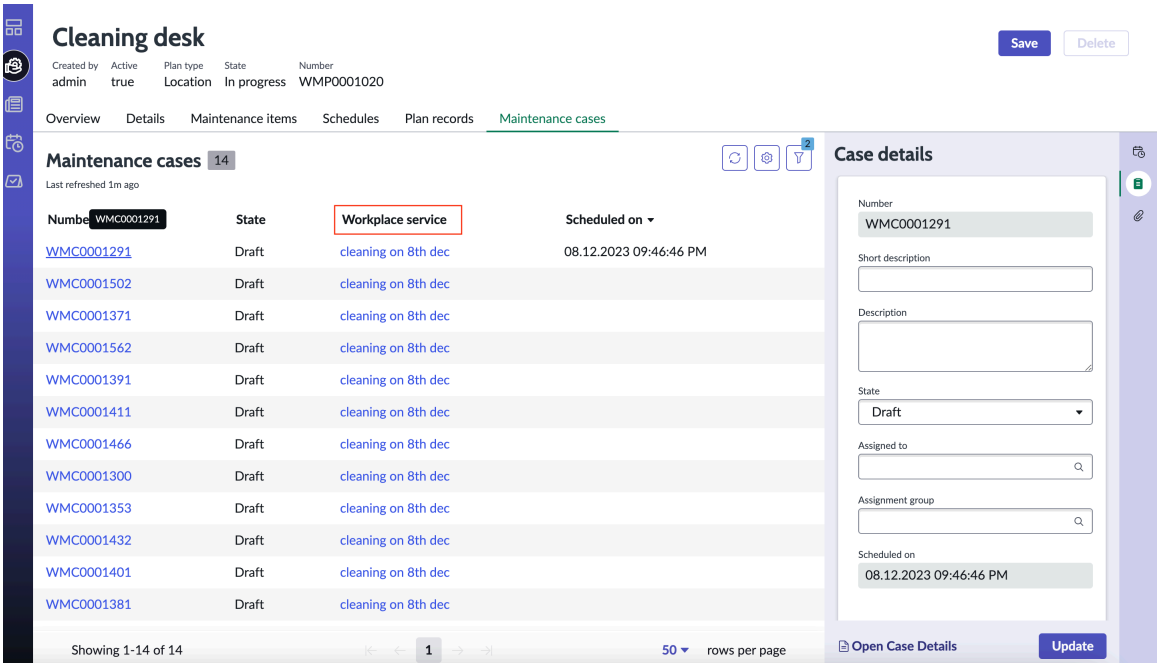

4. **Optional:** Select a maintenance case to open the Case details panel and perform the following to update the record:
   a. State: Update the maintenance case details by changing the maintenance plan state (Draft, Work in progress, Complete, and so on).
   b. Assigned to: Select a user to assign this case.
   c. Assigned to group: Select a user group to assign this case.
   d. Select **Update**.
5. **Optional:** Navigate to **All** > **System Definitions** > **Scheduled jobs**.
   a. Search for Workplace Maintenance Management in the Application Column.
   b. **Workplace Maintenance Nightly run**: This scheduled job runs every 48 hours (end of day tomorrow) and generates maintenance cases for maintenance plan records.
   c. To execute the schedule job before the scheduled time, select **Execute Now**.
   The scheduled job checks for active plan records with a **Next Run time** (duration-based schedule) or **Next run value** (meter-based schedule) and checks for a schedule template in a plan record. When it finds a schedule template, it creates maintenance cases.
   For more information about how to create a scheduled job and how the scheduled job picks up plan records based on conditions and workplace services, see Create or copy a maintenance schedule and Workplace planned maintenance scheduled job.

Workplace Maintenance Management dashboard and analytics

The Workplace Maintenance Management dashboard and reporting module provide high-level reporting on maintenance plans, plan records, and cases. Preventive maintenance dashboard provides insights for workplace managers and administrators on all plans, live active plans, plans in draft state, and maintenance cases.

To view the dashboard, you must be assigned one of the following roles:

- sn_wsd_maint.admin
- sn_wsd_maint.manager

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Access the dashboard by navigating to **All** > **Workplace Central** > **Preventive Maintenance** > **Maintenance Plans**. Within the Preventive Maintenance tab, the different parts of the dashboard can be selected.

Note: Two scheduled jobs **Workplace Maintenance Case Daily Data Collection** and **Workplace Maintenance Case Historical Data Collection** collect data to provide insights in Workplace Maintenance Management Dashboard.

A filtered list of workplace management plans can be viewed by clicking the following score components:

Dashboard data

Data	Description
All Plans	Total number of maintenance plan records. The **All plans** view provides a summary of all your maintenance plans. You can monitor plans, including the plan start and end dates and review the status of a maintenance plan (plans in work in progress or in a draft state).
My Plans	Personal assigned plans. Shows workplace management plans created by workplace users.
Active Plans	Live active plans that are initiated.
Draft Plans	Plans that are in a **Draft** state.
Maintenance cases this month	Graphically presented in a pie or line chart. Provides insights on the total number of Preventive and Corrective maintenance plans. Click an item on the chart to view maintenance case details for a maintenance plan record.

Point to the graph or pie chart to view details. Selecting the pie chart or the graph takes the user to a tab that lists the maintenance cases.

Selecting a plan from the list of plans take the user to a tab that lists the details for that plan record. Selecting the **New** button enables you to create a maintenance plan. For more information, see Create or copy a maintenance schedule.

Workplace Maintenance Management references

Several roles and views are available to help manage plan records with Workplace Maintenance Management.

Maintenance plan schedule examples

Maintenance plans are created for models (assets) or locations. The schedule trigger type defined for a maintenance plan can be meter or duration-based schedule. Associate multiple templates to maintenance schedules as required. The scheduled job fetches plan records that have a template associated to it and creates maintenance cases for a maintenance plan.

For example, use cases for creating maintenance plans can be based on the following:

- Schedule printer ink cartridge replacement
- Schedule coffee beans refill

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Maintenance schedule for printer ink cartridge replacement

Schedule a printer ink cartridge replacement after printing a specified number of pages for a location. For example, 10,000 pages. Define a general plan with a meter-based maintenance schedule. Associate a schedule template, for example, Schedule template A.

1. Create a model-based maintenance plan for HP Printer Cartridge Replacement and publish the plan.

   For more information, see Create and publish maintenance plans.

2. Create a meter-based schedule:
   - Name: Schedule name.
   - Trigger: Select **Meter**.
   - Trigger Type: Select the following trigger types for a meter-based schedule:
     - Table: Pre-filled values based on your plan type (model or location).
     - Field: For example, select the location type.
     - Every: Integer-based value. For example: 3

The maintenance plan schedules the HP printer to replace ink cartridges after printing 10, 000 pages.

Schedule coffee beans refilling for coffee machines

Schedule coffee beans refilling for coffee machines daily. Associate a schedule template, for example, Schedule template B. The schedule should have an entry in the Workplace Maintenance Service configuration table.

1. Create a model-based maintenance plan for Coffee machines and publish the plan.
2. Create a duration-based schedule:
   - Name: Schedule name.
   - Active: Select this option to activate the schedule for a maintenance plan.
   - Trigger: Select **Duration**.
   - Trigger Type: Interval. Specify the duration in days and hours since this is a daily schedule.

The coffee beans are refilled daily based on the scheduling condition and template associated to this maintenance plan.

For more information, see Workplace planned maintenance scheduled job.

Components installed with Workplace Maintenance Management

Different roles and components or tables are available with the installation of Workplace Maintenance Management.

Roles installed with Workplace Maintenance Management

Navigate to **All** > **System Definition** > **Roles** > **.**

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Roles installed with Workplace Maintenance Management

Role title [name]	Description	Contains roles
sn_wsd_wc.manager	Provides read access to all data including Occupancy Dashboard and other dashboards.	sn_wsd_wc.user
sn_wsd_wc.admin	Provides admin access to configure and set up the Workplace Connectors application	sn_wsd_wc.manager
sn_wsd_wc.user	Provides read access to only a few columns and fields. The read access is set up by administrators.	None

Tables installed with Workplace Maintenance Management

Navigate to **All** > **System Definition** > **Tables.**

Tables installed with Workplace Maintenance Management

Table	Description
Workplace Maintenance Plan [sn_wsd_maintenance_plan]	Stores preventive maintenance plans.
Workplace Maintenance Plan Items [sn_wsd_maintenance_m2m_plan_maint_item]	Stores all the items (locations or assets) that are part of a maintenance plan.
Workplace Maintenance Schedule [sn_wsd_maintenance_schedule]	Stores all the schedules (daily, weekly, monthly and so on) created for a Maintenance plan.
Create a maintenance case [sn_wsd_maintenance_case]	Stores information about maintenance cases.
Maintenance Plan Record [sm_m2m_maint_plan_to_record]	Stores the plan records (a record for every schedule and maintenance item combined).
Workplace Maintenance Service Configuration (sn_wsd_maintenance_service_config)	Associates workplace services and sets scheduling conditions for a plan record. The schedule job fetches plan records that have a maintenance schedule template for a workplace service to create maintenance cases. For more information, see Create plan service configuration and Workplace planned maintenance scheduled job.

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Workplace Maintenance Management Scheduled Jobs

Navigate to **All** > **System Definition** > **Scheduled Jobs.**

Scheduled jobs installed with Workplace Maintenance Management

Scheduled Job	Description
Workplace Planned Maintenance Nightly Run	A scheduled job runs every 48 hours (2 days) to fetch plan records and create maintenance cases. For more information, see Workplace planned maintenance scheduled job.
Workplace Maintenance Case Daily Data Collection	This scheduled job collects data and populates it in the Workplace Maintenance Management Dashboard. Collects data as specified in the Relative start and Relative end fields. The collection time is time zone specific.
Workplace Maintenance Case Historical Data Collection	This scheduled job collects historical data and populates it in the Workplace Maintenance Management Dashboard. Collects data as specified in the Relative start and Relative end fields. The collection time is time zone specific.

Workplace Lease Administration

The ServiceNow® Workplace Lease Administration enables you to create, manage and track workplace contracts from a single interface. You can also add workplace contract services, assets, locations, documents and track important dates. ServiceNow®

Get started

Explore Learn about Workplace Lease Administration concepts and features	**Configure** Configure Workplace Lease Administration	**Use** Use Workplace Lease Administration to add workplace contracts and track them
Manage Manage workplace contracts and renewals	**Reference** Get details about components like fields, tables, and properties	

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Exploring Workplace Lease Administration

The ServiceNow® Workplace Lease Administration enables you to create, manage and track workplace contracts from a single interface. You can also add workplace contract services, assets, locations, documents and track important dates.

Key features

Workplace Lease Administration provides the following features:

- Single interface to create and manage workplace contracts.
- Include terms and conditions in a contract.
- Attach documents to a contract record.
- Associate assets with a contract.
- Receive notifications regarding the expiry of the contracts.

Benefits

The benefits of this application include:

- Manage and track workplace contracts from a single interface.
- Manage contract services and related costs that are part of the workplace contract.
- Maintain various versions of documents efficiently by adding it to the workplace contract.
- Use the notifications received to manage the renewal and payments of the workplace contracts in a timely way.
- View the approval and contract history.

Workplace contract details

Using Workplace Lease Administration you can create workplace contracts with the following details:

- Workplace contract- Basic details for a workplace contract.
- Financial- Financial details, for example, a payment schedule, payment amount, and various costs.
- Renewal - Automatic renewal of a contract.
- Terms and Condition- Legal terms and conditions for a workplace contract.
- Associated contract items:
  - Workplace Service Contracts- Common contract services and their costs covered as part of the workplace contract.
  - Contract locations- Locations covered as part of the workplace contract.
  - Assets covered- Assets covered as part of the workplace contract.
  - Documents- Contract-related documents.

Workplace contract notifications

You will receive notifications on a weekly basic with the list of contracts that are near to their expiration date. For information about how to renew contracts, see Renew workplace contract in Core UI.

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Configure Workplace Lease Administration

As an admin, you can configure Workplace Lease Administration and enable workplace lease administration users to create and manage workplace contracts.

Activate Workplace Lease Administration

You can activate the Workplace Lease Administration plugin (sn_wsd_la) for Workplace Lease Administration if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

Workplace Lease Administration requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

The following items are installed with Workplace Lease Administration:

- Plugins
- Roles
- Tables

For more information, see Components installed with Workplace Lease Administration and Scripts installed with Workplace Lease Administration.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Workplace Lease Administration plugin (sn_wsd_la) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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Using Workplace Lease Administration

As a lease manager or administrator manager, you can create, manage, and track workplace contracts. You can add workplace contract services, relevant documents, and track important milestones.

As a lease administrator or manager, you can do the following:

- Create workplace lease contracts.
- Track the lease contracts as a tenant.
- Add workplace contract services along with its costs.
- Add contract locations.
- Add assets to a contract.
- Add documents.
- Build and add Terms and Conditions.
- Receive notifications regarding the lease contracts expiry.
- Renew workplace lease contracts before or after the expiry.

As a lease administration user, you can only view the workplace contracts.

You can access Workplace Lease Administration, either from the Core UI or Workplace Central. For more information on how to access and use the application from different views, refer to the following topics.

- Working with Workplace Lease Administration from the Core UI
- Working with Workplace Lease Administration from the Workplace Central

For more information about installing Workplace Central, see Install Workplace Central.

For more information on the workplace contract workflow, states, and substates, see Contract life cycle.

Working with Workplace Lease Administration from the Core UI

Create and manage workplace contracts from **Core UI**.

Access Workplace Lease Administration from Core UI

To access Workplace Lease Administration, navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.

For information about installing Workplace Lease Administration, see Activate Workplace Lease Administration.

Create workplace contracts in Core UI

As a lease administrator or manager, you can create workplace contracts and also add assets, terms and conditions, contract locations, and documents to a contract.

Before you begin

Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select **New**.

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3. In the **Contract Model** field, select **Lease**.
4. In the **Terms and conditions** section, specify the legal information in the contract.
   For more information, see Add and build contract terms and conditions in Core UI
5. On the form, fill in the rest of the fields.
   For description of the field values, see Workplace contract new record form.
6. Right-click the form header and select **Save**.
7. **Optional:** Add contract services, contract locations, assets, or documents to the contract.
   For more information, see the following topics:
   - Add a workplace contract service to a contract in Core UI
   - Add a workplace contract location in Core UI
   - Add assets to a workplace contract in Core UI
   - Add a document to a workplace contract in Core UI
8. Save and exit the contract or submit it for review.
   - To save and exit the contract, select **Update**.
   - To send a notification to the approver, select **Submit for Review**.

     For information about the approval process, see Approve or reject a workplace contract in Core UI.

Add a workplace contract service to a contract in Core UI

Workplace contract services are the common services offered as part of the lease contract. You can add and track the services along with their associated costs.

Before you begin

Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select the contract.
3. In the **Workplace Contract Services** related list, select **New**
4. On the form, fill in the fields.

Workplace Contract Service form

Field	Description
Name	Name of the contract service.
Cost	The currency and cost of the contract service.
Workplace Contract	The contract name is auto-filled.
Description	Description of the contract service.
Domain	The domain for the service.

5. If the contract service type you want does not appear in the **Workplace Contract Service type** field drop-down list, create it.

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a. Right-click **Category** and select **Configure choices**.

b. On the Configure Category Choices form, in the **Enter a new item field**, enter the name of the category that you want to add.

c. Select **Add**.

6. Select the desired category from the **Workplace Contract Service type** field drop-down list.
7. Select **Submit**.

Add a workplace contract location in Core UI

Add a location that is covered by the contract to a workplace contract.

Before you begin

Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. If the locations are not in the Contract locations related list, create them.
   a. Select **New**.
   b. Provide the location information in the Location form.
   c. Select **Submit**.
4. In the Contract locations related list, select the locations covered by the contract.
5. Select **Save**.

Result

The locations are added to the contract.

Add assets to a workplace contract in Core UI

Add assets to a workplace contract, including software licenses, to specify what the contract legally covers.

Before you begin

You must have an existing contract.

Linking a contract with assets clarifies what the contract legally covers. The Assets Covered related list is available only after you save or submit a workplace contract.

Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. Review the assets in the Assets Covered related list.
4. If a desired asset covered by the contract is not available for selection, create it.
   a. Select **New**.
   b. Select the type of asset to create.

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c. Fill in the form related to the asset type.

d. Select **Submit**.

5. In the Assets Covered related list, select **Edit**.
6. Select the assets covered by the contract.
7. Select **Save**.

Result
The selected assets are added to the contract.

Add workplace contract clauses in Core UI

Add workplace contract clauses, including insurance clause, parking clause, warranty clauses to store the lease contract clauses.

Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure
1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. In the **Workplace Contract Clauses** related list, select **New**.
4. On the Workplace Contract Clause form, fill in the fields.

Workplace Contract Clauses form

Field	Description
Clause type	Type of clause.
Workplace contract	Workplace contract reference.
Silent	Yes or No
Clause summary	Description of the clause.

5. Select **Submit**.

Result
The contract clauses are added to the contract.

Add workplace contract options in Core UI

Add workplace contract options such as option to renew, option to sub lease, option to terminate to store the lease contract options.

Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure
1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. In the **Workplace Contract Options** related list, select **New**.
4. On the Workplace Contract Option form, fill in the fields.

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Workplace Contract Option form

Field	Description
Option number	Number indicating the contract option.
Option type	Type of option.
Workplace contract	Workplace contract reference.
Effective date	Date when the option becomes effective.
Must exercise by	Date by when the option can be exercised by the tenant.
Renewal expiration	Renewal term expiration date.
Notice period	Notice period to exercise an option
Comment	Description of the contract option.

5. Select **Submit**.

Result
The contract options are added to the contract.

Add workplace contract responsibilities in Core UI

Add workplace responsibilities to indicate who (landlord or tenant) is responsible for different activities such as lawn maintenance, painting, repairing.

Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. In the **Workplace Contract Responsibilities** related list, select **New**.
4. On the Workplace Contract Responsibility form, fill in the fields.

Workplace Contract Responsibility form

Field	Description
Responsibility type	Describes the nature of work. For example, Repair.
Financial responsibility	Describes which party has to pay for the work.
Execution responsibility	Describes which party has to take up the work.
Granted in lease	Option to specify whether the activity addressed in the lease contract.
Workplace contract	Workplace contract reference.
Service	Activity for which the responsibilities are being defined.
Description	Description of the responsibility.
Document section	Reference in the contract document where the responsibility is described.

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Field	Description
Document name	Reference in the contract document where the responsibility is described.
Document page	Reference in the contract document where the responsibility is described.

5. Select **Submit**.

Result
The contract responsibilities are added to the contract.

Add and build contract terms and conditions in Core UI

Add and build terms and condition when a contract is in the Awaiting Review, Rejected, or Renewal Rejected substate.

Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure
1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. In the **Terms and Conditions** section, double-click **Insert a new row**.
4. Select the Lookup using list icon and see whether the terms and conditions record you want to add to the record exists.
5. If the record doesn't exist, create it.
   a. Select **New**.
   b. In the Terms and conditions form, provide a name and description for the terms and conditions record.
   c. Select **Submit**.
6. Select the terms and condition record.
7. **Optional:** Enter a number in the **Order** field to specify the sequence in which the record should appear in the terms and condition document.

   Note: If you attempt to enter a duplicate terms and conditions record for a contract and save the record, an error message appears and the new duplicate record is not added.

8. In **Related Links**, select **Build Terms and Conditions**.
   All records from the Terms and Conditions related list are added to the **Terms and Conditions** section of the contract record. The terms and conditions records are built in the sequence specified in the **Order** field.

Add a document to a workplace contract in Core UI

Add documents to the workplace contract to maintain a record of all relevant documents and different versions of those documents.

Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

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Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select the contract.
3. View the documents listed in the Documents related list.
4. If the document record is not included in the Documents related list, create it.
   a. Select **New**.
   b. Fill in the form related to the document record.
   c. Select **Submit**.
5. Link a document record to the contract.
   a. Select **Edit**.
   b. Select the document record from the list by selecting its check box.
   c. In **Actions on selected rows** drop-down menu, select **Link Documents**.
6. **Optional:** Add a new version of a document to a record
   a. In the **Documents** related list, right-click the doc record.
   b. Select **Upload Version**.
   c. Select the file type that you want to upload.
   d. Select OK.

Submit workplace contract for review in Core UI

You can send a contract that is in Draft state for approval.

Before you begin

Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract in Draft state.
3. In the **Approver** field, select an approver for the contract.
4. Select **Submit For Review**.

Result

An email message is sent to the selected approver and the contract substate changes to Under Review.

Approve or reject a workplace contract in Core UI

As a lease administrator or manager, you can approve or reject a workplace contract after it is submitted for review.

Before you begin

Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract in the Requested state.

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3. Either approve or reject the contract.
   - To approve the contract, select **Approve**.

     The contract substate changes to Approved.
   - To reject the contract, select **Reject** and enter a rejection reason in the **Comments** field.

     The contract substate changes to Rejected.
4. Select **Update**.

Result

- Contracts with the state set to Draft and a start date set in the future are kept in the Draft state until the start date is reached.
- If the contract has a substate of Approved, the system changes the state to Active and removes the Substate value.
- When a contract with a state of Draft and a start date set to a date in the past is approved, the State value is automatically set to Active and the Substate value is left empty.

Working with Workplace Lease Administration from the Workplace Central

Create and manage workplace contracts from the Workplace Central.

Access Workplace Lease Administration from the Workplace Central Workspace

- Activate Workplace Central plugin (sn_wsd_central).
- Ensure you have the role sn_wsd_la.workplace_central_user assigned.
- Access Workplace Lease Administration using one of the following methods:
  - Navigate to **All** > **Workplace Central** > **Workplace Central** > **Lease Administration**
  - Navigate to **Workspaces** > **Workplace Central** > **Lease Administration**

For information about installing Workplace Lease Administration, see Activate Workplace Lease Administration.

Create workplace contracts in Workplace Central

As a lease administrator or manager, you can create workplace contracts and also add assets, terms and conditions, contract locations, and documents to a contract.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Click **New**.
4. In the **Contract Model** field, select **Lease**.
5. In the **Terms and conditions** section, specify the legal information in the contract.
   For more information, see Add and build terms and conditions in Workplace Central

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6. On the form, fill in the rest of the fields.
   For description of the field values, see Workplace contract new record form.
7. Click **Save**.
8. **Optional:** You can submit the contract for review or add contract services, contract locations, assets, terms and condition, or documents to the contract.
   For more information, see the following topics:
   - Add a workplace contract service in Workplace Central
   - Add workplace contract locations in Workplace Central
   - Add assets to a workplace contract in Core UI
   - Add documents to a workplace contract in Workplace Central
9. Either save the contract or submit it for review.
   - Click **Save** to save the contract.
   - Click **Submit for Review** to send notification to the approver.

     For information about the approval process, see Approve or reject workplace contract in Workplace Central.

Add a workplace contract service in Workplace Central

Workplace contract services are the common services offered as part of the lease contract. You can add and track the services along with their associated costs.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select the contract.
4. In the **Workplace Contract Services** related list, click **New**.
5. On the form, fill in the fields.

Workplace Contract Service form

Field	Description
Name	Name of the contract service.
Cost	The currency and the cost of the contract service.
Workplace Contract	Name of the contract. The contract name is auto-filled.
Workplace Contract Service type	The Workplace Contract Service type. The available options are Parking, Janitorial, or Common Area Maintenance.
Description	Description of the contract service.
Domain	The domain for the service.

6. Select **Save**.

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Add workplace contract locations in Workplace Central

Add locations to the workplace contract for the locations the contract covers.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. In the **Contract locations** related list, either select an existing location or add a new location.

Location source	Action
Existing location	**a.** Select **Add**. **b.** Select the locations that are covered by the contract. **c.** Select **Save**.
New location	**a.** Select **New**. **b.** Fill in the location new record form. **c.** Select **Save**.

Result

The locations covered are added to the contract.

Add asset to workplace contract in Workplace Central

Add assets to the workplace contracts.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

About this task

Linking a contract with assets clarifies what the contract legally covers. The Assets Covered related list is shown only after you save or submit a workplace contract.

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. Review the assets in the Assets Covered related list.
5. If a desired asset covered by the contract is not available for selection, create it.
   a. In the **Assets Covered** related list, select **New**.
   b. Fill in the form related to the asset type.
   c. Select **Save**.
6. In the **Assets Covered** related list, select **Add** to add assets.

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7. Select the assets that is covered by the contract.
8. Select **Add**.

Add workplace contract clause in Workplace Central

Add workplace contract clauses, including insurance clause, parking clause, warranty clauses to store the lease contract clauses.

Before you begin
Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure
1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. In the **Workplace Contract Clauses** related list, select **New**.
5. On the Workplace Contract Clause form, fill in the fields.

Workplace Contract Clauses form

Field	Description
Clause type	Type of clause.
Workplace contract	Workplace contract reference.
Silent	Yes or No
Clause summary	Description of the clause.

6. Select **Submit**.

Result
The workplace contract clauses are added.

Add workplace contract options in Workplace Central

Add workplace contract options such as option to renew, option to sub lease, option to terminate to store the lease contract options.

Before you begin
Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure
1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. In the **Workplace Contract Options** related list, select **New**.
5. For field details on the Workplace Contract Option form, see Add workplace contract options in Core UI.
6. Select **Submit**.

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Result
The contract options are added to the contract.

Add workspace contract responsibilities in Workplace Central

Add workplace responsibilities to indicate who (landlord or tenant) is responsible for different activities such as lawn maintenance, painting, repairing.

Before you begin
Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. In the **Workplace Contract Responsibilities** related list, select **New**.
5. For field details in the Workplace Contract Responsibility form, see Add workplace contract responsibilities in Core UI.
6. Select **Submit**.

Result
The workplace contract responsibilities are added.

Add and build terms and conditions in Workplace Central

After you create a terms and conditions record, add the record to a lease contract that is in the Awaiting Review, Rejected, or Renewal Rejected substate.

Before you begin
Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. In the **Terms and Conditions** section, double-click **Insert a new row**.
5. Click the reference lookup using list icon .
6. Select the Lookup using list icon and see whether the terms and conditions record you want to add to the record exists.
7. If the record doesn't exist, create it.
   a. Select **New**.
   b. In the Terms and conditions form, provide a name and description for the terms and conditions record.
   c. Select **Submit**.
8. Select the terms and condition record.
9. **Optional:** Enter a number in **Order** to specify the sequence in which the record should appear in the terms and condition document.

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Note: If you attempt to enter a duplicate terms and conditions record for a contract and save the record, an error message appears and the new duplicate record is not added.

10. In **Related Links**, select **Build Terms and Conditions**.
    All records from the Terms and Conditions related list are added to the **Terms and Conditions** section of the contract record. The terms and conditions records are built in the sequence specified in the **Order** field.

Add documents to a workplace contract in Workplace Central

Add documents to the workplace contract to maintain all the relevant documents in a single place and maintain different versions of the document.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract.
4. Link an existing document record.
   a. In the **Documents** related list, select **Link documents**.
   b. Select the document you want to add and select **Ok**.
5. If the document record that you are looking for is not available, create a new document record.
   a. In the **Documents** related list, select **New**.
   b. On the Create New Documents form, fill in the fields.
      For a description of the field values, see Create New Documents form
   c. Select **Submit**.
6. Upload document versions to a document record.
   a. In the **Documents** related list, select a document record.
   b. In the attachment pane, select **Browse**.
   c. Select a document to be uploaded.
   d. Select **Upload**.
   e. Select **Submit.**

Submit a workplace contract for review in Workplace Central

You can send a contract that is in Draft state for approval.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

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Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract in **Draft** state.
4. Select an **Approver** for the contract.
5. Click **Submit For Review**.

Result

An email message is sent to the selected approver and the contract substate changes to Under Review.

Approve or reject workplace contract in Workplace Central

Approve or reject a workplace contract after it is submitted for review.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract in **Requested** state.
4. Either approve or reject the contract.
   - To approve the contract, select **Approve**.

     The contract substate changes to Approved.
   - To reject the contract, select **Reject** and enter a rejection reason in the **Comments** field.

     The contract substate changes to Rejected.

Result

- Contracts with the state set to Draft and a start date set in the future are kept in the Draft state until the start date is reached.
- If the contract has a substate of Approved, the system changes the state to Active and removes the Substate value.
- When a contract with a state of Draft and a start date set to a date in the past is approved, the State value is automatically set to Active and the Substate value is left empty.

Manage workplace contracts

Lease administrators and managers can track, renew, and view information related to workplace contracts.

You can access Workplace Lease Administration, either from the Core UI or Workplace Central from different views, refer to the below topics.

- Manage workplace contracts from Core UI
- Manage workplace contracts from Workplace Central

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For more information on the lease contract workflow, states, and substates, see Contract life cycle.

Manage workplace contracts from Core UI

Lease administrators and managers can track, renew, and view information related to workplace contracts from Core UI.

Renew workplace contract in Core UI

Renew a workplace contract after you have created it, when it is approaching expiration, or when it has expired.

Before you begin

Role required: sn_wsd_la.manager or sn_wsd_la.admin

About this task

You will receive an email notification when contracts are close to their expiration date.

You can renew a contract that meets the following conditions:

- The state is Active or Expired
- The substate is None or Rejected

Procedure

1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract in the Active or Expired state.
3. Select **Renew**.
4. On the form, fill in the fields.

Contract renewal form

Field	Descriptions
Approver	User to approve or reject the contract.
Options	Length of time for the renewal in years.
Renewal Start Date	Date on which the renewed contract takes effect.
Renewal End Date	Date on which the renewed contract expires.
Cost Adjustment Type	Type of cost adjustment applied to the renewed contract. The available values are None, Fixed, Manual, or CPI.
Cost adjustment amount	Numerical increase or decrease in price of the renewed contract. A negative number indicates a decrease in price. You can specify a value for **Cost Adjustment** or **Cost Adjustment Percentage** but not both.
Cost Adjustment Percentage	Percentage increase or decrease in the price of the renewed contract. A negative percentage indicates a decrease in price.

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Field	Descriptions
	You can specify a value for **Cost Adjustment** or **Cost Adjustment Percentage** but not both.

5. Save your changes.
   - To save all entered data, select **Submit for Review**.

     The contract is sent to the specified approver and the substate is changed to Under Review.
   - To save all entered data, select **Save**.

     You can submit the contract for renewal later. The substate is changed to Awaiting Review.
6. **Optional:** Change any information on the Contract form.
7. Select **Update**.

What to do next
If you selected the **Save** option, ensure that you select **Renew** when you're ready to submit the contract renewal for approval.

Adjust workplace contract in Core UI
Change the start date, end date, or payment amount after the contract is in the Active state.

Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

About this task
To adjust a contract, its state must be Active.

Procedure
1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select **Adjust**.
3. On the form, fill in the fields.

Contract values form

Field	Description
Start Date	Date on which the contract takes effect.
End Date	Date on which the contract expires.
Payment Amount	Total amount paid for the contract. If the contract has one or more rate cards, this field shows the total of all rate card base costs.

4. Select **Submit Adjustments**.

Cancel workplace contract in Core UI
Cancel an active contract if it is no longer relevant.

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Before you begin
Role required: sn_wsd_la.manager or sn_wsd_la.admin

Procedure
1. Navigate to **All** > **Workplace Lease Administration** > **Workplace Contracts**.
2. Select a contract.
3. Select **Cancel Contract**.
4. Click **Yes** to confirm contract cancellation.

Result
The contract state changes to Canceled.

Manage workplace contracts from Workplace Central

Lease administrators and managers can track, renew, and view information related to workplace contracts from Workplace Central.

Renew workplace contract in Workplace Central

Renew a workplace contract after you have created it, when it is approaching expiration, or when it has expired.

Before you begin
Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

About this task
You will receive an email notification when contracts are close to their expiration date.

You can renew a contract that meets the following conditions:

- The state is Active or Expired
- The substate is None or Rejected

Procedure
1. Navigate to **Workspaces** > **Workplace Central**.
2. Select **Lease Administration**.
3. Select a contract in **Active** or **Expired** state.
4. Click **Renew**.
5. On the form, fill in the fields.

Contract renewal form

Field	Descriptions
Approver	User to approve or reject the contract.
Options	Length of time for the renewal in years.
Renewal Start Date	Date on which the renewed contract takes effect.
Renewal End Date	Date on which the renewed contract expires.
Cost Adjustment Type	Type of cost adjustment applied to the renewed contract. The available values are None, Fixed, Manual, or CPI.

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Field	Descriptions
Cost adjustment amount	Numerical increase or decrease in price of the renewed contract. A negative number indicates a decrease in price. You can specify a value for **Cost Adjustment** or **Cost Adjustment Percentage** but not both.
Cost Adjustment Percentage	Percentage increase or decrease in the price of the renewed contract. A negative percentage indicates a decrease in price. You can specify a value for **Cost Adjustment** or **Cost Adjustment Percentage** but not both.

6. Save your changes.
   - To save all entered data, select **Submit for Review**.

     The contract is sent to the specified approver and the substate is changed to Under Review.

   - To save the entered data, select **Save**.

     You can submit the contract for renewal later. The substate is changed to Awaiting Review.
7. **Optional:** Change any information on the Contract form.
8. Click **Save**.

What to do next
If you selected the **Save** option, ensure that you click **Renew** when you're ready to submit the contract renewal for approval.

Adjust workplace contract in Workplace Central
Change the start date, end date, or amount to be paid for an contract in active state.

Before you begin
Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

About this task
To adjust a contract, the **State** should be **Active**.

Procedure
1. Navigate to **Workspaces** > **Workplace Central**.
2. Click **Adjust**.
3. Complete the form.

Adjust the contract values form

Field	Description
Start Date	Date on which the contract takes effect.
End Date	Date on which the contract expires.

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Field	Description
Payment Amount	Total amount paid for the contract. If the contract has one or more rate cards, this field shows the total of all rate card base costs.

4. Click **Submit Adjustments**.

Cancel workplace contract in Workplace Central

Cancel an active contract if it is no longer relevant.

Before you begin

Role required: sn_wsd_la.workplace_central_user, sn_wsd_la.manager or sn_wsd_la.admin

Procedure

1. Navigate to **Workspaces** > **Workplace Central**.
2. Select a contract.
3. Click **Cancel Contract**.
4. Click **Yes** to confirm contract cancellation.

Result

The contract state changes to Canceled.

Workplace Lease Administration references

Learn more about the forms used to create new records.

Workplace contract new record form

As lease administrator and manager you can use the workplace contract new record form to create new lease contracts.

Workplace contract form

Field	Description
Number	System generated sequential number.
Contract model	Model the contract is assigned to, which should be Lease.
Vendor	Landlord responsible for the contract.
Contract Number	Unique number identifying the contract record.
Name	Name for the contract.
Start date	Date on which the contract takes effect.
End date	Date on which the contract expires.
Lease type	Type of lease. The available values are Gross Lease, Modified Gross Lease, Net Lease, Double Net Lease, and Triple Net Lease
Leed certification score	Leadership in Energy and Environmental Design (LEED) level. The available values are Certified, Silver, Gold, and Platinum.
Notice duration (months)	Notice period to be given to the lessor in case the contract is not extended.

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Workplace contract form (continued)

Field	Description
Lease terms (months)	The contract term in months.
Original lease commencement	Date of commencement on the original lease.
Original lease expiration date	Date of expiration on the original lease.
State	Current state of the contract. The field values are Draft, Active, Expired, or Canceled.
Substate	Current substate of the contract. The field values are Awaiting Review, Under Review, Approved, or Rejected.
Contract Administrator	Person responsible for managing the contract and interacting with the vendor.
Approver	User who approves or rejects the contract.
Business Owner	The user who requested a workplace contract.
Lease class	Income lease or Expense lease. • Select Income lease in the case of subleasing when the organisation receives income. • Select Expense lease in the case of a regular lease when organisation has an expense.
Accounting type	Accounts payable or Accounts receivable. • Select Accounts payable if it is a regular lease where the organisation pays rent. • Select Accounts receivable if the organisation earns rent from the lease contract.
Rent commencement date	The date when rent commences.
vacate date	The date when the premises has to be vacated on lease expiration.
Possession date	Date when the leased property can take up possession.
Tenant	Tenant of a contract.
Primary use	The purpose for which the leased premises would be used.
Description	Brief description of the contract.

Area tab

Field	Description
Rentable area	Total rentable area of the leased premises.
Unit of measurement	Units of the rentable area and useable area.

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Area tab (continued)

Field	Description
Useable area	Total usable area of the leased premises.

Financial tab

Field	Description
Payment schedule	Schedule that defines when to make payments, for example, Monthly or Annually.
Payment amount	Amount that has been paid on the contract to date.
Total cost	Final cost of the contract after adjustments have been applied.
Yearly cost	Yearly cost of the contract.
Vendor account	Vendor account associated with the contract.
PO number	Purchase order number assigned to the contract.
Cost center	Cost center that is financially responsible for the asset.
Security deposit	The returnable sum paid to the lessor to cover for possible loss or damage.
Has rate card	Option to indicate whether the contract has an associated rate card.

Renewal/Extension tab

Field	Description
Automatically renew/extend	Indicates whether the contract can be renewed or extended at the end of its term.
Options	Duration of the contract renewal or extension, for example, 1 year.
Renewal start date	Date on which the contract renewal or extension takes effect.
Renewal end date	Date on which the contract renewal or extension ends.
Cost adjustment type	Type of cost adjustment applied to the contract. The available values are Fixed, Manual, or CPI (consumer price index).
Cost adjustment amount	Numerical increase or decrease in price of contract. A negative number indicates a decrease in price.

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Renewal/Extension tab (continued)

Field	Description
	You can specify a value for either **Cost adjustment** or **Cost adjustment percentage** but not both.
Cost adjustment percentage	Percentage increase or decrease in price of contract. A negative percentage indicates a decrease in price. You can specify a value for either **Cost adjustment** or **Cost adjustment percentage** but not both.

For detailed information on how to create workplace contract, see Create workplace contracts in Core UI

Components installed with Workplace Lease Administration

Several types of components are installed with activation of the Workplace Lease Administration application, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

User roles installed with Workplace Lease Administration

Role title [name]	Description	Contains roles
sn_wsd_la.manager	Create and edit lease contract records. Updates the spaces that are part of a lease contract.	• sn_wsd_la.user • contract_manager
sn_wsd_la.admin	Performs the Lease tracking module setup	• sn_wsd_la.manager • sn_wsd_central.workspace_user
sn_wsd_la.user	Read all lease contract information. No create or edit access.	• sn_wsd_central.workspace_user • contract_manager
sn_wsd_la.workplace_central_user	Enables users to access the Workplace Lease Administration application in Workplace Central.	None

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Tables

Tables installed with Workplace Lease Administration

Table	Description
Workplace Contract [sn_wsd_la_workplace_contract]	Extends the Application Contract table and stores workplace contracts.
Workplace Contract Service [sn_wsd_la_workplace_contract_service]	Stores workplace contract services related to the contract.

Scripts installed with Workplace Lease Administration

Scripts installed with Workplace Lease Administration.

Scripts installed with Workplace Lease Administration

Name	Description
WSDLeaseTrackingNotificationUtils	Handles notifications for the lease administration implementation class.
WSDLeaseTrackingNotificationUtilsSNC	Handles notifications in lease administration.

Workplace Reservations for Microsoft Outlook Add-in

Reserve a workplace space in less than a minute without using the Reservation portal. The ServiceNow® Workplace Reservations for Microsoft Outlook Add-in enables you to make a reservation using Microsoft Outlook directly.

Get started

Explore Learn about Workplace Reservations for Microsoft Outlook Add-in concepts and features.	**Configure** Configure the application and setup the manifest files.
Reserve Make a reservation using the Workplace Reservations for Microsoft Outlook Add-in.	**Reference** Get details about components like fields, tables, and properties.

Explore Workplace Reservations for Microsoft Outlook Add-in

Reserve a workplace space in less than a minute without using the Reservation portal. The ServiceNow® Workplace Reservations for Microsoft Outlook Add-in enables you to make a reservation using Microsoft Outlook directly.

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Note: As of Workplace Reservation Management version 3.0.2, you are no longer required to install the Microsoft Outlook Add-in plugin. The advanced search widget in the Workplace Reservation Management 3.0.2 version is used for Outlook Add-in reservations. To use Microsoft Outlook Add-in, install and configure Workplace Calendar Synchronization. Administrators can configure the manifest add-in file to complement integration with Workplace Calendar Synchronization.

Workplace Reservation Management 3.0.2 manifest add-in file for Microsoft Outlook provides enhanced reservation experience and capabilities for employees. Employees can make reservations using multiple Reservable Modules. They can make multi-building, browse near a person, or neighborhood reservations. It provides advanced reservation web portal capabilities within the Microsoft Outlook Add-in manifest file.

Migrate or update to Workplace Reservation Management 3.0.2 version. For more information, see Manage Workplace Reservations for Microsoft Outlook Add-in.

The Workplace Reservations for Microsoft Outlook Add-in application is created on the Seismic workspace and uses Seismic components. The components are stored in the Workplace Service Delivery Components plugin to enhance the employee experience while using the add-in.

As an employee, you can easily reserve a space using Microsoft Outlook directly. The ServiceNow® Workplace Reservations for Microsoft Outlook Add-in provides you the capabilities of the Workplace Reservation Management application within the Microsoft Outlook application. The add-in enables an employee to create an appointment or edit an existing appointment. An employee can find the available spaces easily and request extra services without the need to open a separate application. Only the locations that exist in both the Microsoft Exchange Online and Workplace Reservation Management are displayed for reservation. Only rooms added in the Rooms [sn_wsd_core_room] table are sychronized using the calendar provider. To synchronize spaces, that spaces must be added as rooms in the Rooms [sn_wsd_core_room] table.

The add-in is displayed in the Microsoft Outlook ribbon. When you select the add-in icon, it displays a reservation form in a sidebar. You can configure a manifest file and upload it to the Microsoft Outlook application to view the add-in feature.

As a workplace admin, you can specify the reservable module that you want to use for reservations in the *sn_wsd_msaddin.default_reservable_module* system property. Only one reservable module can be used in the Workplace Reservations for Microsoft Outlook Add-in.

Only the workplace locations that are assigned to the reservable module are displayed to employees while making a reservation. All the reservations and the extra services requested by employees are managed within the Workplace Reservation Management application.

Important: The Workplace Reservations for Microsoft Outlook Add-in application does not support Microsoft Exchange On-Premises.

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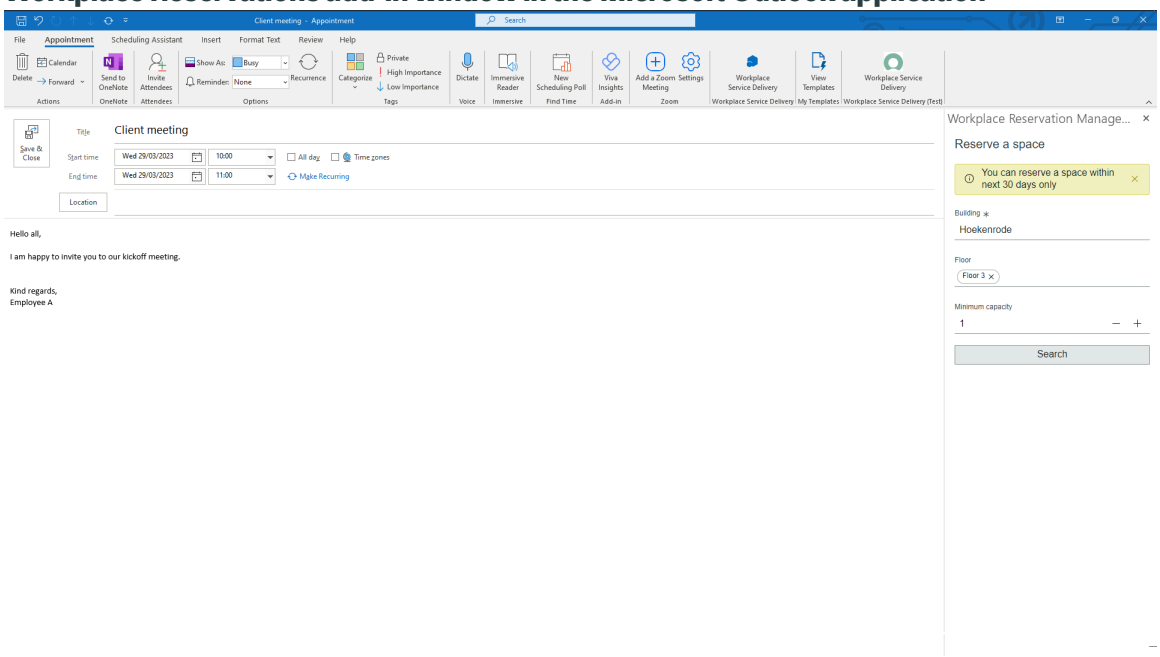
Workplace Reservations add-in window in the Microsoft Outlook application

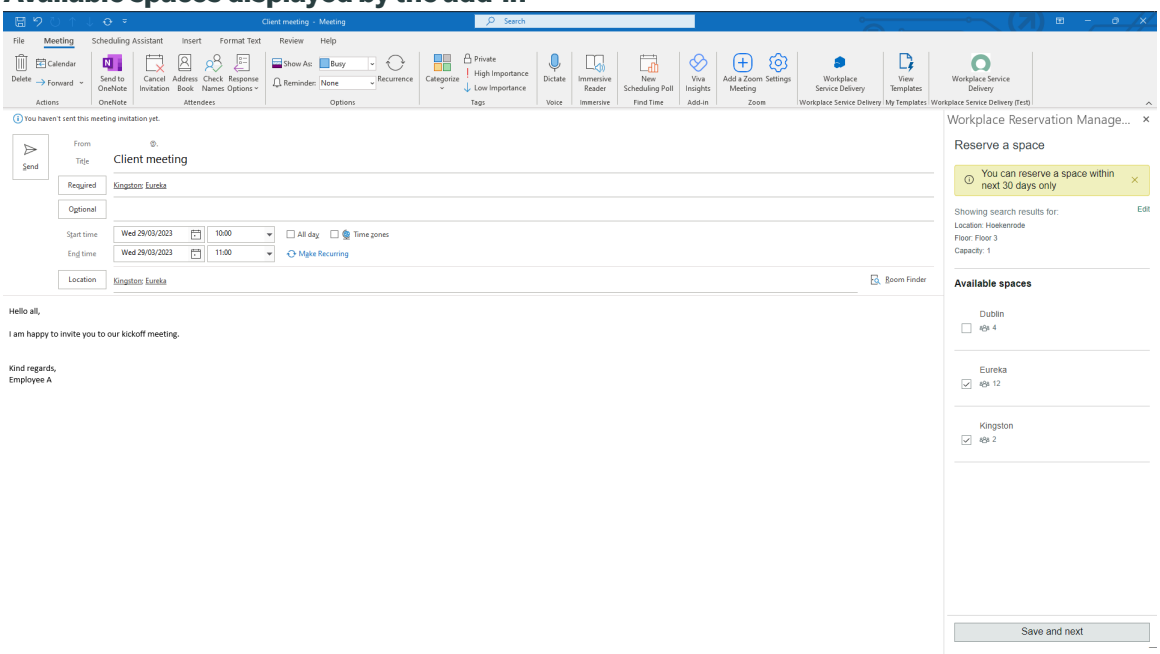


Workplace Reservation Management and the Microsoft Outlook Add-in

As an employee, the add-in enables you to make a reservation without using the Workplace Reservation Management Reservation portal, thus saving time. The add-in reduces the time to search for a location by directly displaying the available locations. The add-in enables you to perform the following actions:

- Find available spaces by applying multiple search criteria.

Available spaces displayed by the add-in



- Add spaces directly to an existing or a new event using the add-in directly.
- Request a reservation for yourself or on behalf of others.
- Make a reservation for any workplace location such as a conference room, parking lot, workspace, desk and more.

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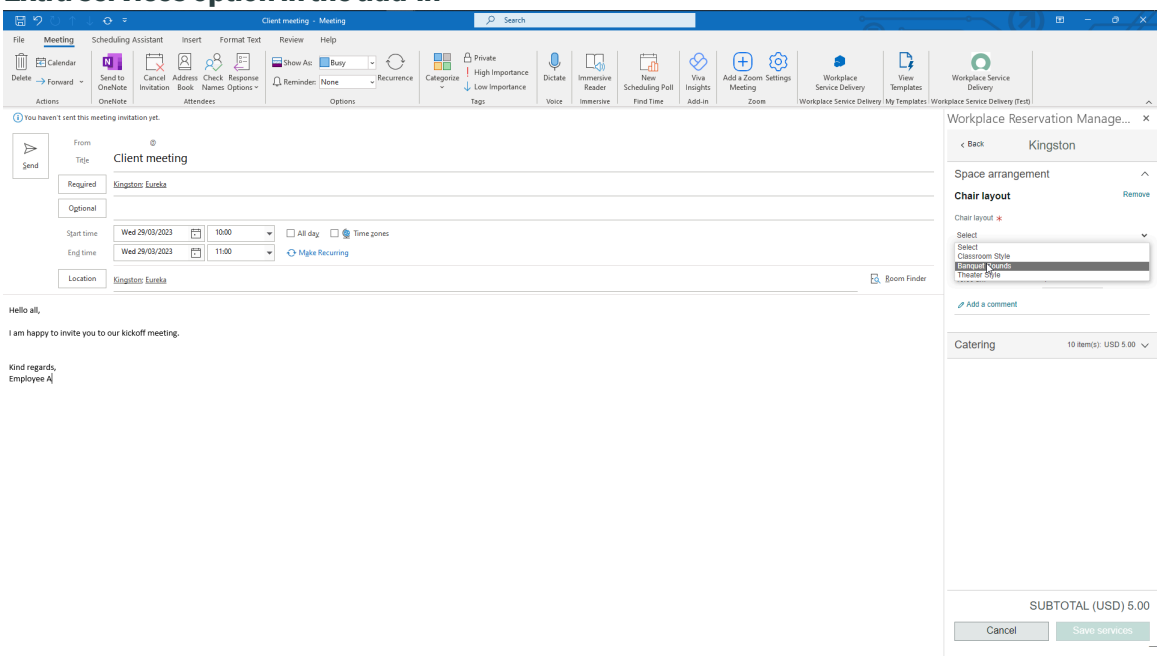
- Make reservation on behalf of a visitor or to meet a visitor.
- Specify the reservation duration.
- Request extra services.

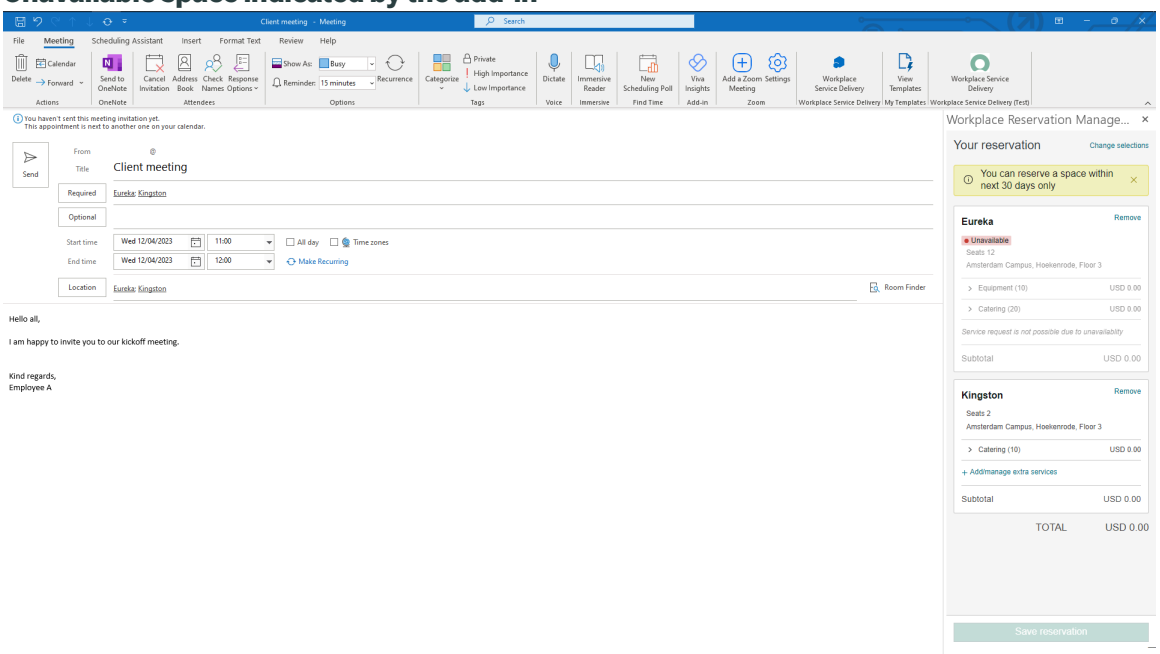
Extra services option in the add-in



- Update an existing reservation or modify the extra services. You can change the location and add/remove services.

If any selected space becomes unavailable for any reason or if the date or time has changed, the add-in indicates the same.

Unavailable space indicated by the add-in



You can use the existing reporting tools available with Workplace Reservation Management application to report any issue.

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Important: Currently, it is not possible to use Microsoft Outlook on the web using the Apple Safari browser. Instead, you can use Mozilla Firefox or Google Chrome.

Workplace Calendar Synchronization

You can also synchronize your reservations with your calendar provider by using the ServiceNow® Workplace Calendar Synchronization application. Enable your employees to make reservations with ServiceNow® Workplace Reservation Management or with your organization's calendar service providers, such as Microsoft Exchange Online.

For more information, refer the following:

- Explore Workplace Calendar Synchronization
- Setup Workplace Calendar Synchronization

Configure Workplace Reservations for Microsoft Outlook Add-in

Install Workplace Reservations for Microsoft Outlook Add-in and configure the manifest file.

Install Workplace Reservations for Microsoft Outlook Add-in

Install the Workplace Reservations for Microsoft Outlook Add-in application from ServiceNow Store applications. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin
Also install the Workplace Service Delivery Components application from the store as the Workplace Reservations for Microsoft Outlook Add-in application is built on the Seismic workspace. The Workplace Service Delivery Components store the components built on Seismic to enhance the experience brought to employees while using the Workplace Reservations for Microsoft Outlook Add-in application.

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
2. Verify that the following plugins are activated:
   - Workplace Core (sn_wsd_core) minimum version 2.6.
   - Latest version of Workplace Reservation Management (sn_wsd_rsv).
   - Latest version of Workplace Calendar Synchronization (sn_wsd_rsvsync).

Use the following details when required:

- Name of the application: Workplace Reservations for Microsoft Outlook Add-in
- ID of the application: sn_wsd_msaddin

Important: The Workplace Reservations for Microsoft Outlook Add-in application uses the credentials used for Microsoft Exchange Online Synchronization.

Role required: admin

Warning: If you are installing the Workplace Reservations for Microsoft Outlook Add-in application in a Windows system, it is required to have the "WebView2 runtime" installed on the client devices. You can download it here: https://developer.microsoft.com/en-us/microsoft-edge/webview2/.

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Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Reservations for Microsoft Outlook Add-in) or ID (sn_wsd_msaddin). If you cannot find the application, you may have to request it from the ServiceNow Store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Reservations for Microsoft Outlook Add-in.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Create a manifest file for Microsoft Outlook Add-in

Create a manifest file and customize it as per your organization standards to configure the add-in in Microsoft Outlook.

Before you begin

Role required: none

Download the sample manifest file *Workplace_Outlook_add_in_manifest_example.xml* along with the Workplace Reservations for Microsoft Outlook Add-in application from the ServiceNow Store. You can also create a manifest file, for more information on how to create a manifest file, refer to the Microsoft documentation.

About this task

In this task, you can create a manifest file by customizing the sample manifest file downloaded from the ServiceNow Store. The parameters in the manifest file that can be customized are explained in the procedure.

Procedure

1. Navigate to the directory where you have downloaded the sample manifest file.
2. Open the manifest file to make customization.
3. In the sample manifest file, change the following parameters as per your organization requirements.

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Parameters in the manifest file that can be customized

Parameter	Description
Id	Unique ID for the add-in. For more ore information, refer to the Microsoft documentation.
DisplayName	Display name of the add-in. The name is displayed in the Microsoft Outlook app ribbon.
Description	Description about the add-in.
IconUrl	Link to the icon image. A Youmoji icon is installed along with the application for the add-in. If you are setting your own icon, ensure that you specify a url linking to the icon. The following icon formats are supported: ○ 16x16 ○ 32x32 ○ 64x64 ○ 80x80
Images	Link to the images used in the add-in.
SupportUrl	Link to a supporting environment.
SourceLocation	Link to a supporting environment. You can link your own environment, or a different website.
Url	Link to the instance where the add-in is installed.

4. Save the manifest file with a different name.

Result
The manifest file for the add-in is created.

What to do next
Perform any of the following actions as per requirement:

- Upload the manifest file for a single user
- Upload the manifest file in Microsoft Office 365

Upload the manifest file for a single user

After you create the manifest file, make it available for usage within Microsoft Outlook. You can upload the add-in for a single user use.

Before you begin
Ensure that you have created a manifest file for the add-in.

Role required: sn_wsd_msaddin.admin

Procedure

1. Open **Microsoft Outlook**.
2. On the Outlook ribbon, click **Get Add-ins**.
3. Select **My add-ins**.
4. In the Custom add-ins section, select **Add a custom add-in** > **Add from file**.

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5. Select the manifest file that you have created for the add-in.
6. Click **Next** > **Install**.

Result

The Workplace Reservations for Microsoft Outlook Add-in is installed. The add-in appears while scheduling a meeting in the Outlook.

Upload the manifest file in Microsoft Office 365

After you create a manifest file, upload it to Microsoft Office 365. You can view and use the add-in Microsoft Office 365 after you upload the manifest file.

Before you begin

Important: The Workplace Reservations for Microsoft Outlook Add-in application does not support Microsoft Exchange On-Premises.

Role required: sn_wsd_msaddin.admin

Procedure

1. Log in to the Microsoft Office 365 with your admin account.
2. Select the app launcher icon in the upper-left and click **Admin**.
3. In the admin center, go to **Settings** > **Services & add-ins**.
4. Select **Deploy Add-in** and click **Next** in the overview page.
5. Select **Upload custom apps**.
6. Select **I have the manifest (.xml) file on this device** check box.
7. Click **Choose file** to select the manifest file that you have created for the add-in.
8. Click **Upload**.
9. In the Assign users section, select one of the following options to specify whom to deploy the add-in.
   - **Everyone**: Select this option to deploy the add-in to everyone.
   - **Specific users/groups**: Select this option to deploy the add-in to only selected users or user groups. Use the search option to find users or groups to whom you want to deploy the add-in.
   - **Just me**: Select this option to deploy the add-in only to you.
10. In the Deployment method section, select an option to specify how to deploy the add-in to users.
11. Click **Deploy**.
    A green tick appears when the add-in deployment is successful. Follow the instructions provided on the page to test if the add-in deployment is successful.
12. Click **Next**.
13. On the final page, click **Cancel** to close the dialog box.

Result

The add-in is uploaded to Microsoft Office 365. The users to whom the add-in is deployed can view the add-in option while scheduling a meeting.

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Make a reservation using Workplace Reservations for Microsoft Outlook Add-in

Schedule an event or appointment in the Microsoft Outlook using the additional features provided by the Workplace Reservations for Microsoft Outlook Add-in application.

Before you begin

- Create a manifest file for Microsoft Outlook Add-in.
- Upload the manifest file. Perform any one of the following actions depending on the usage:
  - Upload the manifest file for a single user.
  - Upload the manifest file in Microsoft Office 365.

Role required: admin

Procedure

1. Open **Microsoft Outlook** application.
2. Perform any one of the following actions depending on what type of reservation you want to make:
   - To create an appointment or event, navigate to **New items** > **Appointment**.
   - If you want to send a meeting invite, navigate to **New items** > **Meeting**.
3. In the Appointment window, select the reservation add-in.
   The add-in opens a side-bar that contains a reservation form.

   Note: The name of the add-in depends on the name specified in the manifest file.

4. Select a date and time for the reservation.

   If **Max days in future** is enabled, and if the start date and end date exceeds the **Max days in future** value, a warning message is displayed to show that reservation can only be made up to the number of days specified in **Max days in future**. The **Max days in future** value is configured on the Reservable module and specifies the maximum number of the days in the future up to which the Reservable module can be reserved.

   Note: If the **Max days in future** value is not enabled, users can select a date as per the **Max number of occurrences** on the Reservable module. For more information, see Configure a reservable module.

   - If an employee clicks open the calendar icon and tries to select a date greater than the **Max days in future** value, the dates are disabled in the calendar date picker.
   - For example, if the **Max days in future** value is 90 days, and if you try to select a date beyond 90 days, then the number of days beyond 90 days is disabled in the calendar date picker.
   - A warning message is shown that you can reserve a space within the next 90 days only. The date defaults to the current date.
   - If an employee manually enters a date that is greater than what is specified in the **Max days in future** value, then the application resets the date to the current date.

   Note: If the number of days for a reservation exceeds the **Max days in future** value, the **Save Reservation** and **Add extra services** options are disabled. The employee is not able to save the selected services. The employee can send out the invitation through Outlook, but no services are added.

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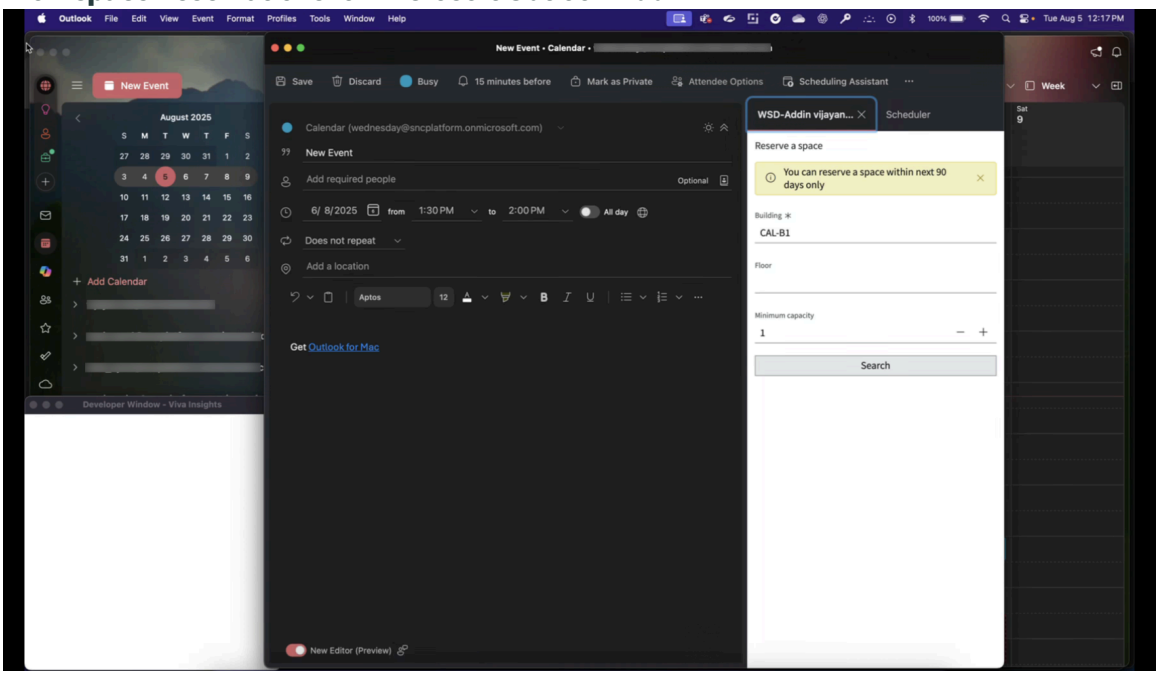
5. In the Reserve a space sidebar, fill in the following fields:

   a. Select the **Building** in which you want to make an appointment.

   b. Select the **Floor** in which you want to reserve a space for the appointment.

   c. Select the required **Capacity**capacity of the space.
   The spaces will be displayed depending on the capacity specified.

Workspace Reservations for Microsoft Outlook Add-in



6. Click **Search**.
   The available spaces are displayed based on the search.
7. Select a space from the list of available spaces.
   You can also select multiple spaces.
8. If you have selected multiple spaces, to mark all the space details as private, select **Make all space details private**.

   Note: The option is displayed based on the privacy settings set on the selected spaces.

9. **Optional:** If you have selected multiple spaces, to set privacy for a space individually, use the **Make space details private** option placed below each space.

   Note: The option is displayed based on the privacy settings set on the space.

10. Click **Save and next**.
11. Click **+Add extra services** to request extra services along with your reservation.
12. **Optional:** If you have selected multiple spaces, select **+Add extra services** under each space separately.
13. In the services form, select from the following services:

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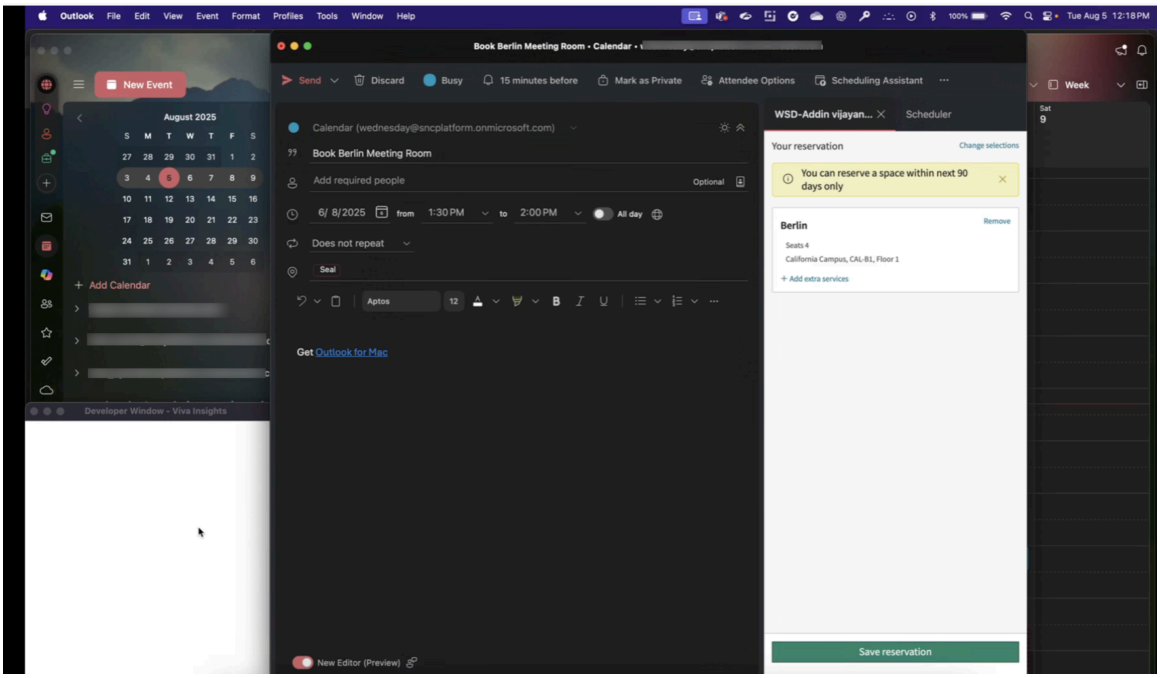
- **Catering**: Option to request food services. Specify breakfast and/or lunch preferences and the quantity required.
- **Equipment**: Option to request any special equipment for the meeting.

14. Click **Save services**.
15. Review your reservation details.
16. To edit your reservation, click **Change reservation**.
17. To edit the extra services requested, click **+Add/manage extra services**.
18. Click **Save reservation**.
    The reservation is created and logged in the Workplace Reservation Management application.

Reservation window in Microsoft Outlook



19. In the Outlook appointment window, click **Send** to send the meeting request.
    The meeting request will be sent to the selected spaces to confirm the reservation.

> **Note:** If Workplace calendar synchronization is installed and personal authentication mode is enabled, a pop-up notification appears if a user does not have a token while attempting to reserve a sync-enabled room. The notification informs the user that the token is not available and instructs them to log in to Microsoft Exchange with the respective email to retrieve the token.

Result

The reservation is created. The reservation is sent only if you send the invite from the Microsoft Outlook window.

Workplace Reservations for Microsoft Outlook Add-in references

Learn more about the role, tables and system properties installed with the Workplace Reservations for Microsoft Outlook Add-in application.

Components installed with Workplace Reservations for Microsoft Outlook Add-in

Several types of components are installed with the Workplace Space Management application, including tables and user roles.

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Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed with Workplace Reservations for Microsoft Outlook Add-in

Roles installed with Workplace Reservations for Microsoft Outlook Add-in

Role title [name]	Description	Contains roles
sn_wsd_msaddin.admin	As a Workplace Reservations for Microsoft Outlook Add-in admin, you can access the application completely.	None

Properties installed with Workplace Reservations for Microsoft Outlook Add-in

Customize the properties available with Workplace Reservations for Microsoft Outlook Add-in.

These properties are available for Workplace Space Management.

Note: All of these properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

Properties for Workplace Reservations for Microsoft Outlook Add-in

Property	Description
sn_wsd_msaddin.default_reservable_module	This property enables you to specify the default reservable module make a reservation. The workplace items of the reservable module are displayed to make a reservation. Specify the sys_id of the reservable module. • Type: String • Default value: **c31241cedb7650106c731dcd13961917**
sn_wsd_msaddin.oauth.debug	This property enables logging of the debug information when using the Microsoft Outlook Add-in page. • Type: String • Default value: **false**
sn_wsd_msaddin.resource_exclude_list	This property enables you to exclude a room if you do not want it to appear in the Microsoft Outlook Add-in page. Specify either the room name or the email id of the room. If you are specifying the room name, ensure that the name is same as configured in the Workplace Reservation Management application.

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Properties for Workplace Reservations for Microsoft Outlook Add-in (continued)

Property	Description
	• Type: String • Default value: <empty>

Workplace Move Management

The ServiceNow® Workplace Move Management application enables your employees to relocate from one location to another without any hassle and without a required manual permission. Manage and fulfil employee move requests in simple steps.

Get started

Explore Learn about Workplace Move Management concepts and features.	**Configure** Install and Configure Workplace Move Management.
Manage Manage Workplace Move Management location records.	**References** Work with Workplace Move Management roles, properties, and components.
Analytics and Reporting Solutions Coordinate work and improve processes with dashboards and reports.	

Exploring Workplace Move Management

Manage and fulfill employee requests with Workplace Move Management.

Enable employees to collaborate, communicate, and easily manage space changes from start to finish. As an employee, you can submit a request using the Workplace Service Portal. As a manager, you can make requests directly through the application.

As a manager, the automated process helps you to closely supervise the movement of employees and their belongings with minimal to no disruption. You can fulfill move requests through move cases and associated tasks. You can view the move requests raised by employees, and approve or reject a request anytime. The application enables you to identify seating conflicts while fulfilling move requests.

As an employee, raise a move request to move from one place to another using the Workplace Service Portal. Move to another space located in the same building or a different building. You can perform the following actions:

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- Raise a move request for yourself or for a co-worker.
- Select a reason for move.
- Select a date on which you want the movement to be implemented.
- Specify the 'From' and 'To' location. You can also select a workplace directly on the floor map of the building.
- Select equipment that must be moved along with the request.
- Specify any extra information or instruction if required.

As an admin, the Workplace Move Management application enables you to perform the following actions:

- Raise a move request for an employee directly using the application rather than using the Workplace Service Portal.
- Monitor the move requests that are created in the application. Identify seating conflicts while processing move requests.
- View or modify move requests or move tasks that are assigned to you, the ones that are currently open, and also all the move requests.
- Automate and configure approvals for those move requests that require permissions.
- Send email notifications to relevant stakeholders regarding the move requests when required.
- Modify, approve, or reject a planned or ongoing move request.

Workplace Central - Move management

Group multiple move requests under a move project and track their progress at a time using the Workplace Central Move Management workspace. For more information, refer to Move Management.

Configuring Workplace Move Management

Install and configure Workplace Move Management for workplace users.

Install Workplace Move Management

Install the Workplace Move Management application from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.

2. Verify that the following plugins are activated:
   - Workplace Core (sn_wsd_core) minimum version 2.6.2.
   - Workplace Case Management (sn_wsd_case)

Use the following details when required:

- Name of the application: Workplace Move Management
- ID of the application: sn_wsd_move

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Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Move Management) or ID (sn_wsd_move). If you cannot find the application, you may have to request it from the ServiceNow Store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Move Management.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Managing Workplace Move Management requests

As an admin, you can create or edit workplace services and record producers related to move requests. You can create or edit move tasks to fulfill a move request case.

The **Request a desk change** service is a default workplace service in the Workplace Service Portal. Employees can use this service to submit a move request.

A workplace service, **Request an employee's desk change** is by default available in the application. The service can be accessed only by the admin or the workplace manager.

To create a move-related workplace service, refer to Create a Workplace service. To configure and link the workplace service to a record producer, refer to Configure a Record producer.

As a workplace manager, the application enables you to also implement the actions that are available in the Workplace Case Management and the Workplace Core.

For example, in the Workplace Case Management application, you can do the following:

- Create a move-related workplace service and link it to a record producer. You can also create a record producer if required.
- Configure Case and Task templates for workplaces cases.
- Create child move cases and tasks if required.

And in the Workplace Core application, you can do the following:

- Create knowledge base articles for employees and publish them.
- View the knowledge base articles created in the application and modify an article whenever required.

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You can also group multiple move requests under a move project and track their progress at a time using the Workplace Central Move Management workspace. For more information, refer to Move Management.

Create a move request on behalf of an employee

Create a move request on behalf of an employee from the application directly instead of using the Workplace Service Portal.

Before you begin

Role required: sn_wsd_move.manager

About this task

Specify the current location or current desk that the employee is moving from, and the target location or target desk that the employee is moving to. Select the date of movement and the reason for moving. You can also provide extra information related to the move if required.

Procedure

1. Navigate to **All** > **Workplace Move Management** > **Move requests**.
2. Click **Create new**.
3. On the form, fill in the fields.

Request an employee's desk change form

Field	Description
On behalf of	Name of the employee for who you are raising the move request. If you are raising the move request for yourself, select your name.
Requested move date	Date on which the movement must be completed. Select a date from the calendar.
Move reason	Reason for moving from the current location. Select from the list of available reasons.
From:	
Region	Region where the current desk is located.
Site	Site where the current desk is located.
Campus	Campus in which the current desk is located.
Building	Building in which the current desk is located.
Floor	Floor on which the current desk is located.
Neighborhood	Neighborhood in which the current desk is located. This field is applicable only when the move case is created from Scenario Planning.
Space	Space in which the current desk is located.
To:	
Region	Region where the target desk is located.
Site	Site where the target desk is located.

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Field	Description
Campus	Campus in which the target desk is located.
Building	Building in which the target desk is located.
Floor	Floor on which the target desk is located.
Neighborhood	Neighborhood in which the target desk is located. This field is applicable only when the move case is created from Scenario Planning.
Space	Space in which the target desk is located.
What should be moved?	Items to be moved from the current desk to the target desk.
Additional notes	Extra information regarding the move request.

4. Click **Submit**.

Result
The move request is submitted to change the employee's desk. If there are personal items such as communication equipments, ergonomic furniture, or any personal belongings to be moved to the new location, then the **Move personal items** workplace service-related service activities are performed.

If the state is set to Closed incomplete, it means that the move request could not be completed due to various reasons. As a manager, you can review if there are any conflicts with the move request in the Conflicts review related list.

What to do next
To view and monitor move requests created by you on behalf of an employee or for yourself, see View move requests.

Raise a move request for a space change

Create a move request to relocate to another space. Specify why you want to move and when you want to move. You can select a space that is located in your current building or at a different building. You can also select a desk directly on the floor map.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure
1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. Open the **General** category where the workplace service is located, do the following:
   a. Click **Catalog**.
   b. Click **Browse by Categories**.

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c. In the Workplace Services Catalog, select **General**.

> **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.

3. Select **Request a desk change**.
4. On the form, fill in the fields.

Request a desk change form

Field	Description
Employee name	Name of the employee for whom you are raising the move request. If you are raising the request for yourself, select your name.
When is the requested move date?	
Date	Date on which the movement must be completed. Select a date from the calendar.
Select a move reason	Reason for moving from the current location. Select from the list of available reasons.
From:	
Find a space on a floor	Option to directly select the current space on the floor map.
Building	Building in which the current desk is located.
Floor	Floor on which the current desk is located.
Space	Space in which the current desk is located.
To:	
Find a space on a floor	Option to directly select the new target desk on the floor map. If employees have a permanent assignment in their workplace profile, the employee names are displayed on the map for a selected space. For more information, see Display permanent seat assignments on floor maps.
Building	Building in which the target desk is located.
Floor	Floor on which the target desk is located.
Space	Space in which the target desk is located.
What should be moved?	Items to be moved from the current desk to the new target desk.
Anything else we should note?	Extra information regarding the move request.

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Field	Description
Add attachment	Attached files that support the move request if required.

5. Click **Submit**.

Result
The move request is submitted.
If the state of the move request is Closed complete, it means that the move request has been completed successfully. If the state is set to Closed incomplete, it means that the move request could not be completed due to various reasons. You can raise another request if required.

Depending on your platform, do one of the following to view your requests:

- On the Workplace Service Portal, go to the **Requests** tab to view your requests and reservations.
- On the Now Mobile app's navigation bar, tap **For Me** and scroll down to the My Request section to view your requests.
- In the virtual agent chat, type your question or select **Show Me Everything** to select from a list of available options.

If you want to cancel a request, Click **Cancel Request**. When the request is resolved, select **Accept** or **Reject**.

Update a move request workplace service

As a workplace manager, modify a move request that is created in the Workplace Case Management application. You can add move tasks, edit a task template, add child move cases, and more.

Before you begin
Ensure that you have the following applications installed:

- Workplace Core
- Workplace Case Management.

Role required: sn_wsd_case.manager or workplace manager

Procedure
1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Workplace services**.
2. Select any of the following move-related workplace services that you want to edit:
   - **Workplace Move Service**
   - **Move Employee Personal Items**
3. On the form, edit the fields that you want to update.
   For more information about each field on the form, see Create a Workplace service.
4. **Optional:** To edit a workplace service activity, go to the Workplace Service Activity related list and select the workplace service activity that you want to edit.
   For more information about each field on the form, see Create a Workplace service activity.
5. Click **Update**.

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Result
The workplace service is updated.

Update a move-related workplace service record producer

Update a move-related workplace service record producer. Link a workplace service to one or more record producers.

Before you begin
Ensure that you have the following applications installed:

- Workplace Core
- Workplace Case Management

Role required: sn_wsd_case.manager or workplace manager

About this task
After a workplace service is created, the service is linked to a record producer. The record producer is displayed to employees when the employee tries to select the workplace service.

Procedure

1. Navigate to **All** > **Workplace Case Management** > **Workplace Case Management - Setup** > **Record Producers**.
2. Select any of the following record producers which you want to edit:
   - **Request a desk change**
   - **Request an employee's desk change**
3. On the form, edit the fields that you want change.
   For more information about each field on the form, see Configure a Record producer.
4. Click **Update**.

Result
The record producer is updated.

Create a move-related knowledge base article

Create a knowledge base article so that you can provide move-related information or notices to employees.

Before you begin
Ensure that you have the following applications installed:

- Workplace Core
- Workplace Case Management.

Role required: sn_wsd_core.admin or sn_wsd_core.kb_writer

Procedure

1. Navigate to **All** > **Workplace Core** > **Knowledge management** > **Create new article**.
2. Select **New**.
3. On the form, fill in the fields.

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Knowledge form

Field	Description
Knowledge base	Name of the knowledge base. Select the **Workplace services** knowledge base.
Category	Relevant category for the knowledge base article. Select an existing category, or select the add category icon (⊕) to add a new category. You can also select or add a subcategory.
Valid to	Date until which the knowledge base article is valid. The date is automatically set to 2100 - 01 - 01.
Article type	Type of article, which you want to create. Choices are as follows: ○ Select **Wiki** to create a wiki page. ○ Select **HTML** to create an html web page.
Workflow	This field is automatically set as **Draft**. Depending on the progress, the workflow of the knowledge base article changes to the following states: ○ Review ○ Published ○ Pending retirement ○ Retired
Attachment link	Option to give an attachment for the knowledge base article.
Display attachments	Option to display the attachments individually.
Short description	Short description for the knowledge base article. The short description is displayed as the title of the article.
Article body	Information that is displayed in the knowledge base article. Use the formatting options to change the style of the content. This field appears only if **HTML** is selected from the **Article type** field.
Wiki	Information that is displayed in the knowledge base article as a wiki. Select the **Wikitext** option to preview the text. This field appears if **Wiki** is selected from the **Article type** field.

4. **Optional:** To search existing articles for any duplicate content, select **Search for Duplicates**.
5. Select **Submit**.

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Result
The knowledge base article is created.

What to do next
Create a workplace knowledge base article

Review move conflicts

You can review the reason behind a move request conflict and decide how to resolve the conflict.

If the state of a move request is set to Closed incomplete, it means that the move request couldn't be completed due to various reasons. As a move manager, you can review if there are any conflicts with the move request in the Conflicts review related list.

The different types of conflicts are as follows:

- **Selected destination location is not active**: Conflict due to inactive to location selected to move.
- **Selected destination location is already occupied**: Conflict due to unavailability of the location selected to move.
- **The cost centre/department of user and the selected destination location does not match**: Conflict due to mismatch in the user's cost centre/department and the location selected to move. The conflict is considered based on the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] system property
- **The selected destination location is a flexible location**: Conflict due to the location that is selected to move is a flexible location.
- **Created a workplace move request for a space that is a workplace profile of another user**

You can also customize the list of validations that you want to run on a move request. You can add validations or change existing validations in the *WSDMoveRequestValidations* script include.

Analytics and reporting solutions for Workplace Move Management

Raise a move request on behalf of an employee, update a move request workplace service or a move-related workplace record producer, or create a move-related knowledge base article with Workplace Move Management

Create, update, or raise a move request on behalf of an employee.

View move requests

Monitor the move requests that are assigned to you, the requests that are currently open, and all the other requests that are created in the application.

Before you begin
Role required: sn_wsd_move.manager

Procedure

1. Navigate to **All** > **Workplace Move Management** > **Move requests**.
2. To view move requests, select any of the following options:
   - **Assigned to me**: Select this option to view the move requests that are assigned to you.
   - **Open requests:** Select this option to view open move requests.
   - **All move requests**: Select this option to view all the move requests.

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3. **Optional:** Scroll down to the Related list section to check the status of the following types of items:
   - Child cases
   - Child tasks
   - Approvers
   - Case SLAs
   - Associated knowledge base articles
   - Related cases
   - Conflicts review

View move tasks

Monitor the move-related tasks that are created in the application to fulfill a move request. View the move tasks assigned to you, the tasks that are currently open, and all the move tasks created in the application.

Before you begin

Role required: sn_wsd_move.manager

Procedure

1. Navigate to **All** > **Workplace Move Management** > **Move tasks**.
2. To view move tasks, select any of the following options:
   - **Assigned to me**: Select this option to view the move tasks that are assigned to you.
   - **Open tasks:** Select this option to view open move tasks.
   - **All move tasks**: Select this option to view all the move tasks.

Workplace Move Management references

Several components and properties are installed with Workplace Move Management.

Many Roles, tables, and properties are installed with Workplace Move Management.

Components installed with Workplace Move Management

Several types of components are installed with the Workplace Move Management application, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed with Workplace Move Management

Roles for Workplace Move Management

Role title [name]	Description	Contains roles
Workplace move admin [sn_wsd_move.admin]	As a Workplace Move Management admin, you	sn_wsd_move.manager

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Roles for Workplace Move Management (continued)

Role title [name]	Description	Contains roles
	can access the application completely.	
Workplace move manager [sn_wsd_move.manager]	As a Workplace Move Manager, you can access the application completely.	• sn_wsd_move.agent • template_editor_global
Workplace move agent [sn_wsd_move.agent]	• Create, read, update, and delete Move tasks. • Create, read, update, and delete Move cases. • Create knowledge base articles.	• sn_wsd_move.writer • flow_operator • sn_wsd_core.kb_writer
Workplace move writer [sn_wsd_move.writer]	• Create, read, update, and delete Move tasks. • Create, read, update, and delete Move cases.	• sn_wsd_move.reader • sn_wsd_case.case_writer
Workplace move reader [sn_wsd_move.reader]	Has read permissions to access the following: • Move tasks • Move cases	sn_wsd_case.case_reader

Tables installed with Workplace Move Management

Tables for Workplace Move Management

Table	Description
Workplace Move Case [sn_wsd_move_case]	Stores information about all the move cases and child move cases created in the application. **Note:** This table is a child table of Workplace tasks [sn_wsd_core_workplace_task] in Workplace Core. If **WSD: Archive old workplace tasks** archival rule is applied then Workplace Move Case [sn_wsd_move_case] table is also archived. For more information, see Apply the archive rule.
Move Request Conflict [sn_wsd_move_request_conflict]	Stores information about all the move conflicts that occurred while agents were fulfilling a move request in the application.

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Tables for Workplace Move Management (continued)

Table	Description
Workplace Move Task [sn_wsd_move_task]	Stores information about all the move tasks and child move tasks created in the application. **Note:** If **WSD: Archive old workplace tasks** archival rule is applied then Workplace Move Task [sn_wsd_move_task] table is also archived. For more information, see Apply the archive rule.

Workplace Service Delivery for Mobile

Access your workplace-related services and other information on your mobile device using the ServiceNow Workplace Service Delivery for Mobile.

Get started

Explore Learn about Workplace Service Delivery for Mobile concepts and features.	**Configure** Configuration required for Workplace Service Delivery for Mobile.
Using Use Workplace Service Delivery for Mobile to make a reservation, get directions to a workplace and more.	**Reference** Get details about components like fields, tables, and properties.

Exploring Workplace Service Delivery for Mobile

Manage your workplace reservations using the ServiceNow Now Mobile app.

Install and configure the Workplace Service Delivery for Mobile plugin on your ServiceNow instance. Install the application separately as it is not available within the Workplace Service Delivery suite.

Use the workplace services provided by your organization on your mobile directly. The Workplace Service Delivery for Mobile for Mobile application enables you to do the following:

- Manage your workplace service requests at any time using your mobile device.
- Make single or multiple reservations for workplaces.
- Make multi-day reservations.
- Reserve a neighborhood space.
- Scan the QR code and quickly reserve a space.

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- Get directions to your workplace.
- Check in and check out your reservations.
- Search for locations based on standard services and reservable purposes.
- Review, edit, and cancel your reservations.
- Search for a campus, building, and a space using AI search.
- View meeting notes added to a reservation, if applicable.

Note: Using the application, you can create, edit, cancel, check in, and check out a reservation. But you cannot create a recurring reservation or group reservation using the application.

Configure Workplace Service Delivery for Mobile

Configure Workplace Service Delivery for Mobile to make reservations using the Now Mobile app.

Install Workplace Service Delivery for Mobile

Install the Workplace Service Delivery for Mobile application from the ServiceNow® Store .

Before you begin

Complete the following setup instructions.

1. Navigate to **Subscription Management** > **Subscriptions** in your instance. The list displays the subscriptions that your organization has purchased.
2. Verify that the following plugins are activated:
   - Workplace Core
   - Workplace Reservation Management

Use the following details when required:

- Name of the application: Workplace Service Delivery for Mobile
- ID of the application: sn-wsd-mobile

Role required: admin

Procedure

1. Activate and install plugin for Workplace Service Delivery for Mobile from the ServiceNow® Store.
2. After installing the application, navigate to **System Applications** > **All Available Applications** > **All**.
3. Find the application using the filter criteria and search bar.
   Search for the application by its name Workplace Service Delivery for Mobile) or ID (app-wsd-mobile).
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed.

Mobile Wayfinding Administration

Configure map providers to enable Workplace Service Delivery for Mobile users to get directions to another workplace easily.

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Mobile wayfinding functionality is available for mobile users.

Note: Indoor Mapping spatial map data and objects can be integrated in Workplace Service Delivery and viewed using responsive mobile.

- Create a custom Map provider. Configure Indoor mapping as your map providers so that directions are displayed from one location to another.

  For more information, see Configure a custom Map provider.

- Configure a custom Map screen. Configure map screens for wayfinding.

  For more information, see Configure a custom map screen.

- Indoor Navigation User profile: Use an employee's workplace profile for wayfinding. The Get directions option appears based on these conditions.
  - Employee must have a floor map configured Indoor Mapping or Mappedin.
  - Indoor wayfinding-My Reservation: Get directions to a location from the reservation details page. The specified location must have a floor map defined to view the **Get Directions** option. For more information, see Get directions to a workplace.

  Employees must have an ongoing reservation. If there is no reservation, the location specified in the employee's workplace profile is used.

Configure a custom map screen

Configure a map screen to see location-based information on a map from a mobile app. The map highlights points of interest and users can switch between a map view and list view.

Before you begin

Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Space Mapping** > **Mobile Wayfinding Administration** > **Custom Map Screen**.
2. Provide the Custom map screen name and description.
3. On the form, complete the following form field information

Field	Description
Icon	Place type icon. Search using the search icon ().
Empty State	Add an image, text, and buttons to direct users to perform an action, view a particular screen, or review specific information. Config ure an empty state to inform users that a page currently does not contain data.
Default provider	Select a custom map provider (Indoor Map ping or Mappedin. For more information, see Configure a custom Map provider and to enable indoor position (blue dot) experi ence automatically on a map to show the blue

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Field	Description
	dot from the start to the end destination for wayfinding.

4. Click **Submit**.

Result
Map screens displays a map with locations that are associated to the records in a data item.

Configure a custom Map provider

Configure map providers so that directions are displayed from one location to another in Workplace Service Delivery for Mobile

Before you begin
Ensure that you have the following:

- Workplace Service Delivery for Mobile.
- Indoor Mapping is the inbuilt map provider with the Workplace Service Delivery application.
- Mappedin is a third-party map provider.

Note: You must configure a map provider for each building individually.

Role required: sn_wsd_core.admin

Procedure
1. Navigate to **All** > **Space Mapping** > **Mobile Wayfinding Administration** > **Custom Map Provider**.
2. Click **New**.
3. On the form, fill in the fields.

Custom Map Provider

Field	Description
Key table	Table entry for which you want to configure the map provider. f you have selected Building [sn_wsd_core_building] from the list.
Key	Table entry for which you want to configure the map provider. For example, if you have selected Building [sn_wsd_core_building] as your key table. Search for a document on the Select the document dialog box that appears.and select, Building:BuildingC. Search using the lookup list icon ( ).
iOS location provider	Location provider for iOS. Select **Apple** or **Atlas** as the location provider.
Android location provider	Location provider for Android. Select **Atlas**.
Application	Name of the application. This field is auto-generated.

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Field	Description
	Ensure that the application is set to **Workplace Core**.
Map provider	From the drop-down list, select any of the following based on the map provider that you are using: ○ **ServiceNow**: For Indoor Mapping. ○ **Mappedin**: For Mappedin
Location provider app id	Location provisioning In IndoorAtlas for indoor positioning or blue dot experience. From your Atlas account, navigate to **Apps** > **IA support** > **API Key** and copy the API key id. This option is available only if you have selected **ServiceNow** (Indoor Mapping) as your map provider. **Note:** If you have Apple as your location provider, then, this is an optional step for you. Location app Id Shows the current location or positioning of employees (bluedot experience) on the maps. The start location in wayfinding is automatically determined by the application. If location positioning is enabled, you can see the positioning icon ( ) on your mobile app for wayfinding.
Location provider app secret	From your Atlas account, navigate to **Apps** > **IA support** > **API Key** and copy the API key secrete id. This option is available if you have installed Indoor Mapping as your **Note:** If you have Apple as your location provider, then you are not required to fill this field information. This option is available only if you have selected **ServiceNow** (Indoor Mapping) as your map provider
Map provider app id	User name for Mappedin. Available only if you have installed Mappedin as your map provider. To find the user name, navigate to **Space Mapping** > **Mappedin Administration** > **Credentials**. Select **Mappedin Credentials** and copy the user name.

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Field	Description
Map provider app secret	App secret of the map provider (Mappedin). Available only if you have installed Mappedin as your map provider.

4. Click **Submit**.
   The custom map provider is configured for the table entity that you selected. For example, the map provider shows directions for locations in Building1.The custom map provider is configured for the table entity that you selected. For example, the map provider shows directions for locations in Building1.

   Note: The **CustomMapConfigId** is mapped with sys Id of mapped reservations of Indoor Mapping and Mappedin. To get Indoor Mapping maps, users must update **CustomMapDefaultProviderId** and **CustomMapConfigId** in both **location_custom_map** and **locations_custom_map**. The **CustomMapDefaultProviderId** is the sys Id of Indoor Mapping associated record in the custom map provider. For more information, see Enable map view to create reservations.

   For more information on how to select a map provider map properties, see Customize the map properties.

Enable map view to create reservations

Enable map view for mobile employee users so that they can reserve spaces using floor maps Now Mobile app.

Before you begin
Role required: sn_wsd_core.admin

About this task
Activate the Enable Map view option. Users can view maps supported by Indoor Mapping or Mappedin while reserving a space.

Procedure
1. Navigate to **All** > **Space Mapping** > **Custom Map Provider** to modify the base system map provider.
   Modify the base system map provider to use one of your buildings as a key and use either your Workplace Indoor Mapping or Mappedin credentials.
2. Mappedin: If your Map provider is Mappedin, perform the following steps:

   a. Open the base system custom map provider record.
   This record does not have a name. If your system has multiple custom map providers, you have to identify this record by its sys_id. To check the sys_id of a record, right-click the record, select **Copy sys_id** from Additional Actions on top left , and paste the sys_id **c5d49d2265072010f87794bf508527f6** into a text document.

   b. Modify the following fields on the Custom Map Provider form:

Custom Map Provider form

Field	Description
Key	Table entry for which you want to configure the map provider. For example, Building1.

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Field	Description
Map provider app id	User name for the Mappedin credentials. To find the user name, navigate to **All** > **Space Mapping** > **Mappedin Administration** > **Credentials**. Select your Mappedin Credentials and copy the user name.
Map provider app secret	Your map provider's (Mappedin) app secret credentials.

c. Select **Update**

d. For Mappedin, update **CustomMapDefaultProviderId** and **CustomMapConfigId** in both location_custom_map and locations_custom_map with corresponding Sys IDs.

e. Navigate to **All** > **sys_sg_input_list** to open the Inputs page.

f. Select and open the **location_custom_map** and **locations_custom_map** and make the following changes for both these properties:

i. On the Location Map View and Locations Map view page, Edit the **CustomMapDefaultProviderId** and verify that it is mapped with sys id of Mappedin associated record on the Custom map provider page (see step 2a).

ii. Edit the **CustomMapConfigId** and verify that it is mapped with sys id of sys_sg_custom_map_config.list. To copy the sys_id, navigate to **All** > **sys_sg_custom_map_config.list**. Select **Mapped Reservations** and copy the sys_id and then paste it for **CustomMapConfigId**.

3. If you have installed Indoor Mapping as your map provider, perform the following steps:

a. Navigate to **All** > **Space Mapping** > **Custom Map Provider** to modify the base system map provider.

b. A new map provider **ServiceNow** is created for Workplace Indoor Mapping in the Custom Map Provider.

c. Open the base system custom map provider record to edit.

d. Right-click the record, select **Copy sys_id** from Additional Actions on top left, and paste the sys_id **5a0a15aac35301100f926ff4c840dd9a** into a text document.

e. Modify the following fields on the Custom Map Provider form:

Custom Map Provider form

Field	Description
Key table	Building (sn_wsd_core_building) that is integrated with Workplace Indoor Mapping. Selecting a building to enable map functionality for all other Workplace Indoor Mapping buildings.

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Field	Description
Key	Workplace Indoor Mapping building name. For example: Building A.
Map provider	Select **ServiceNow** from the drop-down list.

f. Click **Update**.

g. To get Workplace Indoor Mapping maps, user needs to update **CustomMapDefaultProviderId** and **CustomMapConfigId** in both location_custom_map and locations_custom_map with corresponding sys ids.

h. Navigate to **All** > **sys_sg_input_list** to open the Inputs page.

i. Select and open the **location_custom_map** and **locations_custom_map** and make the following changes for both these properties:

   i. On the Location Map View and Locations Map view page, Edit the **CustomMapDefaultProviderId** and verify that it is mapped with sys id of ServiceNow associated record in Custom map provider page (see step 3c).

   ii. Edit the **CustomMapConfigId** and verify that it is mapped with sys id of sys_sg_custom_map_config.list. To copy the sys_id, navigate to **All** > **sys_sg_custom_map_config.list**. Select **Mapped Reservations-Indoor Map** and copy the sys_id and then paste it for **CustomMapConfigId**.

4. Click **Update**.
5. Navigate to **All** > **Workplace Service Delivery for Mobile** > **Properties**.
6. Navigate to the Enable Map view option for WSD Mobile Reservations property.
7. Select the Enable Map view option for WSD Mobile Reservations property to enable it.
8. Select **Save**.

Result

Option to view a floor map using the Map view instead of a list view is available for Workplace Service Delivery for Mobile users. You can use the **Toggle map view** option while making a reservation to view floor maps and select spaces. For more information, see Configure the Toggle map view property.

Configure the Toggle map view property

Configure the Toggle map view option on the Now Mobile app app while reserving a space.

Before you begin

Role required: sn_wsd_rsv.admin

Procedure

1. Navigate to **All** > **Workplace Service Delivery for Mobile** > **Properties**.
2. Enable the edit options on the Mobile Properties page.
3. From the **Enable Map view option for WSD Mobile Reservations** drop-down list, select the following options as required:

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a. Disabled: The **Toggle Map view** option is not available while making a reservation.

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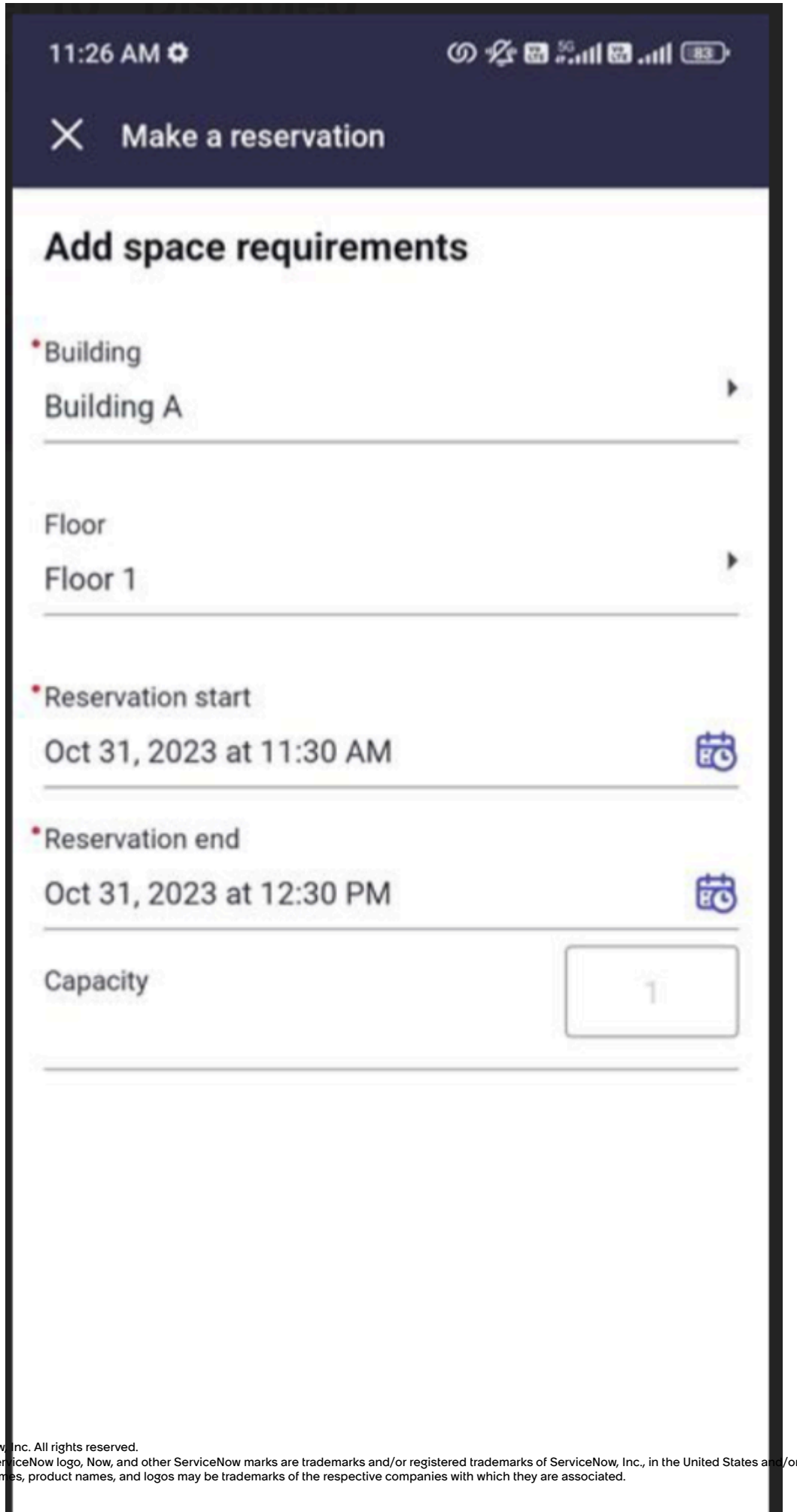

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b. Enabled: The **Toggle Map view** option is visible and not selected (checked).

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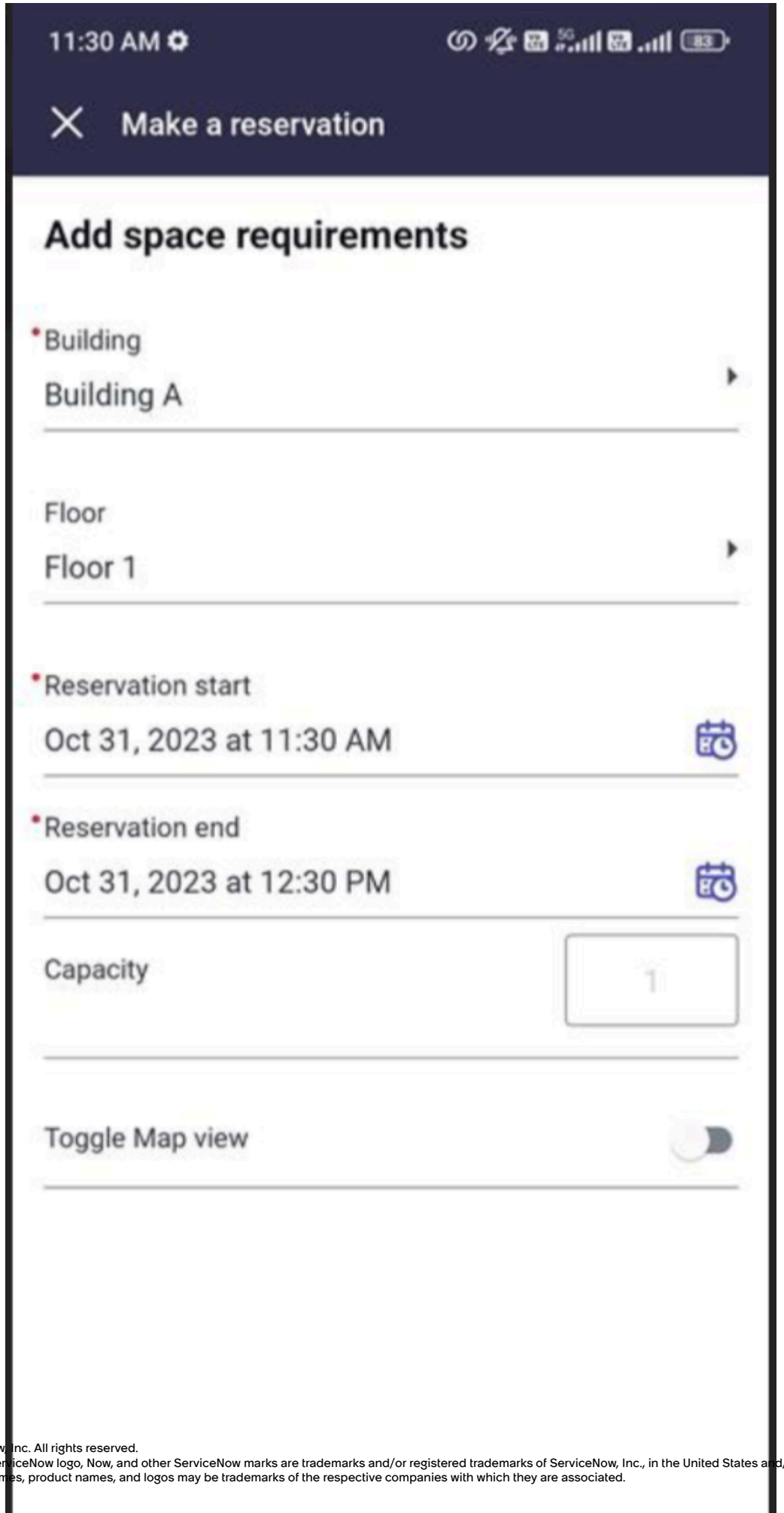

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c. Default: The **Toggle Map view** option is available and selected (checked).

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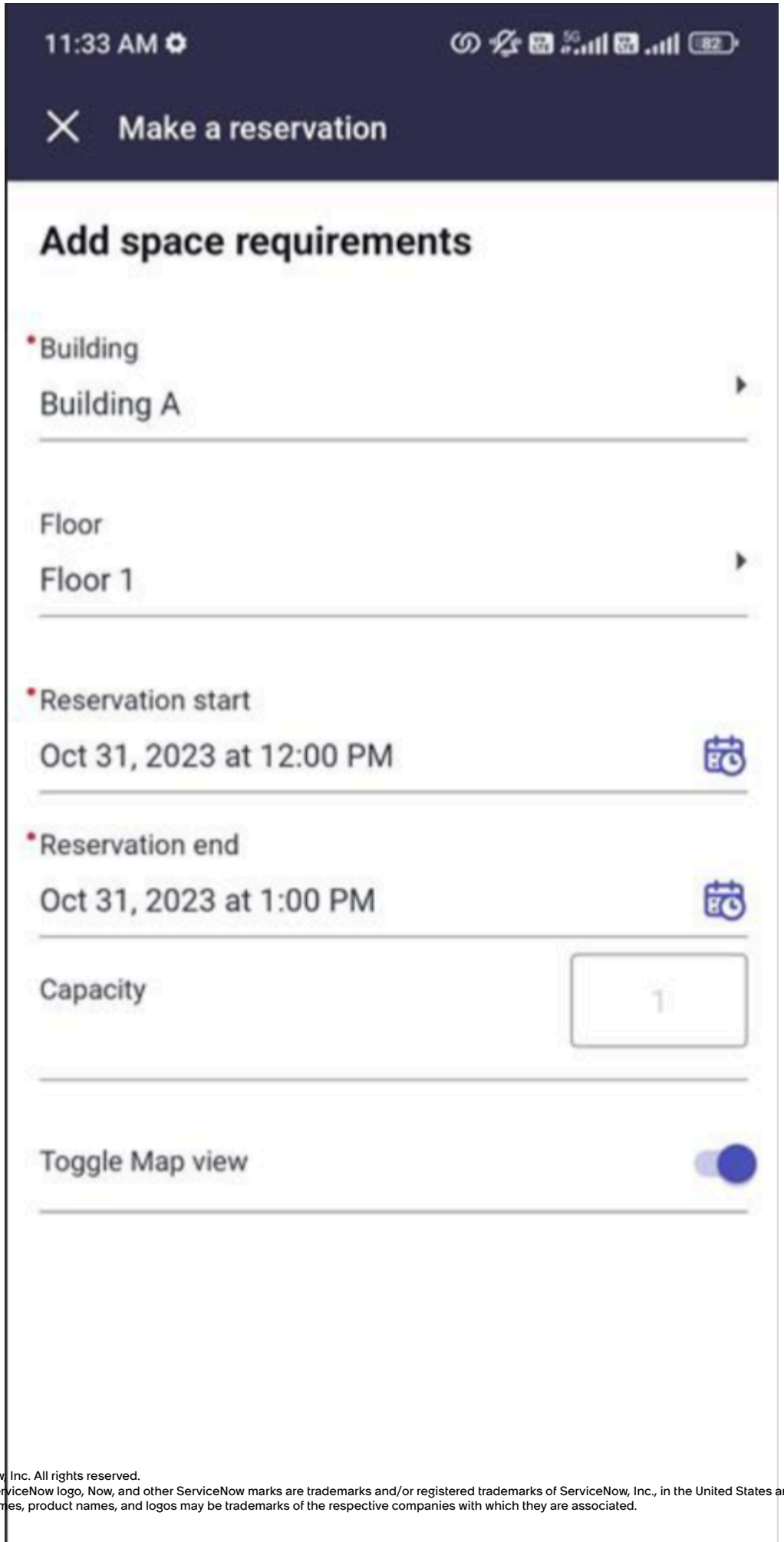

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d. Required: The **Toggle Map view** option is available but set to read-only.

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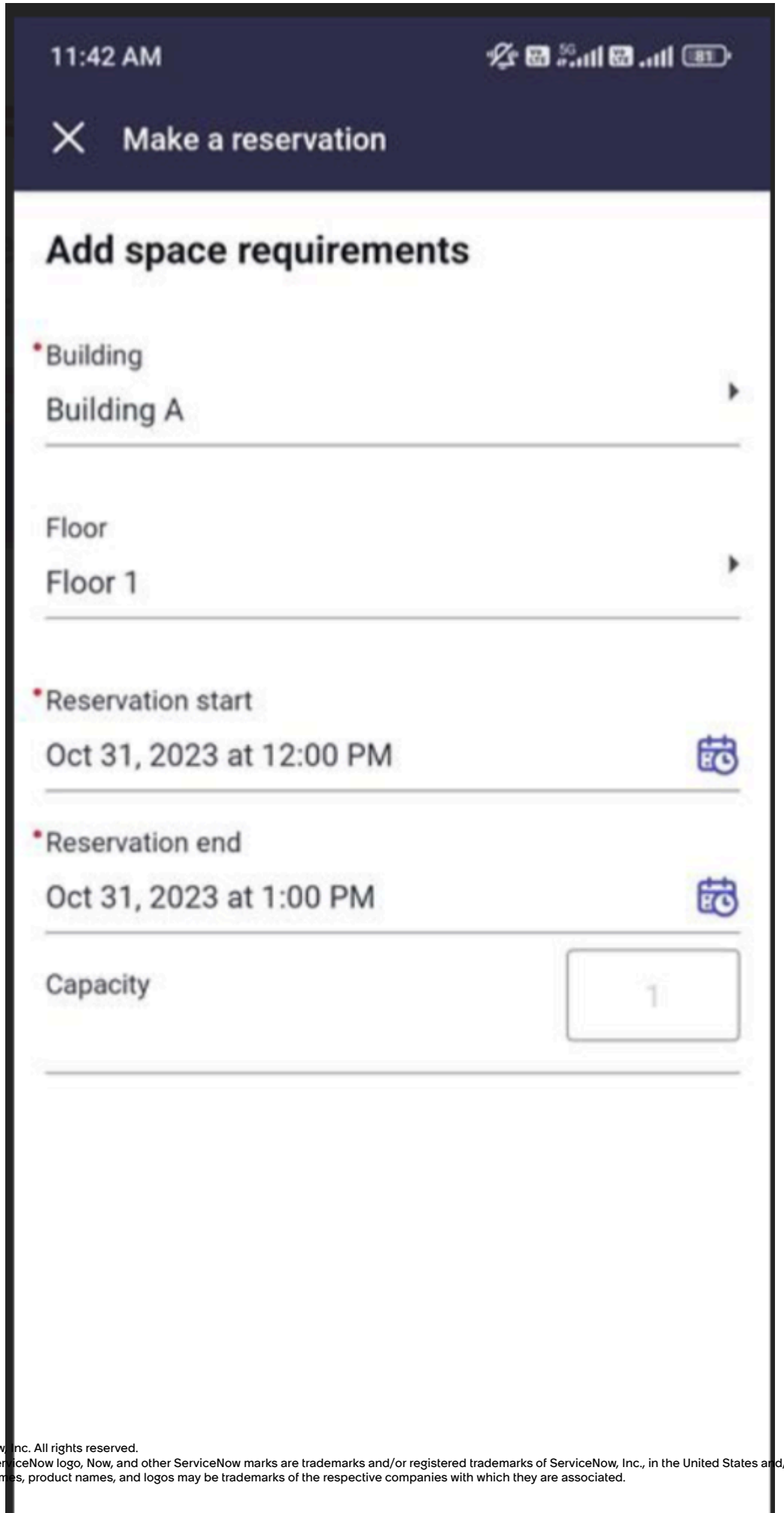

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Note: The **Toggle Map view** is not shown in this case. When a user proceeds with this option, map visualization (Map view) is used. If there is no map available for a building or a floor, users are not able to select a space (as users can only select a space using a floor map).

For more information, see Enable map view to create reservations and Make a reservation using the Now Mobile app.

Configure AI search for Workplace Service Delivery for Mobile

Install and configure AI search with Workplace Service Delivery for Mobile. Users can use AI search to search for campus, buildings, floors, or spaces.

Before you begin

Role required: admin

Note: To enable AI search for Workplace Service Delivery for Mobile, you need to request for AI search and activate AI search. For more information about how to install and configure AI Search, see AI Search.

Procedure

1. Navigate to **AI Search** > **AI Search Status**.
   A message is displayed that AI search application is not available and enabled on your instance.
2. Click the **Request AI Search** button to trigger automatic activation of AI Search on your instance.
   Your request is processed and it may take some time for the AI Search application to be activated.
3. After installing and configuring AI search, ensure that you have installed Workplace Core and Workplace Service Delivery for Mobile.
4. Navigate to **All** > **Search Configurations** > **NowMobile App Search Configurations**.
5. Change the Search engine to AI Search.
6. Click **Save**.
7. Navigate to **All** > **AI Search Index** > **Indexed Sources** > **Workplace Location Table**.
8. Select the **Index All Tables** button on the top right pane to open the Indexed Source History page.
   Indexed Source is queued for indexing. You can monitor the progress by refreshing this page. Once the Ingestion State is **Indexed**, the process is complete.

Result

When the **Ingestion State** is **Indexed**, the AI search configuration is complete and you can login to the Workplace Service Delivery for Mobile app to search for campuses, buildings, and spaces using AI search.

Configure map properties for Location directory

Configure map properties to enable reservation states, occupancy states, display permanent seat assignments, or auto-refresh time interval for showing the latest reservation and occupancy information on the map. Show or hide neighborhoods on the Location directory.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Space mapping** > **Map properties**.
2. Configure the following map properties for Location directory:

Map properties for Location directory

Map property	Value
Show Reservation and/or Occupancy information on Location directory [sn_wsd_space_map.show_rsv_occ_data_loc_dir]	Option to show the reservation and occupancy states on the Location directory. Set the map property to **Yes** to display reservation and occupancy status on the location directory.
Auto Refresh time interval (in mins) for showing Reservation and/or Occupancy information on the Location directory.	Option to auto-refresh reservation and occupancy information on the Location directory. Enter the map property value in minutes. Default value is 2 minutes. Based on this value, the map is updated and refreshed automatically every 2 minutes with the latest reservation and occupancy information for a selected location. You can change the default value as appropriate. Zero or negative integer value deactivates this property. Decimal values are not supported. **Note:** Make sure that you have enabled the map property Show Reservation and/or Occupancy information on Location directory. Auto-refresh time interval is displayed on the Location directory only when the Show Reservation and/or Occupancy information on Location Directory map property is enabled. If the Show Reservation and/or Occupancy information on Location Directory is set to **No**, the auto-refresh of reservation and occupancy information is not shown on the Location directory.
Configure the default state for the neighborhood indicator on the location directory [sn_wsd_space_map.display_neighborhood_on_the_map]	Map property to display the neighborhood on the Location directory. Select any of the following available list option as required: ○ Available: The **Neighborhood** toggle button is available on the Location Directory but is not selected. Select the check box to view neighborhoods for a selected floor. ○ Disabled: The **Neighborhood** toggle button is disabled and not available on the Location Directory. Employees cannot view neighborhoods for a selected floor.

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Map property	Value
	○ Default: By default, the **Neighborhood** toggle button is available and enabled on the Location directory. ○ User preference: By default, the **Neighborhood** toggle button on the Location directory is not enabled. If you select this option, your preference is stored in your next browser session. To disable neighborhoods on the Location directory, you can deselect the Neighborhood check box.
Enable persistence of filters on the location directory [sn_wsd_space_map.location_directory_filter_persistence]	Select **Yes** to enable persistence of space availability filters for browser sessions and tabs on the location directory. By default, this property is set to true. The filters are retained or persist across browser sessions and tabs. Applied filter information is retained from your last browser session.

3. Select **Save**.
   The updated map configuration properties are available on the Location directory.

Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile

Employees can plan their hybrid workplace schedule using the Workplace Service Delivery for Mobile. They can reserve a space for a day or make bulk reservations using Workplace.

Employees can indicate their preferred office location (office, remote, or visiting another office), get desk suggestions based on their location preferences, add workplace services available for a location, add preferred collaborators and match their in-office days with collaborators in-office days to increase productivity and collaborate effectively. While reserving or viewing a space, employees can see if the selected space is part of a neighborhood.

Note: The option to add your workplace preferences and suggestions are also available on the Employee Center portal. Employees are expected to use the Workplace Service Delivery for Mobile app to reserve a space and to view or modify their preferred workplace locations and workplace schedule suggestions. Reserve a workspace using your mobile app before coming to the office. Get desk suggestions based on your preferred location, past and future reservations, proximity (preferred collaborators), favorite spaces, neighborhoods, and standard services.

When proposing a space to an employee for reservation, the application considers the following employee preferences and Space Suggestions table configurations:

- Location preferences (campus, building, floor, and neighborhood)
- Favorite space or spaces set by an employee
- Past and future reservation data

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- Preferred collaborators
- Start time and end time (based on building time zone and Reservable module configuration for a location).

Application also considers the following configurations when fetching your preferred workplace locations:

- Filter and fetch locations from the Available Reservable Modules:
  - Fetch locations from all Reservable Modules that are marked for workplace experience in the Space types property [sn_wsd_concierge.suggestions_space_types]. For more information see Properties installed with Workplace Concierge
  - Verifies if it matches one of the allowed space types in the sn_wsd_concierge.suggestions_space_types property.
- Filter locations by Building: For each Reservable Module, application checks if employee's preferred location exists in the specified building. It retains Reservable Modules that are available in a building.
- Selects the Best Reservable Module:Looks at all matching Reservable modules and picks the best one based on the following:
  - If a module has no **Max days in future** Reservable Module property restriction, it is selected.
  - Then, it considers and selects the Reservable Module with the highest value in the **Max days in future** property configuration.

Administrators can configure the following to provide better workspace suggestions to employees:

- Space Suggestions table configuration based on Suggestion types (location, proximity, past and future reservation data, standard services, and collaborators). Each of these Suggestion type is a given a weight value (integer value). While proposing a space to an employee, application takes into account these weight values and accordingly ranks it in the search results based on the priority or weightage given to a Suggestion type. If any of the spaces doesn't fulfill the criteria, the employee is shown the next available preferred space. If a preferred workspace is not available for an employee they are also given the option to manually search for available spaces using the advanced reservation option.

  For more information, see Space suggestion Configuration
- Employee presence configuration in Workplace Concierge

  For more information, see Set Employee Presence.
- Properties enabled for Workplace suggestions and preferences.

  For more information, see Properties installed with Workplace Concierge.

For more information, see Configure a reservable module.

Manage your in-office presence preferences

Employees can customize and manage their in-office or workday presence preferences.

Before you begin

Employees can reserve a space and get space suggestions based on their preferred locations, neighborhoods, workplace services, and collaborators. Employees can modify or update their workplace preferences as and when required using the In-office preferences option in the mobile app.

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Make sure you have the following applications:

- Workplace Service Delivery for Mobile
- Workplace Core
- Workplace Reservation Management
- Workplace Concierge
- Indoor Mapping
- Workplace Central
- Workplace Space Management
- Workplace Space Mapping

Role required: sn_wsd_core.workplace_user

Procedure

1. Log in to Now Mobile®.
2. Access your Workplace Service Delivery for Mobile instance.
3. Tap and select the **In- office preferences** option from the home page.

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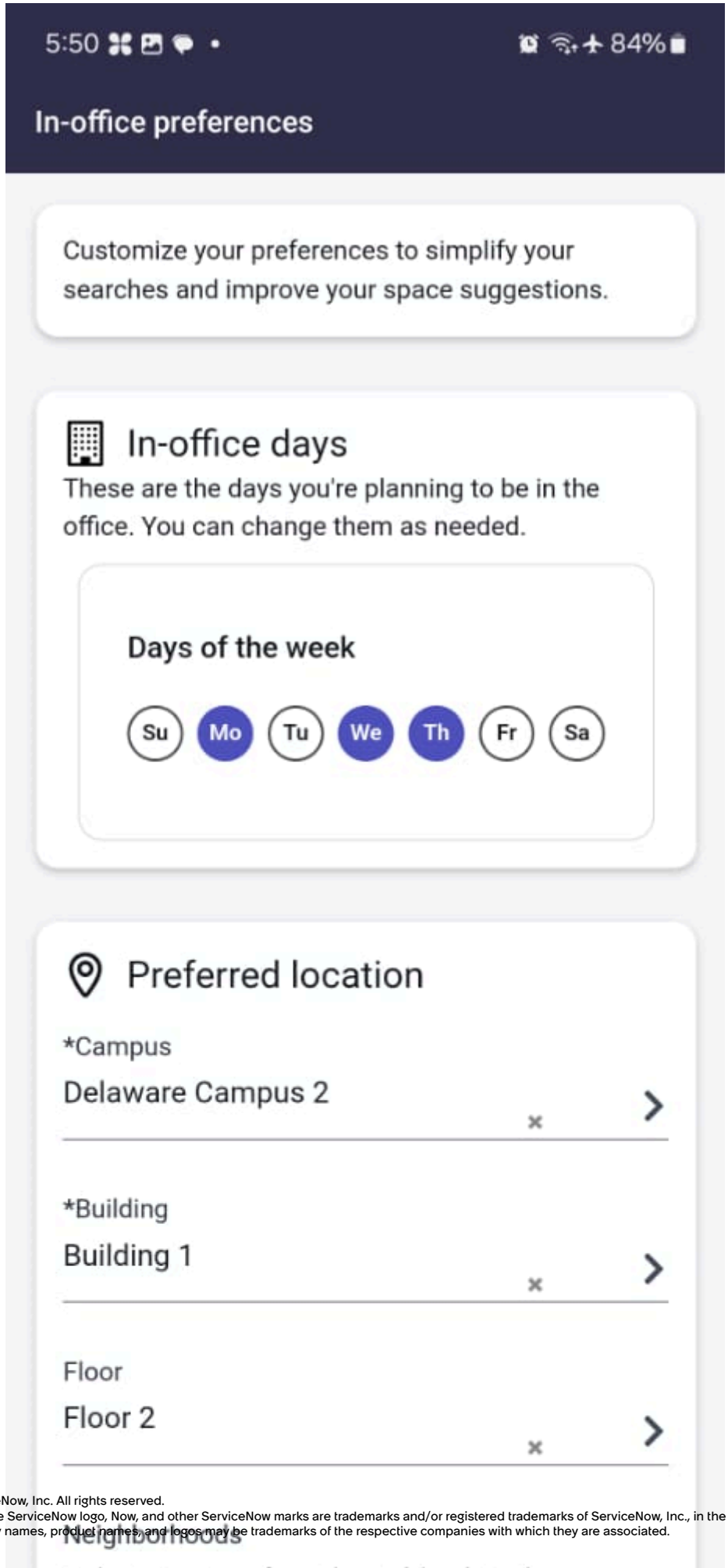

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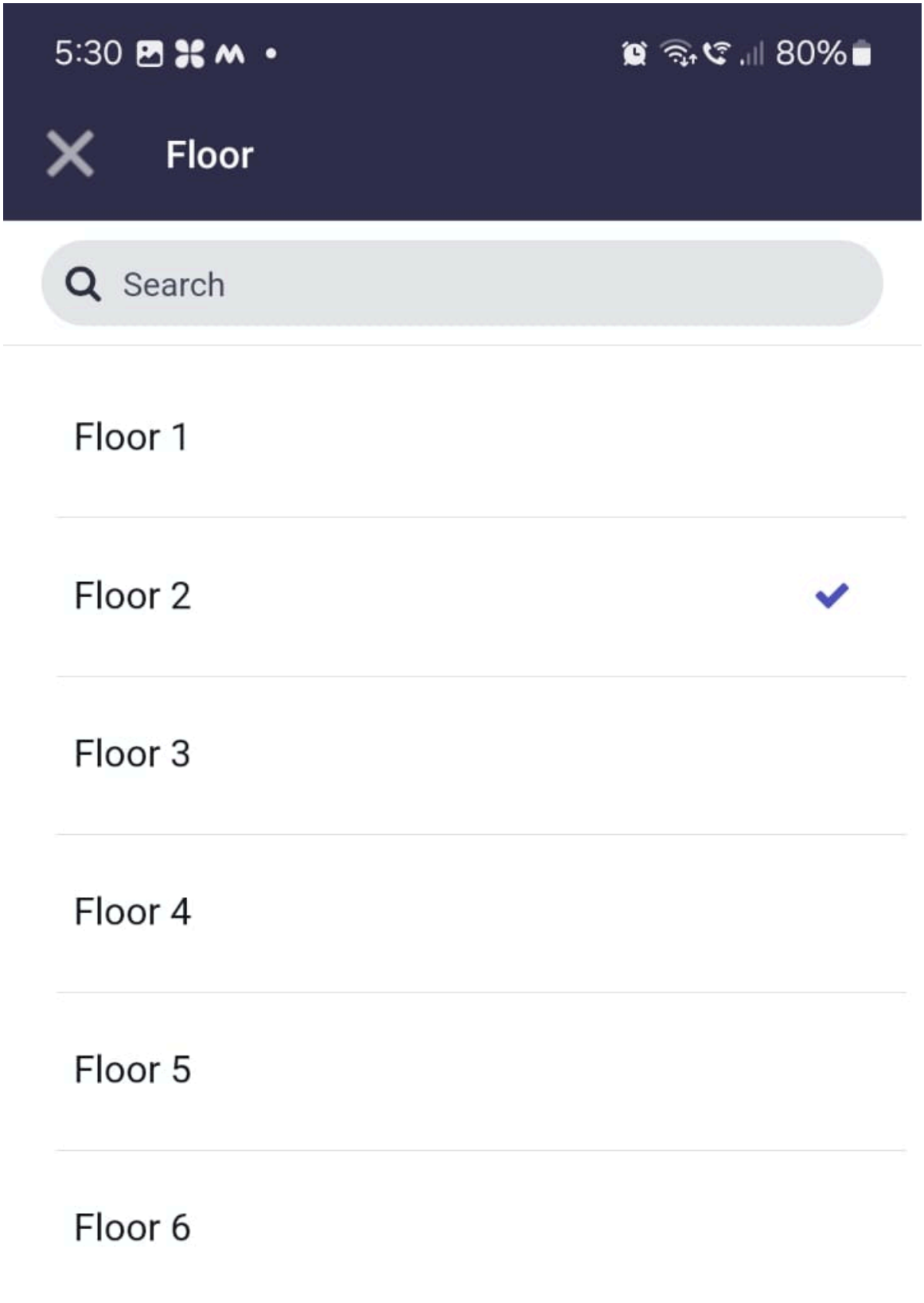
Search for floors. Campus and building have pre-filled values if you have workplace profile data.



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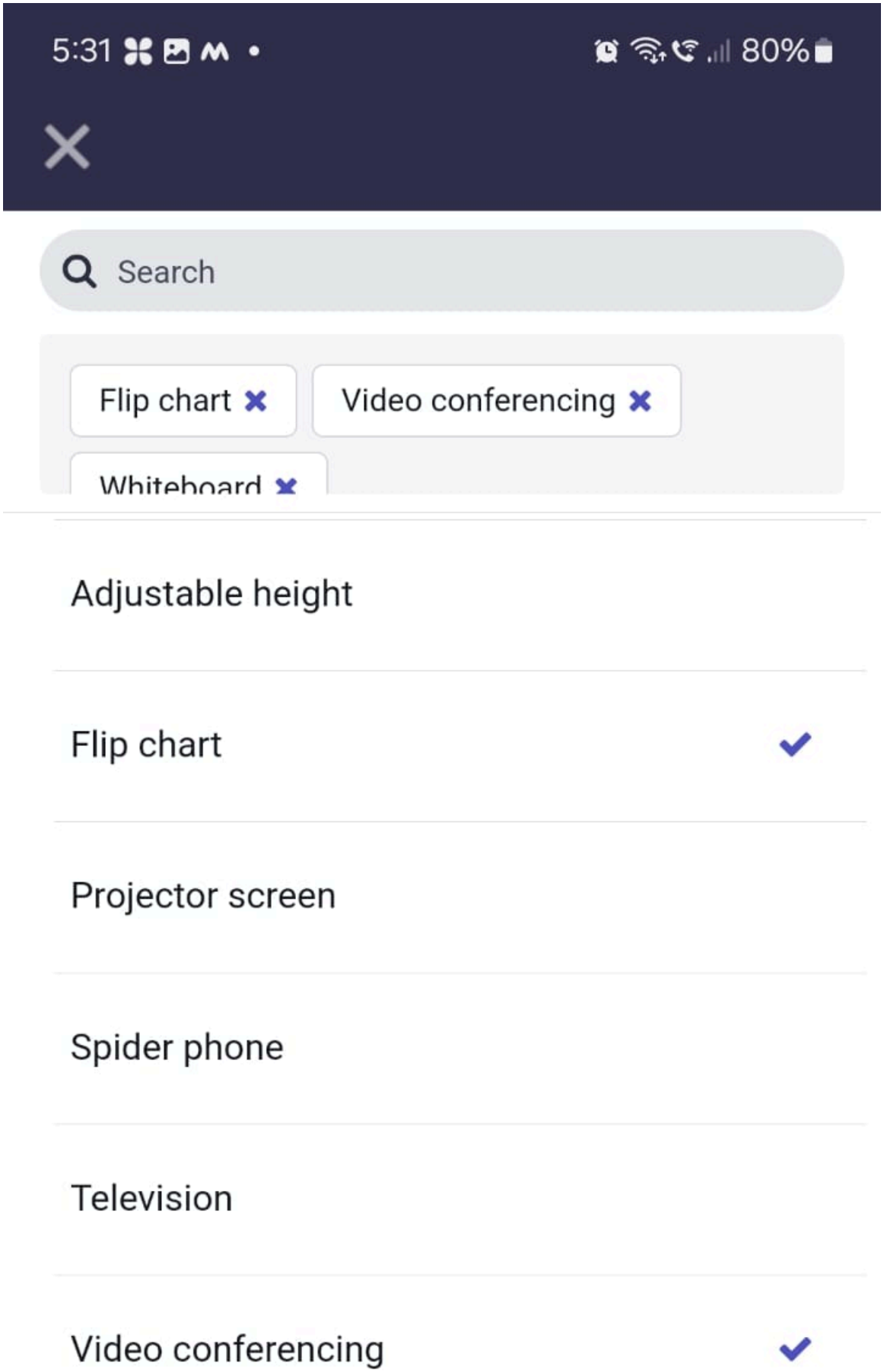
Search for preferred workplace services to be added to a reservation if these services are available in a



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Note: The option to manage your workplace preferences is also available on the Employee Center portal (**All** > **Employee Center** > **Workplace Services** > **Site safety** > **Workplace Preferences**). Employees are recommended to use the Workplace Service Delivery for Mobile to manage their hybrid work schedule and reserve a space before coming to office.

4. Fill in the form fields.

Preferred Location

Field	Description
Campus	Campus name. If an employee has a workplace profile, this field value is automatically set to employee's primary location. **Note:** If an employee doesn't have a workplace profile, the Campus, Building, Floor fields are empty. This is a mandatory field information and employees should search for and select their preferred campus from the available list. Application provides workspace suggestions based on your preferred campus locations. Employee's location preferences are used while searching for a space to create a reservation.
Building	Building name. If an employee has a workplace profile this field value is automatically set to the preferred building. This is a mandatory field and employees should search for and select their preferred building from the available list. Application provides workspace suggestions based on your preferred building location to create a reservation. **Note:** Building must be active and should be reservable.
Floor	Floor name. Employees can search for and add a preferred floor in a building. Application provides workspace suggestions based on your preferred floor selection.
Neighborhoods	Neighborhoods name. Employees can search for search for and add a preferred neighborhood or multiple neighborhoods. If an employee has assigned neighborhoods, the field value is automatically set to a

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Field	Description
	neighborhood or neighborhoods. Employees can search for and add a new neighborhood. Neighborhoods are sorted based on the assigned group for an employee. Application provides workspace suggestions based on your preferred neighborhoods. **Note:** Neighborhood is only available when Workplace Space Management is installed.
Sit near	Preferred Collaborators name. Option to add preferred collaborators to collaborate while you are in office. Selected collaborators will be used when suggesting spaces Application provides workspace suggestions based on your preferred collaborators. You can add multiple collaborators that you want to collaborate with while you are visiting your office. If the collaborators are available on your in-office days, application provides space suggestions accordingly. Application fetches preferred collaborators data from the Employee presence in Workplace Concierge. You have the option of removing collaborators and adding new ones as required for a selected location and as per your in-office presence day schedule.To add more than 10 preferred collaborators, you can use the Employee Presence dashboard in Workplace Concierge to add them. For more information, see Add a collaborator.
Services	Available workplace services for a reservation and a selected location. Option to add preferred workplace services to a reservation. The employee can search for and select multiple standard services as required. The employee can remove or add available standard services as required. They can search for a new service and add a service if it is available for a selected location. For example, wheel chair, video conferencing, whiteboard, water bottles, projector, furniture, and so on.

5. Select **Apply**.
   You can now manage your workplace schedule and reserve a space using the desk suggestions and presence data. For more information, see Create a reservation for a day in Workplace.

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Create a reservation for a day in Workplace

Reserve your preferred workspace in Workplace using the Workplace Service Delivery for Mobile app.

Before you begin

View your workday presence schedule, office as well as remote days in the schedule calendar.

Employees can plan their hybrid workplace schedule and modify workplace presence preferences (in-office, Remote, and visiting another office) in Workplace Service Delivery for Mobile. Employees can view their preferred in-office days and get insights on their preferred collaborators. They can reserve a space by selecting their preferred workspace and collaborators.

Get insights on workplace collaborators who plan to be in office on the days when you are in office. Change your workplace preferences and workplace presence information as and when required to maximize workplace productivity and collaboration. If no collaborators are available in your in-office days, update your in-office presence days to match it along with that of your preferred collaborators.

Make sure that you have the following applications:

- Workplace Service Delivery for Mobile
- Workplace Core
- Workplace Reservation Management
- Workplace Concierge
- Indoor Mapping
- Workplace Central
- Workplace Space Management
- Workplace Space Mapping

Role required: sn_wsd_core.workplace_user

Procedure

1. Log in to the Now Mobile® app.
2. Access your Workplace Service Delivery for Mobile instance.
3. Tap and select the **Workplace** location pin icon () from the mobile home page.

   The location pin changes to a blue pin icon (). The workplace screen appears for you to coordinate your workdays and collaborate with your preferred collaborators.
4. Tap and select a date labeled as **In-office** day on the calendar to make a reservation.

   The Schedule calendar view shows the current date as selected by default. The text label **Today** is displayed for the current date of a month. When you select a future date,the label for **Today** is inactive. This label is not available for making bulk reservations.
5. On the **Schedule** calendar view, make the following changes as required:
   If you have an existing reservation for a selected date, the date is shown with a dot on the calendar. By default, the current week, day, and month is selected on the calendar.

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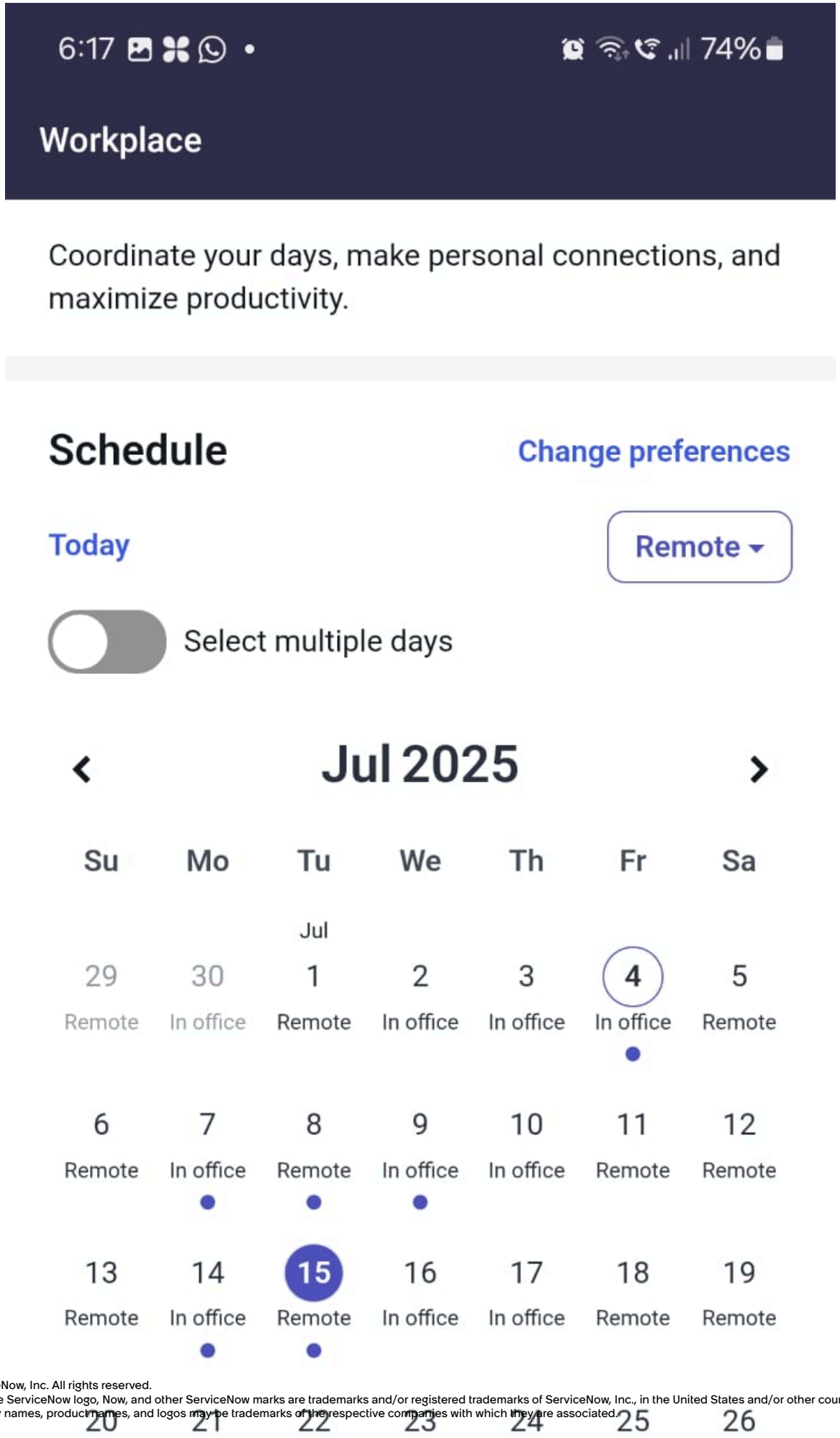

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a. View your in-office, remote workday schedule for a week on the calendar.

The calendar view shows your hybrid workday schedule (In-office, Remote). Use the chevron buttons on the calendar to toggle between different calendar views (Day, Week, and Month). Adjust your calendar view as required.

- Use the chevron next button () to view the next or future week when you are in a week view on the calendar. To view the next month in a calendar, expand the calendar and tap the next button. By default, the calendar view is collapsed to show only a week view.
- Use the chevron previous button () to go back to the previous week or weeks.
- Use the chevron expand button () to expand the calendar view for a month if it is in a collapsed state (shows only a week view for a selected month when collapsed).

b. Change your workplace presence information from **In-office**, **Remote**, or **Visiting another office**.
The application fetches presence information from the Employee presence configuration. For information, see Set Employee Presence. This option is not available for creating bulk reservations.

Note: If you try to select a date which is labeled as **Remote**, the Remote day is changed to an **In-office** presence day and this record is updated in the Employee Presence Exceptions table (**All** > **Workplace Concierge** > **Employee Presence** > **Exceptions**). The **Location** column in this table is updated with the building name that you using to reserve a space for your **In-office** day. For more information, see Components installed with Workplace Concierge.

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- **In-office**: Option to indicate your in-office presence or days when you are working from office. For example, if you change your In-office presence day to Remote, the changed location message is displayed.

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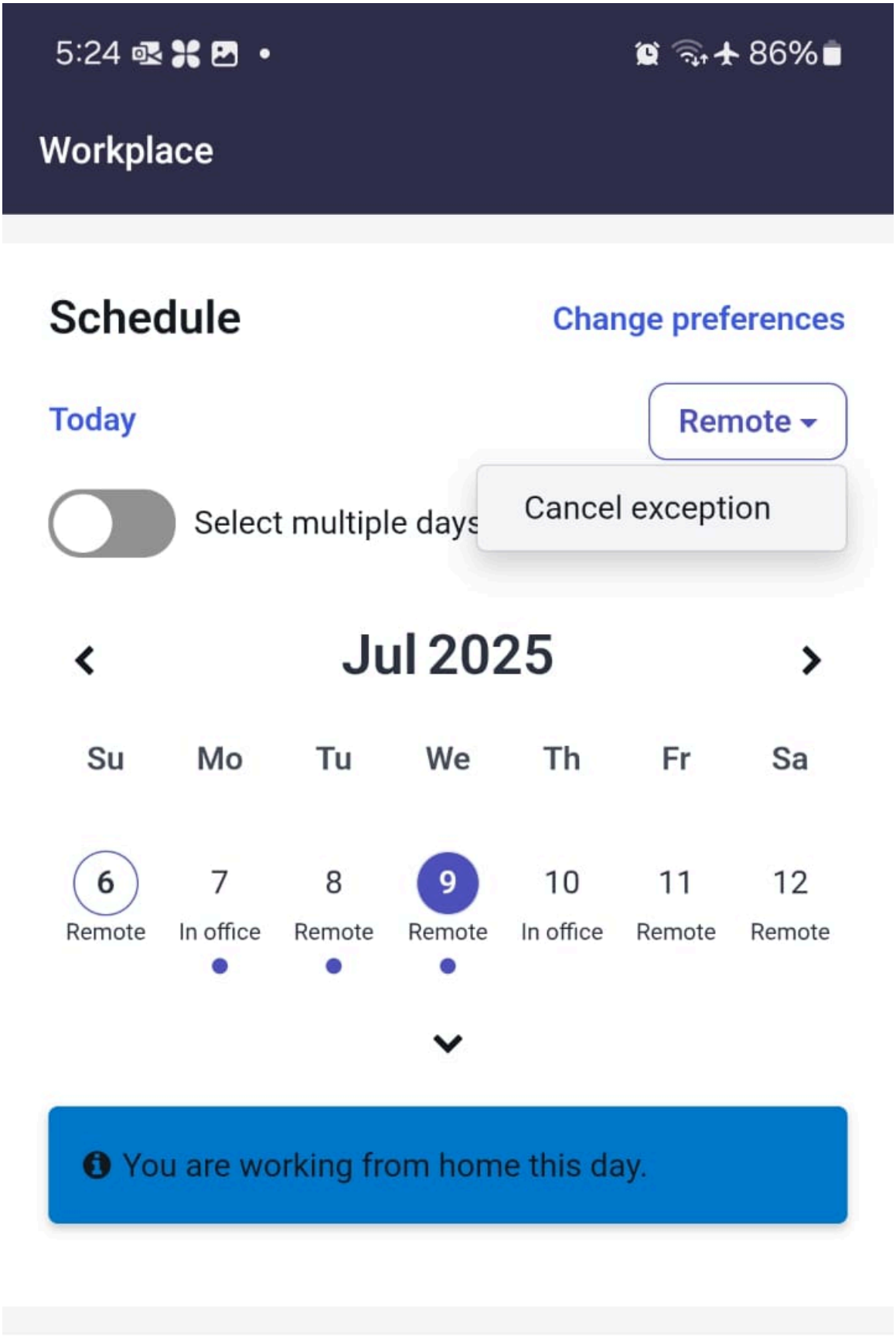

Space suggestions

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Select **Cancel exception** to revert back the changes that you made to your workday presence schedule. Revert back to **In-office** from **Remote**. A message is displayed "Exception canceled".

- **Remote**: Option to indicate that you are working remotely or from home. When you select a remote day on the calendar, application shows the message "You are working from home this day".

  For example, if you change your preference from Remote to In office, application shows the message 'Location changed."

- **Visiting another office**: Option to indicate that you are in office but visiting another office.

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When you try to change a remote or in-office day to Visiting another office, the change location dialog box opens. You can search and select a new location. Select **Change Location** to update a new location.

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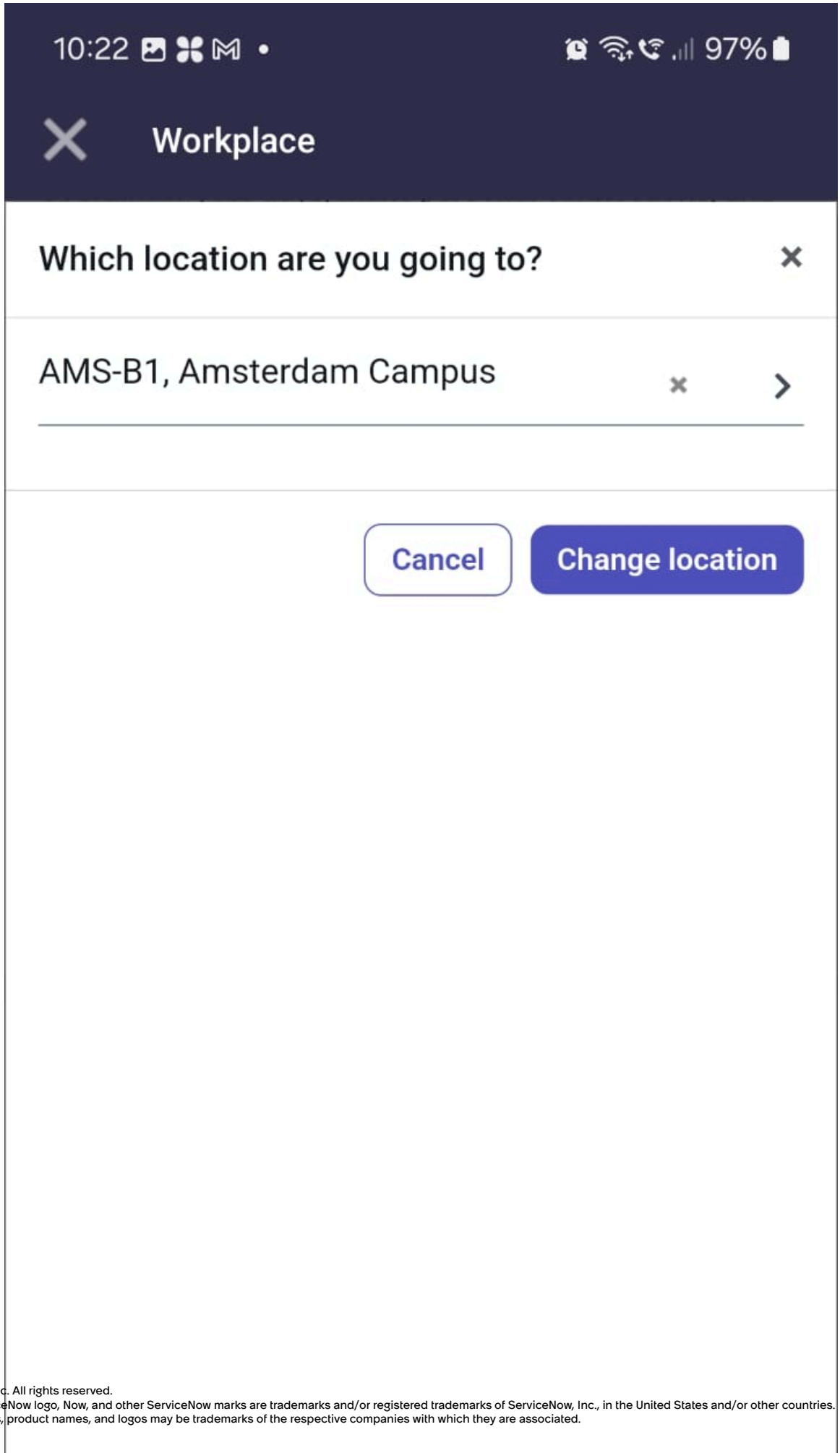

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6. Tap and select **Change preferences** to change your workplace preferences.

   The In-office preferences page opens for you to update your in-office days. Change or modify your location, collaborators, and workplace services as required. For more information, see Manage your in-office presence preferences.

7. In **Space suggestions**, review the suggested building, floor, and a space.
   By default, the **Space suggestions** card displays your preferred desk or space. If you want to reserve a different location or space than what is suggested to you, application fetches other locations from the search results shown on the reservation portal.

   If the user has reservations on a selected day, following information is shown in the suggested workspace card;

   - Reservation time based on building time zone and location.
   - Reservation status (Confirmed, Completed, Awaiting confirmation, and so on.)
   - Space Name
   - Campus, Building, and Floor name.
   - Time. The reservation time depends on the reservation system property for start time (sn_wsd_rsv.day_start) and end time (sn_wsd_rsv.day_end). The reservation time depends on the building time zone.
   - Reservable module name: Desks.
   - Capacity: Meeting room capacity.
   - Standard services and Location purposes
   - Workspace Image (if the workspace has an image associated with it)

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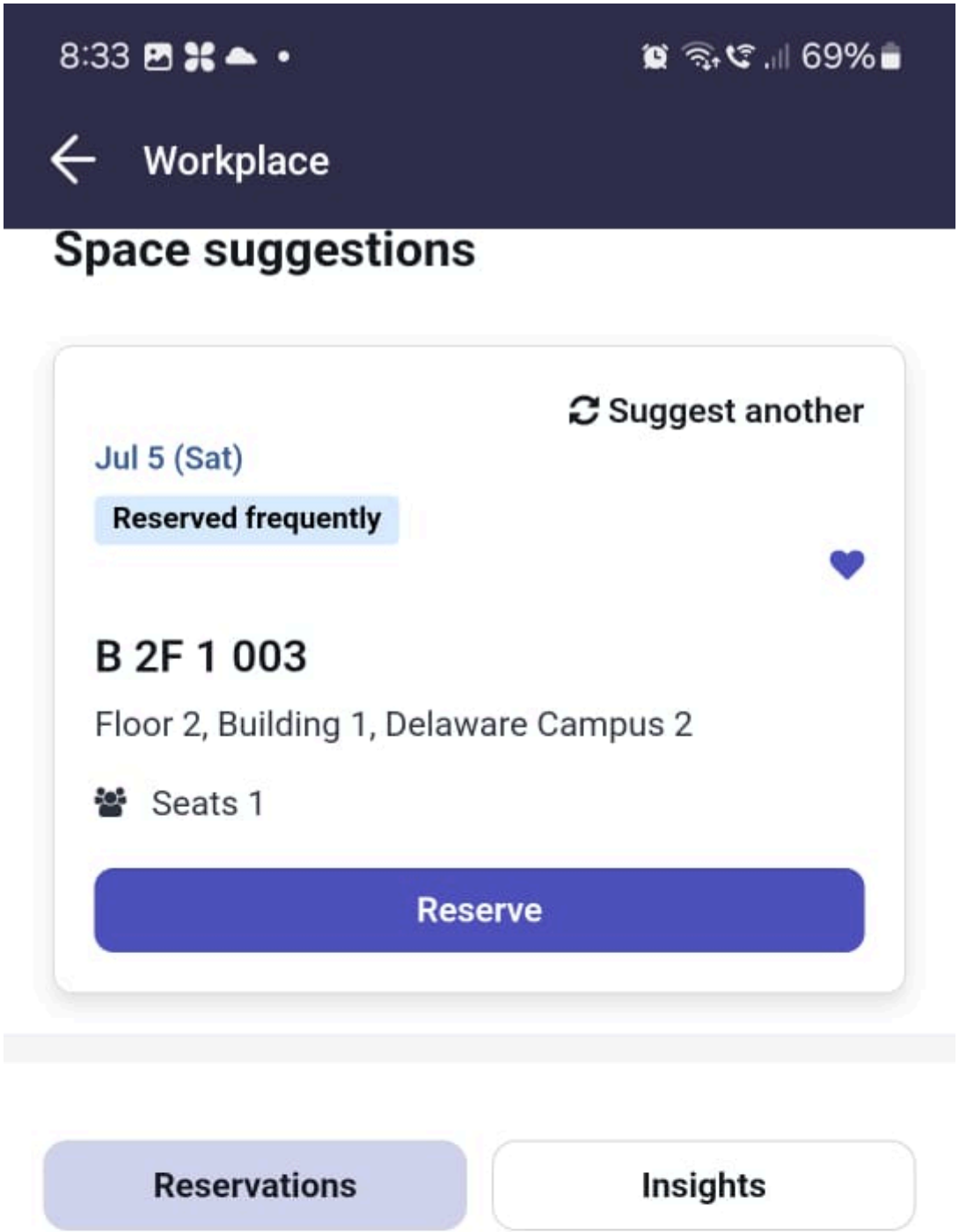

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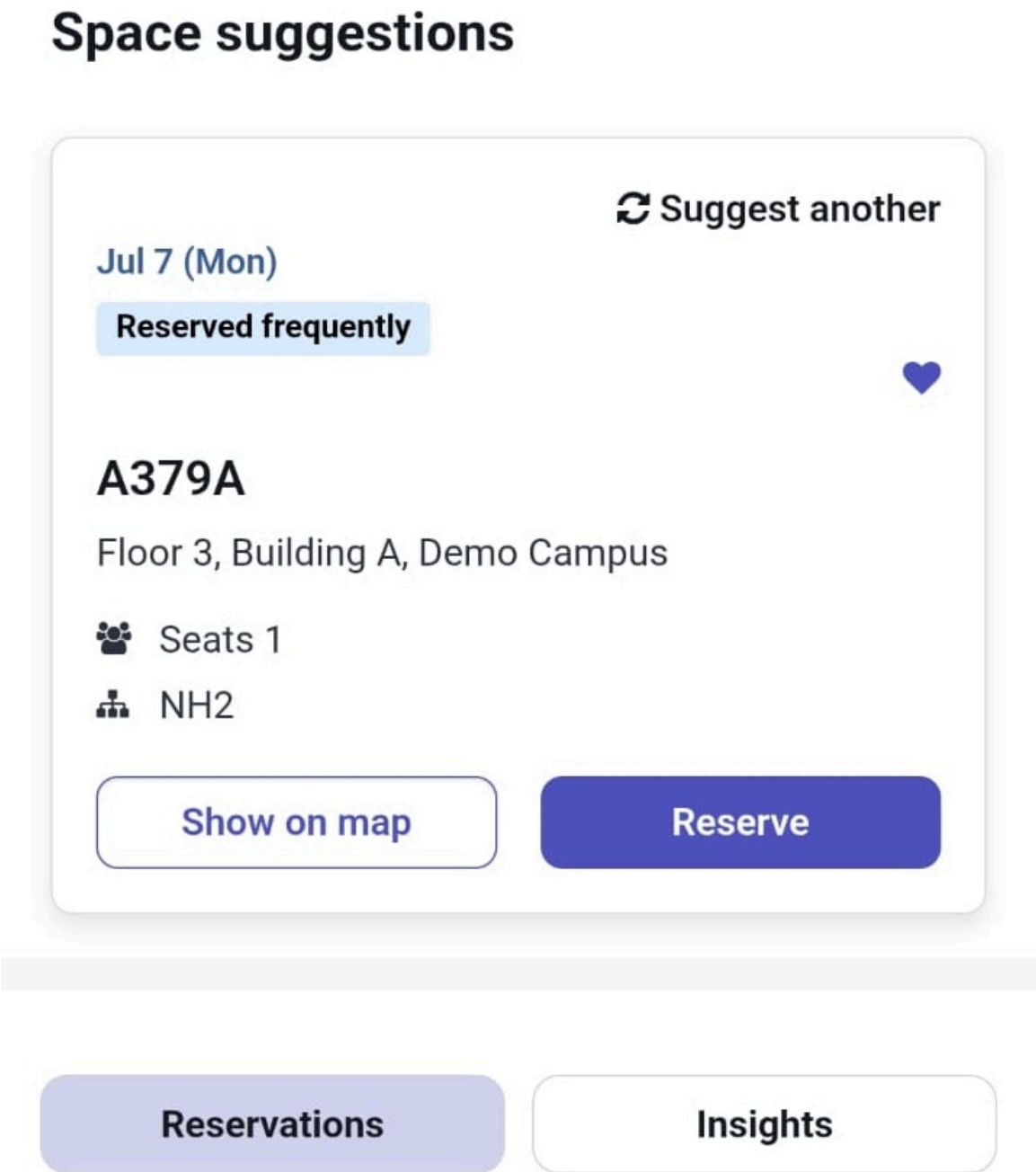

Application provides workspace suggestions based on your past and future reservation data, frequently used desk or spaces, preferred locations, favorite spaces, preferred workplace services, and preferred collaborators. The Suggestion tags you have added to the Space Suggestion configuration table is displayed on the Desk suggestions card. For example, **Reserved frequently**, **Your favorite**, and so on. When an employee is visiting another office, the suggestions are provided from the office that an employee is visiting and is not based on the users in-office preferences. For more information, see Space suggestion Configuration and Properties installed with Workplace Concierge

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8. To update or change a suggested workspace from Space Suggestions, select the **Suggest another** refresh button icon ().

Application shows the available spaces in a building. At a time, the application shows 10 maximum suggestions when an employee taps and selects the refresh button repeatedly. After the tenth attempt, the application shows a message, " Still looking for a space that fits your requirements? Click here to review suggestions again." Selecting **Click here to review suggestions again** displays a list of workspace suggestions.

Note: If there are no available spaces based on employee preferences, the **Suggest another** option can also show a single space or few spaces (and not 10 preferred available spaces always) when an employee selects the refresh button.

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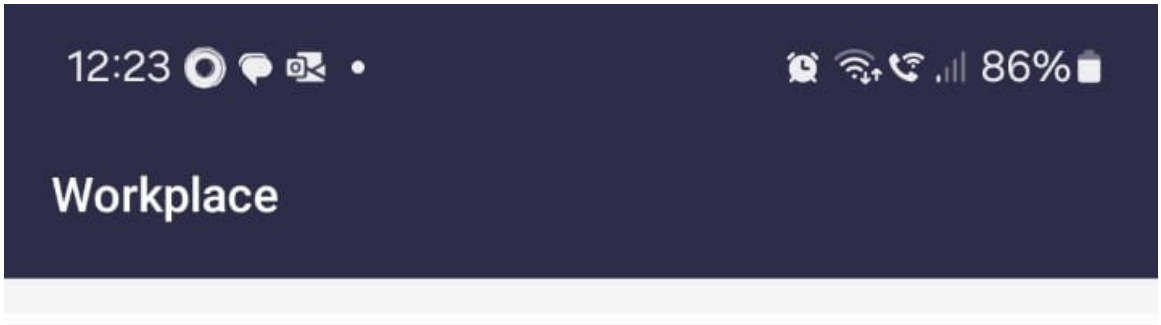

Space suggestions

Still looking for a space that fits your requirements? Click here to review suggestions again.

Search all spaces

Suggest another

Jul 16 (Wed)

Reserved frequently

B 2F 2 009

Floor 2, Building 1, Delaware Campus 2

Seats 1

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To review previous suggestions, tap and select "Click here to review suggestions again".

Select **Search all spaces** if you are don't find the workspace that you are looking for. Selecting **Search all spaces** opens the Make a reservation screen on the mobile app. For more information, see Make a reservation using the Now Mobile app.

9. Select **Reserve** to reserve a space for a selected date and time on the Make a reservation page.

   Note: If the sn_wsd_concierge.allow_overlapping_reservations property is set to *false* by your administrator, you are not allowed to create an overlapping or parallel reservations for a day. You can make only a single reservation for a day.

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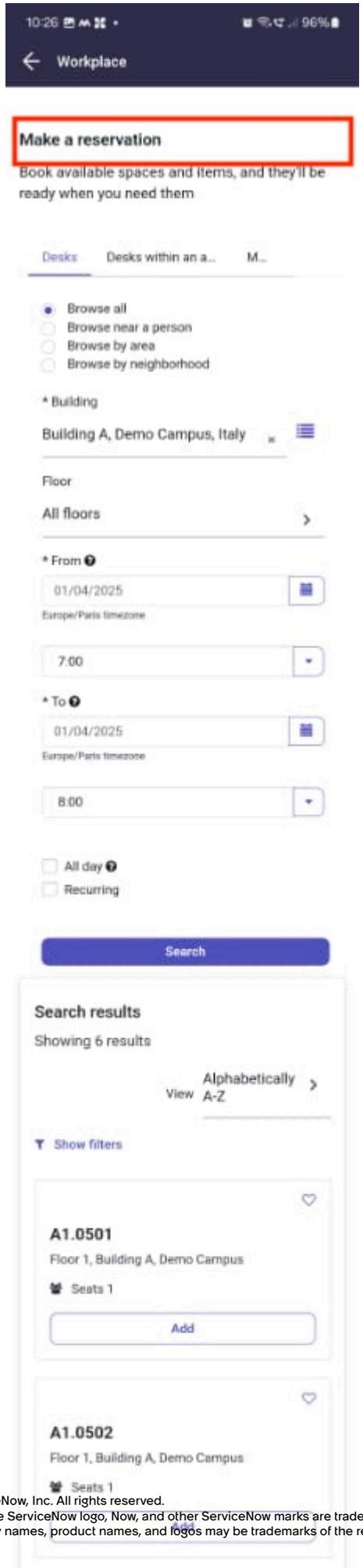

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If the user has no reservations for a selected day, a message appears 'You have no reservations for the this day".

When there's no reservations for a selected workday, the application shows "You have no desk reservations for today." If you don't make a reservation, application shows "You have not made a reservation for this week's in-office day for (<date and month name>)". If you select a remote day, application shows "You are working from home this day."

Reservation timings are based on the **All day**Reservable module configuration set by your administrator. If **All day** is enabled and **All day meaning** is set to **Full day**, you can make a reservation for full day (one day or entire day based on your building timezone). For Example, reservation timings is shown from 9.00 am to 5.00 pm based on your office work day start time and end time reservation properties. settings. For more information, see Properties installed with Workplace Reservation Management.

10. Tap the **Reservations** tab to view your reservations in an Agenda view.

    The Agenda view shows all your existing reservations. It shows reservations that you have made using the Advanced Reservation portal and reservations created using the mobile app. It also shows the labels for different type of reservations you have made like Group, All day, recurring (multi-day), multi-building, neighborhood, and so on.

11. Tap a reservation on the Agenda view and select the more information icon (⋮) to open the Actions menu.

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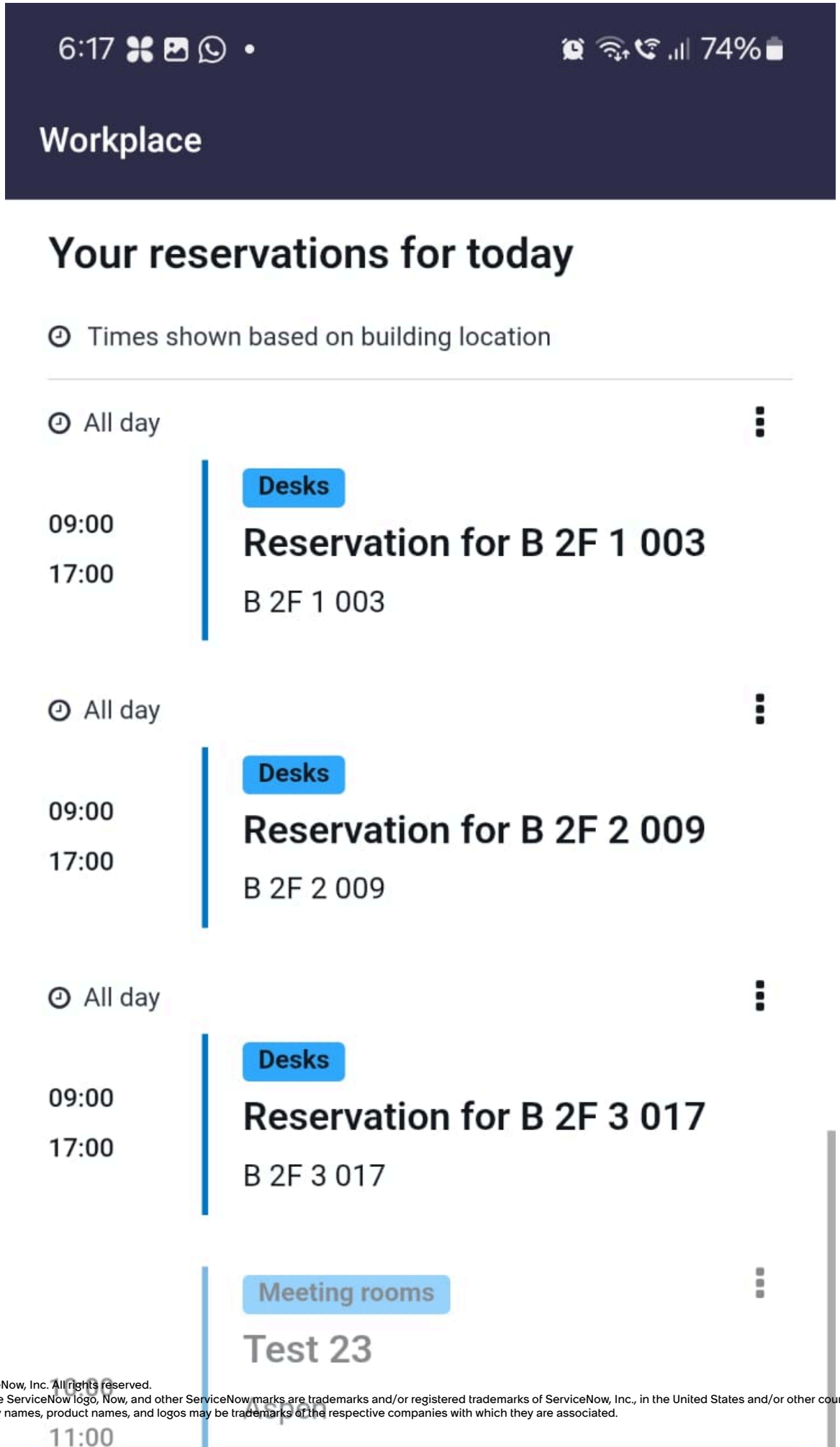

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It also shows the labels for different type of reservations you have made like **Group**, **All day**, **recurring (multi-day)**, **multi-building**, **neighborhood**, and so on. **All day** reservations are shown on the top and then other types of reservations are shown in the Agenda view.

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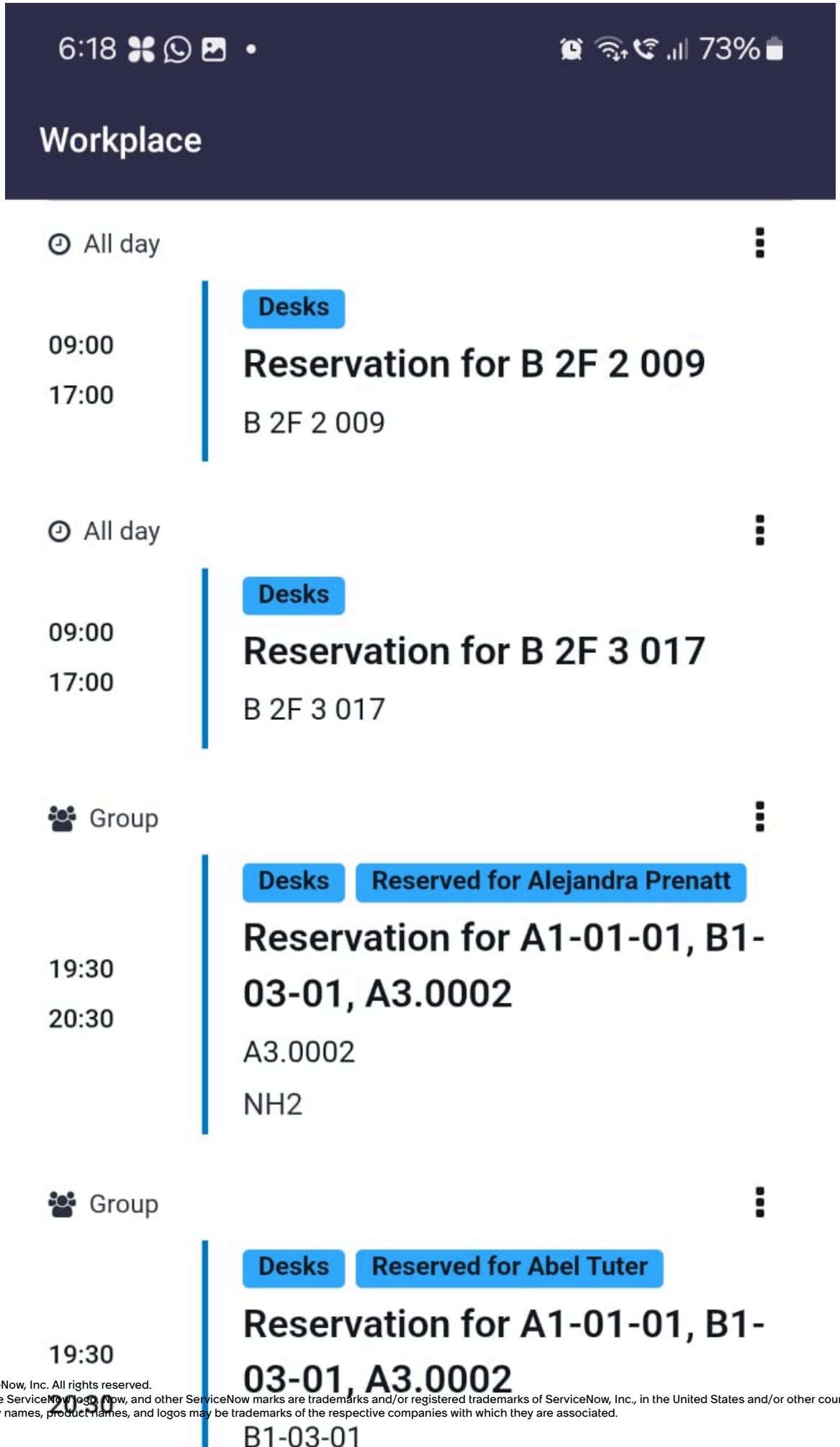

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12. Select the Actions menu items to complete the following:

a. Select the Actions menu icon (⋮) adjacent to a reservation in the Agenda view to open the Actions menu.

b. The Actions menu shows the following options:

- Check in or Check out
- Cancel Reservation
- Edit Reservation
- View reservation information
- Show on map

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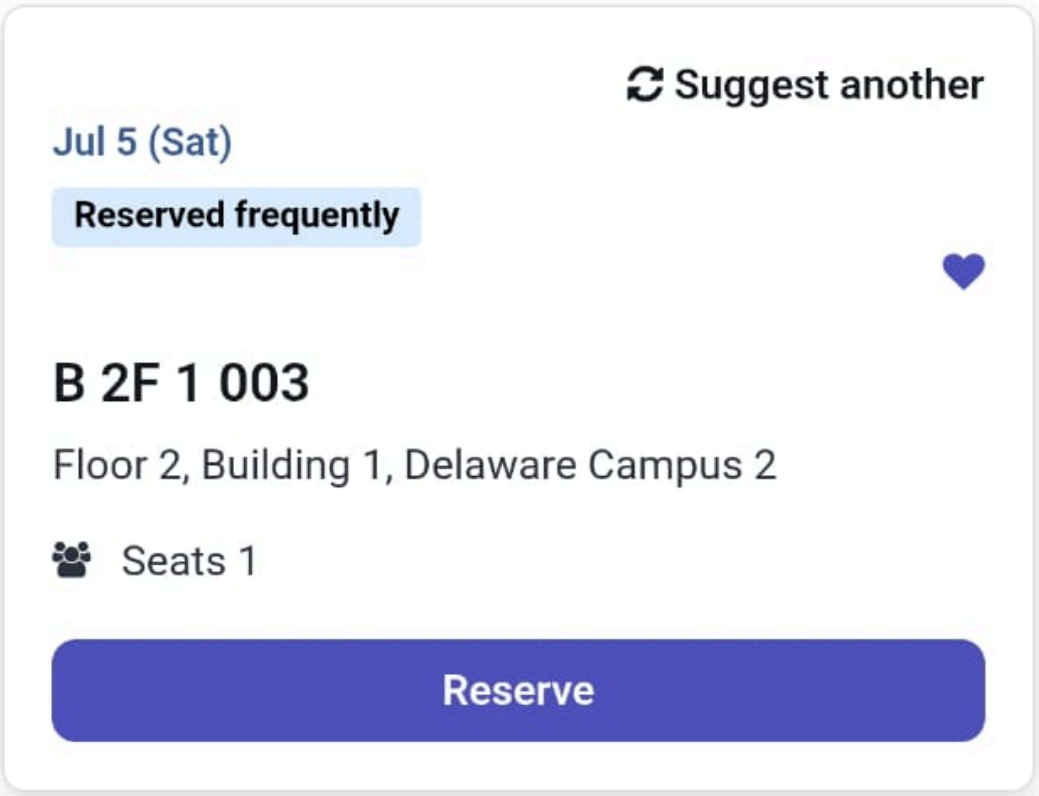

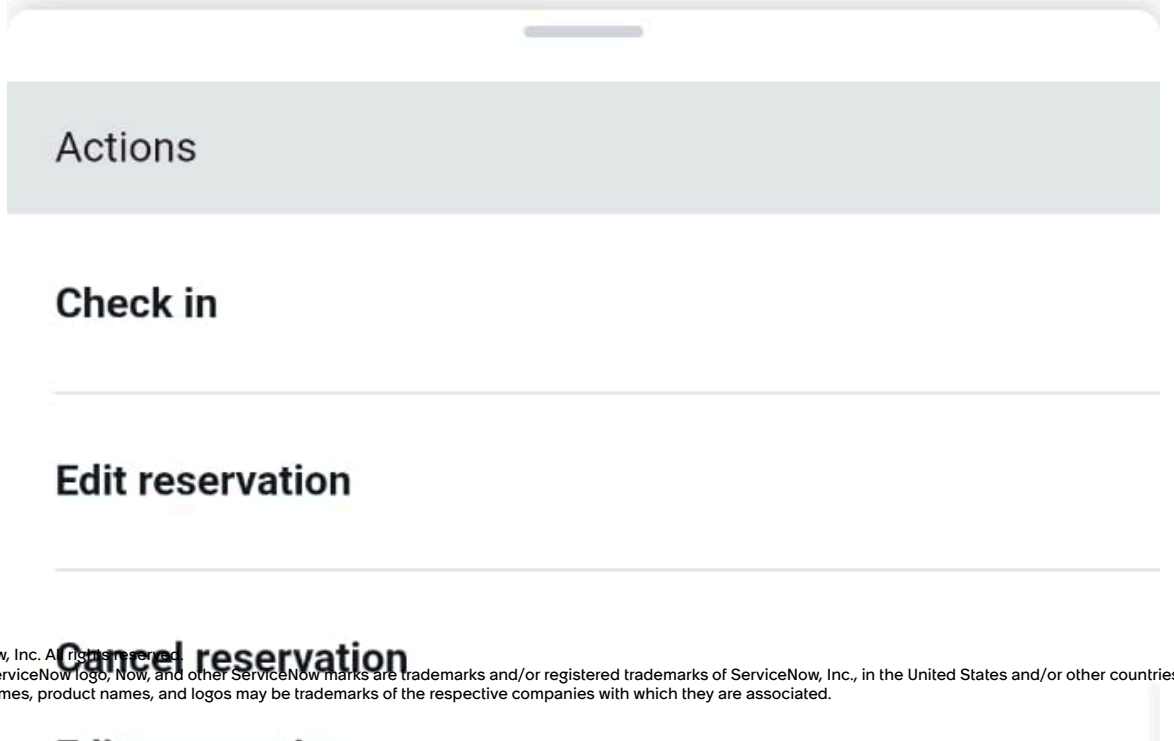

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c. Check-in or Check-out: Select **Check-in** to check in a reservation.
After a reservation is checked in, you see the **Check out** option to check out your reservation.

d. Select **Edit Reservation** to edit location, date and time for your reservations.

Update your reservations to remove or edit workplace services using the Update reservation details page. For more information, see Review and edit your reservations in Workplace.

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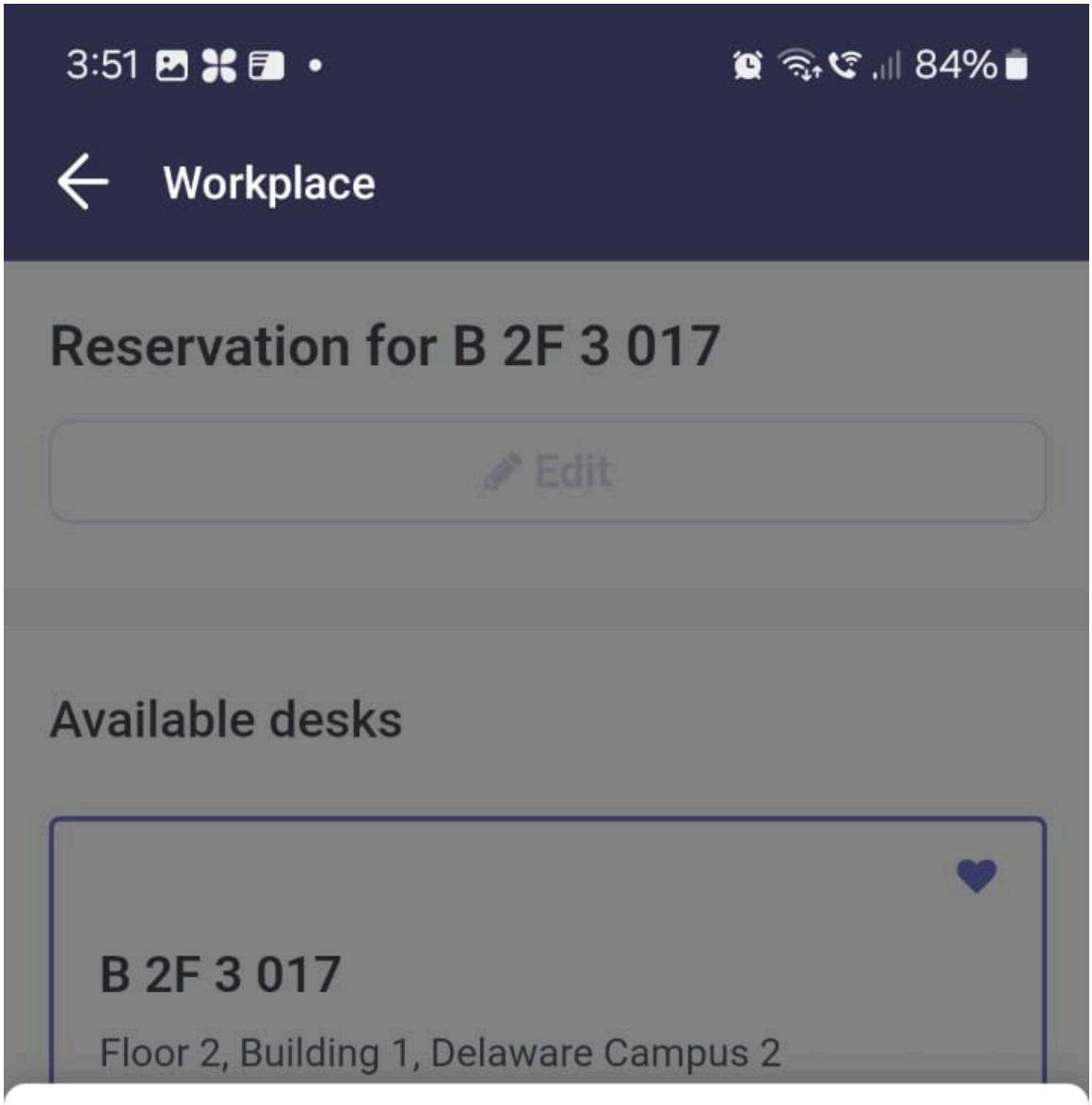

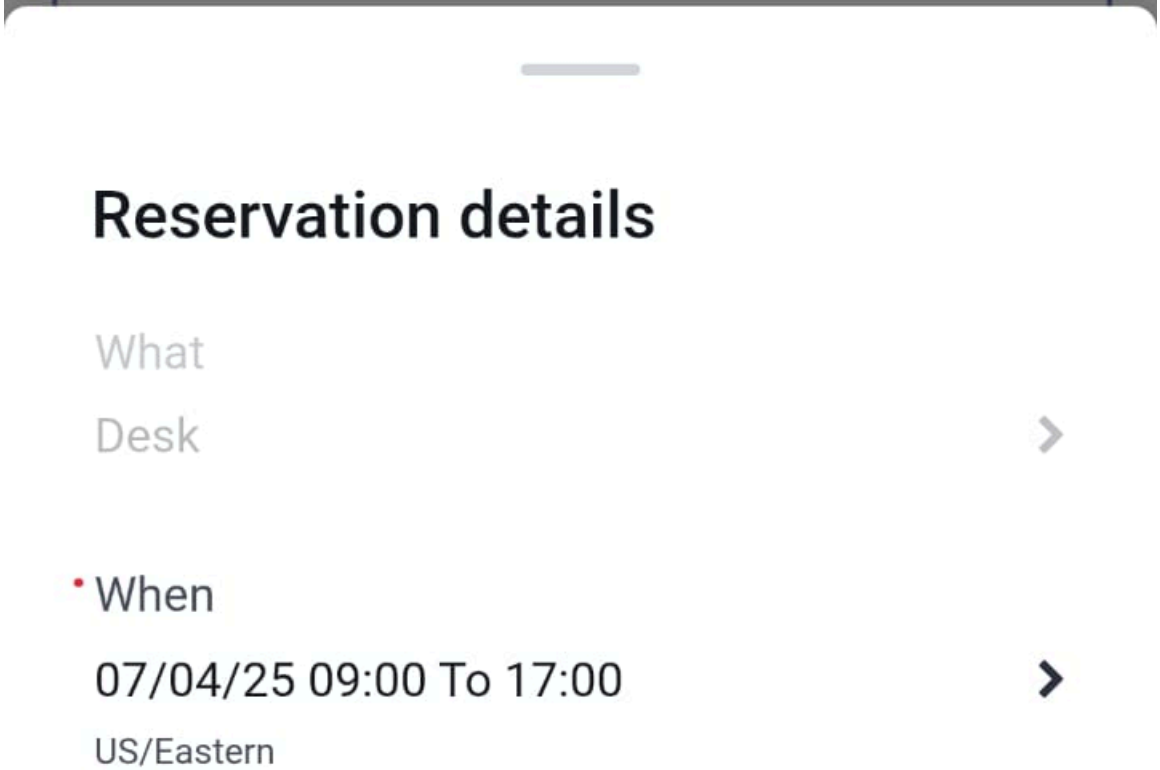

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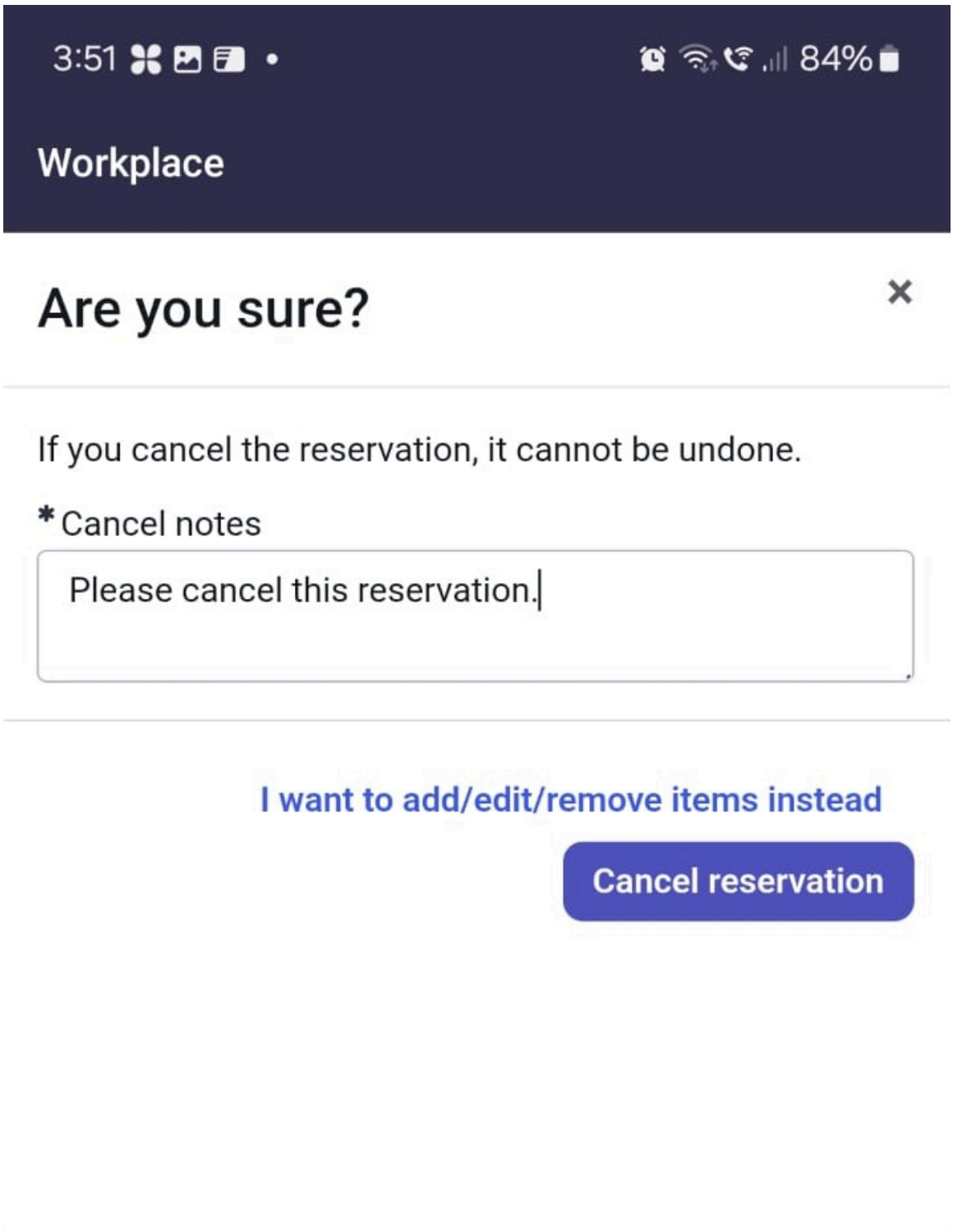
e. Select **Cancel Reservation** to cancel a reservation.

Employees can directly cancel a reservation if the reservation doesn't require cancel notes. The option to add a cancel note is set by your administrator in the Reservable Module Widget Configuration. For more information, see Configure a reservable module.



Select **I want to add/edit/remove items instead** to update workplace items in a reservation.

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f. Select **View reservation Information** to view Reservation summary for a reserved space.

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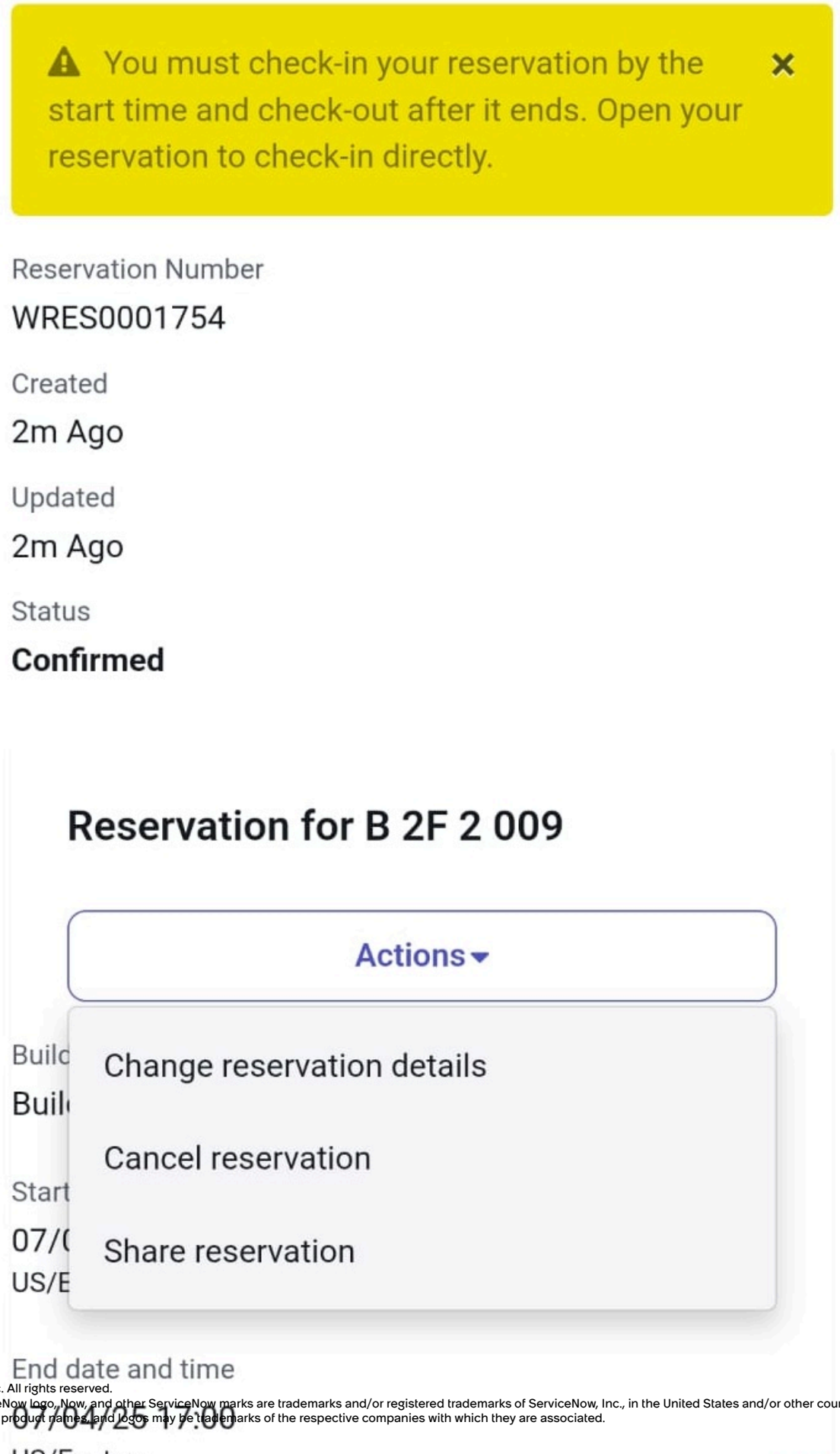

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13. Tap and select the **Insights** tab to view your collaborators and get insight on their in-office days.

    Match your In-office days with that of your collaborators to maximize productivity and collaboration. The application fetches your preferred collaborators information from the Employee presence configuration. For information, see Set Employee Presence.

    Application shows the following information for your preferred collaborators:

    - The number of collaborators who plan to be in office while you are visiting office
    - View details of collaborators who are visiting another office in your in-office day.
    - Collaborators who are working remotely on your in-office day

    If there are no collaborators for a selected in office day, application shows "None of your collaborators plan to be in office on this day."

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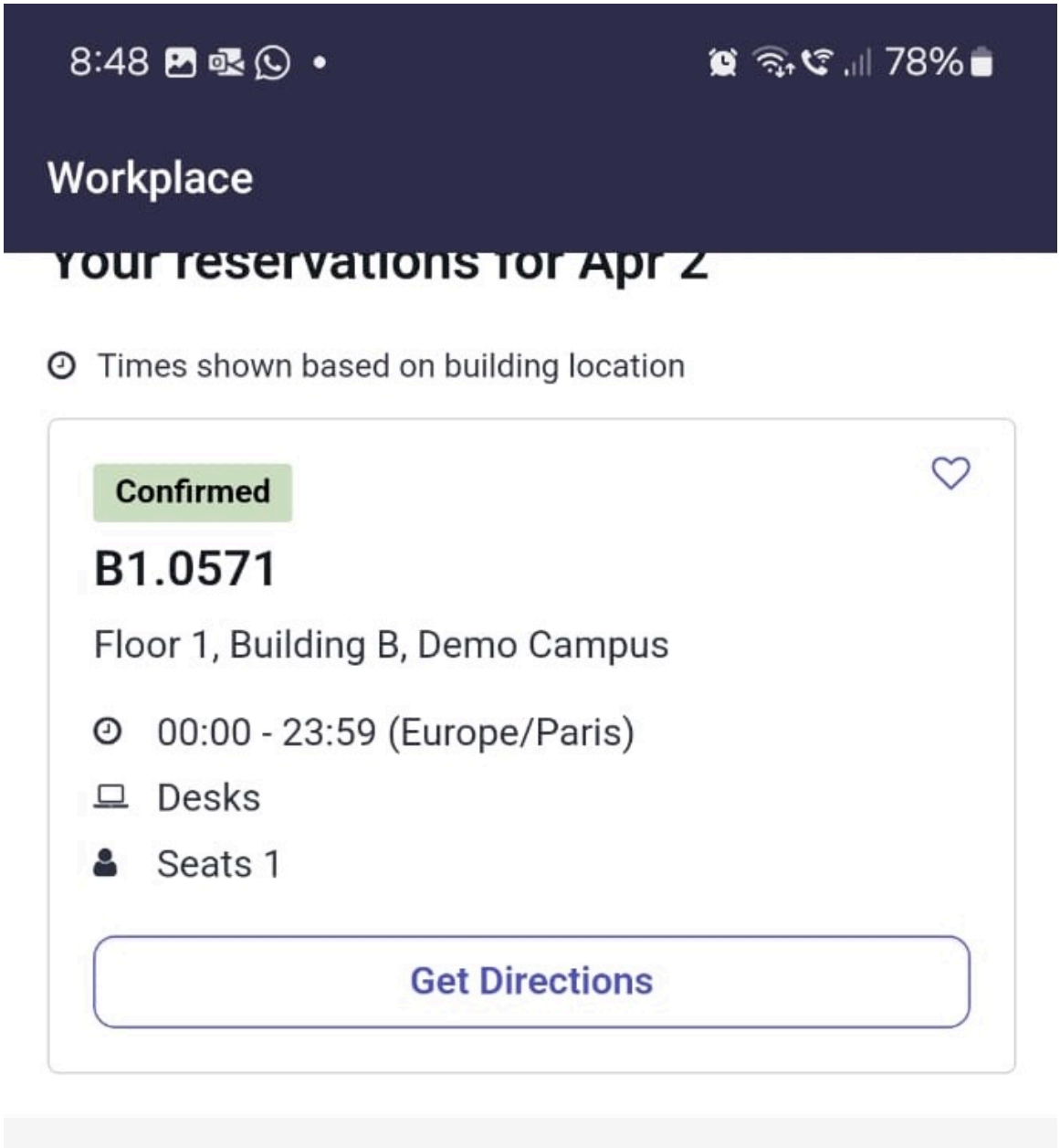



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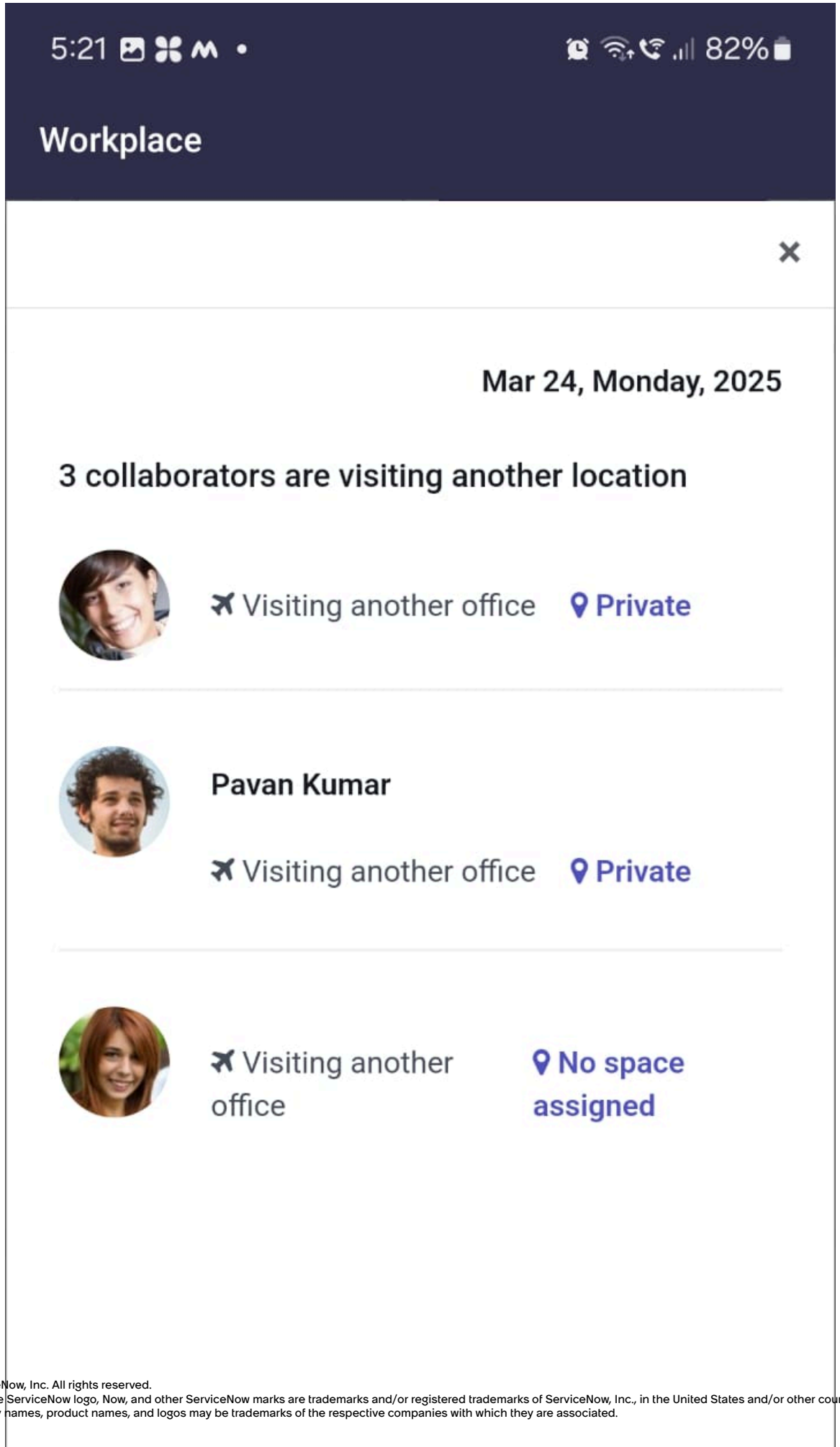

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14. Review your in office days insights for a selected date.

    If all your preferred collaborators are planning to be in office on your in-office day, application shows "100% of your collaborators plan to come to the office". For days when you are working from home or remotely, application shows "No insights present for this date."

Create bulk reservations in Workplace

Create bulk reservations in Workplace using the Workplace Service Delivery for Mobile. Employee can manage multiple planned reservations from the Workplace page.

Before you begin

Create bulk reservations using the Workplace page. Select multiple days in the Schedule calendar view and reserve all selected days simultaneously. Check in or check out reservations, edit reservations, view reservation summary details, or cancel a reservation using Workplace. Manage your reservations and presence information using your mobile app. Change your **Remote** working days to **In-office** or **Visiting another office** presence days. Select your preferred space or desk. Add or edit workplace services to your reservations.

Note: The *sn_wsd_concierge.workplace_day_selection_limit* property is configured by your administration for enabling multiple days selection on the Workplace page. This property when set to an integer value (for example, 3, 5, and so on) enables employees to select multiple dates or days on the calendar to make bulk reservations. For example, if this property is set to 5, employees can make bulk reservations and select only five dates or days on the calendar to make bulk reservations. For more information, see Properties installed with Workplace Concierge.

If the Reservable Module Configuration property *Max days in future* is set to 5 days by your administrator, and the *sn_wsd_concierge.workplace_day_selection_limit* property is set to 6 by your Workplace administrator, employees can select only five dates or days on the calendar for making bulk reservations. The least minimal value is selected for default bulk days selection the calendar by the application.

Make sure that you have the following applications:

- Workplace Service Delivery for Mobile
- Workplace Core
- Workplace Reservation Management
- Workplace Concierge
- Indoor Mapping
- Workplace Central
- Workplace Space Management
- Workplace Space Mapping

Role required: sn_wsd_core.workplace_user

Procedure

1. Log in to the Now Mobile® app.
2. Access your Workplace Service Delivery for Mobile instance.
3. Tap and select the **Workplace** location pin icon ( ) from the mobile home page.

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The location pin changes to a blue pin icon ( ). The Workplace page opens for you to reserve your preferred workspaces, coordinate your workdays and collaborate with your preferred collaborators.

4. Tap the **Select Multiple days** toggle button.
   Make bulk reservations or select multiple days on the calendar to make multiple reservations at once. When this toggle button is selected, users can select multiple days on the calendar for making reservations. When you turn on the toggle **Select multiple days** the calendar is expanded by default and shows a month view.

   Note: If the employee selects or manually enters past timings on the reservation page, it resets to the n-1 slot. For example, if the current time of building is 2:00 PM (n), the available time slots are from 1:30 PM (n-1) onwards. When you manually enter 1:00 PM in the Start time, the time is reset to 1:30 PM (n-1).

   Past dates are disabled on the calendar view and are not visible to workplace employees when the **Select multiple days** toggle button is selected. Only the current date and future dates are available for selection on the calendar.

   If the Workplace Concierge property (*sn_wsd_concierge.allow_overlapping_reservations*) is set to **Yes**, the dates on which you are already having an existing reservation are not disabled and displayed with a dot on the calendar. If this property is set to **No**, the reserved dates on the calendar are disabled and employees cannot select those dates. If overlapping reservations are allowed, the **In office** days are selected. This also includes exceptions when the employee plans to be in the office (changing the Remote day to In-office day) and when the employee is visiting another office. If overlapping reservations are not allowed, only allowed days indicated as **In office** are selected. This also includes exceptions where the employee is visiting another office.

   Note: If the sn_wsd_concierge.allow_overlapping_reservations property is set to *false* by your workplace administrator, you cannot create an overlapping or parallel reservations for a day. You can make only a single reservation for a day.

   Note: If you try to select a date which is labeled as **Remote**, the Remote day is changed to an **In-office** presence day and this record is updated in the Employee Presence Exceptions table (**All** > **Workplace Concierge** > **Employee Presence** > **Exceptions**). The **Location** column in this table is updated with the building name that you using to reserve a space for your **In-office** day. For more information, see Components installed with Workplace Concierge.

5. Tap and remove dates from calendar that are selected by default and select few days of your choice.

   Note: You can only those number of dates on the calendar that is set by your administrator in the *sn_wsd_concierge.workplace_day_selection_limit* property.

   If the user has no reservations for a selected day, a message appears 'You have no reservations for the this day".

   When there's no reservations for a selected workday, the application shows "You have no desk reservations for today." If you don't make a reservation, application shows "You have not made a reservation for this week's in-office day for (<date and month name>)". If you select a remote day, application shows "You are working from home this day."

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6. In **Space suggestions** list view, review the suggested workspaces before making bulk reservations.

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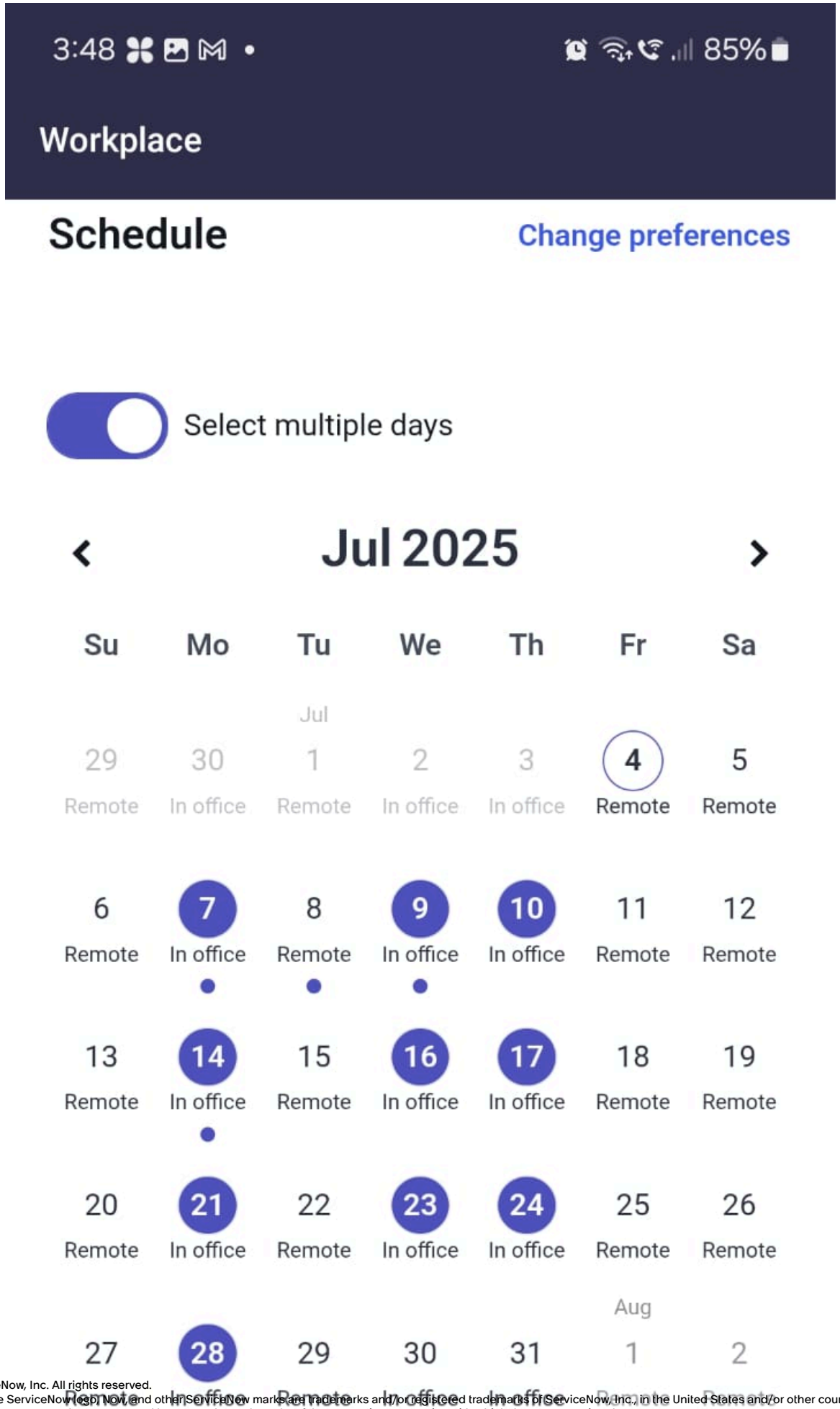

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Application provides workspace suggestions based on the following employee preferences and usage:

- Past and future reservation data
- Frequently used desk or workspace
- Preferred locations
- Favorite spaces
- Preferred workplace services
- Preferred collaborators

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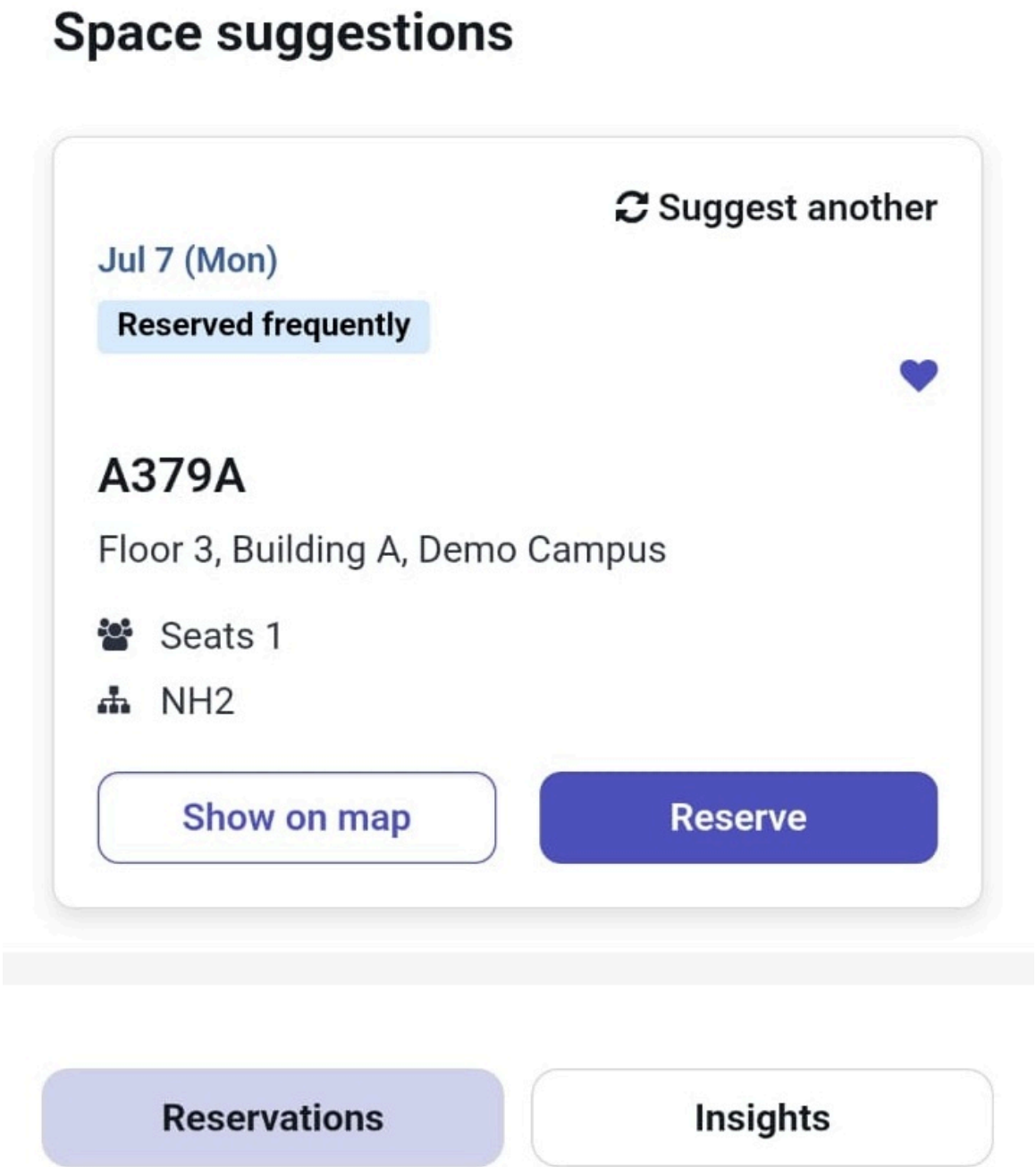

The tags displayed on a suggested space is fetched from the Space Suggestion configuration table. These tags are displayed on the Space Suggestions card. For example, **Reserved frequently**, **Near your location**, **Your favorite**, and so on. When an employee is visiting another office, the suggestions are provided from the office that an employee is visiting and is not based on the employees in-office preferences set in the Presence dashboard. For more information, see Space suggestion Configuration and Properties installed with Workplace Concierge.

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7. To update or change a suggested workspace from Space Suggestions, select the **Suggest another** refresh button icon ().

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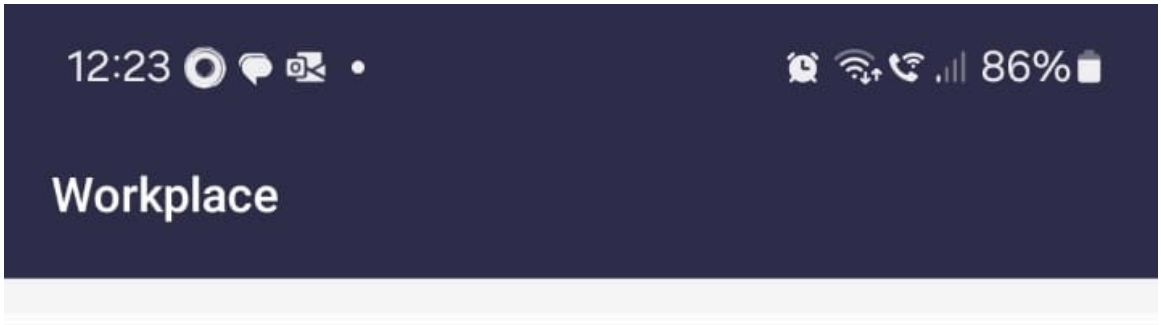

Space suggestions

Still looking for a space that fits your requirements? Click here to review suggestions again.

Search all spaces

Suggest another

Jul 16 (Wed)

Reserved frequently

B 2F 2 009

Floor 2, Building 1, Delaware Campus 2

Seats 1

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suggestions when an employee taps and selects the refresh button repeatedly. After the tenth attempt, the application shows a message, " Still looking for a space that fits your requirements? Click here to review suggestions again." Selecting **Click here to review suggestions again** displays a list of new workspace suggestions.

> **Note:** If there are no available spaces based on employee preferences, the **Suggest another** refresh option can also show a single space or few spaces (and not the 10 preferred available spaces always).

To review previous suggestions, tap and select "Click here to review suggestions again".

8. **Optional:** Select **Search all spaces** if you don't find the workspace that you are looking for. Selecting **Search all spaces** opens the Make a reservation page on your mobile app. If you want to reserve a space than what is suggested in the Space Suggestions card, use the Make a reservation page to reserve a space.
9. Select **Reserve Selected days** to reserve multiple spaces shown in the Space Suggestions card.
10. Tap and select **Clear selected days** to remove a selected date or dates from the calendar before making bulk reservations.
    You can also clear selected dates by tapping the selected dates on the calendar. When you tap a date, the date is removed from your selection and space suggestions are not shown for the unselected dates.
11. Tap the **Reservations** tab to view all your reserved spaces in an Agenda view.

    The Agenda view shows all your existing reservations. It shows all reservations that you have made using the Advanced Reservation portal and reservations created using the mobile app.

12. Tap a reservation on the Agenda view and select the more information icon (⋮) to open the Actions menu.

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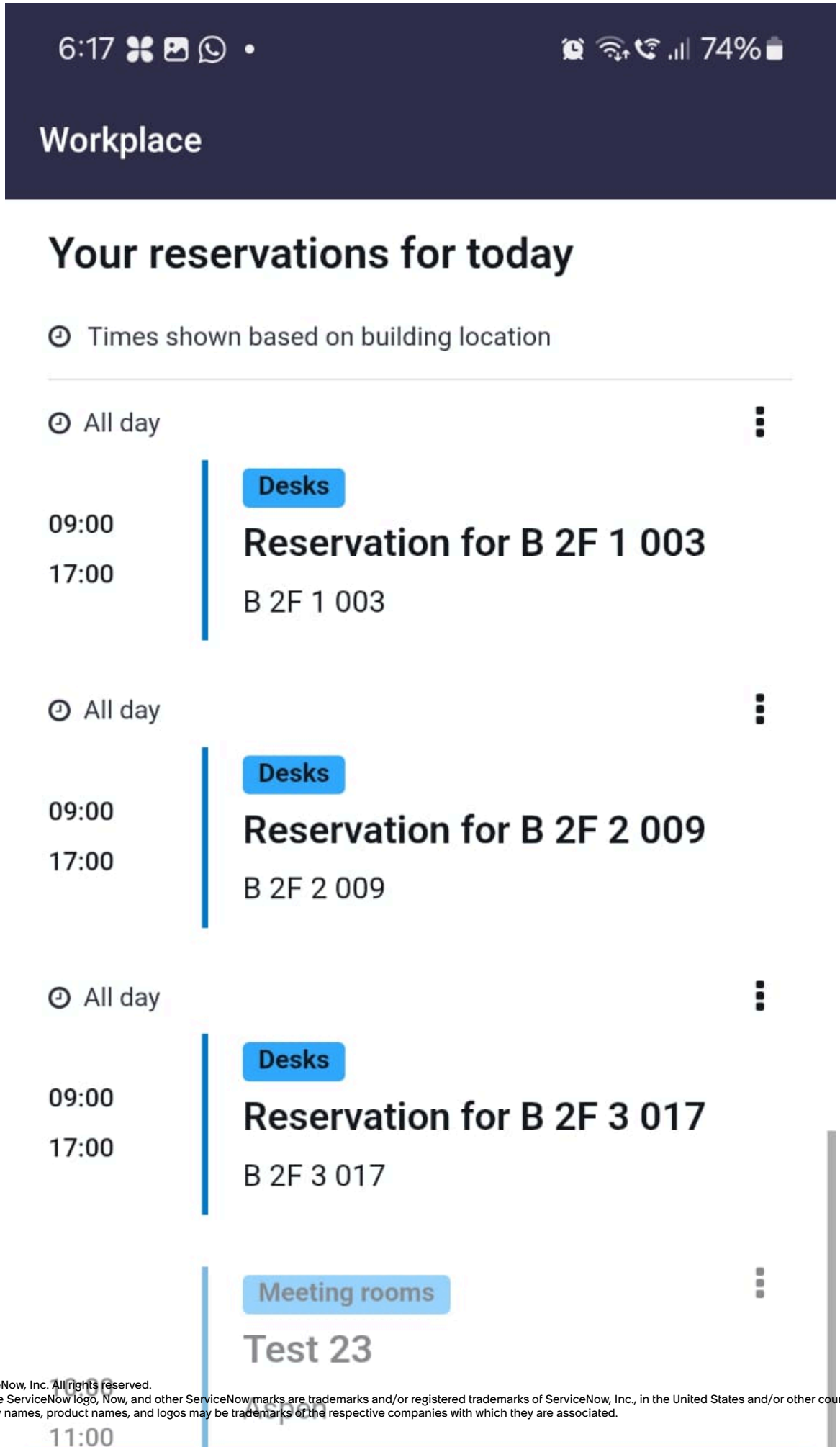

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Reservation timings are based on the **All day**Reservable module configuration set by your administrator. When **All day** is enabled and **All day meaning** is set to **Full day**, you can make a reservation for full day (one day or entire day based on your building timezone). For Example, reservation timings is shown from 10.25 to 23.59 based on your office full day time zone settings. For more information, see Configure a reservable module.

13. Review the different types of reservations that you have made in the Agenda view.

    The reservations from both Reservation portal and mobile application is shown in the Agenda view. It also shows the labels for different type of reservations. For example, **Group**, **All day**, **recurring (multi-day)**, **multi-building**, **neighborhood**, and so on. **All day** reservations are shown on the top and then other types of reservations are shown in the Agenda view.

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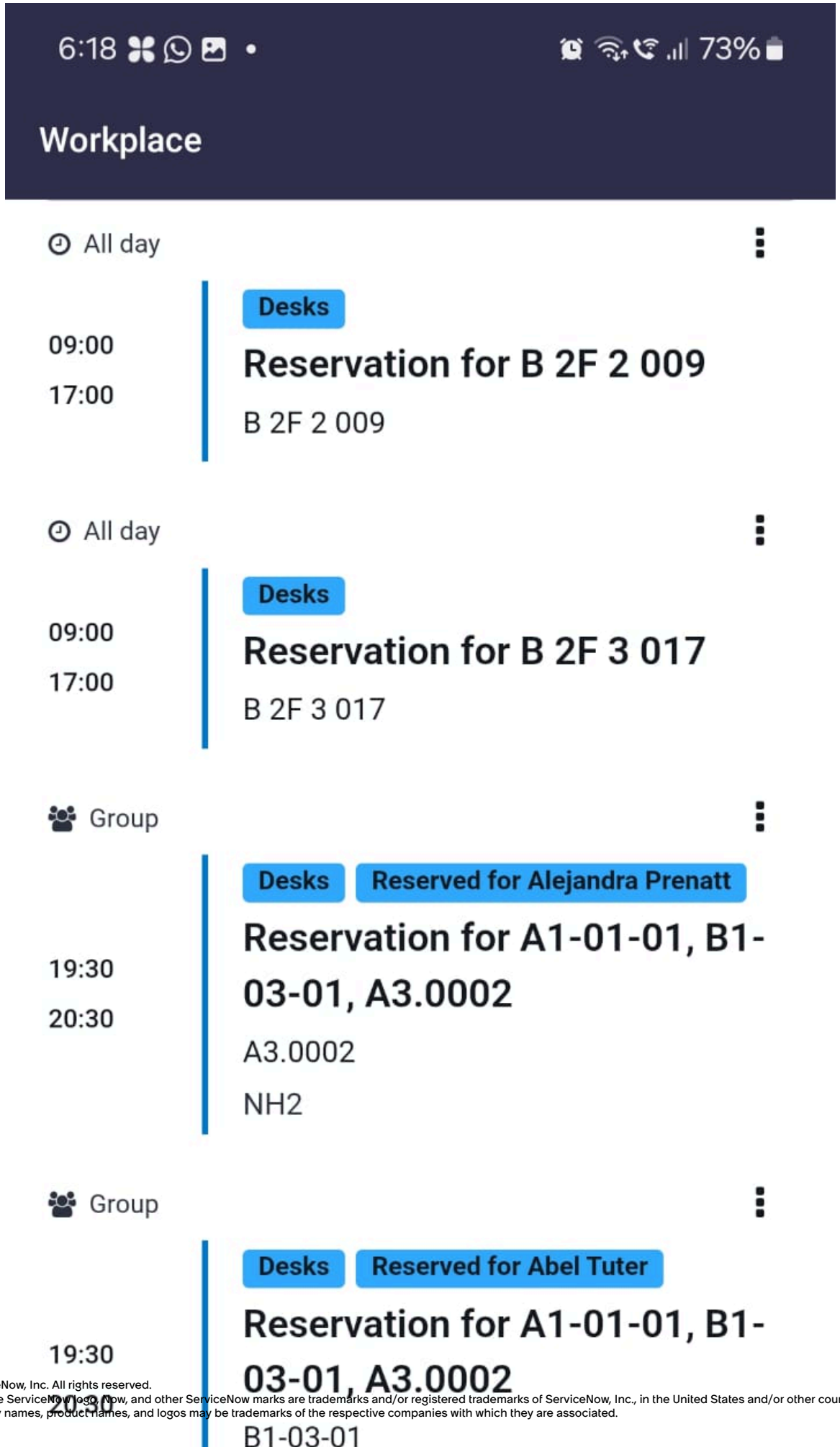

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14. Select the Actions menu items to complete the following:

    a. Select the Actions menu icon (⋮) adjacent to a reservation in the Agenda view to open the Actions menu.

    b. The Actions menu shows the following options:

    - Check in or Check out
    - Cancel Reservation
    - Edit Reservation
    - View reservation information
    - Show on map

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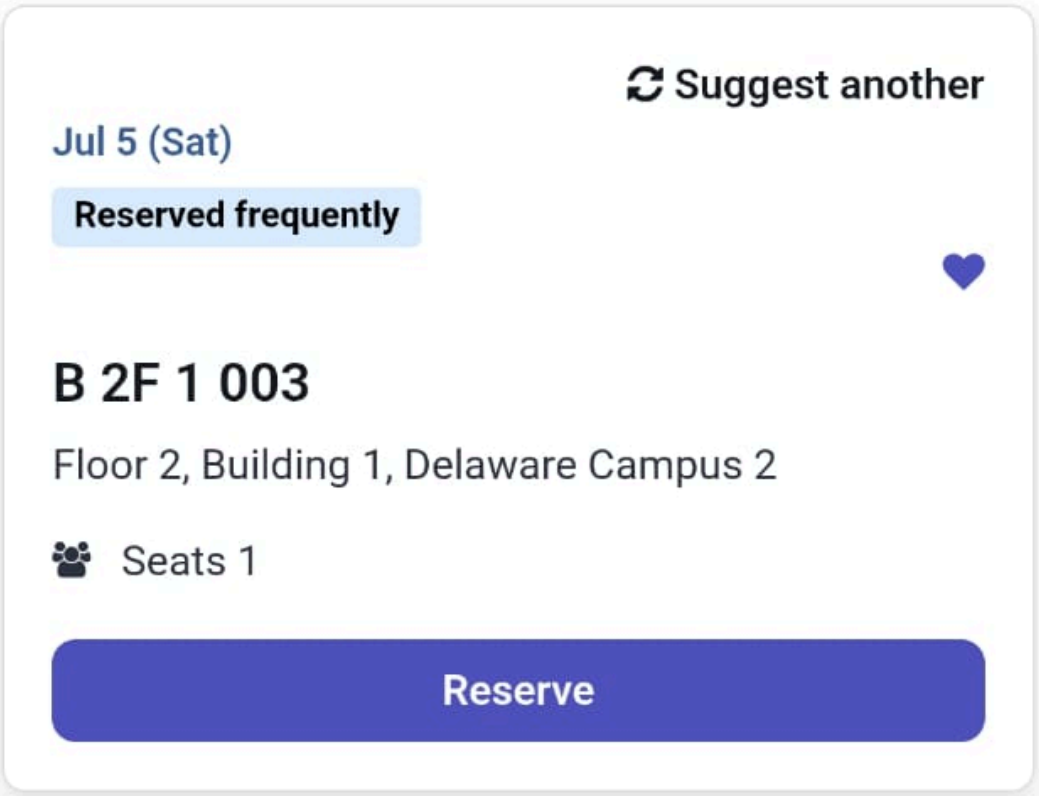

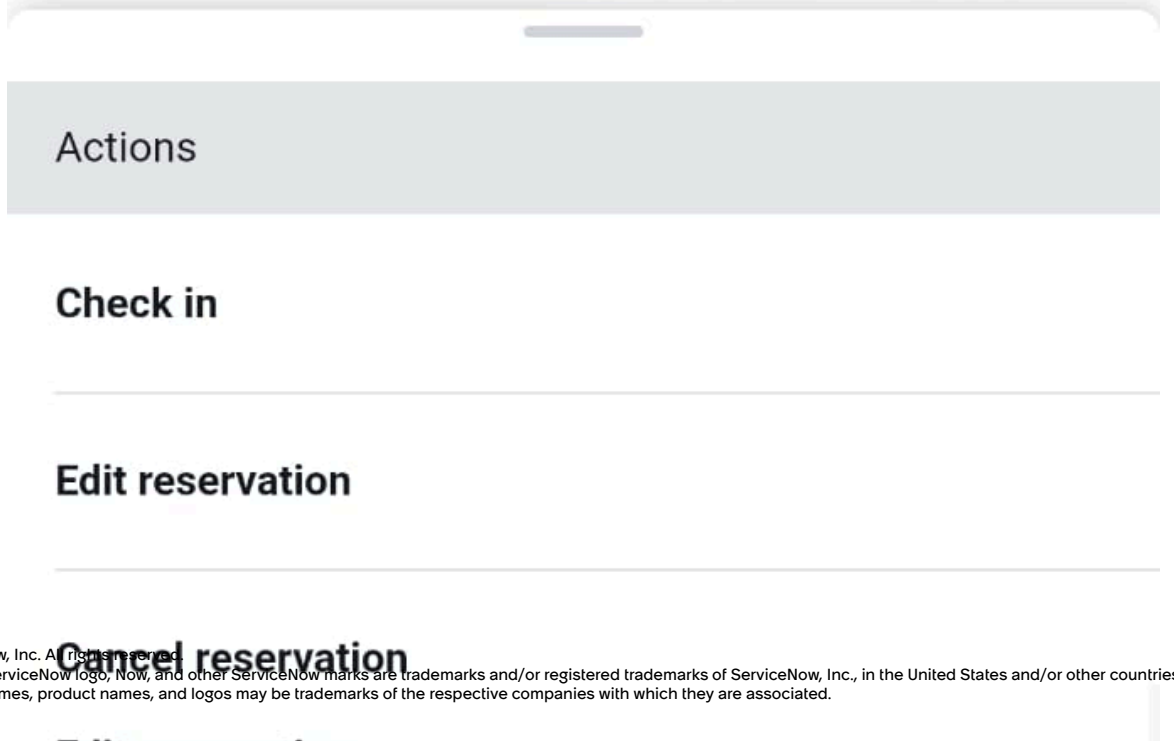

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c. Select **Check-in** to check in a reservation.
After a reservation is checked in, you see the **Check out** option to check out your reservation.

d. Select **Edit Reservation** to edit a location, date and time for your reservations.

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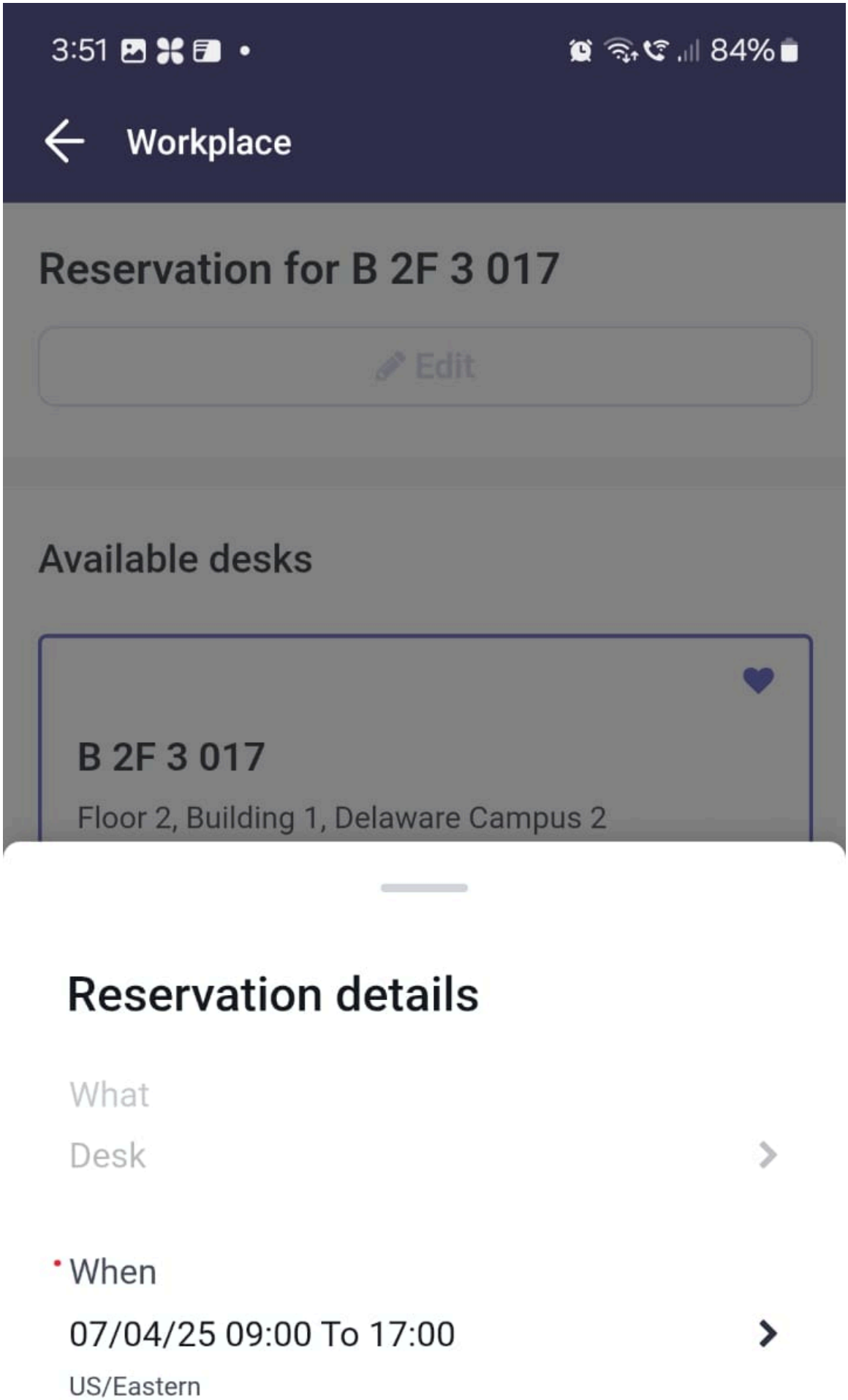

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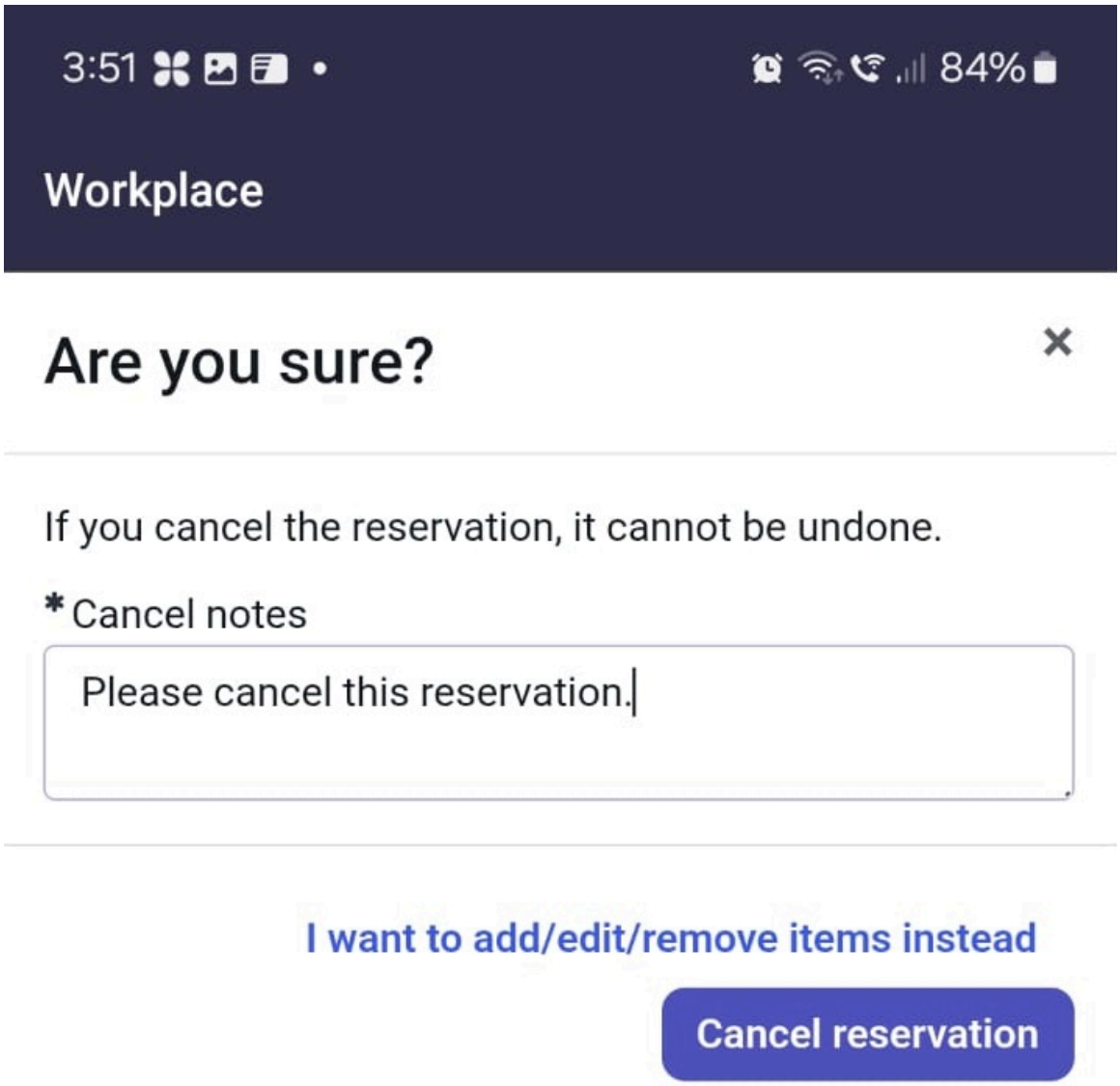
Update your reservations to remove or edit workplace services using the Update reservation details page. For more information, see Review and edit your reservations in Workplace.

e. Select **Cancel Reservation** to cancel a reservation.

Employees can directly cancel a reservation if the reservation doesn't require cancel notes. The option to add a cancel note is set by your administrator in the Reservable Module Widget Configuration. For more information, see Configure a reservable module.



Select **I want to add/edit/remove items instead** to update workplace items in a reservation.

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The option to add a cancel note is set by your administrator in the Reservable Module Widget Configuration. For more information, see Configure a reservable module.

f. Select **View reservation Information** to review the Reservation summary for a selected space.

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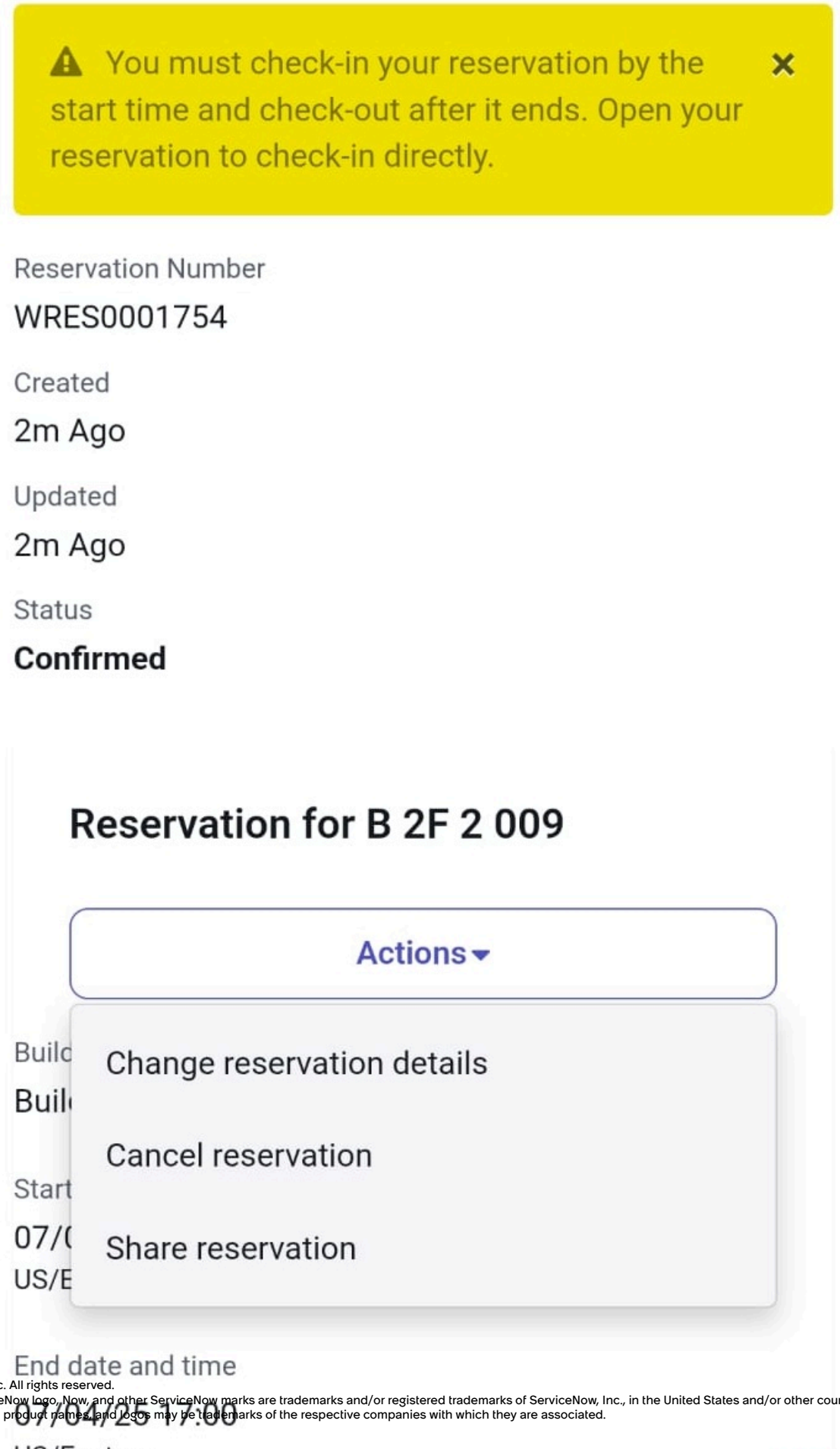

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g. Select **Show on map** to open the location directory page and reserve a space using a floor map.

Review and edit your reservations in Workplace

Update or edit reservations in Workplace using the Workplace Service Delivery for Mobile application. Update your location, date, and time of your existing reservations.

Before you begin

Make sure that you have the following applications:

- Workplace Service Delivery for Mobile
- Workplace Core
- Workplace Reservation Management
- Workplace Concierge
- Indoor Mapping
- Workplace Central
- Workplace Space Management
- Workplace Space Mapping

Role required: sn_wsd_core.workplace_user

Procedure

1. Log in to the Now Mobile® app.
2. Access your Workplace Service Delivery for Mobile instance.
3. Tap and select the **Workplace** location pin icon () from the mobile home page.

   The location pin changes to a blue pin icon (). The workplace screen appears for you to coordinate your workdays and collaborate with your preferred collaborators.
4. Create a reservation for a day or create bulk reservations.
   For more information, see Create a reservation for a day in Workplace and Create bulk reservations in Workplace.
5. Select the **Reservations** tab.
   By default, the **Reservations** tab is selected.
6. Review your reservations available in **Your reservations for today** (in case of a single day reservation) or **Your reservations for <selected-date>** (in case of bulk reservations) Agenda view.
7. The agenda view shows all reservations created from using the Advanced Reservation web portal and the Now Mobile® app.
   You can view the type of reservation in the agenda view. For example, All day, Group reservation, neighborhood reservations, and so on.

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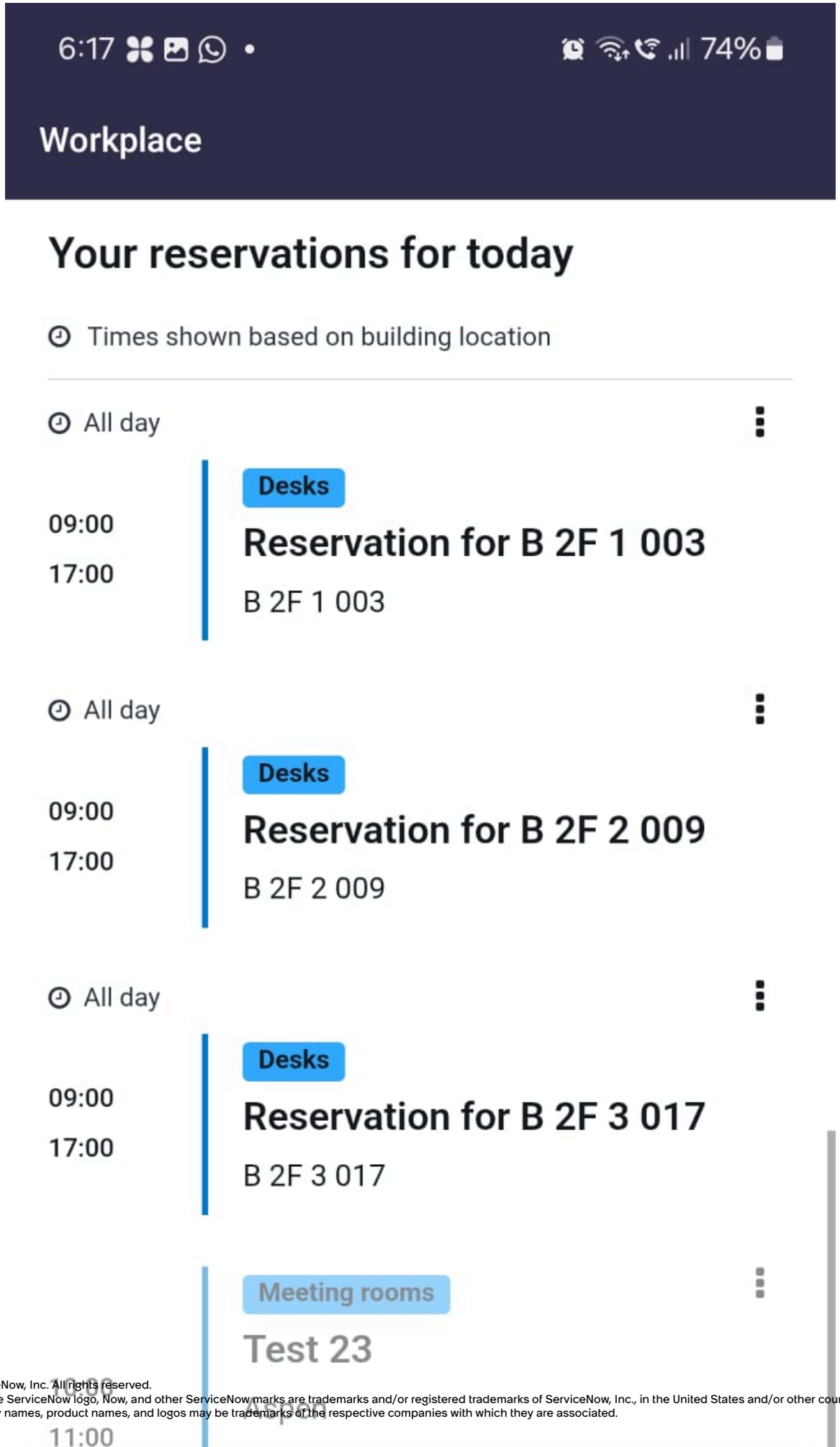

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8. Select the Actions menu icon (⋮) for a reservation.

   Agenda view shows Actions menu items.

   a. Edit reservations: Select **Edit reservations** to edit an existing reservation and update it with a new date, time, and location.

      The Update reservation page opens.

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Reservation for B 2F 3 017

July 10, 9:00 AM To 5:00 PM

Delaware Campus 2, Building 1, Floor 2

Edit

Available desks

B 2F 3 017

Floor 2, Building 1, Delaware Campus 2

Seats 1

Details

Reserved frequently

B 2F 1 003

Floor 2, Building 1, Delaware Campus 2

Seats 1

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Update your reservations to change the start time and date or end time or date and the location. You can also remove or edit workplace services from your existing reservations. After you update a reservation, the reservation subject name is changed automatically to the space name for which you are updating the reservation. For example, Reservation for C1-04-01, where C1-04-01 is the space name.

Note: When you try to edit a group reservation, the **Edit Group Parent** option is available for a group reservation. Selecting this option opens the group parent reservation in the Reservation Summary Page. For more information about how to create a group reservation, see Create a group reservation.

b. Select**Edit**.

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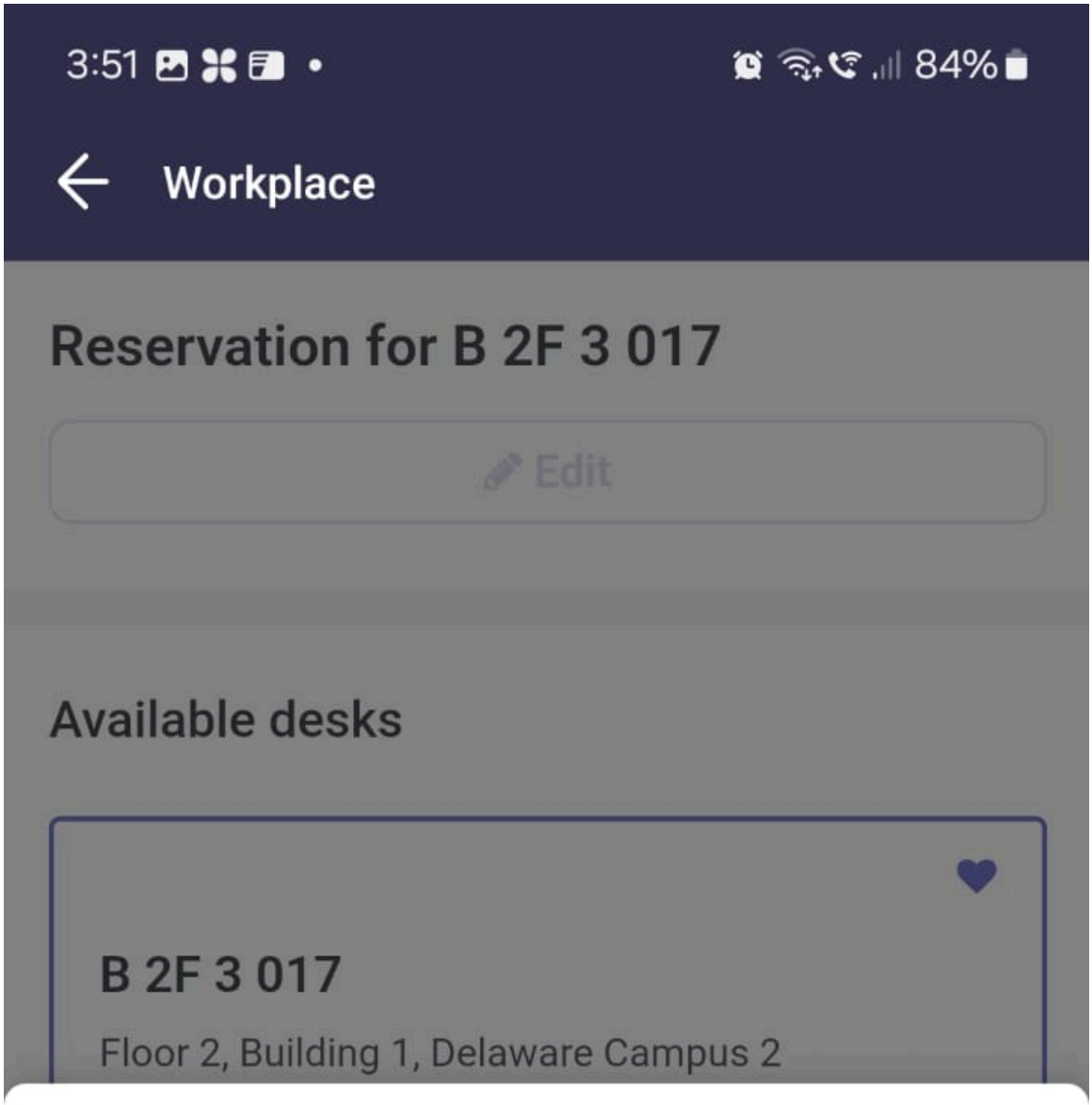

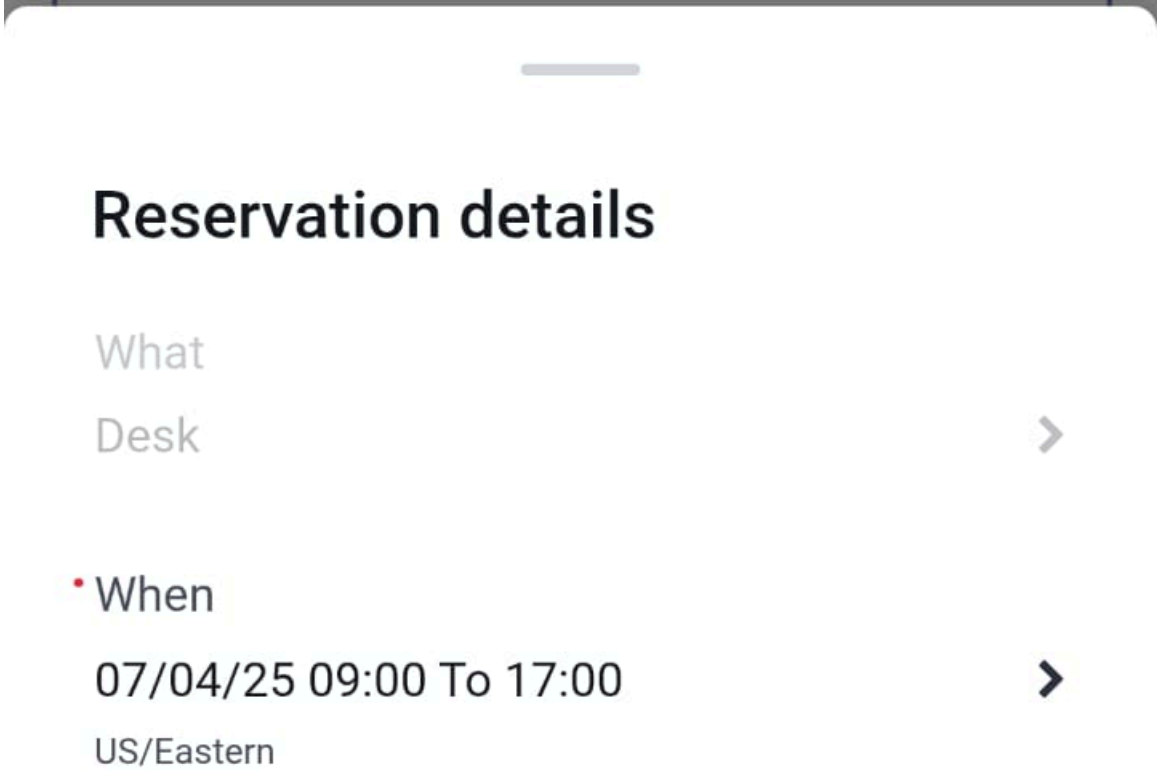

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Note: You cannot change the Reservable Module Configuration (for Example, **Desks**) when you are updating a reservation. This option is inactive or in a read-only mode by default.

c. Select **When** to open a dialog box to update the date and time of an existing reservation. Enter the new **Date**, **Start time**, and **End time** for updating a reservation. Tap **Select** to update the date and time of your reservation to find an alternative space.

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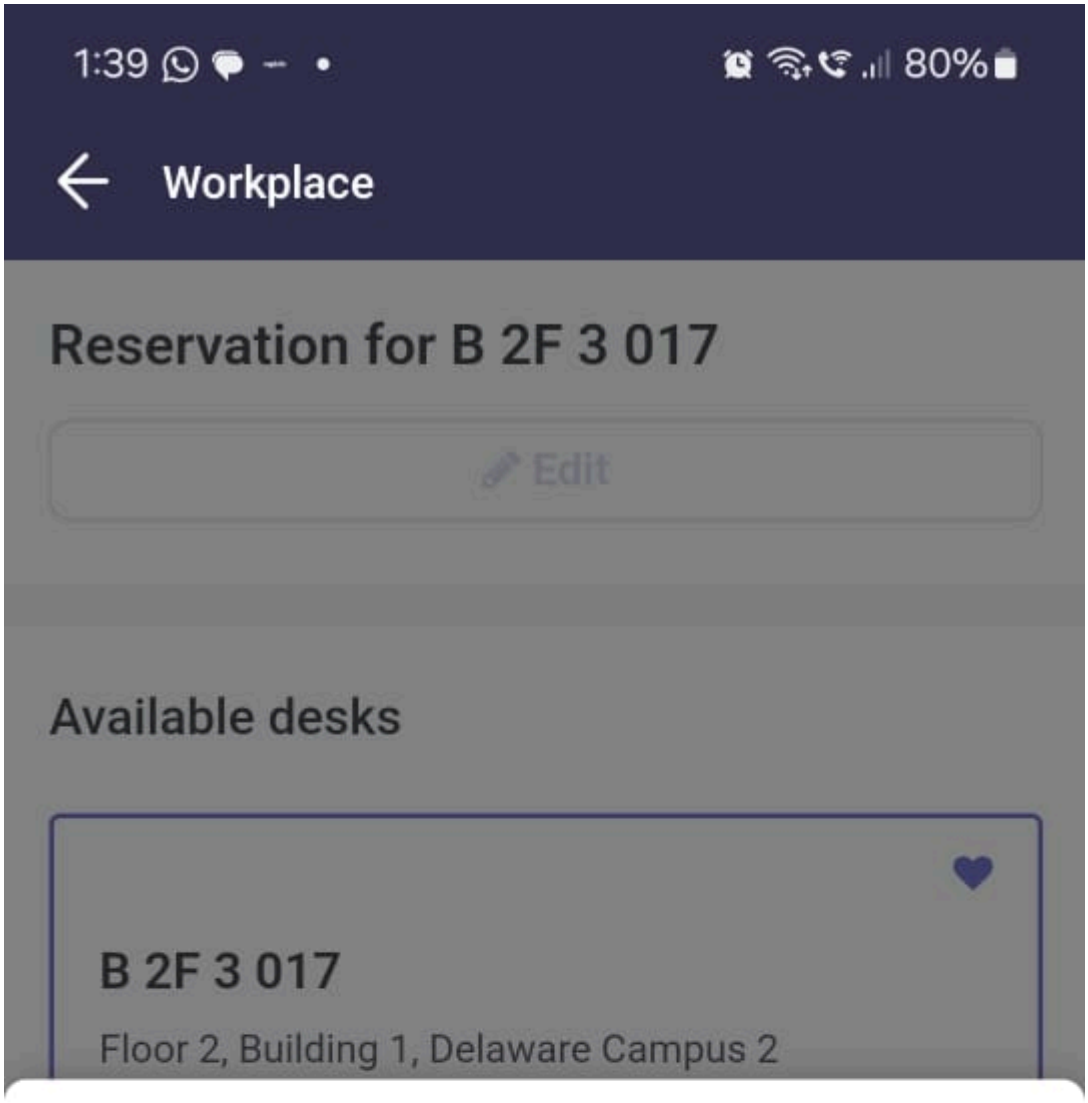

When

Date

07/10/25

Start time

9:00

End time

17:00

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d. Select **Where** to open a dialog box.

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Enter the new location to update an existing reservation's location. Update the **Campus**, **Building**, **Floor**, and **Preferred Neighborhood** of a reservation. Tap **Select** to update the location of your reservation to find an alternative space.

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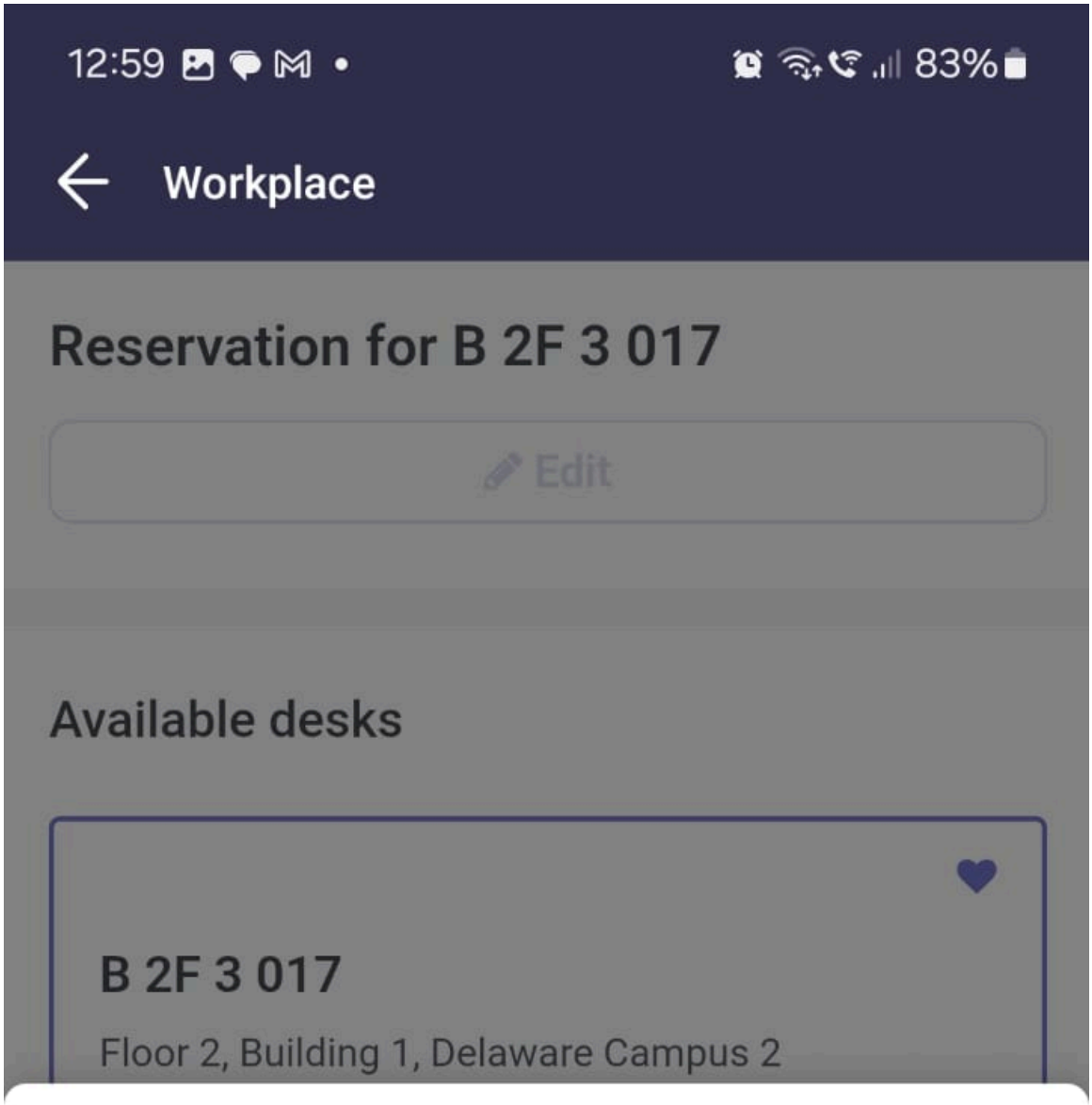

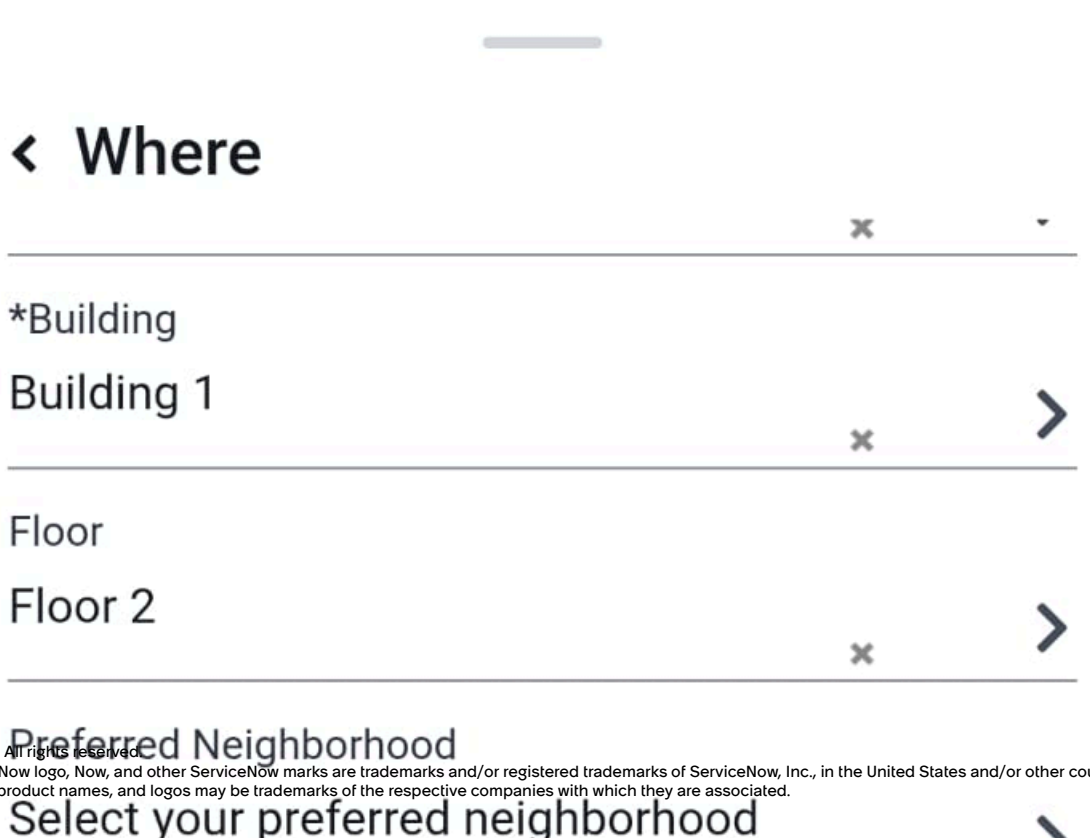

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9. Select **Update reservation** to update your reservation.

Using Workplace Service Delivery for Mobile

Use the Workplace Service Delivery for Mobile for making reservations using the Now Mobile app. Edit or update reservations, sharing reservation details with workplace users, for wayfinding.

Use workplace floor maps to find and reserve a space within Workplace Core. To view the maps, use Mappedin and Indoor Mapping.

Search for a campus, building and a space using AI Search

The AI search capability in Workplace Service Delivery for Mobile provides AI contextual search for campuses, buildings, floors, and spaces.

Before you begin

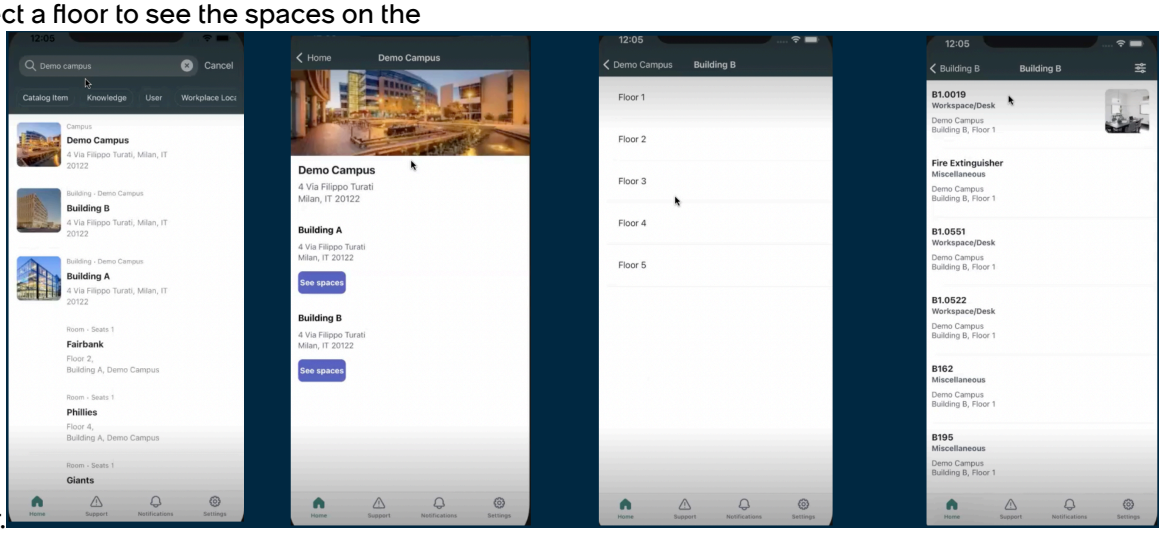
Role required: sn_wsd_core.workplace_user

About this task

Ensure that you have installed and configured AI search for Workplace Service Delivery for Mobile before searching for a campus, building, or space using AI search.

Procedure

1. Login to Workplace Service Delivery for Mobile mobile.
   The Welcome page appears.
2. In the search box, search for a campus or building or a space.
   For example, search for a campus (Demo Campus).
3. On selecting a campus, the campus details appear.
4. Click **See spaces** user is directed to select a floor.
5. Select a floor to see the spaces on the floor.



6. Select a space and click **Submit** to reserve the space.
7. Click **Get Directions** for getting directions in a workplace.

> **Note:** The **Get Directions** option appears only if the workplace has a floor map and you have configured a map provider (**Indoor Mapping** or **Mappedin**) in the Map Properties.

Result

AI search provides better search results based on the following.

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- Recent and popular searches: When tapping the search bar, search results are personalized and based on your recent browse history.
- Auto-correct typos: Incorrect terminologies or words are automatically corrected while entering the search key terms.
- Synonym handling: The search engine looks for synonyms from the search key terms and shows the search results accordingly. For example, type 'Building A', AI searches for Building A as well as all floors that belong to Building A.

Make a reservation using the Now Mobile app

Reserve a workplace location from anywhere and at any time using the Now Mobile app.

Before you begin

Ensure that you have the following applications installed:

- Workplace Core (sn_wsd_core).

  For more information, see Install Workplace Core.

- Workplace Reservation Management (sn_wsd_rsv).

  For more information, see Install Workplace Reservation Management.

- Workplace Service Delivery for Mobile

To view floor maps, you must have the following installed:

- Workplace Space Mapping, Workplace Indoor Mapping, and Mappedin are installed
- Ensure Map view is enabled. For more information, see Enable map view to create reservations.

Note: Creating reservations for shift-based modules aren't supported on native mobile.

Role required: sn_wsd_core.workplace_user

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Procedure

1. On your mobile device, open the Now Mobile app.

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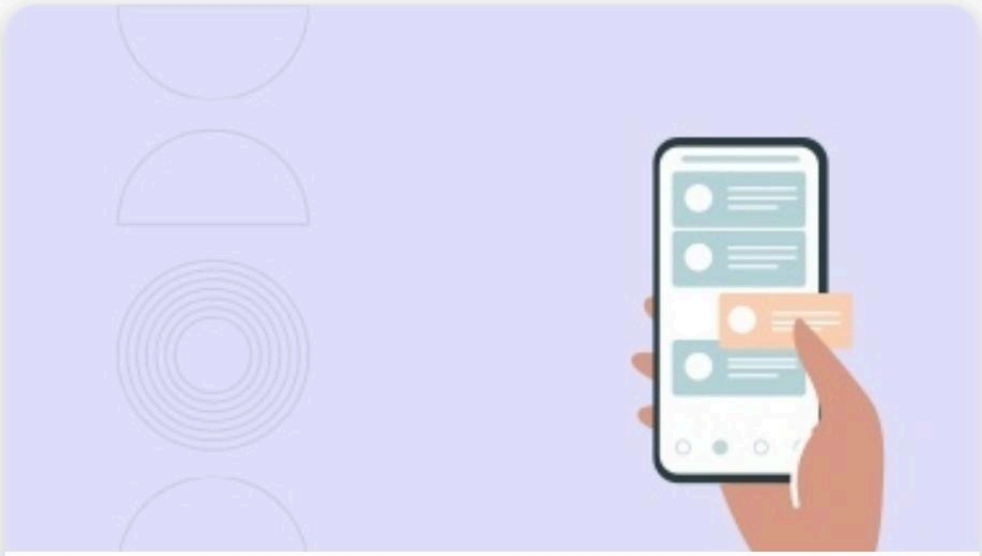

Welcome to Mobile!

Complete tasks, track requests, and discover powerful workplace support at your fingertips.

Quick links

Request IT assistance

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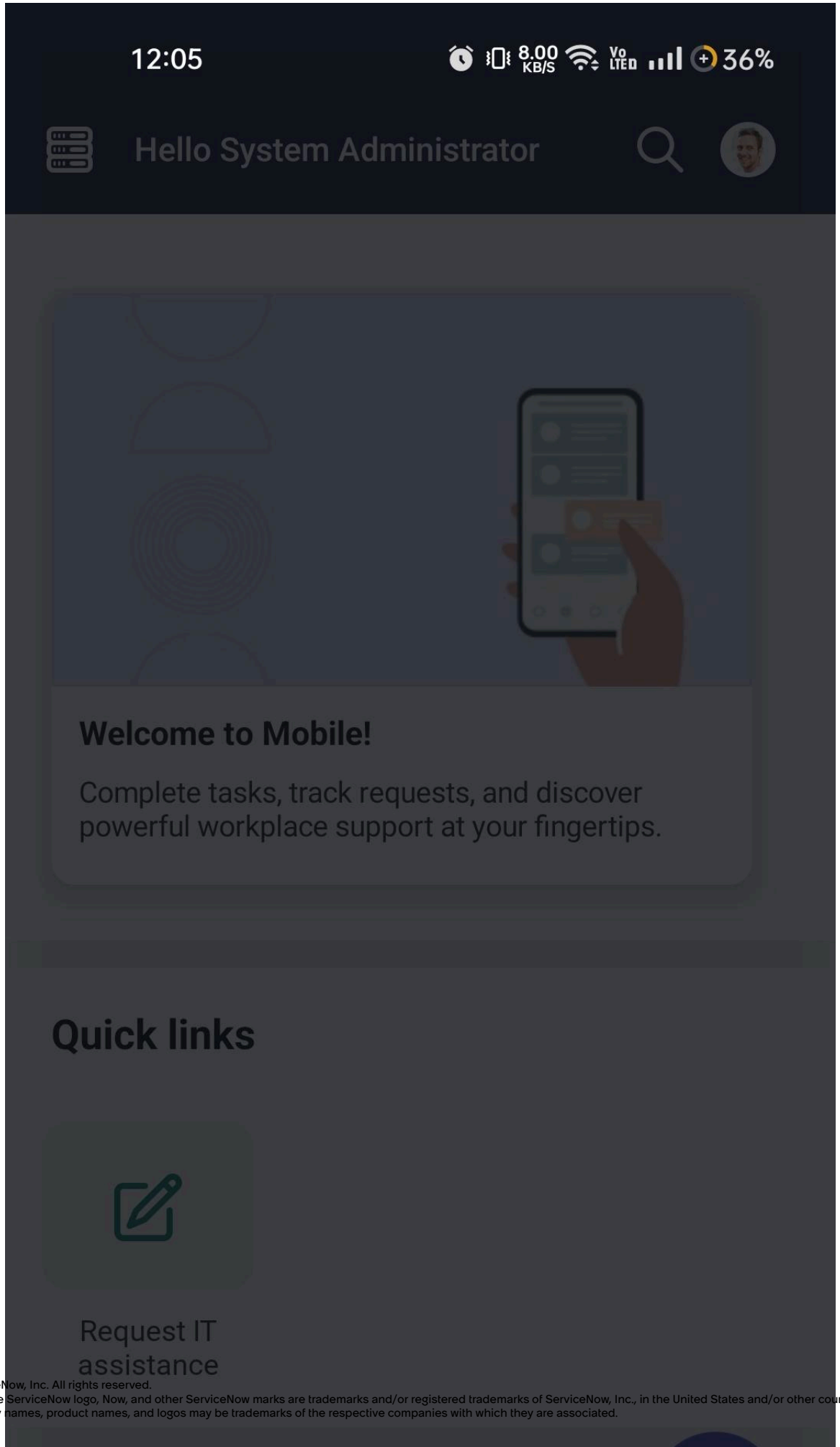

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2. Tap **Make a reservation**.
3. The Make a reservation section shows the Reservable Modules.

   For example: Select **Desks**.

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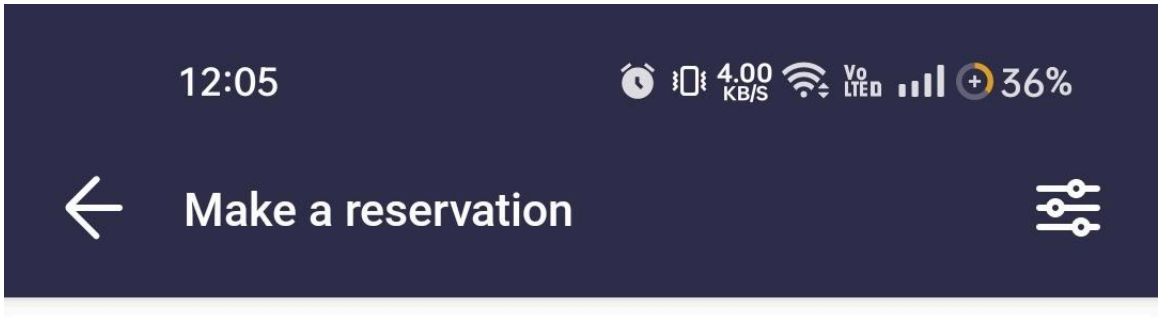


uday desks
Reserve up to 90 days in advance
Reserve for up to 7 days total



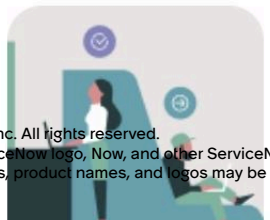
Desks within an area
Reserve up to 180 days in advance



Desks
Reserve up to 90 days in advance



Desks 1
Reserve up to 90 days in advance



Meeting rooms
Reserve up to 180 days in advance

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4. In case, if you have set the Reservable Module property **Max days for multi-day** for two or more days, the **Make a reservation** screen shows the number of reservable days up to which a multi-day reservation can be made.

   The default value of **Max days for multi-day** is 1.

   If the **Max days for multi-day** value is set to 1, only single day reservations can be made and the **All day** option is enabled while making a reservation. If the **Max days for multi-day** value is set to 2 or higher value, the **All day** reservation option is disabled.

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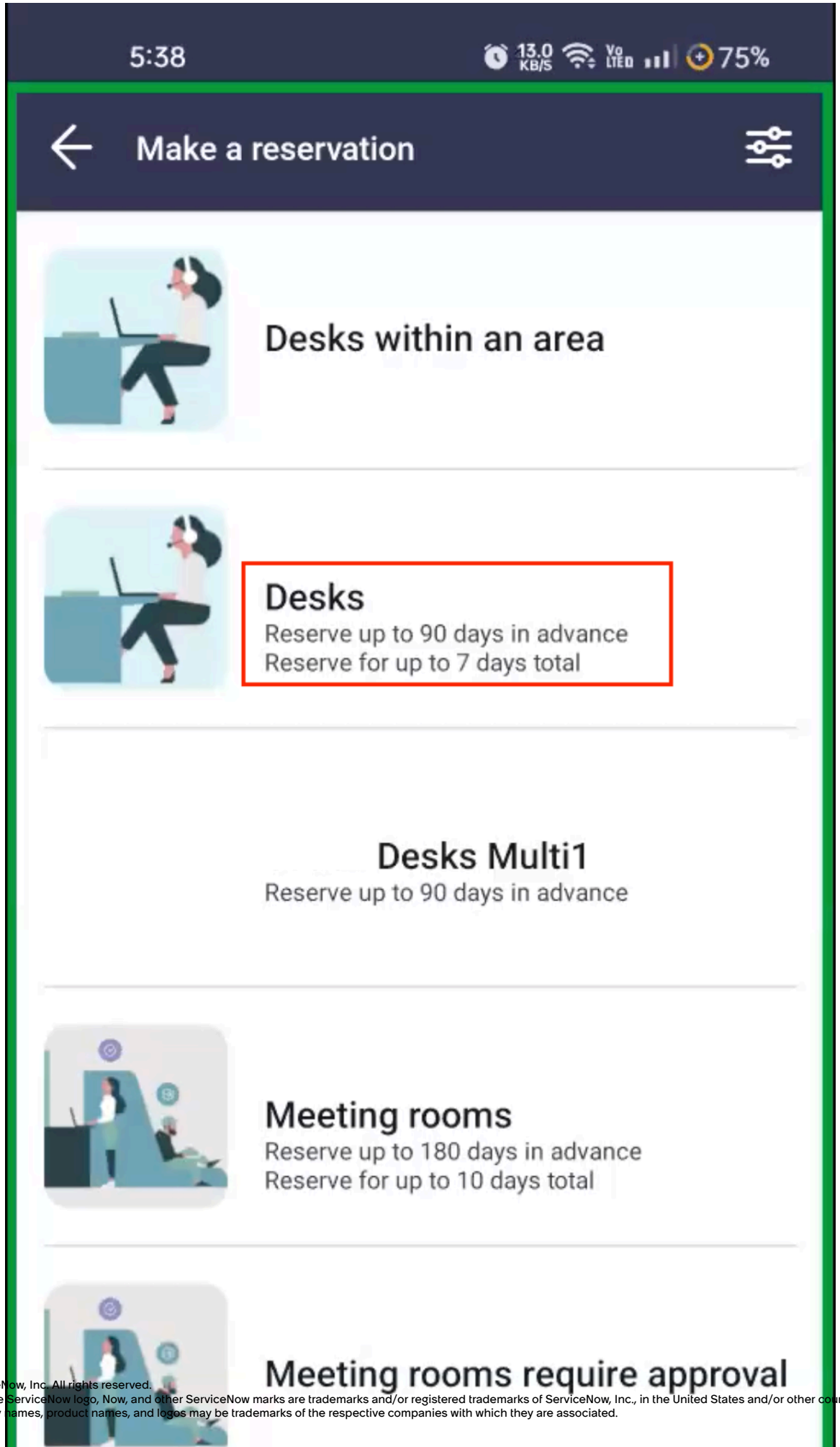

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The **Max days in future** is configured on the Reservable module by your administrator, the number of days in the future up to which the reservation can be made is displayed on the card. The **Max days in future** value is 1 or higher. If an employee tries to select an invalid date range, search results for a reservation aren't returned.

5. **Optional:** To make a quick reservation for any workplace, under the Quickly reserve section, tap **Reserve this location**.
   If you have set any favorite locations in the Workplace Reservation Management Reservation portal, the Quick reserve section displays your favorite location in **My favorites**.

   Note: The workplace type that is available in the Quick reserve section depends on the configuration made by your organization.

6. Select a reservable path.

   Multi-day reservation is available for all the reservable paths. For example: Select Browse all.

   - Browse all
   - Browse near a person
   - Browse by area
   - Browse by neighborhood

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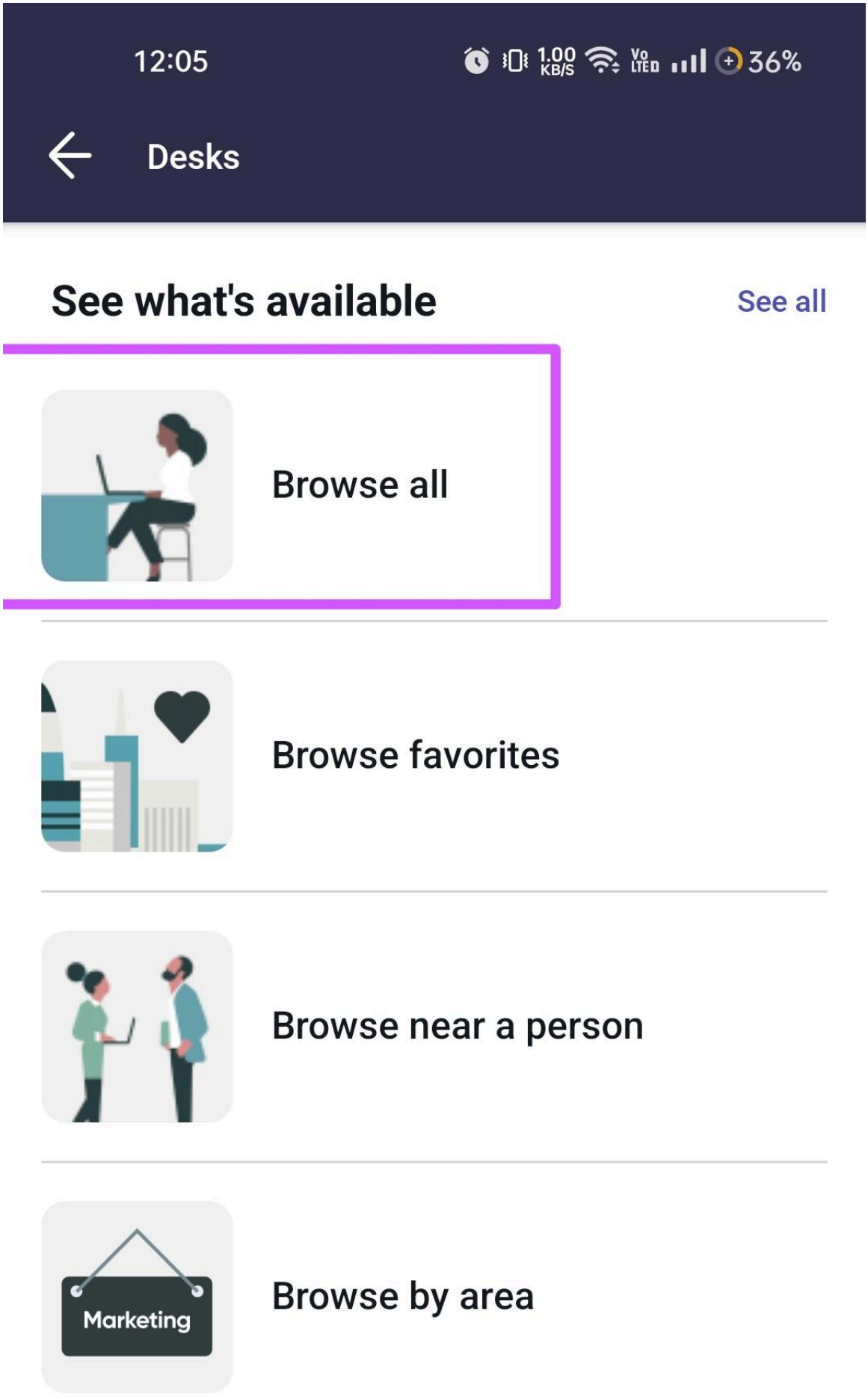

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7. Add room or space requirements.

   a. On the form, fill in the fields.

Create a reservation

Field	Description
Building	Building where you want to reserve the workplace.
Floor	Floor where you want to reserve the workplace.
Reservation start	Start time of the reservation.
All day	Option to enable the **All day** or a single day reservation. Time: All day depends on the start and end day reservation properties set by your administrator.
Start Date Time and End Date Time.	Option to select the Select the Start Date Time and End Date Time. **Note:** Reservable module property for multi-days **Max days for multi-day** is dependent on the Reservable Module **Max days in future** value. You can reserve a space for multi days only within the range (number of days) specified for the **Max days in future** value. If the reservation start date and end date range is more than the **Max days in future** value, the application shows a validation error and the End date and time is defaulted to the current date.
Reservation end	End time of the reservation. This field is automatically set to an hour after the start time.
Capacity	Capacity of the reservation. **Note:** If you're using an iOS device, tap on **Done** after specifying the capacity.
Standard services	Option to select from available standard services based on which the locations must be filtered. **Note:** The field is visible only if you are using Workplace Service Delivery for Mobile version .

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Field	Description
Reservable purposes	Option to select from available reservable purposes based on which the locations must be filtered. The field is visible only if you are using Workplace Service Delivery for Mobile version . If you specified both **Standard services** and **Reservable purposes**, the search returns only those locations that have met both the specified criteria.
Toggle Map view	View the available reservations using a floor map view instead of a list view. The option to view a map is available only if the map property is set by your administrator for a selected space or room. For more information, see Configure the Toggle map view property.

Note: Reservation uses the workplace profile's building, floor, start and end date and time details, in case if no user preferences are set. If the selected space isn't mapped to any area, then the building and floor details are auto-populated or pre-filled in **Browse all spaces**. If a space is mapped to an area, building and floor details are pre-filled in **Browse by area**. If both user preference and a workplace profile exists, user preference takes precedence, and space mapping is done by user preference. The **Browse by area** field is auto-populated based on user preferences and not by workplace profile.

8. Click **Next**.
9. Select the locations that you are reserving.
   Locations that are set as favorite on the Reservation portal are prioritized and displayed in an alphabetical order followed by other workplace locations.
   Tap Building to show the floor level information, and select a floor.

   - On the list view, you can select one or more locations.

     To search for a location, enter the exact location name in the search box.

     Note: If you're browsing a space near a user, only the five most suitable spaces are listed.

   - On the map view, you can zoom in on the map to select one or more locations.

     Use the **All floors** drop-down list to switch between floors.

     Click the **Selected** button to review your selections, or select **All** to navigate back to the map view. You can also select rooms on different floors.

     Note: Map view is available only if it's enabled by your administrator.

10. Click **Next**.
11. **Optional:** To browse all the available spaces, select **Browse all spaces**.

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12. To search for reservable spaces in the context of a neighborhood, select the **Browse by Neighborhood** option.

    Note: **Browse by Neighborhood** option is only available if **Enable browse by neighborhood** option is configured by your administrator.

    a. Specify the following details to search for the most suitable space in an area.

    - **Neighborhood**: Name of the neighborhood.
    - **Building**: Name of the building available in a neighborhood. For example: NBH2
    - (Optional) **Floor**: Floor of the building where you want to make a reservation. The reservation admin can indicate in the Reservable Module if an employee can use a floor in the search.
    - **Start date and time**: Date and time when you would start using the workplace item. The time is displayed based on the selected building's time zone.
    - **End date and time**: Date and time when you would stop using the workplace item. The time is displayed based on the selected building's time zone.

13. **Optional:** To reserve a space from your favorite space, tap **Browse favorites**.
    The spaces that you have set as favorite using the Workplace Reservation Management Reservation portal are displayed with the favorite icon (♡). If you want to set any location as favorite, refer to Set a location as favorite using the Space details page.

    Note: The favorite option appears only if you have Employee Center 25.0.0 and if your administrator has configured the settings.

14. **Optional:** To reserve an available space near a person, tap **Browse near a person**.

    a. Select the user near whom you want to reserve a space in the **Look for spaces near this colleague**.

    Note: If there are any private reserved spaces near the person, then they aren't displayed in the search result.

    b. Select a reservation made by the user in the **Choose colleague's reservation**.

    c. **Optional:** Select **Toggle Map view** to review the available reservations using a map view instead of a list view.
    This option is available only if activated by your administrator.

15. **Optional:** To reserve an available space in a particular area, tap **Browse by area**.

    a. Select the **Building** of the area where you want to make a reservation.

    b. Select the **Area** where you want to make a reservation.

    c. Select a start date and time in the **Start date and time**.

    d. Select an end date and time in the **End date and time**.

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e. **Optional:** Select **Toggle Map view** to review the available reservations using a map view instead of a list view.
The available favorite space is highlighted on the map.

> **Note:** This toggle is available only if activated by your administrator.

f. Select a floor from the **Floor** drop-down list on the Map view.
For example: Floor 1.

g. Available spaces belonging to a neighborhood for a building are shown.

16. Tap **Next**.
17. On the Map view, select **Get Directions** for wayfinding and indoor navigation.
For more information, see Work with Location Directory for Now Mobile app.
18. Click **Submit**.
In personal authentication mode, to reserve a sync-enabled room, you must check your email and click the link to log in to Microsoft Exchange. After logging in and obtaining the token through the redirect link, you can return to the reservation screen and submit the reservation.

> **Note:** In personal authentication mode, to reserve a sync-enabled room in Google Calendar, open your email and use the provided link to log in with your Google Calendar credentials. Once you have logged in and received the token via the redirect link, you can go back to the reservation screen and submit the reservation.

19. The Reservation Information screen shows the **Details** tab with reservation details.

    In the case of multi-day reservation, the Reservation Information screen shows the number of days in a series for which a space is reserved (start date time and end date time).

Reservation Details

Field	Description
Give your reservation a name	Option to provide a subject or name for your reservation.
This reservation is for	User name. For example: Abel Tuter.
Start Date and time	Reservation start date and time.
End Date and time	Reservation end date and time.
Virtual Meeting link	Option to generate a virtual meeting link so that remote employees can join the reservation.
Additional message	Users can view the meeting note for a reservation on the mobile app. Employees can't add or update the meeting note on the mobile app. They can only view it. The meeting notes can be added on the advanced reservation web portal.
Workplace location	Workplace reservation location.
Floor	Floor name.

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Field	Description
Building	Building name.
Sensitivity	Subject appears on your calendar and is viewable by everyone except when the reservation sensitivity is set to private.
Make all Space details private	Specify your privacy preferences. **Note:** This option is displayed based on the privacy setup made on the selected space. You have the following options to set your reservation to: ○ None ○ Normal ○ Private ○ Confidential
Check-in-state	Awaiting check-in. When workplace spaces are having occupancy sensor and if the state of the space is unoccupied or Invalid, application sends push notification "Your reservation for Reservation for <space-name> has started. Either Check in to confirm your attendance or Release Booking to Cancel the space reservation". For more information, see Configure automatic check-in for reserved spaces.
Created	Reservation created date and time.
Updated	Reservation details updated date and time.

The **Related reserved items** will show the related workplace service items for a reservation.

20. Tap the additional information icon ( ) to perform the following:
    - Edit reservation: (Optional) If required, enter the following information:
      - Set the **Reservation subject** field.
      - Set the **On behalf of** field to the user for whom you want to make the reservation.
    - Share reservation
    - Cancel reservation
21. Tap **Submit**.
22. Click **Check in** to check in a reservation, if the workplace item that you've reserved requires check-in and check out.

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Note: You must check in within 30 minutes before the reservation start time. If the reservation isn't checked in within 30 minutes before the reservation start time, then the reservation is canceled. You receive an email about the cancellation. The Check in option is also available on the My Reservations page.

In case, if you have occupancy sensors installed in your workplace location, your reserved spaces are automatically checked in. You also receive a push notifications on Workplace Service Delivery for Mobile app when your reserved spaces are checked in automatically. If the workplace location or space state is Occupied, then, application automatically checks in the reservation. The reservation state moves to In progress state. A push notification is sent to Workplace Service Delivery for Mobile "Your reservation has started. You are automatically checked in based on the presence detected at the space. No further action is required." If the state of the space is Unoccupied or Invalid, application sends push notification "Your reservation for Reservation for <space-name> has started. Either Check in to confirm your attendance or Release Booking to Cancel the space reservation". For more information, see Configure automatic check-in for reserved spaces.

Result
The workplace reservation is confirmed.

What to do next
View your reservation status in the My reservations section. For more information, see Edit or cancel a reservation on Now Mobile app.

In the case of multi-day reservation, My reservations show the status of the reservation along with the number of days the multi-day reservation is spanning across.

If the workplace item that you've reserved requires check-in and check out, see Check in or check out a reservation.

To reserve a space using the QR code scanning option, see Scan the QR code to reserve a space.

Get directions to a workplace

View the directions from one workplace location to another using the Workplace Service Delivery for Mobile.

Before you begin
The Workplace Space Mapping application must be installed.

Note: The **Get Directions** option appears only if the workplace has a floor map defined and a map provider is selected as **Indoor Mapping** or **Mappedin** in Map Properties.

Native mobile Indoor Mapping capabilities are dependent on the Tokyo family release.

Role required: sn_wsd_core.workplace_user

About this task
Using the Workplace Service Delivery for Mobile, get directions for workplace from any of the following locations:

- From your current or any location to a colleague's workplace directly. The workplace location of your colleague is fetched from their ongoing reservation or from their workplace profile.
- From the My reservations page to get directions to a reserved workplace.

Important: If the colleague has privacy enabled, then, you cannot view any of their details.

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Procedure

1. On your mobile device, open the Now Mobile app.

2. **Note:** When using the Now Mobile app, the privacy setting will apply for all spaces in the reservation.

   Use workplace floor maps to find and reserve a space within Workplace Service Delivery For more information, see Make a reservation using the Now Mobile app.

3. To get direction to a colleague's workplace, perform the following steps:

   a. Type your colleague's name in the search bar.
   Use the search icon ( ) in the home screen.

   a. Select your colleague's profile.

   b. On the profile page, select **Get Directions**.

   Note: If the colleague's profile is set as private, then the **Get Directions** option is not displayed.

4. To get directions to a reserved workplace, perform the following steps:

   a. In the Workplace Reservations section, tap **My reservations**.
   You can also open the My reservations section by selecting the services icon ( ).

   b. Select the reservation for which you want to get the direction.

   c. **Optional:** For a multi-location reservation, do the following:

      i. Select the **Related reserved items** tab.

      ii. Select the reservation that was made on the location that you want to go to.

5. Select **Get directions** from the reservation record summary.
   Enable indoor positioning or location provisioning on you mobile location settings for automatically enabling the blue dot experience in wayfinding for Indoor Mapping. For more information, about configuring and enabling indoor positioning from one destination to another in a workplace, see Configure a custom Map provider.

6. Select your start and end location using the pointer if required, and close the map.
   The directions are displayed from the selected location to your colleague's workplace location. You can define directions from one building or floor to another building or floor. For example, get directions from Building A to Building B.

7. **Optional:** To get directions from one space to another, perform the following actions on the map.

   a. Select a space and click **Get directions to location**.

   b. Set the start and end points for wayfinding navigation routes.

   c. Select direction modes as **Default** or **Accessible**.

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(Optional) **Accessible** only shows workplace directions or routes near or adjacent an elevator.

The map displays the navigation path between the selected spaces.

8. **Optional:** To view the direction as steps, select **View steps**.
9. **Optional:** Integrate with IndoorAtlas and Apple to determine the current location of the employee and show the current location of the employee on the mobile app.

   (Optional) This option is available only when you are using Indoor Wayfinding with native screens. Search for a space (using AI search) and navigate to it.

   To enable indoor positioning, configure and customize your Indoor Mapping map provider properties. For more information, see Configure a custom Map provider.

   Note: Indoor positioning is available with Workplace Service Delivery Suite v1.7.

10. **Optional:** To automatically determine the start location in wayfinding, select **Start directions**.

    (Optional) This option is available only when you are using Indoor Wayfinding with native screens. Search for a space (using AI search) and navigate to it.

    Blue dot provides real-time location and navigation signs as you move in a given space.

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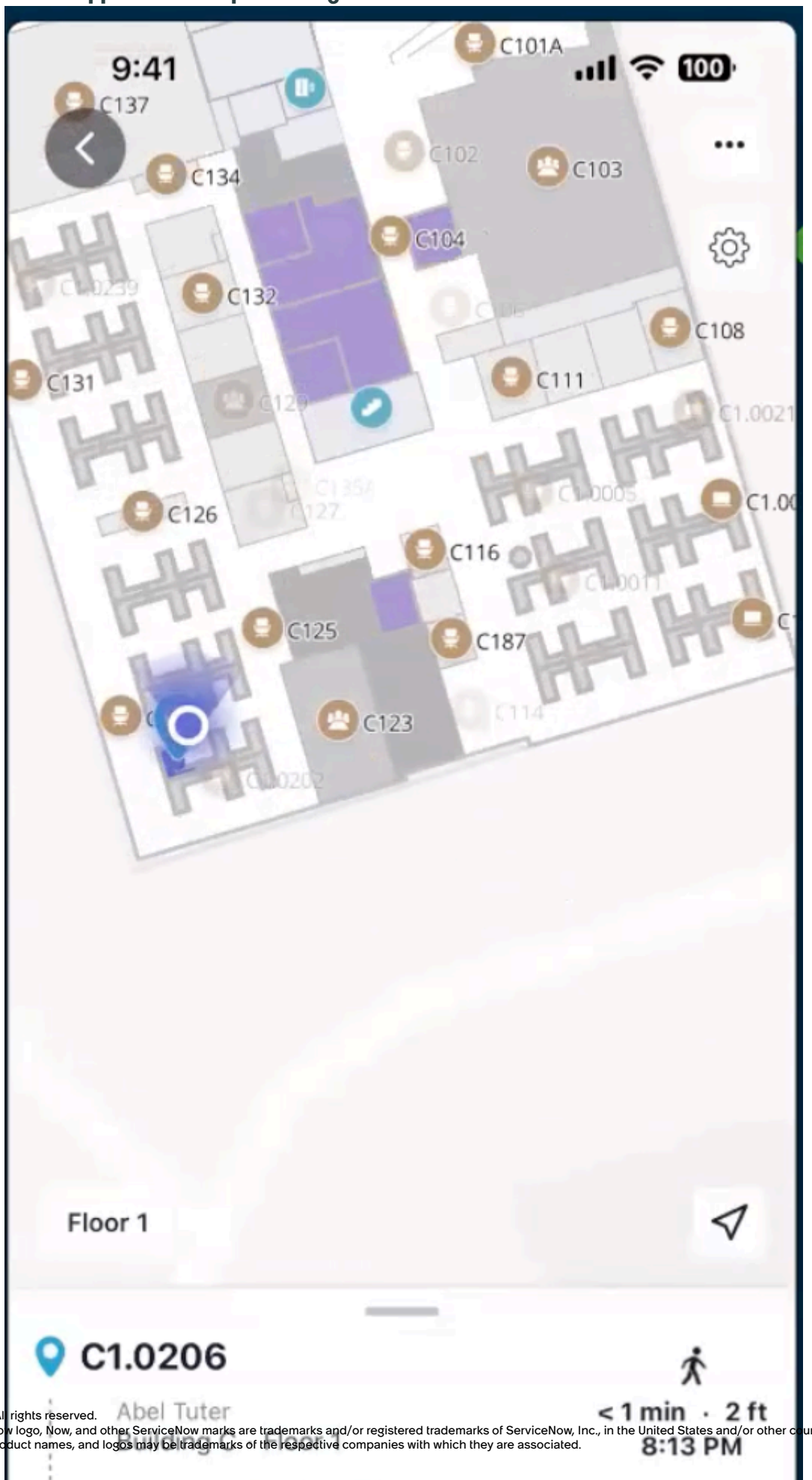
Mobile app with indoor positioning enabled



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11. **Optional:** Use the zoom options on the map to get a closer view of the spaces.
12. **Optional:** Sort the spaces in alphabetical order or by using the sort option in the card view.
13. **Optional:** Filter the space based on space types using the filter option in the card view.
14. **Optional:** To view a space on the floor, select the space from the card view or directly on the map.
    The map highlights the space.
15. **Optional:** To search for a user, type the user's name or their location.
    The user details are displayed based on their desk reservation if there are any or will be displayed based on their workplace profile location.
16. **Optional:** To submit a request related to a space, select **Raise a general inquiry**.
    For more information, see Raise help request for a workplace inquiry. The location details are pre-defined.

Result
The directions are displayed to the desired location.

Edit or cancel a reservation on Now Mobile app

Modify your upcoming reservation or cancel the reservation at any time using the Now Mobile app.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure
1. On your mobile device, open the Now Mobile app.
2. In the Workplace Reservations section, tap **My reservations**.

   You can also open the My reservations section by tapping the more options icon ( ) and selecting **My reservations**.
3. Select the reservation that you want to edit.

   Note: You can edit a reservation only if the option is enabled. The will appear if the editing option is available.

4. Tap **Edit reservation**.
5. Modify the field information.
   When you edit a reservation the Standard services and Reservable purposes fields are auto-filled.
   - In case of a single reservations, where the reservation is created for a single location, the fields are already set with the standard services and reservable purposes mapped to the location.
   - In case of multi-reservations, where the reservation is created for multiple locations, the fields are already set with the standard services and reservable purposes that are commonly available at all the locations.
6. **Optional:** Select **Toggle Map view** to review the available reservations using a map view instead of a list view.
   This toggle is available only if activated by your organization.
7. Select **Next**.
8. Select the locations you want to reserve.

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9. Tap **Submit**.
10. To cancel the reservation, click **Cancel**.
    You can also click the more options icon ()

    Note: The appearance of the icon depends on the type of device that you are using.

Result
The reservation is updated or canceled accordingly.

Check in or check out a reservation

Check in an upcoming reservation or check out an ending reservation using the Now Mobile app.

Before you begin
If you have occupancy sensors installed in your workplace location, your reserved spaces are automatically checked in. You also receive a push notifications on Workplace Service Delivery for Mobile app when your reserved spaces are checked in automatically. If the workplace location or space state is **Occupied**, then, application automatically checks in the reservation. The reservation state moves to In progress state. A push notification is sent to Workplace Service Delivery for Mobile "Your reservation has started. You are automatically checked in based on the presence detected at the space. No further action is required." If the state of the space is **Unoccupied** or **Invalid**, application sends push notification "Your reservation for Reservation for <space-name> has started. Either Check in to confirm your attendance or Release Booking to Cancel the space reservation". For more information, see Configure automatic check-in for reserved spaces.

Note: Reservation check-in and check-out is currently not supported for multi-location reservations (combining two or more reservations into one reservation). Check-in or check-out of reservations with multiple locations for the same date and time and with the same reservation owner is not allowed by the application. In case of group reservations, each space is assigned to a different employee, check-in for group reservations is also not allowed in bulk. You have to check-in a reservation one at a time.

Role required: sn_wsd_core.workplace_user

Procedure
1. On your mobile device, open the Now Mobile app.
2. In the Workplace Reservations section, tap **My reservations**.
   You can also open the My reservations section by selecting the services icon ().
3. Select the reservation that you want to check in or check out.
4. To check in or check out, do one of the following:
   - To check in the reservation, tap **Check in reservation**.
   - To check out the reservation, tap **Checkout reservation**.

     Note: You can check out a reservation only after you check in. After you check out the reservation, the status of the reservation is shown as **Complete**.

Result
The reservation is checked in or checked out accordingly.

Share your reservation details with other users

Share the details of your reservation with a colleague. An email notification is sent to the colleague with the details. The colleague can also make a reservation near to your workplace.

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Before you begin
Role required: sn_wsd_core.workplace_user

Procedure

1. On your mobile device, open the Now Mobile app.
2. In the Workplace Reservations section, tap **My reservations**.
   You can also open the My reservations section by selecting the services icon ( ).
3. Select the reservation that you want to share.
4. Tap the more options and select the **Share icon**.
   icon ( )

   The appearance of the icon depends on the type of device that you are using.
5. In the **Send reservation details to** field, select one or more users with whom you want to share the reservation details.
   Close the page after selecting the users.
6. In the **Add note** field, add a note that is sent along with the reservation.
7. Tap **Send**.

Result
After the reservation is confirmed, the reservation details are shared with the selected users.

Scan the QR code to reserve a space

Scan the QR code of a workplace and quickly reserve a space using the Now Mobile app.

Before you begin
Role required: sn_wsd_core.workplace_user

Procedure

1. Log in to the ServiceNow® mobile app.
   The Mobile home page is displayed.
2. You can also select a space from **My favorites** and reserve a space.
3. Select a space.
4. Tap **See my reservations** to see your existing reservations for a selected space.
   Select a space from the list of spaces to view the Reservation Information screen. For more information about the Reservation Information screen, see Make a reservation using the Now Mobile app.
5. Tap **Reserve** to reserve a location for a selected space.
6. Space details screen is displayed with the quick reservation option for a day.
7. Perform the following steps:
   a. Reserve available time slot: Select a time slot for your reservation.
      - Suggestion for available reservation time slots is displayed in horizontal blocks with a scroll bar.
      - To view the time slots in a vertical list, select **View all**.

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The time slot duration is dependent on the **Max duration**and **Min duration** values configured by your administrator in the Reservable Module configuration. For more information, see Configure a reservable module.

The time displayed in the time slot considers the Start time of the working day (sn_wsd_rsv.day_start) and End time of the working day (sn_wsd_rsv.day_end) properties set by your administrator. If office hours are from 9 AM to 5 PM, then all the available reservation slots between 9 to 5 are divided into 2-hour intervals (based on the values that you've provided for Max and Min duration). However, if there are any existing reservations, then these aren't displayed. Only available time slots for a reservation are displayed. If the available slot for a reservation is from 9 AM to 12 PM, and the maximum duration for a meeting is two hours, then 9–11 is the first time slot and 11–12 is the next time slot.

For example, If the Max duration is two hours and the Min duration is 30 minutes. The office timings are from 9 AM to 5 PM, and a space (Building A, Floor 3, Meeting room 1) has two existing reservations. The first reservation is from 9 AM to 1.45 PM and another reservation is from 2 PM to 3 PM. Then, 3 PM to 5 PM can be the next time slot.

Note: QR code reservation is not supported for **All day** reservation. Multi-day and recurring reservation is also not supported for QR code reservations.

b. Check availability: Manually select a Start date and time and End date and time for your reservation. If you try to select a past date or select any future dates, tThe time is reset to the current date. Time durations can be changed.

c. The Schedule view shows the time slot in vertical bars. Select the chevron icon (›) to move forward or select the icon (‹) to go back and check the reservation time slot availability for a day.

The selected time slot (Step 9a) is highlighted in green on the scheduled view. Existing reservations and unavailable time slots show shaded blocks. Vertical lines indicate a 1-hour duration while the dotted lines indicate a 30-minute duration.

d. If the selected time slot isn't available or if the selected space is not available, a validation message is shown. Users can use the **Nearby spaces** option to check for available spaces or check for next available time slot. **Nearby spaces** section shows list of spaces that are nearby the scanned space and are available for reservation.

e. Select **View details** to see the space details.

8. Tap **Reserve** to make your reservation.
Check in your reservation by the start time and check-out the reservation after it ends. Open your reservation to check in directly using the My Reservations option on the home page.

9. Review the reservation summary details.

10. Tap **Check in** to check in your reservation.
For more information, see Check in or check out a reservation.

11. Select the **Actions** drop-down options to:

- Change reservation details
- Cancel reservation
- Share reservation

12. Optional: To submit a general inquiry or raise a complaint request, select **Submit a request**.

Note: This option appears only if the Workplace Case Management plugin is installed.

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a. In the **What can we help you with?** field, enter your inquiry details.

b. Tap **Submit**.
A case is submitted for the inquiry.

c. After reviewing the inquiry details, tap **Close**.

13. To view and change your reservation details, select **See my reservation**.
This option appears only if you have a reservation on this space.

a. Select the more options icon.
()

The availability of the icon depends on the type of device that you're using.

b. To edit the reservation, tap **Edit reservation**.

Work with Location Directory for Now Mobile app

Work with Map view and Card view on the Location directory. Search for employees, locations, and neighborhoods. Filter spaces based on reservation status, occupancy status, and space types. Get directions to a workplace location or collaborators or a workplace profile user using floor maps. Reserve a space or raise a workplace service request or an issue for a location.

Before you begin

Make sure that the following applications are configured:

- Workplace Core
- Indoor Mapping
- Workplace Reservation Management (Optional)

  Filter and display reservation status for a selected location on the Location directory.
- Workplace Connectors (Optional)

  Filter and display occupancy status for a selected location on the Location directory.
- Workplace Space Mapping

Note: Confirm that the map properties for the Location directory are configured by your administrator. Map properties for the Location directory provide options to:

- Filter spaces based on the reservation and occupancy states.
- Automatically refresh reservation and occupancy data on the Location directory.
- Control the Map display setting options to display permanent and private workplace profile users.
- Show or hide neighborhoods for a location.

For more information, see Configure map properties for Location directory

Role required: sn_wsd_core.workplace_user (workplace_user)

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Procedure

1. Log in to the Now Mobile app and select the add (+) option on the home page.

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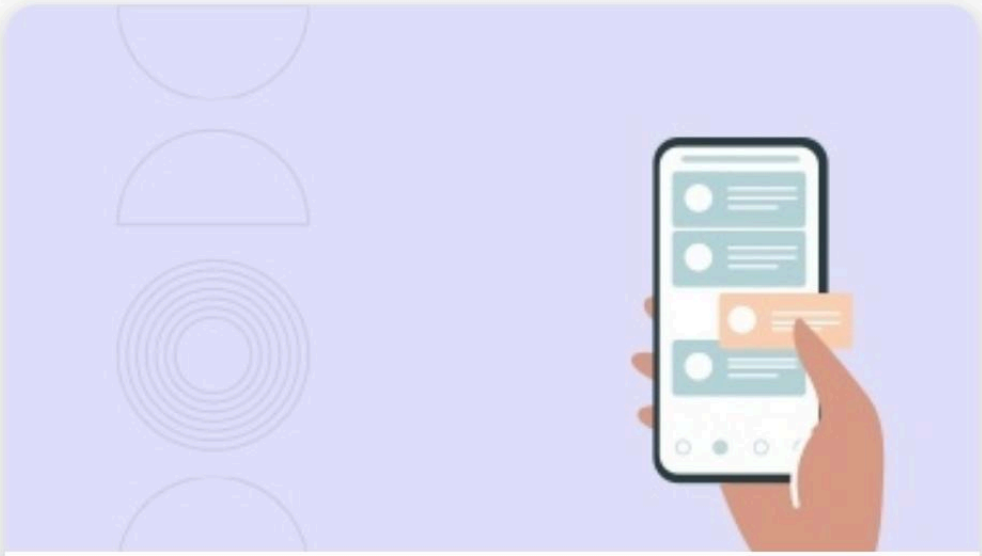

Welcome to Mobile!

Complete tasks, track requests, and discover powerful workplace support at your fingertips.

Quick links

Request IT assistance

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2. Tap to select **View Location directory**.

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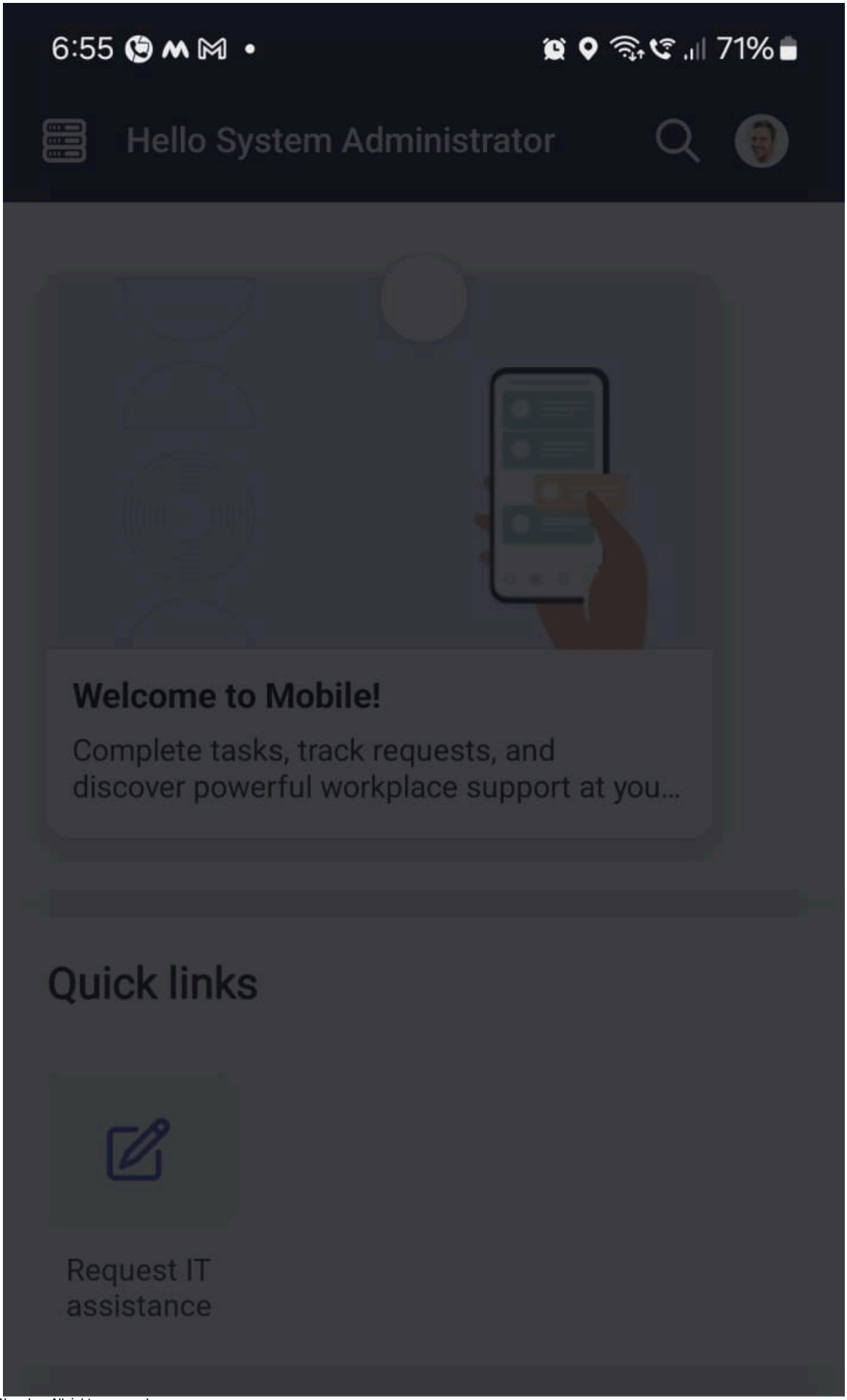

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By default, the Map view is displayed. The Location directory home page is displayed on the World map.

Note: If a location doesn't have indoor Maps, the Location directory opens in the Card view.

3. Tap to select the **Select Campus** tab.

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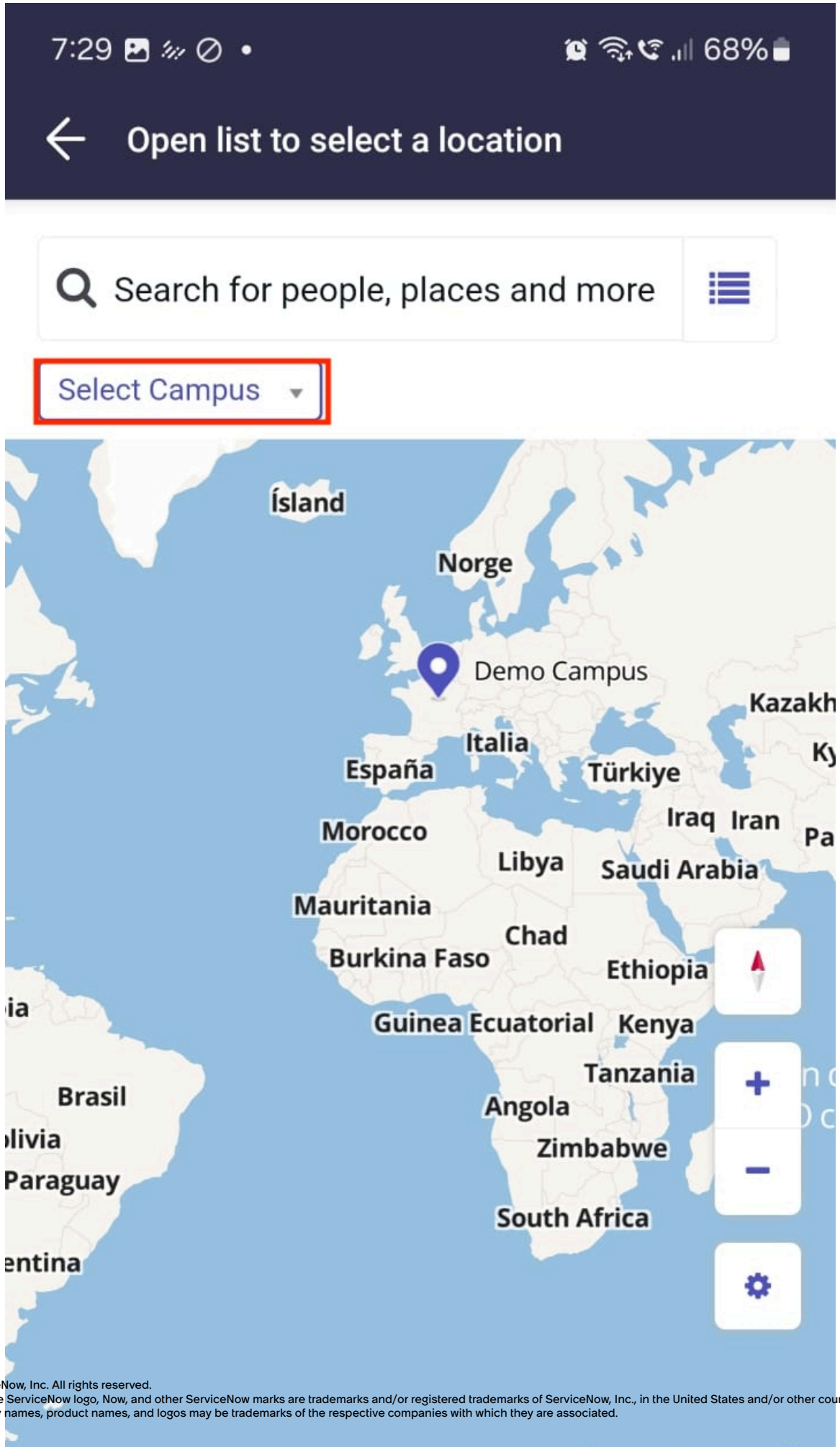

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You can also search for a campus or zoom in to select a campus or location.

a. On the search bar, search for a campus or location.

b. Use the zoom in ( ) controls on the map to bring into focus the location pin marker icon () to select a campus.

c. Employees can also pinch to zoom in the location.

You can also swipe your mobile screen and move around the map to select a location.

4. When you select a campus, the **Select Building** tab is enabled and the buildings in a campus are displayed.

For example, Demo campus with Building A and Building B.

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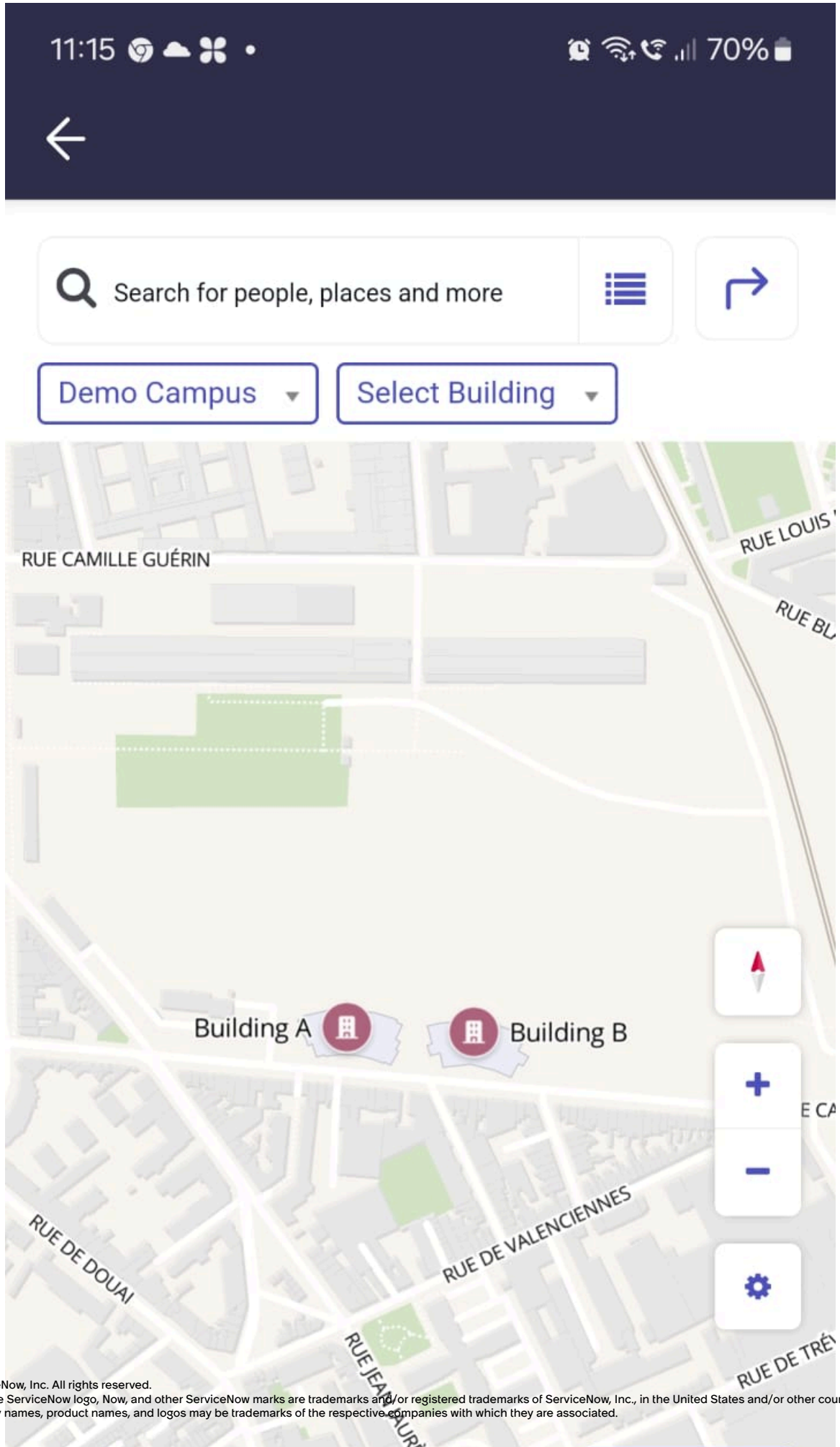

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5. Tap on the **Select Building** tab and select a building.
   When you select a building, the **Select Floor** and the **Filters** menu options are enabled.

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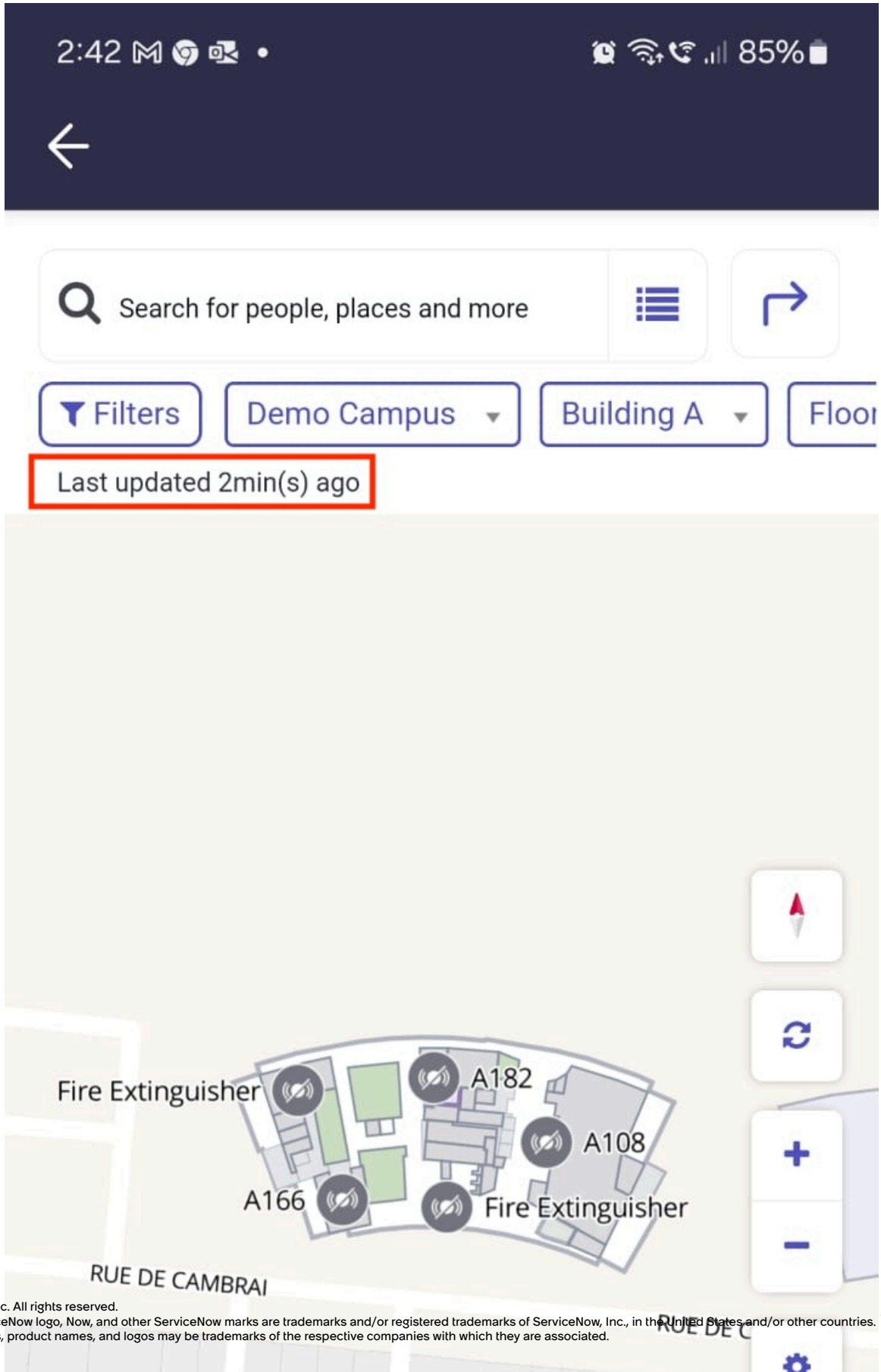
Note: The **Last updated <time interval>** label is shown on the map after selecting a building. For example, **Last updated 1 min ago**. The map is automatically refreshed if your administrator has enabled the map property (**Auto Refresh time interval (in mins) for showing Reservation and/or Occupancy information on the Location directory**). This property fetches the latest reservation and occupancy data on the map.



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6. Tap **Select Floor** to select a floor.

   You can also search and select floor from the list.

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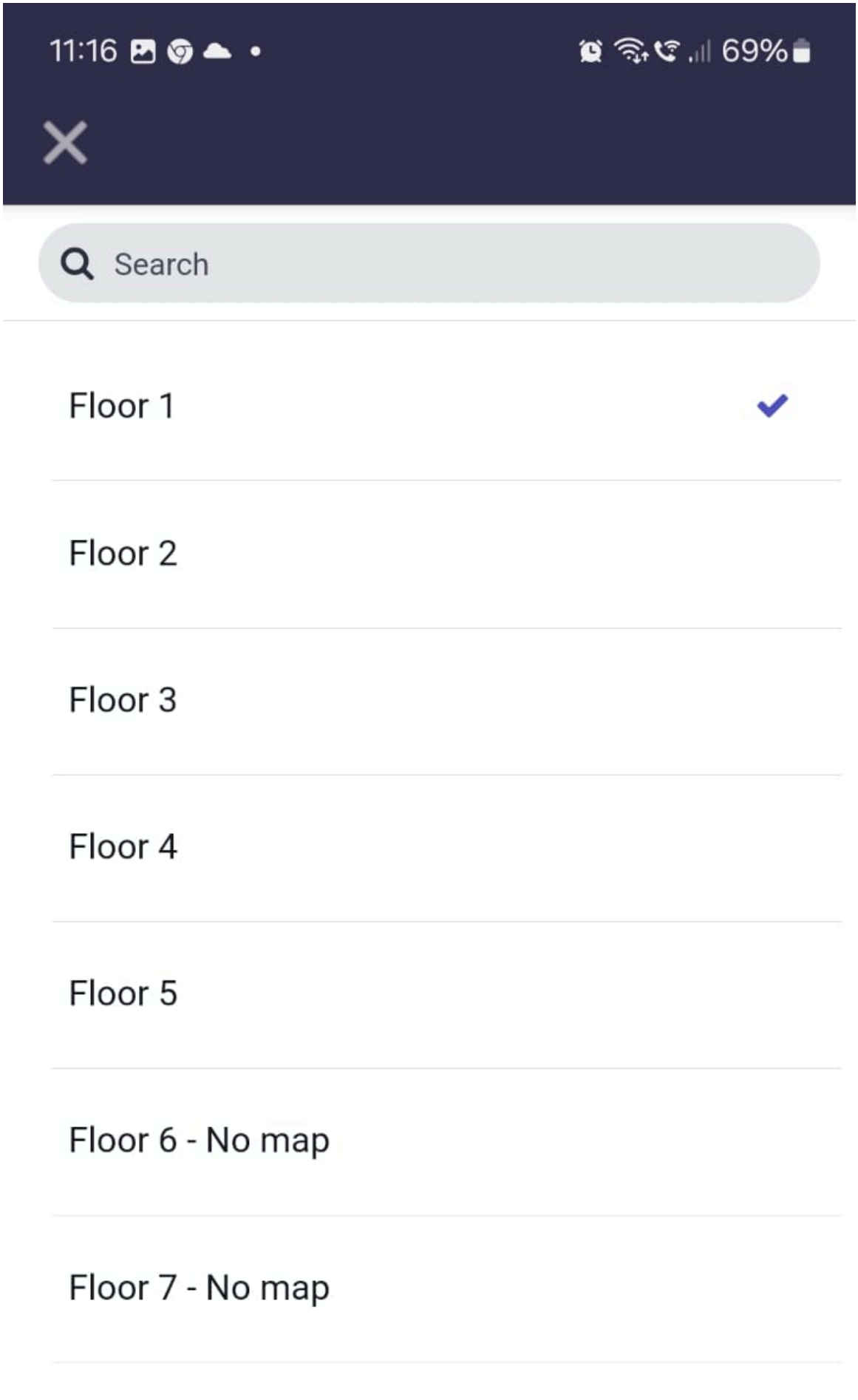

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7. Select **Filters**.
   Filter spaces or locations on the map by reservation states, occupancy states, and space types (rooms, gym, elevator, and so on).

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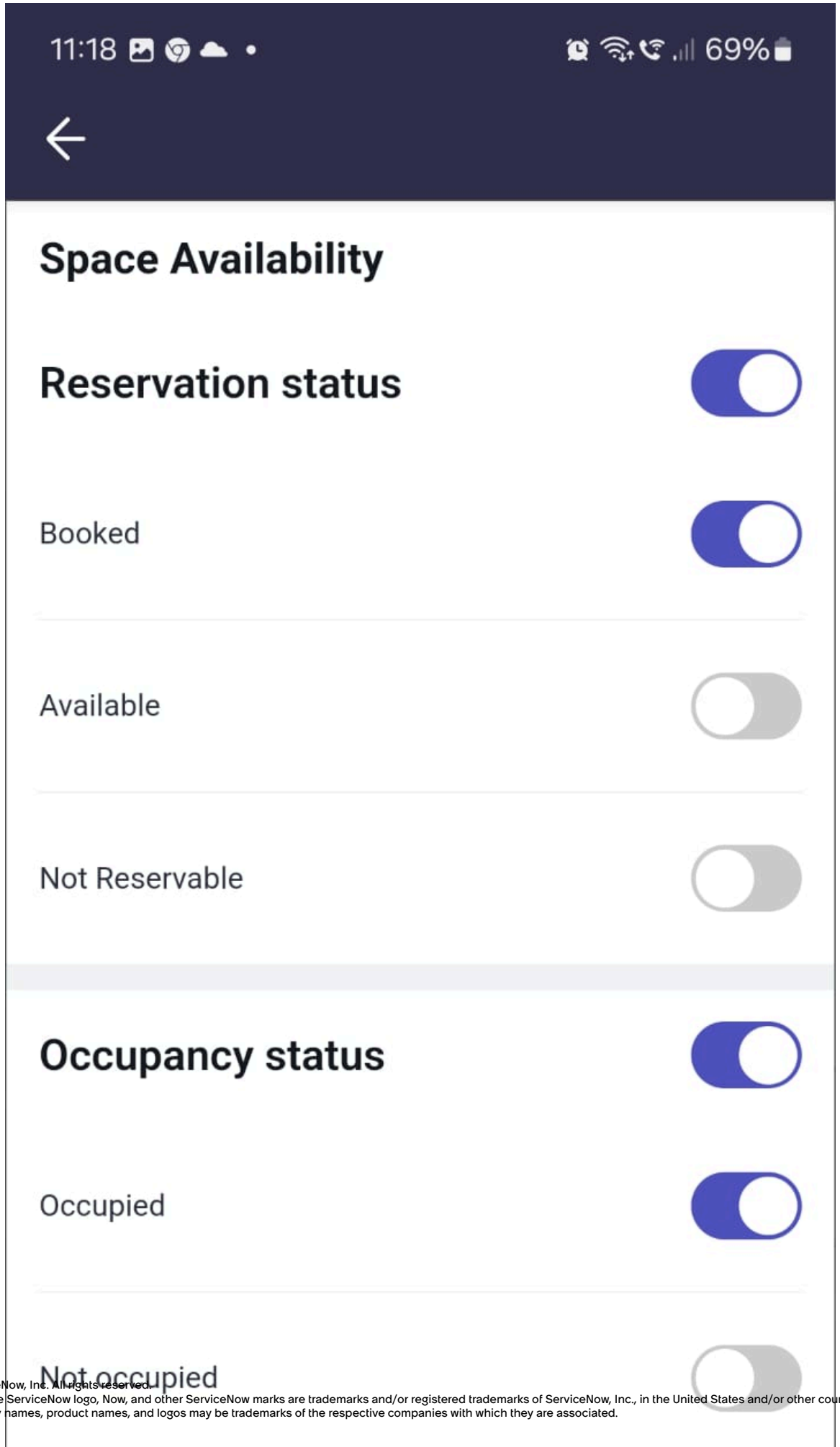

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Spaces are filtered and the ones that match the filter conditions are displayed on the map. Spaces that don't fulfill the filter conditions or that don't have a filter applied are shown in white (map polygon color).

- When both reservation and occupancy filters are applied then spaces fulfilling both these conditions are shown.
- When only reservation or occupancy filters are applied then only reservation or occupancy states are displayed.

Note: The option to show **Filters** option is configured by your administrator using a map property [sn_wsd_space_map.show_rsv_occ_data_loc_dir]. Filters can be applied at a floor or space level for both Card view and Map view.

a. Tap to select the **Reservation status** check box to display reservation status and icons on the map.
For more information about Legends, see Step 12.

b. Select and filter spaces based on reservation states.

For example, you can select any of the following reservation states to display only the selected filter conditions on the map:

- Booked
- Available
- Not Reservable
- Currently booked

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a. Tap to select the **Occupancy status** check box.

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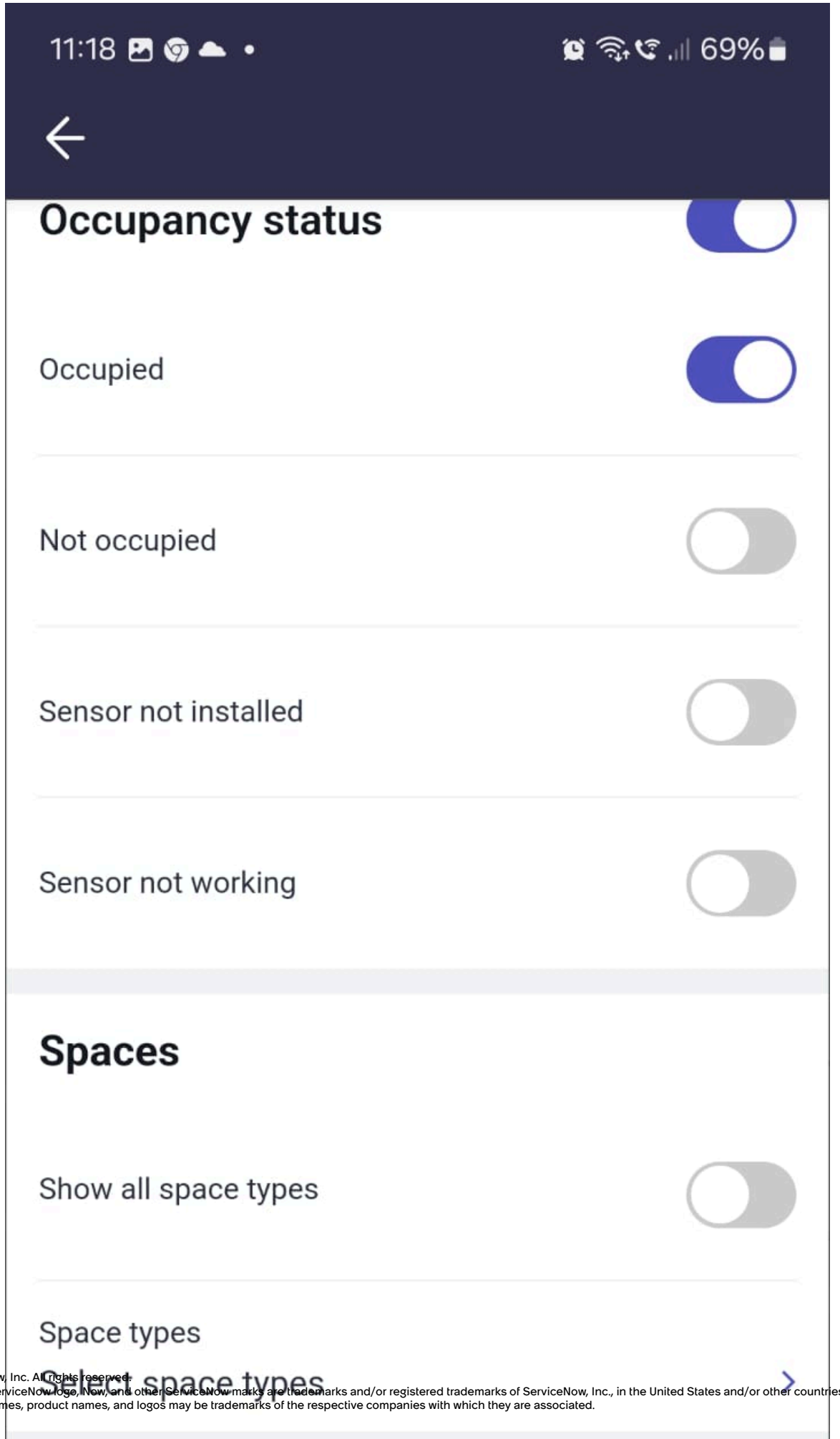

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Occupancy status and related icons are displayed on the map. For more information about Legends, see Step 12.

b. Filter spaces by occupancy states.

For example, select any of the following occupancy states to display on the map:

- Occupied
- Not Occupied
- Sensor not installed
- Sensor not working

- Tap to select **Spaces** > **Show all space types**.
- Filter selected space types on the map. For example, the following space types can be selected:
  - Rooms
  - Gym
  - Cafe
  - Phone booth
  - Workspace/Desk
  - Restroom-Men
  - Restroom-Women
  - Miscellaneous
  - Elevator

  Note: Indoor Mapping places types are shown as Spaces types on the Location directory.

- Select **Apply** to apply your changes on the map.
- Tap and select **Clear** to remove filters.

8. Tap to select a space on the map to view the space card details panel.

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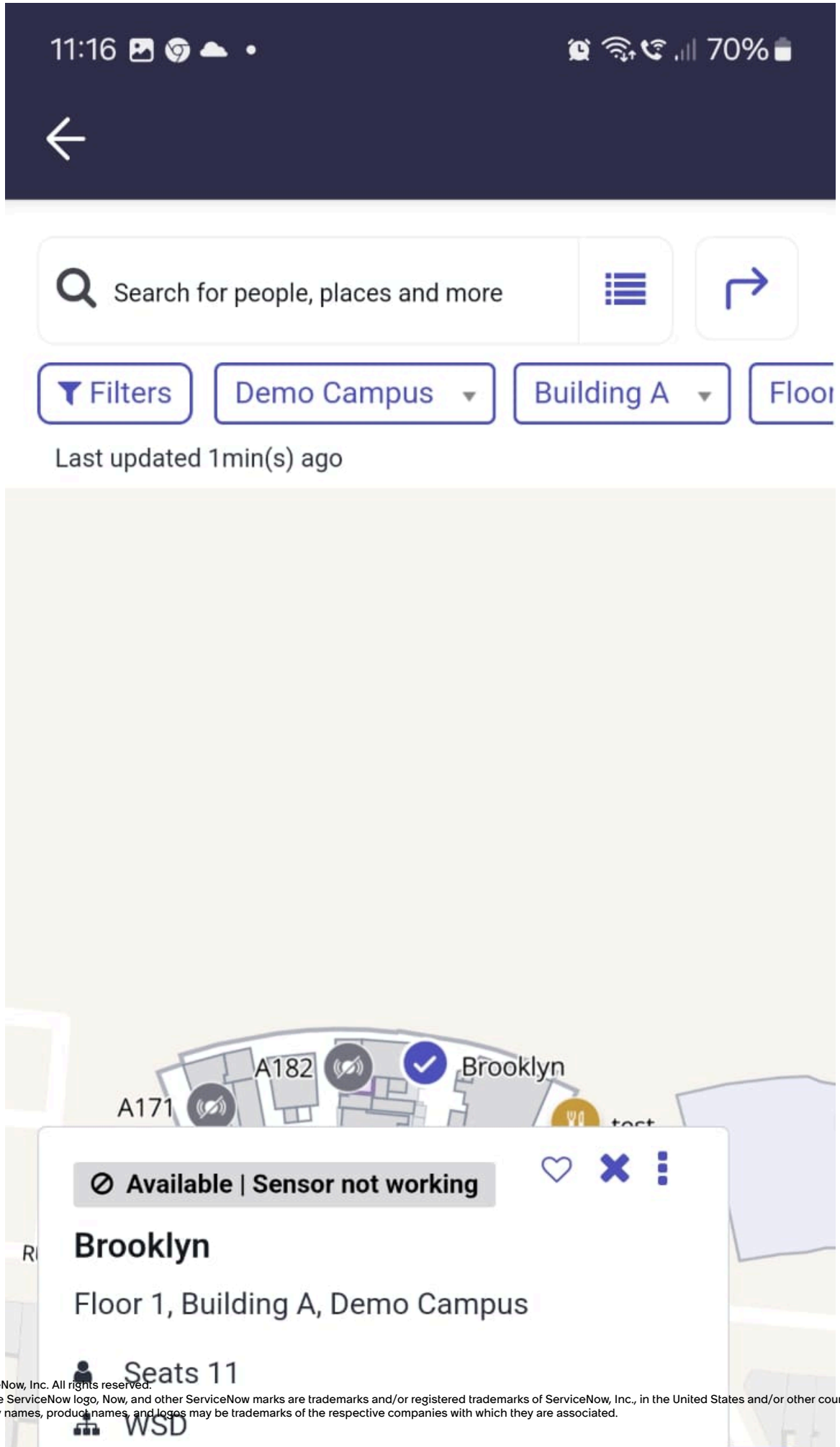

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Space card details show labels or tags for space occupancy and reservation states. For example, **Available**, **currently booked**, or **Sensor not working**.

a. Select **Reserve** to reserve an available space.

For example, tags for reservation and occupancy status are shown in the space card details panel (**Available | Sensor not working**).

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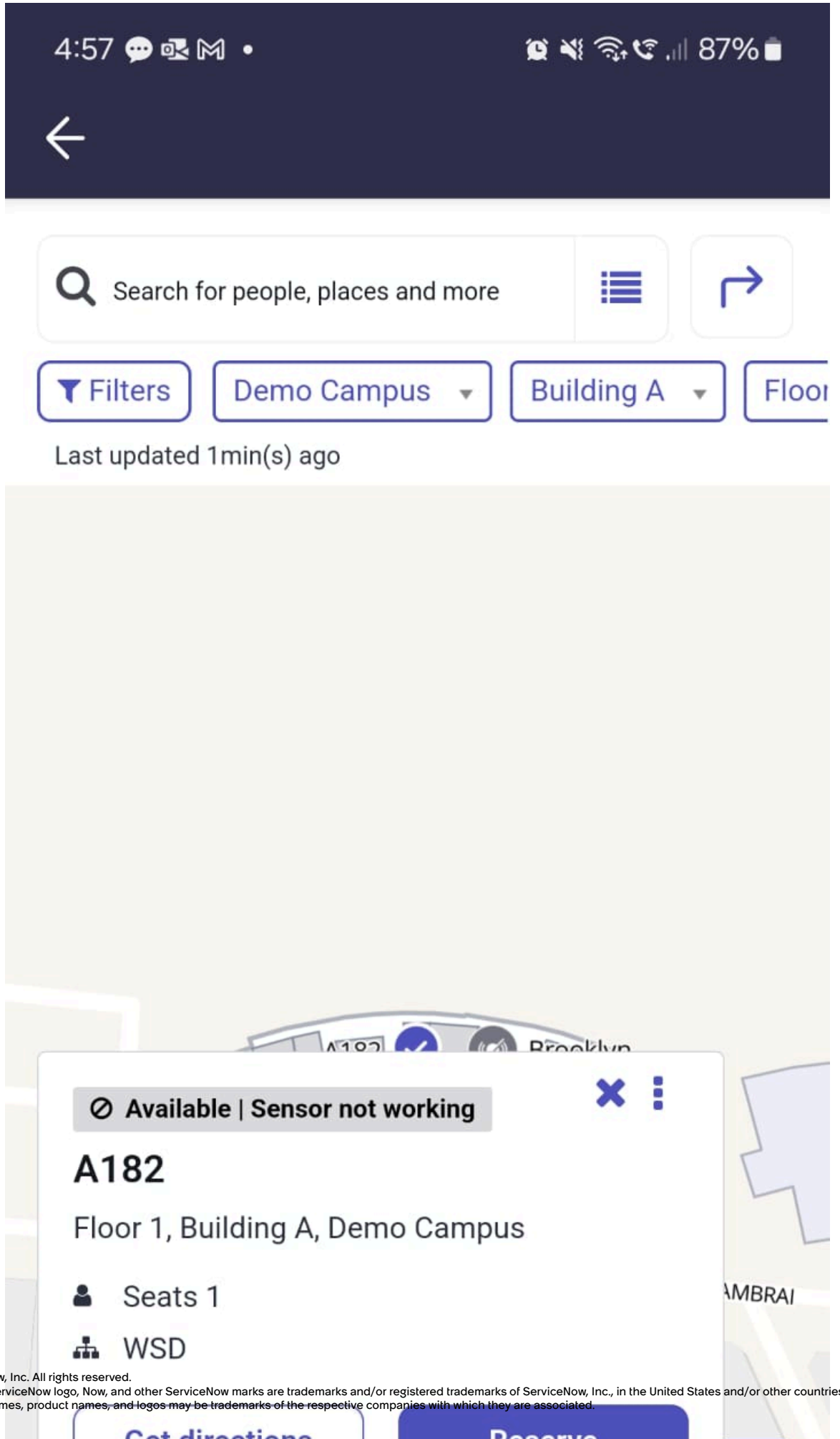

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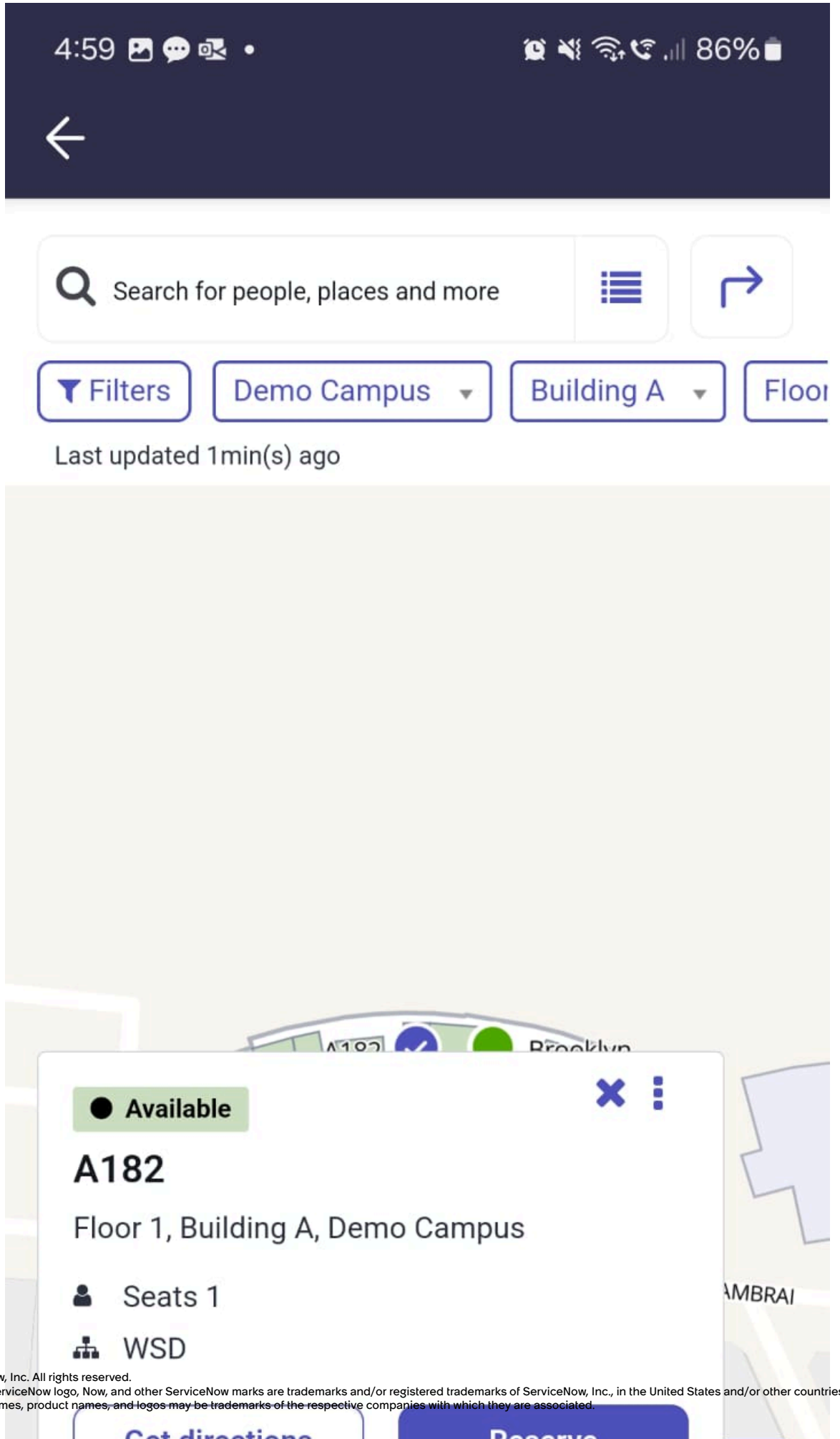

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b. Select **Get Directions** for wayfinding.
This option enables employees to navigate to a meeting room or to a co-worker's desk and collaborate effectively.

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You can find directions from a selected space to another space in the same building or to another building or to a different floor in another building.

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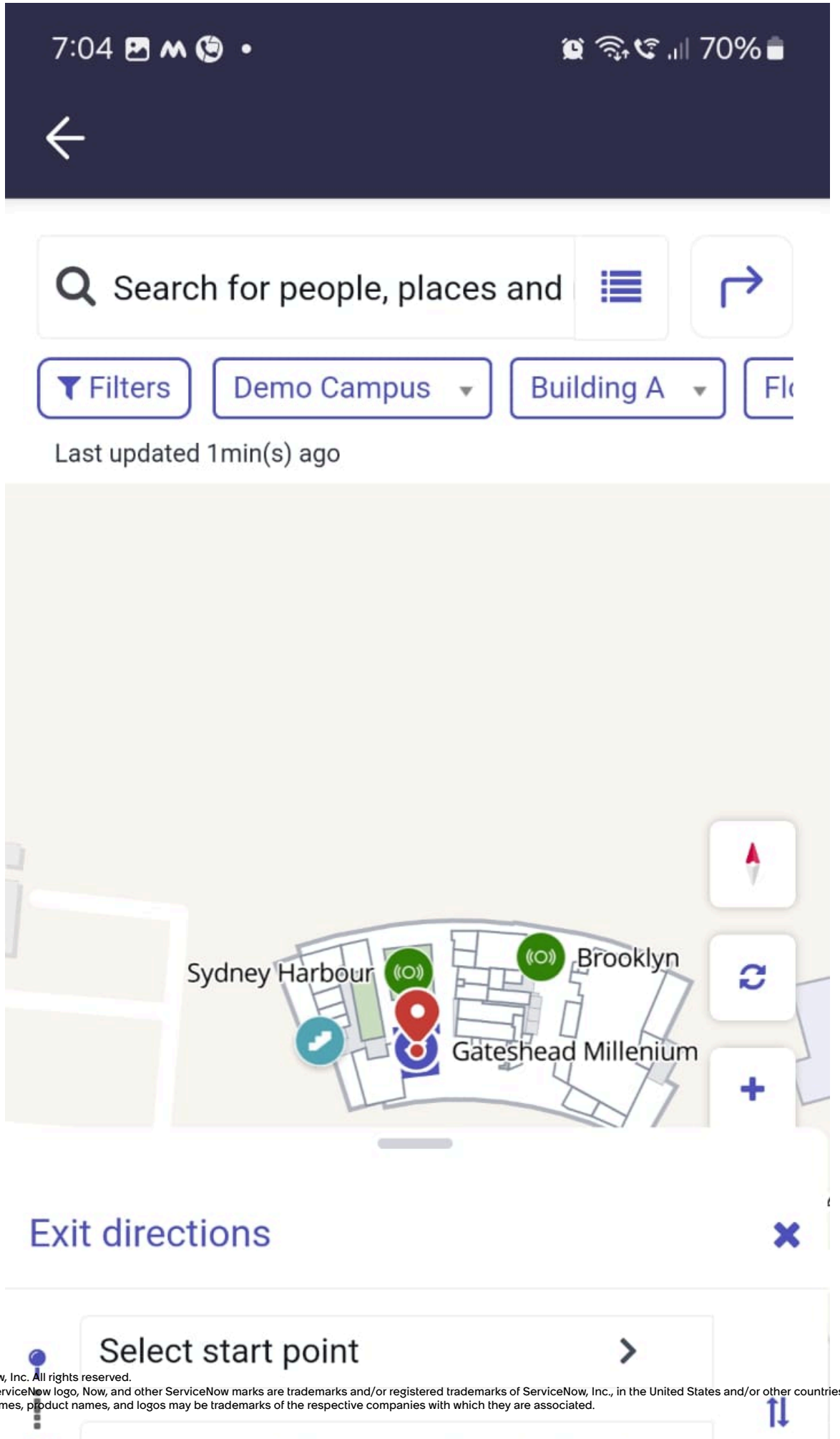

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a. Tap and enter the starting route for wayfinding in the **Select start point**.

You can enter a workplace profile name, location, desk, or meeting room.

Note: When you select a location, workplace profile or desk that is not configured by your administrator for you to use, a message is displayed `Sorry this location isn't configured to be shown on the map`.

b. Tap and enter the destination for the wayfinding route in **Select End Point**.

The location is selected by default. You can change it as required to another building, space, or to a workplace profile.

c. Select **Default**or **Accessible**.

Accessible routes or pathways are near or adjacent to an elevator.

The directions are displayed on the map. You can define directions from one building or floor to another building or floor. For example, get directions from Building A to Building B.

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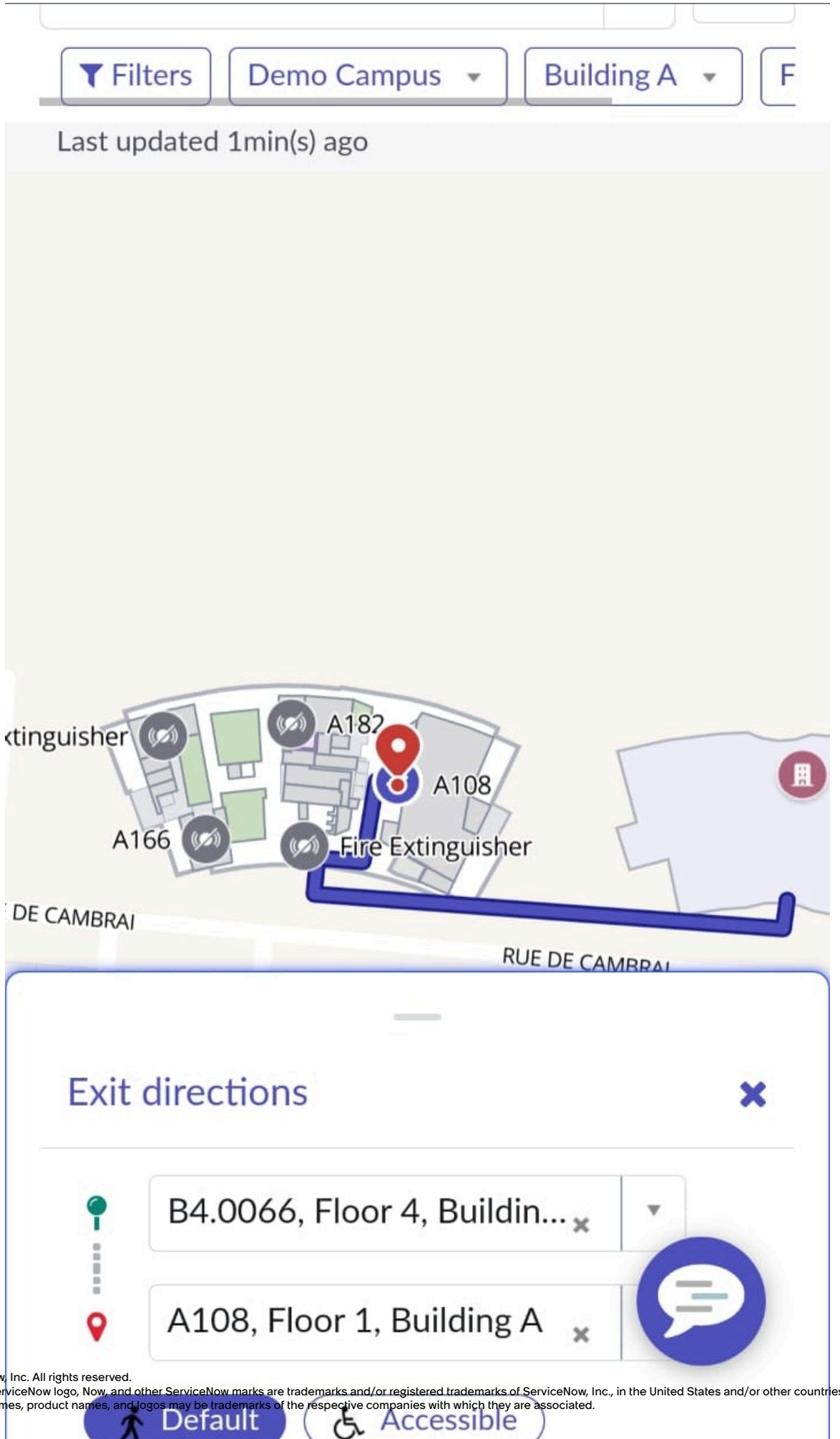

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Exit directions

DE8-A2.0019 - Abel Tuter

C60-A5.0547 - Abraham Linc...

Default

Accessible

< 2 Min 52 meters

Amenities | Space Availability | Neighborhood

- Desk
- Elevator
- Fire extinguisher
- Meeting room

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If you try to provide a route or location that is not configured by your administrator, an error message is shown `Sorry! This location is not configured to be shown on the map`.

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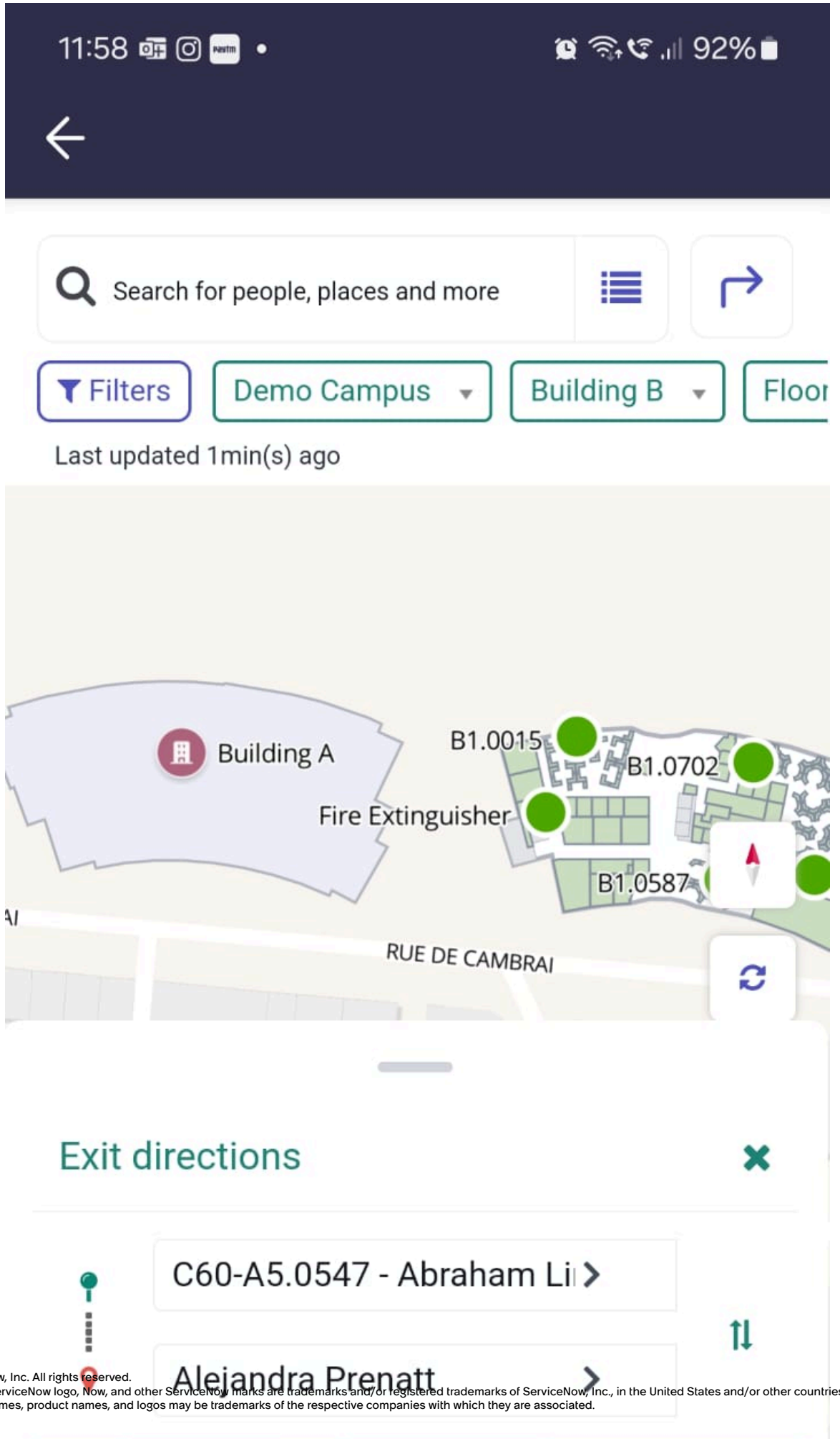

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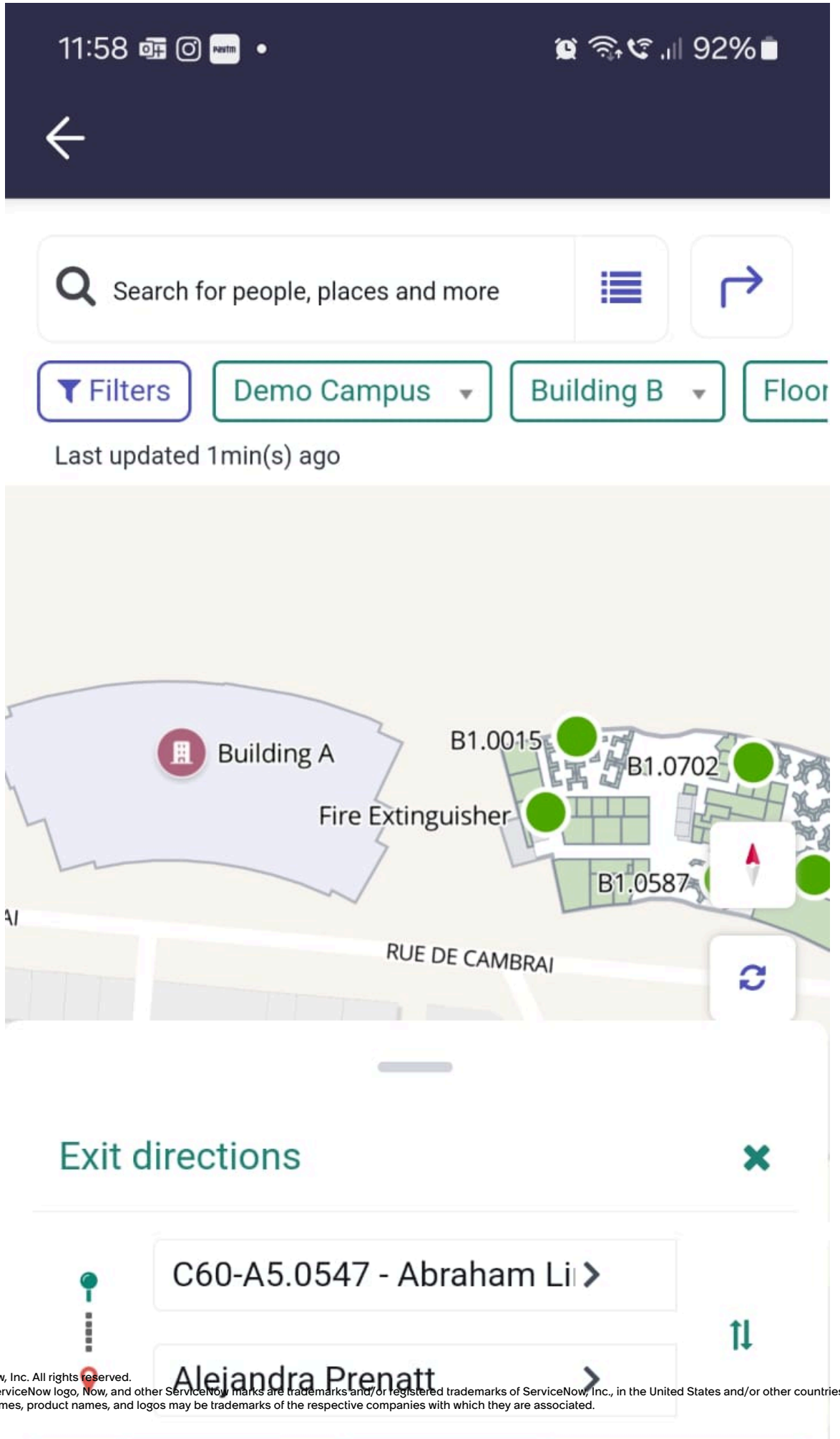

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9. From the Space details card panel, tap and select the More actions icon (⋮) and select any of the following options as required:
   - Copy URL: Option to copy the space browser link. The Copy URL link, when selected, copies the URL link to the clipboard. The space location link can be shared with your team members and colleagues.
   - Raise an issue: Option to raise a workplace service request.



10. Select the Map display settings icon ( ) to enable or disable the following on the map:.
    - Don't display employee names: Option to hide employee workplace profile names on the map.
    - Display permanent seating assignment: Option to show workplace profile users with a permanent seat allocation.
    - Layers: Option to select and display layers on the map for a selected location. Tap and select **Show all layers** to show all available layers on the map.
    - Select **Apply** to apply the changes made to map display settings.
11. Tap and select the swipeable drawer on the navigation bar.

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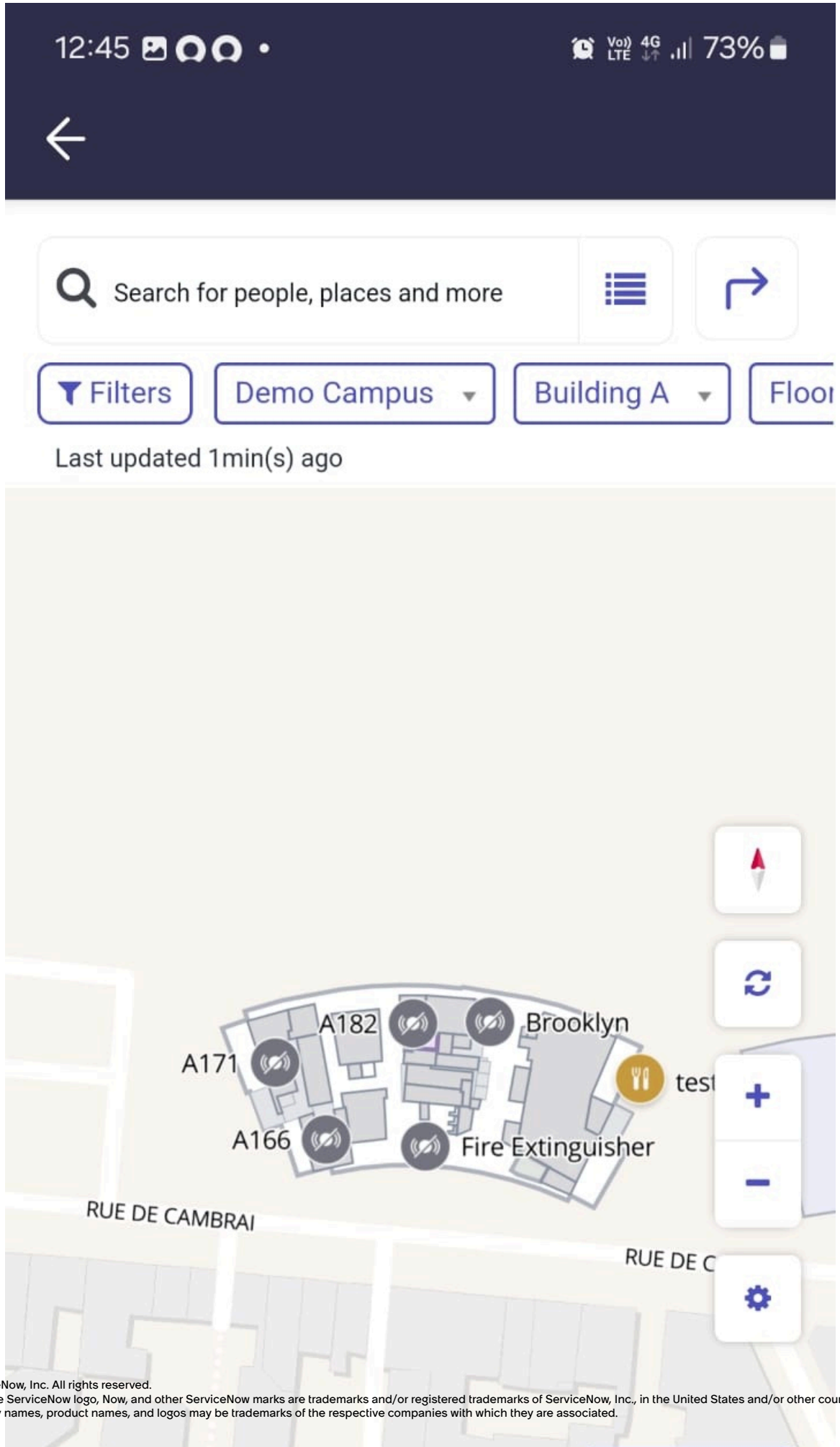

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Swipe horizontally or sideways to view map legends for workplace amenities, space availability, and neighborhood.

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- Amenities: Option to view the available space types for a selected location.

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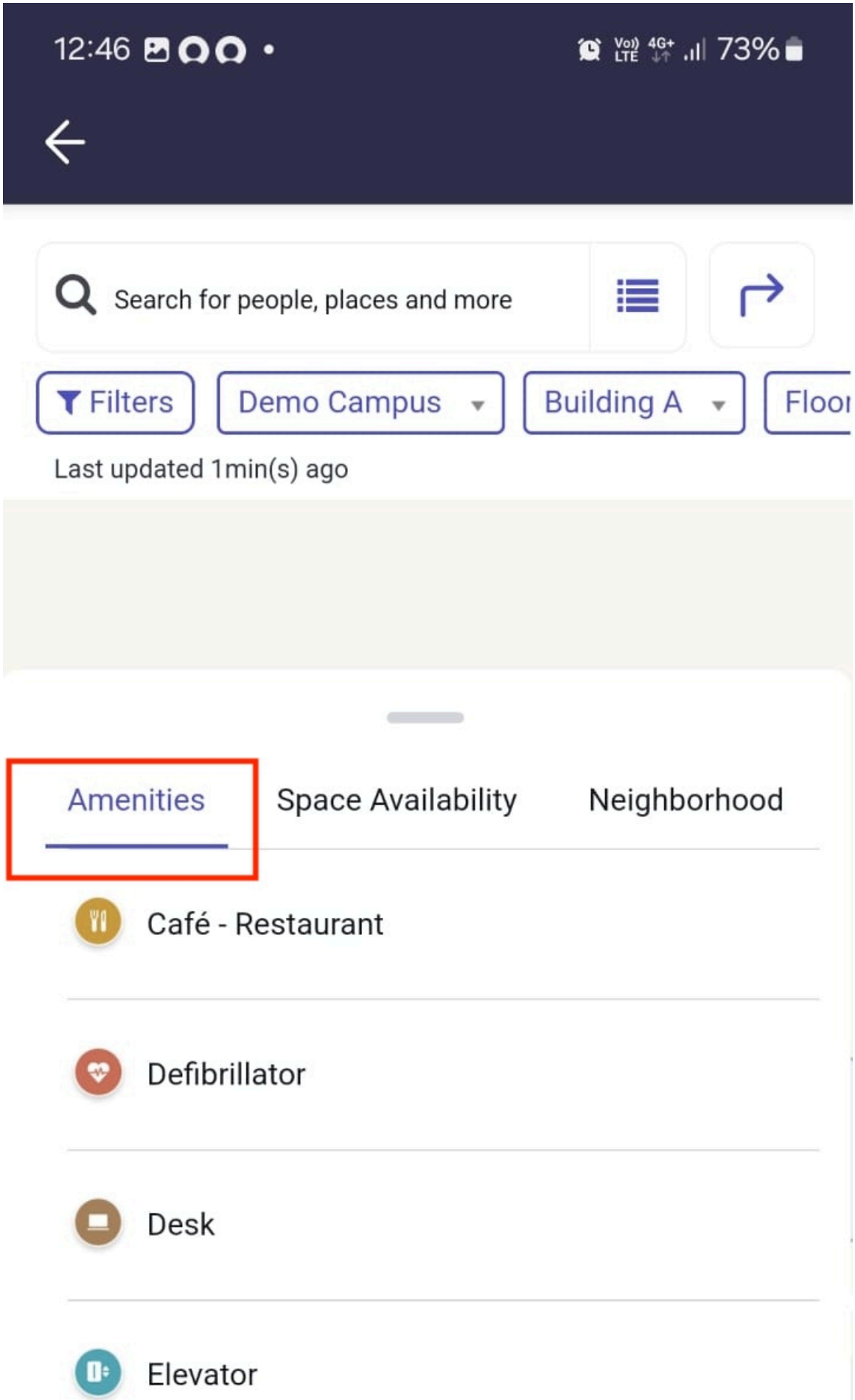

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- Space Availability: Option to view the map legends for space occupancy and reservation status.

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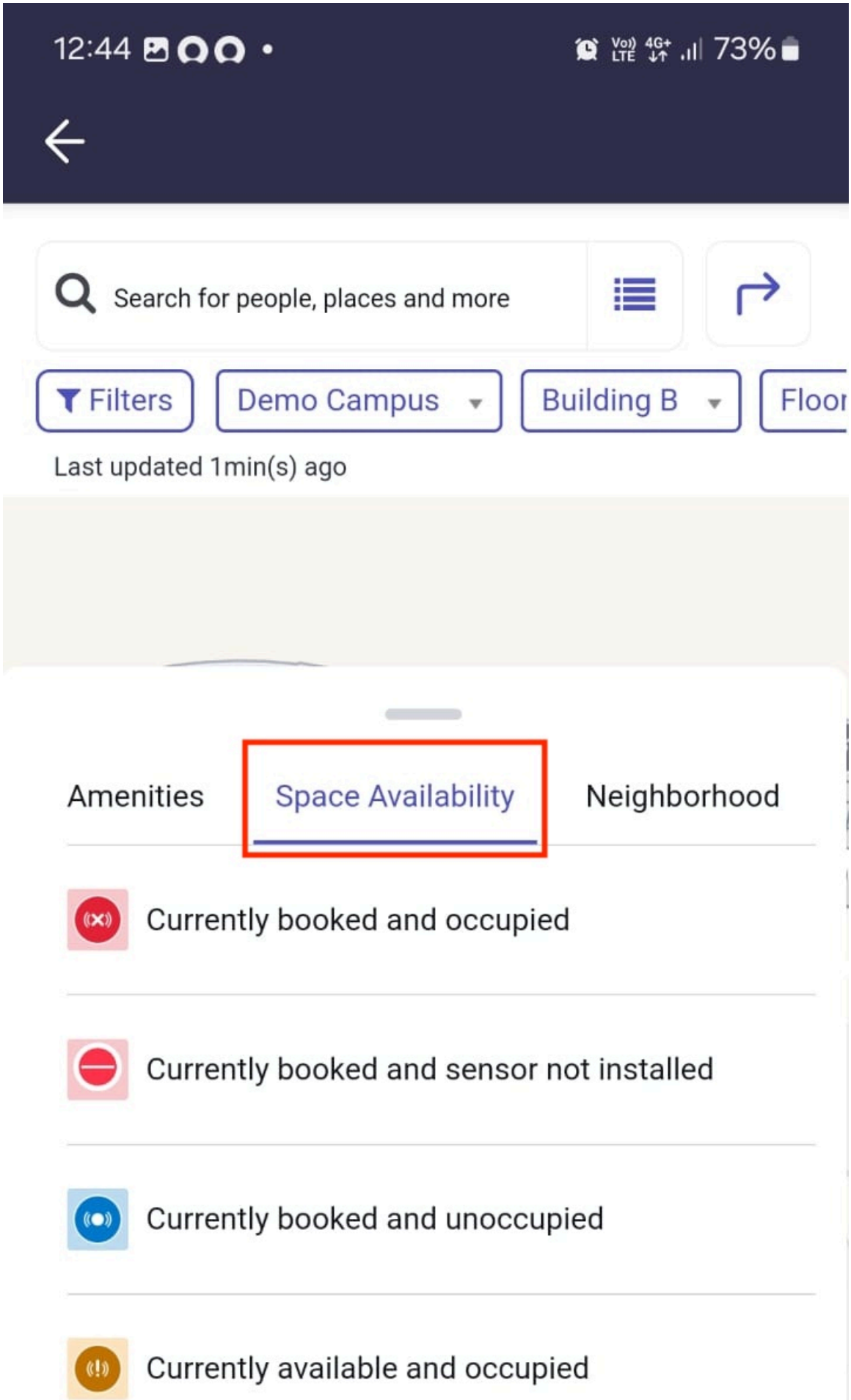

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- Neighborhood: Option to enable and view designated neighborhoods for a selected location.

  Note: Option to show or hide a neighborhood for a location is dependent on a map property configuration [sn_wsd_space_map.display_neighborhood_on_the_map] set by your administrator. For more information, see Configure map properties for Location directory.

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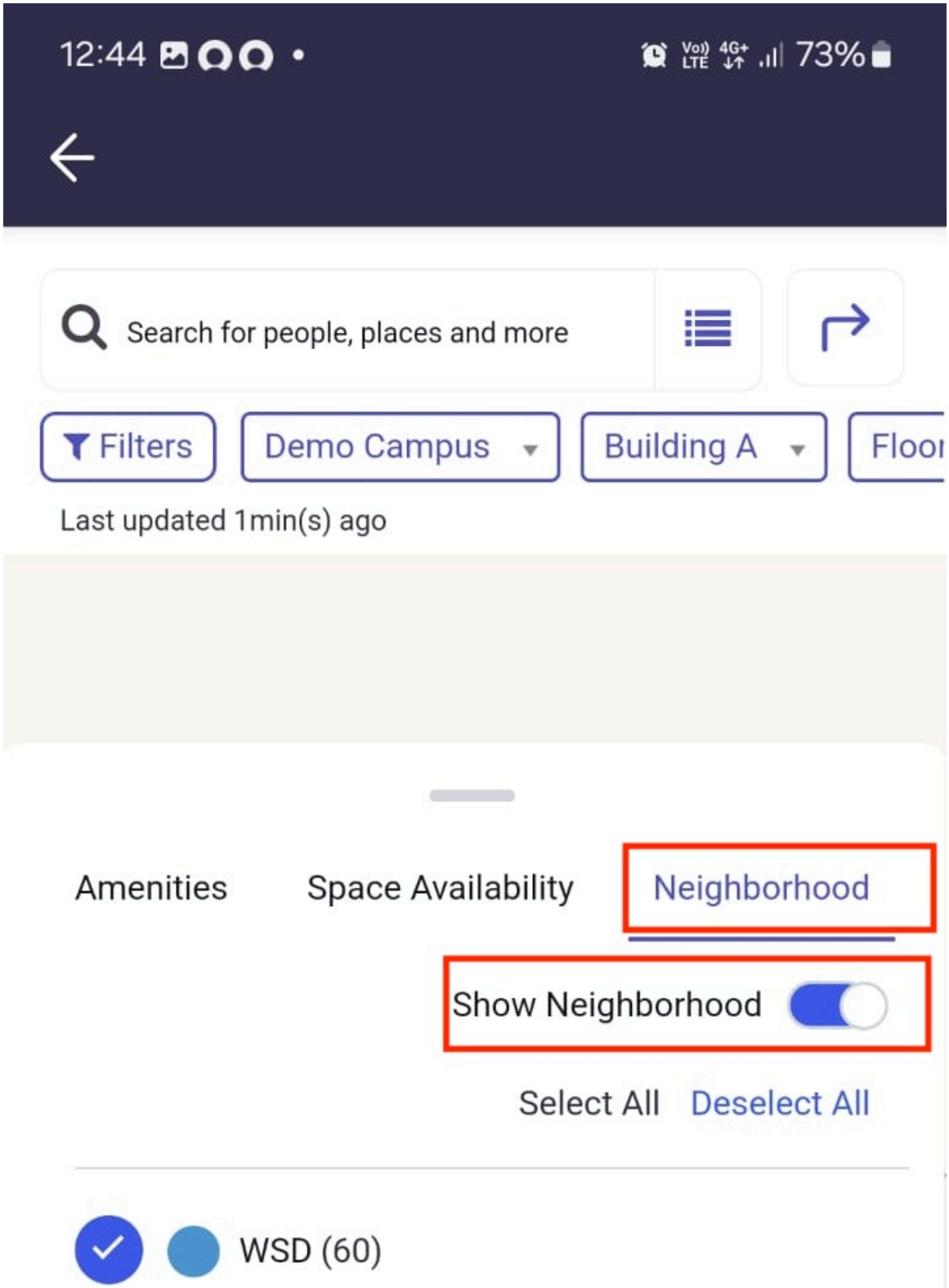

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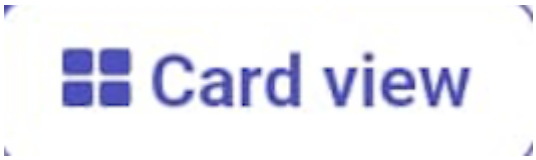
Select the Neighborhood toggle on and toggle off button to show or hide the neighborhoods on the map.

- Neighborhoods are color-coded based on an assigned department, cost-center, or workplace entity.
- Spaces with an assigned neighborhood are filled with neighborhood color on the map.
- The **Select all** and **Deselect all** options can be used to select or deselect neighborhoods.
- Spaces belonging to more than one Neighborhood are represented with a unique color and the neighborhood is displayed in the map legend with "&".

12. Tap to select the Map controls or symbols that are available on the map.

- Reset north: Option to select the Reset north icon ( ).
- Refresh view: To refresh the map manually, select the Refreshed view icon .
- Map display settings: Select the Map setting icon ( ) to open the display options:
- Zoom controls: Option to zoom in and zoom out on the map. The Zoom in control icon ( ) and zoom out control icon ( ) can be used to change the zoom level of the map.

13. To switch to Card view, select the **Card view** tab.



14. Select a campus from the All campuses screen.

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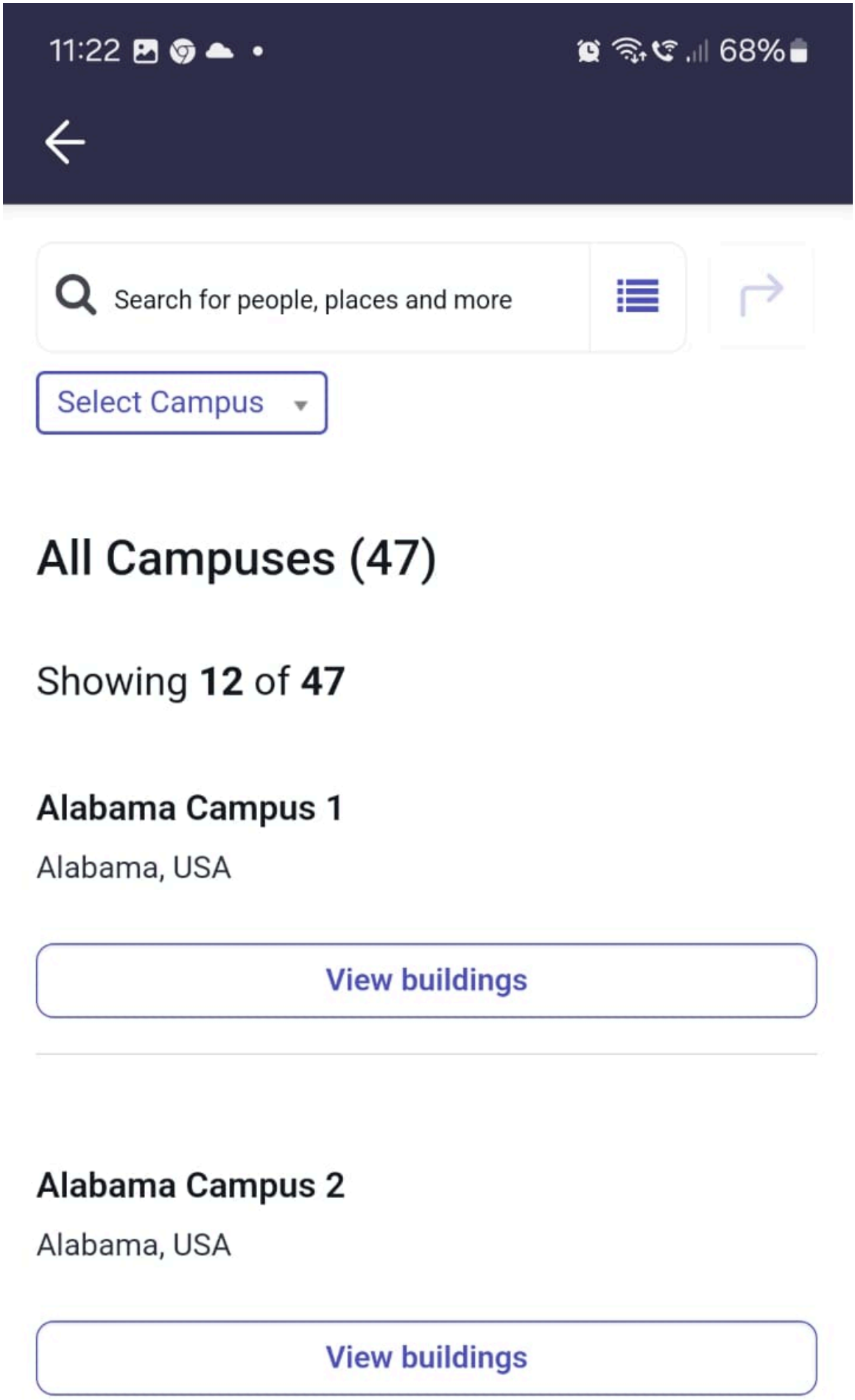

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The **Select building** tab is enabled when you select a campus.

15. Tap to select a building.

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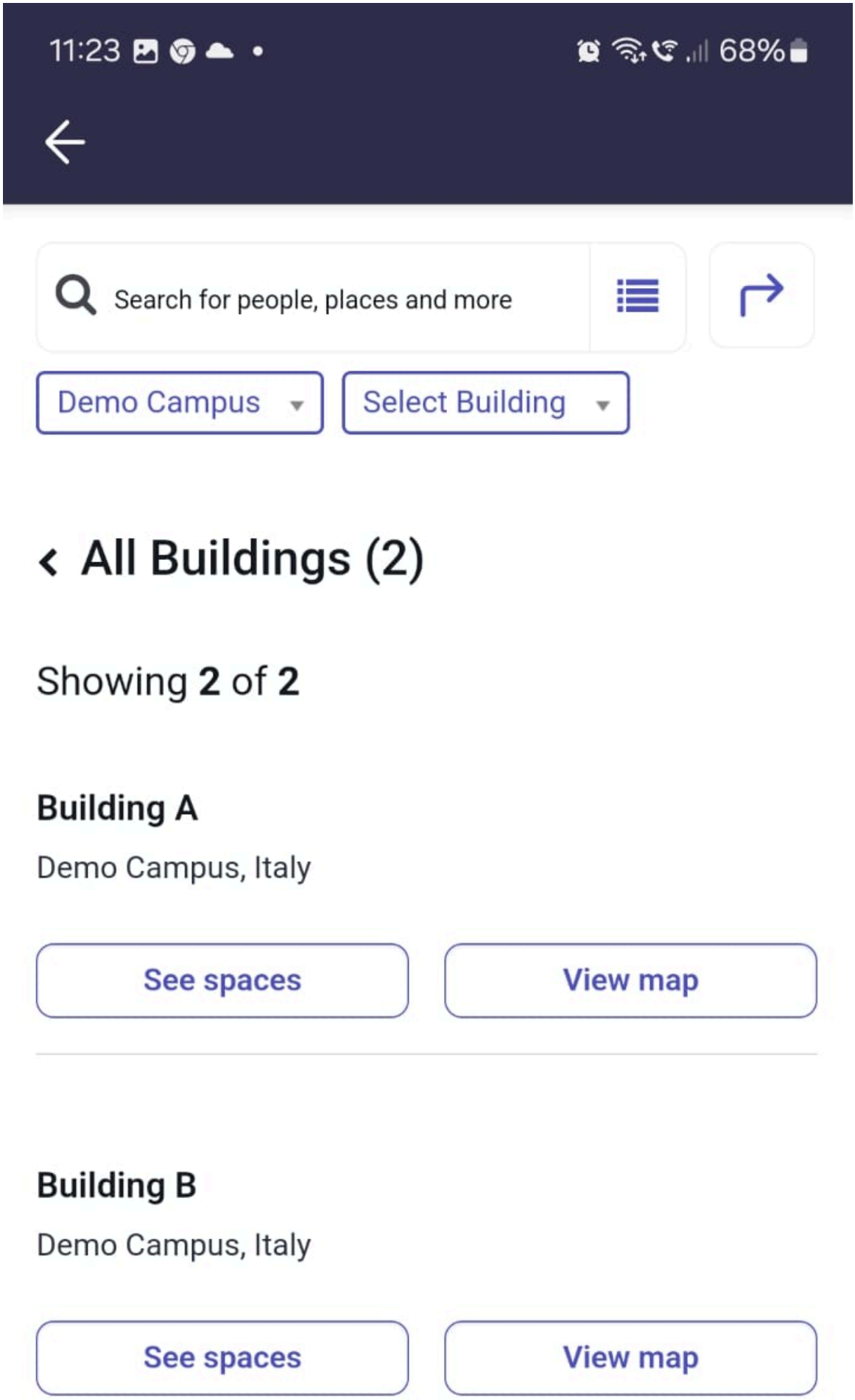

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The **Floor** and **Filter** menu options are activated when you select a building.

16. Tap to select a floor from the **Floor** list options.

    The All Spaces screen appears for a selected floor. Spaces in a building are displayed as individual cards.

17. Tap to select a space from the All Spaces page.

    The space card provides the following information:

    - Option to mark a space as favorite ( )
    - Space name
    - Occupancy status
    - Reservation status
    - Space image
    - Floor, building, and campus name and details
    - Space Capacity
    - Standard workplace services
    - Neighborhood

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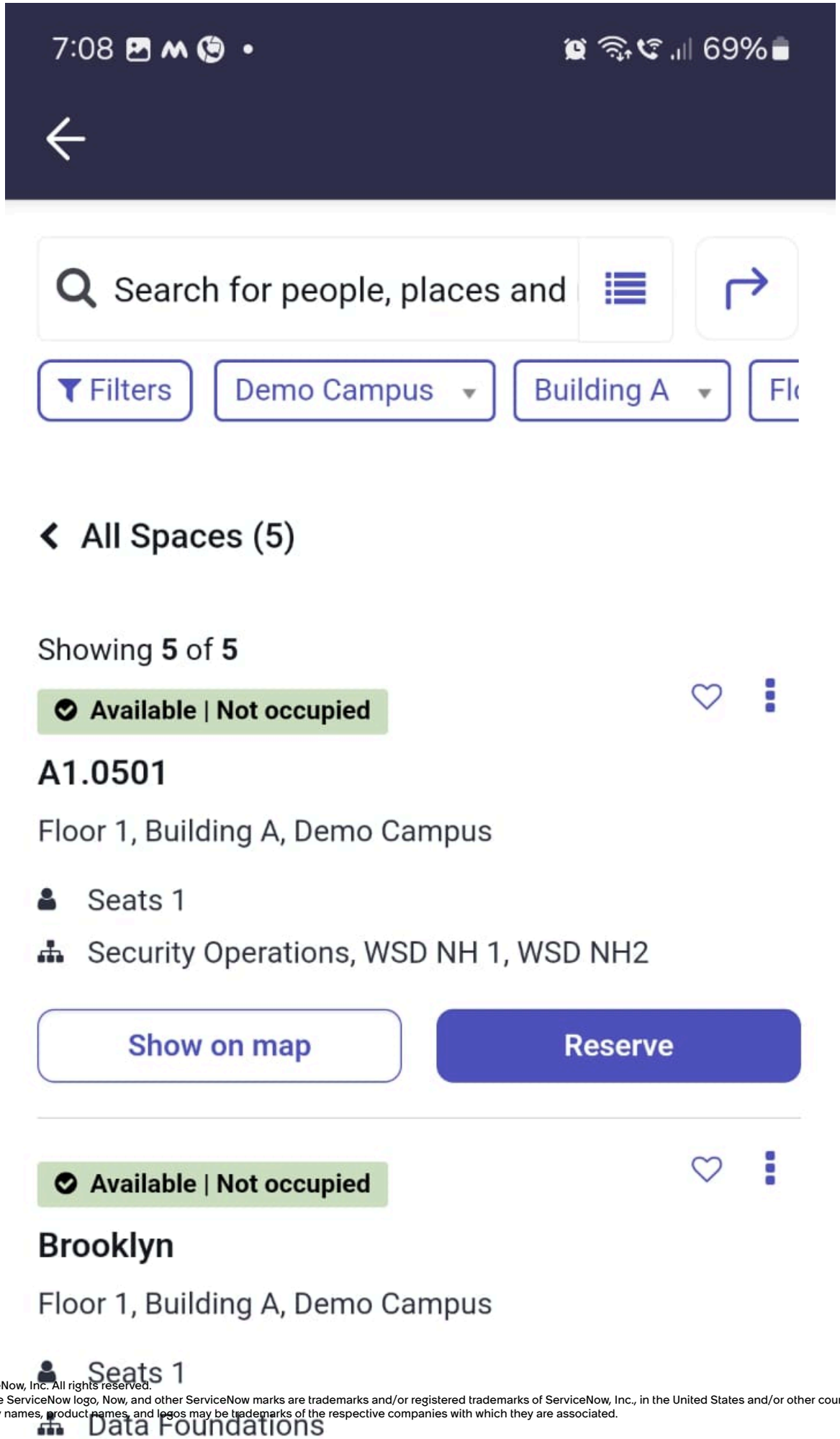

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18. Select **Show on map** to show the selected space on the map.
    The selected space opens in the Map view and displays the space card panel.

    Note: The Show on the map is inactive or grayed out when there's no floor map available for a space.

19. Select **Reserve** to reserve a space.
    Complete your reservation using the Reservation details screen.
20. **Optional:** On the Space card panel, select **Get directions** for wayfinding and visual representation of the routes on a map to navigate to a workplace location or a team member. On selecting **Get directions**, you're redirected to the Map view.
21. **Optional:** Select **Raise an issue** to request a workplace service or raise a workplace service issue.
22. Select a space and select the More actions icon (⋮).
    - Copy URL: Option to share the space location URL link and share it with your team members.
    - Raise an Issue: Option to raise a workplace service request. This option is available in the More actions option only for a space that can be booked or reserved. In case if a space is already reserved or not available, then the Raise an issue option is available as a button in the space card.

Workplace Service Delivery for Mobile references

Learn more about the system properties installed with the Workplace Service Delivery for Mobile application.

Components installed with Workplace Service Delivery for Mobile

The following table, role, and properties are installed with Workplace Service Delivery for Mobile.

Table installed with Workplace Service Delivery for Mobile

Table installed with Workplace Service Delivery for Mobile

Table	Description
Mobile reservations (sn_wsd_mobile_st_mobile_reservation)	Stores reservation data for Workplace Service Delivery for Mobile.

Properties installed with Workplace Service Delivery for Mobile

Several properties are available with Workplace Service Delivery for Mobile.

Properties for Workplace Service Delivery for Mobile

Property	Description
Proximity search limit for spaces to browse near a person using Now mobile (sn_wsd_mobile.mobile_proximity_search_limit)	This property enables you to set the search limit when an employee searches for a workplace near another user. • Type: integer • Default value: **5**

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Properties for Workplace Service Delivery for Mobile (continued)

Property	Description
Enable Map view option for WSD Mobile Reservations [sn_wsd_mobile.enable_map_view_for_mobile_reservations]	This property shows the **Toggle map view** option while making a reservation from the mobile app.

Note: These properties are derived from the system properties [sys_properties.list] table.

Indoor Mapping

Indoor Mapping Map Studio provides building visualization and wayfinding capabilities to workplace users within a campus, building, floor, and work spaces. Indoor Mapping Map Studio is the interface where you visualize and design your maps to create digitalized interactive locations within workplaces and buildings.

Design and manage your indoor maps

Create campus, buildings and floors, import your floor plan source files, and manage and update your maps objects and data in Map Studio.

Get started

Explore

Learn about Indoor Mapping concepts and features.

Configure

Install and configure Indoor Mapping as your map provider

Manage

Create Indoor Mapping map objects and map data

References

Work with

Indoor Mapping

components, roles, and properties

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University

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- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Indoor Mapping

Indoor maps objects and data can be synchronized with Workplace Service Delivery and can be used for reservation management, case management, move management, and within the location directory for wayfinding.

Map creation and content management

Create, manage, and edit your maps from a single place with Indoor Mapping Map Studio. End users can visualize the building interiors, other indoor and outdoor details for a selected campus, building, or floor.

Indoor Mapping provides capabilities within the Map Studio to digitalize workplace floor plans. Using the Map Studio interface, map admins and map editors can create and update maps that can be used across the Workplace Service Delivery suite:

1. Get real-time insights on space utilization within a building for meeting rooms, venue, and workspaces using Reservation Management.
2. Fulfill service requests quickly with Workplace Service Delivery case management. View space details and use indoor maps to locate a campus, building, or floor interiors.
3. Use Workplace Service Delivery move management to request and move a desk from one location to another. Ensure that the workspace is mapped to Indoor Mapping map data.
4. Provide interactive locations and wayfinding solutions by providing the start and destination points on indoor maps. For more information, see Work with Location Directory for Now Mobile app and Work with the Map view on the Location Directory.

Indoor maps can be created by importing and converting existing architectural or engineering floor plan to create indoor maps. Indoor Mapping supports AutoCAD files (DWG and DXF) and raster sources (PNG) files. For more information, see Import CAD files to Map Studio and Import Raster files.

Customize and manage maps with Indoor Mapping Map Studio. Collaborate in real time and update map data and objects. For more information, see Manage map objects and data.

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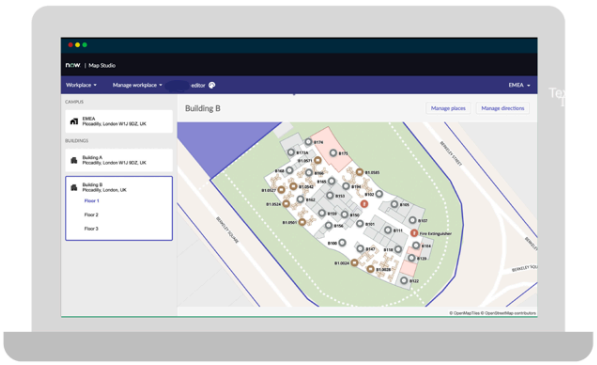
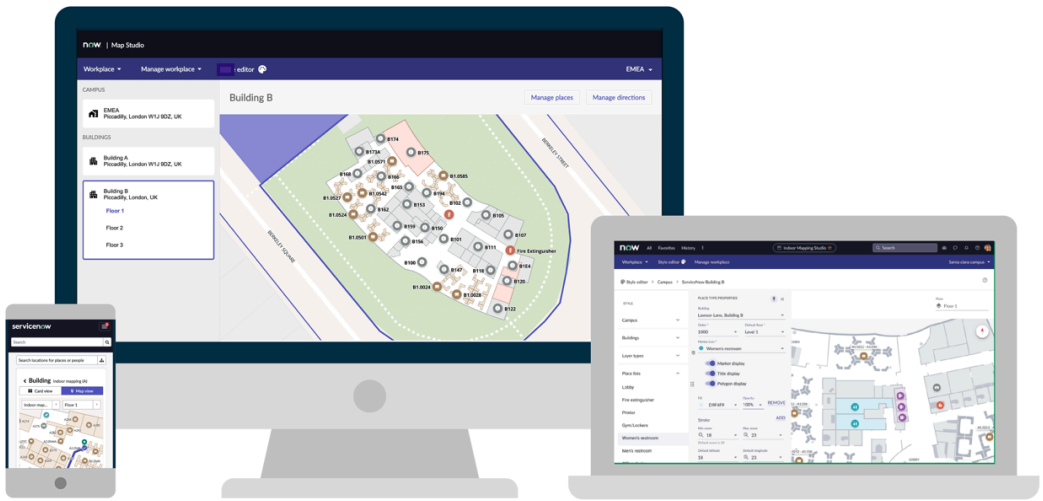
Indoor Mapping

The Indoor Mapping application provides Map Studio to enable map admins to fully digitalize floor plans and manage the entire map lifecycle. The application also provides a set of default values to configure, style and customize indoor maps.



- Indoor-Outdoor wayfinding
- Scalable
- Customized map views
- Secure
- Instant map updates
- Accessibility
- Direction Mode
- Zoom level



Configure Indoor Mapping

Install and configure Indoor Mapping map instance data and properties.

Install Indoor Mapping

Install the Indoor Mapping application (sn_map_core) with dependent plugins.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Indoor Mapping application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Note: The application includes demo data and installs related applications and plugins. For Indoor Mapping map objects and map data to work with Workplace Service Delivery[workplace-service-delivery], install both Workplace Indoor Mapping[workplace-indoor-mapping] and Indoor Mapping[indoor-mapping] in your instance.

Role required: map admin, admin

About this task

The following items are installed with Indoor Mapping:

- Roles
- Tables
- Scheduled jobs

For more information, see Map components installed with Indoor Mapping.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Indoor Mapping application (sn_map_core) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you can request it from the ServiceNow Store.

   In the list next to the **Install** button,available application versions are listed.
3. Select **Install**.

Configure your map instance data

Indoor Mapping provides a set of default parameters to display and configure all your maps.

Before you begin

Note: Map editor limited role in the Map Studio has access to only a campus or few assigned campuses. This role can only edit map objects and data for the campuses assigned to it. For more information, see Configure role-based access in Indoor Mapping.

To customize and change the map data parameters, update the default parameters in Indoor Mapping. Consider the following before creating your campuses and buildings.

Role required: map editor, map admin

Procedure

1. Navigate to **All** > **Indoor Mapping**.
2. Select any of the following map objects to configure and customize the default parameters:

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- **Campuses**: List of campuses within your organization. Edit to activate or deactivate the campuses.
- **Layer types**: Source layers specified in your maps. For example, building, grass, raster, room, wall, etc. Edit the layer types to change names and domains, visible attributes, active and inactive status.
- **Place types**: Place types available to display places on the maps. For example, auditorium, bike parking, bus station, etc. Place types are used to display content on the maps. You can edit and modify the names and domains, visible attributes, active and inactive status.
- **Direction modes**: Direction modes available for your users. For example, default (walking), accessible, bike, etc. You can edit and modify the names and domains, average speed (used to compute estimated time of arrival), direction mode icons, active and inactive status.
- **Connector types**: Connector types available on your maps. For example, stair, elevator, escalator, ramp, etc. Edit and modify the name and domain, wait time per floor, icon and zoom attributes, active and inactive status.
- **Icons**: Icons available on your maps. For example, auditorium, fire extinguisher, computer room, building, etc. Edit and modify the name, title, and domain, active and inactive status, actual file image.
- **View types**: View types available on your maps. For example, All, default, minimal. Edit and modify the name, title, and domain, outdoor style, active and inactive status.
- **Place groups**: Place groups available on your maps. Edit and modify the name, description, and domain, related campus, active and inactive status.
- **Fonts**: Font types available on the map. Edit and modify the name, description, and domain, upload new fonts.
- **Outdoor styles**: Outdoor styles available on your maps. For example, default, OpenStreetMap, etc. Edit and modify the name and description, GeoJson description, inactive and active status.

  Default Outdoor navigation styles. Outdoor Style records can be created and modified by map admins (map_admin role). Outdoor style records have a name and a style file. Style files should comply with the Mapbox style specification. For example: `default.json`, `empty.json`, or `openstreetmap.json`.

  The default.json is the default outdoor map style provided and hosted by Indoor Mapping based on OpenStreetMap data and OpenMapTiles. An empty outdoor style has a white background with no outdoor map data at all. The openstreetmap.json has the standard map tiles from OpenStreetMap directly coming from OpenStreetMap.

  Note: Users must refer to OpenStreetMap license before using this in production.

- Indoor Mapping properties: For more information about how to set the configuration properties, see Indoor Mapping properties.

Configure role-based access in Indoor Mapping

Configure Indoor Mapping to update role-based access for map administrators, map editors and the map editor limited roles.

Before you begin

Role-based access to Indoor Mapping Map Studio requires the following three roles:

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- Map administrator (sn_map_core.map_admin): Map admins in Map Studio can set up the map data and objects in Indoor Mapping Map Studio and has complete access to the application. Map admins can also manage user criteria records.
- Map editor (sn_map_core.map_editor): Map editors can set up maps in the Indoor Mapping Map Studio, import floor plans, and can manage maps (edit or delete) in the Map Studio.
- Map editor limited (sn_map_core.map_editor_limited): This role has limited access to a campus or only few campuses. Users with this role can view and edit campuses that are assigned to them. The Indoor Mapping **All** > **Indoor Mapping** > **Map Studio** menu is hidden and is not available for this role.

  Map administrators can add user criteria record to provide access to a campus for the map editor limited role. Users with map editor limited role cannot view a Campus in the application context menu search **All** > **Indoor Mapping** > **Campuses**.

Add a user criteria record to decide which users, roles, and groups can access a campus.

Role required: map admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Select and open a user record.
3. In the **Roles** related list, click **Edit**.
4. In the **Collection** list, select the **sn_map_core.map_editor_limited** role, and click **Add**.
5. Select **Save**.
6. To provide access to a campus in Map Studio, navigate to **All** > **Indoor Mapping** > **Campuses**.
7. From the Campus page, select a campus to open it.

   Select a campus for which you want which you want to provide the map editor limited role access.
8. Select **Campus Editors** tab in the Related List section.
9. Select **User criteria**, click **New**.
   On the form, fill in the fields.

Campus Editors new record

Field	Description
User criteria	Search and select Users with sn_map_core_map_editor_limited role.
Campus	Select a campus or create a new campus to provide user access to this role.

10. Click **Submit**.

> **Note:** If a user with map editor limited role deletes a building, the building is only made inactive in the database and is not actually deleted from the database.

Indoor Mapping properties

Customize and render map components and objects by updating the Indoor Mapping properties.

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Before you begin

Role required: map admin, map editor

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Indoor Mapping Properties**.
   Indoor Mapping properties are displayed. Customize the map component properties as required.
2. Fill in the form fields.

Indoor Mapping Properties

Field	Description
Map import service URL	Option to define the URL from where the Map Import Service can be reached to enable floor plans. This property is mapped to the *(sn_map_core.map_import_service.url)* system property.
Default outdoor style used in the Map Studio	Specifies the default outdoor style used in the Map Studio. This property uses the outdoor style table record including the default ones and customized styles. This property is mapped to the *sn_map_core.studio.default_outdoor_style* system property. **Note:** Do not use the "Empty" outdoor style as you cannot georeference floor plans with it.
Decide whether or not the system should prevent studio to make a call to Google geocoding API.	Mapped to the *sn_map_core.studio.prevent_google_geocoding* system property. This option if selected helps to prevent the Map Studio from making a call to Google geocoding API. The Google geocoding API is used by default in the Map Studio to provide suggestions for location address and center the map on the selected location address while creating a campus. You can prevent the use of the Google geocoding API while creating a campus by zooming into the world map to point to the location of the campus.
Maximum number of user criteria considered to determine campus editors.	Maximum number of users that can be campus editors. This property can be increased if the number of users as campus editors is more than 100. This may impact the Map Studio performance. Default value is 100 and is mapped to the *sn_map_core.max_user_criteria_count* system property.
Maximum distance in centimeters between the first and last point to convert a line to a polygon while importing an AutoCAD file	Option to automatically close all lines that are one centimeter apart on a CAD file. Creating a polygon on the map requires the poly lines to be closed in a CAD file before you import the CAD file in the Map Studio. When

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Field	Description
	the lines are not closed, enabling this property helps to deduct and close the open lines in a polygon.
Set to true to ignore hidden CAD layers during imports	Option to ignore any hidden CAD layers present in the AutoCAD source file. When this option is enabled, the hidden CAD layers are not shown on the map.
Comma-separated list of CAD layers to ignore during imports (e.g. layer1,layer2)	Option to ignore the CAD layers that you do not want to display or show on the map. The layers even if not hidden are ignored. Provide the names of layers that you want to ignore as a comma-separated list. The ignored layers are not displayed on the map after you import the CAD file.
Set to true to enable the simplification of GeoJSON features during CAD imports	Option to reduce the complexity of geometries extracted from the CAD file to improve performance using the *sn_map_core.cad_simplify_enabled* system property.
Tolerance of the simplification algorithm that can be run during AutoCAD imports if all conditions are met	Option to change the accuracy of the simplification algorithm by using use the system property *sn_map_core.cad_simplify_tolerance*. It is set to 0.1 by default which defines the level of simplification where '0' is the original geometry and nothing is changed in the geometry. When this option is set to 0.1, it provides the most accurate results by simplifying the geometry. For example, if you increase the value to 0.8, then a circle may become a triangle and the accuracy of geometry is reduced as it removes the coordinates on a geometry.
Minimum number of coordinates in a GeoJSON feature to run the simplification algorithm (if enabled) during AutoCAD imports.	Threshold to simplify complex shapes or geometries that have 20 or more coordinates by using the *sn_map_core.cad_simplify_coords_cnt_threshold* property. Default value is 20 coordinates. After uploading the CAD file in the Map Studio, import it to see the reduced coordinates or points on the map.

3. Click **Save**.

Manage CAD source files

Manage your CAD source files using the Autocad import tool in Indoor Mapping v1.8.0.

- Customers using Indoor Mapping v1.8.0 can import and configure CAD source files using the Autocad import tool. By default, the Autocad import tool is enabled in the Map Studio.
- Existing customers using Indoor Mapping v 1.7.0 and later version can migrate the CAD source files using the latest Autocad import tool in Indoor Mapping v1.8.0. If you don't want to migrate to the latest version, disable the option to configure and import the latest Autocad processing tool in the Map Studio. For more information, see Configure the AutoCAD import tool.

  If you have not installed Indoor Mapping v1.8.0, you can continue using the Autocad tool in Indoor Mapping v1.7.0 and later version.

Autocad import requirements

After adding a building, you can start importing your CAD floor plan source file in the Map Studio.

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Creating indoor maps in Indoor Mapping can be done by manually importing the CAD floor plan sources or by automating the import process using the AutoCAD import capability in the Map Studio. CAD files must meet certain requirements in the Map Studio before the CAD source files are imported. For more information, see ServiceNow Blog

Note: Map administrators must ensure that their CAD sources adhere to the import requirements of Indoor Mapping Map Studio. Before importing, ensure that the AutoCAD sources are reviewed by graphic designers for design corrections and accuracy. Import of JSON or GEOJSON files is only available for third-party mapping provider migration process.

AutoCAD files up to 200 MiB can be uploaded to the Map Studio. Uploading larger files can result in performance degradation.

Please note that even if the file is below 200MiB, the generated data might be higher depending on the file features, and this can also result in performance degradation or import issues.

File

Floors in a building should reside on an isolated file. Indoor Mapping Map Studio can only read and load one floor per file. Hence, it is important that each floor is on a unique file.

Layers

All building layers must be separated. Floor plans in AutoCAD are created using a layer system. It is important that each building element is on a different layer to style or delete elements. Display only layers that your map users need. Make sure you don't have any unnecessary details on your file as layers with too many elements can block the import process.

Note: Interactive maps must be as clear as possible. Remove non-essential items such as sinks or windows. Sort the elements when importing your floor plan by placing these elements on a separate layer.

All text objects must be isolated on a dedicated layer according to their type. Each type of object must have its own text layer.

Drawings must be isolated on a dedicated layers based on the drawing type. Ensure that each room type is on a separate layer. If you are merging elements, ensure that they imported with the same line and background color.

Names must be clear and identical from one file to another. On Map Studio, after a file is imported, the configuration is retained and automatically applied to other files only if the layer names are identical (available only in Tokyo and later releases). Map admins, map creators or map editors cannot recognize the different layers in the Map Studio if your files have different layer names. The CAD configurations are not performed automatically.

Lines

All lines must be connected to form closed shapes. Lines in the CAD file are used to draw the floor plan and define your building outline, rooms and inaccessible areas. Spaces outside the closed lines are considered open areas. For example, hallways.

Ensure that all lines and shapes are properly closed. For example, if shapes are not properly closed, rooms in a hallway are not considered a part of a hallway and points are created in the rooms.

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Export

Export your CAD file in DWG or DXF formats. Other formats are not supported. Make sure you are exporting the right version of CAD file. AutoCAD 12 (AC1009) to AutoCAD 2018–2021(AC1032) is supported in Indoor Mapping Map Studio.

Autocad import tool

The Autocad import tool in Indoor Mapping v 1.8.0 provides the ability to configure, optimize, improve the quality and level of design and details in your CAD file.

Upload your CAD source file using the latest Autocad import tool. It imports the named objects, blocks, and layers in your CAD file.

Configure the AutoCAD import tool

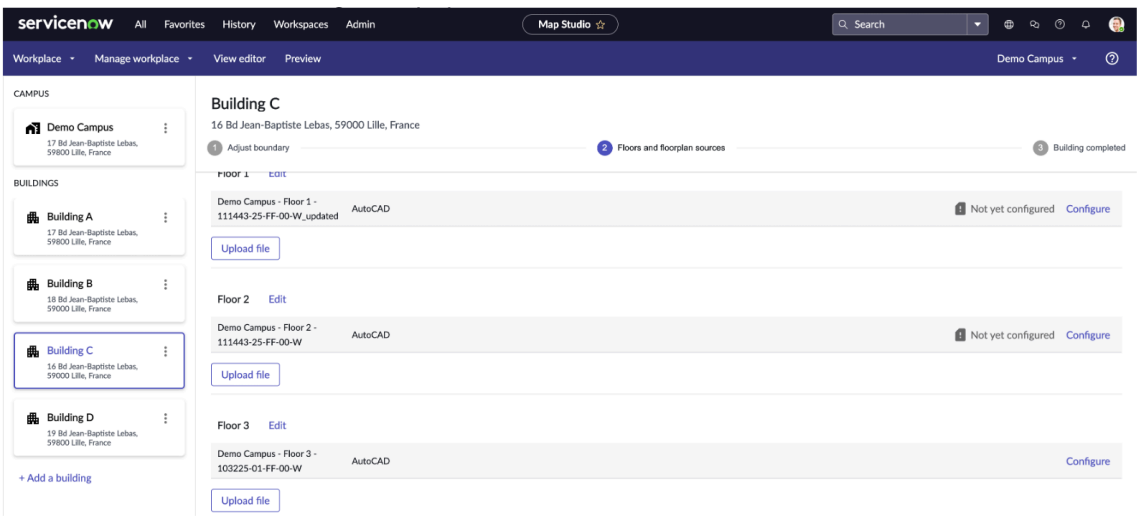
Configure and import your CAD source file to Map Studio.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a Campus.
   For example: Demo Campus.
3. Select **Continue** or navigate to **Manage Workplace** > **Floor & Floor plans**.
   This list of buildings for a selected campus is displayed.
4. Select a building from the panel.
5. Select a floor to upload your CAD source file.



6. Select **Upload** file, if your CAD source isn't uploaded and configured for a floor.
7. Select **Configure** to configure and update to your CAD file.
8. The Create a new source dialog box appears.

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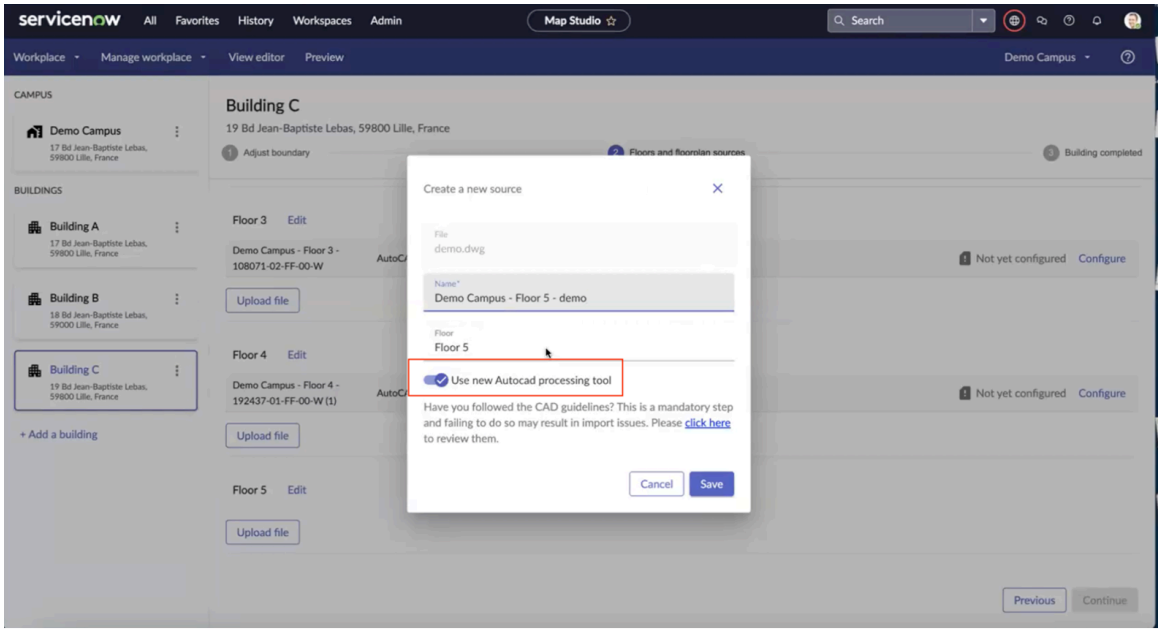

9. Complete the following information:
   - File: Name of the AutoCAD source file. For example: demo.dwg
   - Name: Campus name is added and is pre-filled by default.
   - Floor: Name of the floor where the CAD configuration changes have to be made or where the CAD file is to be imported. For example; Floor 3.
   - Use the new Autocad processing tool: By default this option is enabled.

     Note: Disable the **Use the new Autocad processing tool** button if you want to continue using the Autocad tool provided in earlier versions of Indoor Mapping (pre 1.8.0 version). For more information, see Import CAD files to Map Studio.

10. Review the CAD guidelines by selecting the **Click here** link.
11. Select **Save**.
    The CAD configuration page is displayed. For more information, see CAD configuration.

CAD configuration

The CAD Configuration page layout provides the **Map Configuration** tab and the **CAD Editor** tab options.

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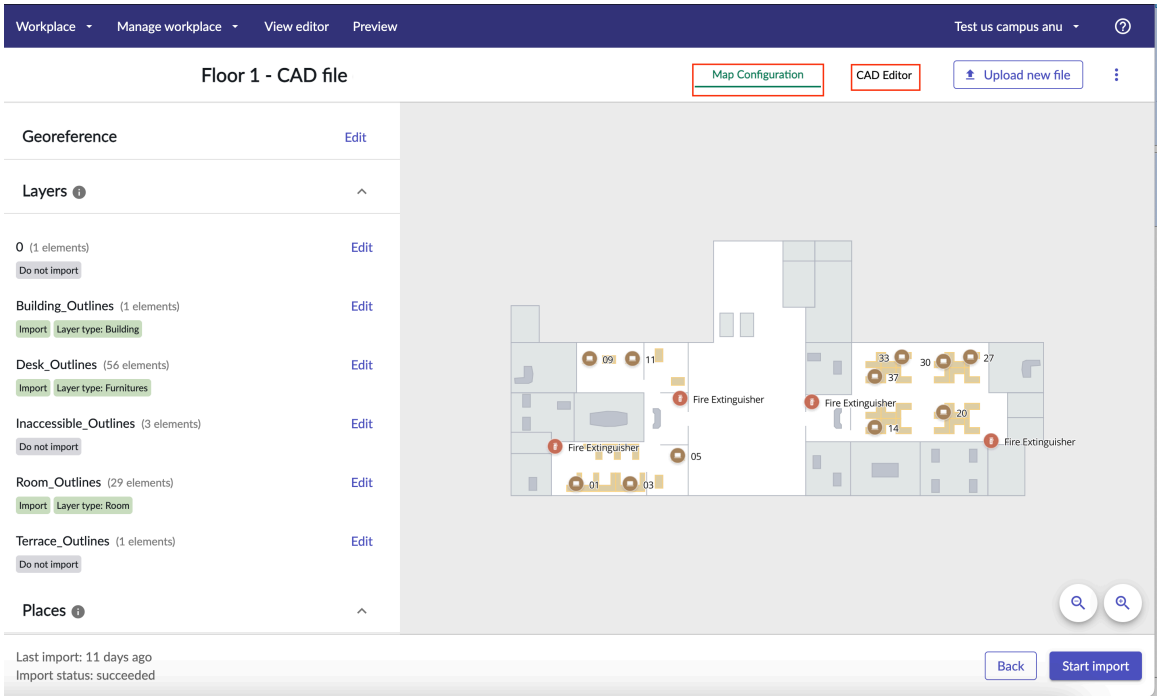
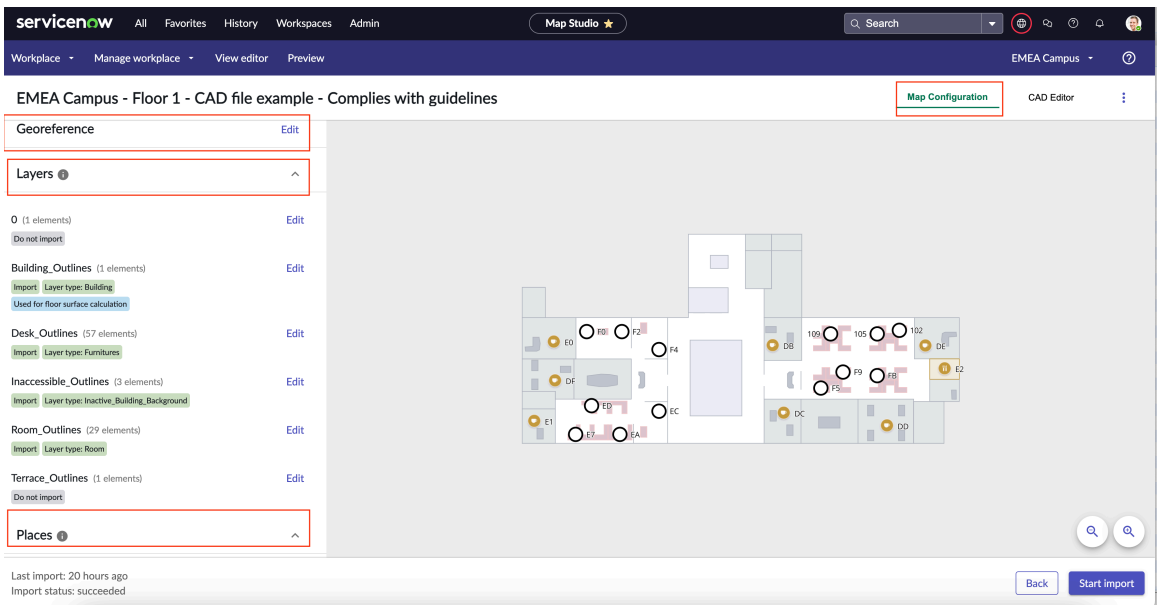


Note: Indoor Mapping retrieves the CAD configuration from previously configured files based on the layer names. If this is the first time that you are importing your CAD file or if there are few unknown layer names in your CAD file in Indoor Mapping, then, after importing the CAD file, it will not be configured and the Map Configuration preview will be blank.

Map Configuration tab

Manage CAD layers, places, text, block, layer types, and place types using the Map Configuration preview layout.

Select the **Map Configuration** tab to open the Map configuration page. For more information, see Configure CAD objects using the Map Configuration tab.



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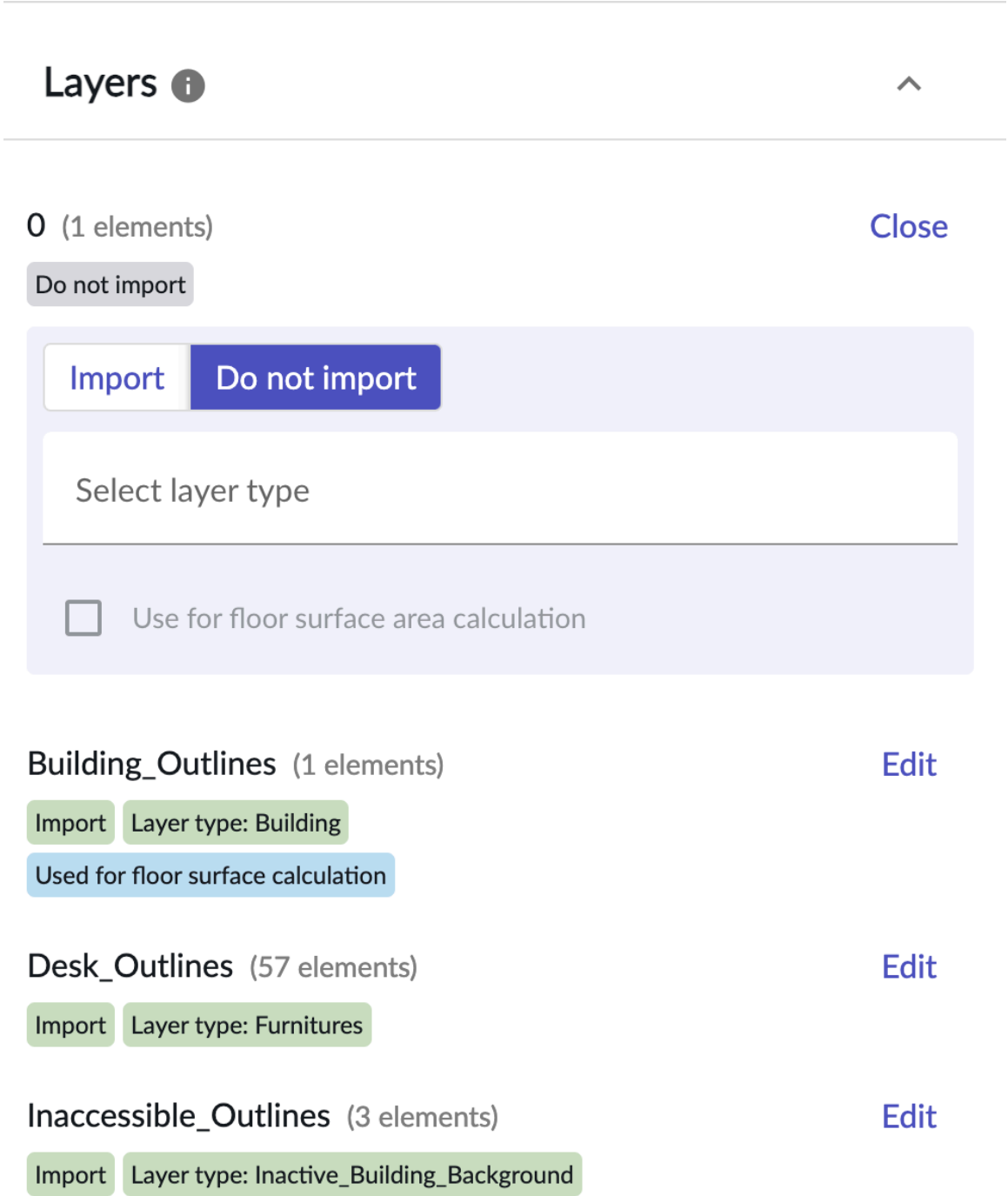
Georeference

Georeference your floor plan and position it on the map to scale and align it on the World map (OpenStreetMap). For more information, see Georeference your floor plan.

Layers

Configure the layers in your CAD file and preview it on the Map Configuration preview layout. For more information, see Configure layers.



Places

Configure place in your CAD file and preview it on the Map Configuration preview layout. For more information, see Configure places.

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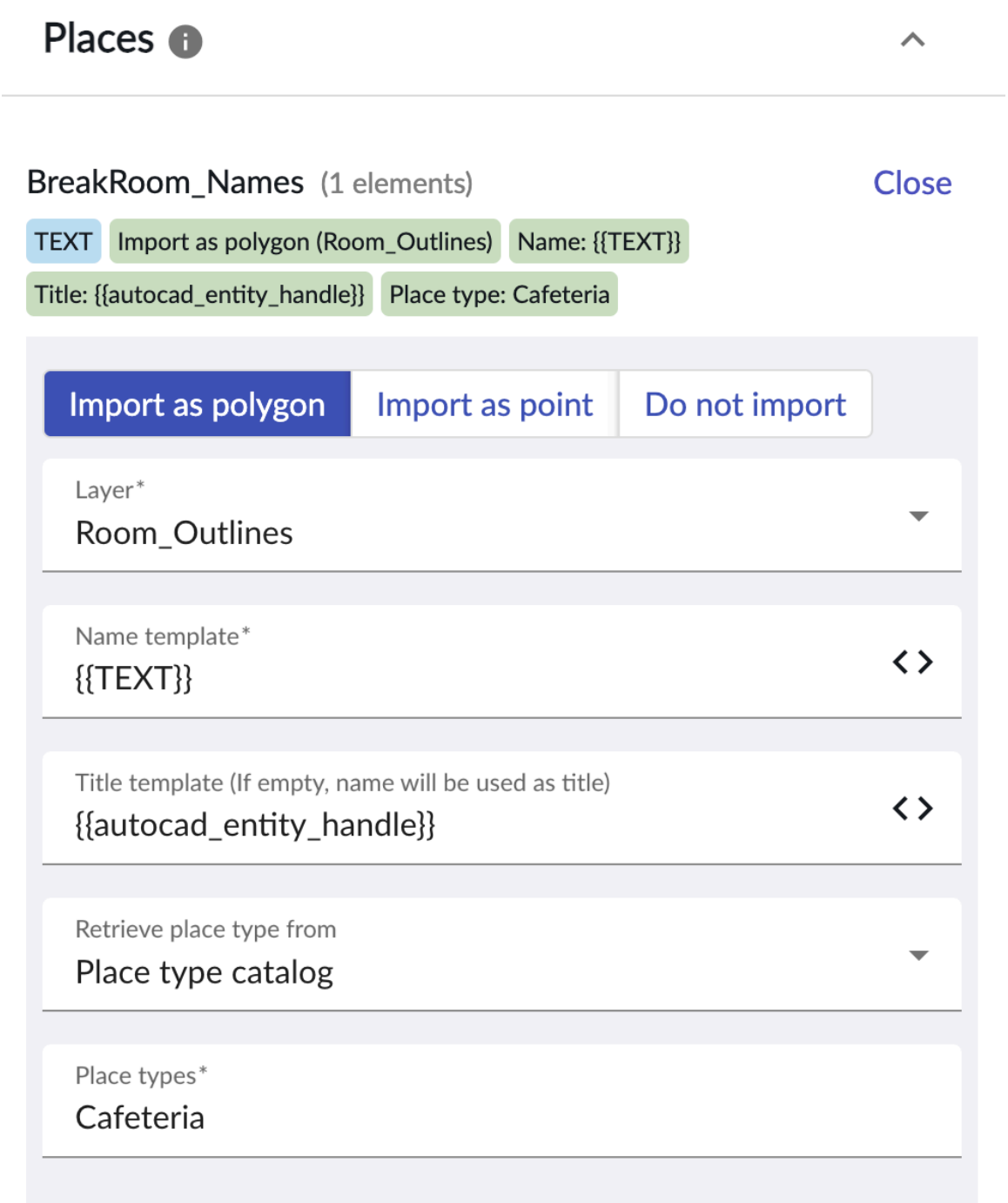

CAD Editor tab

CAD editor provides editing and drawing tools to edit and optimize your CAD source file. Add or update text, place, or a block attribute. Resolve missing polylines, polygons, and place types in your CAD file.

Configure and manage layers, places, text, and block attributes. For more information, see Configure CAD objects using the Map Configuration tab.

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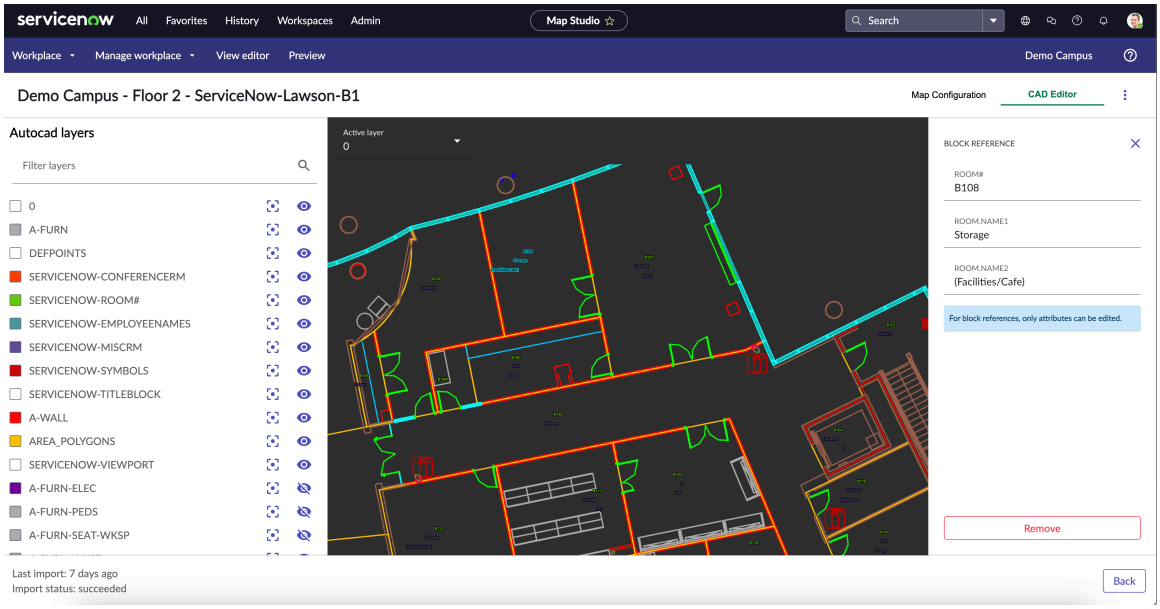
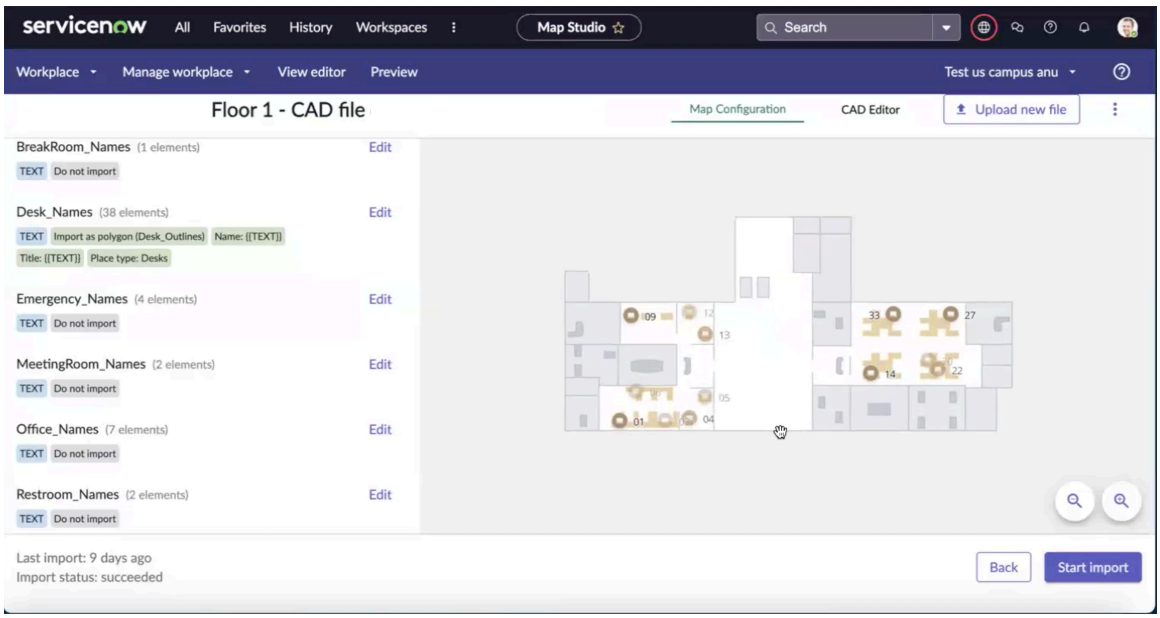


Configure CAD objects using the Map Configuration tab

Manage objects and elements in your CAD file using the Map Configuration tab.

Select a layer or place to preview it on the Map configuration preview layout.



Georeference your floor plan

Georeference and position your source floor plan on the map to scale it.

Before you begin

Role required: admin

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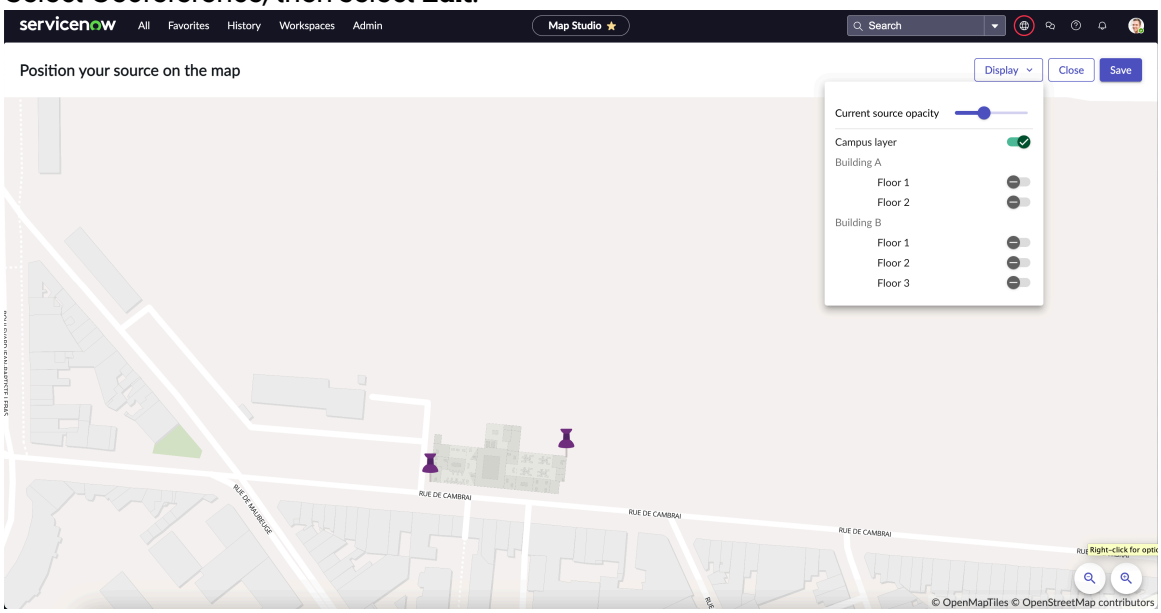
Procedure

1. Select the Map Configuration tab to display the Map configuration page.

Note: if the floor plan isn't positioned on the map, georeference isn't set ( ) alert is shown.

2. Select Georeference, then select **Edit**.



3. Move around the pins to position your floor plan on the map.
4. Select **Display**, then from the drop-down list, enable the radio button for the required floors.
5. Select **Save**.

Configure layers

Select a layer on the Map Configuration preview and edit it.

Before you begin

https://player.vimeo.com/video/1108237557?h=a4419f48c7&badge=0&autopause=0&player_id=0&app_id=58479

Layers are the shapes or geometries in your CAD file.

Role required: sn_map_core.map_admin

Procedure

1. Select the **Map Configuration** Tab.

   The Map Configuration preview page is brought into focus.

2. Expand **Layers** by selecting the chevron toggle icon ( ).
3. Select **Layers** to select a layer.
4. Select **Edit**.

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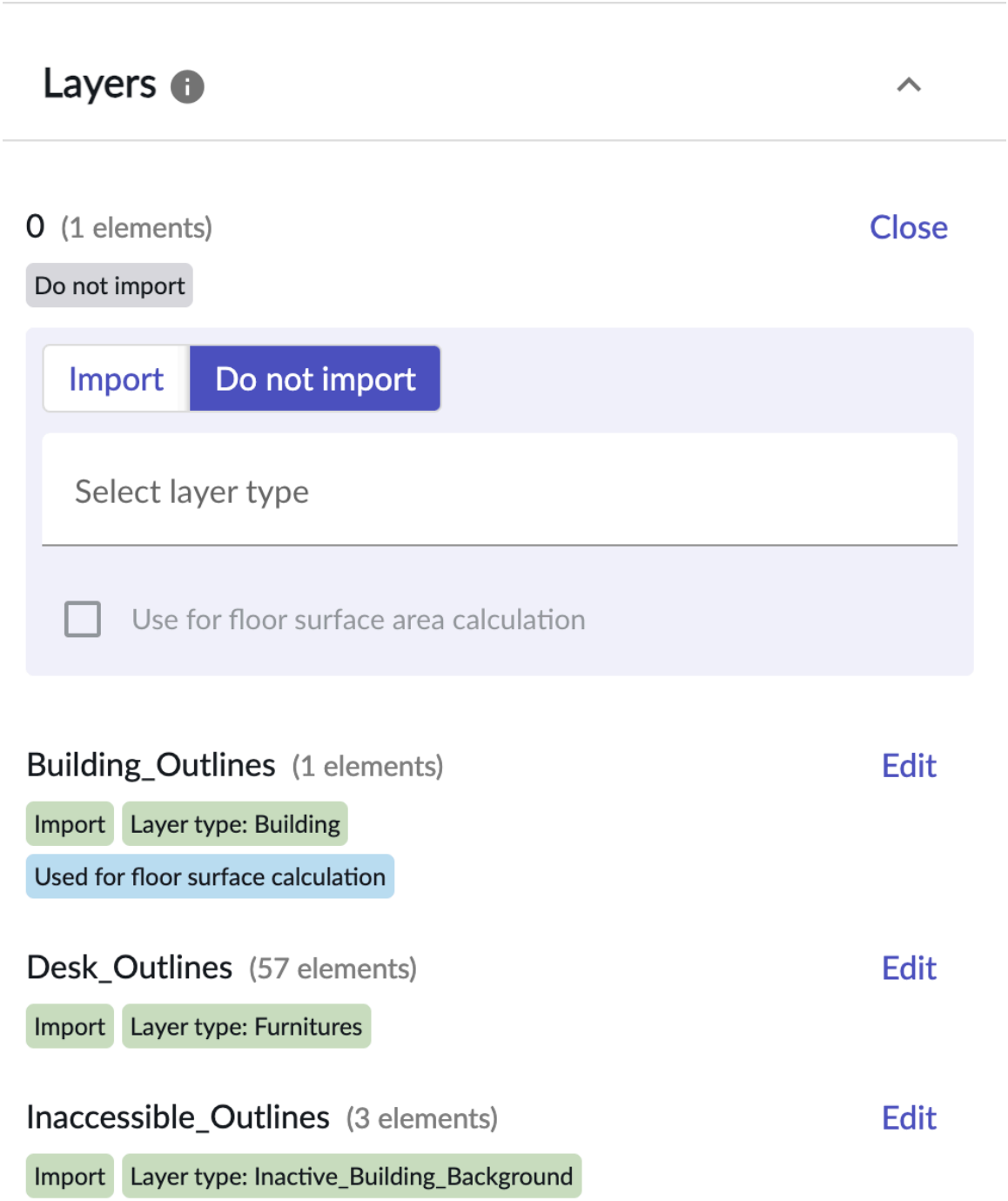
The edit panel appears.

Note: **Use for floor surface area calculation** option is not available for selection after it's enabled for a layer. For more information, see Compute Autocad floor surface area.



The selected layer shows the layer name along with the number of elements in it. For example: Logo (1442 elements)

The summary pill shows summarized information for a layer configuration. The summary pill summarizes information in the following colors based on the layer configuration and layer state:

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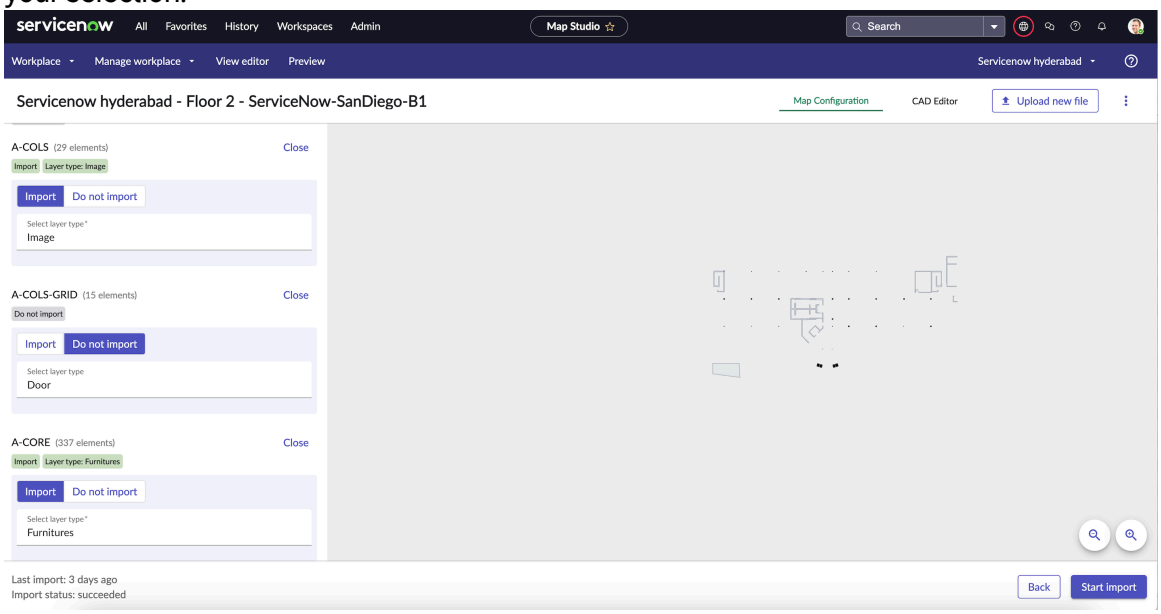
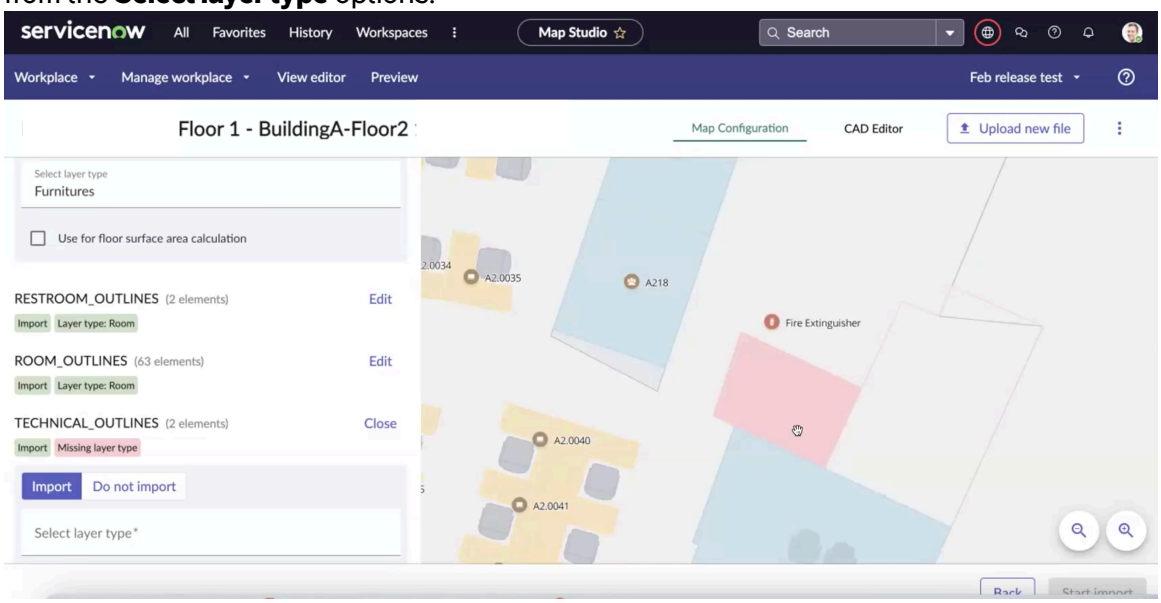
- Neutral blue: Indicates the type of item selected. For example, Text or Block.
- Green: Indicates that the place configuration is correct for a selected place.
- Orange: Indicates minor configuration issues.
- Grey: Indicates layers that are not imported.
- Red: Indicates blocking errors.

5. Select **Import** to import the elements in a layer on your CAD file.
   A validation message is displayed: Configuration saved successfully
6. Select **Do not Import** when you don't want to import a layer configuration to your CAD file.
   A validation message is displayed: Configuration saved successfully

   The selected layer elements are displayed on the Map configuration preview panel based on your selection.



7. Resolve a missing layer type (highlighted in red in the summary pill) by selecting a layer type from the **Select layer type** options.



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The missing layer type is resolved and the summary pill shows the Layer type highlighted in green. The Map Configuration preview shows the missing layer type with the newly assigned layer type.

Note: Layer types render on a map with default styles. If layer type is missing, elements will appear with a red default style.

Layer type categorizes and applies a style to a layer from the Indoor mapping Layer types table (**All** > **Indoor Mapping** > **Layer Types**)

8. To change a layer type from the current type to another, select the **Select the Layer type** option.
   For example, if your current Layer type is **Room** and you select **Building** from the list to change a layer type. The newly selected layer type along with its style and categories are applied.
9. After making the changes, select **Close** to close the edit panel.
10. Repeat the steps for the layers that you want to import to your CAD source file.

Configure places

Configure Places using the Map Configuration preview layout. Retrieve place types from the CAD file.

About this task

You can also configure shapes, names, and titles for a place type.

Before you begin

https://player.vimeo.com/video/1108237588?h=2d4e19ef4b&badge=0&autopause=0&player_id=0&app_id=58479

Role required: sn_map_core.map_admin

Procedure

1. Select the **Map Configuration** Tab.

   The Map Configuration preview page is brought into focus.
2. Expand **Places** by selecting the chevron toggle icon ( ).
3. Select **Edit** to edit the place attributes and elements.
   The edit panel appears.

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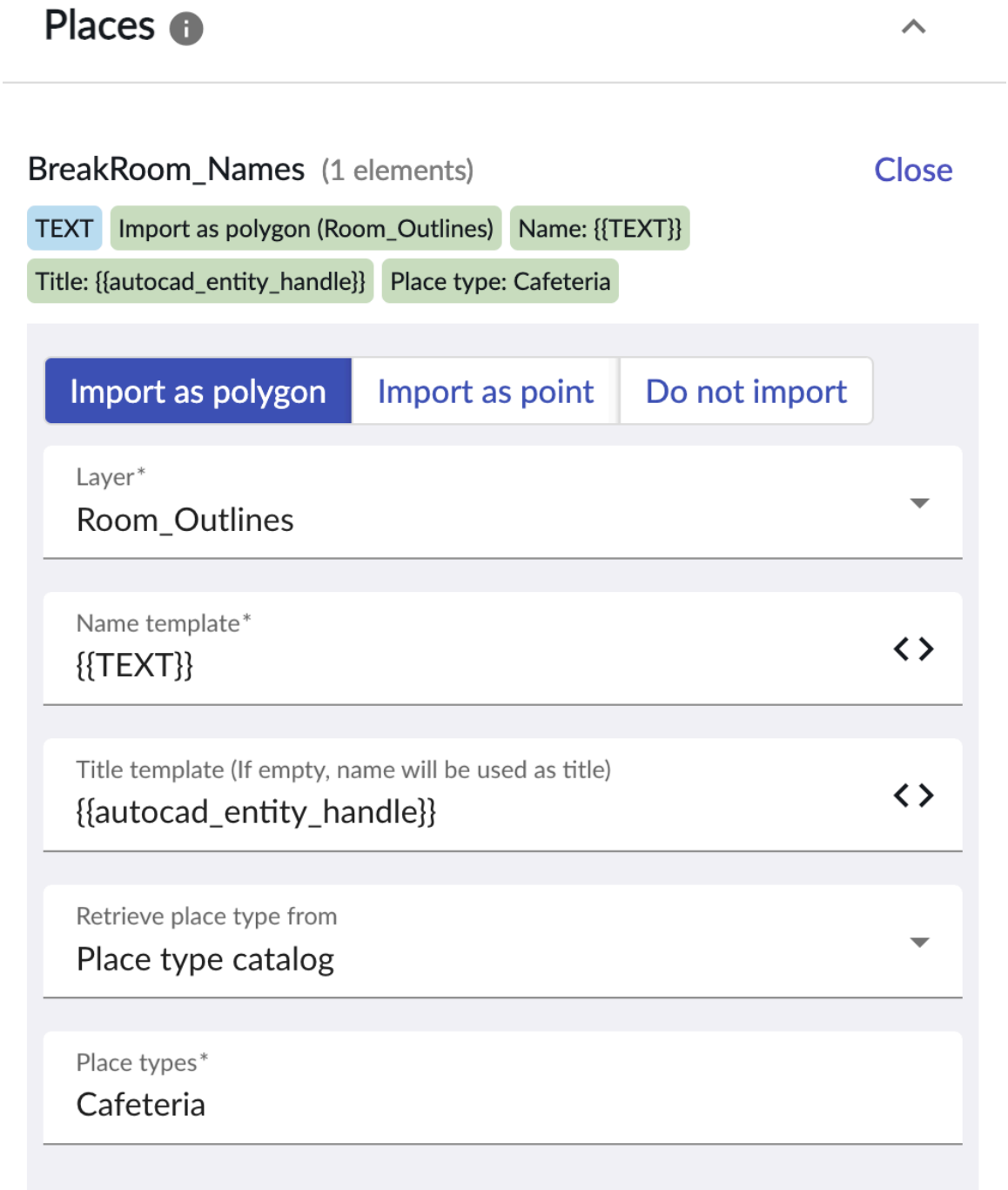

The selected place shows the number of elements in a place. For example: Breakout Room (1 element).

The summary pills summarize information about your place configuration. For example, the summary pill shows if the place is a block or text, the place type is cafeteria or patio (configuration information).

If you missed something in your configuration, the summary pills provide alerts (highlighted in red) like missing polyline, missing polygon.

The summary pill summarizes information in the following colors based on the place configuration and place state:

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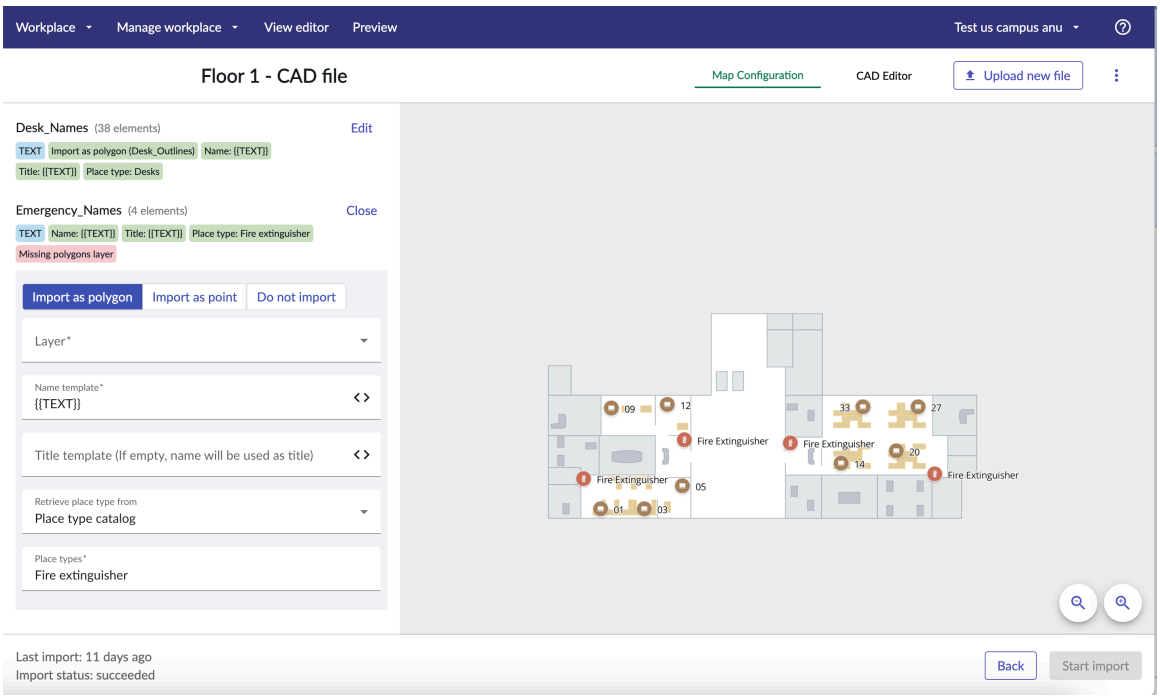
- Neutral blue: Indicates the type of item selected. For example, text or blocks.
- Green: Indicates that the place configuration is correct for a selected place.
- Orange: Indicates minor configuration issues.
- Grey: Indicates layers that are not imported.
- Red: Indicates blocking errors.

4. Select Import options (**Import as a polygon**: Step 5 or **Import as Point**: Step 7) to import the configuration to your CAD file.
   You can also select **Do not Import** if you do not want to import the configuration to your CAD file.
5. Select **Import as polygon** to import a place as a polygon in your CAD file.



Note: The text appears in red on the Map Configuration preview when you select create as polygon and the shape is missing.

a. From the **Fetch polygons from this layer** list, select the layer that specifies where the shapes for these places are located on the map.
   If the shapes for meeting rooms are on the Meeting-Room layer, select Meeting-Room from the drop-down list.

b. In the **Name template** field, enter the name template that you want to use for the places.

   You can select the following options to be used from the CAD file:

   - Select **TEXT** if you want the place name to be copied from the CAD file.

     If the place is defined a block in your CAD file, you can also select a block attribute for the Name template.

   - Select **autocad_entity_handle** if you want to use a CAD-generated unique ID for a layer. Entity names and handles are unique within a CAD drawing.

c. Select **Blocks** if you have defined block attributes in your configuration.

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Note: Blocks are not available from Indoor Mapping version 1.13.0.

d. From the **Title text layer** list, select the layer that contains titles for the places. The current layer is selected by default.

e. In the **Title template** field, enter the title template that you want to use for the places.

If this field is left empty, the name is used as Place type title.

You can select **TEXT** or **autocad_entity_handle** to add it to the field.

If the place is defined a block in your CAD file, you can also select a block attribute for the Title template.

6. In **Retrieve place type from**, select the option to retrieve place types from the CAD file. You can select any of the following options to retrieve place types from the CAD file:

- **Place type catalog**: Select this option if you want to apply the default Indoor Mapping place type styles and categories to a place type. The place type catalog or the Place types table (**All** > **Indoor Mapping** > **Place types**) contains Indoor Mapping place types and their default styles. For more information, see Create Indoor Mapping icons and place types.
  - **Place types**: Select an appropriate Indoor Mapping place type to style and categorize it. For example: Fire Extinguisher. Selected place type is displayed on the CAD editor preview.
  - When Indoor Mapping Places are integrated with Workplace Service Delivery, the places are categorized as meeting room, fire extinguisher, and so on. Based on this categorization, you can also verify if the meeting rooms are reservable.
- **Block attributes**: Select this option if you want the retrieve the place type from the block attributes.

  Note: The Block attributes name contain the place type information. The place type name in a CAD file must be the same as the place type names in the Indoor Mapping Place type catalog. If the Block attributes name doesn't match with the Place type name in Indoor Mapping, create the place type, styles, and icons in Indoor Mapping Place types. For more information, see Create Indoor Mapping icons and place types.

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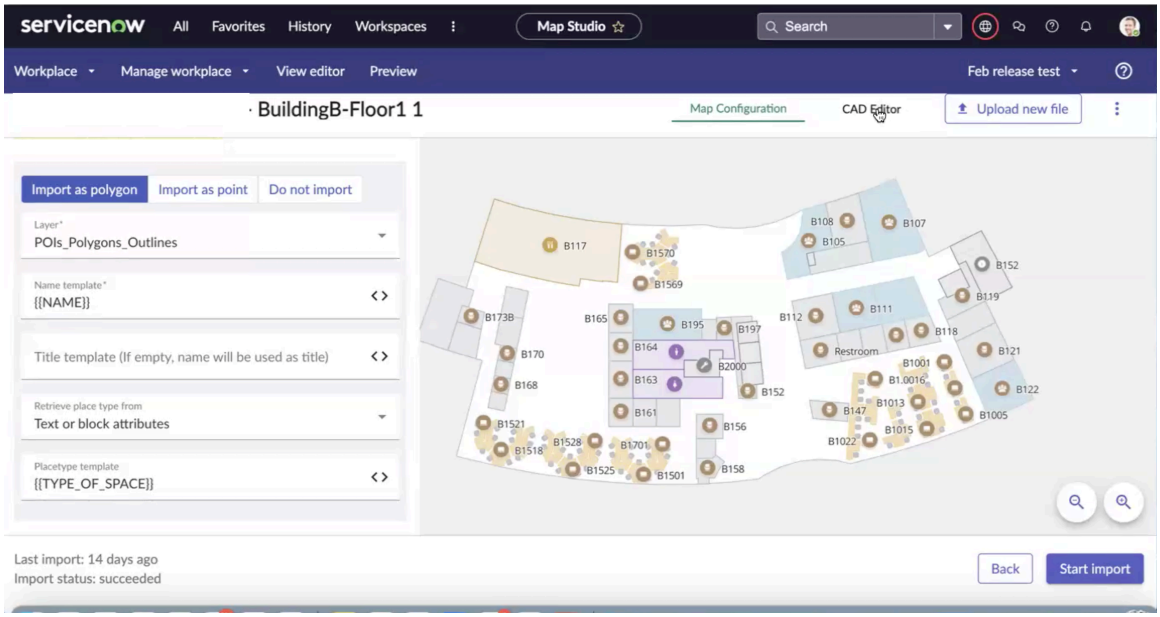

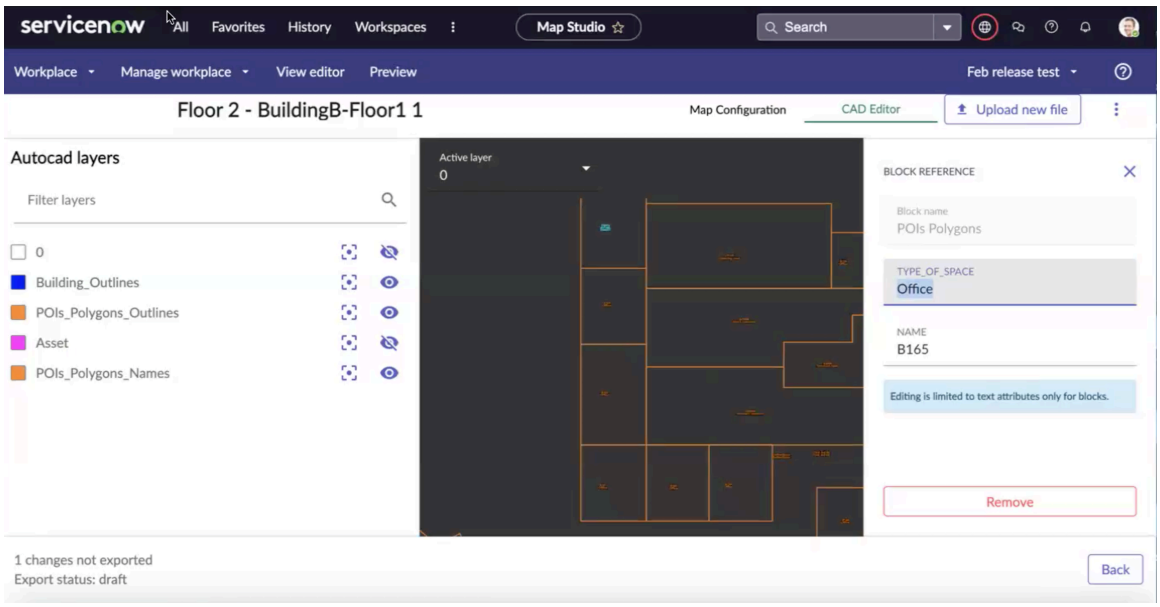

- **Other layer**: Select this option if you want to apply place types from another layer.

  From the **Place Type Text Layer** list, select the layer that contains the place types for the locations on the map, then in the **Placetype template** field, enter the template that you want to use for the place types.

- **Manually set later**: If place types are set using the **Manually set later** option, the Map Configuration preview shows the place as an unknown place type.

  When a default place type that is set manually is selected on the CAD editor preview, the message “information isn’t available on a floor plan, set manually” is displayed.

  The place type is shown as Miscellaneous or unknown type in the Indoor Mapping Place types table (**All** > **Indoor Mapping** > **Place types**). The undefined place type is matched to a miscellaneous place type in the Place types table so that it isn’t ignored during the synchronization process.

  To assign place types manually, perform any of the following:

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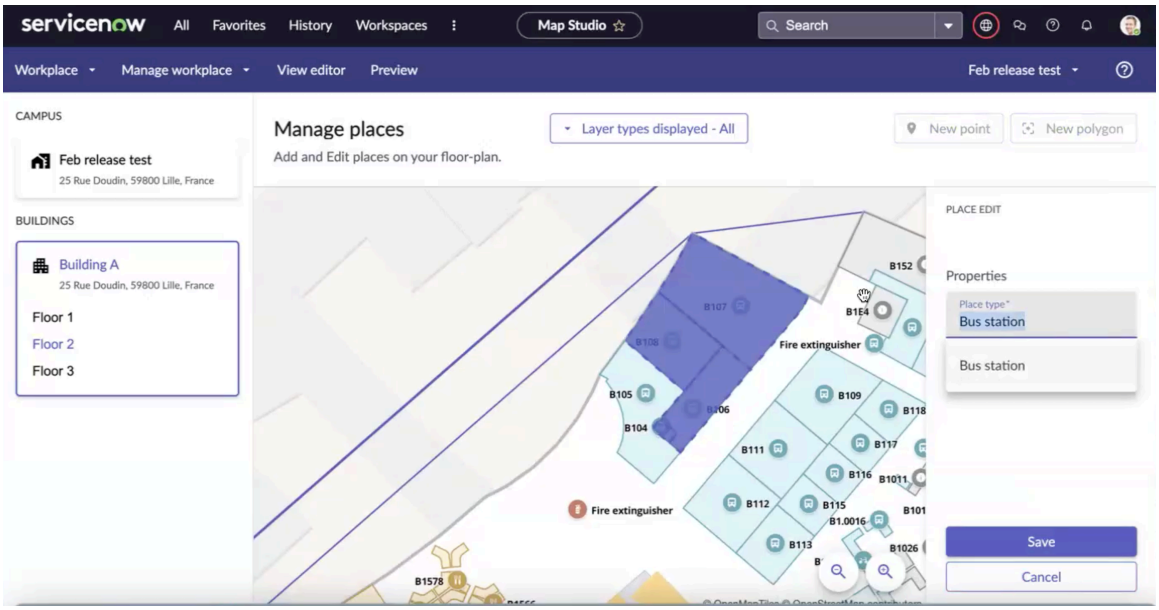
- Set the places manually using the CAD editor. Select the appropriate **Active layer**. Select places and add the place type information to the text or block attribute, if it exists.
- Navigate to Indoor Mapping Map Studio **Manage WorkplaceManage Places**. Multi-select places or select a place using a lasso or by using the Shift key option to select the required places. Select an appropriate **Place type** in the Place edit panel. For more information, see Manage places.



7. **Optional:** Select **Import as point** to import a place as a point in your CAD file.

> **Note:** The text appears in red on the Map Configuration preview when you select create as point and the shape is missing.

a. Select the following options to configure place types:

a. **Name template**: Configure the name for your template.

- Select **TEXT** if you want the Text or name to be copied from the CAD file.

  The Map configuration preview shows the name on the map for a selected place.

- Select **autocad_entity_handle** to use a CAD generated unique ID. Entity names and handles are unique within a CAD drawing.

b. Select **Blocks** if you have defined block attributes in your configuration.

c. **Title template**: Select **TEXT** or **autocad_entity_handle** if you want the Text or name from Autocad to be used.

> **Note:** If this field is left empty, the name is used as the title (See step 6 a).

8. In Retrieve Place type, select the following options:

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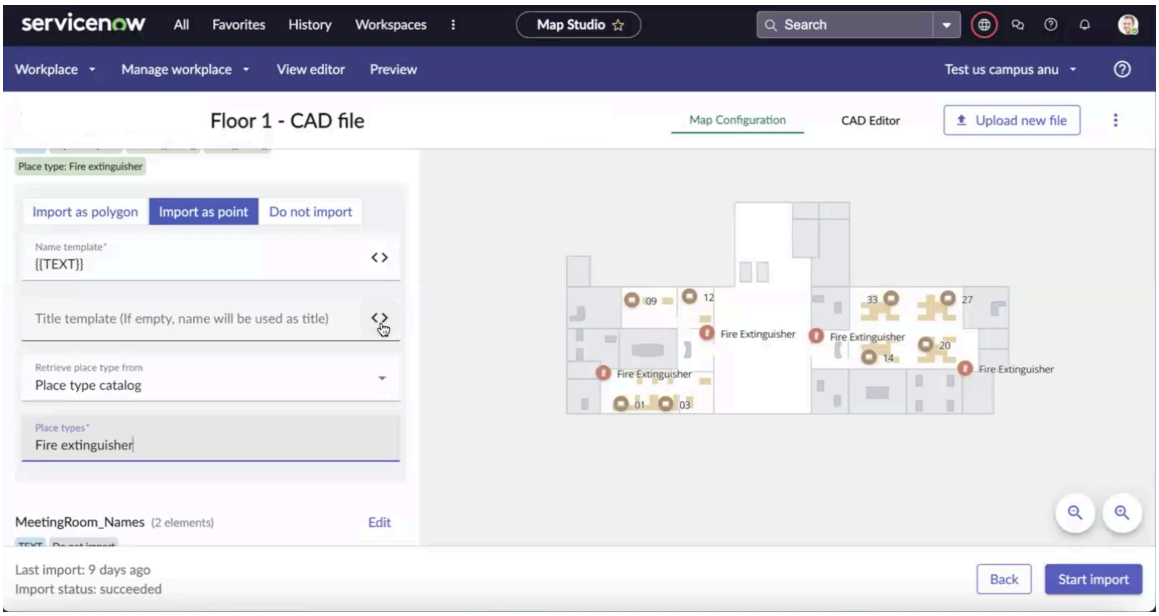
- **Place type catalog**: Option to apply Indoor mapping default style to place types. The place type catalog or Place types table (**All** > **Indoor Mapping** > **Place types**) contains Indoor Mapping place types and default styles.
  - **Place types**: Select an appropriate Indoor Mapping place type to style and categorize places. For example: Fire extinguishers.
  - The selected place type is displayed on the CAD editor preview.



- **Block attributes**: Select this option if you want the retrieve the place type from the block attributes.

  Note: The Block attributes name in a CAD file must be the same as the place type names in the Indoor Mapping Place type catalog. If the Block attributes name doesn't match with the Place type name in Indoor Mapping, make sure to first create the place type, styles, and icon in Indoor Mapping and then retrieve it.

- **Manually set later**: If Place types are set using the **Manually set later** option, the Map Configuration preview shows the place as an unknown place type.

  When a default place type that is set manually is selected on the CAD editor preview, the message “information isn’t available on a floor plan, set manually” is displayed.

  The place type is shown as Miscellaneous or unknown type in the Indoor Mapping Place types table (**All** > **Indoor Mapping** > **Place types**). The undefined place type is matched to a miscellaneous place type in the Place types table so that it isn’t ignored during the synchronization process.

  To assign place types manually, perform any of the following:

  - Set the places manually using the CAD editor. Select the appropriate **Active layer**. Select places and add the place type information to the text or block attribute, if it exists.
  - Navigate to Indoor Mapping Map Studio **Manage WorkplaceManage Places**. Multi-select places or select a place using a lasso or by using the Shift key option to select the required

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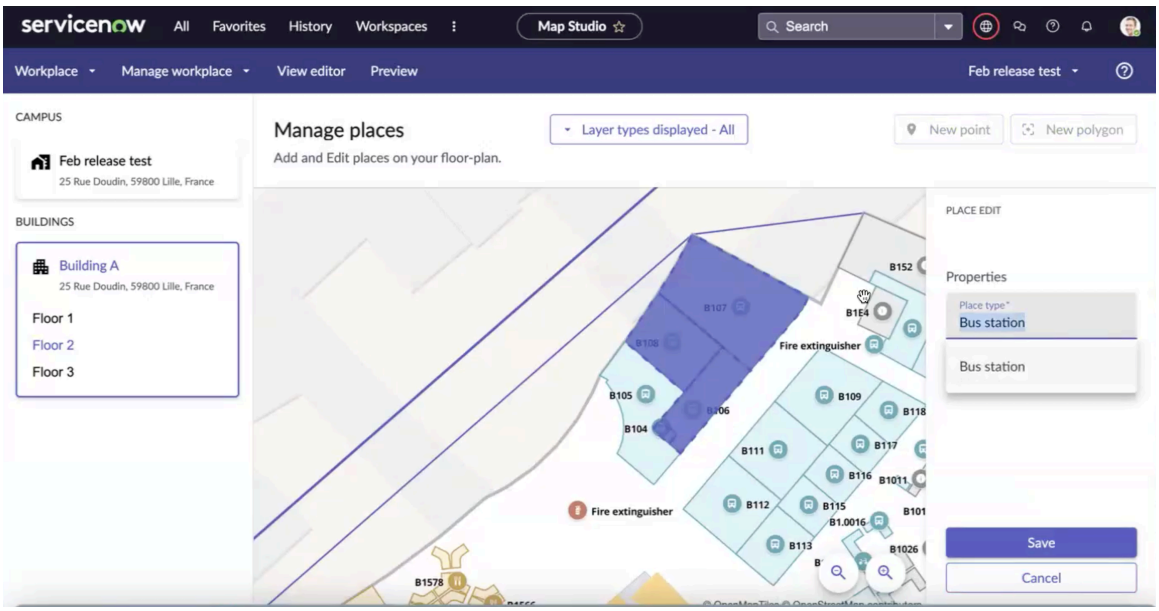
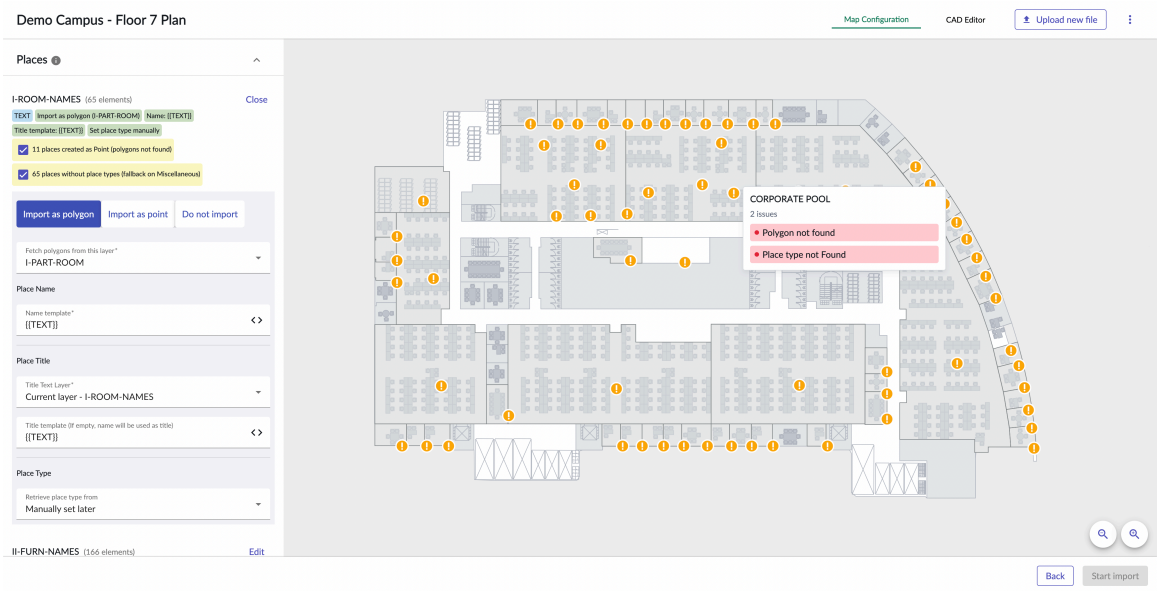
places. Select an appropriate **Place type** in the Place edit panel. For more information, see Manage places.



9. **Optional:** Select the warning check boxes to display the warnings on the map. The check boxes are updated based on the changes made on the edit panel.



10. To resolve issues like a missing polygon, perform the following steps:
    - From the Map Configuration preview, switch to the CAD Editor tab.

      For more information, see Configure CAD objects using the CAD Editor tab.
    - Select the place on the CAD Editor preview and add a polygon or a missing line.
    - Switch back to the Map configuration preview.

      Notice that the summary pill for the place shows the **Import as polygon** highlighted in green and the text is not highlighted in red. The style appears along with the polygon.

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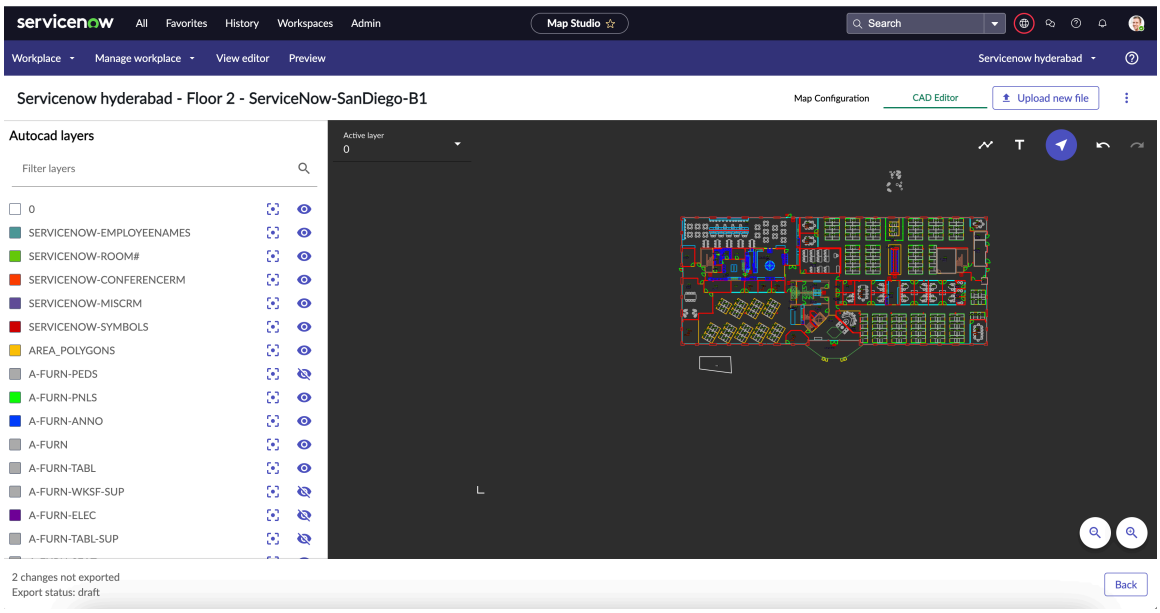
Configure CAD objects using the CAD Editor tab

Edit and manage CAD objects using the CAD Editor tab. Draw polylines or polygons, add text or mtext, edit text, place or block attributes.

The CAD Editor shows a preview of the CAD layers, places, blocks, elements, geometries, and shape. It retains the original style and color of your source CAD file. Add, remove, or update changes to your CAD file in real-time. Resolve issues like unclosed polylines, missing polygons, missing text attributes. Edit block, layer, text, and place type attributes.

Move an element from one layer to another using the **Active Layer** option. Elements within a CAD file can reside on different layers. After updating the changes to shapes, geometries, and elements in the CAD editor, switch to the Map Configuration to preview your updated changes on the map.

If your CAD file has numerous layers, use **Filter layers** to search and sort the layers that you want to select. Isolate a layer and work on it independently. Hide or show a layer on the CAD Editor preview.



Isolate a layer in the CAD editor

CAD editor provides the ability to isolate a layer from multiple layers while editing your CAD file.

Before you begin

Role required: admin

Procedure

1. Select the **CAD Editor** tab.
2. Navigate to **Autocad Layers**.

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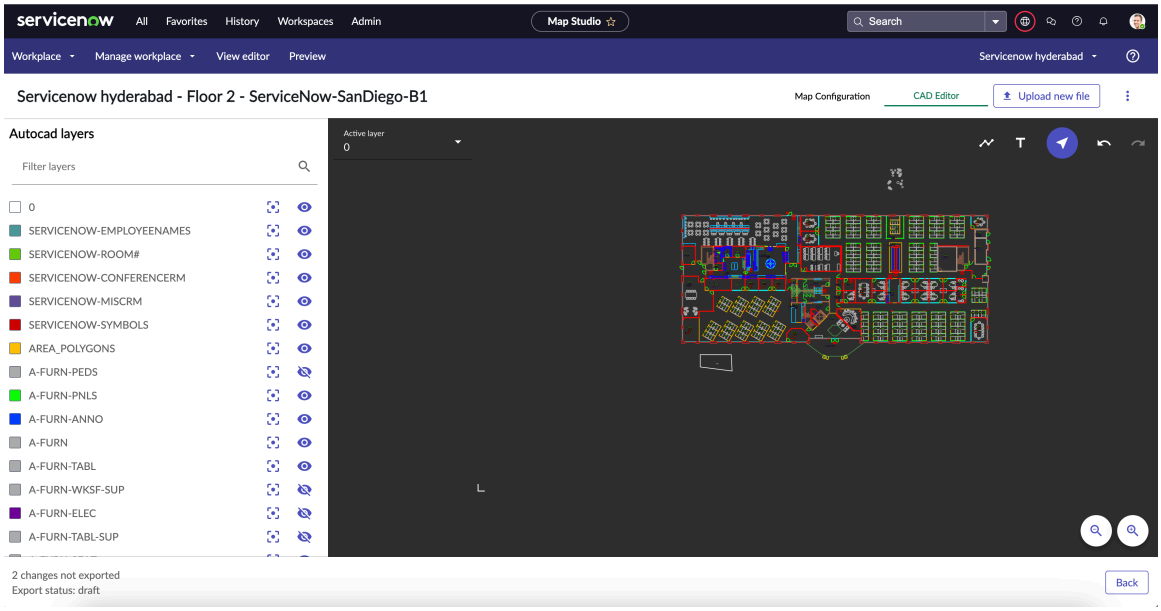

3. **Optional:** Use the **Filter layers** option to filter and search for layers.
   When you have numerous layers in your CAD file, the filter option helps in sorting and working on a few selected layers at a time.
4. Select a layer and select the Isolated icon ( ).
5. The preview shows the layer that was isolated.
   For example: polylines or polygons.
6. Use the Select tool icon ( ) to select the isolated layer in the editor.
7. **Optional:** Edit and make changes as required.

Note: Blocks can't be edited but attributes within a block can be edited.

Hide or show a layer in the CAD editor

Hide or display a layer while you're editing and updating layers in the CAD Editor.

Before you begin

Role required: admin

Procedure

1. Select the **CAD Editor** tab.
2. Navigate to **Autocad layers**.
3. Select a layer and select the toggle off visibility icon).
4. The layer is hidden and doesn't appear on the CAD Editor preview.
   For example: Room A. Room A isn't displayed for a selected layer.
5. To show a layer, select the toggle on visibility icon ( ) option.

Drawing and editing tools in the CAD editor

The CAD Editor tab provides editing and drawing tools to configure, optimize, and edit your CAD files before importing it to the Map Studio.

It provides the following editing and drawing capabilities:

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- Draw line: The Draw line tool () is used to draw a line or polyline. Use the Draw line tool to close unclosed polylines in a polygon. For more information, see Draw a polyline or a polygon.
- Text: The Draw text tool () is used to add text or mtext (multiline) text objects. For more information, see Update or add text attributes.
- Select tool: The select tool () is used to select regions, objects, or elements within an active layer.
- Undo: The undo tool () is used to revert the most recent editing action or actions to their previous state. The undo tool restores the CAD edits to its previous state before the action was performed.
- Redo: The Redo tool  is used to reapply or cancel modifications to the CAD source file in the CAD editor. The CAD editor reapplies the last action that was modified.

Draw a polyline or a polygon

Draw a polyline, polygon, or a geometrical shape using the Draw line tool available in the CAD Editor. Join lines to form a polygon or a shape.

Before you begin

For example, if you want to create a geometrical shape to form a room, you can use the Draw Line tool to draw the vertices. Similarly, resolve missing polylines in a polygon or add a missing polygon by drawing a line and joining the nodes.

Role required: admin

Procedure

1. Select the CAD editor tab.
2. Select **Active Layer**.

   Select a layer where you want to add the polyline, polygon, or a shape.
3. Select the Draw line tool  tool.
4. Select a starting point or node and drag.
5. Release the tool to create a line by selecting again on the last point that you've added.
6. To create a shape, select the starting point.

   When you draw a polygon, you must select either the first point that you've created or select the last point or node to create a line.
7. Select **Remove** to remove the element from the CAD file.

Update or add text attributes

Add, edit, update, or remove text attributes in the CAD Editor.

Before you begin

For example, if you want to change the name of a room, you can select the text and use the text edit panel to rename it.

Role required: admin

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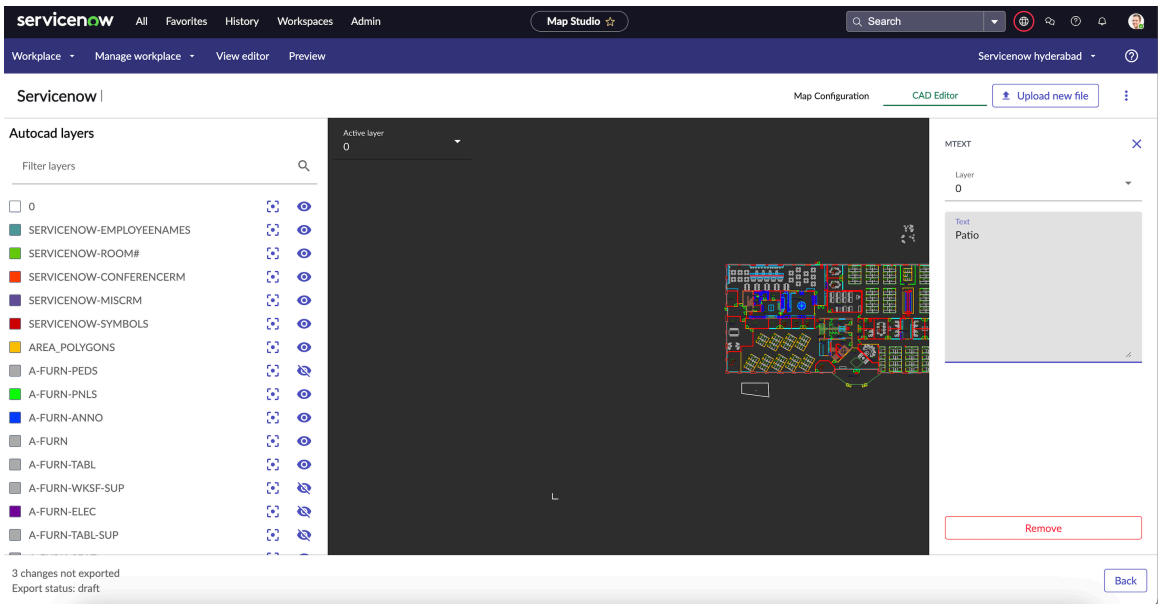
Procedure

1. Select the CAD Editor tab.
2. Select the appropriate **Active layer** on the CAD editor can.
3. Select the Text tool icon (T) from the menu.
4. Select to add the text.
5. The text edit panel opens.



6. Add the text and close the panel.

   The text attribute is added to a selected layer on the CAD file.

7. To edit an existing text, select the text to open the text edit panel and edit.
   The updated changes appear on the CAD Editor preview.
8. Select **Remove** to remove a text.

Editing block attributes

Edit block attributes in CAD Editor.

Before you begin

Note: Blocks can't be edited. Only attributes within a block can be edited. Polylines linked to a block can't be edited.

Role required: admin

Procedure

1. Select the **CAD Editor** tab.
2. On the preview layout, select a block reference.
3. The editing panel appears.

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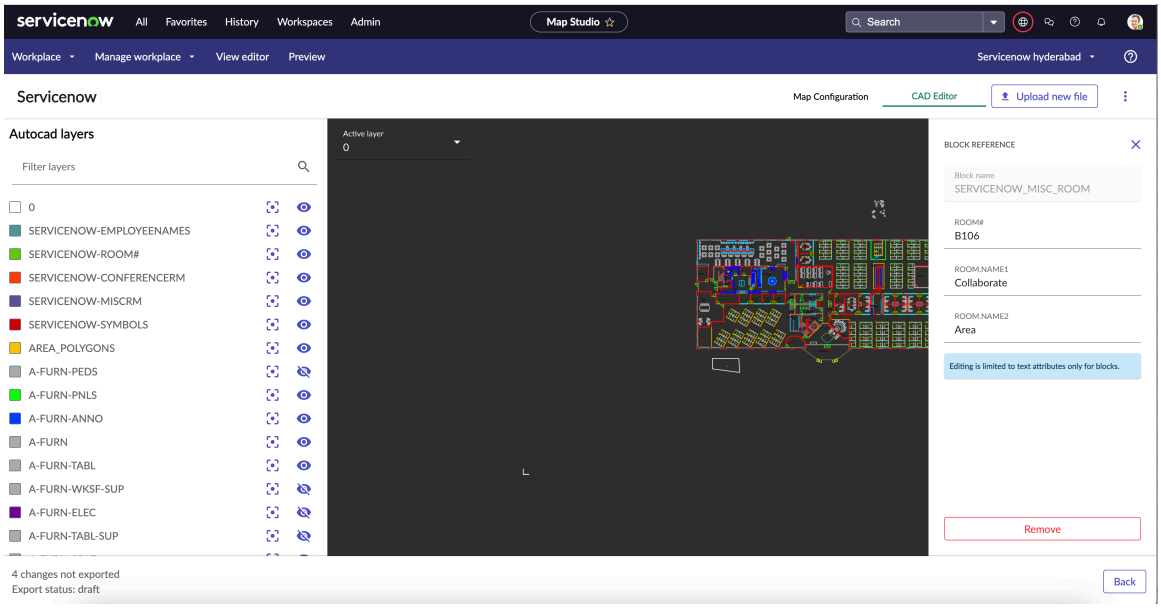

4. Edit the attributes as required.
   For example, edit the text attributes in a block.
5. Select **Remove** to remove the element from the CAD drawing.

Closing a geometry or a polyline in a layer

Close an unclosed line in a layer on the CAD editor.

Before you begin

A shape is closed when all the nodes are connected by lines. If a line is missing or if the vertices aren't joined properly, the properties for a selected geometry show the shape as unclosed.

Role required: admin

Procedure

1. Select the **CAD Editor** tab.
2. Select a polyline, a shape, or a geometry with unclosed lines or vertices in the CAD file.
3. Select to open the editing panel.

   The editing panel displays a "The shape isn't closed" validation message.

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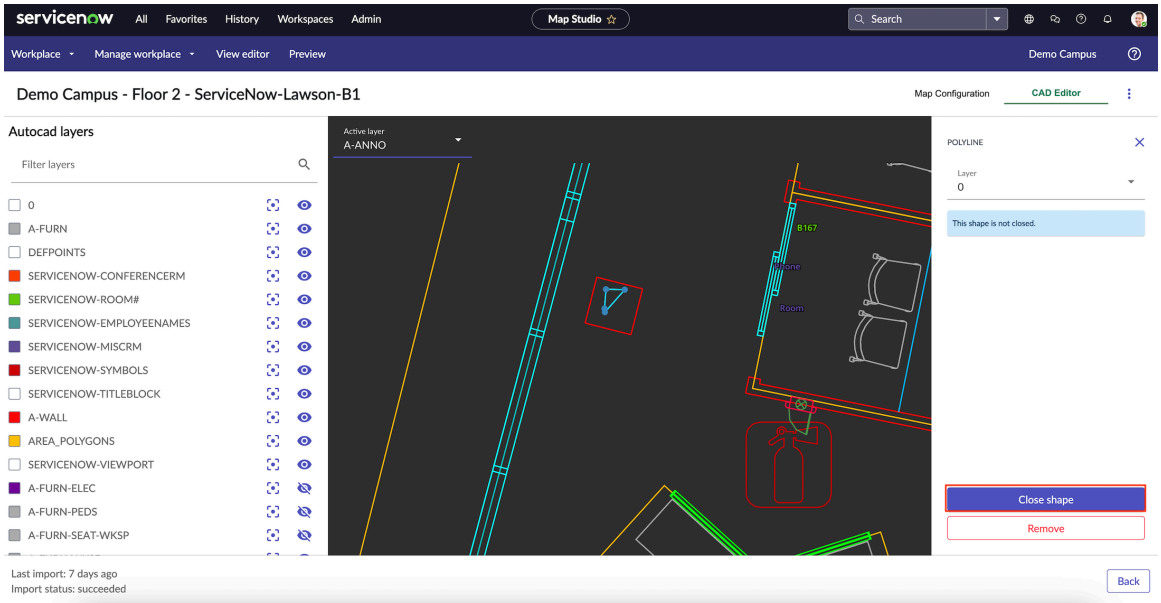
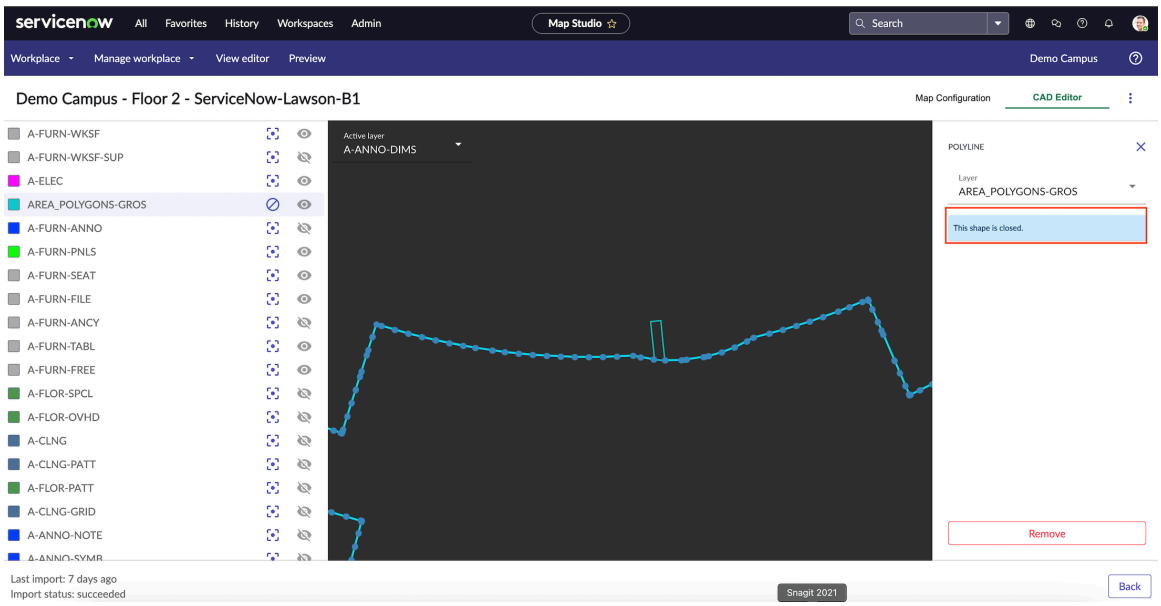


4. Select **Close shape** to close the polylines automatically.

   The shape is closed.



5. Select **Remove** to remove the element from the CAD drawing.

Export CAD configuration

Export the updated CAD changes to your CAD file. Exporting the updated changes creates a copy of the modified CAD file in Indoor Mapping.

About this task

Make configuration changes to your CAD source file using the CAD Editor and Map Configuration tabs. CAD configuration changes are updated in the Autocad Source (sn_map_core_autocad_source) table.

Note: Exporting the CAD configuration changes is an optional step. The updated CAD configuration changes reside in Indoor Mapping as an updated CAD file (a copy).

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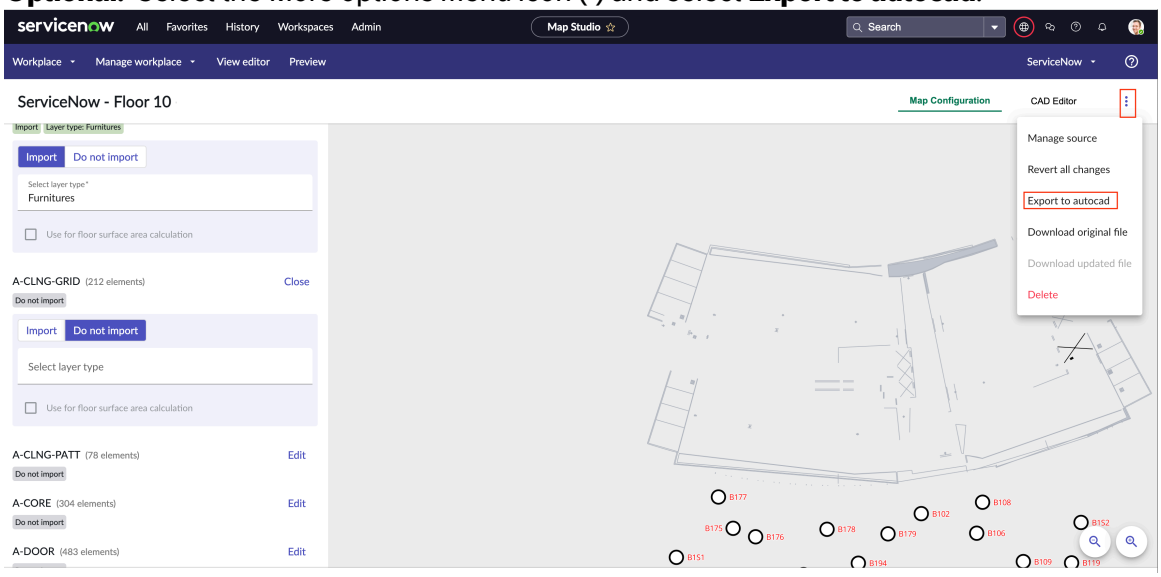
Before you begin

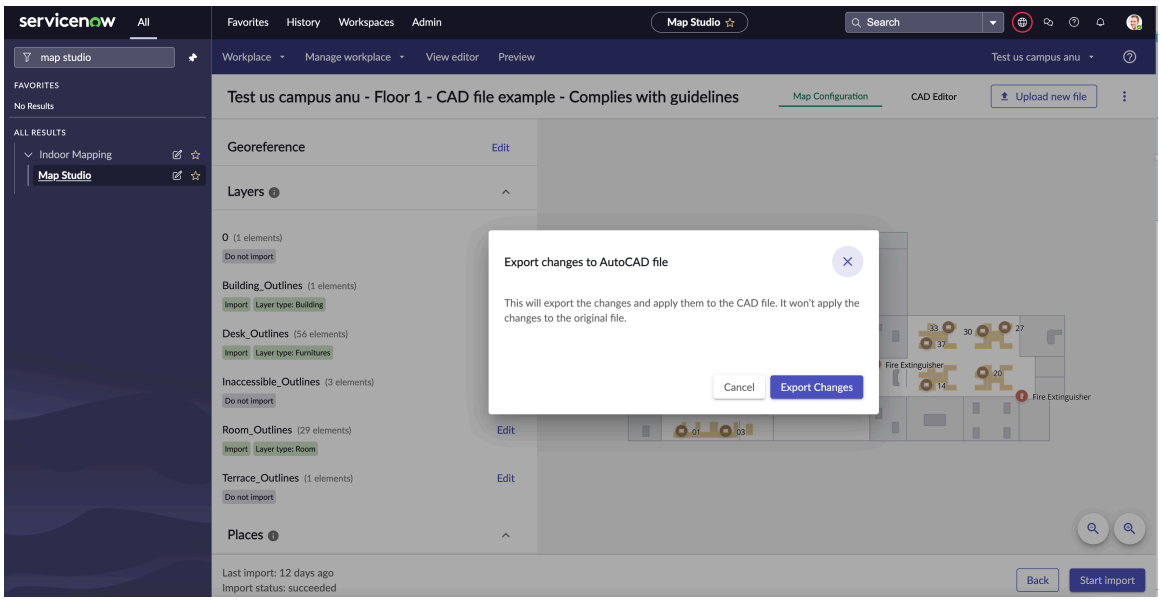
Role required: admin

Procedure

1. **Optional:** Select the More options menu icon (⋮) and select **Export to autocad**.



2. The export dialog box appears.



3. Select **Export**.

   The application may take some time to load the changes and complete the export process. The time to load depends on the size of the CAD file.

   Note: Updates made to the CAD file are only locally available in Indoor Mapping until you export the changes to your CAD file. Exporting the file keeps the CAD file up to date with changes made in Indoor Mapping.

4. The **Download updated file** option is activated in the more options menu (⋮) after you've exported your CAD changes.

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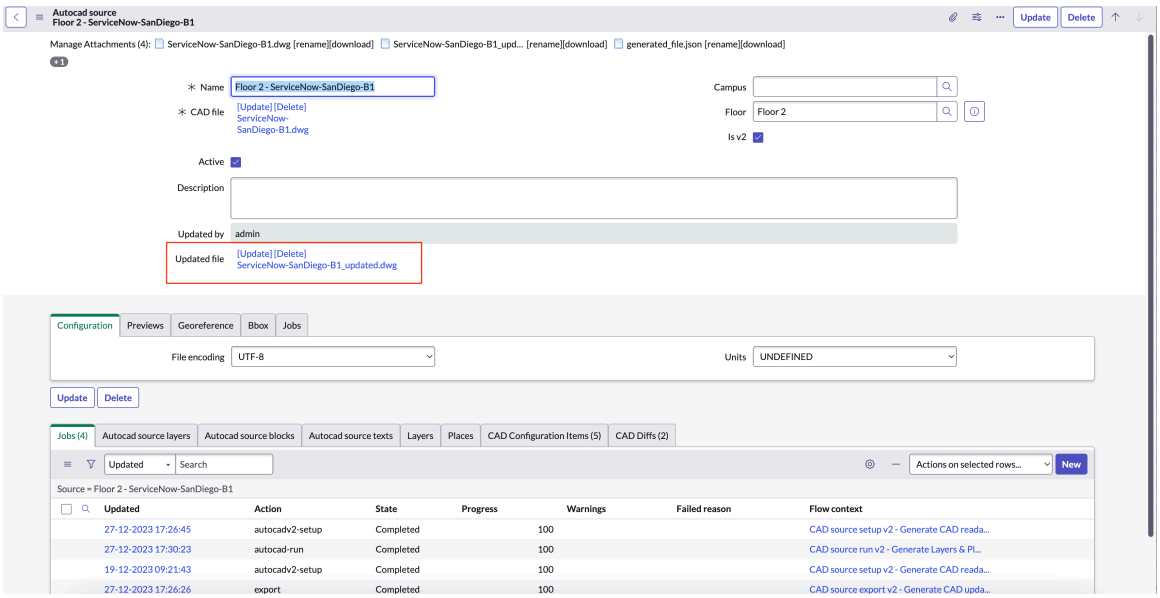
Selecting this option downloads the updated CAD file.

5. Navigate to Autocad sources (**All** and in the context menu filter by `sn_map_core_autocad_source.LIST`.
You can find the updated CAD file changes in this table.

> **Note:** The attributes that are added, modified, or deleted are updated in the Autocad source (sn_map_core_autocad_source) table. Exporting the changes doesn't apply the changes to your original CAD file. A new column is added to the Autocad source table to show the updated CAD file. Your original CAD file is kept intact. For example, your original CAD file name is **demo.dxf** and the updated CAD changes are exported to a new column **demo_updated.dxf**.

6. From the list of CAD source files, select and open the CAD file that you updated.
The exported CAD changes are available as a new file in the **Updated file** column.



Import CAD configuration

After your CAD configuration is complete, import the CAD configuration changes.

Before you begin

> **Note:** Your CAD configuration changes must be completed before you import your changes. Editing and updating your CAD source file isn't mandatory. CAD file must only be edited and updated if information is missing in your CAD file.

Role required: admin

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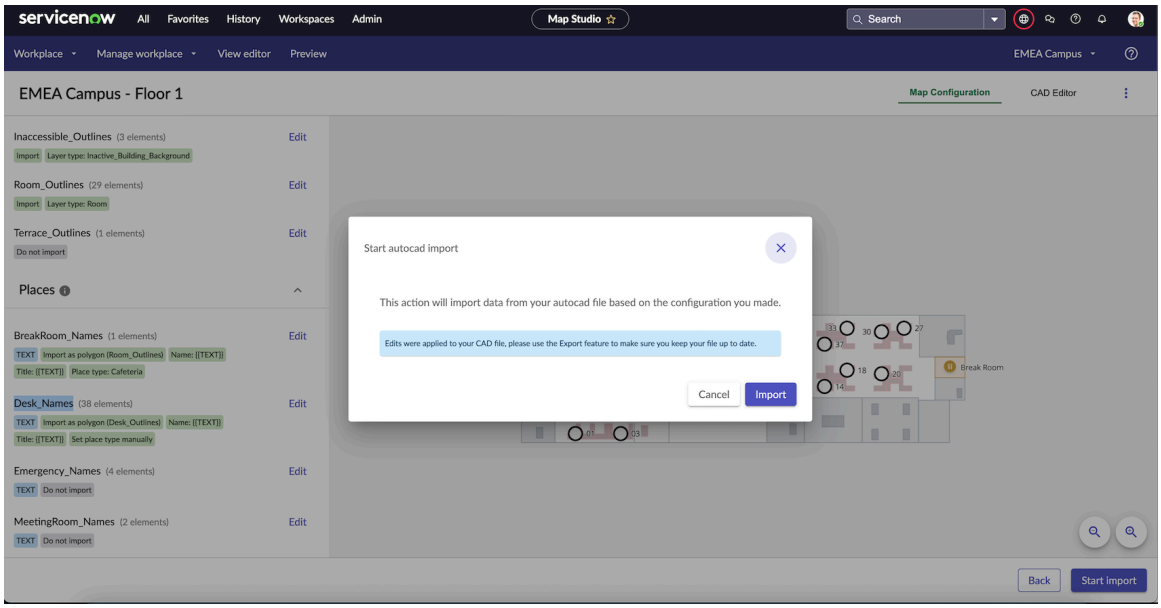
Procedure

1. On the Autocad configuration page, select **Start Import** to make sure your map is created.



   The **Start Import** button is enabled only when layers and places that you want to display on your CAD file don't have any issues like missing polygon, template, polylines. Resolve these issues before importing the layers and places in your CAD source file. For more information, see Configure CAD objects using the Map Configuration tab.

2. Select **Start Import**.

   The updated CAD configuration changes are imported to the Map studio for a floor plan. A message is displayed that the building configuration for a campus is complete.

3. **Optional:** Select **Go to overview** to navigate to the Map Studio Campus overview page.
4. **Optional:** Select **Continue** to view your updated changes in real time on a World map (OpenStreetMap).

Edit file settings

Modify the unit file settings of your CAD source file.

Before you begin

Role required: admin

Procedure

1. From the CAD Configuration home page, select the More actions menu (⋮).
2. Select **Manage source**.

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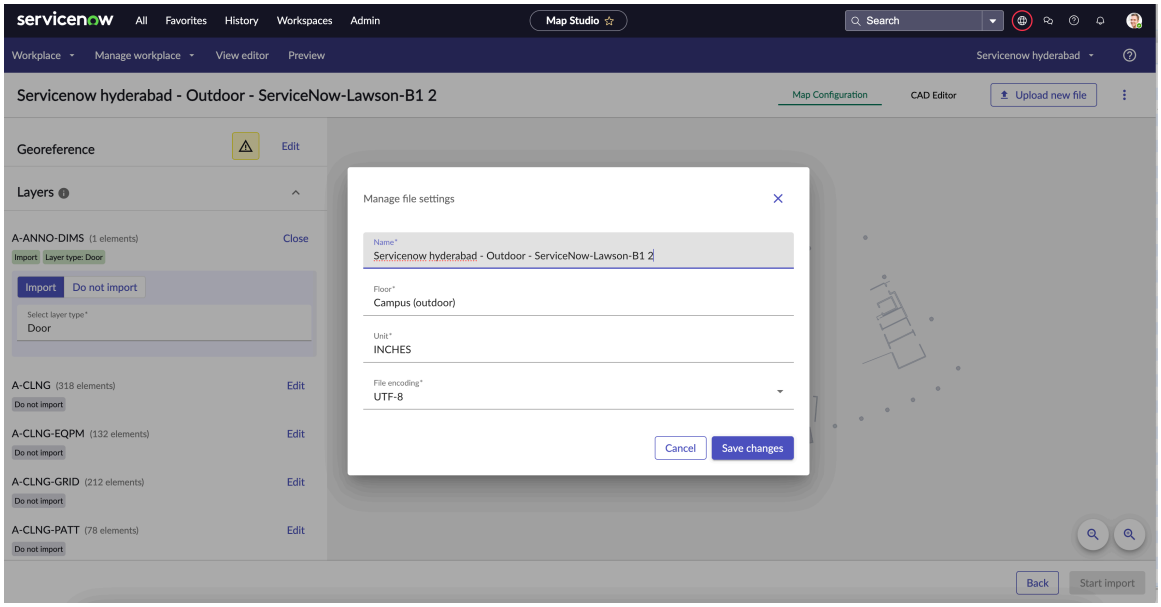

3. Complete the following information:
   - Floor: Name of a floor where you're configuring the CAD source plan.
   - Unit: The unit that appears in the field is the current file unit.

     If you want to change the file unit, select the required file unit size.
   - File encoding: Option to change or update your file encoding standard. Update the file encoding format only if there's an issue with the file encoding standard.

Bulk hierarchy upload

Use the Bulk hierarchy upload feature to import campus, building, and floor details by uploading Excel or CSV files.

As a map admin, you can use an Excel template to provide information like campus names, building names, floor details, and coordinates for multiple locations. After you upload the information, the system checks for errors and you can fix and reupload the file.

After uploading the hierarchical data, you can upload floor plans for all the locations. The locations are then displayed on a map based on the uploaded coordinates.

Download and fill Excel templates for bulk upload

Use an Excel template to provide information about your campuses, buildings, and floors.

Before you begin

Role required: sn_map_core.admin

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. On the **Bulk hierarchy upload** card, select **Upload hierarchy**.
3. In the Download Excel Templates section, download a template based on your requirement.
4. In the downloaded template file, fill in the information.

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For more information about the template columns, see Bulk upload Excel columns.

Important: You must use the precise latitude and longitude coordinates for your campus and building. For more information about getting precise coordinates, see Google Maps Help.

What to do next

After filling the Excel template files, you can upload them to your instance. You must upload the files in the following order: **Campus** > **Building** > **Floor**.

For more information about uploading the files to your instance, see Upload Excel files.

Upload Excel files

Import geographical data by uploading Excel files containing information about your campuses, buildings, and floors.

Before you begin

Make sure that you have downloaded and filled the Excel templates from the Map Studio. For more information, see Download and fill Excel templates for bulk upload.

Important: You must import the files in the following order: **Campus** > **Building** > **Floor**.

Role required: sn_map_core.admin

About this task

The Upload Excel files feature uses Import Sets to import the information from the Excel files. For more information about Import Sets, see the following resources:

- Import sets documentation
- Import Data ServiceNow® developer course

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. On the **Bulk hierarchy upload** card, select **Upload hierarchy**.
3. In the Upload Excel Files section, select **Upload hierarchy data**.
4. On the Load Data form, fill in the fields; make sure that you import the campus file first.
   For a description of the field values, see Load data form.

   Note: You can select a file from your instance by selecting **Data source** as the source of the import.

5. Select **Submit**.
   After the Excel file is processed, the system displays information or errors related to the import. You can fix the errors and reupload the file.
6. From the **Next steps** section, select **Run Transform**.
7. Select a map from the Available maps column, then select **Add**.
8. After selecting the transform maps that you want to run, select **Transform**.

   The transform maps run in the order that they're selected. After running the transform, you can view the import set for the loaded data.

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What to do next

You can repeat the procedure to import the Excel files for your buildings, and then your floors. After all the files are imported, you can upload the floor plans. For more information about uploading floor plans in bulk, see Upload CAD files.

Campuses and buildings are created based on precise geographical coordinates. You can preview your campus on the Map Studio after importing the files. For more information about viewing the map, see Map preview.

Upload CAD files

Import floor plans by uploading the CAD files in bulk.

Before you begin

Role required: sn_map_core.map_admin

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. On the **Bulk hierarchy upload** card, select **Upload hierarchy**.
3. In the Upload CAD Files section, select **Upload Floor Plans**.
4. On the Floor plan import group form, fill in the fields.
   For a description of the field values, see Floor map import group form.
5. Select **Submit**.
6. Attach CAD or PNG files to the record.
   For more information about attaching files to a record, see Manage attachments.
7. Select **Start Import**.
   The system creates import tasks based on the number of files attached to the record.

What to do next

- Work on the import tasks that are created for your import group. For more information about working on import tasks, see Work on an import task.

  After the import tasks are created, the Automate map updates AI agentic workflow is triggered for each task. The Map Admin Agent autonomously retrieves sources for the uploaded CAD file and resumes the import task. If the source isn't found, the agent moves the task to the `Waiting user input` state.

  For more information about the Automate map updates AI agentic workflow, see Automate map updates agentic workflow.

  Note: If you selected **Supervised AI execution** in the Floor map import group form, you must manually trigger the AI agent for every import task.

- You can auto-generate the georeference for an uploaded floor plan by navigating to the Autocad source, then selecting **Auto Generated Georeference** from the Configuration tab.

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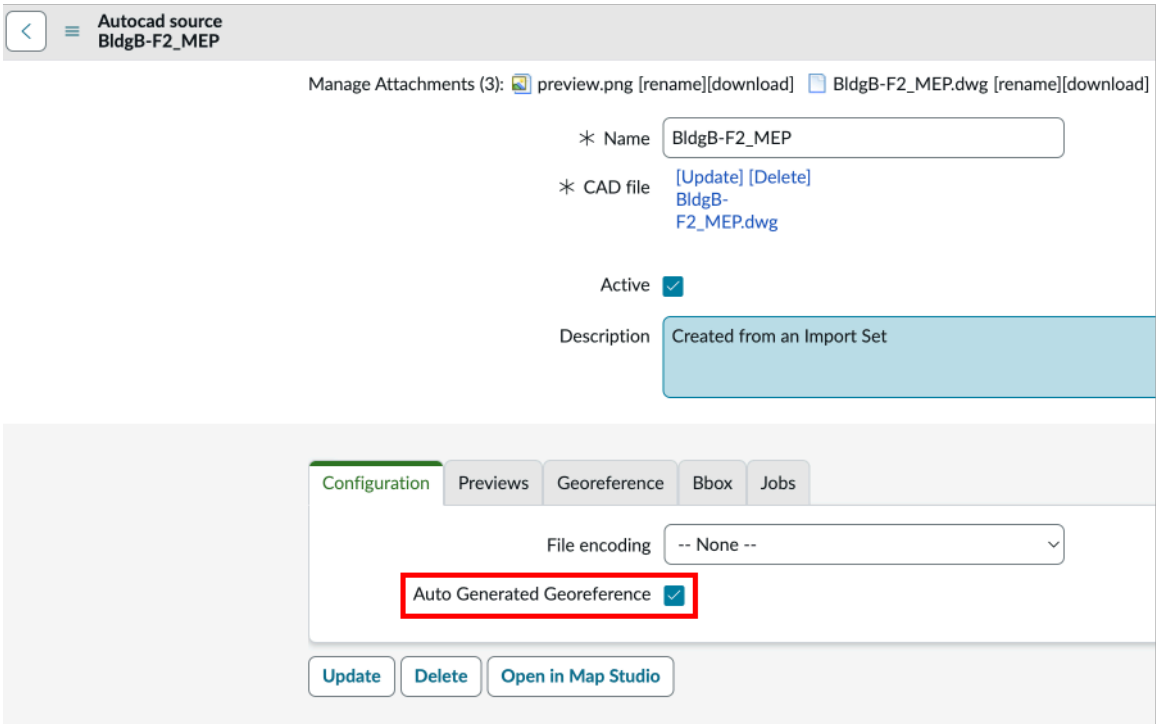

Note: The *sn_map_core.hide_outdoor_when_georeference_is_auto_generated* system property controls whether the world map is hidden when entering a building for floors with an auto-generated georeference.

Bulk update floor plans

Use the Bulk import feature to update floor plans by importing multiple CAD files.

Create an Import Group

Create an import group and use it to update floor plans in bulk.

Before you begin

Role required: sn_map_core.map_admin, sn_map_core.map_editor

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Bulk imports** > **Import Groups**.
   You can also navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. On the Floor plan import groups list, select **New**.

   Note: If you are in the Map Studio, select **Import files** on the **Bulk update maps** card.

3. On the Floor plan import group form, fill in the fields.
   For a description of the field values, see Floor map import group form.
4. Select **Submit**.
5. Attach CAD or PNG files to the record.
   For more information about attaching files to a record, see Manage attachments.
6. Select **Start Import**.
   The system creates import tasks based on the number of files attached to the record.

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What to do next

Work on the import tasks that are created for your import group. For more information about working on import tasks, see Work on an import task.

After the import tasks are created, the Automate map updates AI agentic workflow is triggered for each task. The Map Admin Agent autonomously retrieves sources for the uploaded CAD file and resumes the import task. If the source isn't found, the agent moves the task to the `Waiting user input` state.

For more information about the Automate map updates AI agentic workflow, see Automate map updates agentic workflow.

Note: If you selected **Supervised AI execution** in the Floor map import group form, you must manually trigger the AI agent for every import task.

Work on an import task

Select a source and resolve issues to complete the import task for a floor plan.

Before you begin

Role required: sn_map_core.map_admin, sn_map_core.map_editor

About this task

Import tasks are automated processes, but sometimes require your inputs. If an import task can't proceed without your input, the **State** field is set to `Waiting user input`.

The required input is based on the **Step** field and more information is added to the work notes of the record.

- Source retrieval: This step is required to link the CAD file to its source in the Workplace Service Delivery application.
- Georeference: This step is required to position and scale your source floor plan on the map.
- Configuration: This step is required to select the layers and place types for the floor plan.

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Bulk imports** > **Pending tasks**.
2. From the Floor plan import tasks list, select the task that you want to work on.
   You can also select an import task from the import group. For more information about import groups, see Create an Import Group.
3. If the import task is at the `Source retrieval` step, select a source for the import task.
   If the file name is the same as the source, the system automatically selects the source and moves to the next step. Otherwise, the Automate map updates agentic workflow is triggered to retrieve the source. The Map Admin Agent autonomously retrieves sources for the uploaded CAD file. If the correct source is found, the agent sets the source and resumes the task. If the source isn't found, the agent moves the task to the `Waiting user input` state.

   For more information about the Automate map updates AI agentic workflow, see Automate map updates agentic workflow.

   Note: If **Supervised AI execution** was selected while creating the import group, you must select **Trigger AI Agent** to trigger the Automate map updates agentic workflow.

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a. In the source field, select the source that is related to the attached source file.

Example
For example, if the source file A - `Floor3` . dwg is for the third floor of Building A, select `Building A- Floor 3` as the source.

b. Select **Continue**.

4. If the import task is at the `GeoReference` step, configure the GeoReference of the floor plan. If the GeoReference of the floor plan is already configured, the system automatically moves to the next step.

   a. Open the floor map by selecting **Open in Map Studio**.

   b. Set the GeoReference of the floor plan.
   For more information about setting the GeoReference, see Georeference your floor plan.

   c. Select **Continue**.

5. If the import task is at the `Configuration` step, configure the layers and places on the floor plan.
   If the layers and places are already configured, the system automatically moves to the next step.

   a. Open the floor map by selecting **Open in Map Studio**.

   b. Configure the layers and places on the floor plan.
   For more information about configuring layers and places, see the following topics:

   - Configure layers
   - Configure places

   c. Select **Continue**.

Compute CAD file properties to extract space or room surface area

Extract room and space dimensions from CAD files or Indoor Mapping Map Studio. Use the extracted properties in Workplace Service Delivery (WSD) space measurement table.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Space Mapping** > **Indoor Mapping Administration** > **Properties Mapping**.
   By default, the following properties are stored in the Indoor Mapping Properties Mapping table:
   - **CAD_COMPUTED_SURFACE_SQ_METERS**: If the polylines are defined as closed shapes or if a unit is set, compute the surface area automatically in square meters from the CAD polylines. By default, this property is set to **false**.
   - **CAD_COMPUTED_SURFACE_SQ_FEET**: If the polylines are defined as closed shapes or if a unit is set, compute the surface area automatically in square feet from the CAD polylines. By default, this property is set to **false**.

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- **INDOORMAP_COMPUTED_SURFACE_SQ._FEET**: Retrieve the **usable_size_sq_feet** from polygons in Indoor Mapping. Activate this property if your CAD file doesn't have closed shapes or if a unit isn't defined in the file. This property is also used for raster files (PNG). The scale in Indoor Mapping varies slightly depending on how the building was stretched during the georeferencing process. By default, this property is set to **true**.
- **INDOORMAP_COMPUTED_SURFACE_SQ_METERS**: Retrieve the **usable_size_sq_meter** from a CAD file for a surface area from polygons in Indoor Mapping. Activate this property if your CAD file doesn't have closed shapes or if a unit isn't defined in the file. This property is also used for raster files (PNG). The scale in Indoor Mapping varies slightly depending on how much the building was stretched during the georeferencing process. By default, this property is set to **true**.

  After activating, these properties are applied automatically during the synchronization process to your Indoor Mapping maps. The properties populate the useable square meters or square feet field of the Workplace Core space table by default. The space table form fields can be modified as required.

  Note: Select a value from the computed AutoCAD file or select a value that is available in the Indoor Mapping Map studio.

2. Select **New** to create a property.

   On the form, fill in the fields.

Indoor Mapping Place Properties Mapping form

Field	Description
Property	Name of the property as it appears in the AutoCAD file. For example: **CAPACITY**. This name cannot be changed.
WSD Space column	Table that is used for mapping a CAD property to a WSD space column when the Indoor Mapping map data is synchronized with Workplace Service Delivery. Select any value from the drop-down list. For example: **Capacity**.
Order	Option to specify an import order for each record in the CAD properties mapping table. The ordering is useful when there are two properties that must be placed in the same WSD space columns for two different files.
Active	Option to make a property active.
Domain	Option for domain separation. The default value is **global**.

3. Select **Submit**.
4. After importing the CAD source files, navigate to **Places** in the Map Studio menu.
5. Select to open a place.
   The Places panel opens in the edit mode. Notice that **Autocad properties** field is available. For more information, see Manage places.

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6. Make sure to synchronize your campus after adding a CAD property.

   For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.

7. Navigate to **All** > **Workplace Core** > **Campuses**.
   Add place properties mapping to a space in a campus if these properties aren't added to a space.
8. Select a Campus.
9. Select the personalized list columns icon () to move the required values from the Collection list to the available list.
10. Select **OK**.
11. Spaces available in a campus are updated with the selected values after a CAD file is imported in the Map Studio and after the Indoor Mapping synchronization process is complete.

Compute Autocad floor surface area

Compute floor size area and dimensions in Indoor Mapping Map Studio while importing your AutoCAD floor sources.

Before you begin

The computed floor size area measurements in Indoor Mapping are available in the Workplace Core Floor table form with pre-filled field values. For example, **Total Square feet**, **Usable Square feet**.

Role required: admin

Procedure

1. To compute the Floor size area from an AutoCAD file, activate the floor size computation property.
   a. Navigate to **All** > **Indoor Mapping** > **Indoor Mapping Properties**.
   b. Enable editing and set the property **Set true to activate floor size computation** to true.
   c. Click **Save**.
2. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
3. Select a campus for which you want to compute the floor surface area.

   For example: Demo Campus.

4. Select a Building in the Map Studio.
5. Select **Manage Workplace** > **Floor & Floorplans**.
6. Select a floor plan and select **Configure**.
7. In the AutoCAD source page, select the **Use for floor surface area calculation** from the list optionsx.

   The **Use for floor surface area calculation** option is only visible after you have enabled the floor size computation property as shown in Step 1.

   Note: It's optional and not mandatory to select a **Layer** while selecting the **Use for floor surface area calculation** option.

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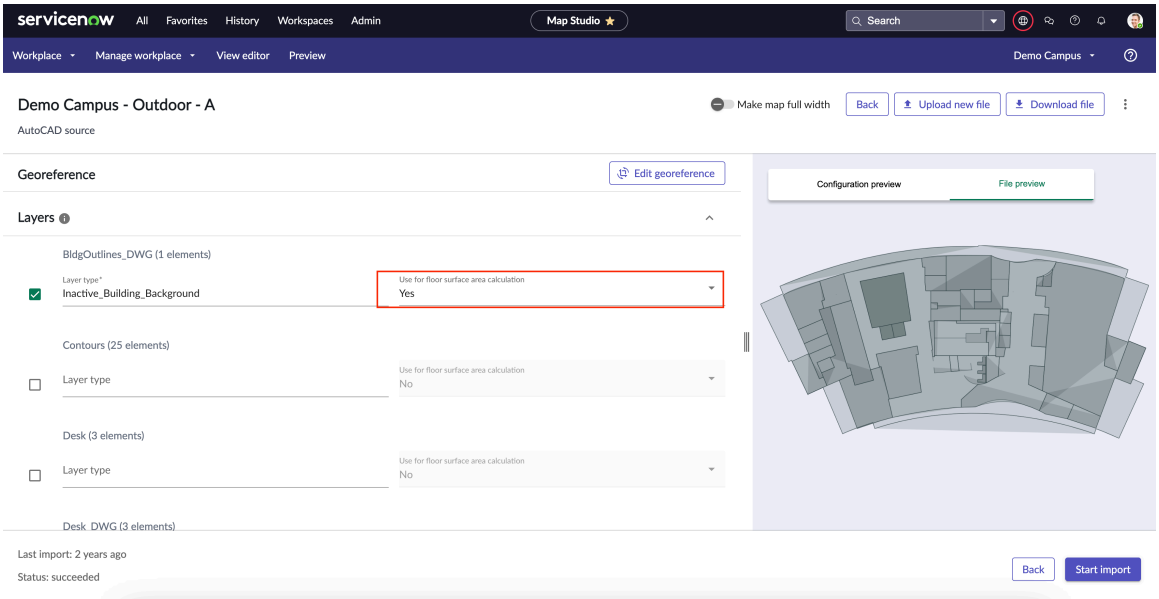

8. Select a **Layer** that represents the outline of the floor to compute the floor surface area value.

   The layer for which **Use for floor surface area calculation** computation is selected is used for the floor surface area calculation.

   Note: Only one layer can be selected at a time. Ensure that the selected layer has closed polylines.

9. Select **File Preview** to preview and verify if the polylines are closed for a selected layer.

   If in case, the selected Floor layer has several closed polylines, then the biggest polyline is used.

   a. Select **Yes** from the drop-down list.

10. Select **Start Import** to import the CAD floor source plan.

    The computed floor surface area value is stored in the Floor configuration on the Map Studio.

11. Navigate to **All** > **Space Mapping** > **Properties Mapping**.
    This will push the computed floor surface area value from the Map Studio to the Workplace Core Floor table form.

12. On the Indoor Place Properties Mapping page, Click **New** and fill in the form fields:

    Note: This step needs to be only configured once.

Indoor Place Properties Mapping form

Field	Description
Property	Name of the property. For example:**CAD_COMPUTED_SURFACE_SQ_FEET** and **CAD_COMPUTED_SURFACE_SQ_METERS**.

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Field	Description
	Note: Name of the property cannot be modified or edited. The property name must be same as what you have used in your AutoCAD file as a label.
WSD table	The table where you want to populate or place the property. Select **Floor** from the drop-down list to compute the floor surface area value in the Floor table.
WSD field	The field where you want the floor surface area to be auto-populated. Select **Total Square feet** or **Usable Square feet**.
Order	You can keep the order as 0.
Active	When this option is not selected, your property will be automatically deactivated on your different maps. Select this option to activate the property.
Domain	Default value is **Global**. Retain **Global** to avoid any conflicts between your different applications.

13. Click **Update**.
14. Navigate to **All** > **Space Mapping** > **Indoor Map/WSD Synhronizations** to run the Synchronization script to update the selected floor with the updated property.
15. Select a campus.

    The synchronization script syncs the newly added computed floor surface area fields on the Floor table.

16. Navigate to **All** > **Workplace Core** > **Space Administration** > **Floors**.
17. Select the Floor for which you computed the surface area value and verify the Measurement Details section.

    For example, the following field values will be pre-filled depending on user configuration:

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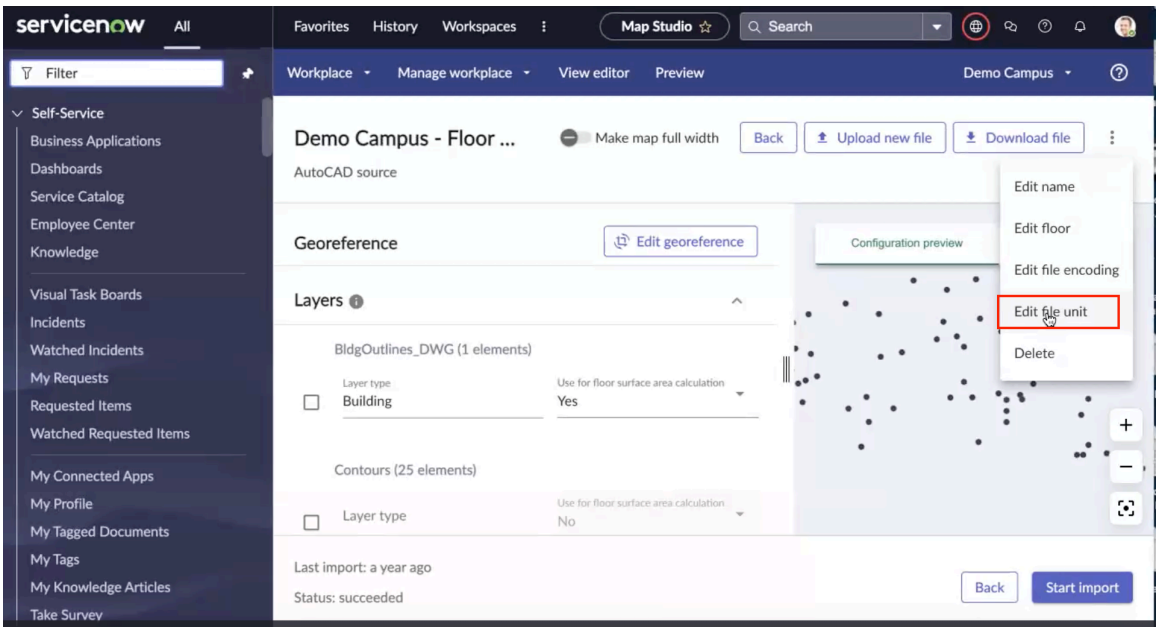
a. Total square feet: The floor surface area value is auto-populated.

b. Usable Square Feet: The floor surface area value of the floor is auto-populated.

Note: If the CAD values are incorrect or empty when you are importing the CAD file in the Map studio, it is most likely that the CAD file did not have a unit or may have an incorrect unit. In such cases, CAD file conversions in the Map Studio are not accurate.

The CAD file unit value can be computed correctly in the Map Studio based on the AutoCAD file coordinates. Navigate back to the CAD file configuration page for a floor plan and perform the following;

- Select the More actions icon (⋮) on the top right pane of the Map Studio.
- Select the **Edit file unit** option.



- Select a unit from the drop-down list.

  For example; Feet.

- Click **Save**.
- Click **Start Import** and run the synchronization again.

  For more information, see Synchronize Indoor Mapping with Workplace Service Delivery.

  The conversions are now accurate.

Raster file requirements

Raster files are flat files and therefore, design and places have to be manually created. Raster floor plan files must meet the Map Studio import requirements.

If you are importing a raster image (PNG) source, the designs and place creation process must be performed manually in a graphic designer tool. For example: Adobe Illustrator. Currently, only PNG file formats are supported.

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Note: Map administrators must ensure that the floor plan sources adhere to the import requirements of Indoor Mapping. Before importing, ensure that the raster image (PNG) sources are reviewed by graphic designers for design corrections and accuracy. Import of JSON/GEOJSON files is only available for third-party mapping providers migration.

For more information about raster file import requirements, see ServiceNow Blog.

Raster design requirements

Design properties	Requirements
Floor plan proportions	• Ensure that your design studio Artboard has 20,000 x 20,000 pixels ratio for optimal image rendering. • Ensure that the floor plan occupies the complete Artboard in your design studio. Image quality is based on the Artboard size. If the floor plan does not fit the whole Artboard, then, the final size is reduced and may get pixelated. • Verify that the building is at scale to match the real building proportion and shape on the outdoor map. If the building proportions are not accurate, time, and distances for directions are not accurate.
Design	• Redesign your floor plan for ease of use. Floor plans must be as simple as possible so that end users can easily understand the map. • Ensure that all text objects are removed from the raster image file. Text objects are not supported on the PNG file for floor plans. **Note:** Places for spaces are added to describe places on a map. Therefore, text objects on a map can be confusing to end users. • Remove the image borders. All the spaces around a building must be removed or made transparent.
Export	Export the image file with the following requirements:

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Raster design requirements (continued)

Design properties	Requirements
	• Type: Currently, only PNG and JPEG raster image sources are supported in Indoor Mapping. • Size: Image file must not exceed 50 MB. • Dimensions: Image dimension must be 20,000 x 20,000 pixels.

Import Raster files

After creating your campus, buildings, and floor, upload and import the raster floor plan sources.

Before you begin

For more information about raster source file requirements, Raster file requirements.

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus.
3. Select **Manage workplace** > **Floor and Floorplans**.
4. Select the floor that you have created and click **Upload file**.
5. Select the raster file that you want to import for the floor plan.
6. Before uploading the raster file, you can edit the name of the source.
   By default, the name of the source is <campus name-floor title-file name>.
7. Ensure that the correct floor name or level is selected.
8. Click **Save**.
9. After uploading the file (uploading may take few minutes to complete), you will see the preview of the floor plan at the top of the screen.
10. The next steps to configure the raster file are displayed.
11. Edit georeferences and use the two purple pins to set to scale your floor plan by dragging and moving the pins to fit the building shape on the World map.
12. Click on the pins, the color changes to pink and you can change the position.
13. Click and hold any of the pins to change its position.

> **Note:** It is important that you set your floor plan to scale as this will help in wayfinding and getting directions. The directions show the exact time and distance between points. For example: Point A and point B.

14. Select the layer type of the file that you are importing.
    Layer types must be configured beforehand while you are setting up your default values.
15. After completing Steps 11 and 12, select **Start Import** to import the raster source file.
16. After the floor plan is imported, click **Continue**.
    Alternatively, you can also navigate to **Manage Workplace** > **Places**.

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You are redirected to Places.

Note: Raster files are flat files and therefore, places have to be created manually.

Manage map objects and data

Manage the map objects and map data from the Map Studio interface. Customize your maps as often as required.

In the Map Studio, manage and edit map objects and map data. Upload CAD and raster image file sources, configure your architectural diagrams and import back to the Map studio to have great looking maps. Create views, places, direction graphs, and migrate data to another instance using the snapshots capability.

Create a campus with buildings and floors

Create your first Indoor Mapping campus and add a few buildings and floors to it using the Indoor Mapping Map Studio. Import your CAD and raster image source files to complete your campus configuration.

Before you begin

Install Indoor Mapping and configure basic information about your campus, building, or floors in the Map Studio by importing the floor plan sources.

Note: Upload and Import AutoCAD (DWF or DXF) or raster image (PNG) source files in the Map Studio.

Before you begin to use the Map Studio, ensure that your floor plans meet the following guidelines:

- AutoCAD requirements
- Raster requirements

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Additionally, if you have existing campuses, you can search for a campus on the Map Studio home page.
   a. Select the **Search** icon ( ) to search for a campus that you want to update or switch to.
3. To create a campus, select the **Get Started** tab.
   On the form, fill in the fields.

Add an Address

Field	Description
Country	Country or region where the campus is located.
Campus Name	Name of the campus.
Address	Precise campus location address as it appears on the map.

4. **Optional:** Select **Edit** to edit the campus name and address.

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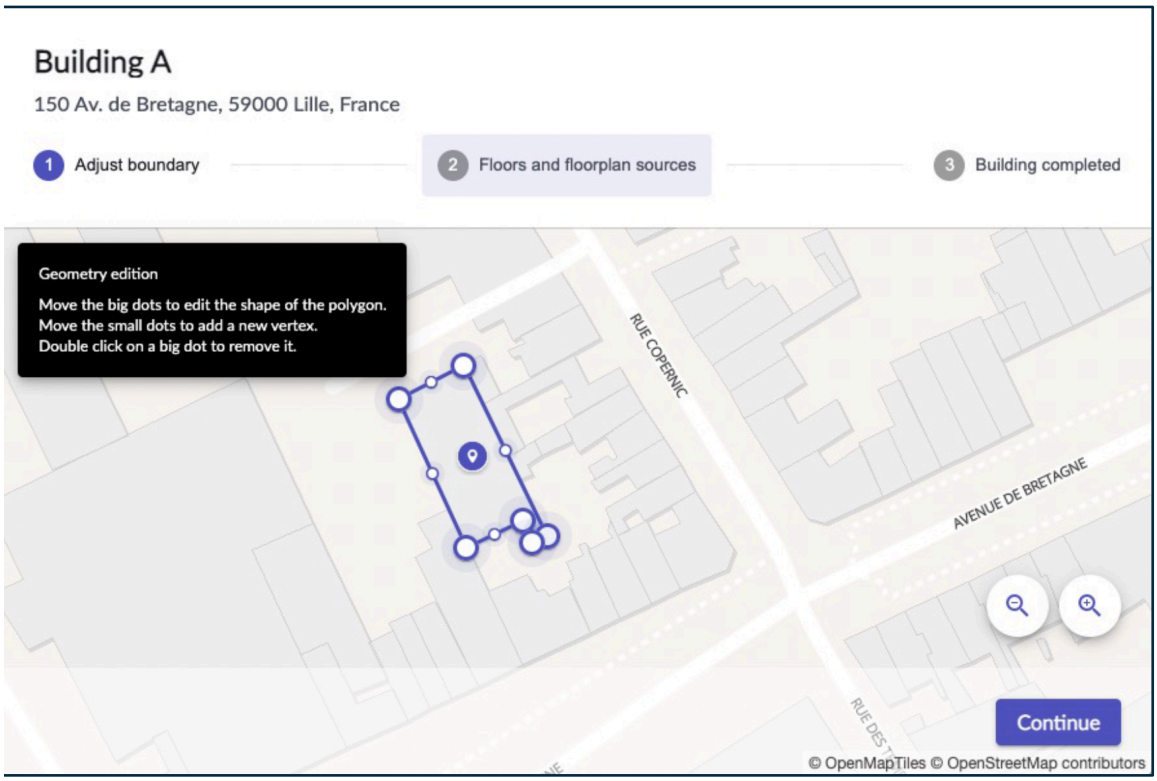
5. Select **Continue** to add your first building.
6. Provide the building name.
   Building address is pr-efilled.
7. Click **Continue**.
8. Enter the name of the building and address.
9. Click **Save**.

   Building boundaries are computed automatically.

10. **Optional:** In case, if you cannot find your newly created building on the map, you will see the following screen:



11. Select **Continue**.

> **Note:** Your polygon must be at least around the building. It doesn't need to match the exact shape of the building.

12. At this stage, you can add additional buildings or edit the existing building details.
13. Select **+Add a building** to create additional buildings in your campus.
14. Navigate to **Manage Workplace** > **Floor & Floorplans** to add a floor or floors to your building.
15. Select your building.

> **Note:** Ensure to select a building as you can upload files at the Campus level. If you select a building, it will be visible at every levels as you can only import your files at the Outdoor level.

16. Select **Add a floor**.
    On the form, fill in the fields

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Add a floor

Field	Description
Building	Building name or number where the floor is located.
Number	Floor level. Takes an integer or a numerical value.
Name	Floor name or title
Title	Title displayed on the floor controller.

17. Click **Create**.
18. Repeat Steps 16-18 for each floor of your building.
19. Navigate to '**Manage Workplace** > **Campus and buildings**.
    It is important that your campus encompasses or its boundaries are well adjusted for all buildings. The boundaries are automatically adjusted. For more information, see Working with boundary editor.
    Your campus is configured.
20. After your campus and buildings are created, you can start importing your CAD files or raster image floor plan source files.
21. In the Map Studio, navigate to **Manage workplace** > **Floors and Floor plans**.
22. Locate your floor where you want to upload your CAD or raster file.

    (Optional) At this stage, floor plans can be uploaded and imported as AutoCAD (DXF/DWG) or raster image file (PNG) sources or you can import the files after creating a campus. Ensure that you've reviewed the design guidelines before importing the sources to the Map Studio. For more information about how to import, see Import CAD files to Map Studio and Import Raster files.

23. After importing a CAD or raster file, select **Manage Workplace** and select **Overview**.
24. Select the building that you created.
    Your map is configured and available on the Map Studio.

Working with boundary editor

Boundary editor helps to define the mapped area of a campus on the global map by adjusting the campus boundaries to visualize the location of a campus and building on a map. Boundaries are used to differentiate between outdoor maps and indoor mapped areas.

Before you begin

Floor plans, places, and directions must be within the boundaries in order to be properly displayed. If the boundaries were automatically computed by the system, you can uncheck **Auto compute boundary** to modify the boundaries.

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a Campus.

   The campus is displayed on Map studio.

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3. Navigate to **Manage Workplace**, **Campus & Buildings**.
4. Adjust or change the boundary of a campus, if changes or updates were made to the campus, and if places, floor plans or directions are now out of the initial boundary set during the campus creation.
   a. Ensure that the campus is selected on the left panel.
   b. Move the big dots on the campus or building boundary to edit the shape of a polygon.
   c. Move the small dots to add a new vertex.
   d. Double-click on a big dot to remove it
5. Click **Save boundary** to save the changes.
   The **Save boundary** button is enabled when some changes are made to the campus or map objects boundary.
6. You can also change or adjust the building boundaries if updates or modifications were made, and if floor plans or directions are now outside of the original building boundary.
   a. On the left panel, make sure the building is selected.
   b. Move the big dots on a building to edit the shape of a polygon, and move the small dots to add a new vertex.
   c. Double-click on a big dot on the polygon to remove it.
   d. Click **Save boundary** after adjusting campus boundaries.

   The **Auto compute boundary** option is also available adjacent to the **Save boundary** button for both campus and building boundaries.

   (Enabled by default) Enabling this option helps to automatically adjust the boundaries when new floor plans, places, or directions are added and they are outside of their initial boundaries. When this option is enabled, the boundaries cannot be manually adjusted. Disable it to manually adjust the building boundaries.

Import outdoor elements

Import outdoor elements that you want to display on the indoor map. This can be a graphic element such as a logo or a an outdoor parking lot with parking spaces that needs to be created as Places.

Before you begin

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus to add to your outdoor layer.
3. Navigate to **Manage Workplace** > **Floor & Floorplans**.
4. Add a new source and select the file you would like to import.

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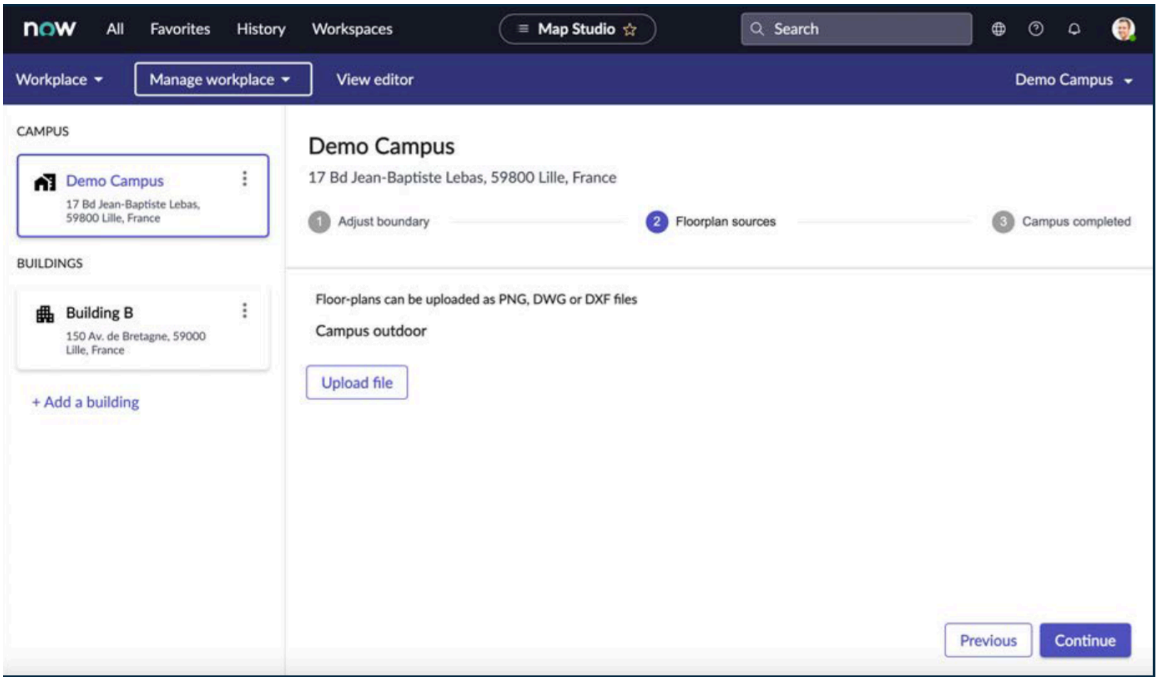
Add outdoor elements



5. Click **Continue**.
6. Configure the raster source file.
7. Edit the georeference.
   For more information about editing georeferences, see Import Raster files.
8. Select the layer type.
9. Click **Start Import**.
10. Create a place on your campus by selecting **New point** or **New polygon**.
    For more information about creating a polygon and point, see Manage places.
11. Make sure that you select the floor on a campus.
12. Start creating directions.
    For more information, see Manage Directions.

Manage places

Edit campus and buildings to add places, icons, and place types that you want to display on the indoor maps.

Before you begin

Place Types are used to define a physical location on your map, it can be a polygon or a point depending on if a place corresponds to a room or just a place in your map. Places are linked to place types and are used to categorize the different places on your map (example: meeting room, office, printer, parks, staircase, elevators, etc). Places also have markers showing the place title.

Note: Places can either be automatically generated by a CAD import or have to be manually created with a raster import. For more information, see Import Raster files and Import CAD files to Map Studio.

Role required: map admin, map editor, map editor limited

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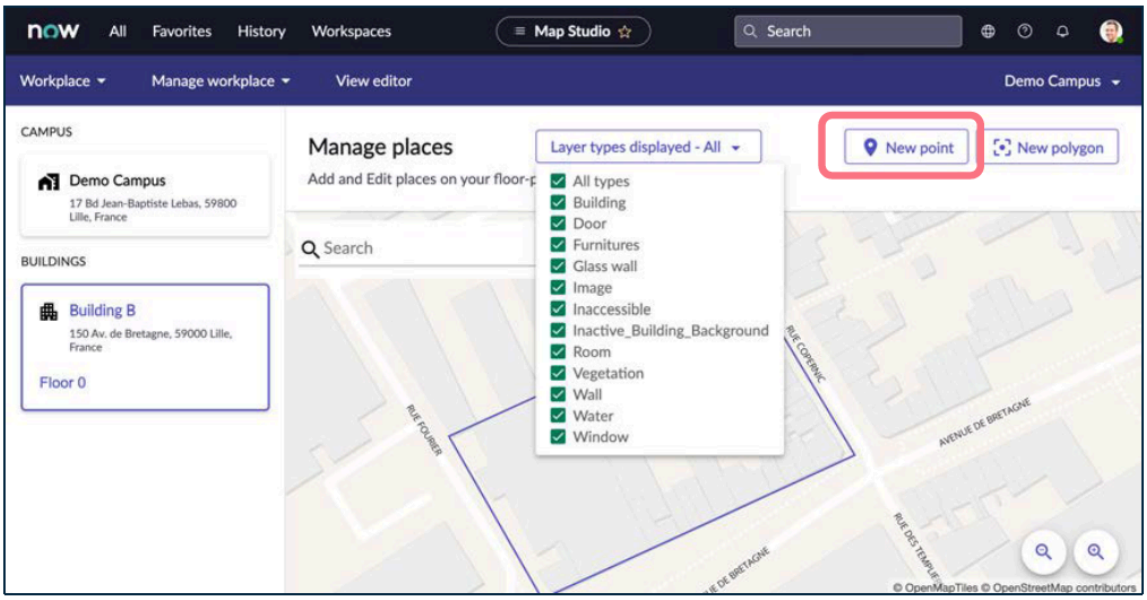
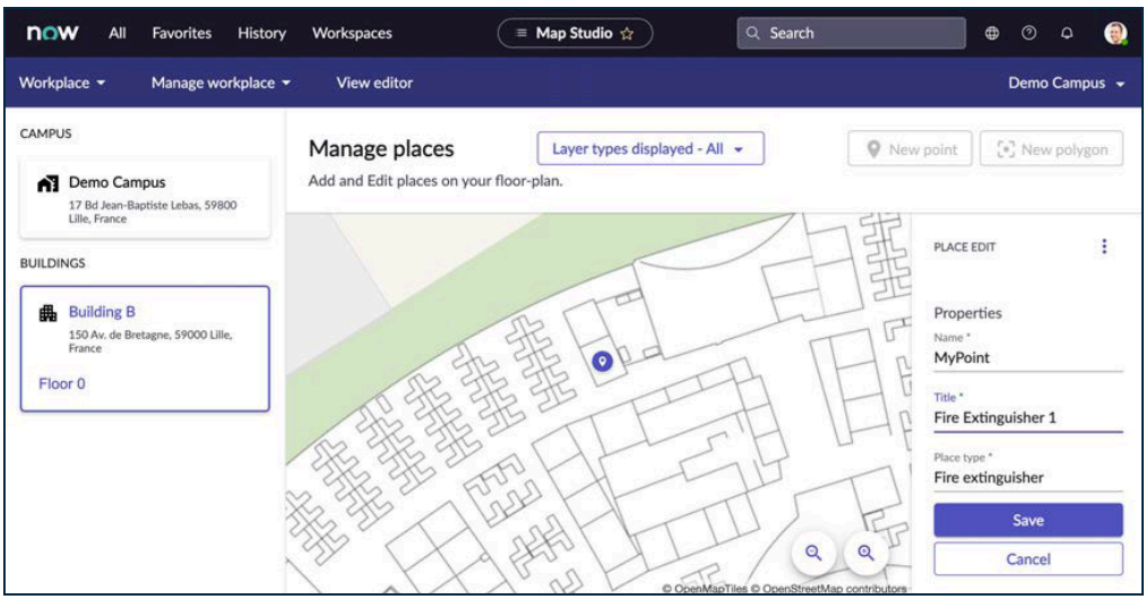
Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus.
   The campus opens in the Map Studio home page.
3. To edit and manage places, select a building.
4. On the map menu, select **Manage Places**.
5. Select the floor on which you want your places to display on your maps.
6. Click **New point** or **New polygon** to start creating places and new points of interest.
7. Select **New point**.

Create a new Point





8. Click on the map to position the point.

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On the form, fill in the form fields

Place edit panel

Name	Label name for a space. **Note:** Use a unique name for each space for ease of identifying the spaces on a map (not visible to the end user).
Title	Title displayed on the map.
Place type	Place Types are used to categorize Places (example, Meeting rooms, Desks, etc.). It also provides a default Icon which can be customized later in the view editor.
Floor	Floor to which places and place types are added.

Note: If places in a CAD file are configured using the Autocad Import tool (Indoor Mapping v.18.0), only the **Place type** field is editable in the Place edit panel. The **Name**, **Title**, and **Floor** are read-only fields. For more information, see Configure places.

9. Select **New polygon** to add polygons or points respectively.
10. Click on the map to draw a polygon for a place, and close the polygon by clicking on the blue point or dot.
    Polygons can be used when you do not have a building in campus.
11. Make sure you close the shape by completing or ending the creation back on the first point.

    On the form, fill in the fields

Place edit

Field	Description
Name	Label name to identify a specific place (not visible to the end user).
Title	Title as it appears on the map.
Place type	Place Types name. The place types are used to define a physical location on your map, it can be a polygon or a point depending on if this place corresponds to a room or just a place in your map (cafeteria, booth, elevator, auditorium, etc).
Floor	Floor names. The places and place types are created for a selected floor.
Add a Marker	Marker on the map. Add a marker to see the location pin on the map. Markers define the icon (image) of place and identifies a location on your map.

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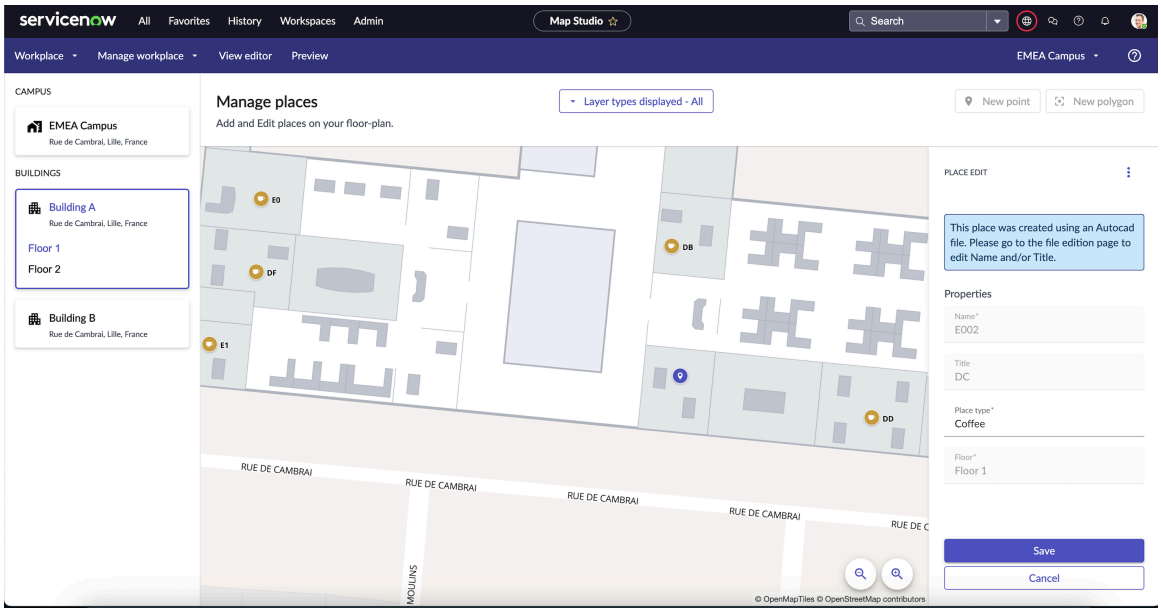
Field	Description
Add an Entrance	Entrance to a room is used by the wayfinding application. If you add an entrance, your pathway stops at the entrance.

12. **Optional:** Select a place (configured using the CAD configuration page) to open the place editing panel.

    (Optional) Notice that the **Name**, **Title**, and **Floor** are read-only fields and cannot be edited. Only the **Place type** field can edited. A validation message is displayed to inform that the selected place was created using an Autocad file. These fields can be edited in the Autocad Configuration page (Indoor Mapping v 1.8.0). For more information, see Autocad import tool and Configure places.



13. Click **Save**.

14. To switch from a point to a polygon, click the other options icon (⋮) on the Place Edit panel and select **Switch to a polygon**.

    When you select a place, the Place Edit panel shows the CAD file properties such as room, capacity, etc. The AutoCAD properties are stored in a dedicated table **sn_map_core_place_properties**. For more information, see Compute CAD file properties to extract space or room surface area.

    The Indoor Mapping application provides the ability to extract room dimension from CAD files and to use it in Workplace Service Delivery rooms and space measurements.

Create Indoor Mapping icons and place types

To manage places and place types in Indoor Mapping Map Studio, start with creating icons for places, and then create a place type.

Before you begin

Indoor Mapping place icons are used for places and to define what you see on your map. The icons are also used to style your place types. Place type sure used to categorize places. You can show or decide not to display places in a view. Place types have the following:

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- Name
- Icon
- Color (in case of a polygon)

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **icons**.
   The Indoor Mapping icons page appears. To edit an existing icon select an icon and apply your edits.
2. Select **New** to create new icons.
3. Complete the following information on the new icon record page:

   a. **Name**: Name of the icon.

   b. **Image file**: Select and add an image file to be used as icon image.

   c. **Title**: Image title to download the icon as a PNG file.

      The size of the image is automatically adjusted to right size and shape by the Indoor Mapping Map Studio.

   d. **Active**: The icon must be active to appear in the studio and on your building to add value and differentiate your place types on the map.

4. Click **Update**.
   The new icon for Indoor Mapping place type is created.
5. After creating the icons, you need to create the Place Types.

   Place Types are displayed with your Icon on the Map Studio to differentiate places on the map.

6. Navigate to **All** > **Indoor Mapping** > **Place Types**.
7. Select **New** to create a new Place Type record.

   On the form, fill in the fields

Place type

Field	Description
Name	Define the name of the place type.
Default marker icon	Search and select the required icon from the list.
Default stroke color	Color you want the Place Type to display on the Map Studio. Put the hash (#) symbol for the hexadecimal color for Map Studio to recognize and differentiate (Only available for polygons). For example: #008000 for Green color.

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Field	Description
Default stroke opacity	For the opacity, select a range between 0 and 1 (Only available for polygons) Here '0' denotes transparent and '1 'denotes opaque.
Default stroke width	The thickness of the outline or stroke of your place type.
Default polygon display	This option is enabled by default. Clear the selection if you want the place type to appear as a point on the map. A polygon will present the surface of a room, for example, meeting rooms or any other closed room. The point is used to represent a place that is not fixed or to represent a place that is not in a closed room like a resting place or a telephone.
Default title display	Option to display the title of the place type on the Map Studio.
Default marker display	Select this option to display the icon of your place type on the Map Studio.
Active	Option to activate or deactivate or turn off the place types on maps. Turning off the place type will not remove the place type. It will be just inactive on your map, and there will be no points of interest in the map.

8. Click **Submit**.
   After the settings are saved, you can see the list of campuses and buildings for which the place type is active.
9. To set up your new Place Type, navigate to **All** > **Indoor Mapping** > **Map Studio.**
10. Select a campus and select **Manage places** to add and edit places.
    For more information, see Manage places and Edit with view editor.

Manage Directions

Directions are used to compute routes from point A to point B on the map. Map administrators can manually draw lines on the floor map areas where people are allowed to walk within a building. This cannot be automated and has to be done manually.

Before you begin

Role required: map admin, map editor, map editor limited

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Procedure

1. Two direction modes (**Accessible** and **Default**) are enabled by default in Indoor Mapping.
   - **Accessible:** This mode is for users with reduced mobility and so by default, the stairs and escalators are inactive, while elevators and ramps are added.
   - **Default**: Configured for general public and pedestrians.
2. New direction modes require icons.
   For more information, see Create Indoor Mapping icons and place types
3. To create a new direction mode, navigate to **All** > **Indoor Mapping** > **Direction modes**.

   On the form, fill in the fields

   New Direction modes

Field	Description
Name	Direction mode name.
Title	Direction mode title will be displayed on the map studio when you select the direction mode of a direction.
Icon	Select an icon from the list.
Average speed	Average speed for the type of transportation used.
Active	Option to activate the direction mode on the map. **Note:** Turning off the direction mode does not remove it's just made inactive on your map and the directions will not be shown on the map.

4. Click **Submit**.
   The newly added direction mode is available in the list.

   Note: On the direction mode record, select **Route to direction mode associations** to find the list of campuses and buildings for which the direction mode is active.

5. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
6. Select a campus.
7. Go to **Manage Workplace**, select **Directions**.
   Alternatively, select **Manage Directions** from the Map Studio menu.
8. Select a building and floors where you want to add the directions to edit.
9. From the **Direction modes** drop-down list, select a direction mode from the available options:
   - **All modes**
   - **Accessible**
   - **Default**
10. To draw directions from one point to another, select **Draw** and begin drawing routes along all the hallways for each floor.

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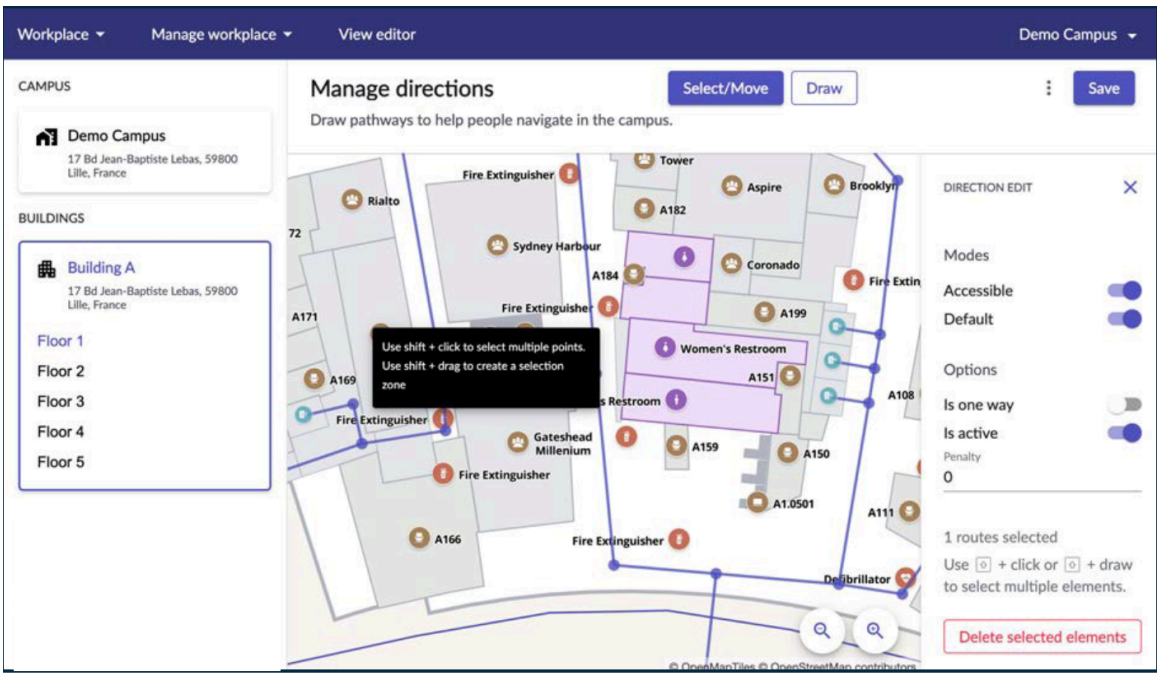
Note: Lines must be straight as they are used by the wayfinding application to display routes within a building.

All segments created are by default set to Active, this state can be edited at any time on the Studio to reflect any changes (incidents, renovation, and so on). Change the state by selecting the toggle option **Active** or **Inactive**.

Draw directions



11. To stop drawing, select **Select/Move** or press **esc** (escape) on the keyboard.
    All segments that are created are by default set to **Active**. The Active state can be edited any time on the Map Studio to reflect any changes (incidents, renovations, etc.).
12. To change the state, click the toggle option **Active** or **Inactive**.
    States help the wayfinding application to calculate a similar route without going through the inactive routes or segments.
13. Use the **All modes** option to use segment in both ways **Accessible** or **Default**.
    You can also change it to enable only one-way directions.
14. Select a way and define in which way the segment can be used.
15. Small arrows appear on the map.
    The route with the selected direction mode is highlighted on the map.
16. Each of the segments of the direction graph can be edited.
17. By default, both default and accessible modes are shown as active on each segment.
18. Once the direction graph is complete, make sure you clearly identify the connectors to link your floors together.
    For more information, see Create a connector type.
19. Select the **Display settings** icon adjacent to the **Save** button.
20. Select **Connector links**.
21. Select the node that represents a connector and ensure that the correct building is selected.
    For more information, see Create a connector type.

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22. After creating the connectors, link additional floors of your building together.
23. Select the node and ensure that you link it with the same node you have created for the same connector.
24. After creating direction graphs for every floor in a building, repeat the process to add a graph on the campus.
25. Ensure you link two graphs by connecting the two end nodes.
26. Click **Save**.
27. To unlink a connector, select **Detach connector**.
28. Select **Place entrances** from Display settings to display the place entrances for a selected campus or building.
    This option displays on the map where the entrance is located and the point or points that are going to be used by graph directions as start points.
29. Select **System generated paths to entrances** from Display settings:
    This option is used to connect place entrances connect to a generated path. The paths marked in green show system generated paths. Users do not have draw manually. The application automatically computes paths from an entrance.
30. Click **Save**.
31. Click the other options icon ( ).
32. Select **Copy directions**.

    This option helps in mapping or copying directions where several floors have the same layout. You can also reuse directions defined for a previous floor. For more information, see Copy direction graphs to multiple floors.
33. Click **Save** to save all your changes.
34. After editing the directions, you must activate the direction mode in the map View Editor so that it is available for all map users.
35. Select **View Editor** on the Campus menu and click **Edit.**
36. After making the required changes, click **Save**.
37. If you want to remove a content, select it and click **Delete**.

Create a connector type

Create connectors (stairs, elevators, escalators, ramps) and activate the connector type in the View editor. Connector Type contains the style (icon) and properties for each connector.

Before you begin

Indoor Mapping provides Connector Types that are enabled by default. You can create a new connector type depending on your requirement.

Role required: map admin, map editor, map editor limited

Procedure

1. To create an icon for your connector type, navigate to **All** > **Indoor Mapping** > **Icons**.
   Indoor Mapping provides a pre-existing icon library. To edit an existing icon, select an icon record and apply your edits. For more information, see Create Indoor Mapping icons and place types.
2. After creating your icon, navigate to **All** > **Indoor Mapping** > **Connector types**.
   You can edit an existing connector type by selecting the record and applying your edits.

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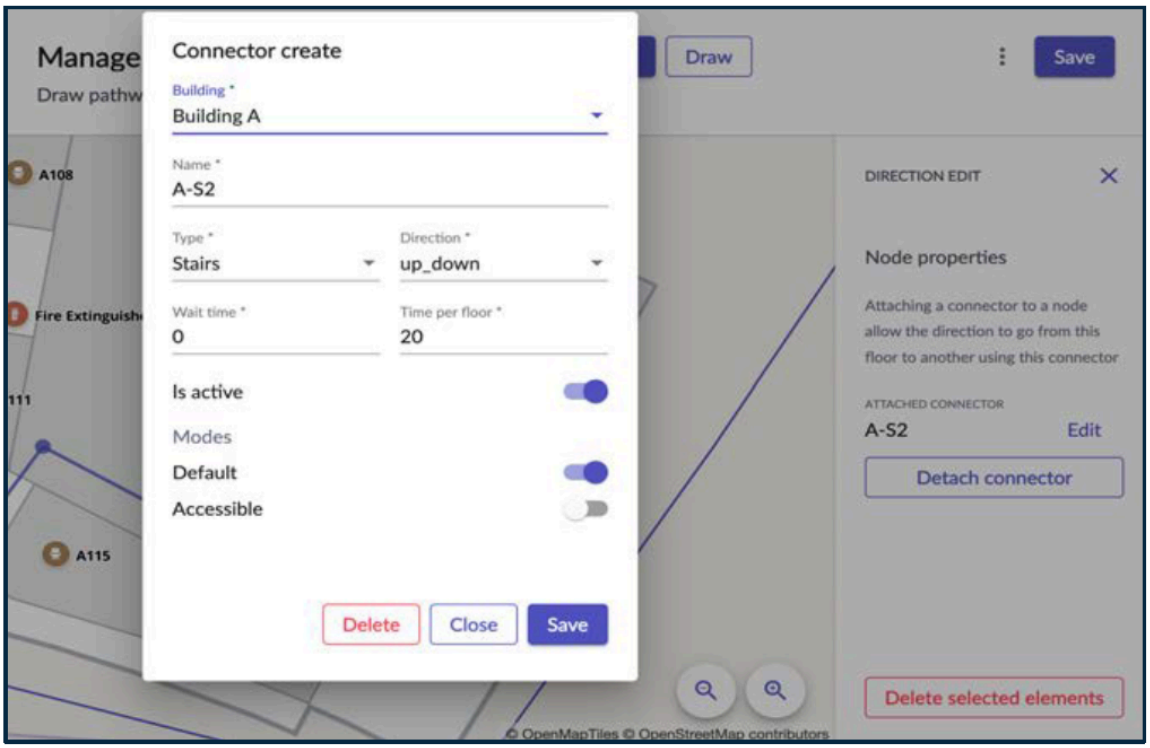
3. Select **New** to create a new connector type.

Create connectors





On the form, fill in the fields.

Connector create

Field	Description
Name	Name of the connector type. For example: Elevator

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Field	Description
	The Name will be displayed in the drop-down list when you create a new connector in Map Studio.
Default wait time	Indicate the default wait time. For example: 30
Default time per floor	Default time per floor. For example: 5
Default marker icon	You must search and select the icon type for the connector For example: Elevator
Active	Option to make the connector type active. If you clear the check box, then your connector type will be automatically deactivated on your different maps. **Note:** Turning off the connector type does not remove it. It will be made inactive on your map and there will be no connector display on your maps until it is activated again.
Default order	Specify the default order for the connector type.
Default maximum zoom	Default value is 23.
Default minimum zoom	Default value is 15.
Default marker display	Option to select the default marker display.
Default direction	Select any of the following from the drop-down list: ○ Up ○ Down ○ Up and down

4. Click **Submit**.
   The new connector type is available on the Connector types page.
5. To activate the connector type in the View editor so that it is available for all your buildings, navigate to **All** > **Indoor Mapping** > **Map Studio**.
6. Select a campus, and on the Map Studio menu, select **View Editor**.
7. From the View Editor content panel on the left pane, select **+Add Connector** to add the newly added connector.
8. Select the connector type that you added in Step 3.
9. Click **Apply**.
10. Select **Save this view** to save your changes.

Copy direction graphs to multiple floors

Select a campus or building and copy floor direction graphs from a floor to a single floor or multiple floors in a building.

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Before you begin

Note: If a building has similar floor layouts across floors, for example floor 1, 2, 3, etc, and if you want to replicate directions from one floor to another, copy directions from a single floor to multiple floors on a building. This will ensure that all connectors are linked between all floors.

The destination floors that you are copying from must belong to the same building. Copying direction graphs from one floor to multiple floors helps to copy the direction graphs that are manually created. Users don't have to draw the graph on every floor if the building architecture and structure is similar.

Role required: map editors, map admin, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus.
3. Select **Manage Workplace** > **Directions**.
4. Select a building on the Map Studio and click the More actions menu icon (⋮).
5. Select **Copy directions** from the list.

   a. In the Copy Directions dialog box, complete the following:

   - **From**: Select the floor from which you want to copy the directions from.
   - **To**: The floors to which you want to copy the directions to. Click **Select All** to select all or multiple floors at one go.

     Note: The floors must belong to the same building. For example, if you want to copy directions from Building A, then the floors that you select to copy must belong to Building A.

6. Select the floor in the **From** list and select a floor or click **Select all** to select multiple floors in a building.
7. Click **Copy directions**.
   The floor directions are copied to selected floor or floors.
8. Select **Clear floor directions** to clear existing directions for a selected building or floor.

Edit with view editor

Edit and customize indoor maps with the Map Studio view editor. Enabling the default view in Indoor Mapping is a mandatory step so that maps can render in Workplace Service Delivery.

Before you begin

For Indoor Mapping View editor, as a map administrator you cab decide which elements should be visible to map users. You can also define the style of different items such as layers and places. A default view type is available with Indoor Mapping but needs to be enabled. This is a mandatory step. If the default view is not enabled, Indoor Mapping maps are not rendered in Workplace Service Delivery.

You can create and customize additional view types as required. However, only the default view type is used in Workplace Service Delivery currently. View type and View editor are capabilities of Indoor Mapping.

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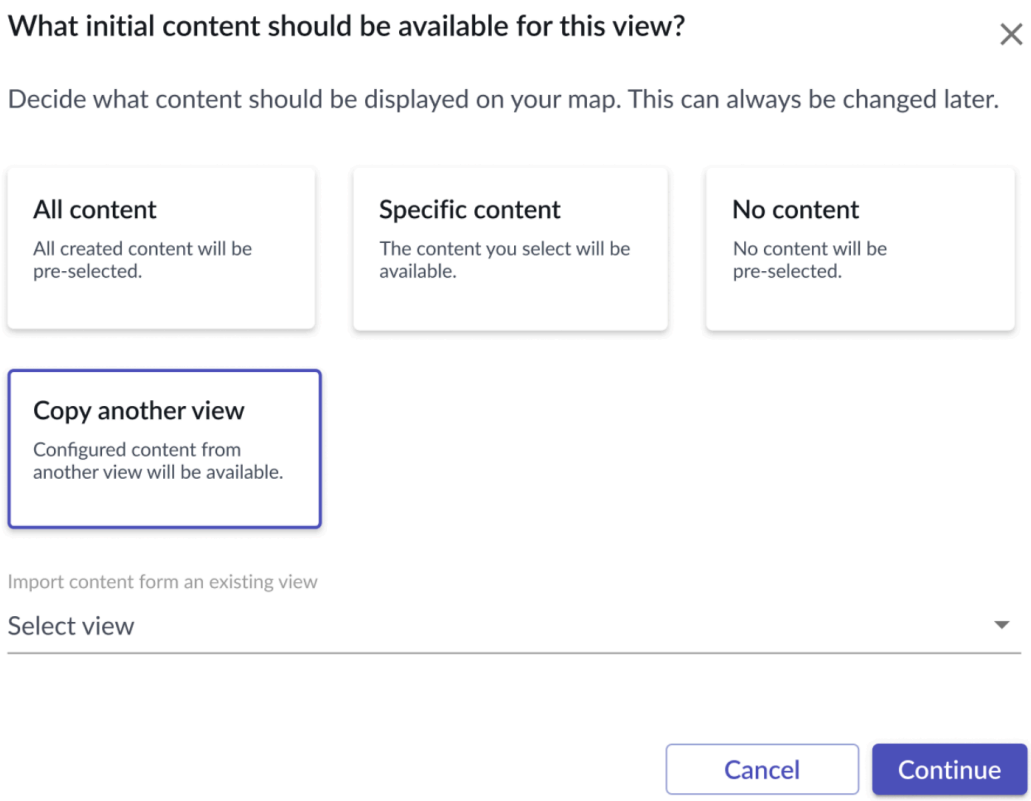
Note: Ensure that you have installed both Indoor Mapping and Workplace Indoor Mapping plugins.

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus or building from the home page and select **View editor**.
   The **Default** view and other view types that you have added to the View editor is displayed. For example, click **Default**. The **Edit** button is displayed when the view has already been configured and is not blank. If the view is never configured or is blank, it is replaced by a **Not enabled** warning. Click to edit and enable the view.



3. You are provided with the following four options.
   These options define the content that you want to display on you map. For example, adding multiple view types in your campus such as layers, places, place types, etc.
   - **All content**: In this option, the view is automatically generated. All buildings and floors are selected. All layer types, place types, connector types are also selected with the default style. All direction modes are selected.
   - **Copy from view**: Option to select a view. It can be other view types from the same campus or a view type from another campus. Only views that are configured appears. When selecting a view from the same campus, all view content is copied including buildings and floors. When selecting a view from a different campus, all buildings and floors are included with default options as they cannot be copied from the other campus.

     You can copy the selected content and style from another view. For example, if you want to change the display of place types in a view, you don't have to redo the whole process for each place type. You can just copy the configurations from another view and make the required adjustments to suit your needs.

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- **Specific content**: Pop-up dialog box option to select the buildings/floors, layer types, place types, connector types, and direction modes from the check list. The selected content is added to the view with its default style.
- **Start from a blank view**: In this option, you are not selecting any content. Nothing is displayed on the view and the map.

4. Select any of the four options from Step 3.
   For example, **Use the default configuration**.
5. Click **Continue**.
   The view content is loaded for the selected option and the map for selected campus along with view type is shown.
6. Click **Save this view** to save the changes.
7. When there is more than one View type, map creators can select **Copy another view** and then, **Import Styles from an existing**.
8. The **View Editor Content** displays content based on your selection.
   For more information, see View editor content.
9. Click **Apply** to apply the view changes.
10. Click **Save this view**.

    You also have the option to reset the view by clicking the More options menu icon ( ) available next to **Save this view option**.

View editor content

Work with the View Editor content and customize the campus, buildings, layers, places, connectors, and direction modes properties.

Before you begin

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus for which you want to customize the view editor content.
3. From Map Studio, select **Manage Workplace** > **View Editor**.
4. Select a view that you want to edit.
   For example: Default.

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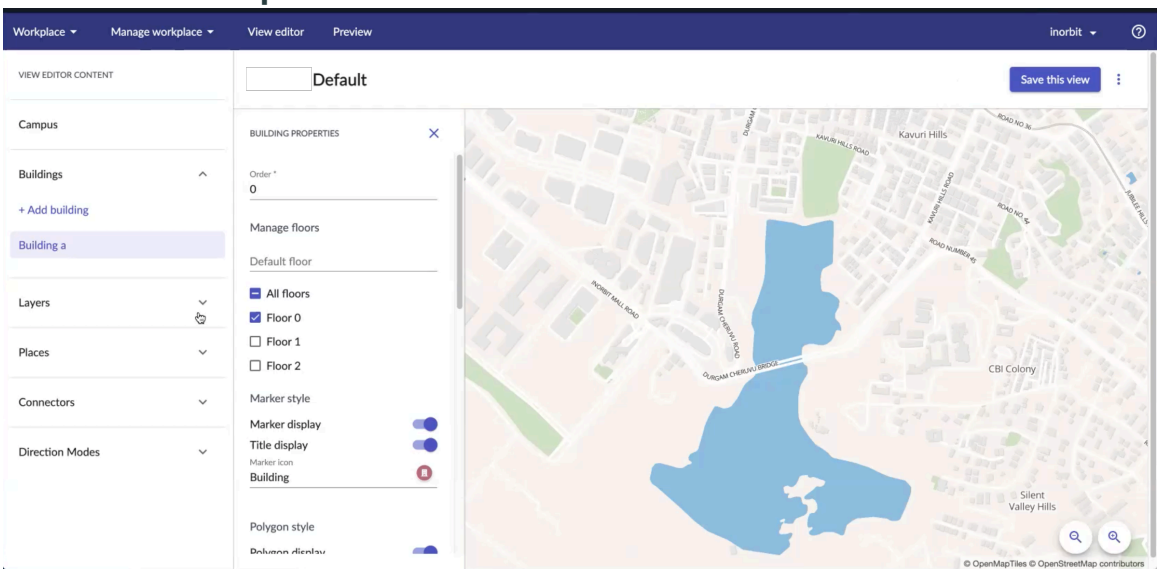
View editor content panel



5. To edit a campus view content, click the Campus drop-down list to display the campus properties.
6. Update the properties and decide how your campus will render on the map.
   Fill in form field

Campus properties

Field	Description
Marker style	Select the **Marker style** and **Title display** toggle key options.
Polygon style	Select the **Polygon style** option. Edit, if required, the stroke (line) color, width, opacity, fill color.
Default Camera	Click on the Default camera button to position it on the map. Set the default latitude and longitude, default bearing, and default pitch. A bearing is the direction you're facing, measured clockwise as an angle from true north on a compass.

7. Select **Buildings** and from the drop-down list, select the elements that you want display in your view.
8. Select **+Add building**.
9. From the Add or remove content page, select the required buildings and floors.
10. After making the changes, click **Apply**.
11. Select **Layers** and from the drop-down list, select **+Add layer**.
12. From the Add or remove content page, select the layers that you want to see in your view.
13. Select **Apply**.

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14. Select **Places** and from the drop-down list, select **+Add places**.
15. From the Add or remove content page, select the places you want to see in your view.
16. Click **Apply**.
17. Select **Connectors** and from the drop-down list, select **+Add connector**.
18. From the Add or remove content page, select the connectors you want to see in your view.
19. Click **Apply**.
20. Select **Direction Modes** and from the drop-down list, select **+Add direction modes**.
21. From the Add or remove content page, select the direction modes (Default or Accessible) that you want to see in your view.
22. Click **Apply**.

Map preview

Use theMap Preview to display maps and test directions that you have created in the Indoor Mapping Map Studio. Testing directions will ensure that directions graphs in wayfinding works as expected for employees and visitors.

Before you begin

Note: Step by step directions for wayfinding within workplaces are only available on the Now Mobile app.

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Select a campus.
   Create one if you do not have a campus in the map studio. For more information about how to create a campus, see Create a campus with buildings and floors
3. Click **Preview**.
   The map opens in the **Preview** mode. If the view is not enabled, nothing will appear in Preview. For more information, see Edit with view editor.
4. In the search field, search for places on the Campus, for example: Meeting room 101.
   When you start typing in the search field, application provides auto-suggestions for places that are available in the selected campus.
5. Select a place to highlight and display it on the map.

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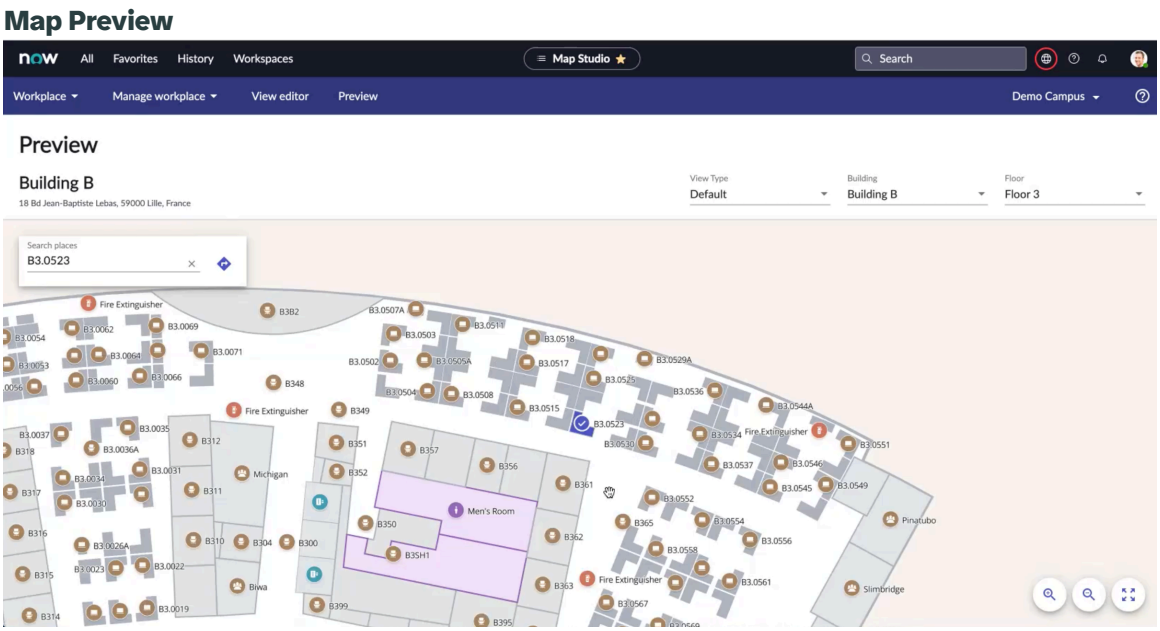
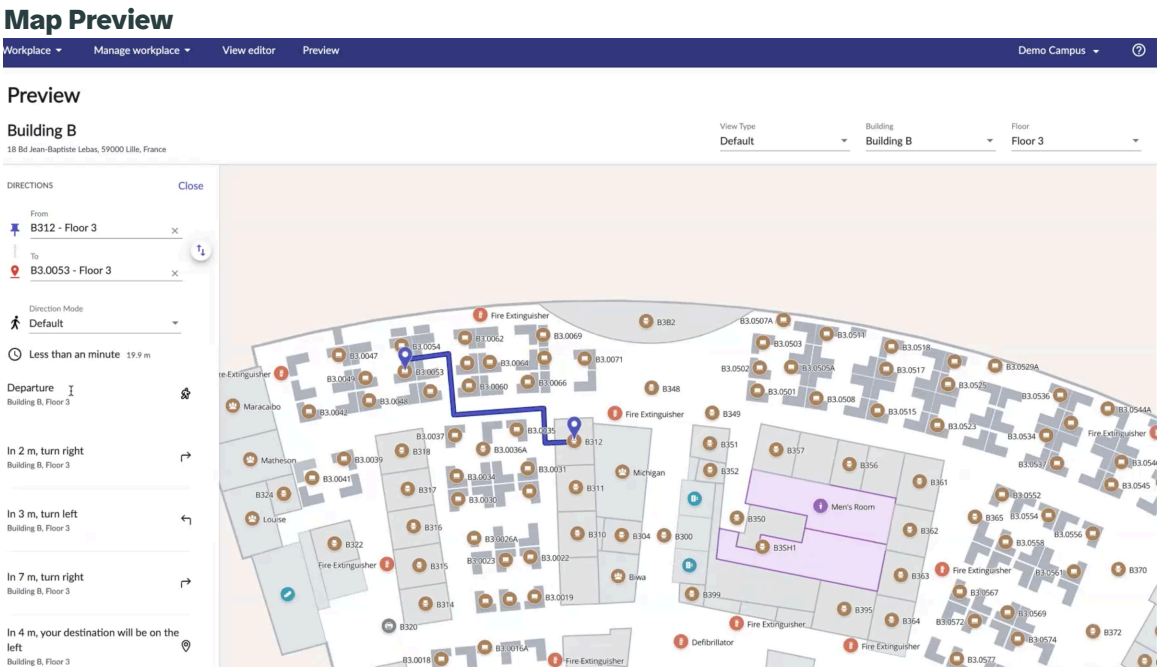


6. Select the **Get Directions** icon ( ) to open the change directions panel.
   Application provides alerts if you have not added direction modes for your View type in a selected campus. Adding direction mode helps to enable direction in a building for wayfinding and location directory.
7. Specify the **From** and **To** fields to specify the floors from where you want to have the wayfinding capabilities.
8. You can also add directions from one building to another.
9. Select the required buildings in the **From** and **To** fields to display the directions.

   For example: You can move from One building to another (Building A to B) on a campus. Within the same building (Building B), you can select a floor (Floor 3) and create directions for wayfinding from one space to another on Floor 3 (B312 to B3.0053).



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10. You can use the reverse direction icon available near the **From** and **To** fields to change the from and to options and reverse the directions.
11. Toggle between the **View Types** available on the top right menu (in case if you have multiple View types).

    Select the buildings and floors that you want to show on the map. Zoom in and zoom out as required.

    Change the Campus from the **Campus** drop-down list on the top right menu on the map studio.

Print a map

Print a map by configuring relevant options and applying filters.

About this task

You can print a map from one of the following applications.

- Location directory
- Workplace Central
  - Building overview

Before you begin

Note: Map printing is not supported on Mozilla Firefox.

Role required: sn_map_core.map_printer

Procedure

1. Navigate to the map view in your app, then select **Print map**.
2. On the Edit Map Content panel, configure the fields.

Edit Map Content panel

Field	Description
Show Pin on map	Option to display a pin on the map.
Pin label	Label text for the pin on the map. This field is available only if **Show Pin on map** is selected. This field appears only if **Show Pin on map** is selected and the pin position is saved. You can change the label by selecting **Edit Pin** from the Edit Map Content panel.
Remove Outdoor Background	Option to remove the map area outside the selected building.

3. **Optional:** Select a position on the map to place the pin, then select **Save Placement**.
   To place a pin on the map, the **Show Pin on map** field must be selected. You can change the position of the pin by selecting **Edit Pin** from the Edit Map Content panel.
4. **Optional:** On the Edit Map page, select a space to customize the space settings.

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Space Settings

Field	Description
Show Space Text	Option to display the space label on the map.
Show Space Marker	Option to display the space icon on the map.
Order on Map	Order of the space text and marker on the map. ○ Bring to Top: Space text and marker are moved to the top layer of the map. ○ Default: Space text and marker are on the default layer of the map. ○ Send to Back: Space text and marker are moved to the lowest layer of the map.
Space label text size	Size of the space label text on the map.

5. Select **Continue** to open the print layout page.
6. Select the paper size and orientation from the Print Layout panel.
   For more information about the options, see Map printing options.
7. In the preview area, zoom and drag the map based on your requirement.
   You can use right-click to rotate the map.
8. Configure the options in the Print Layout panel.
   For a description of the field values, see Map printing options.
9. Select **Print**.

Result
You can use your web browser to print the map or save it as a PDF.

Trouble?

- If the aspect ratio of the map is not the same as your instance, verify that the layout settings (like page size and orientation) of the print dialog of your browser are the same as the settings on your instance.
- If the map is shifted on the printed page, or the position of icons or the pin is not the same as your instance, set the margins in the print dialog of your browser to **None**.
- The license text is automatically added to the outdoor map and is included in the printed map. To remove the license text, you must remove the outdoor map by using the **Remove Outdoor Background** option.

Create Snapshots to migrate Indoor Mapping data

Create snapshots for taking point-in-time backups of your Indoor Mapping map data and objects and migrate the snapshots to Workplace Service Delivery instances.

Before you begin

Note: Users without map admin or map editor roles cannot create, read, download, or apply a snapshot. Users with wsd_core_admin roles can create or apply snapshots when the **Snapshot Workplace locations** option is enabled.

Snapshot capability in Indoor Mapping provides the following:

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- Ability to export Indoor mapping data and instance values
- Ability to import Indoor mapping data and instance values
- Ability to import and export Workplace Indoor Mapping related objects

Role required: map admin, map editor, wsd_core_admin

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Snapshots**.
   The Snapshots page appears and list of existing snapshots, if any, are displayed.
2. Select **New** to create a new snapshot record.
   Ensure to export/import the update set for Indoor Mapping and other configured applications as well.
3. Complete the following information:
   - **Name**: Provide a name for the snapshot.
   - **Campuses**: Select single or multiple campuses as required. By default all campuses are selected.
   - **Include workplace locations**: Select it to capture all workplace elements linked to Indoor Mapping.
4. Click **Submit**.

   The snapshot is created. The status is shown as **In Progress** in the Snapshot page. This process may take some time to complete. Once completed, the state moves to **Created**.
5. From the Snapshot page, click open the newly created snapshot data.
6. Select **Download Snapshot** to download or export the snapshot locally.
   Files will be downloaded as XML.
7. Import the snapshot using update sets on a different instance where you want to apply the snapshot.
8. Navigate to **All** > **System Update Sets** > **Retrieve update sets** to import the XML file.
9. From the Related Links, select **Import Update Set from XML**.
10. On the Import XML page, click **Choose file** and select the downloaded XML from where you have downloaded the XML file.
11. Select **Upload**.
12. After importing, go to **Indoor Mapping** > **Snapshots** and select the imported snapshot.
13. Click **Apply snapshot** to apply it to an instance where you want to have the snapshot data applied.

    Applying a snapshot overwrites all the records for a selected map object for example, campus,building, floor, or spaces. So having a snapshot in place helps in case a backup data is required.
14. Select **Yes** to apply the snapshot to a selected map object.
15. To delete a snapshot, select the campus from the Campus page and click **Actions** on Selected items drop-down box and select **Delete**.
16. Few tables are impacted during the snapshot process.
    For more information about impacted tables, see Snapshot Impacted tables.

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Keyboard shortcuts

The keyboard shortcuts provided with Indoor Mapping allow Map Studio administrators to quickly perform common administrative tasks by using keys in the **Map Studio**.

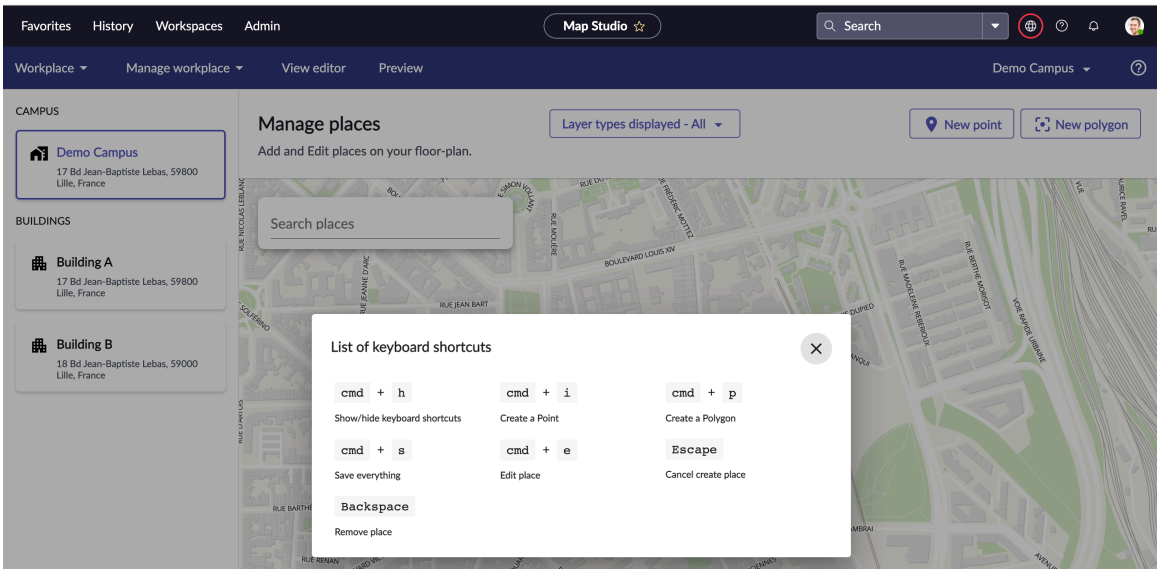
Before you begin

Role required: map admin, map editor, map editor limited

Procedure

1. Navigate to **All** > **Map Studio**.
2. Select a campus.
3. Click the help icon ( ) to display the list of keyboard shortcuts available.
   You can also use **cmd + :** (Mac) or **ctrl+:** (Windows) to display the keyboards shortcut list. Press **esc** to close the dialog box.

List of keyboard shortcuts



4. To display the keyboard shortcuts for **Directions** click the help icon ( ) available on the top right pane of the Map Studio.
   - Toggle draw mode; **cmd + m** (Mac) or **ctrl+m** (Windows).
   - Save all updated graphs: **cmd +s** (Mac) or **ctrl+m** (Windows).
   - Stop drawing: Press **esc** (Mac) or **Esc** (Windows).
   - Delete selected items: When a node or route is selected, press **fn + delete** (Mac) or **Backspace** (Windows).
5. To display list of shortcuts for Places:
   - Create a new place with a point: **cmd + i** (Mac) or **ctrl + i**.
   - Create a new polygon: **cmd +p** (Mac) or **ctrl +p**
   - Edit a selected place: **cmd +e** (Mac) or **ctrl +e** (Windows)
   - Save the selected place: **cmd +s** (Mac) or **ctrl +s** (Windows)
   - Cancel the create a place process: **esc** (Mac) or **Esc** (Windows)
   - Delete a selected place: **fn + delete** (Mac) or **Backspace** (Windows).

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Synchronize Indoor Mapping with Workplace Service Delivery

Synchronize Indoor Mapping locations and map data objects with Workplace Service Delivery campus, buildings, floors, and spaces.

Before you begin

The changes that you make to Workplace Service Delivery building, floor, and space records are not updated automatically with the Indoor Mapping map data and objects. To update the changes, synchronize Indoor Mapping campus, buildings, floors, and place types with Workplace Service Delivery (WSD) location records.

Note: After installing the Indoor Mapping application and updating locations on your map, run the synchronization utility to synchronize Indoor Mapping location records with Workplace Service Delivery locations. Run the synchronization utility when you add, update, or remove locations from Workplace Service Delivery or update locations or map objects in Indoor Mapping Map Studio.

The synchronization process is a five-step process. Take appropriate actions as required during the synchronization process:

- Cleaning: The Cleaning step in the synchronization utility isn't available initially when you run the synchronization wizard for the first time. It is available only for spaces that are deleted while making updates to the Indoor Mapping Map studio.

  Note: A **Cleaning** step can also appear as your first step in the synchronization utility if a location record is changed or updated in the Indoor Mapping Map studio. This step is shown for location records that are synchronized but are updated or modified later on after the synchronization process.

- Building Sync: Option to synchronize a building in a campus in Indoor Mapping and Workplace Service Delivery.
- Floors Sync: Option to synchronize the floors in a building in Indoor Mapping and Workplace Service Delivery floor record.
- Types Sync: Option to link and map Indoor Mapping place types to corresponding spaces in Workplace Service Delivery.This option shows the Indoor Mapping place types that are not linked to a Workplace Service Delivery spaces. You can select the **Link** operation in the synchronization utility to link the location records.
- Spaces Sync: Option to synchronize the spaces available on a floor.

Role required: admin

Procedure

1. Navigate to **All** > **Space Mapping** > **Indoor Mapping Administration** > **Indoor Map / WSD Synchronizations**.

   The Indoor Map / WSD Synchronizations page displays existing synchronization records for Indoor Mapping and Workplace Service Delivery.

2. Select **New**.

   Note: You must create or have an existing Campus, Region, and Site in Workplace Service Delivery (WSD).

   On the form, fill in the fields.

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Indoor map / WSD Synchronization form

Field	Description
WSD Campus	Option to select a Workplace Service Delivery campus. Select the lookup list icon () to search and select a Workplace Service Delivery campus. Make sure that the time zone of the campus matches with the Region of your Indoor Mapping campus.

3. Select **Submit**.

   A new synchronization record is created.

4. From the synchronization record page, select the Indoor Mapping Campus that you want to synchronize with the Workplace Service Delivery Campus, if they aren't already synchronized. The new synchronize script record opens (for Example: IMWS0005278).

   On the form, fill in the form fields.

Indoor Map/WSD synchronizations form

Field	Description
WSD Campus	Campus created in Step 3.
Indoor Map Campus	Indoor Map campus. Search using the lookup list icon () to select the Indoor Mapping campus information or search for an Indoor Map campus.

   The campuses are synchronized.

5. The synchronization utility proceeds to synchronize a building in a campus.

   This is the first step in the synchronization process if you are running the synchronization utility for the first time.

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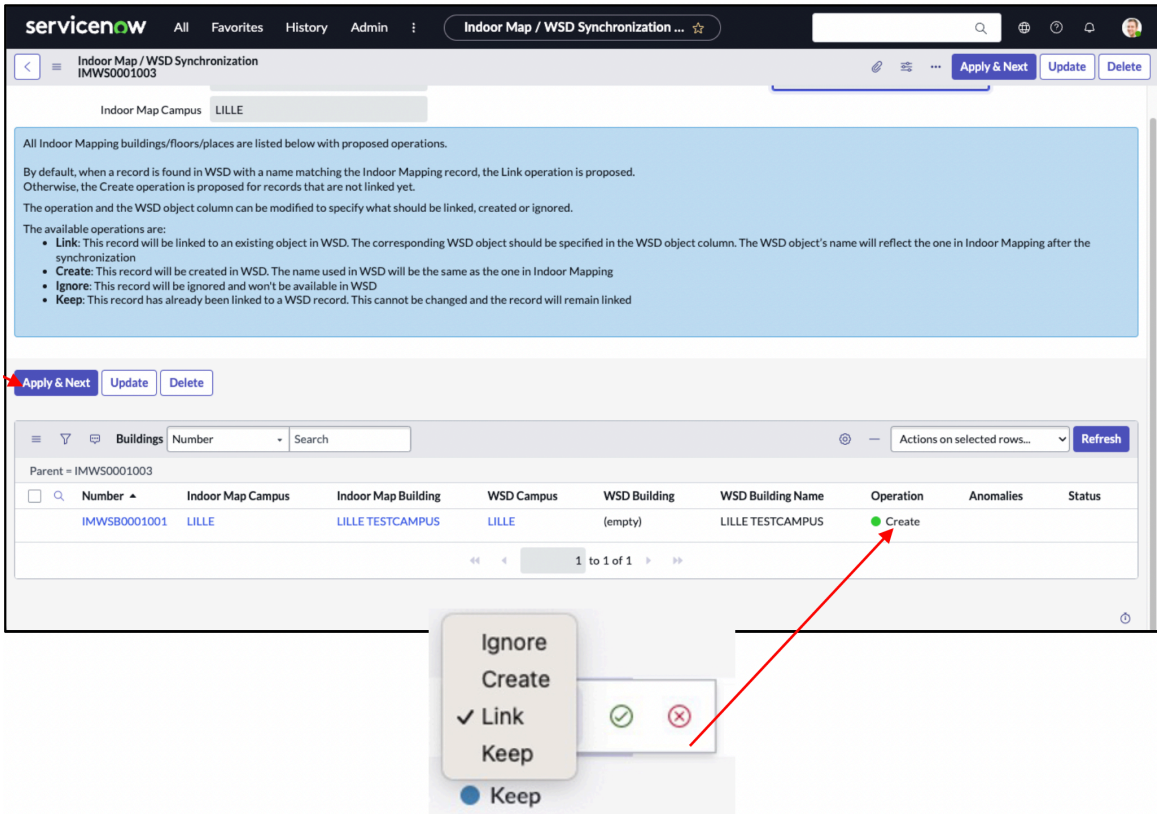

Indoor Map / CMN Location Synchronization

WSD Campus	Name of the Workplace Service Delivery campus.
Indoor Map Campus	Name of the Indoor Mapping campus.
State	Building

Note: A **Cleaning** step can also appear as your first step in the synchronization utility if changes or additions are made to Indoor Mapping locations records or map objects after they are synchronized.

You can change the proposed operation in the synchronization utility. Select an operation from the Operation column and right-click to change it.

- If a new building is detected, **Create** operation is proposed in the Building related list Operation column. Indicates that a corresponding Indoor Mapping map record doesn't exist in Workplace Service Delivery, and a new record should be created. The location name used in Workplace Service Delivery should be similar to the location name in Indoor Mapping
- **Link**: Indicates that a matching record from Indoor Mapping is found in Workplace Service Delivery based on the location name. The Indoor Mapping record is linked to an existing object in Workplace Service Delivery (WSD). After linking, the Workplace Service Delivery location name is shown in Indoor Mapping.
- **Ignore**: Indicates that the Indoor Mapping record is ignored and won't be available in Workplace Service Delivery.
- **Keep**: Indicates that the Indoor Mapping record is already linked to a Workplace Service Delivery record. This record can't be changed in the synchronization process. If you want to unlink a record, select a location record in Workplace Core and select **Unlink**. After unlinking, the location record doesn't show the **Keep** operation.

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- **Cleaning**: Two synchronization operations are available when performing the cleaning activity on a location record:
  - **Retire**: Option to set the status of Workplace Service Delivery location to **Retire**.

    Note: This action removes all references to Indoor Mapping and is deactivated in the Workplace Core location table. The object is not available for subsequent synchronizations.

  - **Unlink**: Option to unlink or remove references to Indoor Mapping. The location remains active in Workplace Core and can be reused in subsequent synchronizations.

6. Select **Apply & Next**.

   The synchronization process shows anomalies if a record is invalid. Go to the instance log page to verify the reason for anomaly.

   The building records are synchronized and the status is shown as **Queued**.

   Note: The synchronization utility takes sometime to synchronize a location record. Wait till the operation completes and the page is refreshed with updated status. Don't select **Update** as synchronization at this stage is incomplete.

7. After building records are synchronized, the synchronization utility **State** moves to **Floor**.

   Indoor Map / CMN Location Synchronization

WSD Campus	Name of the Workplace Service Delivery campus.
Indoor Map Campus	Name of the Indoor Mapping campus is selected by default.
State	Building

   The floor records are ready to be synchronized and the status is shown as **Queued**.

   Note: The synchronization utility takes sometime to synchronize a location record. Please wait till a synchronization operation completes before you proceed to the next step in the synchronization utility. Don't select **Update** as synchronization at this stage is incomplete. The synchronization process shows anomalies if a record is invalid in the Anomaly column of the Related list.

8. Select **Apply & Next**.

   Note: The synchronization process is executed as per the proposed operation. Wait till a synchronization operation completes before you proceed to the next step in the synchronization utility. Don't select **Update** as synchronization at this stage is incomplete. A synchronization operation must be complete before starting a new one.

9. **Optional:** Proceed with **Type** synchronization.

   Indoor Mapping places that aren't linked to Workplace Service Delivery spaces are ignored from the synchronization process. This step ensures that all Indoor Mapping place types are linked to appropriate Workplace Service Delivery spaces.

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- By default, new location **Types** are linked to **Miscellaneous**.
- In the Related List, select the Operation column, and make inline edits.
- Right-click and selecting **Link**, **Ignore**, or **Keep** to change the proposed operation.

10. Select **Apply & Next**.

> **Note:** The synchronization process is executed as per the proposed operation. Wait till a synchronization operation completes before you proceed to the next step in the synchronization utility. Don't select **Update** as synchronization at this stage is incomplete. A synchronization operation must be complete before starting a new one.

11. **Optional:** The synchronization utility shows the **Updated Space Type on Link or Keep?** option.

    (Optional) This option prevents overwriting location records that are already synchronized.

    For example, a place type (Auditorium) in Indoor Mapping is linked to a **Miscellaneous** Workplace Service Delivery Space Type. If this space type is later changed to a Meeting room in Workplace Service Delivery, update this location record by selecting **Updated Space Type on Link or Keep?**. This prevents overwriting the location records later on in the synchronization process when **Link** and **Keep** operations are selected. A corresponding Workplace Service Delivery location is only added in Indoor Mapping when **Create** option is selected.

12. The synchronization utility state moves to **Space** synchronization.

Indoor Map / CMN Location Synchronization

WSD Campus	Name of the Workplace Service Delivery campus.
Indoor Map Campus	Name of the Indoor Mapping campus is selected by default.
State	Spaces

13. Proceed with the suggested operations **Link**, **Create**, **Ignore**, or **Keep**.
14. Select **Apply & Next**.

> **Note:** The synchronization process is executed as per the proposed operation. The **Remaining operations** field shows the progress of synchronization. Wait till an operation completes. Select **Refresh** on the Related lists to get the synchronized status of a record.
>
> A synchronization operation must be complete before starting a new one. Don't select **Update** as synchronization at this stage is incomplete.

15. **Optional:** If any updates or changes are made to Indoor Mapping location or map data objects in the Map studio after a location record is already synchronized, a **Cleaning** step appears in the Synchronization utility wizard as your first step.
    Location record that is deleted or updated in Indoor Mapping Map studio after a locations is synchronized are shown for you to take appropriate action. By default, the **Retire** operation is proposed. It can be changed an **Unlink** operation.

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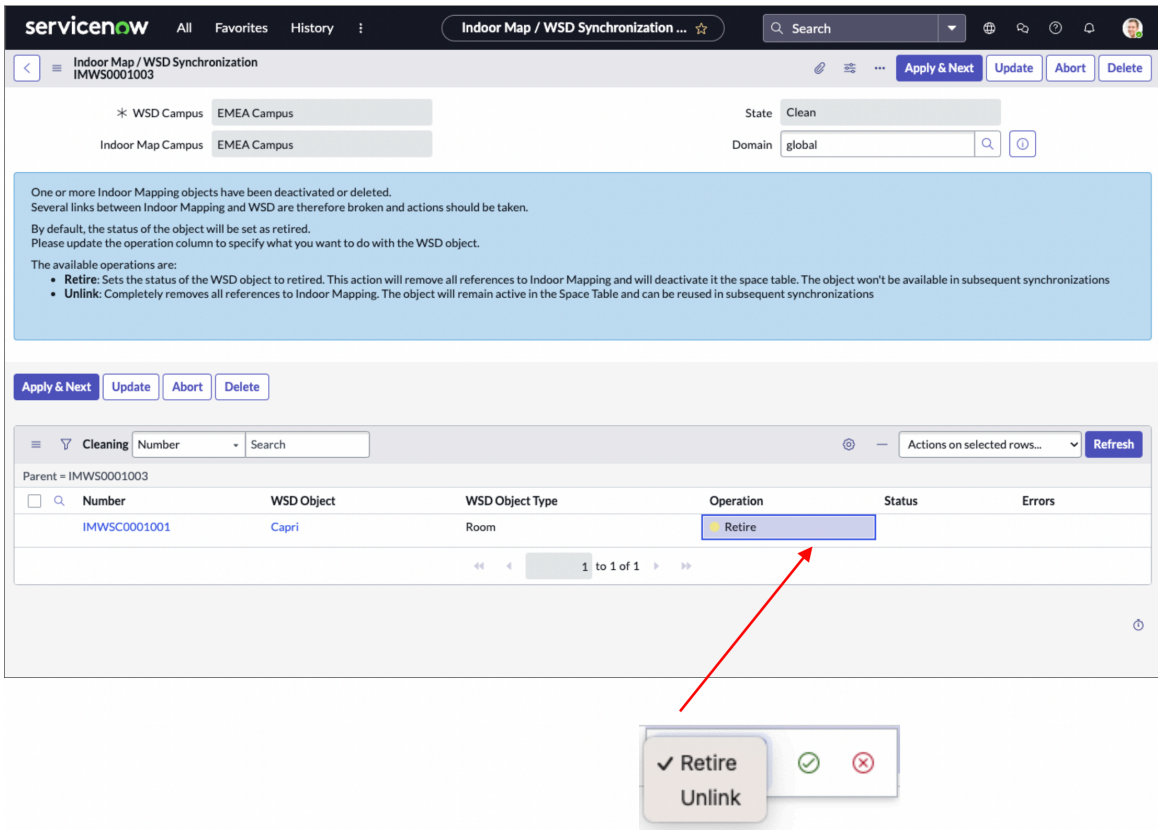

16. When all location records are synchronized in a campus, the synchronization **State** moves to **Complete**.
17. Enable the Default view in the Indoor Mapping Map studio.

    Note: Enabling the default view in Indoor Mapping is a mandatory step. The Default view is required to render the map in Workplace Service Delivery. For more information about Default view, see Edit with view editor.

18. **Optional:** Configure notifications to be sent to workplace users every time a change or update is made to synchronized location records.

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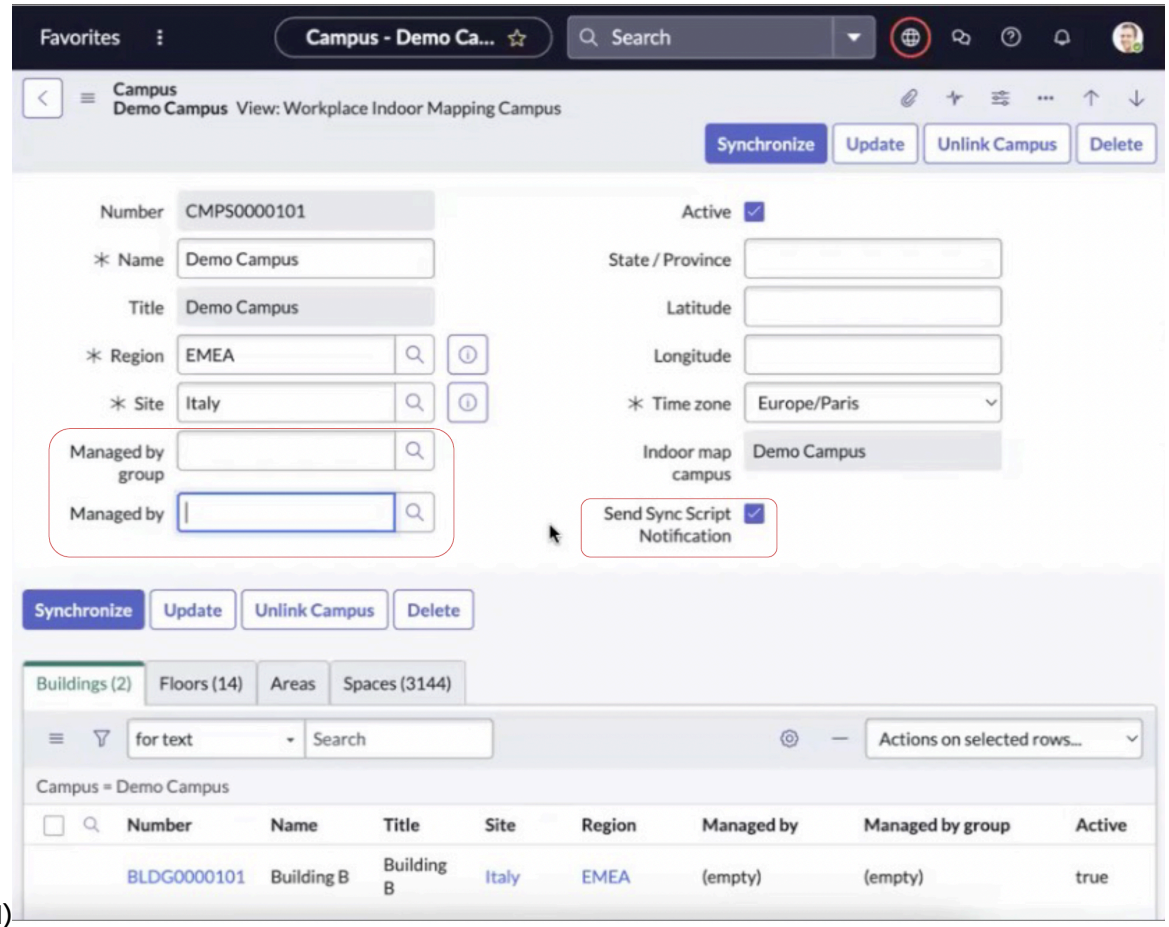
(Optional)



a. Enable notifications on the Workplace Core Campus Table.

b. Navigate to **All** > **Workplace Core** > **Administration** > **Campuses**.

c. On the campus page, select the gear settings icon ( ).

d. In the Personalized list columns, select **Send Sync Script Notification** and add it to the Selected column.

e. Select **Ok**.

f. On the campus page, from the list of campuses, select a campus.

g. In the **Managed by group** field, select the lookup list icon ( ) to search for a workplace group and add the group.

h. In **Managed by** field, select the lookup list icon ( ) to search for a workplace user and add the workplace user.

i. Select the **Send sync script notification** checkbox.
Workplace users are notified daily whenever a location record is updated and when unsynchronized data is detected.

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19. Launch the synchronize utility to update location records with the latest changes.

    When changes are done in Indoor Mapping Map Studio, updated locations and map objects are not automatically synchronized with Workplace Service Delivery Spaces. It is necessary to manually run the Synchronization utility.

    Enable the **Synchronize** and **Unlink campus** on a Workplace Service Delivery campus.

    a. Navigate to **All** > **Workplace Core** > **Space Administration** > **Campuses**.

    b. Select a campus from the list of campuses.
    For example, campus 501.

    c. On the Campus form details page, select the additional actions menu icon ( ).

    d. Select **View** > **Workplace Indoor Mapping** campus.

    e. Select the time zone of your campus.

    f. Add the Indoor Mapping campus name to the Indoor Mapping campus field.

    g. Select **Save** to link the WSD Campus and Indoor Mapping Campus.

    h. After saving, the following buttons are available:

    - **Synchronize**: Option to navigate to the Indoor Map/WSD synchronizations page.
    - **Unlink Campus**: Option to remove the link or mapping between Workplace Service Delivery campus and Indoor Mapping campus. The location remains active in Workplace Core and can be reused in subsequent synchronizations.

      The **Unlink Campus** tab is available after the synchronization is complete and the Indoor Mapping map object is linked to WSD locations indicating that the linking is complete. Unlinking a campus unlinks all the buildings associated with a campus. Unlinking a building unlinks all the floors and spaces associated with a building. Unlinking a floor unlinks the spaces associated with a floor.

Synchronize Indoor Mapping with CMN Locations

Create a new CMN Location or synchronize an existing CMN Location with a corresponding Indoor Mapping Place type.

Note:

Synchronize CMN Locations with Indoor Mapping map data objects. Workplace Service Delivery is not installed in your instance in this case and you have CMN location types that you want to synchronize with Indoor Mapping.

Note: After installing Indoor Mapping and updating locations in the Map Studio, run the sync script to synchronize it with CMN locations and keep it up-to-date. The synchronization process must be performed every time a new place or location is updated in the Indoor Mapping Map Studio. For more information, see Synchronize Indoor Mapping map data with CMN location.

Ensure that your CMN Locations (cmn_location) have the correct CMN Location types mapping to synchronize with Indoor Mapping campuses, buildings, floors, and places. For example, when

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you are synchronizing Indoor Mapping buildings, the sync script checks and ensures that the corresponding CMN location has the location type as Building/Structure. If the sync script is unable to find the appropriate CMN location type, then, it gives a suggestion for you to create a new building. Hence, mapping the CMN Locations with appropriate CMN Location types is required.

During the synchronization process all CMN Locations are renamed to match with location names in Indoor Mapping. For example, if your campus name in Indoor Mapping is Demo Campus. Then, the corresponding CMN Campus too will be renamed to Demo Campus in the CMN Location Table.

Consider the following to synchronize CMN locations with Indoor Mapping locations and map data:

Enable the CMN location property

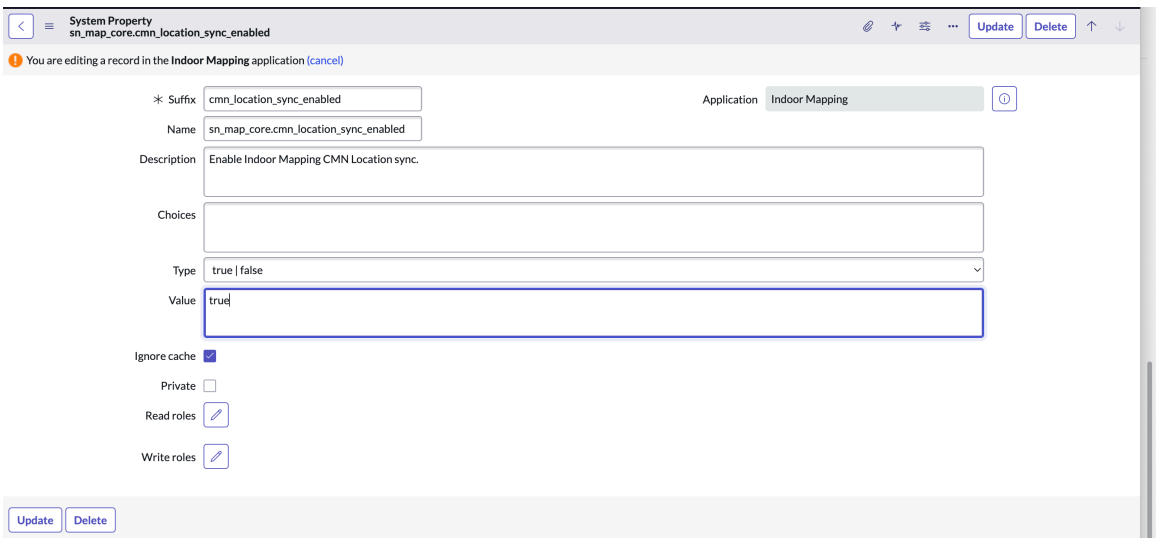
To synchronize CMN Location types with Indoor Mapping, enable the system property **sn_map_core.cmn_location_sync_enabled**.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **sys_properties.list**.
2. In the System Properties page, search for **cmn** in the **Name** column.
3. Select to open the **sn_map_core.cmn_location_sync_enabled** property.



Default value of this property is **true**.

Note: If Workplace Service Delivery is installed in your system, this property should be set to **false**. You can enable this property (if it is set to false and if Workplace Service Delivery is not installed) to synchronize CMN locations and location types with Indoor Mapping map data.

Add CMN locations and map it to Indoor Mapping Place types

CMN Locations types are not available by default in the Indoor Mapping Place types table. Associate or map an existing CMN Location type in your instance with a corresponding CMN Location Type column in the Indoor Mapping Place Types table. When CMN Location types are not available, create a CMN location type to associate it with a Indoor Mapping Place type.

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Before you begin

Synchronization utility looks for a corresponding CMN location type and synchronizes it with a Indoor Mapping place type. For example: Indoor Mapping Place type **Desks** is mapped with CMN Location type **Desks**.

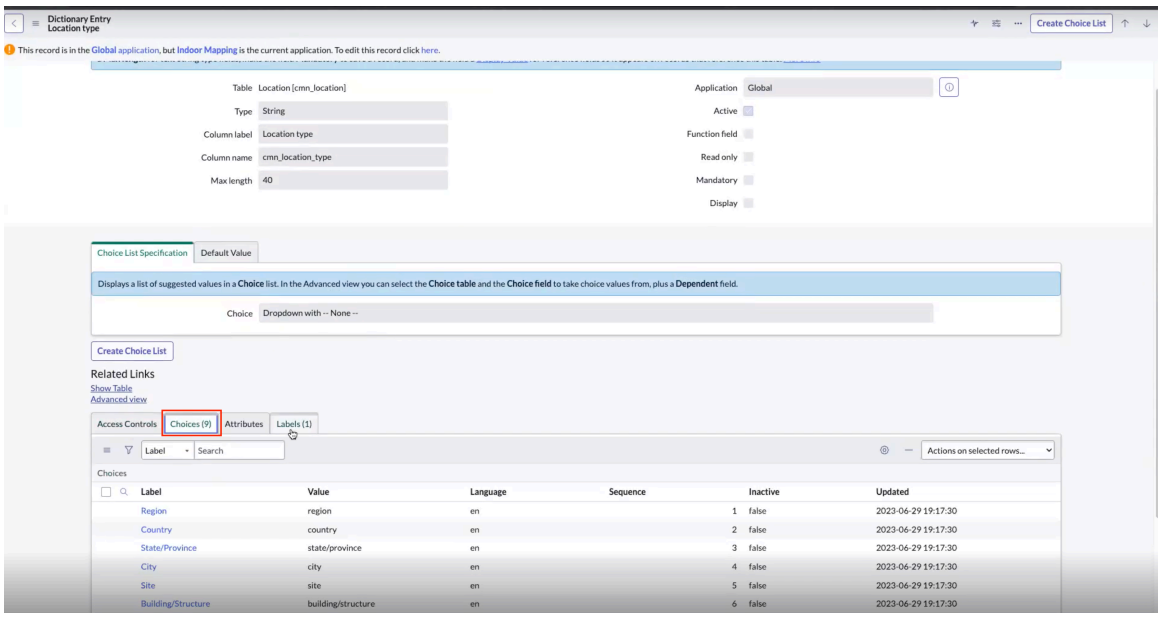
Note: In case of Indoor Mapping, all map objects like campus, building, floor, and Places have separate tables. But in case of CMN location, there's only one table for Campus, buildings, floors and Location place types. The Parent column in CMN location table contains the hierarchy of campus, buildings, floors and so on. All map objects in the CMN location table have a parent location column and a child location according to which the locations are created in the Locations table [cmn_location].

Role required: admin

Procedure

1. Navigate to **All** > **System Definitions** > **Tables**.
2. Select or search for the **Locations** (cmn_location) table.
3. In the Columns related list, select **Location type**.

   The Location type table is displayed.
4. Add a location in the Location type table for a CMN location.
   The locations types are used in the CMN Location type column of Indoor Mapping Place types table. This is a mandatory step as CMN location types are not available by default in the Indoor Mapping Place types table.
5. Click the **Choices** column to create corresponding Indoor Mapping Place types in the CMN location table.
   For example, Place types of Desks, Meeting rooms and so on.



6. Select the **Inset a row option** in the **Label** column and add a CMN location place type (for example, Desks).
7. Make inline edits and save the record.
8. To map the CMN location types (places, see step 6) with Indoor Mapping Place Types, change the Application scope to Global.

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9. Select **Indoor Mapping**.

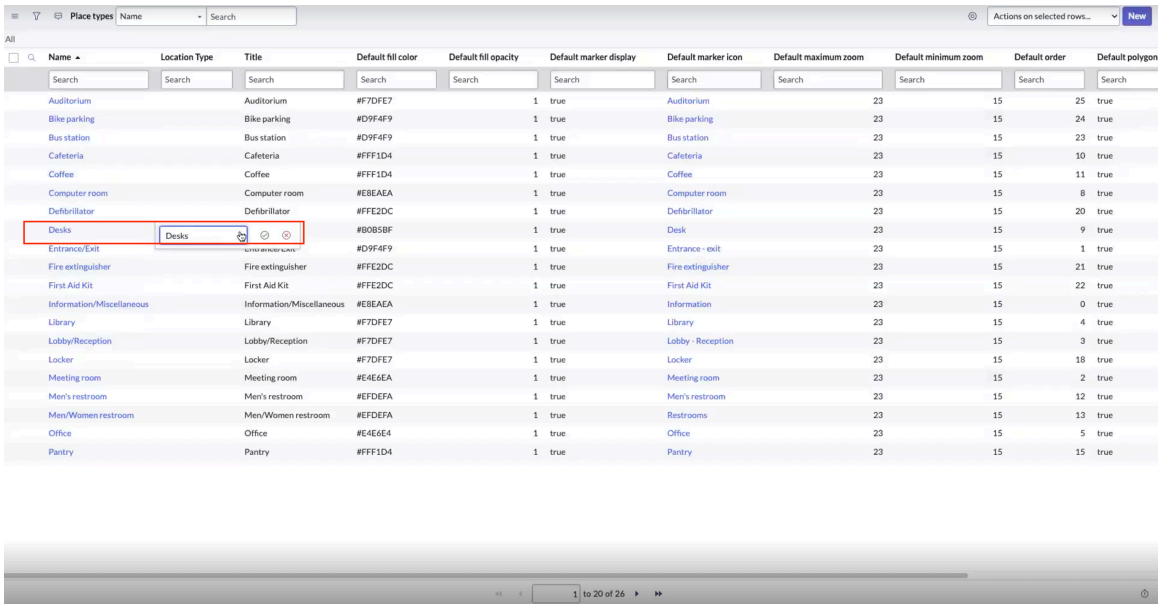
10. Navigate to the **All** > **Indoor Mapping** > **Place types** table.

11. Select the personalize list icon ( ) and move **Location type** to the Selected list column.

12. Double click any row to make inline edits in the Location Type (cmn_location_type) column and add a CMN location to match corresponding Indoor Mapping place types.

    For example, add place types of **Desks**.

    Note: The place type (Desks) was added in the CMN locations table (cmn_locations) Choices column in step 6.



13. Save the record after making inline edits.

    This step should be done manually every time you want to add a corresponding Indoor Mapping place types and map it with a CMN location place types. The synchronization script maps the CMN locations with relevant Indoor Mapping places. If the CMN location types are not added, the synchronization script shows the **CMN Location Type** column as empty as it is unable to find a corresponding CMN location place type for Indoor Mapping places.

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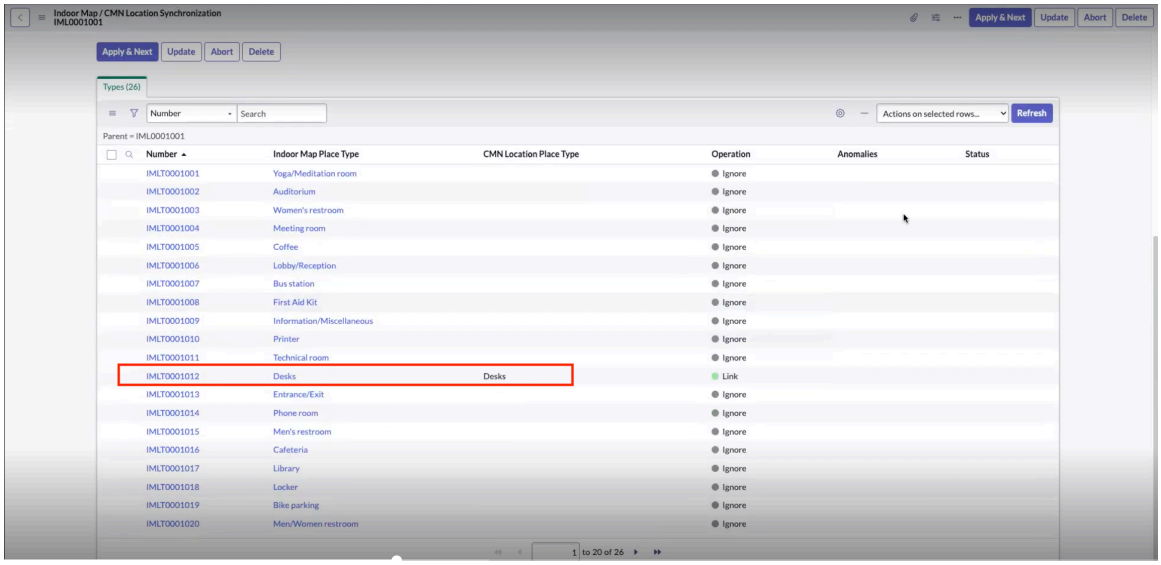

Note: Indoor Mapping Outdoor places (for example, cafeteria, park, and so on) are linked directly to a campus and not to a floor. While synchronizing the CMN locations, the outdoor places are also synchronized.

Result

The CMN location types are added and ready to be mapped with corresponding Indoor Mapping places.

Synchronize Indoor Mapping map data with CMN location

Synchronize the CMN Locations and Location place types with Indoor Mapping map data, places, and place types.

Before you begin

Role required: admin

Procedure

1. Make sure that you have configured Indoor Mapping locations, floor plan, and map object:
   - Add campus, building, and floors in Map studio. For more information, see Create a campus with buildings and floors.
   - Add floor plan to a floor. For more information, see and Manage CAD source files.
   - Add places in Map studio. For more information, see Manage places
   - Enable the Default view in the Indoor Mapping Map studio. In the Indoor Mapping select **View editor** > **Default**. Select **All content**.

     Note: Enabling the default view in Indoor Mapping is a mandatory step. The Default view is required to render the floor maps in Workplace Service Delivery. For more information, see Edit with view editor.

2. Navigate to **Indoor Mapping** > **Campuses**.
3. From the Campus page, select a campus.
   For example: Demo campus
4. To create a CMN campus, navigate to **All** > **CMN Location** and open the open the Location table (cmn_location) and select **New**.

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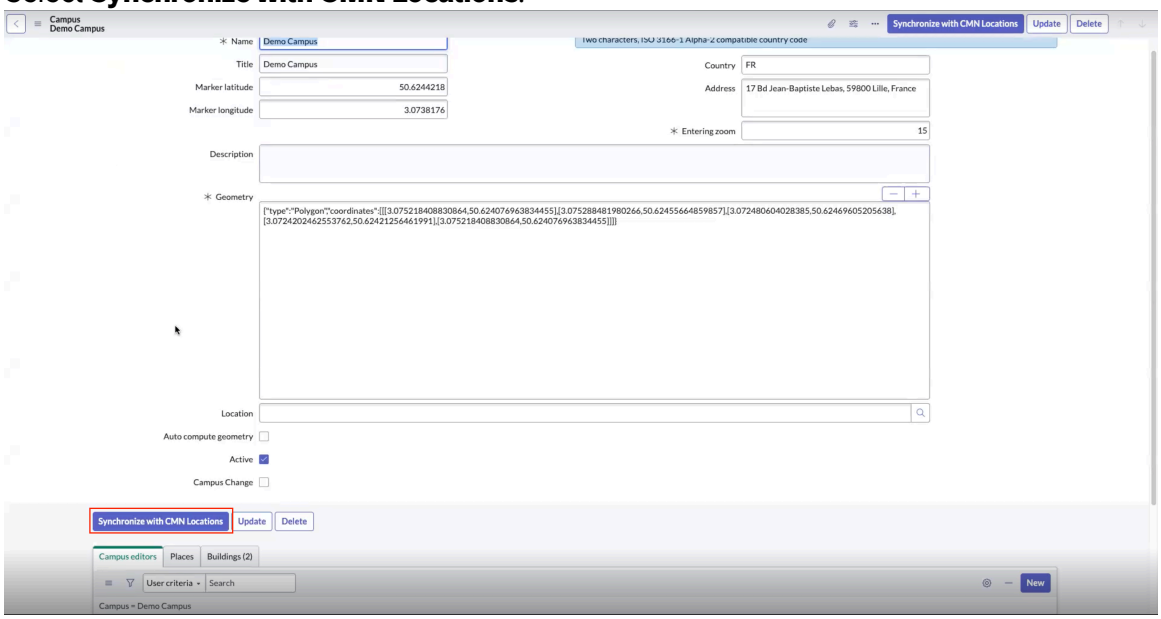
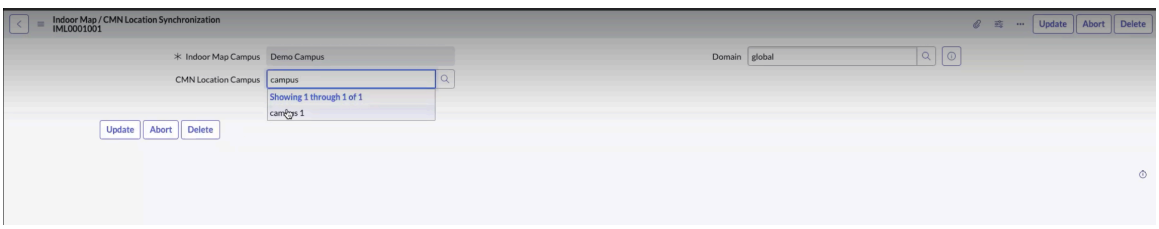
5. On the Location form, fill in the form fields:
   - Name: Name of the campus.
   - Street: Street where the campus is located.
   - City: Address of the campus.
   - State/Province: Stat where the campus resides.
   - Country: Country where the campus is located.
   - Parent: Parent-child hierarchy. For example, Campus is the Parent and Buildings belonging to a Campus will be the child. For more information, see Configure location migration hierarchy.
   - Latitude: Latitude coordinates of a campus location.
   - Longitude: Longitude coordinates of a campus location.
6. Select **Submit**.
7. Select and open the **Demo Campus** that you created in step 3.
8. Select **Synchronize with CMN Locations**.



9. On the synchronization record form, search and select the CMN campus that you created in step 5.



10. Select **Update** to map the Indoor Mapping campus with the CMN campus.
    The location record is updated in the CMN Locations table.
11. **Optional:** Navigate to **All** > **Tables** and search for the synchronization record.

    (Optional) Make sure that the Indoor Mapping campus name matches with the CMN Location Campus.

12. Navigate to **Indoor Mapping** > **Campuses**.

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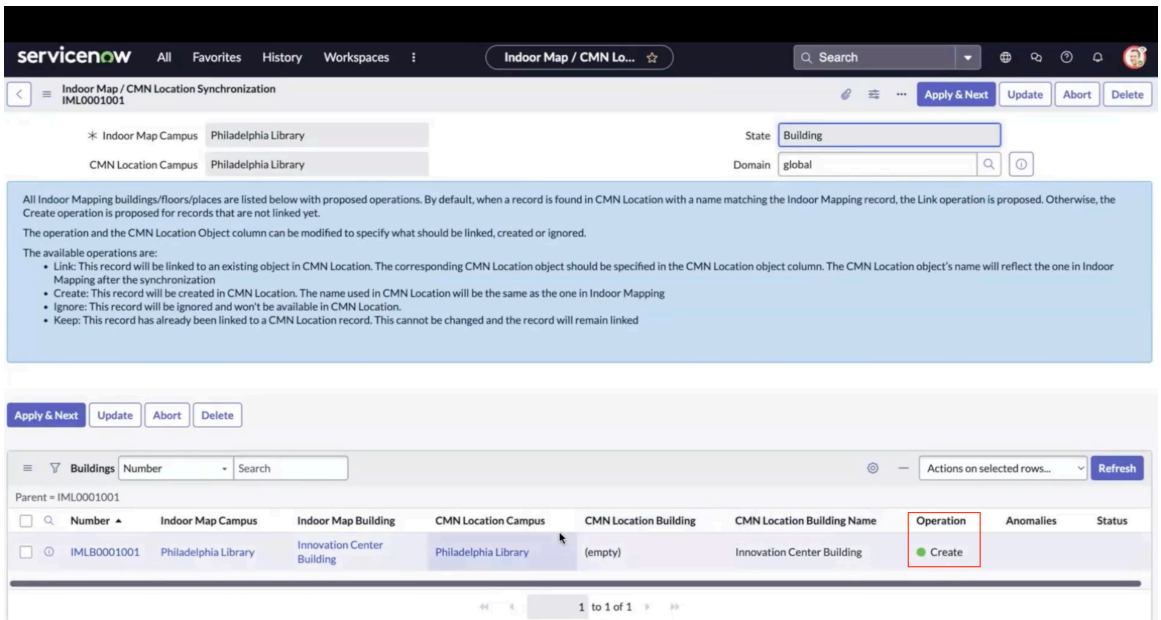
13. Select the Indoor Mapping campus that you want to synchronize.
14. Select Indoor Map / CMN Location Synchronization to run the sync script.
15. The synchronization record form synchronizes the campus and moves to synchronize the buildings in a campus and shows the following prefilled data.

Indoor Map / CMN Location Synchronization

Indoor Map Campus	Name of the Indoor Mapping campus is selected by default.
CMN Location Campus	Name of the CMN Location campus is selected by default.
State	Building
Domain	Global

16. From the Building related list, select an operation from the Operation column and right-click to change the suggested operation.



Following options are available:

- **Create**: Indicates that a corresponding CMN building doesn't exist in Indoor Mapping, and a new record should be created. The location name used in CMN location should match with the the location name in Indoor Mapping.
- **Link**: Indicates that a matching record from CMN location is found in Indoor Mapping. Select this option to link the CMN building with Indoor Mapping.
- **Ignore**: Indicates that the CMN location can be ignored and won't be available in Indoor Mapping.
- **Keep**: Indicates that the CMN location is already linked to a corresponding record in Indoor Mapping. This record can't be changed in the synchronization process.

17. Select **Apply & Next**.
18. If you selected **Create** operation in Step 16, a building is created in the CMN location and the status is shown as **Queued**.

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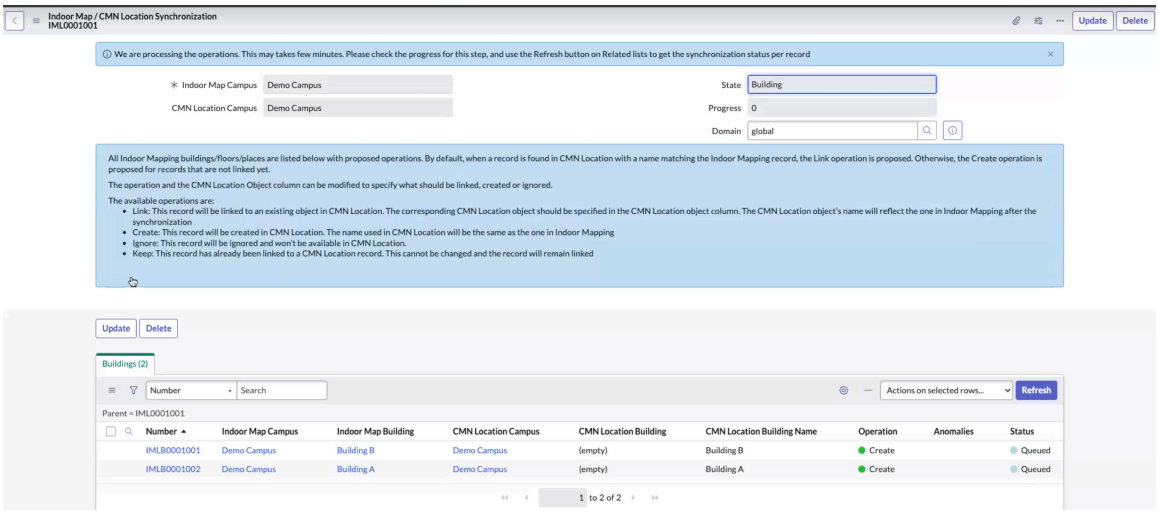
The synchronization is executed according to the selection operation (Create, Link, Keep, or Ignore).

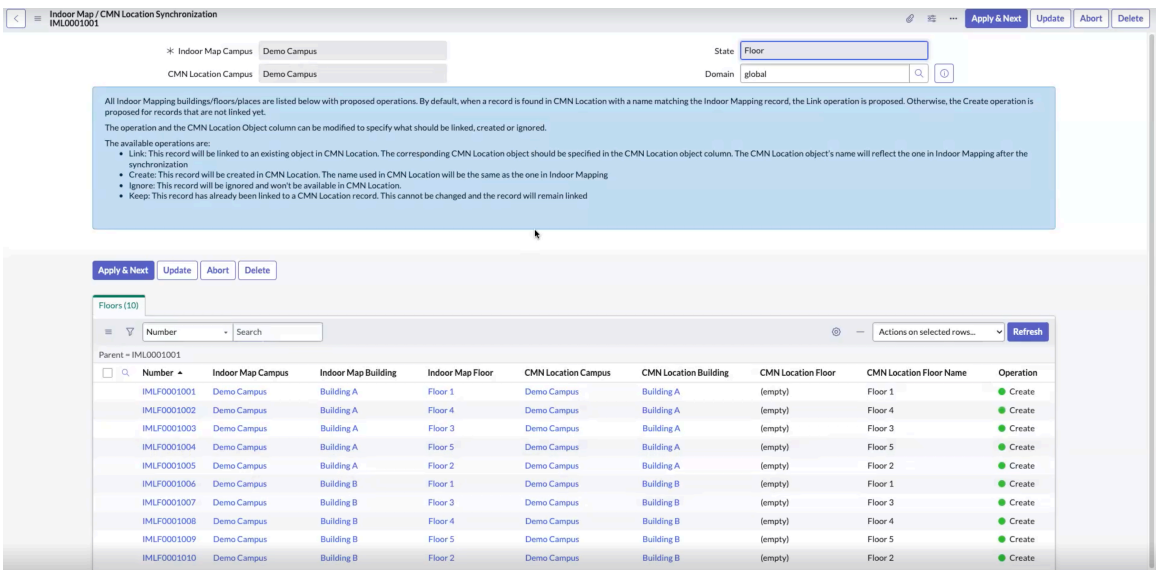
Note: The synchronization process is executed and the operation is Queued till it completes. A synchronization operation must complete before starting a new one. Don't select **Update** as synchronization of location records at this stage is incomplete. Wait for the operation to complete or till the page is refreshed with status **Complete**.



19. **Optional:** Select **Refresh** to refresh the page and see if synchronization is complete for a building.
20. Synchronization state moves to Floors.

Indoor Map / CMN Location Synchronization

Indoor Map Campus	Name of the Indoor Mapping campus is selected by default.
CMN Location Campus	Name of the CMN Location campus is selected by default.
State	Floor
Domain	Global



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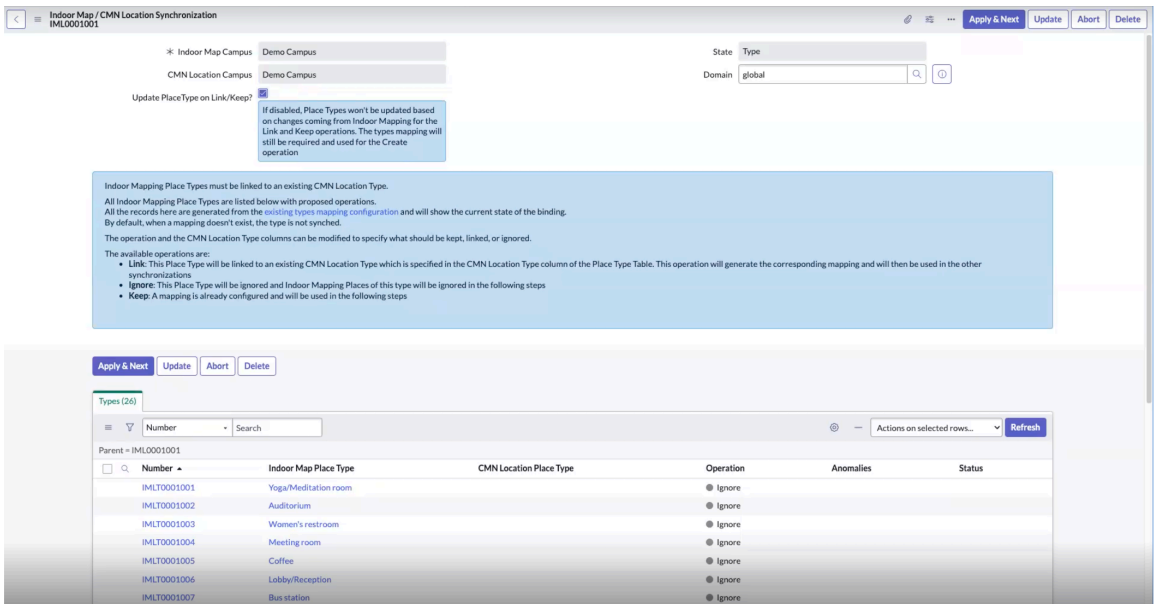
21. Select the Floors that you want to synchronize.
    Select the required operation from the proposed operation (Create, Link, Keep, Ignore) from the Related list.
22. Select **Apply & Next**.

    Note: The synchronization process is executed as per the proposed operation (Create, Link, Keep, or Ignore). Wait till the operation completes and is queued. A synchronization operation must be complete before starting a new one. Don' select **Update** as synchronization at this stage is incomplete.

23. Synchronization state moves to **Type** synchronize Indoor Mapping Place types with CMN Location Place types.

Indoor Map / CMN Location Synchronization

Indoor Map Campus	Name of the Indoor Mapping campus is selected by default.
CMN Location Campus	Name of the CMN Location campus is selected by default.
State	Type
Domain	Global



Select the required operation from the proposed operation (Create, Link, Keep, Ignore) from the Related list.

If the CMN Location Place Type column is empty, create a CMN Location Place Type to map it to corresponding Indoor Mapping Place Types. For more information, see Add CMN locations and map it to Indoor Mapping Place types.

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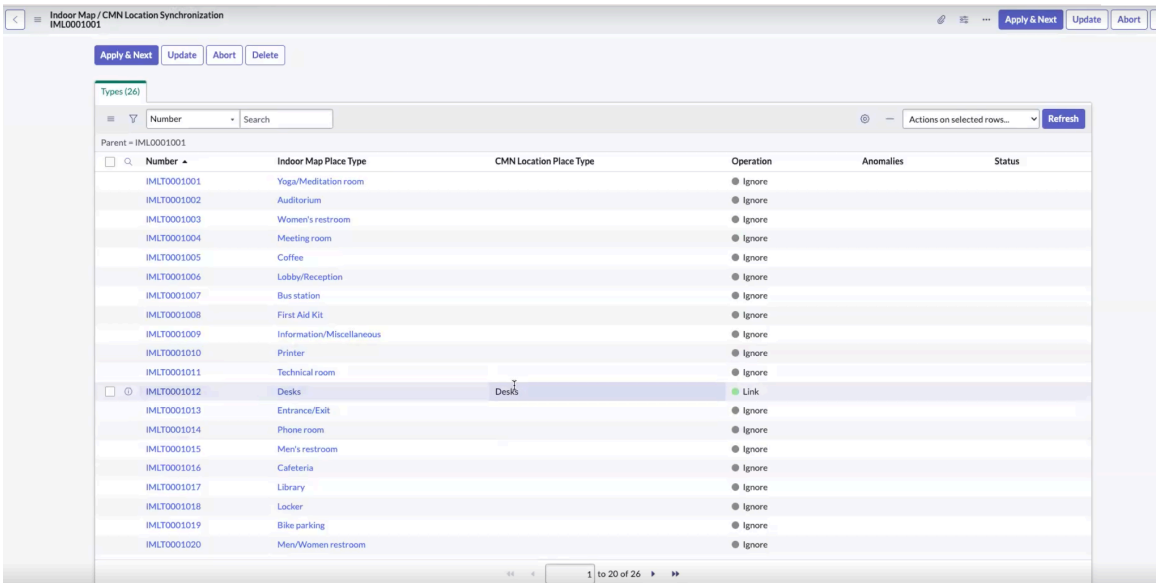

24. Select **Apply & Next**.

> **Note:** The synchronization process is executed as per the proposed operation. A synchronization operation must be complete before starting a new one. Don' select **Update** as synchronization at this stage is incomplete. Wait for the operation to complete.

25. The Synchronization state moves to **Places**.

Indoor Map / CMN Location Synchronization

Indoor Map Campus	Name of the Indoor Mapping campus is selected by default.
CMN Location Campus	Name of the CMN Location campus is selected by default.
State	Places
Domain	Global

Select the required operation from the proposed operation (Create, Link, Keep, Ignore) from the Related list.

> **Note:** The synchronization process is executed as per the proposed operation. Wait till the operation completes. **Remaining Operations** shows the progress of the synchronization process. A synchronization operation must be complete before starting a new one. Don' select **Update** as synchronization at this stage is incomplete. Wait for the operation to complete.

26. Synchronization moves to **Complete** when all location records are synchronized.
27. After synchronization is complete, verify that the CMN location Campus, buildings, Floors and Places are synchronized.

    a. To verify that the Place Types are linked, navigate to the Indoor Mapping Campus that you created in step 1 (**Demo campus**) and open the campus form.

    b. Notice that the **Location** field is having the Campus name **Demo Campus**.

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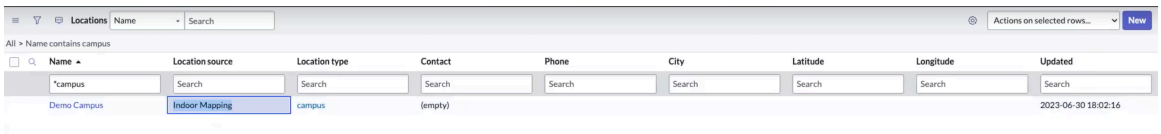
This is a reference to the Campus in CMN location and shows that the Indoor Mapping campus is linked to the CMN location.

c. The **Unlink Campus** tab is available after the synchronization is complete and the Indoor Mapping map object is linked to the CMN location indicating that the linking is complete.

Unlinking a campus unlinks all the buildings associated with a campus. Unlinking a building unlinks all the floors and spaces associated with a building. Unlinking a floor unlinks the spaces associated with a floor.

28. When the records are fully synchronized, the CMN Locations table shows the Location source column as Indoor Mapping.



29. **Optional:** To make a synchronization record as favorite, complete the steps.

a. Select the List controls icon ( ) and select **Create favorite** to easily locate your sync record.

b. Select a color, if required.

c. Select **Ok**.

(Optional) For more information about synchronizing Indoor Mapping locations with Workplace Indoor Mapping, see Synchronize Indoor Mapping with Workplace Service Delivery.

30. To add a place or location to an Indoor Mapping building, navigate to **All** > **Indoor Mapping** > **Map Studio**.

a. Select the building to add a place or location.

b. Select Manage places.

c. Select the floor to be displayed on a map.

d. Click **New point** or **New polygon** to start creating places and new points of interest.

For more information, see Manage places.

31. After adding the places or locations in Indoor Mapping Map Studio, synchronize the places with CMN locations for a building or campus.

Using enhanced synchronization

Synchronize your workplace locations with your Indoor Mapping data by using the enhanced sync feature.

To use the enhanced sync feature, you must have completed the initial manual sync to link Indoor Mapping and WSD. You must have the sn_wsd_indoor_map.admin role or the sn_wsd_core.workplace_manager role to access the relevant modules.

⚠ **Warning:** Ensure that you have a one-to-one relationship between Space Types and Place Types for the bidirectional functionality to work.

To use the enhanced sync feature, see the following steps.

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1. Configure the Enhanced Sync properties to define the behavior of the sync operations between Indoor Mapping and Workplace Service Delivery.

   For more information about the Enhanced Sync properties, see Enhanced Sync Properties.

2. Update data in Workplace Core.

   Updates to the location hierarchy objects in Workplace Core are synced to the Indoor Mapping objects based on the sync properties. These objects include the names and titles of Campuses, Buildings, Floors, and Spaces.

   The Place Type attribute is also updated in Indoor Mapping when the Space Type value for a Workplace Space is updated. When a Space in Workplace Core is deleted or changed to retired status, the related Indoor Mapping place is deactivated.

3. Update data in Indoor Mapping Indoor Mapping.

   Updates to the location hierarchy objects in Indoor Mapping are synced to Workplace Core based on the sync properties. These objects include field values like the name and title.

   The Place Types are synced from Indoor Mapping places to Workplace Core. Objects are created in Workplace Core when they're created in Indoor Mapping. For example, if an update to a CAD file introduces three new Indoor Mapping places, the three places are created as Workplace Spaces based on the sync properties.

   Place Properties are synced to the mapped fields in Workplace Core as configured in the Indoor Place Properties Mapping. For example, square feet (SQ FT) or square meters (SQ M) calculated from the CAD surface area information. When a Place in Indoor Mapping is deleted or its deactivated, the related Workplace Space is Retired.

4. Review pending sync operations to process or ignore the operations.

   For more information about Enhanced Sync operations, see Manage enhanced sync operations.

5. Review the sync activities for information about the updates made to Indoor Mapping and Workplace Core as part of enhanced sync.

   You can view the sync activities by navigating to **All** > **Workplace Core** > **Enhanced Sync** > **Enhanced Sync Activities**.

   The Enhanced Sync Activities list contains information about sync operations like the timestamp, the impacted table, and the workplace location.

6. Review the sync error logs for informational messages, warnings, or errors.

   (Optional) You can view the sync error logs by navigating to **All** > **Workplace Core** > **Enhanced Sync** > **Enhanced Sync Error Logs**.

Manage enhanced sync operations

Review pending sync operations and decide whether to process or ignore the operation.

Before you begin

Role required: sn_wsd_indoor_map.admin or sn_wsd_core.workplace_manager

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Procedure

1. Navigate to **All** > **Workplace Core** > **Enhanced Sync** > **Enhanced Sync Operations**.
2. Filter the list to include the records that you want to process.

   Only the records that are included in the filter are processed. For more information about filtering lists, see Create a filter in List.

   Review the pending operations, which include Workplace Space retirements or Indoor Mapping Place deactivations.
3. Edit the operation based on your requirement.
   Records that have the operation set to **Ignore** aren't processed.
4. Select **Process Pending**.

Important: Only the records that are included in the filter are processed.

Result

Pending records that are set to Retire or Deactivate are processed and are synchronized with Indoor Mapping or Workplace Core.

If some records aren't processed, you can review the error logs. You can view the sync error logs by navigating to **All** > **Workplace Core** > **Enhanced Sync** > **Enhanced Sync Error Logs**.

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Autocad tool

Autocad tool in Indoor Mapping v1.7.0 and earlier versions. It provides the ability to import the CAD file to Map Studio and make few configuration changes to places and file size units.

For information about the Autocad import tool in Indoor Mapping v1.8.0, see Autocad import tool.

Import CAD files to Map Studio

Create a campus, add few buildings and floors to the campus. Upload your CAD floor plan to make configuration changes and preview the CAD design layout.

Before you begin

After making the required place type and file unit size changes, import it to the Map Studio to complete your building configuration. View the updated changes to places and place types in the Map studio (**Manage Workplace** > **Places**).

Role required: map editor, map admin, map editor limited

Procedure

1. Navigate to **All** > **Indoor Mapping** > **Map Studio**.
2. Create a Campus, add few buildings and floors to a campus or select an existing campus.
   For more information, see Create a campus with buildings and floors
3. Navigate to **Manage workplace** > **Floors and Floor plans**.
4. **Optional:** If you want to add a floor, select **Add a floor** option.
5. Select **Upload** to upload the CAD source file.
   For example: demo.dwf
6. Complete the following information:

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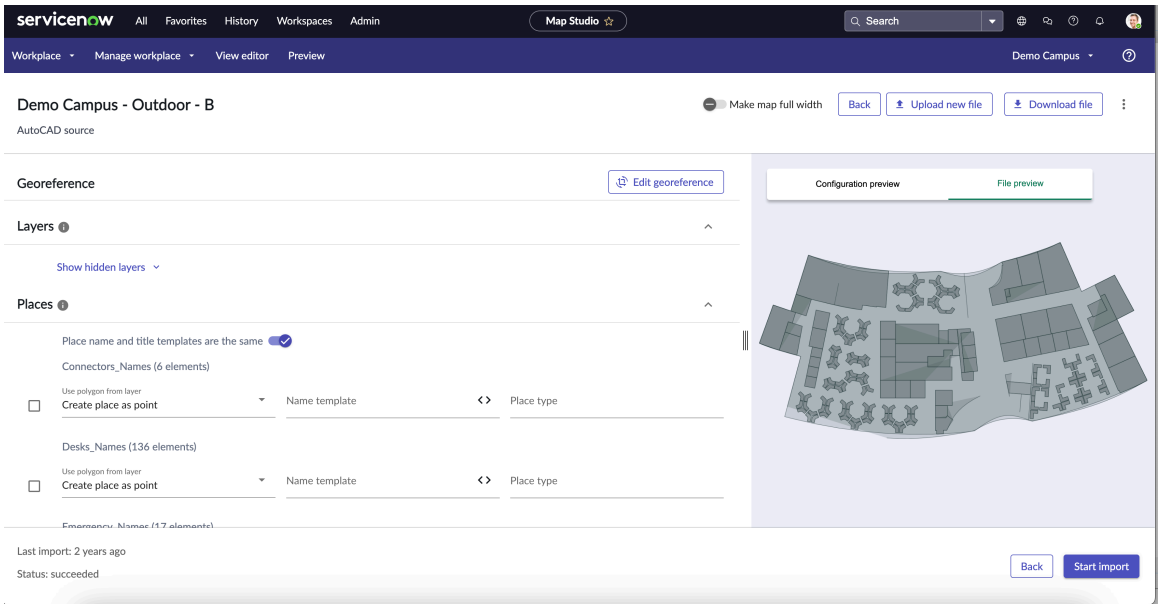
a. **File**: Name of the CAD source file.
By default, the name of the source is the <campus name-floor title-file name>. For example, Lawson-B12.dwg

b. **Name**: Campus name.

7. Click **Save**.
A message with a clickable link to review the AutoCAD guidelines is displayed.

   Review the guidelines before uploading the CAD file.

8. Upload process may take sometime to complete depending on the CAD file size.
9. After the upload process is complete, select **Configure**.
In case of large files, the configuration process may take some time to complete.
10. The AutoCAD source page displays the following options:



- Georeference: Option to edit position and adust the location pins for a location.
- Layers: Option to configure layer types that you want to display on the global map.
- Places: Option to configure places that you want to display on the global map.
- Configuration preview: CAD file configuration preview.
- File preview: After making the required changes to Layers and Places, preview your changes on the Configuration preview layout.

11. Select **Edit georeference** to move the location pins and position the floor on the global map (OpenStreetMap).
If location pins are not positioned, warning message **Not Configured yet** is shown.

    on the form, fill in the fields

Edit georeference

Field	Description
Display	From the drop-down option, select a floor or floors in a building. Enable the toggle

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Field	Description
	option to display buildings and floors on the map. Drag and move around to position the location pins as required.
Align with other sources	Select the campus or map objects from the list. Select **Align** to align your floor plan with the shape and size of a building on the global map.

a. Click **Save**.

12. To preview the CAD file, select the following options:
    a. **To be imported**: Dynamic preview will change based on the selections that you make.
    b. **Uploaded**: Shows the preview for the uploaded CAD source file.
13. Select the required layers from the **Layers** section that you want to display on the map.
    A warning message is displayed if there are too many layers on your CAD source file. Select only the required layers.
14. To visualize CAD elements within each layer, select the **Make map full width** option.
15. Configure place type configuration using the **Places** section.
16. Select the Places from the list that you want to display on the map.
    On the form fill in the field

Places

Field	Description
Use polygon from layer	Layer on which the place shapes are located.
Title template	Required title template from the list of available templates.
Place Type	Place type to categorize the place type on the map. For example: Auditorium.

17. Repeat the steps for places that you want to import and display on the map in the Map Studio.
18. **Optional:** Although the CAD import requirements state that polylines need to form closed shapes in order to create polygons, if some polylines are not properly closed in the file, Indoor Mapping offers a property to automatically close these shapes.
19. **Optional:** Enter the maximum distance between two points on the map and the system will close the points.
20. **Optional:** If there is a small disconnect between the first and last point, you can correct this by modifying the sys_property automatically converting lines to polygon while importing a CAD file.

    a. Navigate to **All** > **Indoor Mapping** > **Indoor Mapping properties**.

    b. Search for **sn_map_core.line_to_polygon_max_distance**

    (Optional) This property indicates the maximum distance in centimeters between the first and last point to convert a line to a polygon while importing an AutoCAD file.

    c. Provide a value to this property within a range 1-100.

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(Optional) For example: Set the sn_map_core.line_to_polygon_max_distance to 15.

d. Import the CAD file again and confirm that both the places are converted to Polygon now.

21. Select **Start Import**.
22. After import is complete, select **Manage Workplace** and select **Overview**.
23. Click on the building that you created.
    Your map is now available on the Map Studio with the CAD changes.
24. **Optional:** On the CAD configuration page menu, select the following options, as required:
    - **Upload new file** to upload a new floor plan.
    - **Download file** to download the CAD file.
    - **Make a map full width** to view the CAD file in full mode.
25. **Optional:** Select the More actions menu icon ( ):
    - Edit name: Option to edit the CAD source name. Select **Save** after you update the name.
    - Edit floor: Option to edit source floor. Select **Save** after updating the floor name.
    - Edit file encoding: Option to edit source file encoding. Select a standard encoding format for your file. Select **Save and upload**.
    - Edit file unit: Option to edit the CAD file unit. For example: Inches, feet, centimeters, and so on.
    - Use new AutoCAD tool: Option to switch and navigate to the new Autocad processor configuration page to manage, edit, and optimize the layers, places, and objects in your CAD file.
    - Delete: Option to delete the CAD source file.

    The CAD file is loaded into the Map Studio and the configuration for layers, layer types, and places is created. The application automatically applies the same configurations to subsequent floors that are imported. This is helpful in speeding up configurations of buildings that have multiple floors and where all the CAD files have similar layers. If the CAD layers within the subsequent files have the same layer names as the layers within the initial file, then layers, layer types, and places is pre-filled with the same values as those in the initial file.

Indoor Mapping references

Learn more about the Indoor Mapping basic indoor mapping terms, and the components installed with indoor maps like roles, tables, and properties.

Map components installed with Indoor Mapping

Several types of components are installed with the Indoor Mapping application, including user roles, tables, and scheduled jobs.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this plugin.

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Roles installed

User roles installed with Indoor Mapping

Role title [name]	Description	Contains roles
Indoor Mapping administrator sn_map_core.map_admin	• Sets up the map data and objects in Indoor Mapping Map Studio. • Has complete access to the application.	user_criteria_admin Can manage the User Criteria records.
Map editor sn_map_core.map_editor	Sets up maps in the Indoor Mapping Map Studio, imports floor plans, and can manage maps (edit or delete) in the Map Studio.	Not applicable.
Map editor limited sn_map_core.map_editor_limited	Limits the access to a campus and can only view and edit campuses that are assigned to this role. Users with this role cannot view or update all campuses or map objects in Map Studio.	Not applicable
Map Printer sn_map_core.map_printer	Allows users to access the map printing page and print maps.	None

Tables installed

Table components installed with Indoor Mapping

Table	Description
AutoCAD Source [sn_map_core_autocad_source]	Provides the needed data and the user setup for an Autocad file to generate (import) places and layers.
Autocad source block [sn_map_core_autocad_source_block]	Automatically generated after an Autocad file upload, provides the data needed to extract autocad blocks into map places.
Autocad source layer [sn_map_core_autocad_source_layer]	Automatically generated after an Autocad file upload, provides the data needed to extract autocad layers into map layers.
Autocad source text [sn_map_core_autocad_source_text]	Automatically generated after an autocad file upload, provides the data needed to extract autocad texts into map places.
Campus [sn_map_core_campus]	Provides the campus name, address and geometry. A campus contains a set of buildings.

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Table components installed with Indoor Mapping (continued)

Table	Description
Building [sn_map_core_building]	Provides the building name, campus, address and geometry. A building contains a set of floors.
Floor [sn_map_core_floor]	Provides the floor name and number. A floor contains a set of places.
Font [sn_map_core_floor]	Manage fonts for indoor maps.
Connector [sn_map_core_connector]	Manage connector and connector types to a building like stairs, escalators, elevators, and stairs.
Connector Type [sn_map_core_connector_type]	Organizes connectors into types to provide a common style and information like waiting time and the direction of the connectors, for example: elevator.
Direction Mode sn_map_core_direction_mode	Defines the route preferences, for example: accessible.
Icon [sn_map_core_icon]	Provides an icon to be used on the map for places, buildings, campuses, connectors and direction modes.
Tile [sn_map_core_tile]	Automatically generated after a raster_source is imported, provides the location and image for the tiles generated for the imported layer.
Job [sn_map_core_job]	Manage jobs.
View content [sn_map_core_view_content]	Provides a style and content for a campus displayed in a view type. The style can be provided for the campus, building, place, connector, layer, place type, connector type and layer type.
Layer [sn_map_core_layer]	Manage floor plan layer.
Layer type [sn_map_core_layer_type]	Organizes layers into types to provide a common style.
Place	Provides the place name and geometry.

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Table components installed with Indoor Mapping (continued)

Table	Description
[sn_map_core_place]	
Place type [sn_map_core_place_type]	Organizes places into types to provide a common style.
View type [sn_map_core_view_type]	Provides multiple styles for the same campus. It can also be used to display a different content for the same campus.
Entrance []sn_map_core_place_entrance	Provides the locations of the place entry.
Place Marker [sn_map_core_place_marker]	Provides the locations of the place marker
Node [sn_map_core_node]	Provides the location of a node in the direction graph.
Routes [sn_map_core_route]	Provides a path between two nodes.
Raster source [sn_map_core_raster_source]	Provides the needed data and the user setup to generate (import) an image layer.
Campus editor sn_map_core_m2m_campus_editor	Enables users to edit a campus using user criteria.
Connector to direction mode associations [sn_map_core_m2m_connector_direction_mode]	Manage connectors and direction modes on a building.
Route to direction mode associations [sn_map_core_m2m_route_direction_mode]	Maps routes with relevant direction modes.
View type and Campus to direction mode associations [sn_map_core_m2m_view_type_campus_direction_mode]	Allows a direction mode to be used inside a campus displayed with a view type.
View type reader [sn_map_core_m2m_view_type_reader]	Allows a users to display a view type using a user criteria.
View type and campus to user criteria associations	Allows users to display a campus with a view type using a user criteria.

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Table components installed with Indoor Mapping (continued)

Table	Description
[sn_map_core_m2m_view_type_campus_reader]	
Font [sn_map_core_font]	Required fonts for outdoor styles.
Outdoor style [sn_map_core_outdoor_style]	Defines the style of the street map displayed behind the indoor map.
Snapshot sn_map_core_snapshot	Creates snapshot to migrate data across instances.
Place properties mapping sn_map_core_place_properties	Extracts room dimensions from a CAD source file.
CAD Configuration item [sn_map_core_cad_configuration_item]	Internally used by the Map Studio to save configuration made for an Autocad source.
CAD Diff sn_map_core_cad_diff	Internally used by Map Studio to save the changes made to an Autocad source in the CAD Editor.
Indoor Map / WSD Synchronization [sn_wsd_indoor_map_sync]	Synchronizes Indoor Mapping map data with Workplace Service Delivery data.
Indoor Map / WSD Buildings Synchronization [sn_wsd_indoor_map_building_sync]	Synchronizes Indoor Mapping building data with Workplace Core building data.
Indoor Map / WSD Cleaning [sn_wsd_indoor_map_clean_sync]	Table used by the synchronization process between Indoor Mapping and Workplace Service Delivery. Cleaning step is a part of the synchronization process.
Indoor Map / WSD Floors Synchronization [sn_wsd_indoor_map_floor_sync]	Synchronizes Indoor Mapping floor data with Workplace Core floor data.
Indoor Place Properties Mapping [sn_wsd_indoor_map_place_properties_mapping]	Indoor Mapping properties.
Indoor Map / WSD Spaces Synchronization [sn_wsd_indoor_map_space_sync]	Synchronizes Indoor Mapping spaces data with Workplace Core space data.
Indoor Map / WSD Types Synchronization [sn_wsd_indoor_map_type_sync]	Synchronizes Indoor Mapping place types data with Workplace Core space types data.

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Table components installed with Indoor Mapping (continued)

Table	Description
Indoor Map / CMN Location Buildings Synchronization [sn_map_core_building_sync]	Synchronizes Indoor Mapping building data with CMN location buildings data.
Source [sn_map_core_source]	Parent table for all kind of sources in Indoor Mapping. Sources are files (raster or PNG files or CAD files) that can be imported to create floor plans.
Autocad source [sn_map_core_autocad_source]	Stores Autocad file and data about the file.
Autocad source block [sn_map_core_autocad_source_block]	Internally used by Map Studio. Stores information about block references present in an Autocad file.
Autocad source layer [sn_map_core_autocad_source_layer]	Internally used by Map Studio. Stores information about layer configuration present in an Autocad file.
Autocad source text [sn_map_core_autocad_source_text]	Internally used by Map Studio. Stores information about text present in an Autocad file.
Print Request [sn_map_core_print_request]	Internally used by the Indoor Mapping application. Stores information about print requests that are raised by users.

Scheduled jobs

Scheduled jobs installed with Indoor Mapping

Scheduled job	Description
Clean old Indoor Mapping tiles (old versions > 3 days)	A schedule job is running every days to purge data that are not relevant anymore in the tiles table. The tiles tables stores data generated from PNG file import process. When a new PNG is upload to retrieve an existing one, previous generated tiles are not used anymore and therefore, will be purge by the scheduled job.
Sync script Notification	A notification is sent to the administrator if changes were made to Indoor Mapping map data objects and the synchronization script is not run. The notification reminds the administrator that the data might not be in synchronized and that the synchronization process must be run.

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Indoor Mapping terminology

Key terms used in Indoor Mapping.

Terms used in Indoor Mapping

Terms	Descriptions
Blocks	Blocks are an Autocad feature which groups text element of a CAD file together to create blocks for desks, meeting rooms, etc.
Boundary	Represents the limit of a campus or building.
Building	Represents a physical building. A campus may contain multiple buildings. A building can have multiple floors. **Note:** A building must belong to a campus.
Campus	A campus contains a set of buildings and outdoor elements like: • Places that represent outdoor points or place types. For example: bus stop, fire hydrant, visitor gate, and so on. • Layers representing outside elements in buildings. For example: walking paths, trees, park, and so on. • Nodes and routes to represent possible directions in buildings.
Campus (Outdoor)	Campus (outdoor) are the graphic elements (e.g. trees or logos) or Places (e.g. bus stop, restaurant) placed on the world map. Outdoor elements do not depend on a building floor and are displayed.
Connectors	Defines the physical means to change floors (e.g. stairs, escalators, ramps or elevators). Connectors are added on the direction graph nodes.
Connector types	Defines the kind of connectors available in an instance (e.g. ramps, escalators, elevators, etc.). A connector type contains the style (icon) and properties for each connector. New connector types can be created at the instance level.
Directions or Direction graph	Represents a set of connected lines and nodes created in Map Studio to provide Wayfinding on the map.
Direction Modes	Defines multiple modes of directions or means of transportation (for example Pedestrian, Accessible, Bike, Truck etc.). Extra modes can be created at the instance level.
Entrance (Polygons)	Polygon entrances define where the door of a space is located so that the wayfinding engine enters the room accordingly.
Floor	Represents a floor of a particular building.
Floor plan sources	Defines the original data source or file to import in Map Studio in order to create an Indoor Map. It can either be a PNG or DWG/DXF.

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Terms used in Indoor Mapping (continued)

Terms	Descriptions
Floor controller	Represents a list of floors or buttons to click on to visualize the different building levels.
Georeference	Action of positioning a floor plan at its exact location on the world map.
Indoor mapping application	The Indoor Mapping application is the plugin that must be installed in order to have Map Studio and configure an Indoor Map.
IPS	Indoor Positioning System also known as the technology providing the blue dot on the map.
Layers	Layers are part of the CAD file and represent the elements of a floor plan (e.g. Pipes, rooms, columns, etc.)
Layer Type	Defines type of layers like walls, columns, heating pipes, and so on. They are defined at the instance level. They are used to categorize the imported elements and to style them (CAD import only).
Map Studio	Map Studio is the tool to create, edit and maintain Indoor Maps.
Marker	A marker is a pin placed on a campus/building/polygon to display the icon and the title.
Name	The name is an admin ID for an imported or created element (e.g. name of a place).
Nodes	Defines points along the direction graph. Nodes are also used to create connectors to change floor.
Outdoor style	Represents the “outside” in between buildings (default, open street map, etc). New outdoor styles can be created at the instance level.
Places	Places refer to any element placed on the map that users will be able to search for. It can be a meeting room, library, park etc. Places are either polygons or points. They can be automatically imported from a CAD file or manually created on Map Studio.
Place Types	Place Types are added to points of interest to categorize and style them with the right icon and color. New Place. Types can be created at the instance level.
Polygon (places)	A polygon is made of a pin and a shape. Polygons are mandatory for meeting rooms to have a shape to color green or red according to the booking status.
Point (places)	A point is a pin placed on the map that does not have a shape around it.
Raster image file	Supports import of raster PNG image for main floor plan. The raster image provides one raster tile layer for a floor.
Segment or Route	Defines a line between two nodes.
Style editor	To create, configure and style a view.

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Terms used in Indoor Mapping (continued)

Terms	Descriptions
Text	Text is an AutoCAD feature used to add text elements on a CAD layer. That way, users can create Text elements for desks, meeting rooms and so on.
Tile	The title is what will be displayed on the map to end users (e.g. title of a place).
View	A view is composed of content and style that will be displayed for certain users. Views are configured in the style editor. For example, admins can create an Employee view type and go to the style editor to decide what they want to display in that view. They can also select the style of these elements for that view.
View types	Provides a name to a specific view (e.g. Employee, maintenance, etc.). View types can be created at the instance level.
Wayfinding	Automated algorithm displaying a path between an origin and a destination. Wayfinding is different from Indoor Positioning and doesn't contain a blue dot.
Zoom Level / Default Zoom	Defines at which Zoom levels certain elements will be displayed or at which Zoom level a campus will open.

Snapshot Impacted tables

Few Indoor Mapping and Workplace Indoor Mapping tables are impacted during the snapshot process when the Indoor Mapping backup data is migrated to Workplace Service Delivery instances.

Workplace Indoor Mapping Tables

The following tables are affected during the snapshot process.

- sn_wsd_core_campus
- sn_wsd_core_building
- sn_wsd_core_floor
- sn_wsd_core_space
- sn_wsd_core_area

Indoor Mapping Tables

The following tables are affected during the snapshot process.

- sn_map_core_campus
- sn_map_core_building
- sn_map_core_floor
- sn_map_core_node
- sn_map_core_route
- sn_map_core_connector

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- sn_map_core_m2m_route_direction_mode
- sn_map_core_layer
- sn_map_core_tile
- sn_map_core_autocad_source
- sn_map_core_autocad_source_layer
- sn_map_core_autocad_source_block
- sn_map_core_autocad_source_text
- sn_map_core_geojson_source
- sn_map_core_raster_source
- sn_map_core_job
- sn_map_core_place
- sn_map_core_place_entrance
- sn_map_core_place_marker
- sn_map_core_place_properties
- sn_map_core_view_content
- sn_map_core_m2m_campus_editor
- sn_map_core_m2m_view_type_campus_direction_mode
- sn_map_core_m2m_view_type_campus_reader

Related topics

Create Snapshots to migrate Indoor Mapping data

Map printing options

The map printing options provide configurations for the page format, font, icons, collision, legend, and timestamps.

Page Format options

Field	Description
Page Orientation	Orientation that you want to print the page in. The orientation can be landscape or portrait.
Page Size	Paper size that you want to use to print the map.

Page Content options

Field	Description
Add page title	Option to display the title on the map.
Add timestamp	Option to display the print timestamp to the map.
Include legends	Option to enable the map legend.

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Page Content options (continued)

Field	Description
Keep legends in a separate page	Option to move the legend to the second page of the print layout. This field appears only if **Include Legends** is selected.
Include directions	Option to display directions between the points selected in the location directory. This field appears only if your map contains directions between locations.
Include To and From info	Option to display the info card for the points selected in the location directory. This field appears only if **Include directions** is selected.
Replace space titles by numbers	Option to change the location names to numbers. Enabling this option modifies the legend with the numbers and associated location labels.

More options

Field	Description
Space label text size	Size of the location labels on the map.
Space marker size	Size of the location icons on the map.
Legend label text size	Size of the map legend text.
Legend label icon size	Size of the map legend icons.
Remove text anti-collision	Option to enable overlapping of location labels. You can enable this option and adjust the font size to avoid collision.
Remove icon anti-collision	Option to enable overlapping of location icons. You can enable this option and adjust the icon size to avoid collision.

Floor map import group form

You can specify details about the import group and select users who must be notified of the import progress.

Floor plan import group form

Field	Description
Number	Identifier of the import group record. This field is auto-generated and can't be edited.
Name	Name of the import group.
Notify User	Option to notify the specified user about the import progress.

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Floor plan import group form (continued)

Field	Description
User to notify	System user who must be notified about the import progress.
Supervised AI execution	Option to specify whether the Automate map updates AI agentic workflow must be triggered manually or automatically.
AI Agent instructions	Special instructions for the AI agent in the Automate map updates AI agentic workflow.
State	State of the import process. This field is automatically set to Draft and can't be edited.
Remaining tasks	Number of tasks remaining in the import process. This field is auto-generated based on the Floor plan import tasks and can't be edited.

Enhanced Sync Properties

You can define the behavior of sync operations by configuring the Enhanced Sync properties.

To access the Enhanced Sync properties, navigate to **All** > **Workplace Core** > **Enhanced Sync** > **Enhanced Sync Properties**

You must have the sn_wsd_indoor_map.admin role or the sn_wsd_core.workplace_manager role to configure the enhanced sync properties.

Indoor Mapping to WSD sync properties

Property	Description
sn_wsd_indoor_map.es_automate_create	Enables the creation of WSD location records as part of the sync process. You can enter the following options to enable creation of location records. • building • floor • space You can enter multiple options by separating them with a comma.
sn_wsd_indoor_map.es_automate_update	Enables the updating of WSD location records as part of the sync process. You can enter the following options to enable updating of location records.

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Indoor Mapping to WSD sync properties (continued)

Property	Description
	• campus • building • floor • space You can enter multiple options by separating them with a comma.
sn_wsd_indoor_map.es_automate_retire	Enables the retirement of WSD location records as part of the sync process. All retirements require review and acknowledgment. You can enter the following options to enable retirement of location records. • building • floor • space You can enter multiple options by separating them with a comma.
sn_wsd_indoor_map.es_sync_activity_enabled	Option to log activities for enhanced sync. You can view the enhanced sync activities by navigating to **All** > **Workplace Core** > **Enhanced Sync** > **Enhanced Sync Activities**.
sn_wsd_indoor_map.es_automate_link	Enables or disables the linking of WSD location records as part of the sync process. You can enter the following options to enable updating of location records. • campus • building • floor • space You can enter multiple options by separating them with a comma.

WSD to Indoor Mapping sync properties

Property	Description
sn_wsd_indoor_map.es_sync_name_to_im	Enables synchronizing name changes from WSD to Indoor Mapping.

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WSD to Indoor Mapping sync properties (continued)

Property	Description
	You can enter the following options to enable synchronization of location records. • campus • building • floor • space You can enter multiple options by separating them with a comma.
sn_wsd_indoor_map.es_sync_title_to_im	Enables synchronizing title changes from WSD to Indoor Mapping. You can enter the following options to enable synchronization of location titles. • campus • building • floor • space You can enter multiple options by separating them with a comma.
sn_wsd_indoor_map.es_sync_spacetype_to_im	Enables synchronizing space-type changes from WSD to Indoor Mapping.
sn_wsd_indoor_map.es_default_space_type	WSD space type to be used when no place type mapping is found.
sn_wsd_indoor_map.es_automate_deactivate	Enables the deactivation of Indoor Mapping records as part of the sync process. You can enter the following options to enable deactivation of Indoor Mapping records. • campus • building • floor • space You can enter multiple options by separating them with a comma.

Bulk upload Excel columns

Use the bulk upload template to provide information about your campuses, buildings, and floors.

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Campus template columns

Column	Description
Campus Name	Unique identifier of the campus. This column is limited to 255 characters.
Campus Title	Title of the campus that is displayed on the map views.
Campus Address	Physical address of the campus. This column is optional.
Country	Country in which the campus is located. You must use the ISO 3166-1 Alpha-2 code for the country.
Marker latitude	Geographic latitude coordinate for the campus in the decimal degrees format.
Marker longitude	Geographic longitude coordinate for the campus in the decimal degrees format.
Enable in Kiosk View	Option to enable the campus for the Kiosk Indoor Mapping feature. You must fill in YES or NO in this column.
Enable in Scenario View	Option to enable the campus for the Scenario Planning feature. You must fill in YES or NO in this column.
Enable in Default View	Option to enable the campus for the Default Indoor Mapping feature. You must fill in YES or NO in this column.

Building template columns

Column	Description
Building Name	Unique identifier for the building. This column is limited to 255 characters.
Building Title	Title of the building that is displayed on the map views.
Campus Name	Name of the campus in which the building is located. The name must match an existing campus.
Building Address	Physical address of the building. This column is optional.
Marker latitude	Precise latitude coordinate for the building in the decimal degrees format.
Marker longitude	Precise longitude coordinate for the building in the decimal degrees format.
Enable in Kiosk View	Option to enable the building for the Kiosk Indoor Mapping feature. You must fill in YES or NO in this column.

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Building template columns (continued)

Column	Description
Enable in Scenario View	Option to enable the building for the Scenario Planning feature. You must fill in YES or NO in this column.
Enable in Default View	Option to enable the building for the Default Indoor Mapping feature. You must fill in YES or NO in this column.

Floor template columns

Column	Description
Floor Number	Unique numerical identifier for the floor.
Floor Name	Name of the floor. This column is limited to 255 characters.
Floor Title	Title of the floor that is displayed on the map views. This column is optional. If this column is empty, the Floor Name is displayed on the map views.
Floor Short Title	Abbreviated title of the floor. This column is optional. If this column is empty, the Floor Number is used for identification.
Building Name	Name of the building in which the floor is located. The name must match an existing building
Campus Name	Name of the campus in which the building is located. The name must match an existing campus.
Source File Name	Name of the CAD file that contains the floor plan.
Source File Unit	Unit of measurement used in the source CAD file. You must select from the following: • INCHES • FEET • METERS • DECAMETERS • MILES • LIGHT_YEARS • KILOMETERS • US_SURVEY_YARD • ANGSTORMS

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Floor template columns (continued)

Column	Description
	• UNDEFINED • HECTOMETERS • MILLIMETERS • PARSECS • MICROINCHES • US_SURVEY_MILE • NANOMETERS • GIGAMETERS • CENTIMETERS • US_SURVEY_FEET • MILS • MICRONS • FEET • ASTRONOMICAL • US_SURVEY_INCH • YARDS • DECIMETERS If this column is empty, INCHES is used as the source file unit.
Enable in Kiosk View	Option to enable the floor for the Kiosk Indoor Mapping feature. You must fill in YES or NO in this column.
Enable in Scenario View	Option to enable the floor for the Scenario Planning feature. You must fill in YES or NO in this column.
Enable in Default View	Option to enable the floor for the Default Indoor Mapping feature. You must fill in YES or NO in this column.

Workplace Central

Maintain workplaces more efficiently using a single workspace, Workplace Central. As an admin, workplace manager, space planner, lease administrator, or lease manager, you can use the Workplace Central application to perform workplace-related activities like planning, monitoring, viewing, and optimizing workplaces in less time.

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Get started

Explore  Learn about Workplace Central concepts and features.	**Configure**  Install Workplace Central and related plugins to get started.	**Use**  Use Workplace Central to efficiently perform workplace-related activities.
Manage  Manage workplace-related activities. View metrics and the list of activities that have been created.	**Components**  Get details about the components installed and key features of Workplace Central.	

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Workplace Central

Workplace Central is a one-stop application where you can view key metrics, and access or control all your workplace-related operations.

Install the Workplace Central (sn_wsd_central) plugin from the ServiceNow Store.

As a workplace manager, the Workplace Central makes it easier for you to configure, perform, monitor, and run all your workplace activities efficiently from a single workspace. The application helps you save time without the need to navigate to different places to perform any workplace-related action. For example, you can plan a scenario, track the scenario metrics, analyze workplace activities, monitor workplace maintenance plans, and more.

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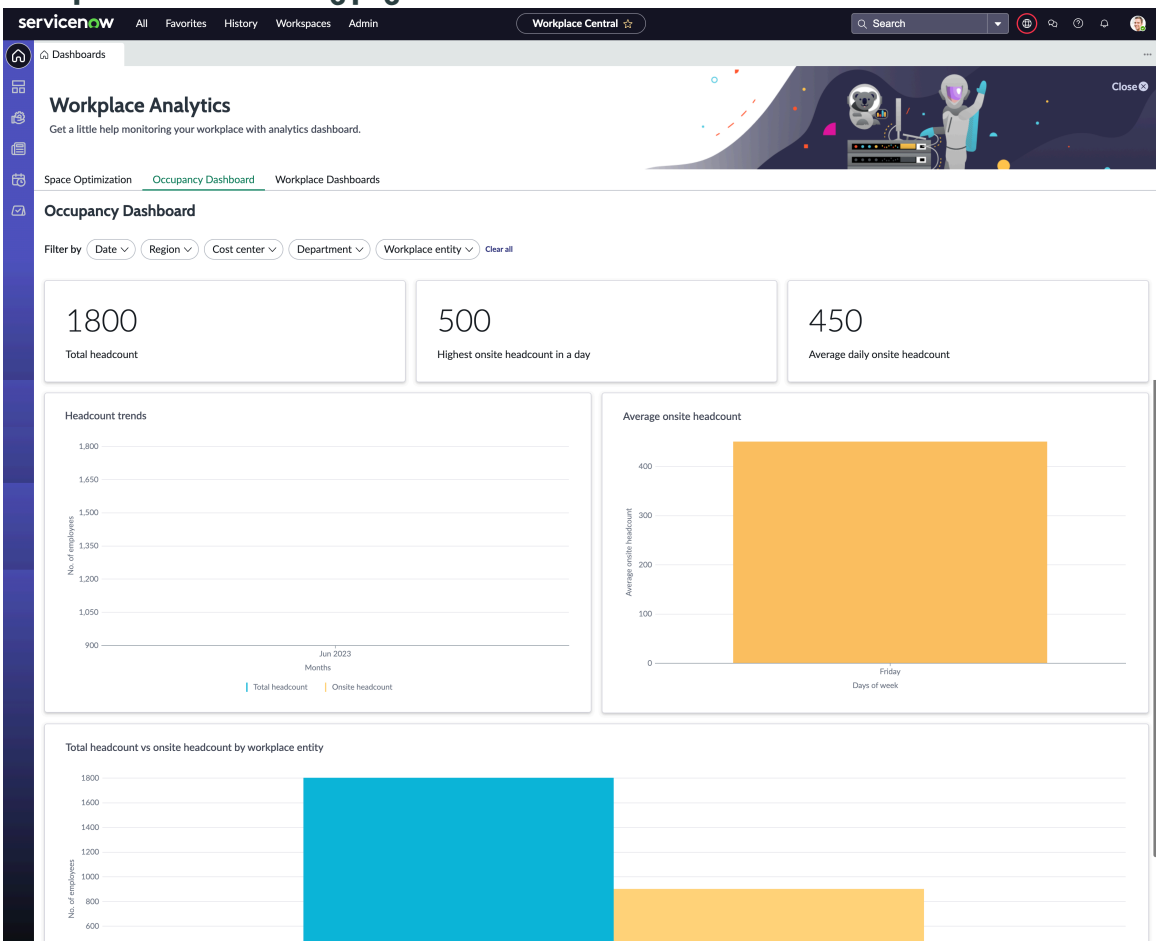
Workplace Central landing page



Using the Workplace Central application, you can perform the following:

- Plan scenarios using the Scenario planning feature available with the Space optimization module. This module provides the collective information for all the scenarios created, published, deployed, and archived in the system.

  For more information about scenario planning and the Space optimization module, refer to Scenario Planning.

- You can track scenario metrics on the Space Optimization module and also view the scenarios individually.
- Work on space assistance requests.
- View and track space allocation requests.
- Deploy space requests to implement the allocation changes specified in requests.
- You can create, track, and manage the workplace contracts with the Lease Administration application.
- View a key metrics dashboard for Space Optimization, Lease Administration, and Maintenance Management. For more information, see Working with Workplace Analytics.
- Create move projects to track workplace move requests at a time. Collate move requests under a project using filter conditions and monitor their fulfillment. For more information, refer to Move Management.
- Schedule move requests if necessary.
- Track the progress of move requests and work on them based on priority and the dates on which they are expected to be fulfilled.

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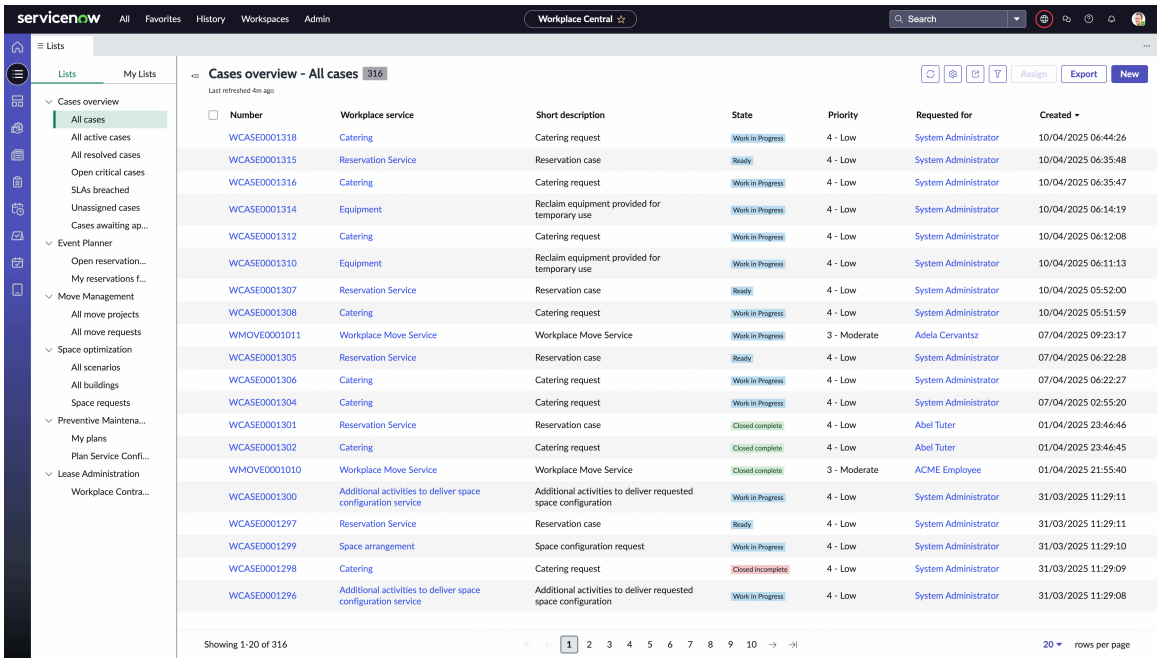
- Using the Event planner, monitor reservation created in your workplace are any time using the Event planner.
- Check the current day's planned reservation, canceled reservations and reservations that are yet to be approved.
- View reservation details and edit a reservation as a reservation planner.
- Open a reservation's details on the Employee central.

Lists module

The Lists module is a common dashboard that contains lists for the application tables and custom lists.



Lists tab

The Lists tab contains all the tables that are installed with your Workplace Service Delivery applications. You can only view the lists that your role has access to.

For more information about the lists, you can refer to the documentation of the relevant application.

- Workplace Analytics
- Scenario Planning
- Schedule Planning
- Space assistance
- Event Planner
- Move Management
- Case management
- Kiosk Indoor Mapping

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My lists tab

The My lists tab contains custom lists that you have created on Workplace Central. You can create a custom list by using an existing Workplace Central list, or by using a system table that you have access to. You can also organize your custom lists by selecting the **Reorder** option.

For more information about creating custom lists, see Creating custom lists on Workplace Central.

Workplace Analytics

The ServiceNow Workplace Analytics dashboard displays key metrics that enable you to optimize the use of workplace resources and maximize your return on investment.

Key features

- Data-driven insights, trends, and key performance indicators for the following applications:
  - Space Optimization
  - Lease Administration
  - Maintenance Management
  - Workplace Connectors
- Filters to narrow down the data selection.

Benefits

- Key metrics and trends in a single space
- Data range selection using filters
- Anticipate trends
- Prioritize resources by analyzing trends
- Reduced cost through resource optimization
- Customizable widgets to see relevant metrics

Accessing Workplace Analytics

To access Workplace Analytics, Workplace Central must be installed. For more information, see Install Workplace Central.

You can access Workplace Analytics by using one of the following methods:

- Navigate to **All** > **Workplace Central** > **Workplace Central**.
- Navigate to **Workspaces** > **Workplace Central**.

For more information about how to use Workplace Analytics, see Working with Workplace Analytics.

Space Planning

Create, understand, and manage core functions like space hierarchy, neighborhoods, and user assignments.

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Space Planning Overview

As a workplace manager, you can use the floor map to visualize where the employees are seated and how neighborhoods are located on the floors. You can manage seating, manage user moves, and keep your workspace data up to date. If the Workplace Space Management plugin is installed, you can use additional features like space metrics and summaries. You can also get AI generated insights if you have Workplace Advisor installed.

As a space planner, you can use the Space Planning module for the following:

- View floor plans, space types, and which users are assigned to each space
- View key stats (KPIs) like the number of spaces, total capacity, and number of assigned users
- Group spaces by neighborhoods or space types
- Select spaces from the map or based on a filter, and update their details
- Assign or unassign users, manage neighborhoods, and update user allocations

Accessing Space Planning

You must install the following plugins to use the Space Planning module:

- Workplace Central
- Workplace Core
- Workplace Space Management

  The Space Management plugin provides additional features like space metrics and summaries.

You can install the plugins from the ServiceNow Store. You can also visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information of all the released apps, see the ServiceNow Store release notes.

Important: You must configure your workplace locations to use Space Planning. For more information about configuring workplace locations, see Providing your workplace data.

To access Space Planning, navigate to **All** > **Workplace Central**, then select the **Space Planning** module in the workspace.

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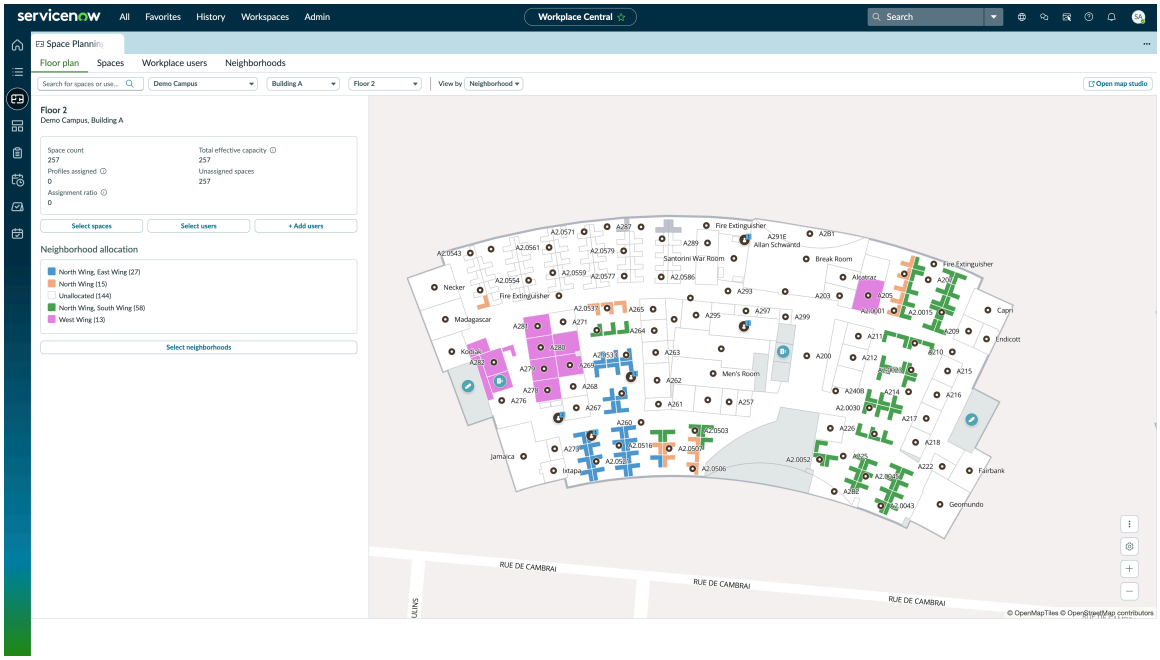

Space Optimization

As a space planner, you can use the Workplace Central to monitor all your scenarios and workplace-related information from a single page called Space Optimization.

Benefits of Space Optimization

As a space planner, you can do the following using the Space Optimization module:

- View the active number of all the scenarios created in your organization, the ones that were created by you, published scenarios and draft scenarios.
- View and work on space assistance requests raised in the organization.
- Monitor the total number of space assistance requests raised and view their current status at any time.
- Create a scenario for a building or multiple buildings.
- Open a scenario owned by you and make changes using the stack plan.
- View a scenario and see the space allocations in a stack plan or floor map view. You can review a scenario in a read-only mode and share your feedback on space allocations with the scenario owner or other stake holders.
- Create a single scenario or multiple scenarios. You can work on multiple scenarios at a time, and publish them so that your colleagues or stake holders can review. After finalizing, you can deploy the best one.
- View all buildings stack plans of your organization. You can also create a scenario directly from the building details page.
- Perform map-based administration with Workplace Indoor Mapping maps. View space allocations and assignments on a floor map. Change allocations on the map directly.
- View users assigned to a space, assign a user to a space or remove an assigned user.
- Change a space assignment from flexible to permanent or vice versa.
- Add, change, or remove a single allocation or multiple allocations at a time if you want to change their existing department or cost center.

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For more information about the Space Optimization homepage key features, refer to Space Optimization - Key features and actions.

Installing and accessing Space Optimization

You must install the following plugins to use the Space Optimization module:

- Workplace Central
- Workplace Space Management
- Workplace Case Management
- Workplace Indoor Mapping

To open the Space Optimization module, follow any of the following steps on Employee Center:

- Navigate to **Workspaces** > **Workplace Central** > **Space Optimization**.
- Navigate to **All** > **Workplace Central** > **Workplace Central** > **Space Optimization**

You can also view the scenarios created by you from **All**

View Space Optimization metrics

You can view Space Optimization metrics in the Workplace Analytics dashboard. For more information, see View Space Optimization metrics.

View Space Occupancy metrics

Ensure that you have installed the Workplace Connectors application. For more information Occupancy Dashboard metrics, see View Occupancy Dashboard.

Scenario Planning

Manage space allocations in your workplace in the most efficient way using the Space optimization scenario planning feature. Adjust your existing space allocations, floor arrangements, and employee seating plan by creating a scenario and deploying it.

Overview of Scenario Planning

The Workplace Central is like a central homepage where you can monitor all your workplace-related tasks. The Workplace Central provides you the Space optimization module that enables you to create scenarios using a stack plan and view the plan on the floor map. Using the Space optimization module, as a space planner you can perform several actions related to scenarios such as creating a scenario, monitoring the number of scenarios created and more. For more information about the Space optimization module, refer to Space Optimization.

Space Optimization enables you to perform scenario planning using a stack plan and a floor map. Scenario planning enables you to create multiple versions of a building with different space allocations until you finalize the best plan. You can share a scenario between multiple stake holders and deploy the best plan to the production.

Working with Scenario planning

To create a scenario using the space optimization feature, you must install the latest version of the following plugins:

- Workplace Central
- Workplace Space Management

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- Workplace Move Management
- Workplace Indoor Mapping

Install the plugins from the from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
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Using the Space optimization module you can create scenarios for a single building or multiple buildings. You can perform the following actions while working with a scenario:

- A scenario creates a copy of a building with its entire space allocation plan and displays in on a stack plan, according to floors. A stack plan enables you to view all the allocations made on different floors of a building with clear divisions and colors.
- Using the stack plan, visualize spaces and departments as bars and move them to different floors as required. The bars are color-coded and depending on the allocation, the numbers are displayed. You can view unallocated spaces on a floor. You can categorize the spaces based on their department or cost center. You can switch views depending on how you want to view the spaces.
- You can also create a copy of an existing scenario. You can create multiple scenarios of a building and compare the best plan with your stake holders. You can share these scenarios with other colleagues or stake holders by changing the ownership of the scenario and deploying it after finalizing one.
- Create a single scenario or multiple scenarios. You can work on multiple scenarios at a time, publish them so that your stake holders can review.
- Send a scenario for approval after you publish it. The application provides a default approval definition which is used to process approvals.
- You can view your approver and approval-related details in an Approver tab.
- You can deploy an approved scenario directly. In case the scenario is rejected, you can view the details of rejected and implement changes. You can send a scenario for approval multiple times till it is approved.
- Change space assignments on a floor, move a department or cost center from one floor to another, add or remove spaces, view the number of unallocated spaces, and more.
- Change the user assignment of a space, such add or remove a user.
- Vacate a floor easily by moving all the allocations to another floor with simple bar movement on the stack plan.
- Assign a space as permanent or flexible or remove the setting.
- You can also directly move spaces on a floor using the Floor map view. The Workplace Indoor Mapping floor map enables you to make allocations, assignment type, and user assignment-related actions.

> **Note:** Ensure that you have installed Indoor Mapping to visualize and reserve spaces using floor maps.

Schedule Planning

Manage space assignments to help employees head back to the office.

Schedule Planning overview

Schedule Planning provides a streamlined experience for project managers to assign and manage employee assignments based on project time frames.

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As a project manager, you can do the following:

- View a list of employees assigned to your project
- View a list of spaces allocated for your project
- Create a schedule plan for a specific period to map spaces to the employees
- Execute a schedule plan to assign spaces to the Workplace Profile of the users

Accessing Schedule Planning

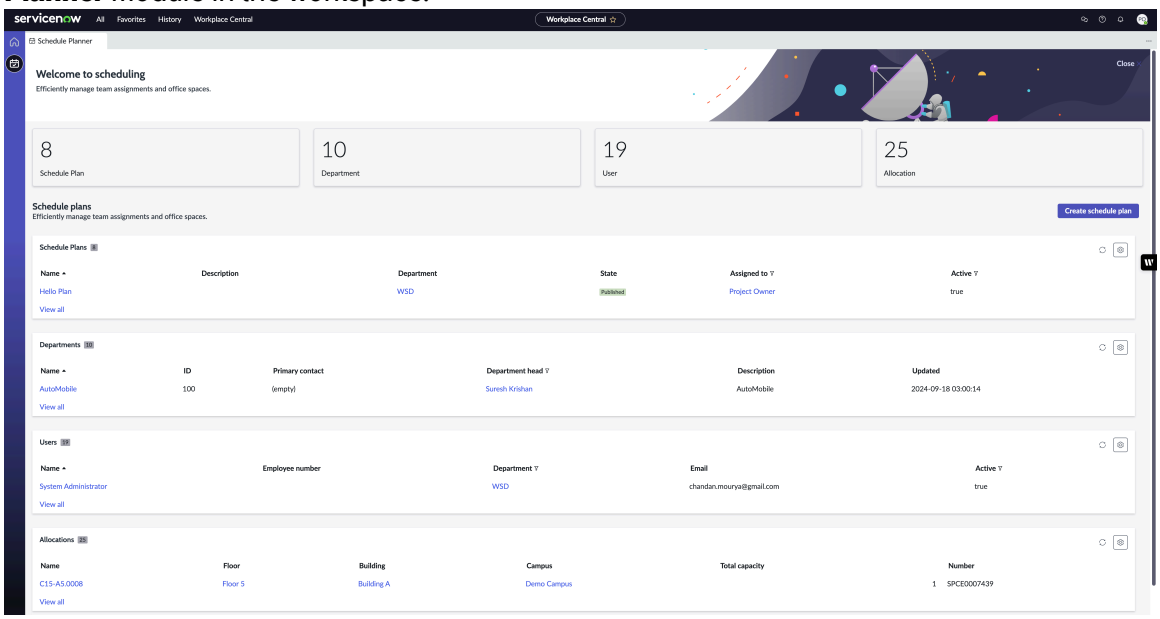
You must install the following plugins to use the Schedule Planner module:

- Workplace Central
- Workplace Space Management

You can install the plugins from the ServiceNow Store. You can also visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information of all the released apps, see the ServiceNow Store release notes.

Important: You must set a value for the *sn_wsd_core.ALLOCATION_TYPE* property to enable schedule planning.

To access the Schedule Planner, navigate to **All** > **Workplace Central**, then select the **Schedule Planner** module in the workspace.



As a project owner, you can view the created schedule plans, projects assigned to you, and the spaces and users assigned to the projects. You can create a schedule plan or edit existing schedule plans. For more information, see Working with Schedule Planning.

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Note: A project owner can create schedule plans for the projects that are assigned to them. Projects can be assigned to a user from the following fields:

- **Primary contact** field of the department
- **Manager** field of the cost center
- **Managed by group** or **Managed by** field of the workplace entity

Only one of the fields is considered for the project list based on the *sn_wsd_core.ALLOCATION_TYPE* property.

Schedule Plan states

A schedule plan can be in one of the following states:

- Draft: Project owner has created a new schedule plan but has not filled the details or started the workplace assignments.
- In Progress: Project owner has filled the schedule plan details and the workplace locations are being assigned to the users.
- Published: Schedule plan is created and the workplace locations are assigned to all the users.
- Complete: Schedule plan has reached the specified end date and the workplace location assignments are made inactive.
- Cancelled: Project owner has cancelled the schedule plan and the workplace location assignments are made inactive.

Note: The *Complete the lapsed schedule plan* job runs every day to check which schedule plans have reached the end date and move them to the **Complete** state.

Space assistance

As a space planner, assist your organization with space planning and their deployment. Work on space requests raised within the organization and implement the changes using the Space Optimization workspace.

The Workplace Central workspace enables you to manage the space requests submitted in the organization and deploy them by following a simple process. A space request is created as a workplace case in the application. You can view the workplace case using the Space Optimization workspace. As a space planner, you can perform the following actions on space request workplace cases:

- View the total number of workplace space requests created in the organization using the metrics.
- Work on any space request workplace case that is currently in progress at any time.
- View the space request details.
- Assign the space request to another assignment group or a user.
- Add comments and work notes in the workplace case. The comments and work notes are displayed in the request details to the user.
- View the space plan details of the request. Apply filters on the plan items using the filter pills.
- View the space plan on the floor map. To view the floor map, the floor map must be created using Workplace Indoor Mapping and Indoor Mapping component plugin.
- Check approval details of the request.
- View the respective space and user deployment plan and deploy it.

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Event Planner

Manage reservations requested in your organization in a simple event planner. As a Reservation planner, check the current day's planned reservations and view the reservation details. The schedule view also enables you to reschedule a reservation to another date and time by easily dragging and dropping it to another time.

You can also access the Event planner as a Reservation planner and a Reservation viewer. The planner provides you with a detailed view of all the reservations requested by employees and also the reservations requested by you for yourself or on-behalf of others. Open and view the Location Directory portal from the Event Planner home page.

You can check if there are any reservations that require extra services, reservations that are canceled and more. The Event planner also enables you to view the reservations in a scheduled view where you can track reservations made on any campus, its buildings, and any specific floor. The scheduled view displays reservations in colors based on their status. You can also schedule a reservation to a later time by easily dragging it across the time line. At any point, you can view the details of a reservation such as the exact details specified by the requester, the extra services raised by them, the cases and tasks created for those services, the invitees and more.

Important: Reservations created using a calendar provider can only be managed using the calendar provider.

Ensure that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

Using the Event planner schedule view, you can perform various actions on reservation. However, note the following:

- Open and view the Location directory portal from the Scheduled view. For more information, see Open and view Location directory from Event Planner.
- You can only manage reservations that are created using Workplace Core applications.
- You can manage single and occurrence reservations.
- You can manage a multi-location or a group reservation only by opening the reservation details and not with the schedule view.
- As a reservation planner, you can perform the following actions:
  - Drag a reservation to another date and time to reschedule.
  - Change the reservation timings,
  - Change the location of the reservation.
  - Cancel a reservation
  - **Note:** Cancelling a recurring reservation should only delete that particular occurrence and not the complete series. The complete recurring reservation can be cancelled from the portal.
  - Open a reservation and make advanced changes and also add services

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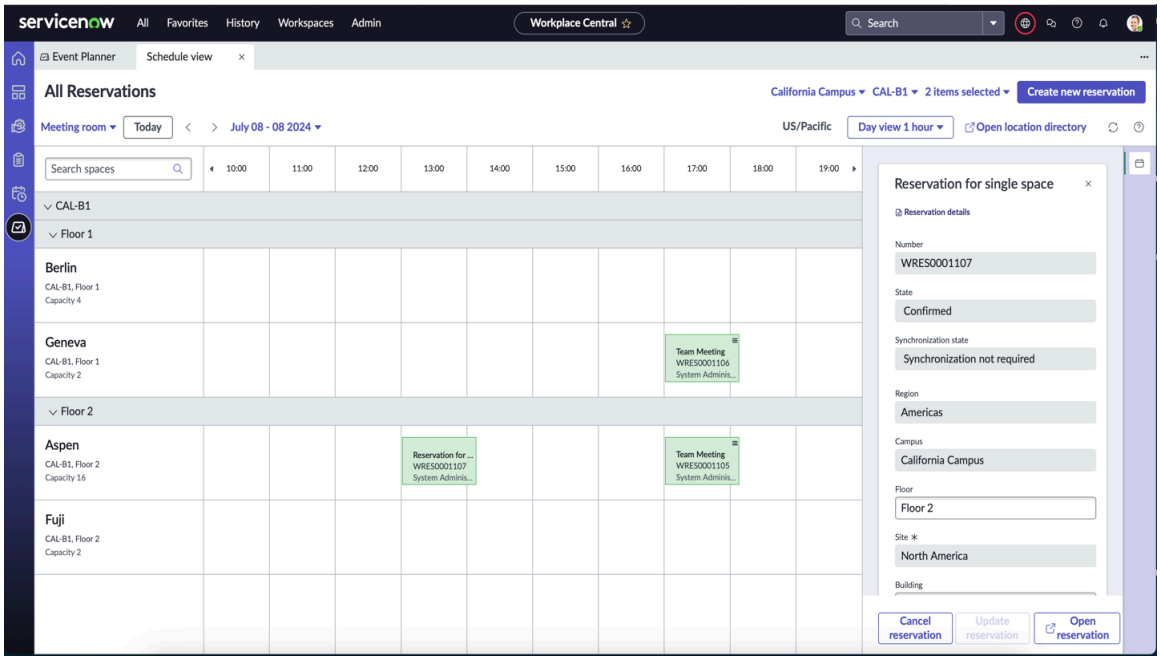

The Event planner also provides you with an option to create a reservation. The planner navigates you to the reservation portal from where you can make a reservation. As a Reservation planner, you can edit a reservation's number of attendees, the reservation purpose, and the cost center.

Note: In scheduled view, you cannot update a reservation after editing any custom field.

The Event planner workspace provides you with great options in tracking your reservations. For more information about the key features and its capabilities, refer to Workplace Central Event planner.

For more information about the Reservation planner role, refer to Components installed with Workplace Reservation Management

Move Management

Monitor multiple workplace moves at a time seamlessly using the Move Management workspace in the Workplace Central. Create move projects to track the progress of move requests.

The Move management workspace enables you to schedule moves as per their planned date. You can create a move project and group move requests using different filter conditions, such as, workplace location, campus, space type or more.

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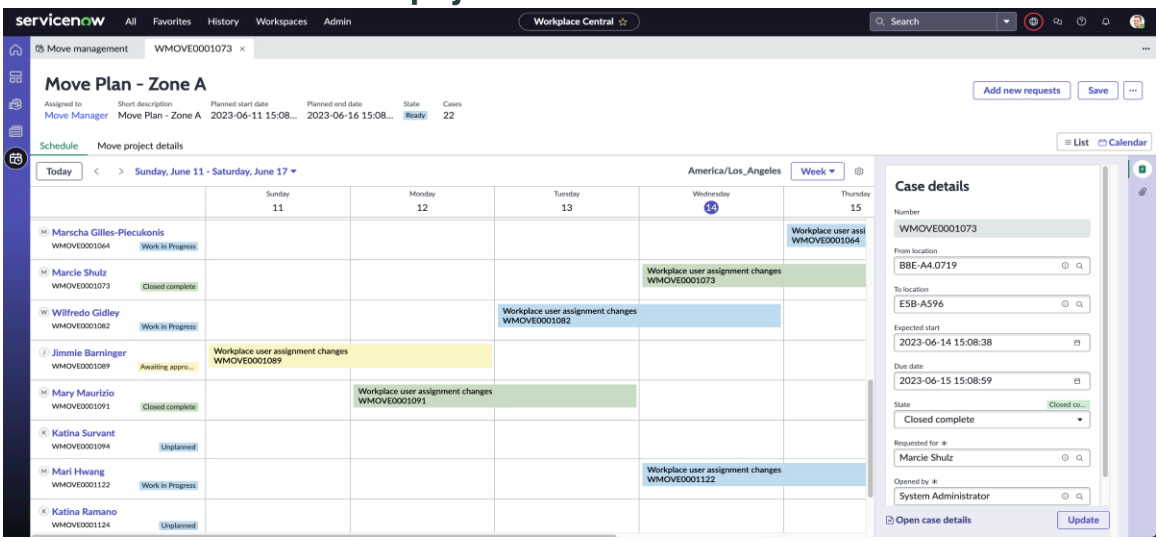
Move scheduler view of a move project



A move project enables you to work on requests in a schedule view, which is referred to as the Move scheduler view. The Move schedule view provides a visual representation of move requests in a schedule view similar to the schedule view of the Workplace Reservation Management Reservation portal. The requests are displayed with their current state, the date on which they're scheduled to move and further details. This way you can fulfill move requests as per the requested date in the Workplace Move Management. For more information about the Move scheduler, refer to Move project views, actions, and states.

Important: The Move management workspace enables you to only view and schedule move requests across different dates. To fulfill a move request, you must use the Workplace Move Management.

A Move project enables you to logically group move requests that match conditions specified by you. You can view all the move requests that matched the conditions under a single move project.

For example, when there are around 100 move requests currently requested by employees, it becomes a hard task to prioritize the fulfilling of move requests. In such cases, you can do the following by using the Move Management workspace in the Workplace Central:

1. Create a move project and specify condition filters to group move requests that match the condition. You can use conditions such as workplace location, space type, campus, requested move date, assignment group or more.
2. In the project, work on the requests that matched the condition.
3. View details of the move requests in the project in a calendar view. The request is displayed as a bar spread across the expected start and the due date.
4. View the number of days available for a request to be fulfilled, the start and end date of the request, the assigned user to the request and more.
5. Schedule the requests to another date by dragging across the calendar if necessary.

If you're working on multiple move projects, you can monitor various metrics related to move requests, such as, the number of active projects, move tasks, number of planned and unplanned requests using the Move Management workspace.

As a move manager, using the Workplace Central Move Management workspace, you can perform the following:

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- Create a move project to track multiple move requests at a time. Specify conditions such as building, assignment group, space type and more based on which the move requests must be grouped.
- Track the number of active move projects created that are created by you.
- View the number of move requests associated with the move projects.
- Track the number of workplace move tasks created to implement the move requests.
- View the number of planned and unplanned move requests currently created in the application. You can know which requests you can actively work on
- Visualize the current states of move requests. Track which requests are complete and which ones aren't. Based on the state, you can work on any requests that requires attention.
- You can also visualize each move project that you're working on. Each project is displayed based on the number of move cases assigned to the move project.

For more information about the Move management workspace, refer to Move management key features and actions.

Case management

As a workplace case manager, manage all your workplace cases from a single place using the Case management workspace in the Workplace Central workspace.

The Case management workspace helps you to handle thousands of workplace cases requested in the organization daily. Instead of using the Workplace Case Management application to monitor the cases, the workspace provides you a simple and efficient display of the same cases under various categories to help you handle them easily. Instead of verifying thousands of cases and reading the data specified in detail, the workspace analyzes them and presents the data accordingly. The case details are displayed in a manner where you can find the most the important information easily with a few selects and perform quick actions.

Important: You need the case manager [sn_wsd_case.manager] role to access the Case management module.

To know the key features of the Case management workspace and more, refer to Case Management - Key features, Actions & Case details.

You can analyze the incoming cases with the help of charts. Check the statuses of the cases and view them in detail. The workspace displays the cases that breached SLAs. The workspace displays cases such as normal workplace cases, maintenance cases, and move cases.

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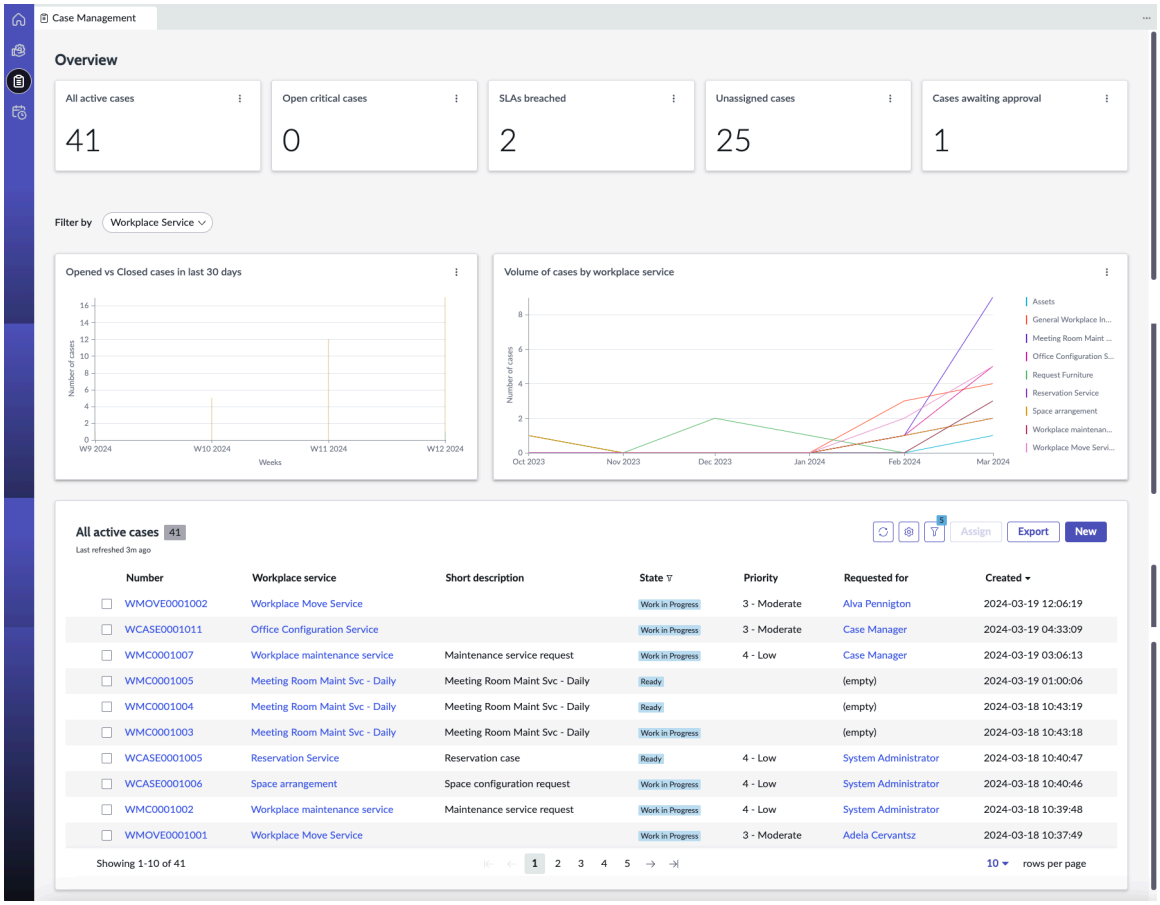

As a Case manager, the workspace enables you to perform the following actions:

- Monitor the number of active cases, critical cases, cases that have breached SLA, unassigned cases, and cases that are awaiting approval.
- View the graph of opened and closed cases on weekly bases.
- View the monthly volume of cases based on the workplace services.
- View the list of active cases in detail.
- Create a workplace service request directly instead of using the Workplace Service Portal.
- Assign a case to another agent within your assignment group.
- View case details such as the details of the employee who has requested the case, the location of the workplace on the floor map.
- Add notes or comments to the case.
- View attachments with the case, add checklist items, view knowledge base articles associated with the case, view templates and more.

As an admin or a case admin, you can cancel a case if it’s no longer required. Similarly, as a move admin, you can cancel a move case and as a maintenance admin you can cancel a maintenance case.

Kiosk Indoor Mapping

Enhance visitor and employee experiences by providing indoor maps in kiosks across your workplace.

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Kiosk Indoor Mapping overview

Kiosk Indoor Mapping provides a workspace experience to configure the maps for kiosks.

As a kiosk admin, you can do the following:

- Configure a map for a kiosk.
- Link a kiosk with an existing map.
- Customize elements to be used by the kiosk users.
  - Neighborhoods
  - Space bookings
  - Space assignments
  - Space filters
  - Wayfinding
  - Reservation and occupancy data
  - Ability to raise a case

As a kiosk user, you can do the following:

- View the map and your location on the map
- Search for a place on the map
- Filter spaces based on permanent seat assignment, occupancy data, and other criteria enabled by the admin
- Select a space and view the space details
- Get directions from the kiosk to a space
- Book and raise a workplace case

Accessing Kiosk Indoor Mapping

You must install the following plugins to use the Kiosk Indoor Mapping module.

- Workplace Central
- Workplace Services Kiosk
- Workplace Indoor Mapping

You can install the plugins from the ServiceNow Store. You can also visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information of all the released apps, see the ServiceNow Store release notes.

To access the Kiosk Indoor Mapping module, navigate to **All** > **Workplace Central**, then select the **Kiosk Indoor Mapping** module in the workspace.

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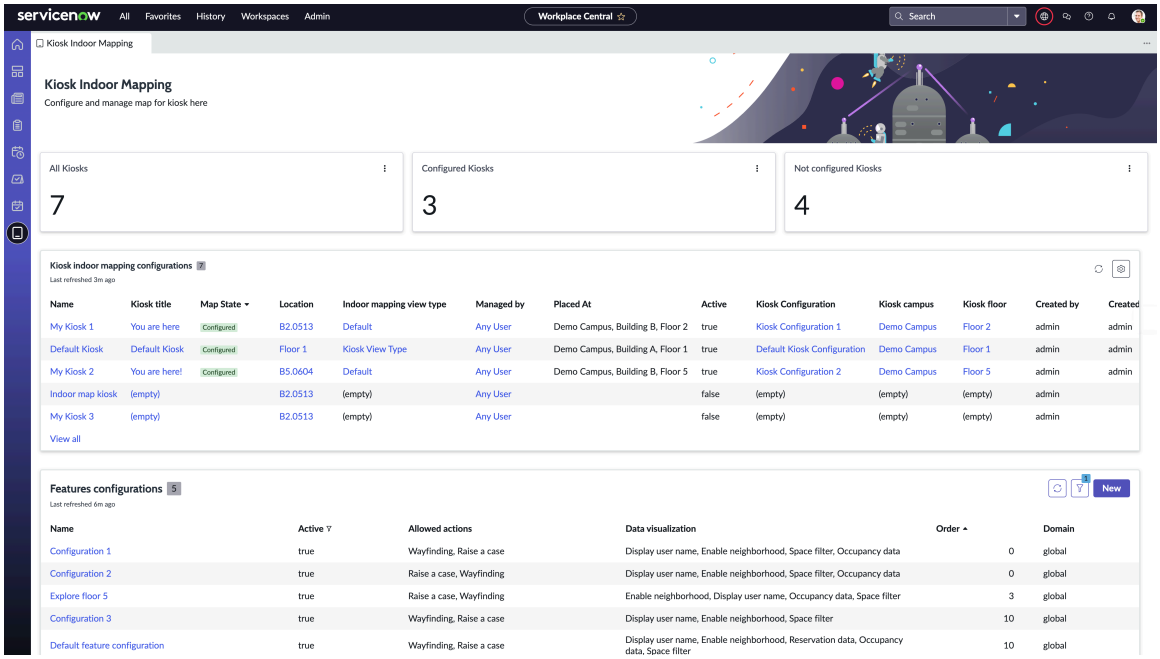

Configure Workplace Central

Install Workplace Central and related plugins.

Install Workplace Central. For more information on how to install, refer to Install Workplace Central.

You must also install the following plugins to start using the Workplace Central application:

- Workplace Stack Plan
- Workplace Move Management
- Workplace Space Management
- For Floor map view, the floor maps must be created using Workplace Indoor Mapping Map studio.

Install the plugins from the from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
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To customize a page in the Workplace Central application, refer to the knowledge base article: https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1639123.

Configure approvers of a scenario

Configure approvers for scenarios that are sent for approval. Edit the scenario approval definition to add or remove scenarios. By default, the workplace managers are configured to approve a scenario

Before you begin

You can either edit the default scenario approval definition, **Scenario Plan Approval**, that is provided the application or create a new approval definition.

To create a new approval definition, refer to Create an approval definition.

Note: To add an approver to the approval definition, the approver must be configured in the performer criteria. To do so, refer to Create a workplace performer criteria.

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Role required: sn_wsd_core.admin

Procedure

1. Navigate to **All** > **Workplace Core** > **Administration** > **Approval definitions**.
2. Select **Scenario Plan Approval** approval definition.
3. On the form, scroll down to the Workplace Approval Configurations related list.
4. Select **Scenario Plan Approver**.
5. On the form, add approvers in the **Approvers** field.
6. Click **Update**.

Result
The approver is configured to review the scenario.

Install Workplace Central

Install the Workplace Central application from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin
Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.

2. Verify that the following plugins are activated:
   - Workplace Space Management
   - Workplace Stack Plan
   - Workplace Move Management
   - Workplace Indoor Mapping for Floor map view.
   - Workplace Lease Administration
   - Document Management for Workplace Lease Administration

Use the following details when required:

- Name of the application: Workplace Central
- ID of the application: sn_wsd_central

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Central or ID (sn_wsd_central). If you cannot find the application, you may have to request it from the ServiceNow Store.
3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

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A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Central.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Use Workplace Central

Perform workplace-related activities using the Workplace Central application.

To customize a page in the Workplace Central application, refer to the knowledge base article: https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1639123.

Creating custom lists on Workplace Central

You can create custom lists using the Lists module on Workplace Central. You can create a custom list by using existing lists from Workplace Central, or by using a system table.

Create a custom list based on an existing list

Create a custom list based on an existing list on Workplace Central.

About this task

The following video explains how to create a custom list from an existing list:

https://player.vimeo.com/video/1121780434?h=a5a29102ef&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Note: You might require additional roles based on the lists that you want to access from Workplace Central.

Role required: sn_wsd_central.workspace_user

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
2. Select the **Lists** icon ( ).
3. Select the **My Lists** tab, then select **Add new list**.
   The New List pop-up appears with the **Start from existing** tab selected by default.
4. On the form, fill in the fields.

Start from existing

Field	Description
List	Existing Workplace Central list that you want to use for your custom list.

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Field	Description
	The system only displays lists that your role has access to. After you select a list, additional fields are displayed on the pop-up.
List Name	Display name for the custom list.
Select columns	Columns that are picked from the selected Workplace Central list and displayed on the custom list. This field is displayed after you select a list in the **List** field. Some columns might already be selected based on the selected list.

5. In the Add filters section, use the following options to filter and sort the records in your custom list.

Option	Description
Use existing filter	Use an existing filter that is available with the selected Workplace Central list.
Save filter	Save the current filter criteria. You can use saved filters for other custom lists. You can also grant permissions to other users to use the filter for their custom lists.
Refresh (Update count)	Update the number of records based on the current filter criteria.
Editor	Create condition sets for the filter criteria.
Sort by	Select fields that are to sort the results in the custom lists in ascending or descending or der.

6. Select **Create**.

Create a custom list based on a system table

Create a custom list on Workplace Central based on a system table.

About this task

The following video explains how to create a custom list based on a system table:

https://player.vimeo.com/video/1121786506?h=32368bb6a4&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Note: You might require additional roles based on the system table that you want to access for the custom list.

Role required: sn_wsd_central.workspace_user

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Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
2. Select the **Lists** icon ().
3. Select the **My Lists** tab, then select **Add new list**.
   The New List pop-up appears with the **Start from existing** tab selected by default.
4. Select the **Create your own** tab.
5. On the form, fill in the fields.

Create your own

Field	Description
List Name	Display name for the custom list.
Select Source	System table that you want to use for your custom list. The system only displays tables that your role has access to. After you select a list, additional fields are displayed on the pop-up.
Select columns	Columns that are picked from the selected system table and displayed on the custom list. This field is displayed after you select a system table in the **Select Source** field. Some columns might already be selected based on the selected list.

6. In the Add filters section, use the following options to filter and sort the records in your custom list.

Option	Description
Use existing filter	Use an existing filter that is available with the selected Workplace Central list.
Save filter	Save the current filter criteria. You can use saved filters for other custom lists. You can also grant permissions to other users to use the filter for their custom lists.
Refresh (Update count)	Update the number of records based on the current filter criteria.
Editor	Create condition sets for the filter criteria.
Sort by	Select fields that are to sort the results in the custom lists in ascending or descending or der.

7. Select **Create**.

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Working with Space Planning

Manage core functions like space hierarchy, neighborhoods, and user assignments.

Use Floor Plan

Use the floor plan to manage space and user assignments in your workplace.

Before you begin

Make sure that you have installed Workplace Core. For more information, see Install Workplace Core

For the Floor plan, make sure that you have configured the map in Indoor Mapping. For more information about configuring an indoor map, see Configure Indoor Mapping.

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The Floor Plan tab opens by default.
3. Select a campus, building, and floor to view the map.
4. **Optional:** View the KPIs on the details panel.
   The following KPIs are displayed based on your selection on the map.
   - `Space count`: Number of spaces on the floor or in the selection.
   - `Total effective capacity`: Capacity of the number of spaces multiplied by their capacity ratio.

     For example: If 20 spaces have a capacity ratio of 1.5, and 10 spaces have a capacity ratio of 1, the space count is 30 and total effective capacity is 40.
   - `Profiles assigned`: Number of workplace profiles assigned to the floor or selected spaces. If a user is assigned to multiple spaces, they are considered to have multiple profiles.

     For example, if a user is assigned to 2 spaces, and another user is assigned to 3 spaces, the number of assigned profiles is 5.
   - `Unassigned spaces`: Number of spaces that do not have any assignments.
   - `Assignment ratio`: Ratio of the assigned profiles to the total effective capacity.
5. **Optional:** Select a **View by** option to group spaces on the map.

   (Optional) The default view by option is set to **None**.

   Based on the view by option, the details panel displays information about Neighborhoods or Space Types. If the view by option is **None**, the details panel displays both Neighborhoods and Space Types.
6. Perform any of the following actions based on your requirement.

Action	Steps
Zoom in or out on the map	Use the zoom options ( ) on the map.

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Action	Steps
Change the map to a different floor and building	Select a building and floor from the **Building** and **Floor** list options.
Search for a user or space	**a.** Search for a user or a space in the search bar, then select one of the search results based on your preference. **b.** After selecting a user or a space, you can edit their assignments and allocations. For more information, see either of the fol lowing topics: ▪ Edit user assignments on the floor plan ▪ Edit space allocations on the floor plan
Select spaces	**a.** On the details panel, select **Select spaces**. The Select spaces pop-up opens. **b.** Add conditions to filter the spaces. (Optional) For example, `Department is Finance`. For more information about con ditions, see **c.** Select the spaces from the list. Alternatively, you can select multiple spaces on the map by holding the Shift key. You can also hold the Shift key and draw a circle to se lect spaces on the map. The details panel displays information about the selected spaces and their assigned users.
Select a neighborhood	**a.** From the View by list, select **Neighbor hoods**. **b.** On the details panel, select **Select neigh borhoods**. The Select neighborhood pop-up opens. **c.** Select a neighborhood from the list, then se lect **Confirm**. All spaces on the floor that are allocated to the neighborhood are selected.
Select Users	**a.** On the details panel, select **Select users**. The Select users pop-up opens. **b.** Add conditions to filter the users.

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Action	Steps
	(Optional) For example, `Workplace profile is Active`. For more information about conditions, see **c.** Select the users from the list. The details panel displays information about the selected users and their assigned spaces.
Edit space details	**a.** Select the spaces that you want to edit. **b.** On the details panel, select **View/edit details**. **c.** On the Spaces list, edit the details based on your requirement.
Display user assignments on the map	**a.** On the map, select the settings icon ( ). **b.** Turn on the **Assigned to** option to display user assignments on the map. This option is switched on by default. **c.** Select any of the following options based on your requirement: ▪ **Location assignments** ▪ **Neighborhood assignments** **d.** Select **Apply**.
View the map as defined in the Map Studio	**a.** On the map, select the settings icon ( ). **b.** Turn on the **Show base map** option, then select **Apply**. The map displays spaces as defined in the Map Studio.

Important:

If **Neighborhood** is selected as the group by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other group by option, assignments that have the **Location assignment** type are applicable.

What to do next

- Edit space allocations on the floor plan
- Edit user assignments on the floor plan

Edit user assignments on the floor plan

Use the floor plan to edit location or neighborhood assignments for the users.

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Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The Floor Plan tab opens by default.
3. Select a campus, building, and floor to view the map.
4. **Optional:** Select a **View by** option to group spaces on the map.

   (Optional) The default view by option is set to **None**.
5. Edit the user assignments based on your requirement.

Action	Steps
Assign a single user	**a.** Select the space that you want to assign the user to. If you don't select any space, the user is assigned to the floor selected on the map. **b.** On the details panel, select **Add users**. **c.** On the Add users pop-up, search for the user that you want to assign. **d.** Select the user from the list. **e.** Select either of the following assignment type for the user. ▪ **Location**: Creates a location assignment on the workplace profile. ▪ **Neighborhood**: Creates a neighborhood assignment on the workplace profile. **f.** Select **Confirm**.
Assign multiple users	**a.** Select the spaces that you want to assign the users to. If you don't select any space, the users are assigned to the floor selected on the map. **b.** On the details panel, select **Add users**. If you can select a single space, then from the Users section, select **Add**. **c.** On the Add users pop-up, select the **Select users by criteria** tab. **d.** Select either of the following assignment type for the users.

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Action	Steps
	▪ **Location**: Creates a location assignment on the workplace profiles. ▪ **Neighborhood**: Creates a neighborhood assignment on the workplace profiles. For the **Neighborhood** assignment, you must select the neighborhood you want to assign the users to. **e.** Add conditions to filter the users. (Optional) For example, `Workplace profile is Active`. For more information about conditions, see **f.** Select the users that you want to assign, then select **Confirm**.
Unassign users	**a.** Select spaces or users on the map. **b.** On the details panel, select **Unassign**. The Unassign users pop-up opens. **c.** Select the following options based on your requirement. ▪ **From the selected location**: Removes the selected assignment from the selected users. ▪ **From all location assignments**: Removes all location assignments from the select ed users. ▪ **From all neighborhood assignments**: Re moves all neighborhood assignments from the selected users. **d.** Select **Confirm**.

Edit space allocations on the floor plan

Use the floor plan to edit space or neighborhood allocations.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The Floor Plan tab opens by default.
3. Select a campus, building, and floor to view the map.
4. **Optional:** Select a **View by** option to group spaces on the map.

   (Optional) The default view by option is set to **None**.

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5. Select the spaces that you want to edit.

   a. On the details panel, select **Select spaces**.

      The Select spaces pop-up opens.

      Note: Alternatively, you can select multiple spaces on the map by holding the Shift key. You can also hold the Shift key and draw a circle to select spaces on the map.

   b. **Optional:** Add conditions to filter the spaces.

      (Optional) For example, `Department is Finance`. For more information about conditions, see Condition builder.

   c. Select the spaces from the list, then select **Select**.

6. Edit the space allocations based on your requirement.

Action	Steps
Edit space allocation	**a.** Select the spaces that you want to edit. **b.** On the details panel, select **Allocate**. **c.** From the Neighborhood list, select the neighborhoods that you want to allocate the spaces to. **d.** Select either of the following options based on your requirement: ▪ **Remove existing and replace**: Replaces the existing allocations with the new allo cation. ▪ **Add to existing**: Retains the existing allo cations and adds the new allocation. **e.** Select **Apply**.
Remove allocations	**a.** Select the spaces that you want to edit. **b.** On the details panel, select **Unallocate**. The Remove space allocations pop-up opens with the details of the neighbor hoods of the selected spaces. **c.** Select **Save**.

Manage neighborhoods using Space Planning

As a space planner, create and manage neighborhoods to assign groups of spaces for your organization's employees.

Before you begin

Role required: sn_wsd_core.workplace_manager

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Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The floor plan tab opens by default.
3. Select the **Neighborhoods** tab.
   The list of neighborhoods opens with details like their name, active status, and restricted status.
4. Manage the neighborhoods based on your requirement.

Action	Steps
Filter neighborhoods	You can filter, sort, and group the neighbor hoods in the list using filters. For more infor mation about filters, see Filters and bread
Create a neighborhood	**a.** On the Neighborhoods list, select **New**. **b.** On the Create New Neighborhood form, fill in the fields. For a description of the field values, see the Neighborhood Form table in Create a neigh borhood for workplace users. **c.** Select **Save**.
Edit neighborhood details	**a.** On the Neighborhoods list, select neighbor hoods based on your requirement, then se lect **Edit**. **b.** In the Edit items form, fill in the fields that you want to edit. **Important:** The value that you en ter in any field is applied to all the se lected neighborhoods. For example, if you select **Restricted**, all the neighbor hoods are set to restricted. **c.** Select **Update**.

Manage a single neighborhood

Edit the details of a neighborhood like the spaces, workplace profiles, space assignment tasks, and user assignment rules.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The floor plan tab opens by default.
3. Select the **Neighborhoods** tab.

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The list of neighborhoods opens with details like their name, active status, and restricted status.

4. Select the neighborhood that you want to edit.
   The neighborhood opens with the Overview tab. The overview displays KPIs for the neighborhood like the total capacity, assigned users, assigned spaces, and assignment ratio.
5. **Optional:** Edit the details of the neighborhood like the name, active status, restricted status, or short description.
6. Manage the neighborhood based on your requirement.

Action	Steps
Add a space	**a.** Select the **Spaces** tab. **b.** On the Spaces list, select **New**. **c.** On the Create New Space form, in the **Space** field, select the space that you want to add to the neighborhood. **d.** Select **Save**. **Important:** If you have Workplace Space Management installed, the Cre ate New Space form contains fields from the Spa c e form. For more information about the Space form, see Add a space using Workplace Space Management.
Remove a space	**a.** Select the **Spaces** tab. **b.** On the Spaces list, select the spaces that you want to remove, then select **Delete**. **c.** On the confirmation pop-up, select **Delete all**.
Export space details	**a.** Select the **Spaces** tab. **b.** On the Spaces list, select the spaces that you want to export. If you don't select any spaces, the system exports the details of all the spaces in your instance. **c.** Select **Export**. **d.** On the **Export** pop-up, select a **File Type** based on your preference. ▪ Excel ▪ CSV ▪ JSON ▪ PDF **e.** Select the Delivery Type based on your pref erence.

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Action	Steps
	▪ Download: Downloads the file to your local system. ▪ Email: Sends the file as an attachment to the specified email address. If you select email, you must enter the email address of the recipient. **f.** Select **Export**.
Assign a workplace profile	**a.** Select the **Workplace Profile Location Assignments** tab. **b.** On the Workplace Profile Location Assignments list, select **New**. **c.** On the form, fill in the fields. For a description of the field values, see Workplace Profile Location Assignment form.
Remove a workplace profile	**a.** Select the **Workplace Profile Location Assignments** tab. **b.** On the Workplace Profile Location Assignments list, select the profiles that you want to remove, then select **Delete**. **c.** On the confirmation pop-up, select **Delete all**.
Create a space assignment task	**a.** Select the **Space Assignment Tasks** tab. **b.** On the Space Assignment Tasks list, select **New**. **c.** On the Workplace Task form, fill in the fields. For a description of the field values, see Workplace Task form - Space Assignment task. **d.** Select **Save**. **Note:** Assigning spaces based on the task can take several minutes.
Create a user assignment rule	**a.** Select the **User assignment rules** tab. **b.** On the User assignment rules list, select **New**. **c.** On the **Neighborhood User Assignment Rule** form, fill in the fields. For a description of the field values, see Neighborhood User Assignment Rule form.

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Action	Steps
	d. Select **Save**. **e.** After the rule is created, select **Execute user assignments** on the neighborhood page. After executing the user assignments, the `Assign Users to Neighborhood` scheduled job assigns workplace profiles to the neighborhood.

Manage spaces using Space Planning

As a space planner, manage the spaces, their assignments, and their allocations using the Space Planning module.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The floor plan tab opens by default.
3. Select the **Spaces** tab.
   The list of spaces opens with details like their name, location, and allocation.
4. Manage the spaces based on your requirement.

Action	Steps
Create a space	**a.** On the Spaces list, select **New**. **b.** On the Create New Space form, fill in the fields based on your requirement. **c.** Select **Save**. **Important:** If you have Workplace Space Management installed, the `Create New Space` form contains fields from the `Space` form. For more information about the Space form, see Add a space using Workplace Space Management.
Edit spaces	**a.** On the Spaces list, select the spaces that you want to edit. **b.** Select **Edit**. **c.** Edit the details based on your requirement.

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Action	Steps
	Important: The value that you enter in any field is applied to all the select ed spaces. For example, if you select **Is reservable**, all the spaces made reservable. **d.** Select **Update**.
Edit space allocations	**a.** On the Spaces list, select the spaces that you want to edit. **b.** Select **Edit allocation**. The Edit space allocation pop-up opens with the `Allocation` tab selected by de fault. **c.** Select the neighborhood that you want to assign the spaces to. **d.** Select either of the following options based on your requirement: ▪ **Remove existing and replace**: Replaces the existing allocations with the new allo cation. ▪ **Add to existing**: Retains the existing allo cations and adds the new allocation. **e.** Select **Apply**.
Remove space allocations	**a.** On the Spaces list, select the spaces that you want to edit. **b.** Select the context menu next to **Edit alloca tion**, then select **Remove allocation**. **c.** On the Remove space allocation pop-up, re view the current allocation details, then se lect **Save**.
Export space details	**a.** On the Spaces list, select the spaces that you want to export. If you don't select any spaces, the system exports the details of all the spaces in your instance. **b.** Select **Export**. **c.** On the **Export** pop-up, select a **File Type** based on your preference. ▪ Excel ▪ CSV ▪ JSON ▪ PDF

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Action	Steps
	d. Select the Delivery Type based on your pref erence. ▪ Download: Downloads the file to your lo cal system. ▪ Email: Sends the file as an attachment to the specified email address. If you select email, you must enter the email address of the recipient. **e.** Select **Export**.

Manage workplace profiles using Space Planning

Manage the workplace user profiles, their details, and their assignments using the Space Planning module.

Before you begin

Role required: sn_wsd_core.workplace_manager

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the **Space Planning** module.
   The floor plan tab opens by default.
3. Select the **Workplace users** tab.
   The list of user profiles opens with details like their name, primary location, and allocation.
4. Manage the users based on your requirement.

Action	Steps
Create a workplace profile	**a.** On the Workplace users list, select **New**. **b.** On the User Workplace Profile form, fill in the fields. For a description of the field values, see User Workplace Profile form. **c.** Select **Save**.
Edit user assignments	**a.** Select the users who you want to edit the assignments for. **b.** Select **Assign**. The Assign users pop-up opens. **c.** Select either of the following assignment type for the users. ▪ **Location**: Creates a location assignment on the workplace profiles. ▪ **Neighborhood**: Creates a neighborhood assignment on the workplace profiles.

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Action	Steps
	d. Enter the details of the location that the users must be assigned to. You must enter at least the campus and building to assign the user. For the **Neighborhood** assignment, you must select the neighborhood you want to assign the users to.
Remove user assignments	**a.** Select the users who you want to edit. **b.** Select the context menu next to **Assign**, then select **Unassign**. **c.** Select the following options based on your requirement. ▪ **From their primary location**: Removes the primary location assignment from the selected users. ▪ **From all location assignments**: Removes all location assignments from the select ed users. ▪ **From all neighborhood assignments**: Re moves all neighborhood assignments from the selected users. **d.** Select **Confirm**.
Edit user details	**a.** On the Workplace users list, select the users who you want to edit. **b.** Select **Edit**. **c.** Edit the details based on your requirement. **Important:** The value that you enter in any field is applied to all the select ed users. For example, if you change the **Workplace entity**, all the users are allocated to the selected entity. **d.** Select **Update**.
Export user profile details	**a.** On the Workplace users list, select the users who you want to export. If you don't select any users, the system ex ports the details of all the workplace pro files in your instance. **b.** Select **Export**. **c.** On the **Export** pop-up, select a **File Type** based on your preference. ▪ Excel ▪ CSV

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Action	Steps
	▪ JSON ▪ PDF **d.** Select the Delivery Type based on your pref erence. ▪ **Download**: Downloads the file to your lo cal system. ▪ **Email**: Sends the file as an attachment to the specified email address. If you select email, you must enter the email address of the recipient. **e.** Select **Export**.

Working with Space Optimization

Perform space optimization-related actions such as creating scenarios, approving scenarios and more.

Note: To access the Space Optimization module in Workplace Central, you must have the sn_wsd_spcmgmt.space_planner role or the sn_wsd_spcmgmt.scenario_reader role; sn_wsd_spcmgmt.scenario_reader is a read-only role.

Create a scenario

Create a scenario with a building. Add, update, or remove space allocations before publishing and deploying a scenario. Manage and update your scenarios using the Stack plan and Floor map component tabs.

Before you begin

Ensure that the following plugins are installed:

- Indoor Mapping (for map-based administration)
- Workplace Core
- Workplace Central
- Workplace Service Delivery components
- Workplace Case Management
- Workplace Space Management

Important: You can view spaces based on their workplace entities only for a building. You can't create or view a scenario based on workplace entities.

Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read only; to view a scenario)

Procedure

1. Navigate to one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center. Navigate to **Workspaces** > **Workplace Central**.

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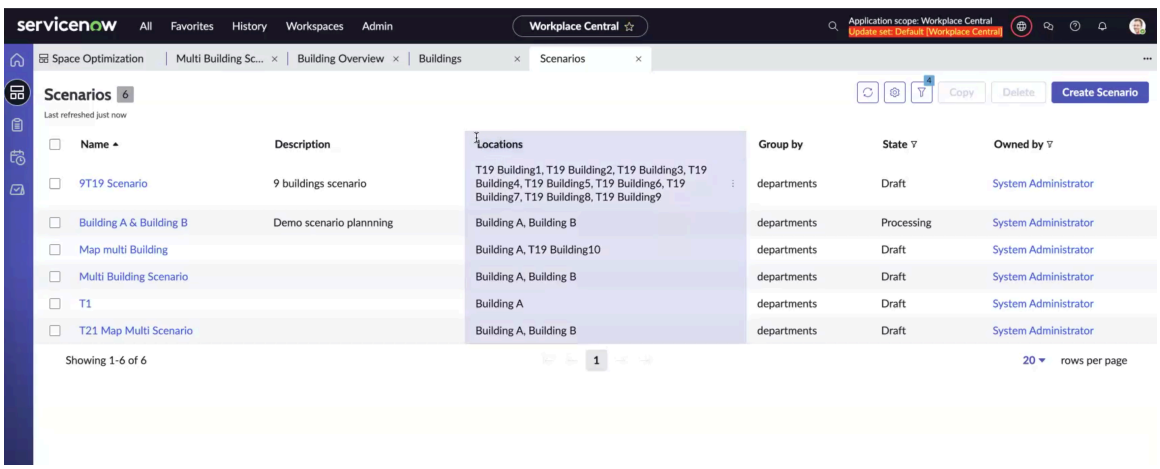
2. Select the **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. Create a scenario by selecting **Create a scenario** from either of the following options.

Path	Action
From the Space Optimization tab	Select **Create scenario**.
From a scenarios list section	Select **Create scenario**.
From the Buildings section	**a.** Select a building. **b.** On the building details tab, select **Create scenario**.

4. On the Scenario details form, fill in the fields.
   For a description of the field values, see Scenario details form.
5. Select **Save scenario**.
6. **Optional:** Select the Refresh icon ( ) to check if your scenario has moved to the **Draft** state.

Result

The new scenario is created in the **Processing** state and takes some time to move to the **Draft** state. You can't open a scenario that is in the Processing state.



For more information about scenario states, refer to Scenario and Building - Views, states, settings, and key features.

After a scenario moves to the **Draft** state, you can open the scenario and select the view options for the scenario.

- **Edit Scenario**: You can only edit a scenario using this option. This option is available only when you select a scenario from the Space Optimization page. It isn't available when you select a building from the Space Optimization page.
- **View Scenario**: View scenario details (unassigned spaces, allocated spaces, and user assignment details) for a selected building, floor, or bar.

What to do next

To create a copy of an existing scenario, see Create a copy of an existing scenario.

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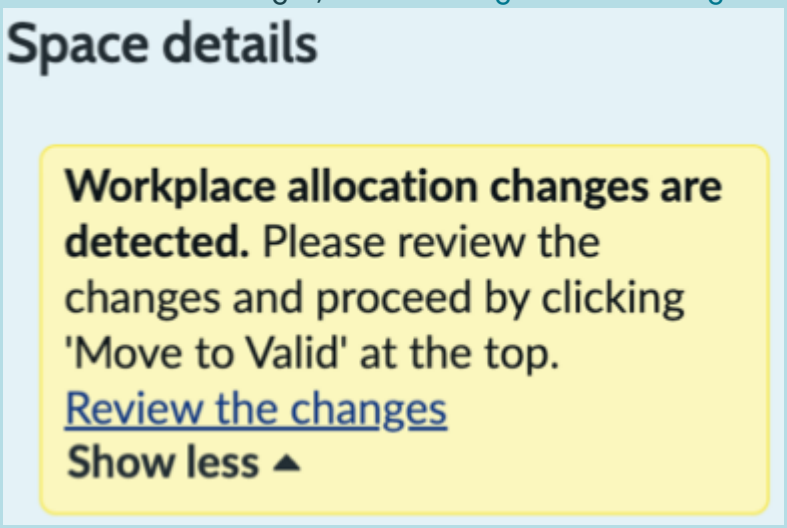
View or edit the scenario by using the stack plan or the floor map. For more information, see Viewing or editing a scenario.

Viewing or editing a scenario

You can view the details like the floor details and space KPIs. You can edit a scenario to allocate spaces to projects and neighborhoods, assign spaces to users, or edit space assignments.

Important: If allocation changes in your instance impact the scenario, the system displays a warning on the Space Details panel. You must review the changes, edit the scenario accordingly, then select **Move to valid** before continuing. For more information about allocation changes, see Reviewing allocation changes.



Viewing a scenario

While viewing a scenario, you can select a **View by** option to group spaces on the stack plan or the floor map. If you select Workplace Entity, you can also select the entity level that you want to use to view the scenario. The scenario displays all entity levels by default.

You can view a scenario on the stack plan, or on the floor map. For more information about stack plans and floor maps, see Scenario and Building - Views, states, settings, and key features.

The Space details panel displays information about the spaces and profile assignments for a scenario. When you select a building, floor, or bar on the stack plan, the information is updated based on your selection.

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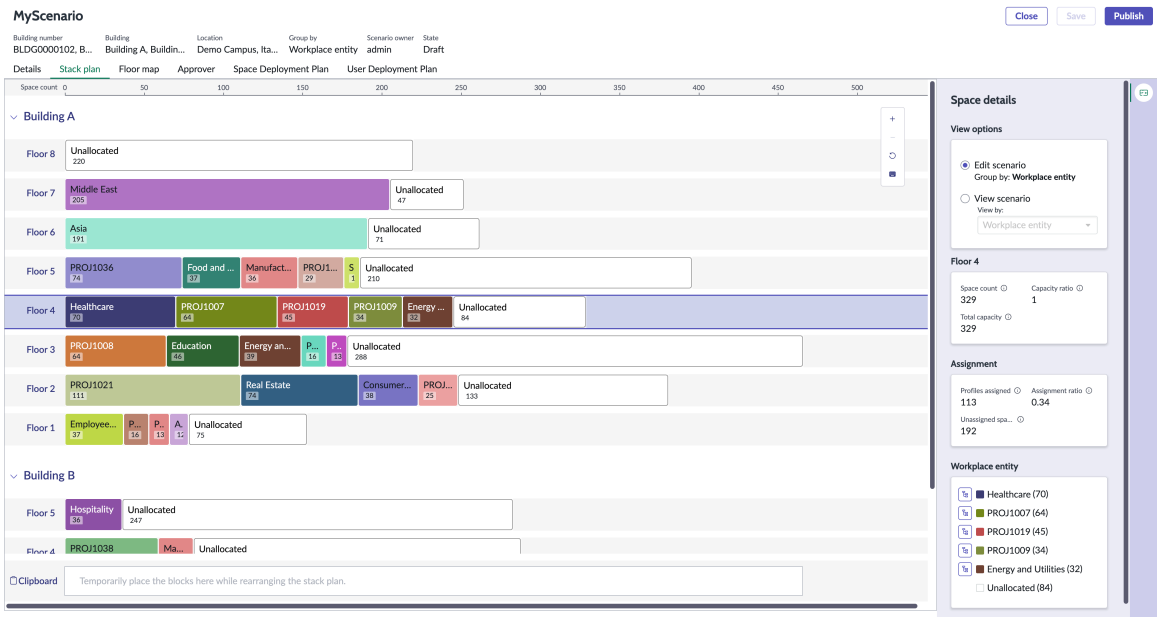
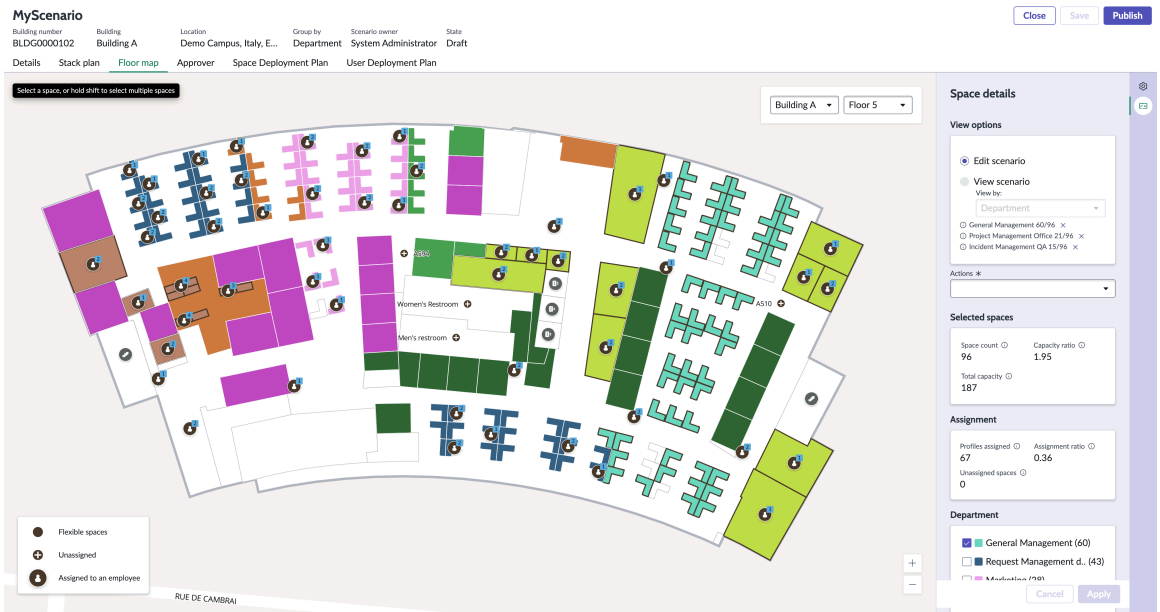


When you select spaces on the floor map, the Space details panel displays information based on your selection.



The information on the Space details panel is displayed in cards. You can also view the cards while editing the scenario.

- The first card displays the space count, the total capacity, and the ratio of the capacity to the spaces.

  The name of the card changes based on your selection in the stack plan or floor map.

- The **Assignment** card displays the number of profiles assigned to the selected spaces, the number of unassigned spaces, and the assignment ratio of users to spaces.
- The legend card displays the allocations on the selected area of the stack plan or floor map.

  The name of the card changes based on your selection in the stack plan or floor map.

  If the view by option is Workplace Entity, you can view the hierarchy by selecting the tree icon () on the legend card.

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Editing a scenario

While editing a scenario, the **Group by** option is used to allocate spaces based on the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] system property.

For example, if the **Group by** option is **Neighborhood**, then neighborhoods are available for you to edit in the Stack plan tab of the scenario.

You can edit a scenario by using the stack plan, or by using the floor map. For more information about stack plans and floor maps, see Scenario and Building - Views, states, settings, and key features.

- If **Neighborhood** is selected as the group by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other group by option, assignments that have the **Location assignment** type are applicable.
- Editing a scenario based on workplace entities is supported from Workplace Space Management version 1.15.0. For earlier versions, you can view spaces based on their workplace entities for a building. For more information, see Edit or view a building's spaces based on workplace entities
- If you select Workplace Entity as the group by option, the bars of the stack plan are displayed based on the lowest node in the hierarchy. For example, if the hierarchy for the spaces is `Corporate\Europe\Information Technology\IT Support`, the bars are displayed for `IT Support`. While editing a scenario, you can select the entity level that you want to use for the stack plan.

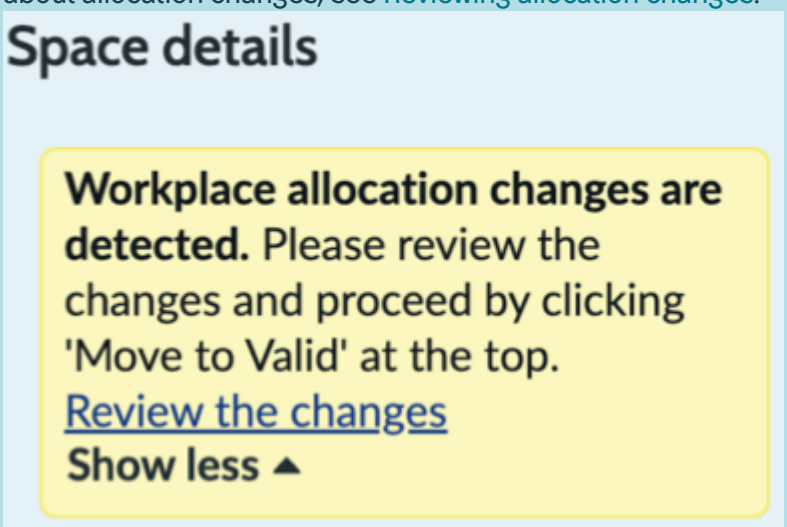
For more information about editing a scenario, see either of the following topics.

Edit a scenario using the stack plan

Edit a scenario using the stack plan to allocate spaces to departments, cost centers, workplace entities, or neighborhoods.

Before you begin
Ensure that you have created a scenario, and it is in the Draft state. For more information, see Create a scenario.

Important: If allocation changes in your instance impact the scenario, the system displays a warning on the Space Details panel. You must review the changes, edit the scenario accordingly, then select **Move to valid** before continuing. For more information about allocation changes, see Reviewing allocation changes.



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Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read only; to view a scenario)

Procedure

1. Navigate to one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center by navigating to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select All scenarios, then select the scenario that you want to edit.
   By default, the scenario opens in the **Stack plan** tab.
3. On the Space details pane, on the View options card, select **Edit scenario**.
   The **Group by** option is automatically filled based on the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] system property.
4. Select the Accordion panel icon ( ) for the building that you want to edit.
   You can expand an accordion to display the floors of a building. If your scenario contains multiple buildings, the accordion of the last building is expanded by default.
   - When you select a building to see the floors, the borders of the selected building are highlighted.
   - When you select a floor on the Stack plan to view the spaces or allocations, the borders of the selected floor are highlighted.
   - When you select a bar or space to view the number of allocated spaces, the borders of the selected bar or space are highlighted.
5. Edit the stack plan based on your requirement.

Action	Steps
Zoom in or out on the stack plan	Use the zoom options ( ) on the stack plan.
Resize a bar	**a.** Select the bar that you want to resize. **b.** On the map legend card, select **Resize**. **c.** In the Space Count field, enter the number of spaces that you want to allocate to the bar. **d.** In the **Allocate added spaces from** or **Allocate remaining space to** field, select a parent entity or unallocated spaces. The spaces are allocated from or added to the selected entity. This step is applicable if the Group by option is Workplace Entity. **e.** Select **Apply**, then save the scenario.
Move a bar to a different floor	**a.** Select the bar that you want to move. **b.** On the map legend card, select **Move**.

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Action	Steps
	c. In the **Assign to building** field, select the building that you want to move the bar to. ▪ You can only select buildings that are added to the scenario based on the space selection criteria. ▪ You can also move the bar temporarily to the Clipboard. **d.** In the **Assign to floor** field, select the floor that you want to move the bar to. This field can't be edited if **Assign to building** value is **Clipboard**. **e.** In the **Space allocation** field, select a parent entity or unallocated space. The spaces are allocated from the selected entity. This field is applicable if the Group by option is Workplace Entity. **f.** Select **Apply**, then save the scenario.
Drag a bar to a different floor	**a.** Drag the bar to the floor that you want to move it to. **b.** On the space selection pop-up, select unallocated spaces or a parent entity. This step is applicable if the Group by option is Workplace Entity.

Edit a scenario using the floor map

Edit a scenario using the floor map to add or remove allocations, or to assign users to spaces in your organization.

Before you begin

Make sure that you have created a scenario, and it is in the Draft state. For more information, see Create a scenario.

Make sure that you have selected Indoor Mapping as your map provider to view maps.

- For more information about selecting a map provider, see Customize the map properties.
- For more information about indoor mapping, see Indoor Mapping.

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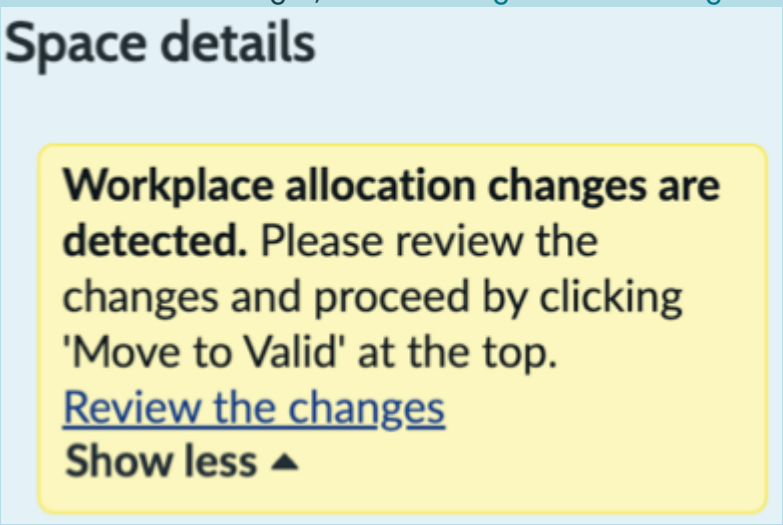
Important: If allocation changes in your instance impact the scenario, the system displays a warning on the Space Details panel. You must review the changes, edit the scenario accordingly, then select **Move to valid** before continuing. For more information about allocation changes, see Reviewing allocation changes.



Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read only; to view a scenario)

Procedure

1. Navigate to one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. From the All scenarios list, select the scenario that you want to edit.
   By default, the scenario opens in the **Stack plan** tab.
3. Select the **Floor map** tab.
4. On the Space details pane, on the View options card, select **Edit scenario**.
   The **Group by** option is automatically filled based on the Allocation type [*sn_wsd_core.ALLOCATION_TYPE*] system property.
5. Edit the scenario by using the floor map.

Action	Description
Zoom in or out on the map	Use the zoom options ( ) on the map.
Change the map to a different floor and building	Select a building and floor from the **Building** and **Floor** list options.
Share a floor	**a.** Select a floor on the map. Make sure that no spaces are selected. **b.** On the Space details pane, select the copy link ( ) icon.

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Action	Description
	A link to the floor is copied and can be shared with other space planners. Make sure that the space planner receiving the link can view or edit the scenario. **Note:** ○ Sharing a floor option is not available for scenarios that are in the `Draft` state. ○ You can only share floors from sce nario planning.
Select spaces based on a filter query	**a.** On the Space details panel, select the filter icon ( ). **b.** On the Filter spaces pop-up, add condi tions to select the spaces based on your re quirement. For example, `Space type is Room`. For more information about conditions, see **c.** Select **Apply**. Spaces on the map are selected based on the conditions that you added. **Note:** You can select spaces only while editing a scenario.
View the details of a space	Select one or more spaces on the map. You can select multiple spaces by holding the Shift key. You can also hold the Shift key and draw a circle to select spaces on the map. The details of the selected spaces are dis played on the Space details panel section. **Note:** You can select spaces only while editing a scenario.
Edit the allocation of a space	**a.** Select the spaces that you want to edit. You can select multiple spaces by holding the Shift key. You can also hold the Shift key and draw a circle to select spaces on the map. **b.** On the Space details panel, from the **Ac tions** drop-down list, select **Allocation**.

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Action	Description
	c. In the **Allocation** field, select any one of the following options: ▪ **Change allocation**: Select this option to change the allocation. ▪ **Add allocation**: Select this option to add an allocation. ▪ **Remove allocation**: Select this option to remove allocation. **d.** In the **Allocation type** field, select the allo cation that you want to make. **Note:** This field appears only if you select **Change allocation** or **Add allo cation**. The name of the field depends on the **Group by** field of the scenario. **e.** Select **Apply**, then save the scenario. **Note:** For Workplace Entities, if you add a parent and child entity as alloca tions, only the child entity is displayed on the map legend.
Edit the assignment type of a space	**a.** Select the spaces for which you want to change the assignment. You can select multiple spaces by holding the Shift key. You can also hold the Shift key and draw a circle to select spaces on the map. **b.** On the Space details panel, from the **Ac tions** drop-down list, select **Assignment type**. **c.** In the **Assignment type** field, select the type of assignment that you want to make. **d.** Select **Apply**, then save the scenario.
Assign a user to a space	**a.** Select the space that you want to edit. You can select only a single space to as sign a user. **b.** On the Space details panel, from the **Ac tions** drop-down list, select **User assign ment**. **c.** In the **User assignment** field, select the user that you want to assign to the space.

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Action	Description
	You can also select multiple users. **d.** Select **Apply**, then save the scenario.
Remove a user assigned to a space	**a.** Select the space that you want to edit. You can select only a single space to re move a user. **b.** On the Space details panel, on the **Assign ment** card, remove a user by selecting the remove assignment option.
Edit the display of user assignment and as signment type on the map	**a.** On the Space details panel, select the Map settings option. **b.** Based on what changes you want to make, enable, or disable any of the following op tions: ▪ **Assigned to**: Option to display the users assigned to a space. ▪ **Assignment type**: Option to display the type of assignment, that is, flexible or per manent.
View the map as defined in the Map Studio	**a.** On the Space details panel, select the Map settings option. **b.** Select **Show base map**. The map displays spaces as defined in the Map Studio.
Change the opacity of colored spaces	You can change the opacity of the spaces that are colored based on the group by or view by options. Changing the opacity is help ful if some elements on the map are hidden due to the color. **a.** On the Space details panel, select the Map settings option. **b.** In the **Opacity** field, enter the percentage value that you want for the highlighted spaces. **c.** Select **Apply**. The specified opacity value is set for the col ored spaces.

Important:

If **Neighborhood** is selected as the group by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other group by option, assignments that have the **Location assignment** type are applicable.

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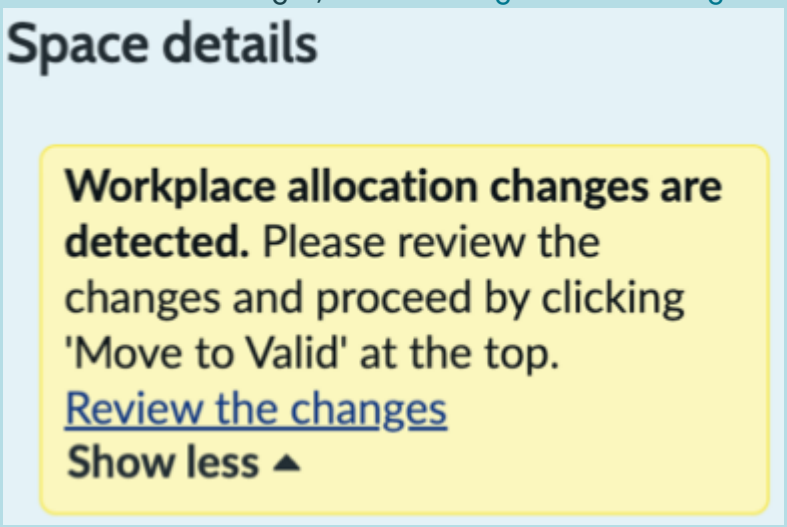
Edit user assignments of a neighborhood

Add a user to a neighborhood or edit the existing user assignments of a neighborhood in a building.

Before you begin

Make sure that you have created a scenario that is based on neighborhoods. For more information about creating neighborhoods and scenarios, see the following topics.

Important: If allocation changes in your instance impact the scenario, the system displays a warning on the Space Details panel. You must review the changes, edit the scenario accordingly, then select **Move to valid** before continuing. For more information about allocation changes, see Reviewing allocation changes.



- Managing Neighborhoods
- Create a scenario.

Important: You can add a user assignment or edit a user assignment of a neighborhood only in a building view.

Role required: sn_wsd_spcmgmt.space_planner

About this task

You can add or remove user assignments of a neighborhood in a building or a scenario. A workplace user can only have one location in a neighborhood. If a user is assigned multiple locations in the same neighborhood, the latest added location is set as active and others are deleted.

Note: On a building, you can only make user assignment-related changes only for a neighborhood that is already created. You can't add a new neighborhood.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.

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2. Select the **Space Optimization** icon ().
   The Space optimization dashboard opens.
3. In the All Buildings section, select the building that you want to modify the neighborhood user assignments for.
   Select **View all** to view a list of buildings.
   The stack plan of the building opens.
4. **Optional:** View the neighborhoods on each floor of the building.

   a. Select the Stack plan settings icon () to open the settings.

   b. In the **View by** field, select **Neighborhood**.
   The stack plan displays the neighborhoods in the building.

5. Edit the user assignments of a neighborhood in the stack plan.

   a. Select the neighborhood on the floor that you want to edit the user assignments on.

   b. On the Space details panel, in the Assignment section, select **Edit user assignments**.
   A page opens displaying the list of users assigned to the neighborhood.

   c. **Optional:** Use the filter, sort, or refresh options to modify the list.

   d. Add or remove users from the neighborhood.

Choice	Steps
Add users to the neighborhood	**a.** Select **Add**. **b.** In the Add user profile window, select the users whom you want to add. Use the filter option to filter the users list. You can add up to 1000 users to the neigh borhood. **c.** Select **Add**. The users are added to the neighborhood. A new Workplace Profile Location Assignment is added to the user's workplace profile with the neighborhood assignment. The **Source** field of the user assignment is set as manual.
Remove users from the neighborhood	**a.** Select the users who you want to remove from the neighborhood. **b.** Select **Remove**. **c.** On the deletion confirmation window, se lect **Delete All**. The users are removed from the neighbor hood. The Workplace Profile Location Assign

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Choice	Steps
	ment is removed from the user's workplace profile with the neighborhood assignment.

Neighborhood assignments are applicable if **Neighborhood** is selected as the group by or view by option in a scenario or building overview. Location assignments are applicable for all other options.

Review a scenario

Review a scenario created by your colleague on a building in a read-only mode.

Before you begin

Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read-only; to view a scenario)

About this task

You can review a scenario created by your colleague from the Space Optimization module and share your feedback with them before they deploy.

Important:

- To review a scenario, the scenario must be published and in the Ready state.
- You cannot edit a scenario, you can only view the scenario in a read-only mode. To edit a scenario, you must be assigned as the owner of that scenario.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select the **Space Optimization** icon ().
   The Space optimization dashboard opens.
3. In the Scenarios metrics tiles, select the **Published scenarios** tile.
   A list of published scenarios appears in a separate tab.
4. **Optional:** In the Scenarios list section, scroll down the list and click **View all**.
5. Select the scenario that you want to view.
   Use filters on the list to find the scenario that you're looking for.
   After selection, the scenario is opened on a stack plan.
6. On the stack plan, point to or select a bar to view more details.
   If you select a bar, you can view the details related to the bar on the right panel. For more information about the stack plan view features, refer to Scenario and Building - Views, states, settings, and key features.
7. **Optional:** View the scenario plan on a floor directly by selecting the **Floor map view** tab.

   Note: You can view the scenario plan on a floor map only if the floor map is configured using the Workplace Indoor Mapping Map studio.

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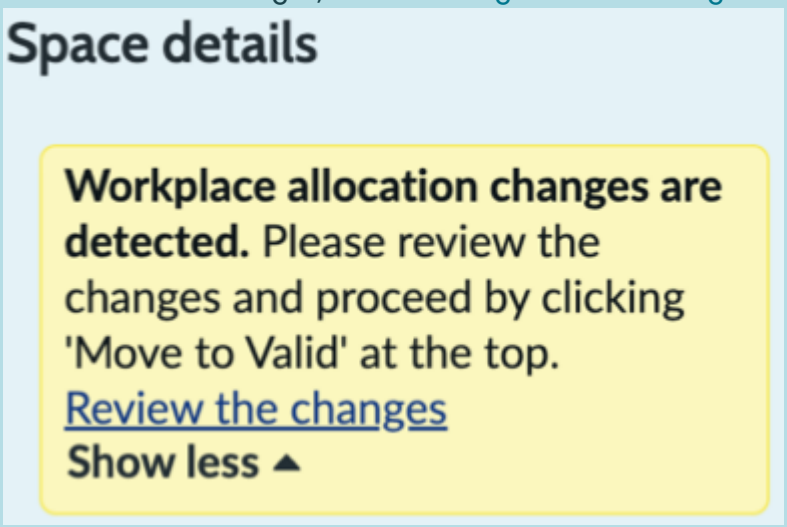
Publish a scenario

After creating a scenario and implementing the space allocation and assignment, assignment type change for a department, cost center, or neighborhood publish the scenario. Share the scenario with your colleagues or stake holders.

Before you begin

Create a scenario

Important: If allocation changes in your instance impact the scenario, the system displays a warning on the Space Details panel. You must review the changes, edit the scenario accordingly, then select **Move to valid** before continuing. For more information about allocation changes, see Reviewing allocation changes.



Role required: sn_wsd_spcmgmt.space_planner

About this task

Publish a scenario after it's created so that it's available for others to view in a read-only mode. Share the scenario with your colleagues or stakeholders to review in a read-only mode. Access the published scenario from the Space optimization module.

When you publish a scenario, the state of the scenario changes from **Draft** state to **Ready** state. For more information about the states of a scenario, refer to Scenario and Building - Views, states, settings, and key features.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**
2. Select the **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. Open the scenario that you want to publish.
   Follow any one of the following paths.

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Path	Action
From the Scenarios list section	**a.** At the end of the scenarios list, select **View all**. A list of all the scenarios created in the ap plication are displayed. **b.** Select the scenario that you want to pub lish. You can use the search and filter options on the list.
From the Buildings list section	**a.** Select the building of which you want to publish the scenario. The stack plan view of the building opens. **b.** Select **Related scenarios**. **c.** Select the scenario that you want to pub lish.

The stack plan of the selected scenario opens.

4. **Optional:** Review the scenario in the Stack plan or Floor map as required.
   Refer to Review a scenario.
5. Select **Publish**.
   The **Publish** button is available on both the Stack plan and the Floor map for a selected scenario.
   The scenario is published.

Result
The scenario is published.

View all the scenario real estate and allocation changes in detail using the **Space Deployment plan** or the **User Deployment plan** tab. The details of all the changes that you performed in the scenario are displayed. View details related to space, floor, building, type of change, current value, scenario value, and workplace cases.

What to do next
Send a scenario for approval

Send a scenario for approval

After publishing the scenario, send your scenario for approval to workplace managers of your organization.

Before you begin
Ensure the following:

1. Create a scenario
2. Publish a scenario

Role required: sn_wsd_spcmgmt.space_planner

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About this task

After you publish a scenario, send the scenario for approval. The scenario will be sent for approval to the workplace managers for approval. If there are multiple approvers for a scenario, the approval or rejection received from the workplace manager who performs it at first, is considered. You can view your approval-related details in the **Approver** tab. When a scenario is sent for an approval, the state of the scenario changes from Published to Awaiting approval and you cannot edit the scenario.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. Open the scenario that you want to send for approval.
   Follow any one of the following paths.

Path	Action
From the Scenarios list section	**a.** At the end of the scenarios list, click **View all**. A list of all the scenarios created in the ap plication are displayed. **b.** Select the scenario that you want to send for approval. You can use the search and filter options on the list.
From the Buildings list section	**a.** Select the building of which you want to send a scenario for approval. The stack plan view of the building opens. **b.** Select **Related scenarios**. **c.** Select the scenario that you want to send for approval.

   The stack plan of the selected scenario opens.
4. **Optional:** Review the scenario.
   Refer to Review a scenario.
5. **Optional:** If the scenario is not published, then publish the scenario.
   Refer to Publish a scenario.
6. After publishing, click **Send for approval** to send the scenario for approval.
7. **Optional:** Open the **Approver** tab to view your approver-related details.
8. Depending on the state of the scenario after sending for approval, do the following:

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- Rejected: If the scenario is rejected by the approver, then the state of the scenario changes to Rejected.

  To view the rejection details, do the following:

  a. Select the **Approver** tab.

  b. Search for **Rejected** state.

     Use the filter option to view Rejected state.

  c. In the **Comments**, view the comments given by the approver.

  d. Select the **Stack plan** tab to implement the changes suggested by the approver.

  e. After making the changes, click **Save**.

  f. After saving the scenario, to send the scenario for approval again, click **Send for approval.**

     The state of the scenario is again changed to Awaiting approval and you can no longer edit the scenario.

     If the scenario is rejected, you can send a scenario for approval multiple times until it is approved.

- Approved: If the scenario is approved, then the state of the scenario changes to Approved. You can no longer edit the scenario after it is approved.

9. After the scenario is approved, deploy the scenario.
   Refer to Deploy a scenario.

Result
The scenario approval process is completed.

What to do next
Deploy a scenario

Change owner of a scenario

Change the ownership of a scenario that is published and is in the Ready state. Enable other space planners also to make their changes to the scenario that you created. A can switch a scenario between multiple owners one at a time.

Before you begin
Ensure the following:

1. Create a scenario.
2. Publish a scenario

Role required: sn_wsd_spcmgmt.space_planner

About this task
Change the ownership of a published scenario to enable other space planners to implement their changes. A scenario can be worked upon by multiple space planners one at a time.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

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You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
The Workplace Analytics dashboard opens.

2. On the left pane, select **Space Optimization** icon ().
   The Space optimization dashboard opens.
3. Open the scenario for which you want to change the ownership.
   Follow any one of the following paths.

Path	Action
From the Scenarios list section	**a.** At the end of the scenarios list, click **View all**. A list of all the scenarios created in the ap plication are displayed. **b.** Select the scenario for which you want to change the ownership. You can use the search and filter options on the list.
From the Buildings list section	**a.** Select the building of which you want change the scenario ownership. The stack plan view of the building opens. **b.** Select **Related scenarios**. **c.** Select the scenario for which you want to change the ownership.

   By default, the Stack plan of the selected scenario opens.
4. Select the **Details** tab of the scenario.
   The Scenario details form opens.
5. In the **Owned by** field, select the space planner's name to whom you want to move the ownership.
6. Click **Save**.

Result

The scenario is moved to the selected space planners. You can no longer change the scenario. You can make changes to a scenario only if you are assigned as the owner of the scenario.

Deploy a scenario

After publishing a scenario plan, deploy the scenario on your production.

Before you begin

- Make sure that you have created and published a scenario. For more information, see the following topics.
  - Create a scenario
  - Publish a scenario
- Make sure that the scenario is assigned to you. You can only deploy scenarios that you own.

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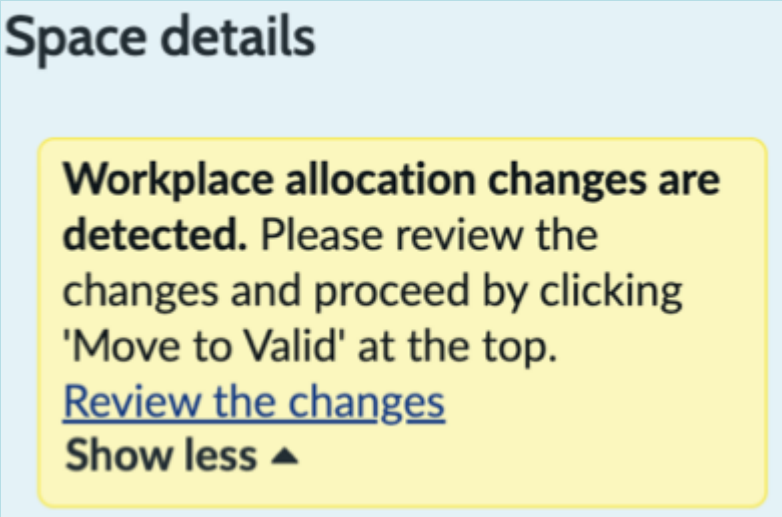
Important: If allocation changes in your instance impact the scenario, the system displays a warning on the Space Details panel. You must review the changes, edit the scenario accordingly, then select **Move to valid** before continuing. For more information about allocation changes, see Reviewing allocation changes.



Role required: sn_wsd_spcmgmt.space_planner

About this task

After you publish a scenario, you must deploy the scenario to implement the changes in the production or main building data.

Note:

- From Workplace Space Management version 1.15.0, deploying a scenario replaces existing allocations for a space with the allocations specified based on the **Group by** value.
- For Workplace Space Management 1.14.0 or earlier versions, deploying a scenario replaces all allocations for the space with new allocations, regardless of the **Group by** value.

During deployment, you can collate all move requests raised for the scenario deployment into a single move project. Using a move project, you can track move requests and also schedule based on availability. For more information about move projects, see Move project views, actions, and states.

Note: The option to create a move project appears only if there is at least one workplace user movement in the published scenario.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**
2. Select the **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. Select the scenario that you want to deploy.
   The scenario must be owned by you. To verify the owner of a scenario, you can check the **Owned by** field in the **Details** tab of the scenario.
4. Select **Deploy**.

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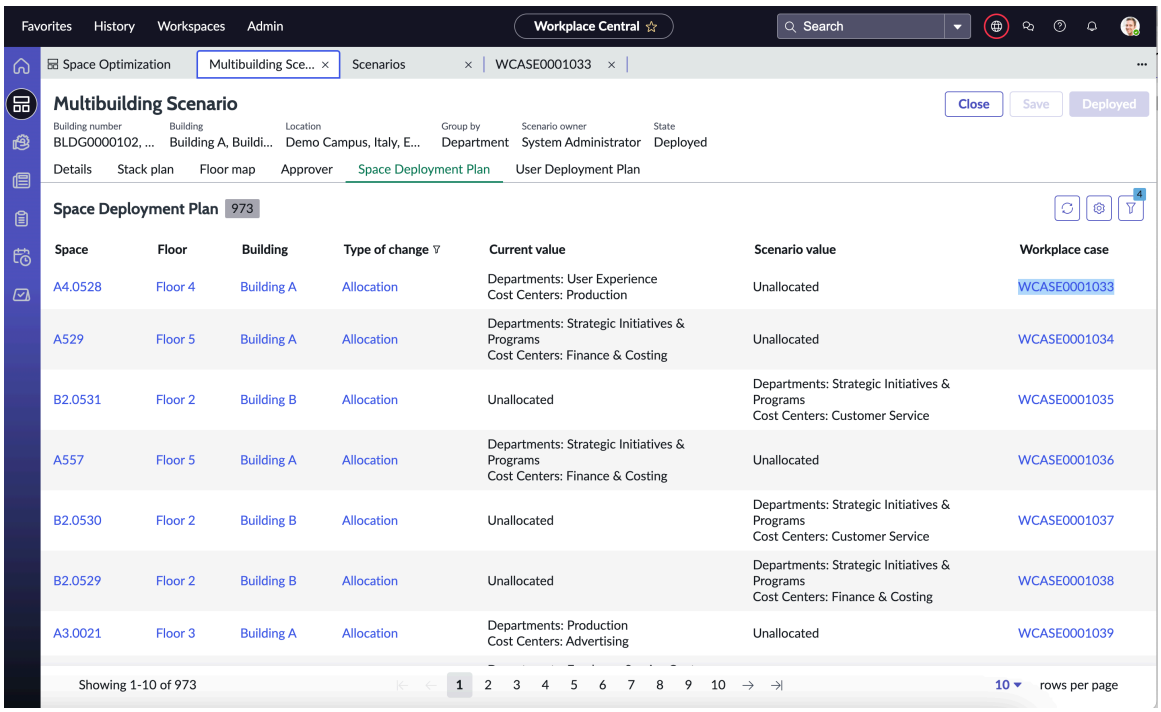
The scenario is deployed and workplace cases are created for all the allocation and assignment changes you did on a scenario.

Important: Your production data is updated with the scenario plan changes. Review the updated changes before proceeding with deployment.

Note: You can't edit it a scenario after it's deployed. You can only view the scenario by using the **View Options**.

5. **Optional:** Navigate to **Space Deployment plan** and the **User Deployment** tab.
   The details of all the changes that you performed in the scenario are displayed. You can view details for building and floor where the change was applied, space, the type of changes, the current and the scenario value.



   For more information about the space deployment plan and user deployment plan, see the following topics:

   - Space Deployment Plan
   - User Deployment Plan

6. **Optional:** In the dialog box that appears, if you want to create a move project for all the moves of the scenario, select the **Create move project** option.
   You can view all the move requests created after deploying the scenario in the move project. You can track and schedule a move request if necessary. For more information, refer to Move Management.

   Warning: The option appears only if there is at least one workplace user move in the published scenario.

7. In the dialog box that appears, select **Yes** to deploy.

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Result
The scenario is deployed. After the scenario is deployed, the state of the scenario changes to **Deployed**. Each change triggers a workplace case in the Workplace Case Management application.

Depending on the type of change, the following workplace services types are created:

- **Workplace User Assignment and Move Service via Scenario Planning**: Workplace service to update the user assignment and perform move activities related to the user.
- **Workplace Assignment Type Service**: Workplace service to change the assignment type of a space.
- **Workplace Allocation Change Service**: Workplace service to change the allocation of a space.

If you want to work on a move project for all the move requests in a deployed scenario, track the move project in the Move management workspace. To work on the move project, see Work on a move project.

View scenario change details

View details of each change that you implemented in a scenario. You can view details such as the space that is changed, the type of change, and the workplace move case associated with the change.

Before you begin
Ensure that you have created a scenario. For more information about creating a scenario, see Create a scenario.

Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read only; to view a scenario)

About this task
View details of every change made in the scenario. You can view details such as the floor where the change was applied, the space that was changed, the type of change, and the scenario value. If the scenario is in the Deployed state, you can also view the workplace move cases associated with each change implemented in the scenario.

Procedure
1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select the **Space Optimization** icon ().
   The Space optimization dashboard opens.
3. Open the scenario that you want to view by using any of the following paths.

Path	Action
From the Scenarios list section	**a.** At the end of the scenarios list, select **View all**. A list of all the scenarios created in the ap plication is displayed.

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Path	Action
	b. Select the scenario that you want to view. You can use the search and filter options on the list.
From the Buildings list section	**a.** Select the building that you want to view. The stack plan view of the building opens. **b.** Select **Related scenarios**. **c.** Select the scenario that you want to view.

The stack plan of the selected scenario opens.

4. Select the **Space Deployment plan** tab of the scenario.
   To view user-related changes, select the **User Deployment plan**.

Result

The details of every change that is implemented on the scenario is displayed. If the scenario is in the Deployed state, you can also view the workplace move cases associated with each change implemented in the scenario.

For more information about the space and user deployment plans, see the following topics:

- Space Deployment Plan
- User Deployment Plan

Create a copy of an existing scenario

Create a copy of an existing scenario and make changes. Save time from a creating a scenario from scratch if there are only minor changes to an already created scenario.

Before you begin

Ensure that the scenario that you want to copy is in one of the following state:

- Draft
- Ready

Role required: sn_wsd_spcmgmt.space_planner

About this task

Clone an existing scenario as it is using the copying process. Instead of making changes from scratch, make changes to an already created scenario by copying it. Copy a scenario that is in either the Draft state or the Ready state.

When you copy a scenario, the copy is created with the same name, but appended with '- Copy 2' to identify it easily.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**
     You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.

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The Workplace Analytics dashboard opens.

2. On the left pane, select **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. In the Scenarios list section, at the end of the scenarios list, click **View all**.
   A list of all the scenarios created in the application are displayed.
4. Select the check box next to the scenario that you want to copy.
5. On the top-right corner of the page, select the **Copy** option.

Result

After a few seconds of copying process, the scenario copy is created. To view the copy, refresh the list by selecting the Refresh list icon ( ). The scenario copy is named with the same name as the copied scenario but appended with a '- Copy 2'. For example, Scenario ABC- Copy 2. When you create a copy of an existing scenario, the scenario opens directly in the stack plan view and in the scenario mode of the copied scenario.

What to do next

To work on the scenario, refer to Create a scenario.

View or edit space allocations of a building

The Space optimization also enables you to view space allocations and make any space-related changes on a building directly. You can view a building stack plan and floor map same as scenarios.

Before you begin

Ensure that the following plugins are installed:

- Workplace Central
- Workplace Stack Plan
- Workplace Service Delivery Components
- Workplace Case Management
- Workplace Space Management
- For Floor map view, the floor maps must be created using Workplace Indoor Mapping Map studio.

Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read-only; to view a building)

About this task

You can perform several actions on a building directly instead of working them through scenario planning. The building view enables you to perform the following:

- View space allocations on each floor based on different view options. For more information on the different view by options that are available, refer to Scenario and Building - Views, states, settings, and key features.
- Get space details of each allocation on the stack plan same as in scenarios.
- Perform map-based space administration. Such as, editing or updating user assignments to a neighborhood.

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- View space allocations based on the workplace entities. This view option is supported only in the building view. You can specify the entity type based on which you want to see the space allocations.
- You can also perform changes on a building using a floor map directly. Refer to Edit a building's spaces using a map.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. In the All Buildings section, select the building for which you want to view the spaces.
   Select **View all** to view a list of buildings.
   The stack plan of the building opens.
4. To view the spaces on each floor based on their allocation that are they are assigned to, do the following:

   a. On the right panel, select the **Stack plan settings** icon ( ) to open the settings.

   b. In the **View by** field, select an option.
   The following view options are available:
      - **Department**
      - **Cost center**
      - **Neighborhood**
      - **Workplace Entity**

        When you select **Workplace Entity**, an additional field, **Workplace Entity Type** is also displayed in which you can specify the entity type, based on which you want to view the spaces.

      - **Space type**
      - **Assignment type**
      - **Space status**
      - **Space function**
      - **Occupancy status**
5. To view the space details assigned to the allocation that you selected, do the following:

   a. On the right panel, select the Space details icon ( ).

   b. On the stack plan, select the bar for which you want to view the space details.
   The details such as the space count, capacity, user assignment details and the color legend associated with the allocation is displayed on the right.

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6. To allocate a space or to change the allocation, do the following:

   a. Select the **Floor map** and the **Building** tab.

   b. Select the floor and building where the space is located using the drop-down on the top right of the map.

   c. Select a space on the map directly to view the details of that space on the right panel. You can select a single or multiple spaces by drawing a circle around them or by using the Shift key on the keyboard. The details on the right panel are displayed based on your selection.

      The spaces that are flexible, assigned, and unassigned spaces are highlighted with different color codes. The legend of these color codes is displayed on the map. If a space is assigned to any user, an avatar icon is displayed with the number of users assigned to that space.

   d. On the side panel, select **Edit Spaces**.
   A page opens displaying the list of selected spaces.

   e. Select the spaces for which you want to change the allocation.

   f. Select the **Allocations** drop-down.

   g. Depending on the allocation change that you want to make, select one of the following:
      - **Change allocation**: To change the existing allocation.
      - **Add allocation**: To add an allocation.
      - **Remove allocation**: To remove the existing allocation.

   h. On the window that opens, in the **Allocation type** field, select the allocation type. You can also select any allocations depending on the requirement.

   i. Select **Apply**.

   j. On the confirmation window, review the changes that are about to be implemented and select **Confirm**.
   The allocation changes are saved automatically.

Edit or view a building's spaces based on workplace entities

View the spaces in a building based on their entity types. On the floor map, directly add an allocation or modify an allocation of space. Assign spaces to a workplace entity from the floor map.

Before you begin

View or edit space allocations of a building

Important: You can view spaces based on their workplace entities only for a building. You cannot create or view a scenario based on workplace entities.

Role required: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.scenario_reader (read-only; to view a building)

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About this task

You can view a building's spaces based on different entity types that you configured in the application. The stack plan enables you to view the number of spaces assigned to each entity. View the hierarchy of each entity that is, view the child and parent workplace entities.

From the floor map view of the building, directly assign a space to a workplace entity or change an existing allocation of a space.

You can also perform changes on a building using a floor map directly. Refer to Edit a building's spaces using a map.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select the **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. In the All Buildings section, select the building for which you want to view the spaces.
   Select **View all** to view a list of buildings.
   The stack plan of the building opens.
4. To view the spaces on each floor based on the workplace entities that are they are assigned to, do the following:

   a. On the right panel, select the Stack plan settings icon ( ) to open the settings.

   b. In the **View by** field, select **Workplace Entity**.

   c. In the **Workplace Entity Type** field, specify the entity type based on which you want to view the workplace entities.
   If you want to view all the workplace entities irrespective of their entity types, select **All levels**.

5. To view the space details assigned to each workplace entity, do the following:

   a. On the right panel, select the Space details icon ( ).

   b. On the stack plan, select the bar of the workplace entity for which you want to view the space details.
   The details of the workplace entity such as the space count, capacity, user assignment details and the color legend associated with the entity is displayed on the right.

   Spaces that are not assigned to the selected workplace entity directly or indirectly (to any lower hierarchy entity types that can be resolved to the selected workplace entity) are assigned to the higher hierarchy of the workplace entity are displayed as **Others**.

6. To view the hierarchy of the workplace entity, do the following:

   a. Select the workplace entity for which you want to view the hierarchy.
   Select the bar on the floor.

   b. In the Space details panel, go to the Workplace Entity section.

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c. Select the hierarchy icon ( ) next to the color legend of the workplace entity.
The legend displays the color of the entity and the number of spaces assigned to that entity on the floor.

A window opens displaying the details of the workplace entity and its hierarchy. The number of spaces assigned to each entity in the hierarchy is clearly detailed.

d. **Optional:** On the window, select the expand icon ( ) to view the list of below level entities and the number of spaces assigned to it.
Point to the info icon ( ) to view the number of spaces directly assigned to that entity level out of the total assignments on it and its sublevels in the hierarchy.

7. To allocate a space to a workplace entity or to change the allocation, do the following:

a. Select the **Floor map** tab.

b. Select the floor where the space is located using the drop-down on the top right of the map.

c. Select a space on the map directly to view the details of that space on the right panel.
You can select a single or multiple spaces by drawing a circle around them or by using the Shift key on the keyboard. The details on the right panel are displayed based on your selection.

The spaces are highlighted with different colors based on their allocation. The legend of colors is the displayed on the map. If a space is assigned to any user, an avatar icon is displayed with the number of users assigned to that space.

d. On the side panel, select **Edit Spaces**.
A page opens displaying the list of selected spaces.

e. Select the spaces for which you want to change the allocation to a workplace entity.

f. Select the **Allocations** drop-down.

g. Depending on the allocation change that you want to make, select one of the following:
- **Change allocation**: To change the existing allocation to a workplace entity.
- **Add allocation**: To add the workplace entity allocation.
- **Remove allocation**: To remove the existing allocation.

h. On the window that opens, in the **Allocation type** field, select **Workplace entity**.
You can also select other allocations depending on the requirement.

i. In the **Entity type** field, select the entity type to which the space belongs.

j. In the **Workplace entity** field, select the workplace entity to which the space belongs.

k. Select **Apply**.

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l. On the confirmation window, review the changes that are about to be implemented and select **Confirm**.
The allocation changes are saved automatically.

Work on a space assist request

As a space planner, fulfill workplace space assistance requests. View the selected space plan of the request and deploy accordingly. You can also assign the request to another assignment group or a user.

Before you begin

Ensure that you have the following:

- Workplace Central
- Workplace Case Management
- Workplace Space Management
- For Floor map view, the floor maps must be created using Workplace Indoor Mapping Map studio.

Role required: sn_wsd_spcmgmt.space_planner

About this task

When a space request is submitted, a workplace case is created in the application. The Workplace Central Space Optimization dashboard enables you to view all the space request-related workplace cases at one place. As a space planner you can perform the following actions on a request:

- View space requests submitted by users. You can view a request even if the user has not selected any option. Such workplace cases are set with the Work in progress state.
- Track the total number of space requests created in the organization using the Space Optimization metrics board. You can also view the detailed list of the space requests.
- Monitor the state of a space request and work on it accordingly.
- View the selected space plan of a space request and deploy it.
- Assign the space request to another assignment group or a user.
- View the space plan on a floor map and visualize the seating before deployment.
- Add work notes on the request. Work notes are displayed only to the space planner who is working on that request.
- Add comments on the request so that the user can view. You can inform the progress or notify them with any information that they must know.

For a detailed information about the functionality, views, and states, refer to Space request approvals, states, actions, and key features.

Note: You can deploy only a space request that is in the Approved state.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.

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The Workplace Analytics dashboard opens.

2. On the left pane, select **Space Optimization** icon ().
   The Space optimization dashboard opens.
3. To open a space request, do one of the following:
   - In the **Scenarios** metrics section, select **All space requests**.
   - In the **Space requests** section, select **View all**.

   Space Requests tab opens.
4. **Optional:** Apply filters and sort options on the list to filter out the request.
5. Select the workplace case of the space request that you want to work on.
   The workplace case opens in a separate tab and displays various details of the request. For detailed information of the various options displayed on the request, refer to Space request approvals, states, actions, and key features.
6. **Optional:** In the **Workplace Case** panel, you can perform any of the following:
   - To assign the space request to another assignment group, edit the **Assignment group** field.
   - To assign the space request to another user directly, specify the user in the **Assigned to** field.
   - Scroll to view the request details and the variables provided by the requester.
7. In the **Activity** panel, you can perform any of the following:
   - Add comments in the **Comments** section and select **Post comments** to notify users with any information.
   - Add work notes in the **Work notes** section and select **Post Work notes (Private)** to notify other space planners who are working on the request. Work notes are not displayed to the requester.
8. Select the **Space plan** tab to view the space plan that is selected by the requester.

   You can also view the space on the map by selecting the **View spaces on map.**

   ⚠ **Warning:** You can view the space plan only if the requester selects an option. If the requester has not selected any option, the **Space plan** tab doesn't display any information.
9. Select the **Approvals** tab to view the approver details of the space request.
10. Select the **Space Deployment plan** to view the space allocation details such as the type of change, current value, and the scenario value.
11. Select the **Floor map** tab to view the space plan on a floor map.
    The legend of the color related with each department is displayed on the right panel.

    ℹ **Note:** You can view the floor map only if the floor on which the space plan is made has a floor map configured. Ensure that you have configured Indoor Mapping as your map provider to view maps and have the Indoor Mapping components plugin. For more information, see Customize the map properties.
12. After making changes, select **Save**.
13. To deploy the space plan, do the following:

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a. Select the **Space Deployment plan** tab.

b. Review the space plan and allocations if required.

c. Click **Deploy**.
The space plan selected in the request is deployed.

Result

The space plan is deployed for the space request. The state of the request is changed to Deployment in progress until all the space allocations are implemented. For every allocation, a workplace case is created for it. When deployment is in progress, the following actions are performed:

- If any one workplace case associated with an allocation is unsuccessful, that is, if the state is changed to Closed incomplete. In such cases, the deployment fails and the state of the space request is set to Closed incomplete. You can add comments if you want to notify the user with the failure details.
- If all the workplace cases associated with allocations are successfully implemented, that is, they all have the state set to Closed complete, then the deployment is successful. When the deployment is successful, the space request is set to Closed complete.

Map based space administration

As a space planner, perform space assignments, user assignments and other actions on a building using the building's floor map directly.

The floor map view of a building enables you to visualize the changes in real time. You can implement any actions on the map, such as space allocations, neighborhood allocations, employee assignment, and employee movement.

Install the following plugins:

- Workplace Central
- Workplace Case Management
- Workplace Space Management
- For Floor map view, the floor maps must be created using Workplace Indoor Mapping Map studio.

Edit a building's spaces using a map

Space planners and administrators can update space attributes and allocation changes using interactive floor maps. Select and edit a single space or update bulk spaces via floor maps. Add, change, or remove space allocations as required. The updated space attributes and association changes are reflected in real-time on a floor map.

Before you begin

Role required: sn_wsd_spcmgmt.space_planner

Procedure

1. Navigate to **All** > **Workplace Central** > **Space Optimization** > **All Buildings**.
2. Select **View All** and select a building from the list of buildings.
3. On the Stack plan, select the Stack plan settings icon () from the right pane to display different view options.
4. Select **View by** to select the view based on which the spaces on the floor must be categorized. The following view options are available:

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- Assignment type
- Cost center
- Department
- Neighborhood
- Occupancy status
- Space type
- Space status
- Space function
- Workplace entity

The spaces are displayed based on the selected view.

5. To display the Space details for a selected stack bar, select the Space details icon ().
6. To view the space allocations on a map, select the **Floor Map** tab.
   The floor map of the selected floor on the stack plan is displayed. The spaces are highlighted based on the view option that you selected.
7. To change the floors, use the **Floor** option.
8. To view the details of selected spaces, select the Space details icon ().
   Space details like the space count, assigned profiles, and department details are displayed on the panel.

   You can select the copy link () icon to copy a shareable link to the selected floor or space. You cannot share multiple spaces.

9. To change the view, on the right pane, select the Map Settings icon ().
   In the Map Settings panel, you can perform the following actions:
   - **Change the floor map view**: Select the **View by** option. The following view options are available:
     - Assignment type
     - Cost center
     - Department
     - Neighborhood
     - Occupancy status
     - Space type
     - Space status
     - Space function
     - Workplace entity
   - View spaces based on assignment: You can enable or disable the following settings:
     - **Assigned to**: View the users to whom a space is assigned.
     - **Assignment type**: View the assignment type of a space.
     - **Show base map**: Option to disable color-coded spaces on the map. The map displays color-coded spaces as defined in Map Studio.
     - **Opacity %**: Opacity of the colored spaces on the map. You can reduce the opacity if some map elements are hidden due to the colored spaces.

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10. To zoom on the space on the map, use the zoom options displayed on the bottom right of the map.
11. To edit the space attributes or its allocation details, do the following:

    a. Select either a single space or bulk spaces.

    You can select multiple spaces by holding **Shift** and drawing a circle (lasso) around the spaces.

    You can also select spaces based on a filter query by selecting the filter icon ( ). On the Filter spaces pop-up, you can add the conditions select the spaces based on your requirement. For example, `Department is Human Resources OR Department is Risk Management`.

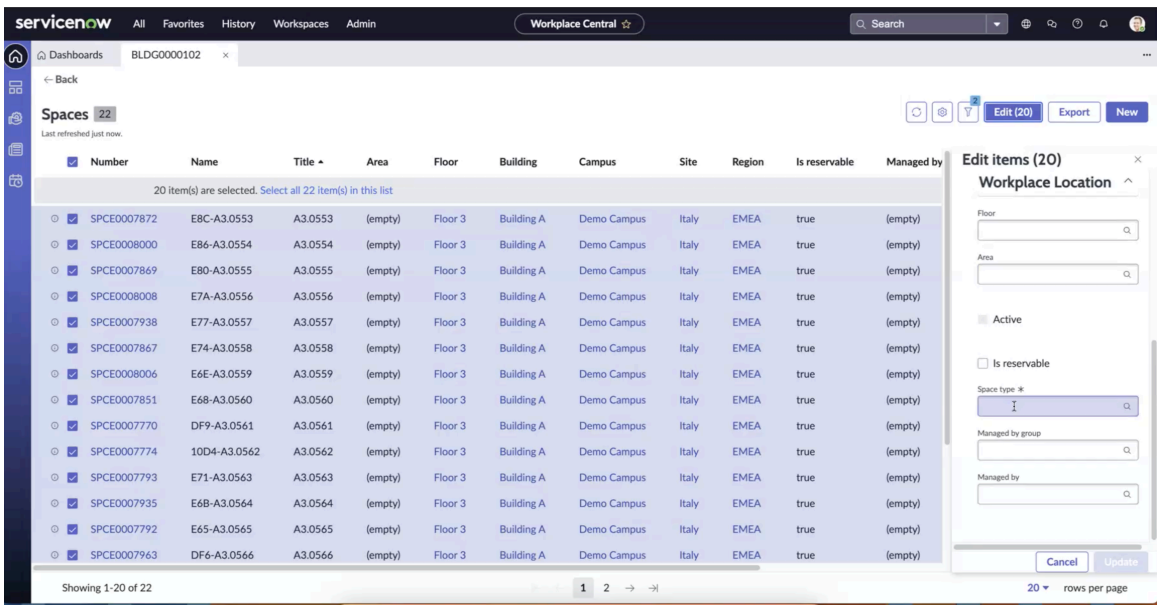
    You can also use Related list conditions to apply filtering on related tables. Make sure to set the Greater than or equal to operator value to 1 for accurate results.

    For more information about conditions, see Condition builder .

    b. After the selection, to edit the spaces, on the right pane, select the **Edit Space** option under the **Space details** section.
    A new tab opens with a list view of the selected spaces. You can configure the columns based on which you want to view the spaces and also make edits and perform allocation changes. The updated changes are reflected in real time on a floor map.

    c. Select the spaces that you want to edit using the check box.

    Note: Enable the system property **glide.lists.inline_editing_enabled** for making inline edits in the list pages.



    d. After selecting the required spaces, select **Edit**.

    e. The right panel opens in the **Edit** mode.

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f. After making the required space attributes and association changes, select **Update** to save the changes.

g. If there are spaces with similar names for a selected floor, a message is shown to change the space name.

h. Duplicate spaces are also shown so that they can be removed.

i. Take appropriate actions to change floor names and remove duplicate spaces.

j. To update space allocation details, select required spaces from the list view and select the **Allocation** drop-down list to add, change, or remove space allocations.

Allocation options

Field	Description
Add Allocation	Select **Add allocation** from the drop-down list to add new space allocations. i. From the **Allocation type** drop-down list, select the allocation type. ii. Based on the **Allocation type** selection, select the required option. iii. Select **Apply**.
Change Allocation	Select **Change allocation** from the drop-down list to change or update space allocation. i. From the **Allocation type** drop-down list, select the allocation type. ii. Based on the **Allocation type** selection, select the required option. iii. Select **Apply**.
Remove Allocation	Select **Remove allocation** from the drop-down list to remove the selected space allocation. i. Select the allocation from the **Allocation type** list, ii. Select the required option, based on the **Allocation type** selection. iii. Select **Apply**.

k. Additionally, select **Export** to export the bulk space record data to Excel, JSON, HTML, or CSV.

l. Select the **Delivery type** list and select **Download** or **Email** to download or email the selected space record data.

m. Select **New** to add a workplace location and update the required fields.

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For more information, see Managing workplace locations.

n. After performing the changes, select **Save**.

12. Select **Back** to navigate back to **Floor Map**.
    Any changes that you make to space records are applied in real-time and available on the floor Map of the selected space.

Move employees on a floor or to a different floor using the map

Using the building's Floor map view, move single or multiple employees on a floor or to a different floor. Assign or unassign a space to an employee.

Before you begin

Verify that the building in which you want to move employees has a floor map.

Note: You must install the Workplace Move Management plugin to move an employee to a different location.

Important: You can't move an employee who already has an ongoing move request.

Role required: sn_wsd_spcmgmt.space_planner

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select the **Space Optimization** icon ( ).
   The Space optimization dashboard opens.
3. In the All Buildings section, select the building where you want to make employee movements.

   Important: You can't move an employee who already has an ongoing move request.

   Select **View all** to view a list of buildings.

   The stack plan of the building opens.
4. On the Stack plan, select the **Floor map** tab to view the building's floor map.
5. Select the floor where you want to move employees using the **Floor** option on the map.
6. On the side panel, select **Users**
   The floor map displays user icons based on employee assignments.

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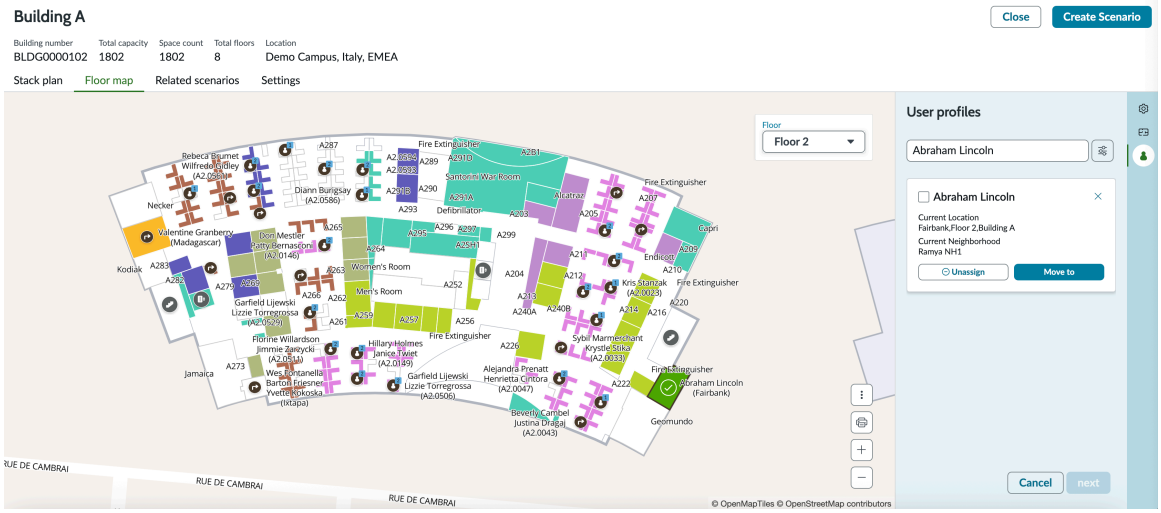

On the map, spaces assigned to an employee, spaces with move cases, and selected spaces are displayed with the following icons:

7. To view the details of the employees assigned to a space, select the User or the Move options on the space.

   You can also search for an employee to view their details.

   You can select multiple users by drawing a circle (lasso) around them or by using the Shift key on the keyboard. Selected spaces are highlighted with the Selected employee icon ( ). The details of the assigned employees are displayed on the **User profiles** panel. For the Neighborhood view by configuration, the neighborhood details are displayed on the user card. If there's an ongoing move case, then move case details are displayed.

8. To view the details of the move case on a space, select the move case option on the space. You can select multiple users by drawing a circle (lasso) around them or by using the Shift key on the keyboard. Selected spaces are highlighted with the Selected employee icon ( ). The details of the incoming or outgoing move case are displayed on the **User profiles** panel. An incoming move case is tagged as **Incoming** and an outgoing move case is tagged as **Outgoing**. You can select the move case number to view the move case details on a separate tab.

9. To move an employee to a different location, follow these steps:

   Important:

   If **Neighborhood** is selected as the group by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other group by option, assignments that have the **Location assignment** type are applicable.

   a. Select the space on the map where the employee is assigned.
   The employee details are displayed on the **User profiles** panel.

   b. On the employee details tile, to move the employee, select **Move to**.
   You can also select the destination space by selecting the space from the floor map.

   c. In the **Actions** field, select the type of move you want to perform.
   You can select from the following options:

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- Assign or move to space: Select this option to move the employee to a different space.
- Assign or move to area: Select this option to move the employee to a different area.
- Assign or move to floor: Select this option to move the employee to a different floor.
- Assign or move to building: Select this option to move the employee to another building.
- Unassign: Select this option to unassign the space to the employee.

Note: The **Select building** field is set by default with the current building. You can't change the building.

d. In the **Select neighborhood** field, select the neighborhood where you want to move the employee.

This field is available only if the View by configuration is neighborhood.

To move employees with neighborhood assignments, you can only select spaces that are assigned to a neighborhood.

Note: If an employee is selected more than once, all actions related to the employee are set to invalid.

e. In the **Select floor** field, select the floor where you want to move the employee.

f. In the **Assign area** field, select the area where you want to move the employee.

g. In the **Assign space** field, select the space where you want to move the employee.

h. Select **Apply**.

i. On the confirmation window, review the entries, then select **Confirm**.
A move request is created to perform the move. The map displays the space from where the employee is moved and the space where the employee is to be moved are marked with the move symbol.

10. To unassign an employee from a space, do the following:

a. Select the space on the map where the employee is assigned.
The employee details are displayed on the **User profiles** panel.

b. On the employee details tile, to unassign the employee from the space, select **Unassign**.

c. On the form, select **Apply**.

d. On the confirmation window, review and select **Confirm**.
Unassigning a neighborhood assignment for an employee deactivates the assignment in the Workplace Profile.
The employee is unassigned from the space.

11. To assign an employee to a space, do the following:

Important: You can't move an employee who already has an ongoing move request.

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a. Select the space on the map where you want to assign the employees.
The details are displayed on the **User profiles** panel. If there's an existing move case or if there are existing employees, the respective details are displayed on the panel.

b. Search and select the employees.
Perform one of the following to search:

- In the **Search users** field, search for the employee whom you want to assign.

  From the list, select the user.

- For an advanced search, select the Search users slider icon ( ).

  i. On the **Select users** window, search from a list of **System users** or **Workplace profiles**.

  ii. Select the employees and select **Select users**.

The selected employees are added to the panel.

- If the selected employee doesn't have any existing location, the **Current location** isn't displayed.
- If the selected employee is already assigned to a location, the location details are displayed in the **Current Location**.

c. To assign an employee who isn't assigned to any location already, do the following:

Important: You can't move an employee who already has an ongoing move request.

i. On the employee details tile of that employee, select **Assign to**.

ii. On the form, specify the type of assignment in the **Actions** field and the location details in the **Select floor**, **Assign area**, and **Assign space** fields accordingly.

iii. Select **Apply**.

iv. On the confirmation window, review and select **Confirm**.

The selected space is assigned to the workplace profile of the employee. If a primary space is already assigned to the workplace profile, the selected space is assigned with the **Is primary** field set to false.

d. To assign an employee who is already assigned to a space, do the following:

Important: You can't move an employee who already has an ongoing move request.

i. On the employee details tile of that employee, select **Assign to**.

ii. On the form, specify the type of assignment in the **Actions** field and the location details in the **Select floor**, **Assign area**, and **Assign space** fields accordingly.

iii. Select **Apply**.

iv. On the confirmation window, review and select **Confirm**.

The selected space is assigned to the workplace profile of the employee and the earlier space is unassigned. If a primary space is already assigned to the workplace profile, the selected space is assigned with the **Is primary** field set to false.

12. To perform multiple employee moves, assignment or unassignment at a time, do the following:

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Important: You can't move an employee who already has an ongoing move request.

a. Select and hold down the **Shift** key to draw a circle (lasso) or draw any freehand selection border around the spaces.

   The selected spaces are marked with the selected icon  icon. The employee details and the move cases on the selected spaces are displayed on the **User profiles** panel.

b. On the panel, perform the steps 9, 10 and 11 accordingly.

   Select the check box on the employee details tile if you have multiple changes and perform the actions.

   To assign a space to an employee, use the **Assign to** option.

   To move an employee from the existing space to another space, use the **Move to** option.

   To unassign an employee from the space, use the **Unassign** option.

Working with Schedule Planning

Create and execute schedule plans to assign workspaces to your employees.

Create a schedule plan

Create a schedule plan to assign employees, spaces, and employee-space mappings for your projects.

Before you begin

Important: The admin must set a value for the *sn_wsd_core.ALLOCATION_TYPE* property to enable schedule planning.

You can create schedule plans for projects that are assigned to you. Projects can be assigned to a user from the following fields:

- **Primary contact** field of the department
- **Manager** field of the cost center
- **Managed by group** or **Managed by** field of the workplace entity

Only one of the fields is considered for the project list based on the *sn_wsd_core.ALLOCATION_TYPE* property. For example, if the allocation type is Department, the project list only displays the departments that you are the primary contact for.

Role required: sn_wsd_spcmgmt.project_owner

Procedure

1. Navigate to **All** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center by navigating to **Workspaces** > **Workplace Central**.
2. Select the **Schedule Planner** icon ().
3. On the Schedule Plans list, select **Create schedule plan**.
4. On the details page, fill in the fields, then select **Next**.
   For a description of the field values, see Schedule Plan details form.
   A schedule plan record is created in the **Draft** state.

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5. On the User selection page, select the users that you want to include in the schedule plan, then select **Next**.
   The user selection limit is based on the value of the *WSMConstants.SCHEDULE_PLAN.USER_SELECTION_LIMIT* constant. The default selection limit is 1000.

   Note: If the *sn_wsd_core.ALLOCATION_TYPE* property is set to Department or Cost Center, the users are displayed from the Users [sys_user] table. If the property is set to Workplace Entity, the users are displayed from the User Workplace Profile [sn_wsd_core_workplace_profile] table.

6. On the Space selection page, select the workspaces that you want to include in the schedule plan, then select **Next**.
   The space selection limit is based on the value of the *WSMConstants.SCHEDULE_PLAN.SPACE_SELECTION_LIMIT* constant. The default selection limit is 1000.

   Note: The spaces are displayed from the Allocation [sn_wsd_spcmgmt_location_cc_dept_map] table.

7. After the system creates a mapping for the users and workspaces, select **Validate**.

   Note: The mapping for users and spaces is generated randomly. You can modify the mapping by editing the user and workspace columns.

   Based on the selected workspaces and users, the system may prompt you to resolve warnings and errors. The schedule plan can be created with warnings. However, you must fix the errors to create the schedule plan.

   You can view the error or warning in the **Validation Issues** column.

   Validation Issues

Validation issue	Issue type	Description
User Not Found	Error	The user field mapped to the space is empty. Map a user to the space to resolve the error.
Space Not Found	Error	The space field mapped to the user is empty. Map a space to the user to resolve the error.
User Entry Duplicated	Warning	The user is mapped to multiple spaces.
Space Entry Duplicated	Warning	The space is mapped to multiple users.

8. Resolve the errors and warnings, then select **Create plan**.

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Result
The schedule plan record is moved to the **In Progress** state. The system takes some time to assign the workspaces to the workplace profile of the users. You can view the progress in the Assignments tab.

If a user has an existing Workplace Profile Location Assignment, the schedule plan creates a non-primary location assignment. If a user does not have a workplace profile, the system creates a workplace profile and a primary location assignment.

After a schedule plan is published, the selected users receive an email with details about their workspace assignment and the start and end date of the schedule.

Edit a schedule plan

Edit a schedule plan to change the details, selected users, or selected spaces.

Before you begin
You can only edit a schedule plan that is in the Draft state and assigned to you. If a schedule plan is not in the Draft state, you can only change the **Name**, **Assigned to**, and **Description** fields.

Role required: sn_wsd_spcmgmt.project_owner

Procedure
1. Navigate to **All** > **Workplace Central**, then select the **Schedule Planning** module.
   You can also open Workplace Central from the Employee Center by navigating to **Workspaces** > **Workplace Central**.
2. Select the **Schedule Planner** icon ( ).
3. From the Schedule Plans list, select the draft schedule plan that you want to edit.
4. Change the Details, User selection, or Space selection based on your requirement.
   You can navigate to the required page by selecting **Back** or **Next**. Adding more users or spaces does not change the existing mappings.

   Note: Changing the Project, Schedule, Start date, or End date fields resets the User selection, Space selection, and Mapping pages.

5. Navigate to the Mapping page, then select **Create Plan**.
   For more information about user-space mapping and validation, see Create a schedule plan.

Cancel a schedule plan

Cancel a schedule plan to deactivate the location assignment records for your employees.

Before you begin
You can only cancel schedule plans that are in the Draft or Published state.

Role required: sn_wsd_spcmgmt.project_owner

Procedure
1. Navigate to **All** > **Workplace Central**, then select the **Schedule Planning** module.
   You can also open Workplace Central from the Employee Center by navigating to **Workspaces** > **Workplace Central**.
2. Select the **Schedule Planner** icon ( ).
3. From the Schedule Plans list, select the schedule plan that you want to cancel.

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4. On the schedule plan details page, select **Cancel**.
   You can also delete the schedule plan by selecting **Delete** from the context menu. Deleting a schedule plan also deletes the respective location assignments.

Result
The schedule plan is moved to the Canceled state. If the schedule plan was published before being cancelled, the location assignments created in the plan are made inactive.

Working with Workplace Analytics

As a workplace manager or administrator, use the Workplace Analytics dashboard to access key metrics for space optimization, maintenance management, lease administration, and Occupancy Insights to help you make effective decisions.

Ensure that you have the required set of permissions to view the dashboards.

View Space Optimization metrics

Use the Space Optimization dashboard Workplace Analytics to analyze space capacity and utilization trends to achieve optimal use of workspaces.

Prerequisites for accessing the Space Optimization dashboard

- Ensure that the Workplace Central application is installed. For more information, see Install Workplace Central
- Ensure that the Workplace Space Management (sn_wsd_spcmgmt) application is installed. For more information, see Install Workplace Space Management.
- Ensure that the Workplace Central and Workplace Space Management applications and all of their associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Run the scheduled job *`Workplace Analytics Space Management report data generation`* before viewing the Space Optimization dashboard for the first time. For more information, see Run the scheduled job for the Space Optimization dashboard.

Accessing the dashboard

To access the Space Optimization dashboard, you must have any of the following roles: sn_wsd_spcmgmt.space_planner, sn_wsd_spcmgmt.manager, sn_wsd_rsv.manager, or sn_wsd_core.workplace_manager.

Access the dashboard using one of the following navigation paths:

- **All** > **Workplace Central** > **Workplace Central**.
- **Workspaces** > **Workplace Central**

Reports

The following default reports show data for the past year only. You can adjust the data range by using the available filters for Date, Region, Site, Campus, Allocation, Workplace entity.

Allocation type [sn_wsd_core.ALLOCATION_TYPE] enables you to specify an allocation type based on space utilization. Only allocations that are active in the selected time frame are considered for the reports. For more information, see Allocate a cost center, department, or workplace entity.

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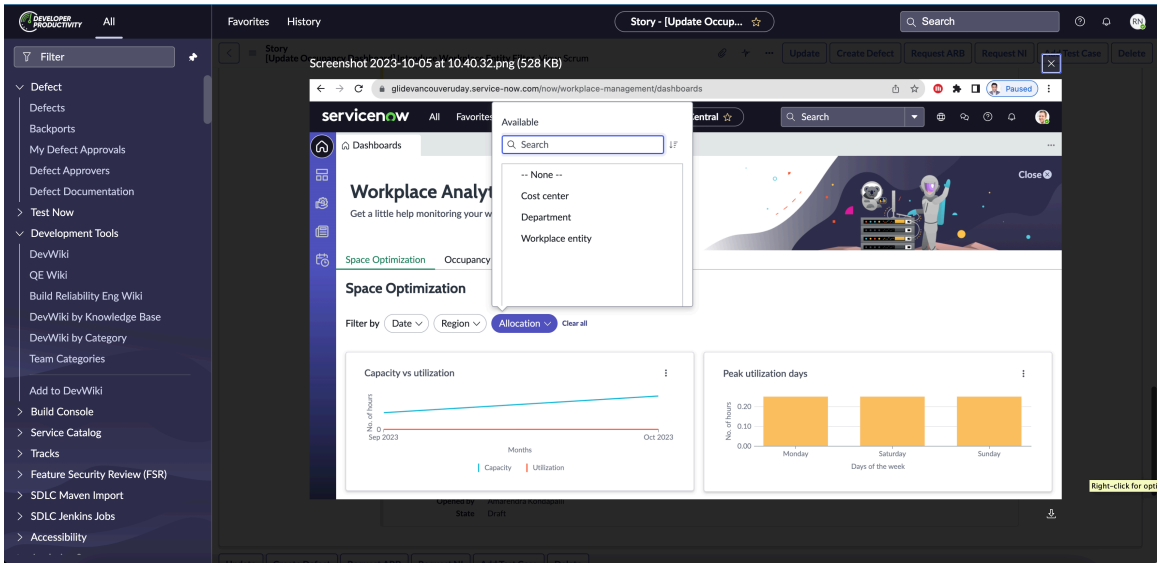
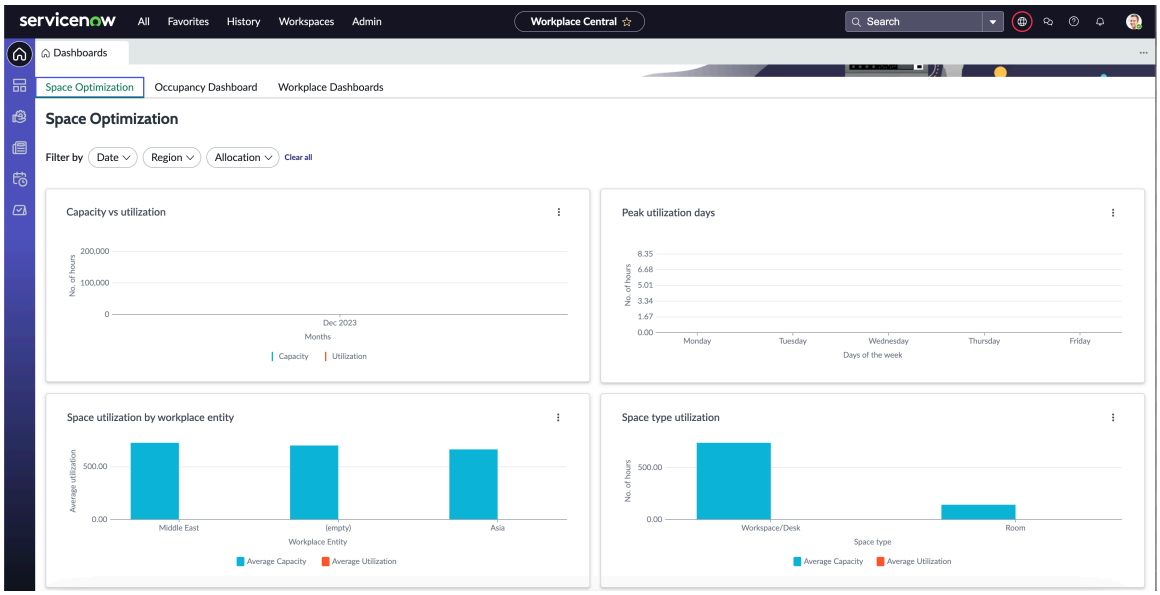


For more information, see Allocation - types, setting, and impact.

The Space Optimization dashboard also enables you to visualize data based on the Entity type. Manage space allocations based on the workplace entity to ensure proper space utilization.



For more information, see Map designated workspaces to user profiles.

Capacity is calculated based on the following criteria:

- Total capacity is the total number of hours an active space is available for reservation.
- Capacity is calculated using the reservation properties **Start time of the working day** and **End time of the working day**.

Utilization is calculated using the following criteria:

- For employees with permanent seat allocation, space utilization is calculated using the reservation properties Start time of the working day [sn_wsd_rsv.day_start] and End time of the working day [sn_wsd_rsv.day_end].
- For employees that don't have a permanent seat allocation, space utilization is calculated from the total reservation time in day's work shift hours. The work shift or office hours is calculated

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from the Start time of the working day [sn_wsd_rsv.day_start] and End time of the working day [sn_wsd_rsv.day_end].

- For example, if the office work hours are 9 hours and a meeting room is reserved for 11 hours, the total utilization in this case is 9 hours. The Start time of the working day [sn_wsd_rsv.day_start] and End time of the working day [sn_wsd_rsv.day_end] properties are used while calculating office hours. The unallocated hours in a day for a reserved space aren't considered while calculating the total reservation time duration for a day or a multi-day reservation. The reservation property for office hours is set in **(** > **All** > **Workplace Reservation Management** > **Properties**.

Capacity vs utilization

This report facet displays the available space resources versus its occupancy.

Benefits:

- Select the more options icon (⋮) to refresh the report.
- Insight into the space availability versus the occupancy trend.
- Enables you to reconfigure your space assignments and space optimization to achieve optimal resource utilization.
- A desk can be shared by multiple workplace entities.

  For example, a seat or desk is shared by user A and user B. If user A reserves the seat, the application checks the workplace entity of User A and calculates the space utilization and capacity ratio.
- Select a report facet or card and double-click to see the details.

Peak utilization days

This report displays the average utilization for days of the week.

Benefits:

- Select the more options icon (⋮) to refresh the report.
- Insight into the space utilization for the days of the week.
- Enables you to prioritize resources according to the demand.
- Select a report facet and double-click to see the details.

Calculation:

```
Average utilization = [Total utilization in hours for a weekday/Number of spaces available for the week day]
```

Space utilization by workplace entity

This report facet displays the average capacity and average utilization based on the workplace entity.

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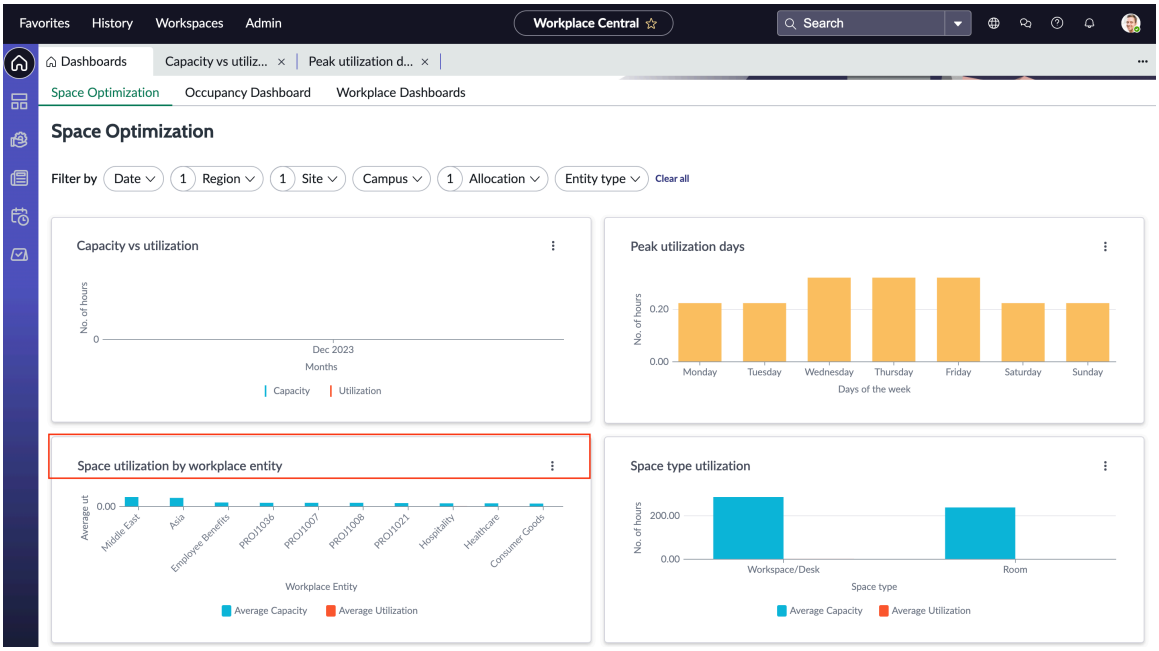

Benefits:

- Select the more options icon (⋮) to refresh the report.
- Select the **Allocation** tab in the Filter by options and allocate by different workplace entity.
- Select **Entity type** in the Filter by options and select a workplace entity to view the space utilization metrics for a selected entity.
- Compare the set of data for average capacity and average utilization for a workplace entity.
- Select a report facet and double-click to see the details.

Calculation:

```
Average capacity by workplace entity = [Total capacity in hours for a workplace entity/Number of spaces available for a workplace entity]
```

Space type utilization

This report facet displays the average capacity and average utilization for a space type.

Benefits:

- Select the more options icon (⋮) to refresh the report.
- Compare data for average capacity and average utilization for a space type.
- Add or remove space types to achieve the optimal space optimization.

Calculation:

```
Average capacity by space type = [Total capacity in hours for a space type based on the office hours/Number of spaces available for a workplace entity]
```

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Customizing widgets

You can customize the widgets to display relevant metrics by using the UI Builder. For more information, see UI Builder tutorial.

Run the scheduled job for the Space Optimization dashboard

As an admin, run the scheduled job *Workplace Analytics Space Management report data generation* to calculate capacity and utilization for all spaces.

Before you begin
Role required: admin

About this task
This job should be run before viewing the dashboard for the first time. The job calculates capacity and utilization for all spaces and populates an internal table from which the dashboards are populated.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Job**.
2. Select **Workplace Analytics Space Management report data generation** from the list.
3. Select **Execute Now** to run the job.

View Occupancy Dashboard

Workplace administrators and managers can view the workspace occupancy metrics to plan and optimize the workplace space utilization.

Before you begin
To view the Occupancy Dashboard report, ensure you have:

- Installed Workplace Central (sn_wsd_central) application plugin.
- Workplace users must have an employee profile created.
- Workplace users must have a workplace location assigned in the employee profile.

Workplace users with the following roles can access the Occupancy Dashboard report:

- sn_wsd_central.workplace_analytics_user
- sn_wsd_wc.manager
- sn_wsd_wc.user

Role required: sn_wsd_wc.admin

Procedure

1. Navigate to **All** > **Workplace Central**.
   The Workplace Analytics dashboard is displayed.
2. Select **Occupancy Dashboard**.
3. Filter by **Date**, **Region**, **Cost center**, **Department**, or **Workplace entity**.

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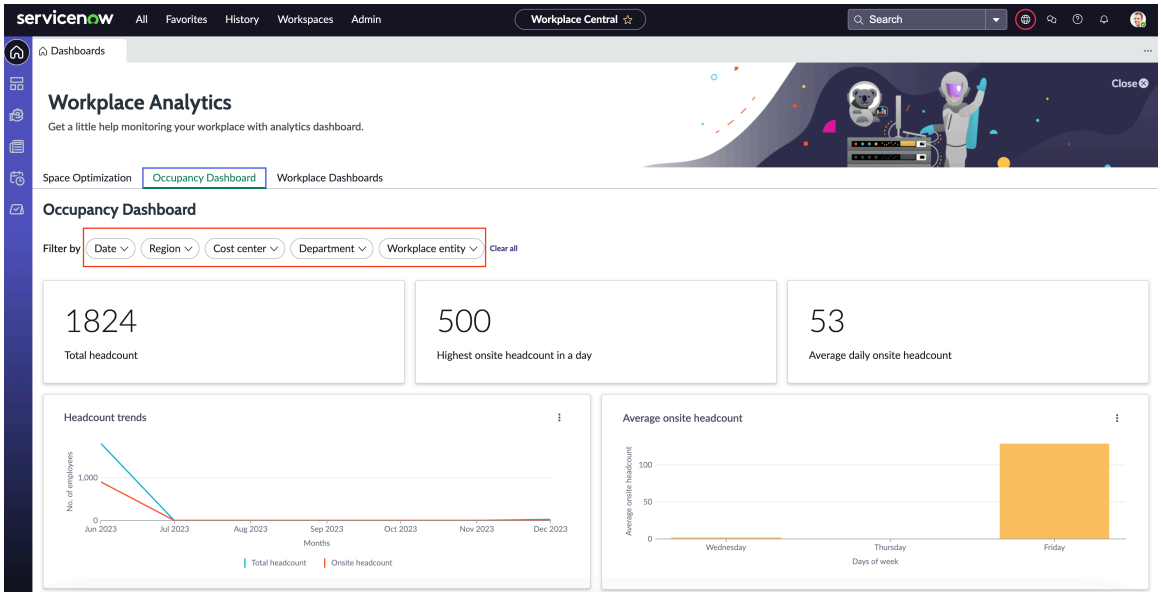
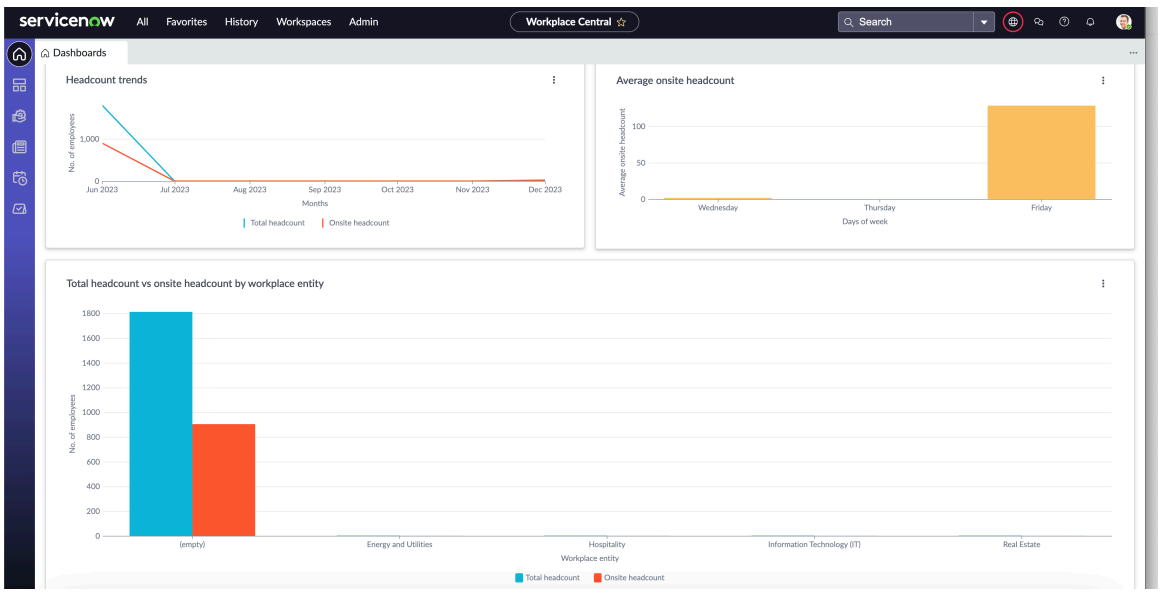


4. Select **Apply** after you've selected the required filters.
5. View the **Total headcount**, **Highest onsite headcount in a day**, and **Average daily onsite headcount** for a selected region, date, and cost center or department.
6. View occupancy reports based on the following criteria:
   - Headcount Trends
   - Available onsite headcount
   - Total headcount vs online headcount by department
   - Total headcount vs onsite headcount by workplace entity

   Filter by workplace entity to view space allocations of a building based on workplace entities. Workplace entity-based allocation, enables you to control the space consumption of each business in your organization. For more information, see Map designated workspaces to user profiles and Attendance Analytics.



7. The following default scorecards are available on the dashboard:

   Select a scorecard to see detailed reports and metrics:

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- Total headcount
- Highest onsite headcount in a day
- Average daily onsite headcount

8. Select an object on the chart to open the related component page.
   For example, select **Headcount trends** on the chart to open the Headcount trends page. The headcount for a selected region, site, campus, building, cost center, or department is shown.
9. Select **Export** to export occupancy dashboard data to Excel, JSON, CSV, or a PDF file.
10. After exporting the data, download or email the data.

View Lease Administration metrics

Use the Lease Administration dashboard to get insight into the number of total contracts, active contracts, draft contracts, and expiring contracts.

Prerequisites for accessing the Lease Administration dashboard

- Ensure that the Workplace Central application is installed. For more information, see Install Workplace Central
- Ensure that the Workplace Lease Administration (sn_wsd_la) application is installed. For more information, see Activate Workplace Lease Administration
- Ensure that the Workplace Central and Workplace Lease Administration applications and all of their associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Accessing the dashboard

To access the Lease Administration dashboard, you must have the sn_wsd_la.manager or sn_wsd_la.admin role.

- Access the dashboard using one of the following navigation paths:
  - **All** > **Workplace Central** > **Workplace Central**.
  - **Workspaces** > **Workplace Central**
- Select the Lease Administration ( ) to open the Lease Administration home page.

Scorecards and report

Note: Workplace contracts without a location value aren't included in the total count.

The following default scorecards are available on the dashboard. Select the card to see the list of records.

- **All Contracts**- Displays the total number of workplace contracts.
- **Active Contracts** - Displays the number workplace contracts in an active state.
- **Draft Contracts** - Displays the number of workplace contracts in the Draft state.
- **Expiring in 60 days** - Displays the number of workplace contracts that expire within the next 60 days.

For more information, see Workplace Lease Administration.

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Reports

Lease expiration by region

Displays the number of workplace contracts expiring in different regions.

Benefits:

Displays a consolidated view of the number of workplace contracts expiring so you can renew them on time. For more information, see Renew workplace contract in Core UI.

View Maintenance Management metrics

Use the Maintenance Management dashboard to get an insight into maintenance cases, their trends, and maintenance plan compliance. These insights enable you to create an efficient maintenance plan to improve workflows and reduce maintenance activities and their related costs.

Prerequisites for accessing the View Maintenance Management dashboard

- Ensure that the Workplace Central application is installed. For more information, see Install Workplace Central
- Ensure that the Workplace Maintenance Management (sn_wsd_maintenance) application is installed. For more information, see Install Workplace Maintenance Management.
- Create and publish a maintenance plan. For more information, see Create and publish maintenance plans and Workplace maintenance cases.

  You can also create a maintenance plan record by using the Preventative Maintenance option on the Workplace central home page. Navigate to **All** > **Workplace Central**. Select the Preventative Maintenance icon ( ) on the context side bar to create a maintenance plan.
- Ensure that the plugin Performance Analytics (com.snc.pa) is installed and that you have the Performance Analytics premium entitlement. For more information, see Install Performance Analytics Content Pack for Agile 2.0
- Ensure that the Workplace Central, Workplace Maintenance Management applications and all of their associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Run the *`Workplace Maintenance Case Historical Data Collection`* job before viewing the dashboard for the first time. For more information, see Run the scheduled job for the Maintenance Management dashboard.

Accessing the dashboard

To access the Maintenance Management dashboard, you must have the sn_wsd_maintenance.manager or sn_wsd_maint.admin role.

- Access the dashboard using one of the following navigation paths:
  - **All** > **Workplace Central** > **Workplace Central**.
  - **Workspaces** > **Workplace Central**
- Select the **Maintenance Management** tab.

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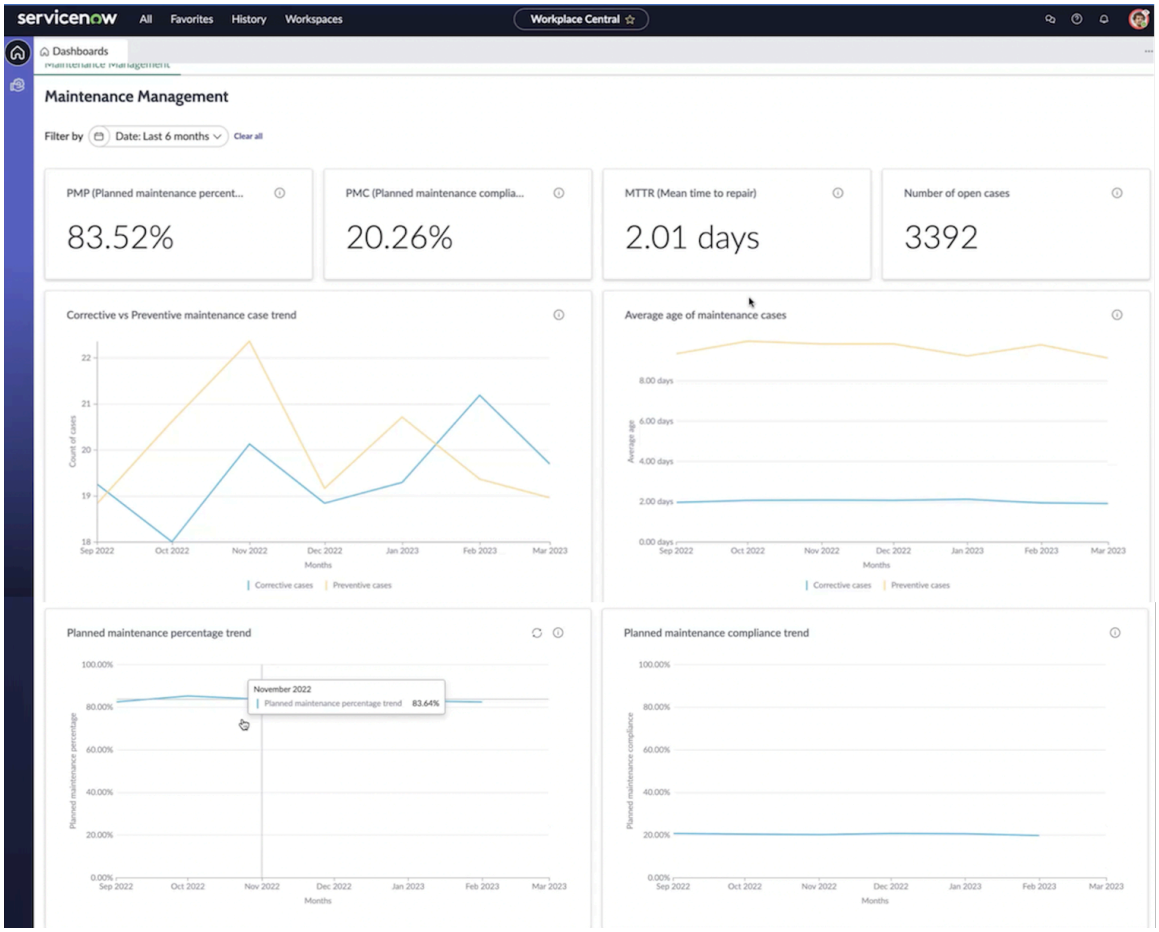

Scorecards

The following default scorecards are available on the dashboard. To see the list of records, select the related card.

PMP (Planned Maintenance Percentage)

Shows the percentage of planned days spent for preventive cases vs the total planned days for both preventive and corrective maintenance cases. A high percentage value indicates that more time is being spent in planned maintenance activities rather than unplanned activities.

Calculation:

```
Planned Maintenance Percentage = (Total number of days taken to complete all preventive maintenance cases for a duration / Total number of days taken to complete all maintenance cases for the duration) X 100
```

PMC (Planned Maintenance Compliance)

Shows the percentage of the total number of preventive maintenance cases completed vs the total number of preventive maintenance cases. A high percentage value indicates that maintenance activities are completed as per schedule.

Calculation:

```
Planned Maintenance Compliance = (Number of preventive maintenance cases completed/ Total preventive maintenance cases) X 100
```

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MTR (Mean time to repair)

Shows the average time taken to close a maintenance case. A low value indicates that the processes for maintenance and the necessary skills to handle them are effective.

Calculation:

```
Mean time to repair = Average age of all the maintenance cases / Total number of maintenance cases
```

Number of open cases

Shows the total number of open cases. A low number of open cases indicates your maintenance plan and resolution processes are effective.

Calculation:

```
Total number of preventive and corrective maintenance cases that are not in closed complete, closed incomplete, or canceled state.
```

Reports

The following default reports are available on the dashboard. Select the card to see the list of records.

Corrective vs preventive maintenance case trend

Displays the trend of corrective and preventive maintenance cases.

Benefits:

Analyze the trend to understand the efficiency of planning and identify any assets that must be retired or replaced.

Average age of maintenance cases

Displays the average age of corrective and preventive maintenance cases.

Benefits:

Analyze the trend to understand the efficiency of maintenance services and identify the process or assets that cause the increase in the age of maintenance cases. Take steps to reduce the age of cases.

Formula:

- `Average age of corrective maintenance cases = [Sum of ages for all the corrective cases/Total number or maintenance cases]`
- `Average age of preventive maintenance cases = [Sum of ages for all the preventive cases/Total number or maintenance cases]`

Planned maintenance percentage trend

Displays the percentage trend for the total number of days spent on preventive cases versus the total number of planned days for both preventive and corrective maintenance cases.

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Benefits:

Analyze the trend to identify problem areas that cause unplanned activities or corrective cases. Modify the process or replace or retire the assets to avoid unplanned activities.

Formula:

```
Planned maintenance percentage trend = (Total number of planned maintenance days / Total number of maintenance days) X 100
```

Planned Maintenance Compliance trend

Displays the percentage trend of the total number of preventive maintenance cases completed versus the total number of preventive maintenance cases.

Benefits:

Analyze the Planned Maintenance Compliance trend to identify issues that lead to deviation from the plan. Take steps to improve processes that causes inconsistent on-time completion.

Calculation:

```
Planned Maintenance Compliance trend = [Number of completed preventive maintenance cases/ Total preventive maintenance cases] X 100
```

Indicators

The indicator groups and indicators listed in the following table are used for populating the widgets in the dashboard.

Indicators and indicator groups

Indicator group name	Indicators
Workplace.Maintenance.Case.Closed	• Workplace Maintenance Case Closed Age Sum Hours • Workplace Maintenance Case Closed Corrective Age Sum Hours • Workplace Maintenance Case Closed Corrective Count • Workplace Maintenance Case Closed Preventive Age Sum Hours • Workplace Maintenance Case Closed Preventive Count
Workplace.Maintenance.Case.Opened	• Number of corrective cases • Number of open cases

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Indicators and indicator groups (continued)

Indicator group name	Indicators
	• Number of preventive cases • Workplace Maintenance Case Opened Preventive Closed Complete Count

You can also add new indicators. For more information on how to work with indicators, see Configure Performance Analytics fundamentals.

Run the scheduled job for the Maintenance Management dashboard

As an admin, run the scheduled job *Workplace Maintenance Case Historical Data Collection* to collect data for the past year that is used by the Maintenance Management dashboard.

Before you begin

Role required: admin

About this task

This job should be run before viewing the dashboard for the first time. It collects all the data required for the reports for the past year.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Job**.
2. Select **Workplace Maintenance Case Historical Data Collection** from the list.
3. Select **Execute Now** to run the job.

Manage Workplace Dashboards

Manage Workplace Dashboards in Workplace Central to get insights and metrics of Reservations, Visitors, Workplace Manager activities, Workplace Cases, and Synchronizations.

Before you begin

Role required: admin

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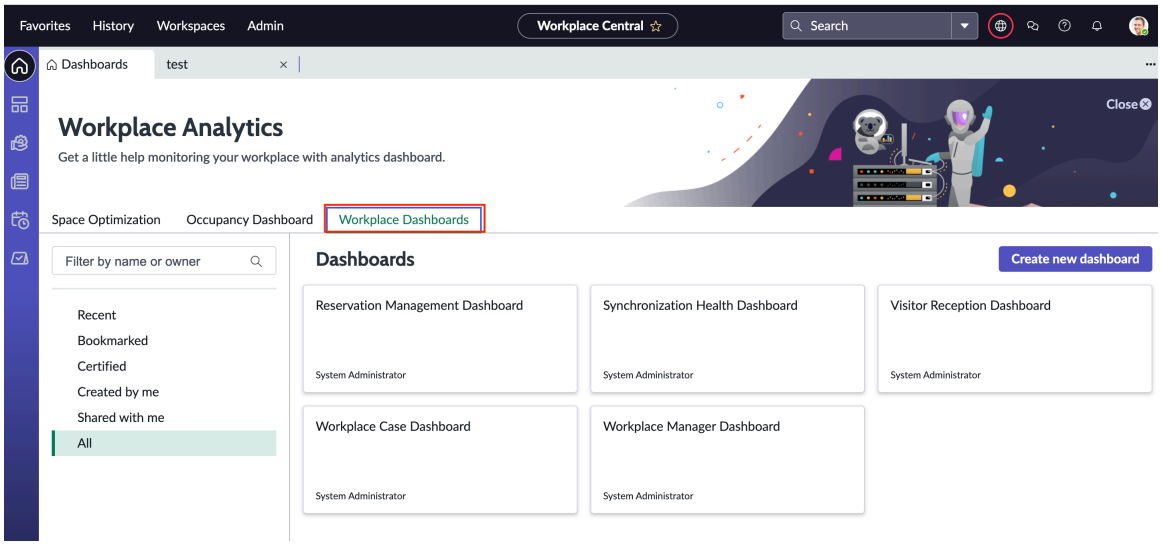
Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Dashboards**.



2. The following Workplace Dashboards are available:
   - Reservation Management dashboard
   - Visitor Reception Dashboard
   - Workplace Case dashboard
   - Workplace Manager Dashboard
   - Synchronization Health Dashboard

Reservation Management dashboard

Use the Reservation Management dashboard to monitor the reservations and meeting frequency in your organization. On any day, you can view details such as number of reservations, peak meeting times, and number of meetings for different locations.

Note: The Workplace Reservation Management dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central.

Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

For more information about the migrated dashboard, see Reservation Management dashboard.

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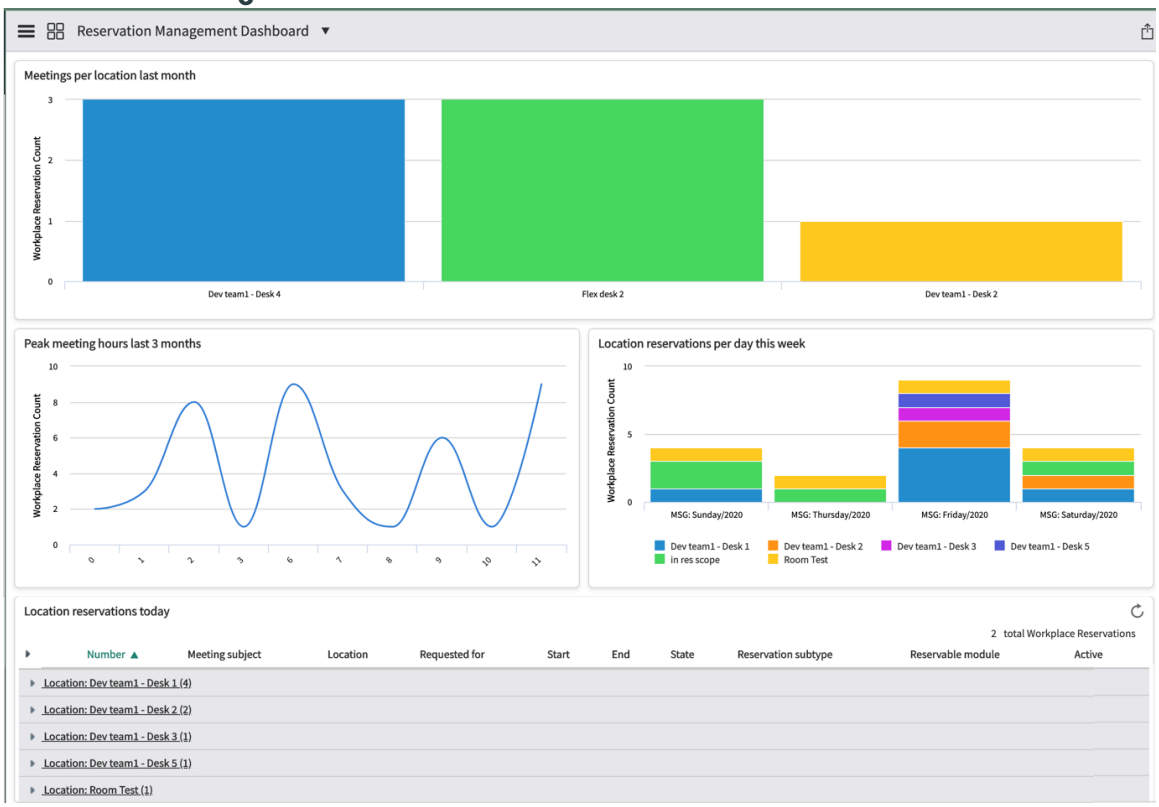
Reservation Management dashboard



To access the Reservation Management Dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards**.

End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace manager: Needs visibility into the real-time status and number of the reservations, most reserved locations, peak timings for meetings, and current day's reservations.	sn_wsd_rsv.manager	• Review current day's reservations • Monitor reservations created by employees • Monitor peak time when maximum meetings are organized • Monitor the number of meetings for each location

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Data visualizations

Data visualizations

Title	Type	Description
Meetings per location last month	Column 	Number of meetings scheduled in each location in the last month.
Peak meeting hours last 3 months	Line	Peak hours when the maximum number of meetings were scheduled in the last 3 months.
Location reservations per day this week	Stacked columns 	Number of reservations made each day for the current week.
Location reservations today	List	Number of reservations scheduled for today grouped by location.

Workplace Case dashboard

Use this dashboard to track the number of workplace cases that were created using the workplace services from the Workplace Service Delivery or from the Workplace Service Portal. Monitor the number of open cases, cases that require approval, and other cases on any given day.

The Workplace Case Management dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central. Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

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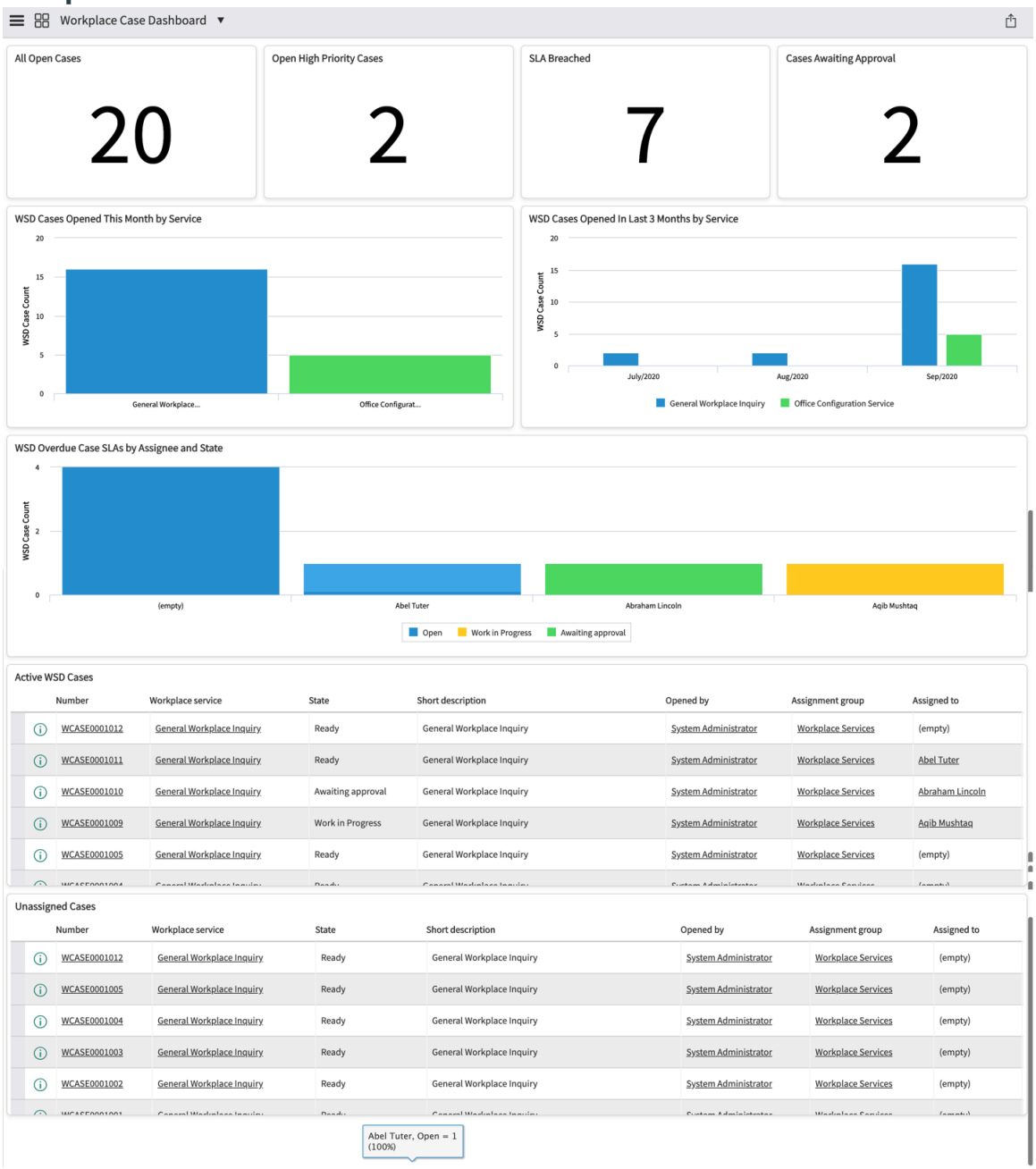
Workplace case dashboard



To access the Workplace Case dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards**.

End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace case manager: Needs visibility into the real-time status of workplace cases.	sn_wsd_case.manager	• Reviews all open cases • Monitors high priority cases

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End user and roles (continued)

End user and goal	Required role	Benefits
		• Monitors cases that have breached an SLA. • Monitors number of cases awaiting approval.

Data visualizations

Data visualizations

Title	Type	Description
All Open cases	Single score	Number of open workplace cases.
Open High Priority Cases	Single score	Number of high priorities workplace cases that are open.
SLA Breached	Single score	Number of workplace cases that breached SLA.
Cases Awaiting Approval	Single score	Number of workplace cases awaiting approval.
WSD Cases Opened This Month by Service	Column	Number of workplace cases created using the associated workplace services.
WSD Cases Opened in Last 3 Months by Service	Column	Number of workplace cases created in the last three months using the associated workplace services.
WSD Overdue Case SLAs by Assignee and State	Column	Number of workplace cases that have crossed the SLA deadline represented with respected to the assignee.
Active WSD Cases	List	List of active workplace cases on the current day.
Unassigned Cases	List	List of unassigned workplace cases on the current day.

Visitor Reception Dashboard

With the Visitor Reception Dashboard, you can track visitor registrations created in the application on any day. Track the statuses of visitors who are on the premises. View the number of visitors who are expected, have checked in, have checked out, are on break, or have not showed up.

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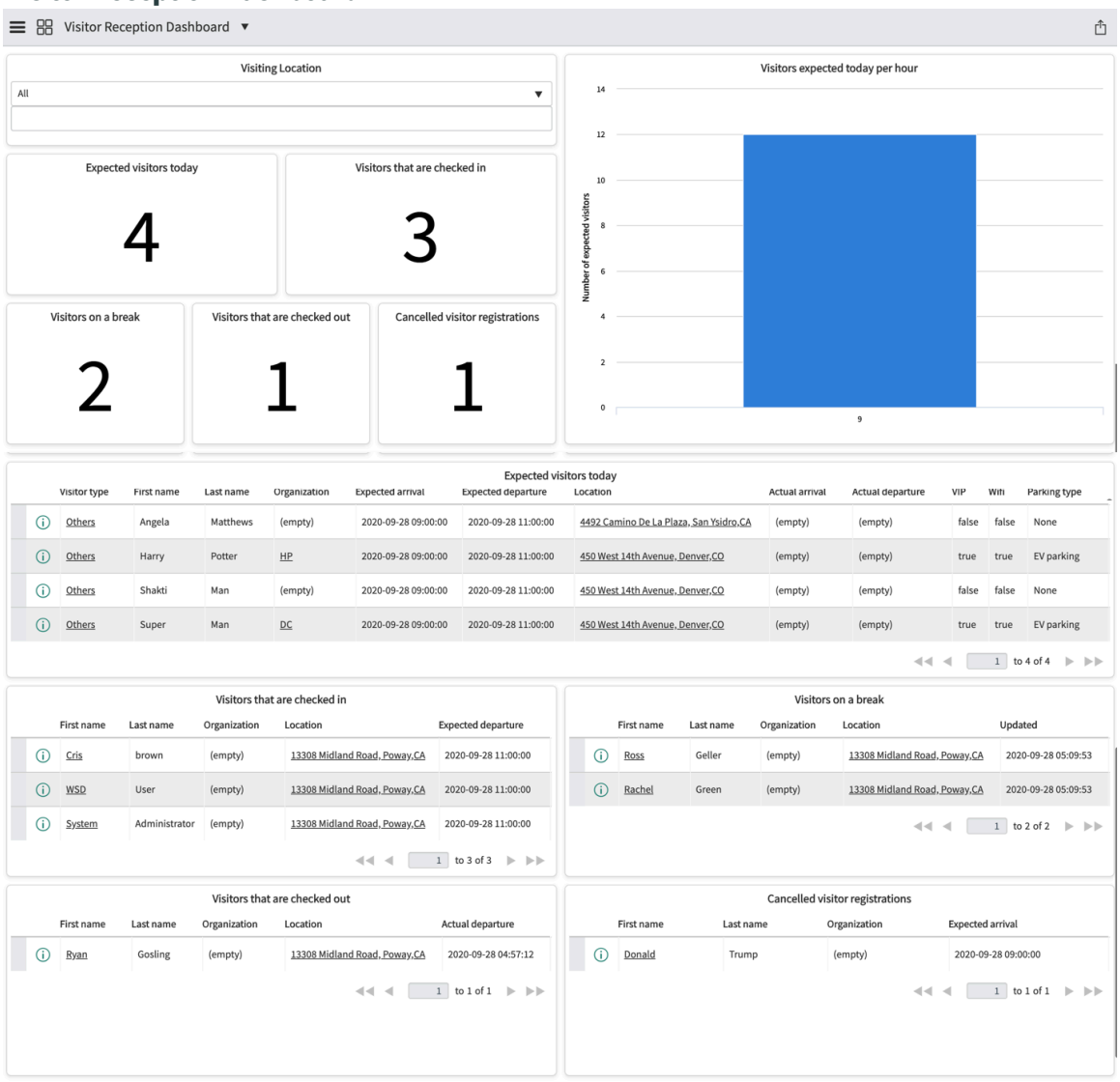
Note: The Workplace Visitor Management dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central. Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

For more information about the migrated dashboard, see Reservation Management dashboard.

Visitor Reception Dashboard



To access the Visitor Reception Dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards** .

Select a location in the **Visiting Location** field at the top to display reports for that location in separate tabs.

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End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace Visitor Management manager: Needs visibility into the real-time status and the number of the visitor registrations created.	sn_wsd_visitor.manager	• Review current day's visitor registrations • Monitor visitor registrations created by employees. • Monitor visitors who are currently checked in and the visitors who have checked out. • Monitor visitors who are on break. • Monitor expected visitors on the current day and at any hour. • Check cancelled registrations. • Check visitor's who did not show up.

Data visualizations

The Visitor reception dashboard allows you to view the following visualizations.

Data visualizations

Title	Type	Description
Expected visitors today	Single score	Number of expected visitors on the current day.
Visitors that are checked in	Single score	Number of visitors who are currently checked.
Visitors on break	Single score	Number of visitors who are currently on break.
Visitors that are checked out	Single score	Number of visitors who have checked out on the current day.
Cancelled visitor registrations	Single score	Number of cancelled visitor registrations.
Visitors expected today per hour	Column	Number of visitors expected at any hour on the current day. It shows the trend of the day according to when visitors are expected.

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Data visualizations (continued)

Title	Type	Description
Expected visitors today	List	Visitor registrations of the expected visitors on the current day.
Visitors that are checked in	List	Visitor registrations of the visitors who are currently checked in.
Visitors on break	List	Visitor registrations of the visitors who are currently on break.
Visitors that are checked out	List	Visitor registrations of the visitors who have checked out.
Cancelled visitor registrations	List	Cancelled visitor registrations.

Synchronization Health Dashboard

Use this dashboard to track the reservation synchronization. Monitor number of events and calendar items created in the application and other details related to them.

Note: The Workplace Calendar Synchronization dashboard is migrated to Workplace Central. You can start using the migrated dashboards from Workplace Central. The out-of-the-box dashboards are also migrated to Workplace Central. Old dashboards are not supported for new Workplace Service Delivery customers. For existing customers, old dashboards are currently available but will be deprecated soon.

For more information about the migrated dashboard, see Reservation Management dashboard.

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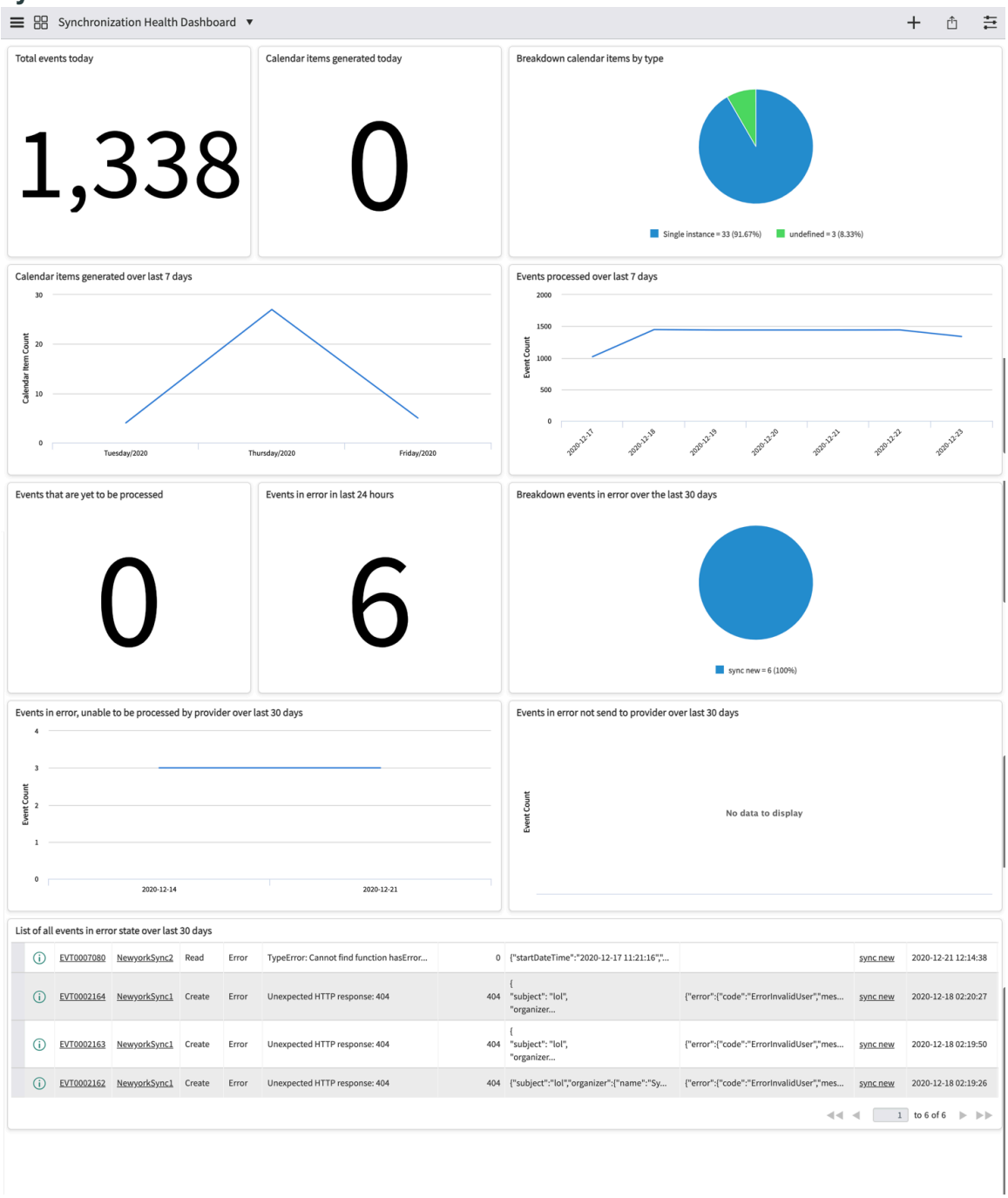
Synchronization health dashboard



To access the Synchronization health dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards** .

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End user and roles

End user goal and role

End user and goal	Required role	Benefits
System administrator and Workplace Calendar Synchronization admin: Needs visibility into the real-time status of the events and calendar items created in the application.	sn_wsd_rsvsync.admin	• View Connection configuration. • View Calendar providers. • Create, manage, and edit a Reservable Sync Configuration.

Data visualizations

Data visualization types

Title	Type	Description
Total events today	Single score	Number of events created on the current day.
Calendar items generated today	Single score	Number of calendar items generated in the current day.
Breakdown calendar items by type	Pie breakdown	Breakdown of the calendar items based on their type
Calendar items generated over last 7 days	Step time series	Number of calendar items generated in the last 7 days.
Events processed over last 7 days	Step time series	Number of events processed in the last 7 days.
Events that are yet to be processed	Single score	Number of events that are yet to be processed.
Events in error in last 24 hours	Single score	Number of events generated with errors in the last 24 hours.
Breakdown events in error over the last 30 days	Pie breakdown	Breakdown of events generated with errors over the last 30 days.
Events in error, unable to be processed by provider over last 30 days	Step time series	Number of events generated with errors that could not be processed by provider over the last 30 days.
Events in error not sent to provider over last 30 days	Step time series	Number of events generated with errors that were not sent to the provider over the last 30 days.
List of all events in error state over last 30 days	List	List of all the events that have been in the error state over the last 30 days.

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Workplace Manager Dashboard

Use the Workplace Manager dashboard to monitor the space allocation and workplace maintenance activities at your office campus. For any given day, you can view the details for available spaces, space reservations, pending workplace requests, arrival times for different locations, employee arrivals, and maintenance tasks.

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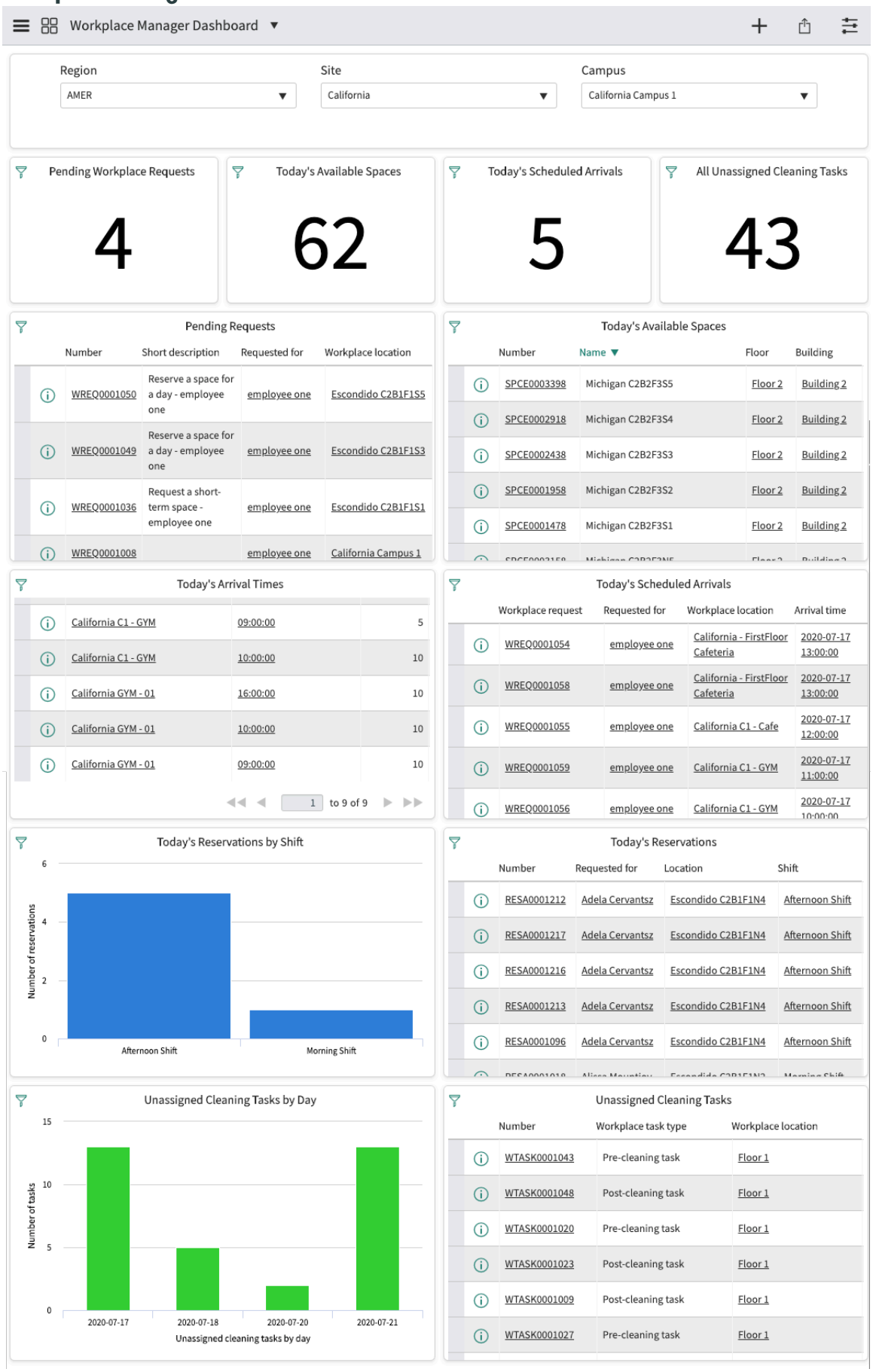
Workplace manager dashboard



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To access the Workplace Manager Dashboard, navigate to **All** > **Workplace Central** > **Workplace Dashboards**.

Selecting a region, site, and a campus in the Workplace Report Filter at the top of the dashboard displays reports for that campus.

End user and roles

End user and roles

End user and goal	Required role	Benefits
Workplace manager: Needs visibility into the real-time status of the workplace space availability, scheduled arrivals, and workplace maintenance.	sn_wsd_core.workplace_manager	• Review pending workplace requests • Monitor workplace reservation requests created by employees • Monitor arrival times • Estimate employee gatherings at common workplace locations using scheduled arrivals • Monitor the progress of workplace tasks

Data visualizations

Data visualizations

Title	Type	Description
Pending workplace requests	Single score	Number of workplace requests that are pending.
Today's available spaces	Single score	Number of active workspaces available for reservations today.
Today's scheduled arrivals	Single score	Number of employee arrivals scheduled for today for different locations on the campus.
All unassigned cleaning tasks	Single score	Number of active workplace tasks that are not assigned to anyone and not in the Closed state.
Pending requests	List	List of pending workplace requests for this campus.
Today's available spaces	List	List of active workspaces available for reservations today.

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Data visualizations (continued)

Title	Type	Description
Today's arrival times	List	List of arrival times scheduled for today for different locations on the campus.
Today's scheduled arrivals	List	List of employee arrivals scheduled for today for different locations on the campus.
Today's reservations by shift	Bar 	Number of workplace reservations for today grouped by their shifts.
Today's reservations	List	Number of workplace reservations for today.
Unassigned cleaning tasks by day	Trend 	Trend of the number of active cleaning tasks per day that are not assigned to anyone and not in the Closed state. The cleaning tasks in this report have a due date between today and the next seven days and include all task types such as planned, unplanned, and ad hoc.
Unassigned cleaning tasks	List	List of active workplace tasks that are not assigned to anyone and not in the Closed state.

Working with Move management

Create, monitor, and work on move projects created to schedule move requests. Work on the project using the move scheduling feature and monitor multiple move requests simultaneously.

Note: To access the Move Management module in Workplace Central, you must have the sn_wsd_move.manager role.

Create a move project from existing move requests

As a move manager, create a move project to logically group move requests based on different criteria and fulfill them on priority.

Before you begin

Ensure that you have the following plugins installed:

- Workplace Central
- Workplace Move Management

Role required: sn_wsd_move.manager

About this task

Create a move project to group multiple move requests into a single project to oversee and manage them. Specify conditions based on which the move requests must be filtered to group

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them under the project. You can set conditions to group workplace move requests based on their workplace location, building, space type, assignment group, department, and more. Provide a name and give a short description to the project.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
2. Select the Move management () module.
3. Select **Create project**.
   You can also create a move project from the following locations:
   - Select **My active projects** tile and select **Create** in the list view.
   - In the **All move projects** section, select **View all**. In the list view, select **Create**.
   - You can also create a move project when you deploy a scenario. After you select the **Deploy** action, in the dialog box, select **Create move project**.

     Important: The option is displayed only if there are any workplace user or workplace location moves in the scenario.
4. On the Create a move project form, specify a name and short description for the project.
5. Select **Select from existing move requests**.
6. In the **Editor** section, specify your conditions.
   By default, the project is created with Project and Active conditions that you can't remove.
   a. To add a condition, select **+New condition set**.
   b. Set a condition based on which you want to filter move requests to this project.
7. Create the project by selecting **Create**.

Result

The move project is created and all the move requests that have matched the filter conditions that you specified are displayed in the move scheduler. The move requests are displayed to you in the schedule view by default. The planned start and end date of the project are set based on the minimum **Expected start** date and the maximum **Due date** from the move requests that are associated with the project.

A move project contains both the schedule view and a list view. For more information on Move projects, refer to Move project views, actions, and states.

What to do next

Work on a move project.

Create a move project by uploading an Excel file

As a move manager, create a move project by uploading an Excel file that contains move-related information for the employees.

Before you begin

Verify that you have the following plugins installed:

- Workplace Central
- Workplace Move Management

Role required: sn_wsd_move.manager

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Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center by navigating to **Workspaces** > **Workplace Central**.
2. Select the Move management () module.
3. Select **Create project**.
   You can also create a move project from the following locations:
   - Select **My active projects** tile and select **Create** in the list view.
   - In the **All move projects** section, select **View all**. In the list view, select **Create**.
   - You can also create a move project while deploying a scenario. After you select the **Deploy** action, in the dialog box, select **Create move project**.

     Important: The option is displayed only if there are any workplace user or workplace location moves in the scenario.
4. On the Create a move project form, specify a name and short description for the project.
5. Select **Create move cases via excel upload**, then select **Create**.
   You can download the Excel template required to create the move project by selecting the **Download excel template** link.
6. Upload an Excel file that contains move-related information.
   The file must contain move-related information in the appropriate columns. The maximum supported file size is 10 MB.

   You can download an Excel template by selecting **Download standard excel template**. For more information about the character limit of the Excel columns, see Excel column lengths for move projects.

   Note: If you have an existing file, you must delete it to upload a different file. You can delete the file by using the context menu.

   a. In the **Attachments** section, select **Attach file**.

   b. From your local system, select the file that you want to upload.

   c. On the **Upload a file** pop-up, select **Upload**.
   You can edit the name of the uploaded file based on your preference.

   d. After the file is uploaded, select **Next**.

   The system takes some time to process the uploaded file and loads the data in a staging table. After the move information is processed, the system displays information about data issues and business conflicts.

   Important: Data stored in the Move staging table (to process data issues or conflicts) is archived after seven days. Make sure that you create move cases before the data is archived.
7. On the `Fix data issues` page, review the information and resolve the conflicts.

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Conflicts like non-existent employee or same source and destination are stored as data issues. You must resolve the issues or remove the conflicted records to continue. For more information about data issues, see Move conflicts for projects created via Excel upload.

a. Perform any of the following actions based on your requirement.

- You can delete records by selecting the check boxes, then selecting **Delete**.
- You can edit a record by selecting the edit icon ( ) for the record.
- You can edit multiple records by selecting the check boxes, then selecting **Edit**.

b. After resolving the conflicts, select **Reprocess and continue**.
The system reprocesses the records and displays any remaining data conflicts. Repeat the steps to resolve all the conflicts.

If all the conflicts are resolved, the system proceeds to the `Review conflicts` step.

8. On the `Review conflicts` page, review the information and resolve the conflicts.
Conflicts like allocation mismatch or exceeding capacity are shown as business conflicts. For more information about the conflicts, see Move conflicts for projects created via Excel upload.

Note: You can ignore the conflicts and continue by selecting **Next**.

a. Optional: Perform any of the following actions based on your requirement.

- **Edit**: You can edit the move information in the move information table to fix data issues or resolve business conflicts.
- **Ignore**: You can ignore the conflict and resolve it after the move cases are created.
- **Remove**: You can remove the move information record from the move information table. Move cases aren't created for removed records.

b. After making the changes, select **Next**.

9. Create the move cases by selecting **Create move cases**.
You can go back and edit records in the conflicts table before creating the move cases.
The system takes some time to create move cases based on the move information records.
You can view the progress by opening the move project.

Trouble?
If you accidentally close a move project after uploading an Excel file, the system displays a loading screen when the move project is opened. To close the loading screen and edit the project, select **Edit Move Project**.

What to do next

- Review the created cases on the **Move cases** tab:
  - The **List** view displays details like the status and move dates for the cases.
  - The **Calendar** view displays the planned move dates for the move cases. You can schedule the cases by moving them on the calendar.
- Review the move tasks that are created for the move cases. The **Move tasks** tab displays details like the priority and status of the move tasks.
- View the project details, comments, work notes, and activity on the **Move project details** tab.

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Note: The move project isn't marked complete even if all the child cases are closed. You can add more cases to the project from the Schedule View or the List View.

For more information about working on a move project, see Work on a move project.

Work on a move project

After creating a move project, work on the project using the move scheduler. The move scheduler displays all the move requests in a schedule view (calendar view) and a list view. Track all the move requests that are grouped under the move project.

Before you begin

Ensure that you have created a move project, and it's active. For more information about creating a move project, see either of the following topics:

- Create a move project from existing move requests
- Create a move project by uploading an Excel file

Ensure that you're aware of the Move project views, actions, and states.

Role required: sn_wsd_move.manager

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
2. Select the Move management ( ) module.
3. In the **Move management** metrics section, select the **My active projects** tile.
4. From the list view, select the project that you want to work on.
   The project opens in a separate move scheduler tab with a calendar view.
5. View the users who raised the move requests by viewing the Move requests panel on the left. Scroll through the list to view all the users. The move requests are sorted based on their move request number.
6. View the planed start and end dates on the calendar by scrolling horizontally on the calendar.

   Important: Move requests that are in the Unplanned state aren't displayed with a bar. As a move manager, you must specify the planned start and end date to the move requests.

7. View the previous week or next week by using the **Previous week/ next week** options ( ) placed on the top left of the calendar.
8. Change the calendar view from week to month by using the **Week/Month** option ( ).

   Important: You can't move a move request bar in the **Month** view.

9. View the keyboard shortcuts by selecting the Settings icon ( ).
10. View details of a move request by selecting the event/bar on the calendar.
    The move request details are displayed on the right in the Case details panel. To view more case details such as its child tasks, case SLAs, and more, select **Open case details**.
11. Update the move request details.

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a. In the Case details panel, edit the fields that you want to change.

b. Select **Update**.

c. **Optional:** To view or update other case details such as the child cases, child tasks, approvers, case SLAs and more, select **Open case details**.
The move request opens in a separate tab.

i. Edit the fields that you want to change.

ii. Select **Save**.

12. Schedule a move request to another day.

a. Select the move request bar on the calendar.

b. Drag the request to the desired date.

Note:

- You can drag the request only horizontally, that is, to another day on the calendar.
- You can't drag the request to another user.
- You can't drag a request if you are in the **Month** view.

c. Select **Save**.

13. Change the planned start and planned end dates of the move request.

a. Select the move request bar on the calendar.

b. In the **Case details** panel, edit the following fields:

- **Expected start**: Edit this field to change the expected start of the move request. That is, select the date from when you're planning to start the move.
- **Due date**: Edit this field to change the due date of the move request. That is, select the date by when you want to close the move request.

14. Switch to a list view of the move requests by selecting the List option (≡ List).

15. Remove a request or assign a move request to yourself.

a. Select the List option (≡ List) to open the move requests in a list view.

b. To remove a request, do the following:

i. Select the move requests that you want to remove.

ii. Select **Remove**.

c. To assign a move request to yourself, do the following:

i. Select the move requests that you want to assign to yourself.

ii. Select **Edit**.

iii. Select **Assign to me**.

16. **Optional:** Create move tasks for multiple move requests from the list view.

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a. Select the requests that you want to create tasks for.

b. Select **Add tasks**.

c. On the pop-up form, select a Workplace task type, Workplace location, and Workplace service activity.

d. In the Short description field, enter information about the task.

e. Select an assignment group, then assign the task to a member of the assignment group.

f. Select the priority for the task, then select **Create**.

17. Add more move requests.

    a. Select **Add new requests**.
    A separate tab opens with a list of move requests that aren't assigned to any move project.

    b. Select the move requests that you want to add.

    c. Select **Add**.

18. To view the move project details, to change the state of the project, to assign the project to another move manager, to know the project's state transition, the actual start, and end dates and more, do the following:

    a. Select the **Move project details** tab.

    b. **Optional:** To change the state, edit the **State** field.
    Before changing the states, refer to Move project views, actions, and states.

    c. **Optional:** Assign the project to another move manager by changing the **Assigned to** field.

    d. **Optional:** Add work notes.

        i. Go to the **Compose** panel.

        ii. Enter your work notes.

        iii. Select **Post work notes(private)**.

        iv. Select **Save**.

    e. **Optional:** Add or view attachments of the projects by selecting the Attachments icon (.

    f. Select **Save**.

19. Select **Save**.

20. Delete the move project:

> ⚠ **Warning:** Deleting a project doesn't delete or impact the associated move requests. After deletion, the move request will continue to exist in its current state without any project association.

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a. Select More actions icon ( ).

b. Select **Delete**.

c. Select **OK**.

Result
The changes are saved on the move project.

Working with Event planner

Monitor all the reservations created in your organization from a single workspace. Create a reservation, open a reservation, schedule a reservation to another time or move to another location. Open the Location directory portal from the Event planner home and the Scheduled view.

Track reservations using the Event planner

As a reservation planner and a reservation viewer, the Event planner enables you to monitor the reservations that are requested in your workplace.

Before you begin
Ensure that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

Role required: sn_wsd_rsv.reservation_planner or sn_wsd_rsv.reservation_viewer

About this task
Check the number of reservations that are planned for the current day and if there are any extra services. The event planner also displays the reservations that are canceled for today and the reservations that are yet to be approved. The reservations are displayed with the following details by default:

- Requester of the reservation
- Location that is reserved
- Building and campus of the location
- Start and end time of the reservation
- Current state of the reservation
- Type of reservation

You can edit the columns to display the information according to your requirement.

You can view all the reservations that are currently active and also the reservations that are created by you or requested for you.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Event planner** icon ( ).
   The Event Planner dashboard opens.
3. To view the current days reservation statues, do the following:

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a. Go to the **Reservations** metrics section.

b. Select one of the following tiles to view as a list:

- **Planned reservations for today**
- **Reservations with extra services for today**
- **Canceled reservations of today**
- **Pending approval reservations**

4. To view the active reservations, do one of the following:
   - To view all the reservations, go to the **All Reservations** section.
   - To view the reservation created by you or for you, go to the **My reservations** section.

   To view more reservations, select **View all**.
5. To edit the columns of the list view, do the following:

   a. Select the List actions icon ().

   b. Select **Edit columns**.

   c. After you add the columns that you want to view, select **OK**.
6. **Optional:** To refresh the list, select the Refresh icon ().
7. **Optional:** To apply a filter on the list, select the Show filter icon ().
8. To view all the reservations created in the workplace in a schedule view, select **Open schedule view**.

View reservation details in the event planner

Check details of a reservation created in your workplace.

Before you begin

Ensure that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

Role required: sn_wsd_rsv.reservation_planner or sn_wsd_rsv.reservation_viewer

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Event planner** icon ().
   The Event Planner dashboard opens.
3. To view the current days reservation statues, do the following:

   a. Go to the **Reservations** metrics section.

   b. Select one of the following tiles to view as a list:

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- **Planned reservations for today**
- **Reservations with extra services for today**
- **Canceled reservations of today**
- **Pending approval reservations**

4. To view the active reservations, do one of the following:
   - To view all the reservations, go to the **All Reservations** section.
   - To view the reservation created by you or for you, go to the **My reservations** section.

   To view more reservations, select **View all**.
5. Select the reservation that you want to view.
   The reservation opens in a new tab. The details of the reservation are displayed.
6. Select any of the following tabs based on the details that you want to view:
   - **Blocker Reservations**: To view the blocker reservations created before and after the reservations. This tab appears only if there are any extra services requested.
   - **Cases**: To view the workplace cases created for the extra services requested in the reservation.
   - **Tasks**: To view the workplace tasks created to fulfill the extra services requested in the reservation.
   - **Requested Service**: To view the services requested with the reservation.
   - **Approvers**: Approver of the reservation.
   - **Invitees**: Invitees invited to the reservation.
   - **Reservation Recordings**: Recordings of the reservation if a virtual meeting link was included.
7. To open the reservation on the portal, select **Open reservation**.
   The reservation opens on the Employee Center portal.

What to do next
If you want to edit the reservation, refer to Edit a reservation using the event planner.

Edit a reservation using the event planner

As a reservation planner, edit a reservation directly using the event planner.

Before you begin
You can also manage a reservation using the schedule view. Using the schedule view, you can edit the start and end time, or to move the reservation to another location. For more information, refer to Working with schedule view.

Ensure that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

Important: Using the schedule view, you cannot edit a multi-child or a group-child reservation that is created using a calendar provider. Reservations created using a calendar provider can only be managed using the calendar provider.

Role required: sn_wsd_rsv.reservation_planner

About this task
As a reservation planner, you can perform the following actions:

- Drag a reservation to another date and time to reschedule.
- Change the reservation timings,

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- Change the location of the reservation.
- Cancel a reservation
- Open a reservation and make advanced changes and also add services.

To manage a multi-location or a group reservation, you must open the reservation details and make changes.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Event planner** icon ().
   The Event Planner dashboard opens.
3. To view the current days reservation statues, do the following:

   a. Go to the **Reservations** metrics section.

   b. Select one of the following tiles to view as a list:
      - **Planned reservations for today**
      - **Reservations with extra services for today**
      - **Canceled reservations of today**
      - **Pending approval reservations**

4. To view the active reservations, do one of the following:
   - To view all the reservations, go to the **All Reservations** section.
   - To view the reservation created by you or for you, go to the **My reservations** section.

   To view more reservations, select **View all**.
5. Select the reservation that you want to edit.
   The reservation opens in a new tab. The details of the reservation are displayed in the **Details** tab.
6. In the **Details** tab, edit one of the following fields depending on the changes:
   - **Number of attendees**
   - **Reservation purpose**
   - **Cost center**
7. To edit the workplace case created for the extra services, select the **Cases** tab.
8. After making the changes, select **Save**.

Result

The changes are saved. To change the reservation timings or change the location, refer to Working with schedule view.

Working with schedule view

You can check any reservations created in your workplace and also make changes using the schedule view of the event planner.

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Before you begin

Ensure that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

Important: Reservations created using a calendar provider can only be managed using the calendar provider.

Role required: sn_wsd_rsv.reservation_planner or sn_wsd_rsv.reservation_viewer

About this task

Using the Event planner Schedule view, do the following:

- You can only manage reservations created using the Workplace Reservation Management applications.
- Manage single and multi-day reservations.
- You can manage or update a reservation only by opening a reservation on the reservation portal page and not using the Schedule view.

You can view reservations created in any campus, building, or floor of your organization using the schedule view. The schedule view provides a clear calendar-based view of the reservations and the reserved spaces. It displays all the reservations created on a space for a single day or a week (multi-day) depending on the reservation timeline.

- You can filter reservations by space types and locations.
- View reservations requested for present and past dates.
- View current day's reservations requested for a selected building.
- As a reservation or space planner, do the following:
  - Drag a reservation to another space for a selected campus and building. Update date and time as required.
  - Cancel a reservation.
  - Open an existing reservation on the reservation portal. Update the reservation start date and end date, time, or location on the Workplace Reservation Management portal.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Event planner** icon ().
   The Event Planner dashboard opens.
3. Select **Open schedule view**.
   A schedule view opens displaying all the locations of your organization. If your had already applied a location filter on the schedule view in the past, the filter is retained and the locations are displayed accordingly.
4. To search for a space directly, specify the space name in the **Search spaces** search bar on the top left.
5. Select a date to view the reservation details.
6. To view reservations for a date and time, do the following:
   The calendar displays the time based on the time zone of the selected campus.

   a. Select the **Date**.
      The date field is displayed directly with the current date selection.

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b. On the calendar, select the date that you want to view.
You can change the month and year if necessary.

c. Select **OK**.

The reservations created for a selected date are shown.

7. Select a **Campus** from the Schedule view menu.
8. Select a **Building** and **Floor**.
By default, all the buildings and floors are displayed. From the building and floor drop-down list, deselect any buildings or floor that you don't require.
9. To filter the spaces based on their reservable purpose, select the **Reservable puposes** option and make a selection.
If a reservable purpose is not selected, then all the spaces including the ones that do not have any reservable purpose are displayed.
The spaces that match the selected purpose are displayed.
10. To change the time line of the calendar, use the time line option.
By default, the calendar is set to a 30-minute view, that is, the **Day view 30 minutes** option is selected.
11. To view reservation details, do the following:

a. Select a reservation.
The reservation details (start date and end date, time, reservation duration, type of reservation and current state is displayed.

b. To view and update the reservation details, select the Open side panel icon ( ).

c. To open the reservation on the portal and view more details, select **Open reservation**.

12. Udpate a reservation to another date, time, or location.

Note: You can perform this action only if you are a Reservation planner.

a. Select a reservation.

b. Drag the reservation to a desired time

Note: You cannot move the reservation to another date. You can only change the timings.

Important: Using the schedule view, you cannot edit a multi-child or a group-child reservation that is created using a calendar provider.

c. On the Confirm reservation changes window, review the changes to be implemented and select either **No, Cancel** or **Yes, Update**.

Note: If there are any extra service requests with the reservation, you will have to request them again after you move the reservations. When you move a reservation, the extra services are not moved.

13. To move the reservation to another location on a building or floor, do the following:

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Note: You can perform this action only if you are a Reservation planner.

a. Select the reservation.

b. Drag the reservation to the desired location.

c. On the Confirm reservation changes window, read the changes that will be implemented and select either **No, Cancel** or **Yes, Update**.

Important: If there are any extra service requests with the reservation, you will have to request them again after you move the reservations.

- After you move the reservation, you must request the extra services again. When you move a reservation, the extra services are not moved as the services vary for different locations.
- If you are moving a reservation requested by an employee, a notification is sent to the employee to confirm the action.
- To change the reservation and keep the services, edit the reservation first.

14. To create a reservation on the selected campus, select **Create new reservation**. For more information on how to make a reservation, refer to Create a reservation.

Allow Event planners to handle reservations with more flexibility

Reservation planners can bypass or overrule certain settings in the Reservable module while moving a reservation to another location in the Event planner Scheduled View.

Space planners with the (sn_wsd_rsv.reservation_planner) role can move a reservation when a location or space is part of a Reservable module. Space and reservation planners (sn_wsd_rsv.reservation_planner) with the dedicated role (sn_wsd_rsv.bypass_module_validation) can ignore or bypass certain settings in the Reservable module configuration. They can move and update a reservation from one Reservable module to another without the need to recreate a reservation. Space planners can bypass the Reservable module configuration limitations to optimize reservations quickly and easily.

For example, reservation planners or space planners can bypass the following settings in the Reservable module:

- Max days in the future
- Max number of occurrence
- Min and Max duration
- Available in
- All day

Space planners can do the following while moving a reservation in the Event planner:

- Move to different Reservable modules when a space is available in multiple Reservable modules.

Note: Space planners can't move a reservation from one space to another when there's no Reservable module associated with it.

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- Move shift-based reservations. Space planners can move a shift-based reservation to a location having the same-shift-based reservation module.

  Note: Space planners can't move a shift-based reservation to a different shift-based module. When a space is part of two different shift-based Reservable modules, only one of the shift-based Reservable module is available for selection while moving a reservation. Space planners can move a shift-based Reservable module to a non-shift based Reservable module. For example, **Desks within a Shift Reservable** module to **Desks** Reservable module.

Move reservations between Reservable modules using the Schedule view

Reservation or space planners can move or update reservation between Reservable modules. Planners with sn_wsd_rsv.bypass_module_validation role can bypass the Reservable module configuration settings.

Before you begin

Make sure that you have installed the following applications:

- Workplace Core
- Workplace Central
- Workplace Reservation Management
- Workplace Case Management

Role required: sn_wsd_rsv.reservation_planner

About this task

As a reservation or space planner, you can perform the following actions:

- Create a reservation from the Event Planner Scheduled view page.
- Drag and move a reservation to another location, date, and time.
- Change or update the reservation location, start and end dates, and time.
- Open a reservation from the Scheduled view page to update a reservation on the Workplace Reservation Management reservation portal page and add services to it.

Procedure

1. Navigate to **All** > **Workplace central** > **Workplace Central**.

   You can also open Workplace Central from Employee Center directly. Navigate to **All** > **Self-service** > **Employee Center** > **Workspaces** > **Workplace Central**.

2. Select the Event Planner icon ( ).
3. Select **Open Scheduled view**.

   Schedule view page opens. If you have already applied a location filter on the schedule view in the past, the filter is retained and the locations are displayed accordingly.

4. To search for reservations requested for a campus, building, or a floor, do the following:

   a. Select a **Campus** from the menu.

      The **Building** and **Floor** fields are automatically populated. By default, all the buildings and floors are displayed. The spaces in a campus are displayed based on the building and floor

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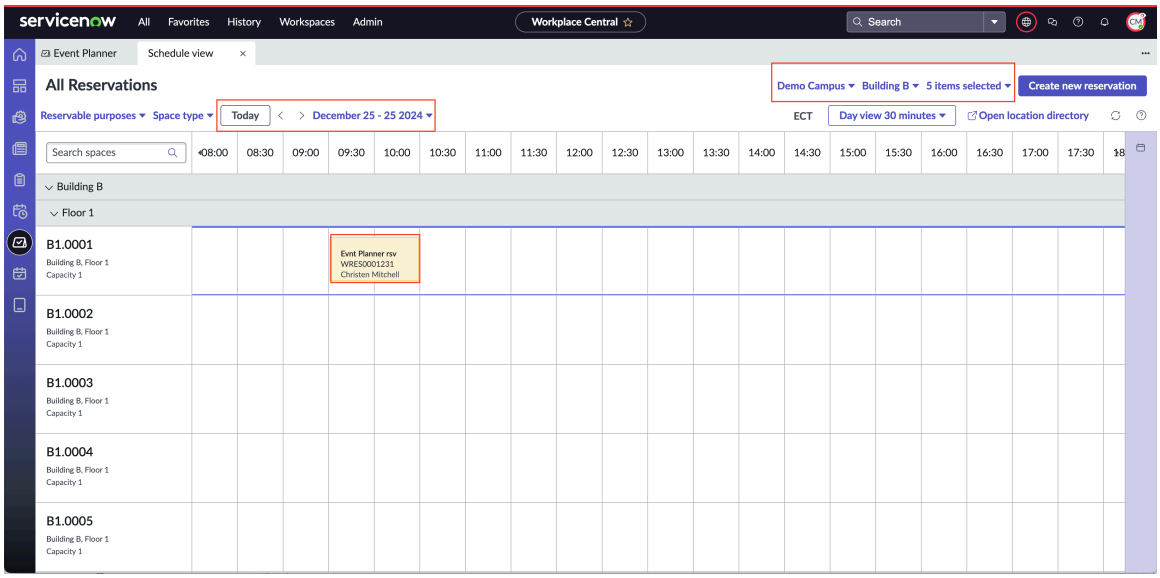
where it's located. Select a building, floor as required. You can clear or uncheck the buildings and floors that are selected by default in the drop-down list.

Space or reservation planners can change the Reservable module to a different Reservable module while moving or updating a reservation. Planners can search for spaces and select a new location.

b. To view a reservation for a specific date, do the following:



a. Select the date from the Date picker for which you want to view a reservation.

For example, December 24, 2024.

b. Change the month or year as required.

c. Select **OK**.

The reservations available for a selected date are displayed.

5. Select **Space type** to filter reservable locations based on space types.

For example, Gym, elevator, Meeting rooms, Desks/Meeting rooms, and so on.

Scheduled view displays only spaces of the selected type.

6. To create a reservation, select the **Create new Reservation** button from the Scheduled view menu.

The Make a reservation page opens on the reservation portal.

Note: Adding multiple spaces to a reservation isn't supported in Event Planner. Select only a single space while creating a reservation.

For more information, see Create a reservation.

While creating a reservation, space or reservation planners can bypass the start date or end date restrictions configured in the Reservable module:

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- Max days in the future

  For multi-day reservations, planners can select a time span exceeding the Reservable module configuration. For example, If Max days in future vale is 90, space planners can make a reservation exceeding the 90-day limit.

  Note: When synchronizing a reservation with the Microsoft Exchange Server, reservation dates too far in the future are rejected.

- Recurring

  For recurring reservation, planners can select a date past the **Max number of occurrences** value set in the Reservable module configuration.

7. To move the reservation from one Reservable module to another or within the same Reservable module, do the following:

   Note: Only one space or location can be selected while moving or updating a reservation from one location to another.

   a. Select the reservation that you want to update.

   b. Drag and move or drop the reservation to the desired location or space.

   For example: Select a reservation in Demo campus, First floor from Room B1-02 and move it to Room B2-02.

   Note: You can move a reservation from one location to another locations within the same Reservable module or it can be moved to a space or location with a different Reservable module. Workplace services added to a reservation remains intact when the services are available on the new space.

   c. The confirm reservation changes dialog box opens.

   d. Select the Reservable module to where you want to move your reservation.

   The list displays all the available Reservable modules to which the selected space or location belongs.

   While updating the reservation certain roles and limitations are ignored or bypassed for reservation or space planners (sn_wsd_rsv.reservation_planner) having the (sn_wsd_rsv.bypass_module_validation) role.

   - If a selected location or space is available in multiple Reservable modules, reservation or space planners can select the Reservable module from while updating a reservation. If a space is part of multiple Reservable modules, available Reservable modules are displayed in the list for selection. The Reservable modules are sorted alphabetically.

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Note: If the space is part of multiple Reservable modules, one of the eligible Reservable modules is preselected based on the space details algorithm. For example, if space Dublin is part of Reservable Module Desks and you want to move it to space Eureka which is also part of the same Reservable module (Desks), then Desks is preselected based on the space details logic. If you're moving a space to a location which is part of two different reservable modules then one of the Reservable modules is preselected based on the space details algorithm. For example, if you're moving Eureka to B1.003, and B1.003 is part of two Reservable modules (**Desks** and **Desks within an area**), one of these Reservable module is preselected based on the space details algorithm.

- If the space is part of multiple Reservable modules including the current module from which the event planner is moving a reservation to a different location, the current module is preselected. The reservation or space planner can select a new module from the list of presented modules as required.
- If a space is part of a single Reservable module, only that Reservable module is available for selection while updating a reservation from one location to another. The confirm Reservation changes dialog box doesn't show the drop-down list with multiple reservable modules and only one reservable module is shown for selection.

Note: If the selected space has no Reservable module, moving or updating a reservation to a new location isn't allowed. A message is displayed, "The target space has no module associated."

e. Select **Yes, update** to confirm your selection.

8. Select an existing shift-based reservation from the Scheduled view.

a. Select a reservation from a location and move or drag it to a desired location.
The confirm reservation changes dialog box opens.

b. Select a Reservable module to which you want to move the selected reservation and space.
While moving a shift-based reservation, the shift-based Reservable module of which the space is part of is preselected.

Note: You can move a location within the same shift-based reservation and not to a different shift-based reservation. Two different shifts aren't available for selection in the confirm reservation changes dialog box when you try to move a reservation. Space planners can move a shift-based reservation to a non-shift Reservable module (Desks, meeting rooms, and so on). For example: **Desks within a Shift** Reservable module can be moved to **Desks** Reservable Module. For more information, see Allow Event planners to handle reservations with more flexibility.

9. Optional: Select the Show reservation details icon ( ) to open the Reservation details side-panel context window.

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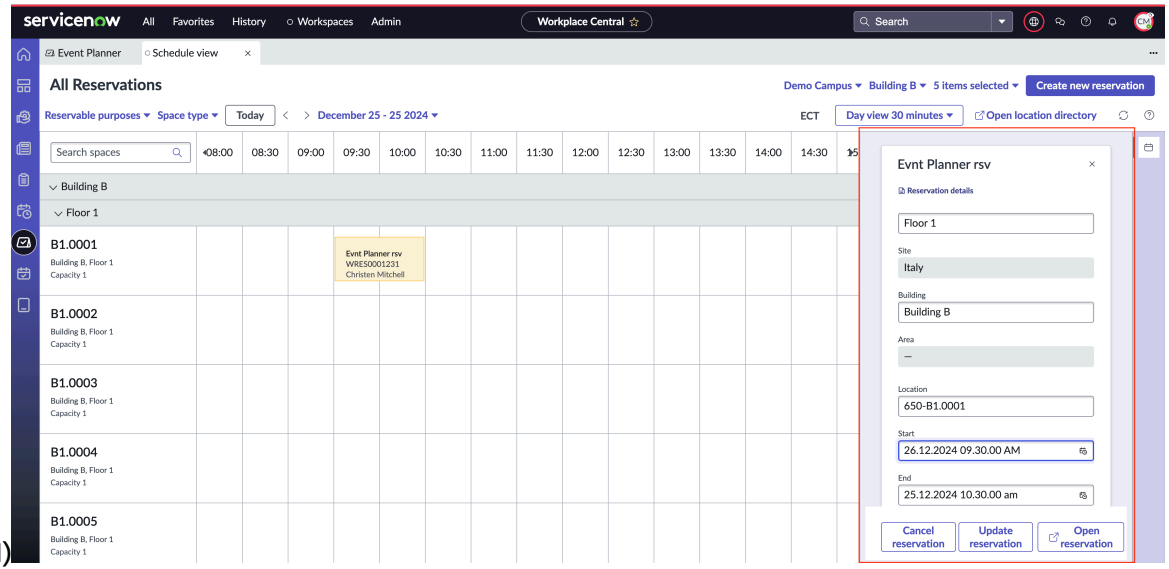
a. Select and select a reservation to open the reservation details information window.

i. Select **Open Reservation**. Your reservation opens in a new browser tab on the Employee Central portal page.

ii. (Optional) Select the **Actions** tab and select **Change Reservation details** to update the reservation.

b. Select an existing reservation on the Scheduled view to open and update the reservation using the contextual side panel.
Update the following field information:

(Optional)



- Floor
- Building
- Location
- Start Date
- End Date
- Requested for
- Reservation subject
- Additional message

For more information, see Create a reservation.

c. After making the required changes, select **Update reservation**.
The **Update reservation** button is activated when you edit or update changes in the Reservation details contextual-side panel.

Follow Step 7 to Step 8 as required.

Print reservation details

Print the details of a reservation created in your workplace.

Before you begin

Confirm that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

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Role required: sn_wsd_rsv.reservation_planner or sn_wsd_rsv.reservation_viewer

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly by navigating to **Workspaces** > **Workplace Central**.
2. On the Workplace Analytics dashboard, select the Event planner icon ().
3. View the current days reservation status in the Event Planner dashboard by doing the following:

   a. Go to the Reservations metrics section.

   b. Select one of the following tiles to view as a list:
      - **Planned reservations for today**
      - **Reservations with extra services for today**
      - **Canceled reservations of today**
      - **Pending approval reservations**

4. View the active reservations by doing one of the following:
   - View all the reservations by going to the All Reservations section.
   - View the reservation created by you or for you by going to the My reservations section.

   View more reservations by selecting **View all**.
5. Select the reservation that you want to print.
   The details of the reservation are displayed in a new tab.
6. Select **Print reservation**.
   The workplace reservation report is available in both the Activity and Attachments sections.

   Note: The Print reservation feature is only available for single- and multi-child reservations and is not available for blocker reservations and multi-parent reservations.

Cancel a reservation from the Event planner

As a reservation planner, the Event planner enables you to cancel a reservation at any time.

Before you begin

Ensure that you have installed the Calendar component (sn_calendar) of version 23.2.0 or later.

Role required: sn_wsd_rsv.reservation_planner

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select the **Event planner** icon from the menu ().
   The Event Planner dashboard opens.
3. To cancel any current day reservation, do the following:

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a. Go to the **Reservations** metrics section.

b. Select one of the following tiles to view as a list:
   - **Planned reservations for today**
   - **Reservations with extra services for today**

4. To view the active reservations, do one of the following:
   - To view all the reservations, go to the **All Reservations** section.
   - To view the reservation created by you or for you, go to the **My reservations** section.

   To view more reservations, select **View all**.
5. Select the reservation that you want to cancel.
   The reservation opens in a new tab. The details of the reservation are displayed.
6. Select **Cancel reservation** to cancel the reservation.
7. On the confirmation window, select **Confirm cancellation**.

Result
The reservation is canceled. The cancellation notes are automatically generated.

Open and view Location directory from Event Planner

Open and view the location directory portal from the Event planner home page and the Scheduled view.

Before you begin
Verify that the following applications are installed:

- Workplace Core
- Workplace Reservation Management
- Indoor Mapping

> **Note:** If Indoor Mapping is not installed, the option to open and view Location directory is not available on the Event planner home page.

- Indoor Mapping component
- Workplace Indoor Mapping
- Workplace Indoor Mapping component
- Workplace Stack plan
- Workplace Space Mapping

Role required: sn_wsd_rsv.reservation_viewer

Procedure
1. Navigate to **All** > **Workplace Central**.
2. Select the **Event Planner** icon ( ).
   The Event planner home page is displayed.

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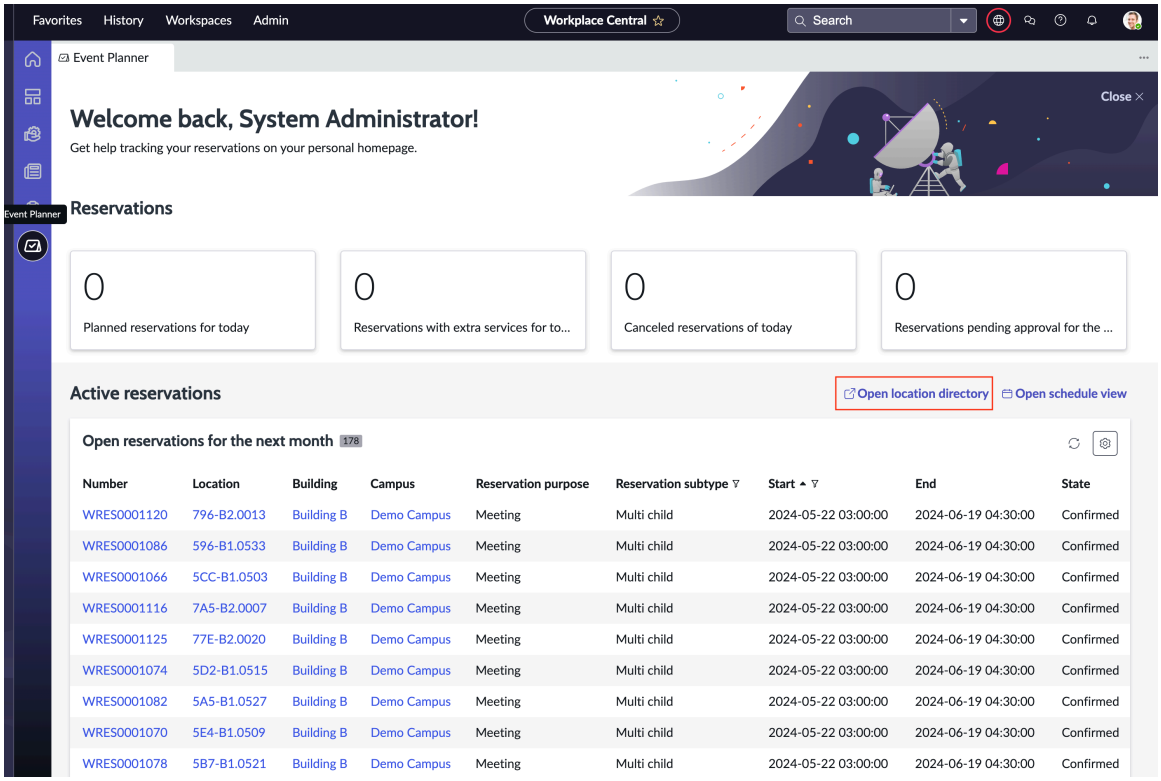
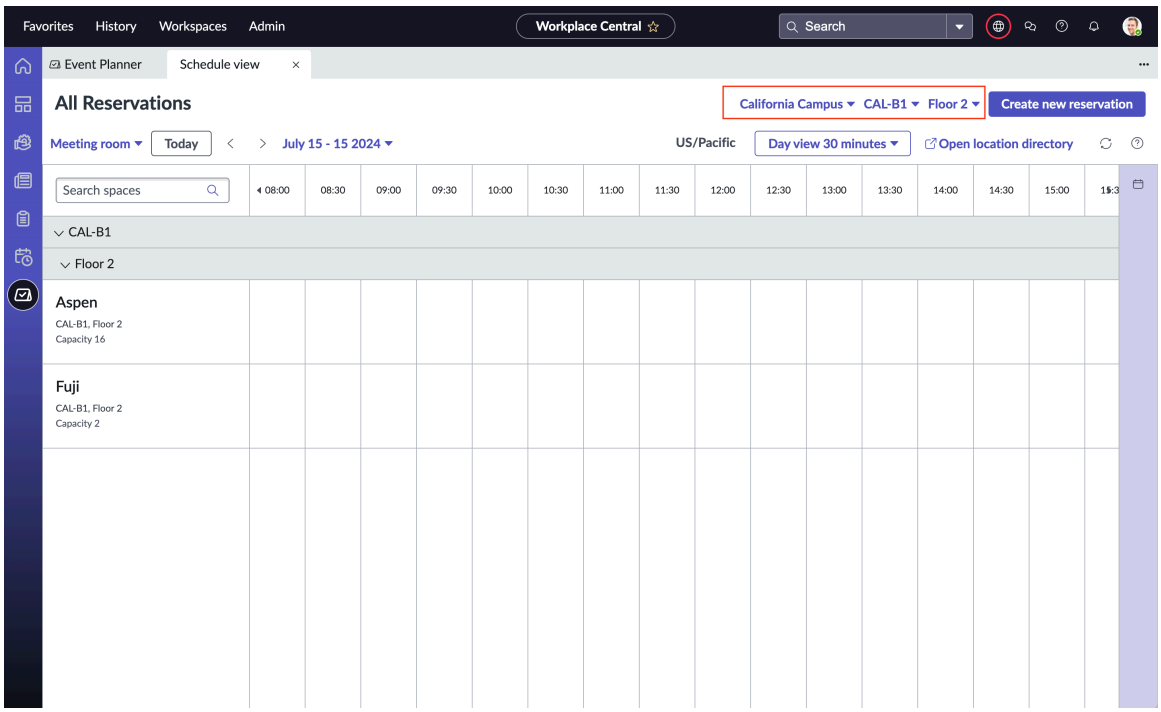


3. Select the **Open location directory** option.

   The Location directory home page opens in a new browser tab on the Employee Center portal.

   Card view is selected by default.

4. Select the **Open scheduled view** option on the home page.
5. Select **Open Location Directory** from the Scheduled view page.



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a. Based on your selection of a campus, building, or floor on the Scheduled view, the following options are displayed:

- Campus: Select a Campus. The buildings and floors within that campus are selected automatically. At a time, only one campus is available for selection.

  Note: If no campus is selected, the location directory portal opens without any context in the Card view.

- Building: Option to select a building.
  - Select a building. The Location directory portal opens with the building view showing the default floor information.
  - If more than one building is selected, the Location directory portal opens the first building that was selected and the floor that was selected in the Floor list options.
- Floor: Option to select a floor.
  - If multiple floors are selected, the location directory portal shows the floor that was selected first in the Card view. For example, Floor 1.
  - If only a floor is selected, the location directory opens that particular floor in the Card view.
  - If none of the floors are selected, the Location directory portal opens the selected building with the default floor.

b. In Scheduled view, if you don't select any campus, the landing page of the location directory opens without any context.

c. If you provide an invalid floor, a building, or a campus, a message is displayed.

"Looks like this location doesn't exist." You are redirected to the default Card view.

Working with Case management

Manage your workplace cases using the Case management workspace. Monitor the progress of the cases, update the cases and perform other actions.

Important: You need the case manager [sn_wsd_case.manager] role to access the Case management module.

Manage workplace cases using Case management

Monitor the workplace cases requested in your organization at any time using the Workplace Central Case management workspace.

Before you begin

Role required: sn_wsd_case.manager

About this task

Check the number of active cases and the details of those cases using the dashboard. Know the total number of cases that are currently critical, breached SLAs, unassigned and awaiting approval.

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Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ().
   The Case Management dashboard opens.
3. To view the number of cases based on their status, go to the **Overview** section.

   a. Select any of the following tiles to view the list of cases:
      - **All active cases**
      - **Open critical cases**
      - **SLAs breached**
      - **Unassigned cases**
      - **Cases awaiting approval**

   b. In the list view of the cases, perform any of the following actions if necessary:
      - Refresh the list
      - Edit the columns of the list
      - Apply the filter on the list
      - Assign the case to a user
      - Export the cases to the desired format
      - Create a case

   c. To add your own list, refer to Create your own list to view case metrics.

4. To view a list of all the active cases, check the **All active cases** section.

   a. **Optional:** From the list view, you can also assign one or more cases to another user using the **Assign** option.
   You can edit the columns of the list and also add filters if necessary.

   b. To view the case in detail, select the workplace case.

   c. To make changes to the workplace cases, refer to Work on a workplace case using Case management.

Create your own list to view case metrics

Configure a custom list to view workplace cases. You can view the workplace cases based on the filter that you apply and monitor the cases.

Before you begin

Role required: sn_wsd_case.manager

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About this task

By default, the dashboard displays the metric tiles and the list of all cases under various categories. When you select a metric tile on the dashboard, a list view opens with the associated cases. In the list view, on the left panel, the following lists are displayed by default:

- All cases
- All active cases
- All resolved cases
- Open critical cases
- SLAs breached
- Unassigned cases
- Cases awaiting approval

You can also create your own list on the panel based and view the workplace cases matching the set filter.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ().
   The Case Management dashboard opens.
3. In the **Overview** section, select any of the following tiles to open the list view.
   - **All active cases**
   - **Open critical cases**
   - **SLAs breached**
   - **Unassigned cases**
   - **Cases awaiting approval**
4. In the list view, on the left panel, select **My Lists**.
5. Select **Add new list**.
6. In the New List dialog box that appears, do the following:

   a. To create another version of the existing list, select the **Start from existing** tab.
      i. In the **List** field, select the list that you want to reuse.
      ii. In the **List name** field, enter a name for the list.
      iii. In the **Select columns** field, select the columns that you want to view additionally.
      iv. In the **Add filter** section, add the filters based on which the workplace cases must be filtered.

   b. To create a new list, select the **Create your own** tab.
      i. In the **List name** field, enter the name of the list.
      ii. In the **Select Source** field, select the source table.

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iii. In the **Select columns** field, select the columns that you want to view.

iv. In the **Add filter** section, add the filters based on which the workplace cases must be filtered.

c. Select **Create**.

Result
The custom list is added to the **My Lists** tab on the left panel. At any time, you can view the lists and manage the workplace cases.

Work on a workplace case using Case management

Update, edit, or resolve a workplace case at any time from a single workspace using the Workplace Central Case management workspace.

Before you begin
Role required: sn_wsd_case.manager

About this task
The dashboard enables you work on a case at any time. You can perform any action on a case such as update, edit, and even resolve a case when done. To save time from filtering the cases, the workspace, by default, displays the cases under various categories in the **Overview** section.

- Update the case details.
- Change the state of the case.
- Add comments or work notes.
- View or attach knowledge articles.
- Mark the checklist or add new checklist items.
- View the employee details who requested the case and mail them directly if necessary.
- View the workplace location on the floor map. For move cases, view the **From location** and **To location** on the map.
- Create child cases and child tasks if needed. For more information, refer to Create a child case and a child task.

For more information about the features and actions that you can perform in the workspace, refer to Case Management - Key features, Actions & Case details.

Procedure
1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ().
   The Case Management dashboard opens.
3. To open a case, do any of the following:
   - Go to the **Overview** section.

     Select the relevant tile to open the list of cases.
   - Go to the **All active cases** section.

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4. Select the case that you want to open.
   The list view displays the cases as WCASEXXXX for normal workplace cases, WMCXXXX for maintenance cases and WMOVEXXXX for move cases.
   The case details are displayed in a new tab. For more information about the view, the actions that you can perform and additional features, refer to the **Case details page** section in the Case Management - Key features, Actions & Case details topic.
5. **Optional:** Summarize the case using Now Assist for WSD.
   For more information about summarizing a workplace case, see Summarize a workplace case using Now Assist for WSD.
6. Perform your changes.

Action	Procedure
Edit the case's form fields	In the **Details** tab, do the following: **a.** Edit the field that you want to change. You can change the details such as the **Work place service** using which the case was requested, the **Workplace location**, **Assignment group**, **Assigned to** user, detailed **Description**, **Items at the location** and more. ▪ For move cases, you can edit the details such as the **From location**, **To location**, **Reason**. ▪ For maintenance cases, you can edit the details such as the **Product model** and **Enterprise asset**. **b.** Select **Save** to update the changes.
Add a comment or work notes	In the **Details** tab, do the following: **a.** Go to the **Compose & Activity** panel. **b.** To add a comment, select **Comments** tab and add your comment. **c.** To add private notes, select **Work notes (Private)** and add your notes. **d.** Select **Post comments** **e.** Select **Save** to update the changes.
View the activities performed on the case until the current date	In the **Details** tab, go to the **Activity** panel.
View the Requested foremployee details or send an email to them	Select the At a glance icon () on the right-side panel.

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Action	Procedure
	Note: The employee details are dis played by default when you open the case. However, the employee details are subject to availability in the system data base. If the details aren't available, the details of the admin or the case manag er are displayed. If no employee is specified in the **Re quested for** field, then the employee de tails aren't displayed. ○ In the **Employee details** panel, review the details. ○ To send an email, select the email address directly and do the following: **a.** In the New Email Draft page, compose your email and modify the subject if nec essary. **b.** To attach a file, select **Attach file**. **c.** To send the email, select **Send email**. You can also view draft emails using the **View drafts** option.
View knowledge base articles related to the case	Select the Knowledge Articles () on the right-side panel. ○ In the **Knowledge Articles** panel, search for an article. ○ To view the article on a separate page, on the article, select **Full view**. ○ To flag the article, select **Flag**. ○ To mark the article as useful, select **Helpful**.
View or upload attachments to the case	Select the Attachment icon (). ○ In the **Attachments** panel, view the attach ments. ○ To upload a file, select **Select**.
View the template of the case or add a tem plate	Select the Template icon (). ○ In the **Templates** panel, view the templates in the **All** tab. ○ To add a template, select  . ○ To view templates added by you, select **My Templates** tab. To create a template, refer to:

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Action	Procedure
	○ Create a Workplace case template ○ Create a Workplace task template
View the workplace location specified in the case; View the 'From' and 'To' location of a move case; View the asset location of a maintenance case	Select the Location icon ( ). ○ In the **Locations** panel, view the location de tails such as the location name, floor, build ing, campus, and region details. ○ To view the location on the map, scroll down to the **Map** section. On the map, you can do the following: ▪ Drag the map. ▪ Zoom in/out on the map. ○ For a move case, the **Location** panel dis plays the details of the**From location** and **To location** under the **Move from** and **Move to** tabs. ○ For a maintenance case, the **Workplace lo cation** panel displays the location of the as set specified in the case. If an asset isn't specified, then the workplace location se lected in the case is specified.
View the fulfillment instructions	Select the fulfillment Instructions icon ( ). To add fulfillment instructions, refer to Add Ful fillment instructions.
View or add checklist items	Select the Checklist icon ( ). ○ Mark a checklist if it's completed. ○ Edit a checklist if necessary. ○ Add a checklist item if necessary. If there are no checklist items, you can add them.
View the child cases or add a child case	Go to the **Child Cases** tab. **a.** View the child cases created with the case. Perform refresh, edit columns or apply filter if necessary. **b.** To create a child case, select **New**. Refer to Create a child case and a child task.
View the child tasks or add a child task	Go to the **Child Tasks** tab. ○ View the child tasks created with the case. Perform refresh, edit columns, or apply fil ter if necessary. ○ To create a child case, select **New**. Refer to Create a child case and a child task.
View the details of approvers	Go to the **Approvers** tab.
Vew the case SLAs and add an SLA	Go to the **Case SLAs** tab.

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Action	Procedure
	○ View the SLA details associated with the case. ○ Select **New** to add an SLA. To create the SLA definition, refer to Create an SLA Definition.
View the attached knowledge base articles	Go to the **Attached Knowledge** tab. View or add articles.
View the knowledge base articles viewed by the user	Go to the **KB Articles Read by User** tab. View or add articles.
View the related cases	Go to the **Related cases** tab. View the cases or add a case if necessary. Refer to Create a child case and a child task.
For a maintenance case, view the associated workplace cases	Go to the **Workplace Cases** tab. View the cases or add a case if necessary. Refer to Create a child case and a child task.
View the workplace service items requested with the case	Go to the **Requested Service Items** tab.

7. After making changes, select **Save**.

Result
The workplace case is updated or modified based on your changes. To cancel or delete the case, refer to Cancel or delete a case.

Create a workplace service case

As a case manager, apart from managing the workplace cases, you can also create a raise workplace service request directly using the Workplace Central Case management workspace.

Before you begin
Role required: sn_wsd_case.manager

About this task
Submit a workplace service request on behalf of an employee for any reason. You can directly raise a request using the Case management workspace.

Procedure
1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ( ).
   The Case Management dashboard opens.
3. To create a case, use any one of the following navigation:

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- On the Case Management landing page, scroll down to the **All active cases** section and select **New**.
- On the Case Management landing page, in the **Overview** section, open a tile and select **New** in the list view.

4. In the **Which service would you like to request?** dialog box, select the type of workplace service request that you want to raise.
   You can raise the following workplace service requests:
   - Reconfigure an office space
   - Request a desk change
   - Request furniture
   - Submit a general request
   - Submit a maintenance request
5. Select **Submit**.
   To fill the form, refer to Requesting a workplace service topics.
6. Select **Submit** to submit the request.

Result

The workplace service request is submitted and a workplace case is created. Refresh the **All active cases** list to view the workplace case.

Create a child case and a child task

As a case manager, to fulfill a case, you can create a child case and also a child task using the workspace.

Before you begin

Role required: sn_wsd_case.manager

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ( ).
   The Case Management landing page opens.
3. To open the case to which you want to add a child case/task, do any of the following:
   - Go to the **Overview** section.

     Select the relevant tile to open the list of cases.
   - Go to the **All active cases** section.
4. Select the case to which you want to add a child case/task.
   The case details are displayed in a separate tab. For more information about the view, the actions that you can perform and additional features, refer to the **Case details page** section in the Case Management - Key features, Actions & Case details topic.
5. To create a child case, do the following:

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a. On the case details page, select the **Child Cases** tab.

b. Select **New**.

c. On the form, fill in the fields.

Create New Workplace Case form

Field	Description
Workplace service	Select the workplace service of the case.
Workplace location	Select the location for which you're creating the child case.
State	Select the state of the case. By default, the state is set as Draft.
Assignment group	Select the assignment group to which you want to assign the case.
Assigned to	Select the location for which you're creating the child case.
Requested for	Select the user for whom you are creating the case.
Enable user acceptance	Select the option if you want to enable user acceptance for the case.
Contact type	Specify the contact mode.
Short description	Enter a short description about the case.
Description	Enter a detailed description about the case.
Additional comments	Add any comments regarding the case. The comments are visible to the requester.
Work notes	Add work notes to the case. The notes are visible only to you.
Time worked	Tracks the total time spent on a case or task. The timer starts at zero, tracks time until the record is saved or closed, and resumes when revisited. You can also manually adjust, pause, or resume the timer.

d. To attach any file, select the Attachment icon ( ) on the side panel.

e. To configure a template for the case, select the Template icon ( ).

f. Select **Save**.
The child case is created.

6. To create a child task, do the following:

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a. On the case details page, select the **Child Tasks** tab.

b. Select **New**.

c. On the form, fill in the fields.

Create New Workplace Task form

Field	Description
State	Select the state of the task. By default, the state is set as Open.
Workplace task type	Select the type of task.
Assignment group	Select the assignment group to which you want to assign the task.
Workplace location	Select the location for which you're creating the child task.
Assigned to	Select the location for which you're creating the child task.
Sign template	Select the signing template.
Vendor	Select the vendor for the task.
Workplace service activity	Select the Workplace service activity to implement the task.
Short description	Enter a short description about the task.

d. To attach any file, select the Attachment icon ( ) on the side panel.

e. To configure a template for the task, select the Template icon ( ).

f. Select **Save**.
The child task is created.

7. After adding the child case/child task, select **Save** to save the changes.

Print a workplace case

As a case manager, apart from managing workplace cases, you can also print a workplace case using the Workplace Central Case management workspace.

Before you begin

Role required: sn_wsd_case.case_reader, sn_wsd_case.case_writer, sn_wsd_case.workplace_agent

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
You can also open Workplace Central from the Employee Center directly by navigating to **Workspaces** > **Workplace Central**.

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2. In the Workplace Central pane, select the Case Management icon ( ).
3. In the Case Management landing page, open the case that you want to cancel or delete using either of the following navigations:
   - Go to the **Overview** section.

     Select the relevant tile to open the list of cases.
   - Go to the **All active cases** section.
4. Select the case.
   The case details are displayed in a separate tab.
5. On the case details page, select **Print case**.
   The workplace case report is available in both the Activity and Attachments sections.

Managing print case

Filter workplace cases using criteria such as Short Description, Workplace Location, or other relevant fields to generate a consolidated report using the Workplace Central Case management workspace.

Use one of the following options to proceed:

- Print Filter Selection – Apply filters and select this option to create a workplace task with the consolidated report attached.
- Print Selected Records – Manually select one or more workplace cases and choose this option to view the consolidated report directly.

Print filtered cases

Use filter criteria to filter multiple cases and generate a consolidated report based on the filtered cases. You can set the condition based on the Short description, workplace location, or any other fields. When you run the filter and select Print filter selection, a new workplace task is created with the consolidated report as an attachment.

Before you begin

Role required: sn_wsd_case.case_reader

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ( ).
   The Case Management landing page opens.
3. Select the filter icon and set the filter criteria.
   The results appear based on the filtered condition.
4. Select **Print filter selection**.
   You can view the consolidated report with the filtered case details in a new Workplace Task page.

Print selected cases

Print a consolidated report, including task details and associated services, by selecting one or more workplace cases.

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Before you begin
Role required: sn_wsd_case.case_reader

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ( ).
   The Case Management landing page opens.
3. Select one or more workplace cases.
4. Select **Print selected cases**.
   You can view the consolidated report with the selected case details in a new Workplace Task page.

Cancel or delete a case

As a case manager, cancel a workplace case at any time if it's no longer required. As an admin, delete a case record completely from the application if it's no longer required.

Before you begin
As a workplace case manager, you can cancel a case if it's no longer required. Cancelling a case cancels all the child cases and child tasks associated with the case. The state is set to Cancelled.

Important: Only an admin can delete a case. A case admin can delete only a workplace case, a move admin can delete only a move case and, a maintenance admin can delete only a maintenance case.

Role required: admin (to delete a case) and sn_wsd_case.manager (to cancel a case)

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select the **Case Management** icon ( ).
   The Case Management landing page opens.
3. Open the case that you want to cancel/delete using any of the following navigations:
   - Go to the **Overview** section.

     Select the relevant tile to open the list of cases.
   - Go to the **All active cases** section.
4. Select the case.
5. To cancel the case, do the following:
   a. On the case details page, select **Cancel**.
   b. On the confirmation window, select **Yes**.
   The case and all the child cases, child tasks, flows associated with the cases are cancelled and the state is set to Cancelled.

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6. To delete a case, do the following:

> **Important:** Only an admin can delete a case. A case admin can delete only a workplace case, a move admin can delete only a move case and, a maintenance admin can delete only a maintenance case.

a. On the case details page, select the Delete icon ().

> **Note:** These option appears only for workplace users with admin rights.

b. Select **Delete**.

c. On the confirmation window, select **Yes** to delete.
The workplace case record, the associated SLAs and more are deleted from the application.

Working with Kiosk Indoor Mapping

Create indoor maps and configure map elements for Workplace Services Kiosk.

Configure map features for kiosk

Configure map features such as actions and data visualization for the kiosk.

Before you begin

Role required: sn_wsd_indoor_map.admin and sn_wsd_central.workspace_user

Procedure

1. Navigate to **All** > **Workplace Central**.
You can also open Workplace Central from the Employee Center by navigating to **Workspaces** > **Workplace Central**.
2. Select the Kiosk Indoor Mapping icon ( ).
3. On the Map Feature Configurations list, select **New**.
4. On the form, fill in the fields.

Map Feature Configurations form

Field	Description
Name	Name of the feature configuration record.
Order	Order of the feature configuration on the kiosk.
Reservable Module	Browse and select the Kiosk Reservable module. For more information, see Configure Reservable Module for kiosk reservation.
Space Reservation	Select the check box option to allow employees and guests to select a space on the map and make a reservation on the Kiosk Map. If this option is not selected, the option to select a **Reservable Module** for Kiosk is not displayed. After selecting the Reservable Module for a kiosk and enabling Space Reservation

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Field	Description
	option, kiosk operators can bind a physical device to a kiosk. This allows visitors or guests to make a reservation on the Kiosk Map. For more information, see Select a kiosk for a device. After a kiosk is assigned to a physical device, employees and guests can make reservations on a selected kiosk device. For more information, Make workplace reservations on the kiosk.
Allowed actions	Actions that the user can perform on the kiosk. You can select multiple actions from the list. The **Raise a case** action is available if you have installed Workplace Case Management.
Data visualization	Data visualization elements, such as neighborhoods and space filters, for the kiosk user. You can select multiple visualization options from the list. The available elements depend on the applications that you have installed in your instance. For example, **Occupancy data** is available only if you have installed Workplace Connectors.

5. Save the record.

Result
The map configuration is saved as a record in the Indoor map kiosk module.

Configure the kiosk position and map settings

Configure the kiosk position and camera position on the map.

Before you begin
Create a kiosk configuration to use for the kiosk indoor mapping feature. For more information about creating a kiosk configuration, see Create a kiosk configuration.

Role required: sn_wsd_indoor_map.admin and sn_wsd_central.workspace_user

Procedure
1. Navigate to **All** > **Workplace Central**.
2. Select the Kiosk Indoor Mapping icon ( ).
3. On the Kiosk Map Configurations list, select the record that you want to configure.
   For more information about creating a kiosk configuration, see Create a kiosk configuration.
   The **Map configuration** tab is open by default.
4. On the Kiosk Placement pane, select **Place Kiosk on Map**, then select a position on the map.
5. On the Kiosk Placement pane, select a view type for the map.

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6. Enter a kiosk title to be displayed to the kiosk users.
7. Select **Save Placement**.
   The kiosk placement is saved on the map. You can edit the placement or remove the kiosk from the map.
8. Select the Map Settings icon.
9. Select **Edit position**, then move the map to set the default camera position.
   You can also enter values in the fields to set the camera position. From Workplace Services Kiosk version 1.4.3, you can enter decimal values for the camera position.

Map Settings value ranges

Field	Value Range
Default Zoom	16 to 23
Default Bearing	-180 to 180
Default Pitch	0 to 60

10. Select **Confirm**, then select **Save Configuration**.

Result
The kiosk position and map settings are saved in the kiosk configuration.

Trouble?

If you get the `Map can't be initialized` error on the Map configuration tab, try any of the following actions:

- Ensure that the kiosk location matches the location of the map that you want to use.
- Provide the view type permissions to the user who must have access to kiosk indoor mapping.
- Navigate to **All** > **Indoor Mapping** > **View types**
  - Ensure that the **Kiosk** view type is active.
  - If the **Kiosk** view type is not available, ensure that you have installed Workplace Services Kiosk.

Configure a module for kiosk indoor mapping

Create a module for the kiosk to decide the flow for the kiosk.

Before you begin
Role required: sn_wsd_kiosk.admin and sn_wsd_central.workspace_user

Procedure

1. Navigate to **All** > **Workplace Central**.
2. Select the Kiosk Indoor Mapping icon ( ).
3. On the Kiosk Map Configurations list, select the record that you want to configure.
   For more information about creating a kiosk configuration, see Create a kiosk configuration.
   The **Map configuration** tab is open by default.
4. Select the **Module configuration** tab.
5. On the Kiosk modules list, select **New**.

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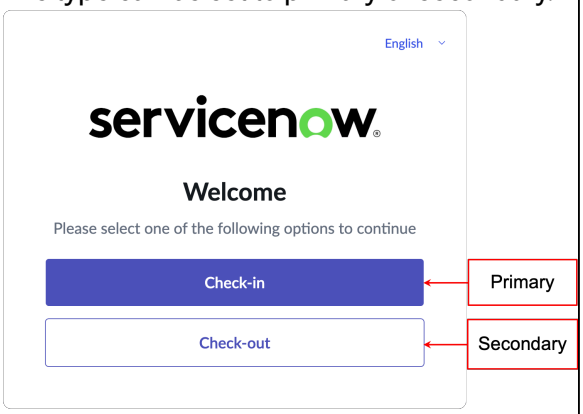
6. On the form, fill in the fields.

Kiosk module configurations form

Field	Description
Kiosk configuration	Kiosk configuration that the module is linked to.
Module configuration	Configuration record for the kiosk module. For more information about creating a module, see Create a kiosk module. For more information about creating a map configuration, see Configure map features for kiosk.
Active	Status of the kiosk module configuration.
Type	Type of color scheme you want to set for the kiosk module configuration. The type can be set to primary or secondary. 
Order	Order of preference of the kiosk module.

Note:

- The kiosk device automatically maintains the session before it times out. The session timeout value can be configured in the *glide.ui.session_timeout* property.
- The kiosk header contains the session refresh API; ensure that you do not remove or replace the kiosk theme or the kiosk header.

  For information about customizing the kiosk header, see Customize the kiosk header.

7. Save the record.
   The Kiosk module is created and linked to the configuration.

Manage Workplace Central

Monitor your workplace-related activities. View the metrics and the list of activities that are created at any time.

To customize a page in the Workplace Central application, refer to the knowledge base article: https://support.servicenow.com/kb?id=kb_article_view&sysparm_article=KB1639123.

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Approve a scenario

As a workplace manager, you can approve or reject when a scenario is sent for approval

Before you begin

Ensure the following:

- You have the Scenario reader role [sn_wsd_spcmgmt.scenario_reader].
- You have the permission to approve.

Role required: sn_wsd_core.workplace_manager and sn_wsd_spcmgmt.scenario_reader

About this task

As a workplace manager, you can approve a scenario. The Workplace Core Approval definition, provides the **Scenario Plan Approval** by default to perform scenario approval. The approval definition consists of a **Scenario Plan Approver** performer criteria, in which all the workplace managers are configured to approve scenarios. To configure more approvers, refer to Configure approvers of a scenario.

Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select the approval that is in **Requested** state.
   You can also use filter options to view only those approvals that are in the **Requested** state.
3. To view the scenario before approving, in the **Approving** field, select Preview this record icon ( ).
4. Select the **Open Record** tab from the preview window.
5. On the Scenario Plan form, select **Open scenario plan**.
   The scenario stack plan opens in a read-only mode.
6. Review the scenario.
7. After reviewing the scenario, to approve or reject, perform the steps 1 and 2 again.
8. On the form, do any one of the following:
   - To approve the scenario, select **Approve**.

     The scenario is approved.
   - To reject the scenario, do the following:
     a. In the **Comments** field, specify the reason for rejection.

        If you want to suggest any changes in the scenario, briefly details the changes.

     b. Select **Post** after entering you comments.
     c. Select **Reject**.

        The scenario is rejected.

Result

The scenario is approved or rejected based on what action you performed. If the scenario is approved, then the state of the scenario changes to Approved. If it is rejected, then the scenario state is changed to Rejected.

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View workplace scenarios

Track the number of scenarios created in your workplace. View the scenarios that are in the published state, in the draft state, and more.

Before you begin

Role required: sn_wsd_spcmgmt.space_planner

About this task

View the scenarios created in your workplace using the Space optimization module. The Space optimization module provides you with metrics for scenarios based on their current state. You get a list of total scenarios and of scenarios that were created based on buildings. At any time, you can monitor the status of a scenario by checking the Space optimization module. For more information about the Space optimization module, refer to Space Optimization - Key features and actions.

Procedure

1. Navigate to any one of the following locations:
   - **All** > **Workplace Central** > **Workplace Central**.
   - **All** > **Scenario Planning** > **My Scenario Plans**

   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. On the left pane, select **Space Optimization** icon ().
   The Space optimization dashboard opens.
3. **Optional:** View the numbers of the scenarios based on their current state by seeing the **Scenarios** section.
   You can also select the numbered tile to view the details of the scenarios.
4. **Optional:** View all the scenarios regardless of their current state.

   a. In the Scenarios section, go to **All scenarios**.
   A list of scenarios is displayed. The list displays five scenarios at a time.

   b. View all the scenarios by scrolling down the list and clicking **View all**.
   The **Scenarios** tab opens.
5. View all the buildings of your workplace.
   You can open a building and view the building on a stack plan. The stack plan displays the current scenario that is deployed on the building. You can also create a scenario directly from a building scenario plan.

   a. In the Scenarios section, go to **All buildings**.
   A list of buildings is displayed. The list displays five buildings at a time.

   b. View all the buildings by scrolling down the list and clicking **View all**.
   The **Buildings** tab opens.

Raise a space assistance request

Submit a workplace service request to get space allocation recommendations using the Workplace Service Portal. The Workplace Service Delivery space assistance provides you with the best space allocation plan options based on the space quantity and the department that you

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specify. You can select the most suitable allocation or none. Depending on your selection, the Space planner deploys the plan to use.

Before you begin

Ensure the following:

- Workplace Central plugin is installed.
- Workplace Case Management plugin is installed.
- To view the space recommendations on the map, the floor map must be configured using Workplace Indoor Mapping.

Role required: sn_wsd_core.workplace_user

About this task

Specify the department and number of spaces that you want to assign to that department on a floor. Specify the location where you want to see the allocation recommendation. Depending on the specification submitted on the form, the system provides you with options containing the most suitable space allocation plans in that building. If the selected department exists on the floor that you selected, then the spaces are recommended nearby to that department.

You can select the best option and submit the selection. If an approval is configured, then the plan is sent for an approval to your manager. The selected space plan is directed to the space planner. The space planner reviews the plan and deploys it accordingly.

Procedure

1. Navigate to **All** > **Workplace Core** > **Workplace service portal**.
   The Workplace Service Portal opens.
2. Open the General category.
   a. Select **Catalog**.
   b. Select **Browse by Categories**.
   c. In the Workplace Services Catalog, select **General**.

   > **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **General**.
3. Select **Space assist request**.
4. On the form, fill in the fields.

Space assist request form

Field	Description
Request name	Descriptive name for the request.
Allocate space by	The allocation type is set with the default allocation type set by your administrator. **Note:** If there is no allocation type specified, then you cannot proceed with the request.

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Field	Description
Requested for	Option to specify the user for whom you are raising the space assistance request.
Select a department	Department based on which you want to allocate spaces. This option appears if **Department** is set in the **Allocate space by** field.
Select a Cost center	Cost center based on which you want to allocate spaces. This option appears only appears if **Cost center** is set in the **Allocate space by** field.
Select a workplace entity type	Workplace entity type based on which you want to allocate spaces. This option appears if **Workplace Entity** is set in the **Allocate space by** field.
Select a workplace entity	Workplace entity based on which you want to allocate spaces. This option appears if **Workplace Entity** is set in the **Allocate space by** field.
Reason for request	Option to select the reason for the request.
Space type	Option to specify what type of spaces you want.
Exact match (Space type)	Option to confirm that you want to see only the spaces that are an exact match to the selected space type.
Assignment type	Option to specify if you want flexible or permanent spaces.
Quantity/Capacity	Number of spaces that you want to allocate.
Region	Region where you want to make space allocation.
Campus	Campus where you want to make space allocation.
Site	Site where you want to make space allocation.
Building	Building where you want to make space allocation.
Exact match (Building)	Option to confirm that you want see only the spaces that are an exact match to the selected building.
Move-in date	Option to specify the date from when you want to implement the space allocation.
Exact match (Move-in date)	Option to confirm that you want see only the spaces that are available on the selected move-in date.

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Field	Description
	This option is not available from Workplace Space Management version 1.12.0.
Move-out date	Option to specify the date until when you want to allocate the spaces.
Exact match (Move-out date)	Option to confirm that you want see only the spaces that are available until the selected move-out date. This option is not available from Workplace Space Management version 1.12.0.
Add attachments	Option to attach any supporting files if necessary.

5. Select **Submit**.
   The request is submitted. After the submission, the request details page is opened.
6. In the My request page, select **Space plans**.
   Refresh the page to view space plan options.
   The page displays options that have the most suitable space allocations for the select cost center or department on the selected floor, along with the match percentage.
7. Review the options that are displayed.
   The match percentage is displayed under each option.
8. **Optional:** View the space allocations on the map by selecting **View spaces on map**.

   Note: You can view the space allocations on the map only if the floor has a floor map configured.

9. Select an option from the provided options.

   a. In the My request page, select **Tasks/To-dos**.

   b. In the **Select a space plan option**, select **View task**.
   A page with all the options that are displayed in the **Space plan** is displayed for selection.

   c. Select **Select** next to the option that you want to proceed with.

   d. **Optional:** If you do not want to select any option for any reason, select **None of the above**.

   Note: If you select **None of the above**, the request is closed and the state will be set to **Closed complete**

   e. After selection, select **Submit**.

Result

The option that you selected is submitted. At any time, you can view your selected option in the **Space plans** tab. After you submit the selection, the following actions are performed based on the approval process configured by your organization:

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- If an approval process is configured for your user profile, then the space request is sent to your manager for approval. The state of the space request changes to Awaiting approval.
  - If your manager approves, the space request is sent for deployment and the state changes to Approved.
  - If your manager rejects, then the space request is rejected and the state changes to Closed incomplete.
- If your user profile doesn't require an approval, then the space request is transferred to your organization's space planner and the state changes to **Approved.**

Approve a space assist request

As a workplace manager, you can approve or reject a space assist request.

Before you begin

Make sure you have the following:

- You have the permission to approve.
- You're the manager to the user that raised the space assist request.

Role required: sn_wsd_core.workplace_manager

About this task

As a workplace manager, you can approve a space assist request raised by a user who is assigned to you. The Workplace Core Approval definition, provides the **Space Recommendation Approval** by default to perform space request approval. The approval definition consists of a **Space Recommendation Approval Config** performer criteria, in which all the workplace managers are configured to approve space assist requests.

Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select the approval that is in **Requested** state.
   You can also use filter options to view only those approvals that are in the **Requested** state.
3. To view the request details before approving, in the **Approving** field, select the Preview this record icon ( ).
4. Select **Open Record**.
5. Review the request details.
6. After reviewing the details, to approve or reject, perform the steps 1 and 2 again.
7. On the form, do any one of the following:
   - To approve the request, select **Approve**.

     The request is approved.
   - To reject the request, do the following:
     a. In the **Comments** field, specify the reason for rejection.

        If you want to suggest any changes in the request, briefly detail the changes.
     b. Select **Post** after entering your comments.
     c. Select **Reject**.

        The request is rejected.

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Workplace Central reference

Learn more about the components and forms of the Workplace Central application.

Components installed with Workplace Central

Several types of components are installed with activation of the Workplace Central application, including tables, user roles, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles

Roles installed with Workplace Central

Roles	Description	Contains roles
sn_wsd_central.workspace_user	Has access to the Workplace Central workspace.	canvas_user
sn_wsd_central.workplace_analytics_user	Has access to the Workplace Analytics workspace	sn_wsd_central.workspace_user

For details of roles that are required to use the Workplace Central, refer to the roles installed with Workplace Space Management and Workplace Move Management.

Tables

Tables installed with Workplace Central

Table	Description
Utilization vs Capacity [sn_wsd_spcmgmt_utilization_capacity]	A table to store Capacity and Utilization drilled down to the area level.

Scripts

Scripts installed with Workplace Central

Table	Description
WSDSpaceMgmtAnalyticsSNC	Script which populates the capacity vs utilization table for Space Management in Workplace Analytics

Space Optimization - Key features and actions

As a space planner, you can perform multiple scenario-related actions using the Space Optimization module. You can create a scenario using the stack plan and view it on a floor map and make changes directly.

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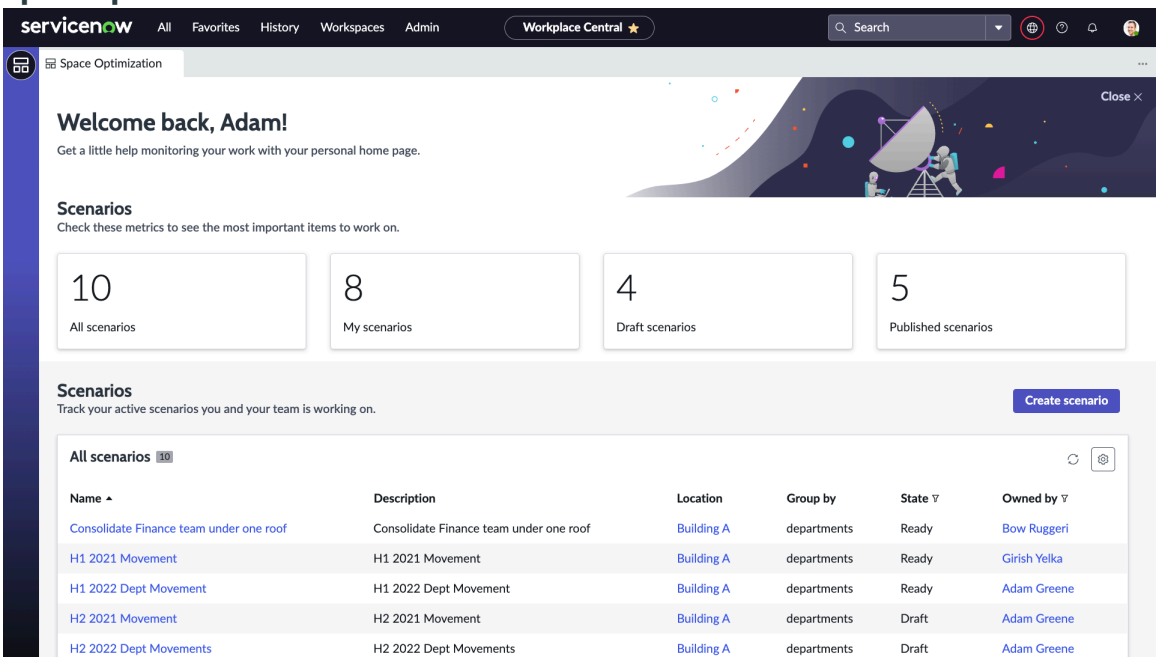
Space Optimization module



You can create a scenario, track the scenario metrics, view scenario details, and view building details from the module. The Space Optimization displays the following information:

- **Scenarios**: Displays the scenario metrics.
- **Create scenario**: Option to create a scenario for a building. For more details on how to create a scenario, see Create a scenario.
- **Scenarios**: Lists the details of the following:
  - Details of scenarios such as name, location, state, and owner.
  - Details of the building of your organization.
  You can select a scenario or building to view more details.

You can also view scenarios created by you in the Scenario planning application. Navigate to **All** > **Scenario Planning** > **My Scenario Plans**.

Scenario metrics

As a space planner, you can see the total number of scenarios that are currently created in your organization in filtered tiles. You can select each tile to view more details in a list.

In the Scenarios metrics tiles, the numbers are displayed based on the following:

- **All scenarios**: Total number of scenarios that are created in the application.
- **My scenarios**: Total number of scenarios owned by you.
- **Draft scenarios**: Total number of scenarios created by you that are in draft state.
- **Published scenarios**: Total number of your scenarios that are published.

You can also select a tile to view the list.

Scenario details

As a space planner, you can view the list of all the scenarios created in your organization. The details such as name, location, state, owner, and more are displayed. You can configure the list

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view settings based on what details you want to view about a scenario. The homepage displays five scenarios at a time and to view more, select **View all**.

- When you select **View all**, the list is opened in a separate tab where you can view all the scenarios created in your organization with their details.
- You can also perform the following actions on the list:
  - **Copy**: Create another copy of an existing scenario to make new changes. You can copy only one scenario at a time. The copied scenario is created with the same name appended with '- Copy 2'.
  - **Delete**: Delete one or more scenarios if they're no longer required.
  - **Create scenario**: Create a scenario.
  - Refresh the list.
  - Edit the column.
  - Add or remove filters.

Building details

As a space planner, you can view the list of buildings of your organization on the Space optimization module. You can configure the list view settings based on what details you want to view about a building. The homepage displays five scenarios at a time and to view more, select **View all**. When you select **View all**, the list is opened in a separate tab where you can view all the buildings of your organization and their details. You can refresh the list, edit columns, or apply building-related filters.

When you select a building, the building is opened in a stack plan view where you can see all the space allocations and floor arrangements. A stack plan is a visual representation of all the allocations made on a floor of a building. Every allocation is displayed in a bar based on the department or cost center that is assigned to. For more information about stack plan view and floor map view, refer to Scenario and Building - Views, states, settings, and key features.

- The details of the building such as its total capacity, total number of spaces, and location are displayed on top of the plan.
- You can see the total number of unallocated spaces of the building in total as well as floor-wise.
- You can view the building details in a stack plan view or a floor map view. The floor map view is available only if you have Workplace Indoor Mapping floor maps configured. The floor map view enables you to view the allocation on a floor map and make any changes directly.
- You can view the spaces allocated to a department, cost center, or workplace entity in the stack plan or on the floor map. You can choose how you want to view the allocations. Select a view using the **View by** option.
- You can select a bar on the stack plan or a space on the floor map to view more details, such as capacity count, capacity ratio, and total capacity. You can also select a bar to view the same details in a tooltip. Select a bar to to display details related to assignments and the department.
- You can view other scenarios related to the building in the **Related scenarios** tab.
- In the **Settings** tab, you can apply a filter based on which you want to see the spaces on a floor.
- You can't edit a scenario when you open it in the building view. To edit a scenario of a building, copy that scenario and make changes. The scenario copies the exact building data and enables you to make changes. The changes don't affect the main data as long as it's deployed. To create a scenario of a building, you can also select the **Create scenario** option when the building is open in the stack plan view.

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Workplace Central Event planner

The Workplace Central Event planner is a one-stop workspace where you can check all the reservations requested in your organization at a time.

Event planner capabilities

You can view all the reservations of your organization in this single workspace, and monitor how many workplace locations are engaged by employees. Using the planner, you can perform the following actions:

- Access the event planner as a Reservation planner and a Reservation viewer.
- Set the start and end time displaying on the calendar in the schedule view.
- View various reservations such as single, recurring occurrences, multi-child, group, and more.
- Check the available and unavailable spaces at any time.
- Directly view or edit reservations requested in any campus, building, or a floor when required.
- Open and View Location directory using Event planner.
- View the planner in a Scheduled view. Open Location directory from the Scheduled view.
- Change a reservation to an earlier or later date or time.
- View detailed information of each reservation requested either in the past, on the current day or that are upcoming.
- View details such as the requester, the current state of the reservation, the check-in and check-out status, the invitees, the number of people attending and more.
- Create a reservation.
- As a reservation planner, you can perform the following actions:
  - Drag a reservation to another date and time to reschedule.
  - Drag and drop a reservation with service items to another time or another location. The service items can't be modified but the quantity of the service items can be modified.

    Note: If the new location or time does not have one or more added services, then a message is displayed informing "This change will result in the loss of one or more services for this reservation".

  - Change the reservation timings.
  - Change the location of the reservation.
  - Cancel a reservation.

    Note: Only selected reservation occurrence is deleted when a recurring reservation is cancelled, and not the complete recurrence series. You can cancel the complete recurring reservation from the portal.

  - Open a reservation and make advanced changes and also add services.
  - Edit the reservation from the contextual side panel of the calendar. This functionality is available only for single and recurring reservations.

    Note: When you modify a building value in an existing reservation, because the previous location is not available in the updated building, selecting it throws an error. You can select a different location.

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- As a reservation planner, you can manage single or occurrence reservation details. You can also edit reservation details such as the reservable purpose, number of attendees and cost center from the details reservation details pages directly.

  Note: You can manage a multi-location or a group reservation only by opening the reservation details and not with the schedule view.

Important: Reservations created using a calendar provider can only be managed using the calendar provider.

Landing page

The Event planner landing page consists of the following sections:

Reservations

The metrics of the reservations are displayed in the section. The metrics of the current day's planned reservation, requested extra services, canceled reservations, and pending approval reservations.

Active reservations

This section displays the detailed list of all the reservations requested in the organization and the reservations requested by you. You can also view the reservations in a schedule view using the **Open schedule view** option.

Reservation metrics

On the Event planner landing page, you can view the reservation metrics in the **Reservations** section. The following metric cards are displayed. You can select the metric card to view the respective reservations in a list.

Planned reservations for today

Number of reservations scheduled for the current day (today).

Reservations with extra services for today

Number of reservations that have extra service requests for the current day (today).

Canceled reservations of today

Number of reservations that have been canceled for the current day (today).

Pending approval reservations

Number of reservations that are awaiting approval.

Reservations list view

The **Active reservations** section on the landing page displays a list of reservations. You can view all the reservations and reservations requested by you. The **Active reservations** section displays the following:

All Reservations

The **All Reservations** section displays the list of reservations created in throughout your organization. The list displays ten reservations at a time. Select the **View all** option to view all the reservations. You can view the following details:

- The reservations requester.
- The location on which the reservation is created.
- The building and campus where the location resides.
- The reservation purpose.

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- The reservation types such as single, occurrence, multi-child, group, and others.
- The start and end time of the reservation.
- The current state of the reservation.

You can refresh the list whenever required. You can also edit the columns of the list based on how you want to view the list.

My reservations

The **My reservations** section displays the list of reservations that you have created either for yourself or for others. The list displays 10 reservations at a time. Select the **View all** option to view all the reservations.

You can refresh the list whenever required. You can also edit the columns of the list based on how you want to view the list. You can configure to display up to 10 columns at a time.

Reservations schedule view

The event planner enables you to view all the reservations in a schedule view using the **Open schedule view**.

The schedule view opens a time-line view displaying all the workplace locations of your organization such as campuses, buildings, floors, and spaces on that floor. The schedule view has the following capabilities:

Campus selection

On the top right of the schedule view, you can specify the campus for which you want to view the reservations using the **Campus** option. After you specify the campus, the **Buildings** and **Floors** filters are automatically generated. You can specify the building and the flood that you want to view respectively. As an admin, you can configure the number of campuses that must be displayed in the drop-down selection. You can specify the number in the *`Maximum number of items that can appear in filter drop down of campus, buildings and floors in Event Planner Experience.`* property.

After you specify your campus, the selection is retained and is displayed by default when you open the schedule view next time.

Reservable purpose

You can use the **Reservable purpose** option to filter the spaces of the campus based on the reservable purposes configured in your organization.

Date

You can view the reservations of any date by selecting a date on the calendar. You can select **Today** to view the current day on the calendar.

Timezone

The schedule view time line is set based on the time zone of the selected location.

Time frame

You can specify the time frame of the schedule view using the drop-down location on the top-right corner of the view. By default, the time frame is set as **Day view 30 minutes**. You can choose to view the time in a one hour window or a week view.

Event Planner Schedule

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You can set the start and end time that displays on the calendar in the schedule view from the system properties *Start time Event Planner Schedule* ,and *End time Event Planner Schedule*.

Snap duration

When you drag and drop a reservation, you select and move the reservation by some duration and the duration is called Snap Duration.

The default snap duration for a 30-minute and 60-minute view of the event planner schedule view is 5 and 15 minutes, respectively. The minimum and maximum values to set a snap duration for a 30-minute view is 1 and 30, and for a 60-minute view is 1 and 60. You can modify the default values using the system properties *Snap duration for 30 min view of Workplace Event Planner Schedule View* and *Snap duration for 60 min view of Workplace Event Planner Schedule View*.

Schedule view properties

Configure the *sn_wsd_rsv.row_title_fields_event_planner_schedule* system property to specify comma separated field names from space table to display in Row title in Schedule view.

Configure the *sn_wsd_rsv.event_body_fields_event_planner_schedule* system property to specify comma separated field names from reservation table to display on Reservation event in Schedule view.

Configure the *sn_wsd_rsv.additional_space_details_fields* system property to specify comma separated field names from space table to display on Space details side panel in Schedule view.

Refresh

You can refresh the view at any time by selecting the Refresh option.

Legend

You can view the color legend based on which the reservations are displayed. The legend displays the colors associated with each state. As an admin, you can modify the colors associated with each state in Workplace Reservation Management properties. Navigate to **All** > **Workplace Reservation Management** > **Administration** > **Properties** to modify the properties. You can edit the following properties and specify your colors:

- Color for Draft reservations in Event Planner Experience
- Color for In progress reservations in Event Planner Experience.
- Color for Awaiting confirmation reservations in Event Planner Experience.
- Color for Confirmed reservations in Event Planner Experience.
- Color for Completed reservations in Event Planner Experience.
- Color for Awaiting approval reservations in Event Planner Experience.
- Color for Approved reservations in Event Planner Experience.
- Color for Rejected reservations in Event Planner Experience.
- Color for Conflicted reservations in Event Planner Experience.
- Color for Read only reservations in Event Planner Experience.

Specify the hex code for the color.

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Search spaces

You can directly search for a space using the **Search spaces** option.

Reservations

The reservations created on a space are displayed as a bar expanded between start and end time. The reservations are displayed in colors based on their current state. You can view the color legend to know the state.

You can select the reservation to view details such as the reservation start and end time, duration, subtype, status, and services requested if there are any.

- You can also view further details of the reservations on the side panel by selecting the Open side panel icon ( ).
- To open the reservation and view it on the portal, you can select the **Open reservation** option. The reservation is displayed in Employee Center by default. If you want the reservation to open on a custom portal instead of Employee Center, you must perform the following actions:
  1. Navigate to **System Definitions** > **Script includes**.
  2. Search and open **WPCoreUtils**.
  3. In the **Script** field, override `getCommonPortalSuffix` function to get the common portal suffix.
  4. Click **Update**.
- You can also select the Show ( ) icon to get a detailed view of the reservation. The side panel displays the reservation-related details such as the location, start and end time, current state, synchronization state, reservation subject and services requested. As a reservation planner, you can also cancel the reservation using the **Cancel reservation** option.
- You can also move the reservation to another time or to another location by dragging the bar of the reservation.

Last updated sub source

- When a reservation is updated from the Contextual side panel, the last updated sub source is updated as **Workplace Event Planner**.
- When a reservation is updated from the portal, then the last updated sub source is updated as **Workplace Service Delivery**.

Reservation details view

When you select a reservation in the event planner, the reservation opens in a new tab displaying all the reservation-related details. The page displays the requester details, the current state, and the campus where the reservation is requested on the top-level view.

The reservation details are displayed in the following tabs:

Details

The **Details** tab displays the reservation details specified by the requester on the reservation form while making the reservation. As a reservation planner, you can edit the **Number of attendees**, **Reservable purpose** and the **Cost center** field.

Blocker Reservations

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The tab displays blocker reservations created along with the reservation. Blocker reservations are created for cleanup and preparation if any extra services are requested with the reservation.

Cases

The tab displays the workplace cases created to fulfill the extra services requested with the reservation. If there are any workplace tasks created, a **Tasks** tab appears.

Requested Service Items

The tab displays the service items requested with the reservation.

Approvers

The tab displays the details of the approvers of the reservation.

Invitees

The tab displays the details of the invitees invited to the reservation.

Reservation Recordings

The tab displays the recording details if the reservation includes a virtual meeting link.

From the reservation details page, you can also open the reservation to view it in the Employee Center portal using the **Open reservation** option. If you want the reservation to open on a custom portal instead of Employee Center, you must perform the following actions:

1. Navigate to **System Definitions** > **Script includes**.
2. Search and open **WPCoreUtils**.
3. In the **Script** field, override `getCommonPortalSuffix` function to get the common portal suffix.
4. Click **Update**.

As a reservation planner, you can cancel a reservation if necessary using the **Cancel reservation** option.

Scenario and Building - Views, states, settings, and key features

Create or view a scenario using a stack plan and a floor map view. Scenario planning enables you to allocate spaces and define user assignments efficiently with different views, simple settings, and several key features.

When you create or open a scenario, the scenario is opened in a stack plan view by default. If the building for which you're creating a scenario or viewing the scenario has floor maps configured, you can view the space allocations on the floor map directly. You can work on a scenario only if it's owned by you or if you're assigned as an owner by your colleague.

Stack plan view

A stack plan is a visual representation of space allocations based on their department, cost center, workplace entity or neighborhood. The stack plan displays the different departments, cost centers, neighborhood or workplace entities of your organization in different color codes.

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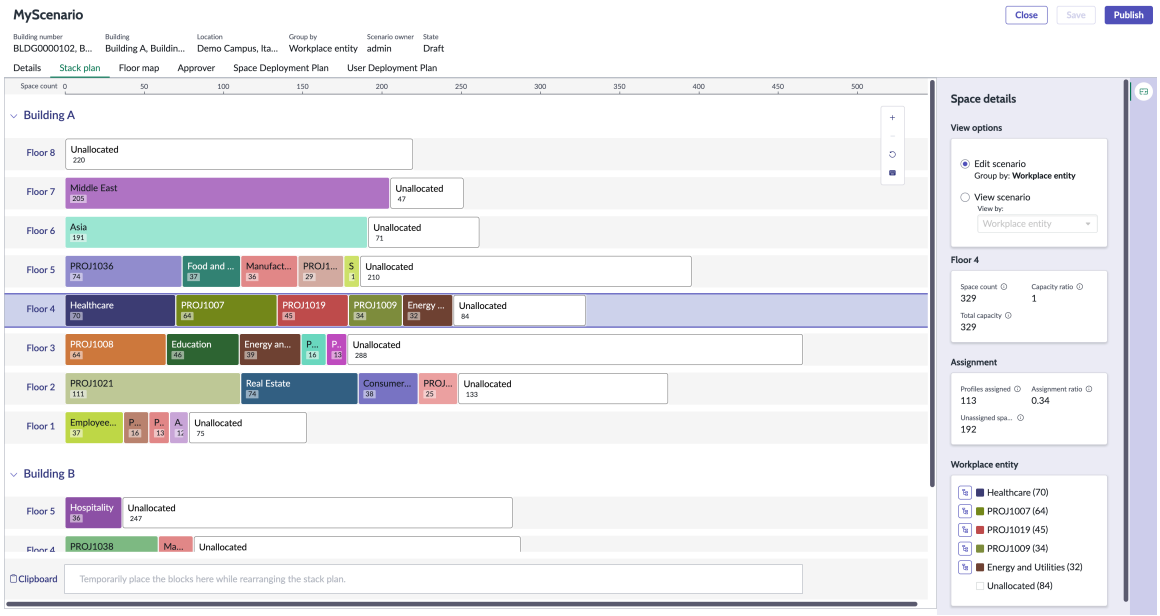
Stack plan view



A stack plan is similar to a graph. The Y-axis of the plan shows the different floors of a building and the X-axis shows the length of the bar, which is determined from the total capacity of the building. For example, if the sum of the capacities of all the spaces is 1000, then the length of the bar is 1000 plus other spaces that are assigned to the selected bar.

When you create a scenario, you must specify on what basis you want to group your space allocations. For example, the basis can be grouped by department, cost center, or neighborhood in the **Group by** field. The stack plan displays the allocations based on this selection. The stack plan is then opened in the scenario mode directly. The scenario mode is the grouping mode that is selected in the **Group by** field. When you open a scenario that is in the Published state to review the allocations, the scenario is opened in its scenario mode by default.

You can change a scenario only if you're the owner and if the scenario is in the Published state. If you open a scenario that is not owned by you, then you can view the plan only in a read-only mode.

In a scenario, you can view all the details related to the building such as its capacity, space count, unallocated spaces, and more. You can change your space allocations view of a scenario by using the **View by** option.

The stack plan view includes the following features:

View or edit space allocations

View space allocations based on departments, cost centers, workplace entity or neighborhood. The spaces on a floor that belong to the same allocation are grouped as a bar. The bars on a floor are color-coded for simple identification. You can view the legend of the color codes in the right panel.

> **Important:** You can view workplace entity-based allocation only in a building stack plan view.

View details

The details panel of a scenario contains the following:

- **View Options**: In this section, you can specify whether you want to edit or view a scenario. From Workplace Space Management version 1.13.0, the view-by types are sorted alphabetically by default. You can change the order or add view types

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from the View by Configuration [sn_wsd_spcmgmt_view_by_configuration] table. For more information, see Create a view-by configuration. The following options are available by default:

- **Edit scenario**: Option to edit the scenario. You can edit only if you're a space planner.
- **View scenario**: Option to view the scenario in read-only mode. By default, the scenario is displayed based on the **Group by** selection that you specified. You can view scenarios based on the following:
  - Assignment type
  - Cost center
  - Department
  - Neighborhood
  - Occupancy status
  - Space functions
  - Space status
  - Space type
  - Workplace Entity

    If you select Workplace Entity, you can specify the entity type to group the spaces.

- **Space/floor/bar details**: The details of a space such as count and capacity.
  - **Space count**: Number of spaces. The value is derived from the values specified in the **Capacity** field of all the space records.
  - **Total capacity**: The total capacity of the space. The values are derived from the capacities specified in the **Capacity ratio** field of all the space records. A capacity ratio can be more than 1 for a space. Which means, a space can have more than a user assigned to it. The length of a stack plan bar is determined based on the total capacity.
  - **Capacity ratio**: The ratio of capacity determined by dividing the **Space count** and **Total capacity** values.
- **Assignment**: Number of users assigned to a space. The values are displayed based on your selection on the plan

  Note: In Workplace Space Management version 1.13.0, user profiles that have location assignments associated to schedule plans are excluded from scenario planning.

  - **Profiles assigned**: Number of user profiles assigned to the building/floor/selected bar.
  - **Assignment ratio**: The ratio of the people assigned to the total capacity of that building/floor/selected bar.
  - **Unassigned spaces**: Number of unassigned spaces to the building/floor/selected bar.
  - **Assigned profiles**: The details of the users who are assigned to the select space or spaces.

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If a scenario is grouped by neighborhood, you can also make user assignments to a neighborhood from the scenario stack plan using the **Edit user assignments** option. You can add a user, remove a user, or update a user to a neighborhood.

If **Neighborhood** is selected as the group by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other group by option, assignments that have the **Location assignment** type are applicable.

- **Legend**: This section depends on the view selected in the **View by** field. For example, if you select Department as the view option, then the legend of all the departments available in the building is displayed.

Change views

Change the view of the bar based on different types. The following view types are available:

> **Note:** From Workplace Space Management version 1.13.0, the view types are sorted alphabetically by default. You can change the order or add view types from the View by Configuration [sn_wsd_spcmgmt_view_by_configuration] table. For more information, see Create a view-by configuration.

- **Assignment type**: View the spaces on a floor based on their assignment type such as permanent or flexible.
- **Cost center**: View the spaces on a floor based on cost centers. The bars are labeled with the different cost centers of your organization.
- **Department**: View the spaces on a floor based on departments. The bars are labeled with different departments of your organization.
- **Neighborhood**: View the spaces on a floor based on the neighborhood. The bars are labeled with different neighborhoods of your organization.
- **Occupancy status**: View the spaces on a floor based on the occupancy status.
- **Space functions**: View the spaces on a floor based on different space functions. The bars are labeled with different space functions of your organization.
- **Space status**: View the spaces on a floor based on their status such as active, future, retired, or temporary. The bars are labeled with the different space statuses.
- **Space type**: View the spaces on a floor based on their space types such as workspace/desk, room, restroom, and more. The bars are labeled with the different space types of your organization.
- **Workplace Entity**: View the spaces on a floor based on the Workplace Entity. After you select the Workplace Entity option, you can also select the type of entity to group the spaces.

Use keyboard shortcuts

Click the Keyboard shortcuts icon( ) to view the shortcuts that you can use during scenario planning. You can use keyboard shortcuts such as:

- Left/right keys: To navigate between stack plan bars in a row (floor).
- Up/down keys: To navigate between to the previous or next row (floor).

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- Space key: To view the additional details of the highlighted stack plan bar in the tooltip.
- Enter: To select the highlighted stack plan bar.

View the details of an allocation

See the details of an allocation on the plan in the details panel that is displayed on the right side. The details on the right panel of a scenario depend on the selection that you make on the plan and the **View by** option.

- If you select a floor, the right panel displays details such as the floor name, space count on the floor, total capacity ratio of the floor, capacity of the floor, profiles assigned, assignment ratios, unassigned spaces, and department/cost center allocated on that floor. The bar is displayed based on your view selection. The details of the bar is displayed in the bottom of the right panel. For example, if you select **Space type** as the **View by** option, the bar is displayed based on space types and the details of the space types that are assigned on a floor are displayed on the bottom of the right panel.
- If you select a bar, for example Department ABC, the right panel displays details such as the bar name, which is Department ABC, space count of Department ABC, capacity ratio of Department ABC, total capacity of Department ABC, profiles assigned to Department ABC, assignment ratio of Department ABC, unassigned spaces in Department ABC, color code of Department ABC.

  When you select only a bar (Department ABC), you can change the space count, and also assign that bar (Department ABC) to another floor using the **Space count** and **Assign to** fields.

- If you have not made any selection on the stack plan, then the overall details related to the building are displayed with the same fields as above.

View unallocated spaces

Check unallocated spaces on a floor. Unallocated spaces are those spaces that aren't assigned to any cost center, department, workplace entity or neighborhood. Based on the unallocated spaces you can increase or decrease the number of spaces to a department. If you allocate spaces more than the unallocated space count, then the bar doesn't allow you to make the allocation.

> **Important:** You can view workplace entity-based allocation only in a building stack plan view.

Allocate a bar to another floor

Move a bar from one floor to another. For example, move Department ABC from Floor 1 to Floor 5.

Move a bar to the clipboard

Move a bar to the clipboard if you're uncertain about its allocation. A clipboard is similar to a working space used to hold bars temporarily.

Merge bars that are split

Combine the bars that are split in different floors to one floor, by merging. The spaces are grouped automatically.

View the capacity or capacity ratio

Check the capacity or capacity ratio of a building, floor, or a bar.

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Building view

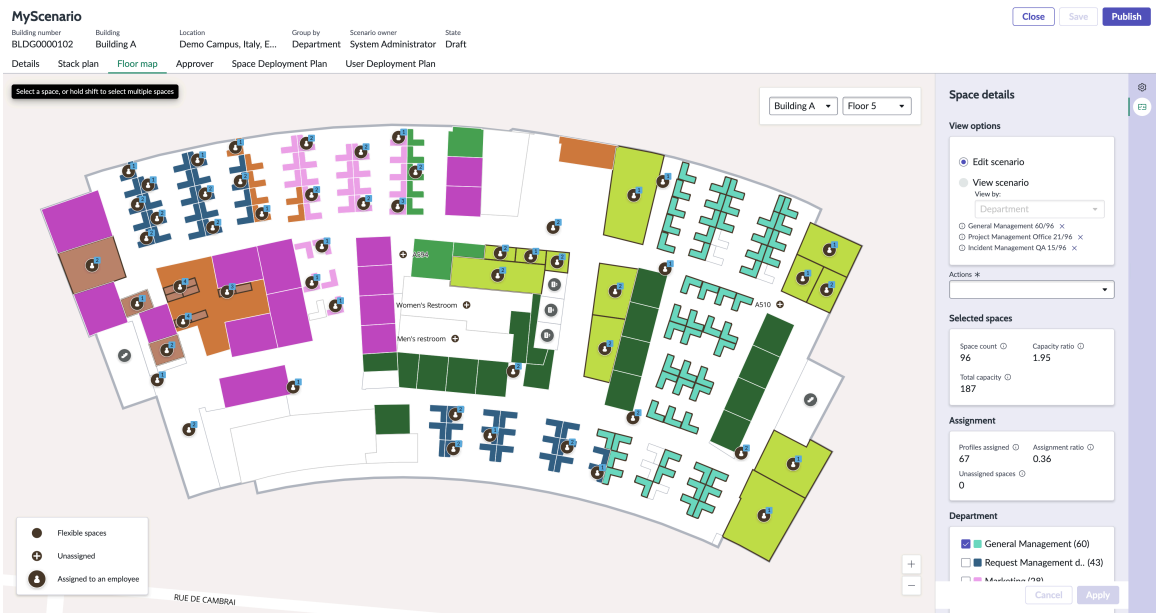
Not just during scenario planning, but, you can also view a building's spaces and their allocation, and various space details on a stack plan at any time. On the Space optimization dashboard, you can select the building that you want to view. The building is displayed on a stack plan. For more information, refer to View or edit space allocations of a building. The stack plan displays the floors of the building and the allocations like how it is displayed for a scenario. In a building view, you can perform the following actions exclusively:

- You can view the spaces of a building based on the workplace entities that they are associated with. The **View by** option in a building view displays an addition option **Workplace entity** using which you can view the spaces. Additionally, after selection, you can specify the entity type based on which the spaces must be displayed.
- When you select a workplace entity-based allocation on the stack plan, the details of the hierarchy of that selected space allocation and the number of spaces assigned to each parent-child hierarchy are displayed in detail.
- You can edit user assignments of a neighborhood allocation in a building view. You can add, remove, or change the allocation of a user. For more information, refer to Edit or view a building's spaces based on workplace entities.

Scenario - Floor map view

View the space allocations on a floor using the floor map view. The floor map view for a floor is available only if the floor map is configured using Workplace Indoor Mapping. The floor map view makes its easier for you to view the allocations, user assignments, department/cost center/ workplace entity/neighborhood movement on a floor with easy actions. Select the **Floor map** tab on the scenario plan to view the floor map.

Floor map view



The Floor map view provides you with the following features:

View the individual allocation

You can view the allocations of individual spaces on the map directly. The spaces are colored based on the allocation that they're assigned to. The legend is displayed on the right panel.

View any scenario

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You can view any scenario at any time. When you open a scenario opened by others, you can view the allocations and details in a read-only mode. A scenario is opened it the scenario mode that is configured on it. You can hover over the spaces on the floor map to view the details in a tooltip.

Zoom

Zoom in or zoom out on the map to view the allocations.

Change floors

You can select different floors of the building using the floor selection option available on the map. If you select a floor on the stack plan and then open the Floor map view, then the floor map of that floor is displayed. If you have not made any selection on the stack plan, then the Floor 1 of the building is opened by default.

Select a space

Select a space on the map directly and view the details of that space on the right panel. You can select a single or multiple spaces by drawing a circle (lasso) around them or by using the Shift key on the keyboard. The details on the Space details panel are displayed based on your selection.

The spaces that are flexible, assigned, and unassigned spaces are highlighted with different color codes. The legend of these color codes is displayed on the map.

While editing a scenario, you can select a check box from the space details section to select all the spaces that have the same color code.

If a space is assigned to any user, an avatar icon is displayed with the number of users assigned to that space.

Share a floor or space

To share a floor, select the floor on the map, then select the copy link () icon from the Space details pane. Make sure that no spaces are selected.

To share a space, select the space on the map, then select the copy link () icon from the Space details pane. You can only share one space by using the link.

View details

You can view the following details on the right panel:

- **View by**: Option to change the view of the map. The view options are determined from the space types available on a Space record. The spaces are highlighted on the map based on your selected view.
- **Actions**: This field is displayed only if you've selected a single or multiple spaces on the floor. The following options are displayed in the field:
  - **Allocation**: Option to make allocation-related changes such as adding, changing, or removing an allocation.
  - **Assignment type**: Option to change the assignment type such as changing a space from permanent to flex or vice versa. You can also remove the existing user assignment.
- **Space/floor details**: The details of a space such as count and capacity are displayed.
  - **Space count**: Number of spaces. The value is derived from the values specified in the **Capacity** field of all the space records.
  - **Total capacity**: The total capacity of the space. The value is derived from the capacities specified in the **Capacity ratio** field of the space records. A capacity

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ratio can be more than one for a space. Which means, a space can have more than one user assigned to it. The length of the bar is determined based on the total capacity.

- **Capacity ratio**: Ratio of capacity determined by dividing the Space count and Total capacity values.

- **Assignment**: Number of users assigned. The values are displayed based on your selection on the plan

> **Note:** In Workplace Space Management version 1.13.0, user profiles that have location assignments associated to schedule plans are excluded from scenario planning.

  - **Profiles assigned**: Number of user profiles assigned on the building/floor/selected bar.
  - **Assignment ratio**: Ratio of the people assigned on the total capacity of that building/floor/selected bar.
  - **Unassigned spaces**: Number of unassigned spaces in the building/floor/selected bar.

  If **Neighborhood** is selected as the view by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other view by option, assignments that have the **Location assignment** type are applicable.

- **Legend**: This section depends on the view selected in the **View by** field. For example, if you select Department as the view option, then the legend of all the Departments available on the floor is displayed.

Adjust map settings

Change the map settings. You can switch between Floor plan view details and Map settings details on the right panel. The floor plan details displayed on the panel depend on the map settings. The following settings are available:

- **Assigned to**: Option to view the user or users to whom the space is assigned.
- **Assignment type**: Option to view the assignment type of the space that is flexible or permanent.
- **Opacity %**: Opacity of the colored spaces on the map. You can reduce the opacity if some map elements are hidden due to the colored spaces.
- **Show base map**: Option to view spaces on the map as defined in the Map Studio.

Change space allocations

When you move a department to a floor, the spaces assigned to that department are grouped with the existing spaces of that department on the floor. You can view these space allocations on the floor department wise. You can also select a single space or multiple spaces of that department and allocate it to another department using the **Actions** option.

Building - Floor map view

You can also view a building stack plan or a floor map at anytime and make changes specifically on the building. You can perform actions directly using the floor map of the building if the building has a Workplace Indoor Mapping floor map configured.

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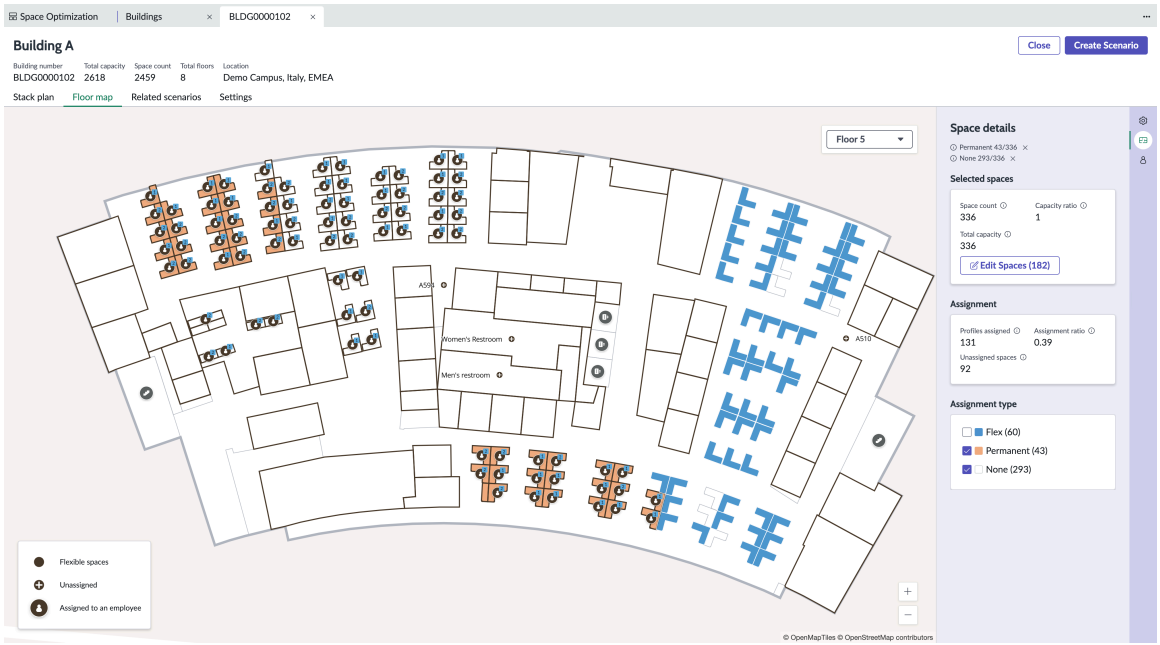
Similar to the scenario, the stack plan view of a building also enables you to perform space allocations, view the spaces on the floor based on various options.

The **Floor map** view of a building enables you to perform map based space administration. For more information, refer to Map based space administration.



On a floor map, you can do the following:

- You can view the spaces of the floor directly. From Workplace Space Management version 1.13.0, the view types are sorted alphabetically by default. You can change the order or add view types from the View by Configuration [sn_wsd_spcmgmt_view_by_configuration] table. For more information, see Create a view-by configuration. The following categories are available by default:
  - **Assignment type**
  - **Cost center**
  - **Department**
  - **Neighborhood**
  - **Occupancy status**
  - **Space function**
  - **Space status**
  - **Space type**
  - **Workplace Entity**

    When you select **Workplace Entity**, an additional field **Workplace Entity Type** is also displayed in which you can specify the entity type, based on which you want to view the spaces.

  Note: In Workplace Space Management version 1.13.0, user profiles that have location assignments associated to schedule plans are excluded from the building view.

  For more information, refer to View or edit space allocations of a building.
- You can edit the spaces on a floor. For more information, refer to Edit a building's spaces using a map.

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- Assign or unassign an employee from a space. Move employees on a floor or to a different floor using the map.
- You can also change the opacity of the colored spaces in the **Map Settings** pane. Changing the opacity is helpful if some elements on the map are hidden due to the color.
- You can view the base map (as defined in the Map Studio) from the **Map Settings** pane by selecting **Show base map**.

While viewing or editing spaces, you can select a check box from the space details section to select all the spaces that have the same color code.

Related scenarios

The Related scenarios tab appears when you open a building using the Space Optimization module. All the scenarios related to the selected building are listed.

Details related to scenarios such as the name, state, owner, date when it was created, group for which it's created and more are displayed. You can refresh the list, edit the columns, and apply filters.

Scenario states

A scenario, since its creation to the deployment, undergoes different state changes based on the actions implemented on it. Based on the state of a scenario, you can share it with your colleagues or stake holders to review the plan and implement it on the main production data.

A scenario has the following states:

- **Processing**: A scenario is set to **Processing** when its creation is in process. Also, if you're copying an existing scenario, then during the copying process, the newly created scenario is set to **Processing**.

  Also, at any time, when a scenario is saved, the state of the scenario will be set to **Processing** when the saving process in running.

- **Draft**: A scenario is set to Draft when it's ready to use, that is, when it's being worked on. During this state, only the owner of the scenario can view it.
- **Ready**: A scenario is set to Ready when it's published. When a scenario is published and after the scenario is set to the Ready state, you can share it with your colleagues or stake holders for their feedback. The scenario is available only in read-only mode to others.
- **Awaiting approval**: A scenario is set to Awaiting approval when it is sent for approval after publishing. When a scenario is sent for approval, the scenario can no longer be edited unless the state changes to Rejected.
- **Rejected**: A scenario is set to Rejected if an approver has rejected the scenario. When the scenario is rejected, you can implement the changes suggested by the approver using their comments and send it for approval again.
- **Approved**: A scenario is set to Approved if an approver approves the scenario. When a scenario is approved, you can no longer edit a scenario. You can only deploy a scenario.
- **Deployed**: A scenario is set to Deployed when it's deployed to the main production data. You can't make any changes to a deployed scenario. To make any changes, you must create a copy of that scenario and make changes.
- **Archived**: A deployed scenario is set to Archived if it's older than six months.

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Settings

The Settings tab appears when you open a building directly using the Space Optimization module. The Settings tab enables you to apply the space qualifying filter on the spaces displayed on the stack plan. You can apply a filter based on what type of spaces or how you want to see the spaces.

For example, if you want to see all the spaces of type workplace/desk then apply the Space type filter. In the Stack plan tab, these spaces are displayed based on the view that you've selected in the **View by** option.

Approver

The Approver tab displays details of all the approvers who are configured to approve a scenario. The Approver tab displays details such as the approvers who are allowed to approve, the state of the approval, the comments related to the approval and the time of approval. After you send a scenario for approval, if the scenario is rejected by the approver, you can view the details of the rejection in the **Comments** of the Approver tab and implement the changes.

The application provides a default approval definition **Scenario Plan Approval**, in which workplace managers are configured as approvers for scenarios. You can create a new approval definition or edit the default defintion. To create a new approval definition, refer to Create an approval definition.

Note: To add an approver to the approval definition, the approver must be configured in the performer criteria. To do so, refer to Create a workplace performer criteria.

Space Deployment plan and User Deployment plan

The Space Deployment plan and User Deployment plan tabs appear when you are creating a scenario. The changes that you make on a scenario are logged in the respective deployment plans. After you save the changes made on the stack plan, the plan displays each change with the changed details.

Space Deployment Tab: The plan displays the allocations and space assignment type changes performed on the scenario.

User Deployment Tab: The plan displays the user assignment-related changes such as Add, Update, and Delete performed on the scenario.

After publishing the changes, and after finalizing the space allocations, to execute it to production, you must deploy the changes. The plan enables you to deploy the changes using the **Deploy** option.

After the scenario is deployed, a workplace case is created for every change. After the deployment, additional details such as the workplace cases associated with each change are displayed in the deployment plans. The following workplace move cases are created for each change accordingly:

- Workplace User Assignment and Move Service via Scenario Planning: Workplace move case created to change the user assignment and move the space.
- Workplace Assignment Type Service: Workplace case created to change the assignment type of a space.
- Workplace Allocation Change Service: Workplace case created to change the space allocation.

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Space request approvals, states, actions, and key features

As a space planner, execute the space allocation requests raised in the organization using the Workplace Central Space Optimization dashboard. Using the Workplace Central Space Optimization dashboard to avoid multiple tasks about checking the availability, allocating spaces manually, and other process involved while space planning.

Functionality

The Workplace Service Portal enables workplace managers and other workplace users to raise a space recommendation request by specifying their requirements. The application generates various space plan options based on their specifications. When a space request is submitted, a workplace case is created in the application. The Workplace Central Space Optimization makes it easy for you, as a space planner to view only those workplace cases specifically generated from a space request.

As a space planner, you only have a few actions to perform to deploy a space plan. The application applies various algorithms on the location specified by the requester and generates multiple space plan options. The requester is provided with these space plan options to make a selection and submit. This pre-planning of space allocation makes it easier for you, as a space planner to deploy the space plan.

The Space Optimization dashboard provides you the metrics of the total number space requests raised and also view details of each space request. You can also view the details applying various filters and also based on the building for which it is requested for.

On the Space Optimization dashboard, you can view space requests using any one of the following options:

- In the **Scenarios** metrics board, select **All space requests**.
- In the **Space requests** section, select **View all** to view all the space requests.

Approvals

If a space assist request requires approval, you can approve them using the Workplace Core approval configuration. You can approve a space assist request of only those users to whom you are assigned as a manager.

Space request views

When you open a space request workplace case, a separate tab is opened with various details. You can view the details in different views.

Request details

The space request opens in the Request details view by default. In the Request details, the details are split in three different panels as follows:

1. **Workplace case and Variables**: In the first panel, the Workplace case details and the variables provided by the requester is detailed.
   - In the Workplace Case section, you can view the description of the request. You can also assign the space request to another assignment group or a user using the **Assignment group** and **Assigned to** field.
   - In the Variables, section, you can view all the details specified on the form by the requester.
2. **Compose and Activity**: In the second panel, you can add comments and activities performed on the space request since its creation.

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- In the Compose section, you can add comments and work notes in the request. Comments are also displayed to the requester whereas work notes are displayed only to the space planners working on the space request.
- In the Activity section, you can view all the details related to the actions performed on the space request, such as state changes, approvals, work notes and all.

3. **Attachments and Templates**: In the third panel, you can select two different views, that is, view or add attachments or view workplace case templates. You can select these options using the extreme right panel.

Space plan

In the **Space plan** tab you can view the space plan option that is selected by the requester. You can also see the space plan on the floor map. The floor map is visible only if the floor has a floor map configured using the Workplace Indoor Mapping application and if you have installed the Indoor mapping component.

- The space plan also displays high-level information of the floor, building, and campus involved in the form of pills.
- The space plan provides detailed information of the spaces, floor, building, campus, site, and the region which is used for the allocation.

Important: If the requester has not made any option selection, the **Space plan** tab does not display any details.

Approvals

In the **Approvals** tab, you can view the approver details of the space request.

Space Deployment plan

The **Space Deployment plan** displays the detailed information related to the allocation, the floor where the space is allocated, the type of change made in the plan, the current value and the scenario value. When you deploy the space plan, a workplace case is created and executed for each allocation. Until all the workplace cases are in progress, the deployment is not considered as done.

User Deployment plan

The **User Deployment plan** displays the detailed information related to the neighbourhood user assignment-related changes if the scenario is grouped by neighbourhood.

Floor map

In the Floor map view, you can view the floor map of the floor where the space plan is planned. The floor map is visible only if the floor has a floor map configured using Workplace Indoor Mapping and if you have installed the Indoor mapping component. You can perform the following actions on a floor map:

- Switch the locations using floor, building, and campus filters.
- Zoom in and out on the map. You can also double-click to zoom in.
- View the legend associated with each department on the right panel.

Space request states

A space request since its creation undergoes several state changes. Based on the state of the request, you can perform actions and deployment.

A space request has the following states:

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- **Draft**: When a space request is created using the Workplace Service Portal, it is initially set to the Draft state for a few seconds and then changes to the Ready state.
- **Ready**: After the request is created and the space plan options are still under generation, the status is set to the Ready.
- **Work in progress**: After the options are generated and available to the requesters for selection, the status is set to Work in progress. The status is set as Work in progress until the requester selects an option.
  - If the requester selects an option, then the request changes to the next state.
  - If the requester selects the None option from the list of options provided, then the request is closed and the state is set to Closed complete.
- **Awaiting approval**: If the requester selects an option and submits the request, one of the following actions is performed:
  - If the requester's profile requires a manager approval, then the request is sent for an approval and the state is set to Awaiting approval.
  - If the requester's profile does not require any approval, then the state is automatically changed to Approved.
- **Closed incomplete**: When the request is sent for approval and if the approver rejects the request, that is, if the approver rejects the selected space plan, then the state changes to Closed incomplete.
- **Approved**: If the approver approves the space request, then the state is changed to Approved. You can only deploy space requests that are in the Approved state. Also, the **Space Deployment plan** and the **User Deployment plan** displays the space selected in the space request if the request is Approved.
- **Deployment in progress**: When you deploy the space plan selected in the space request, the state of the request changes to Deployment in progress. The following actions are performed when a request is in the Deployment in progress state:
  - For every allocation, a workplace case is created and implemented.
  - The deployment process is successful only if all the workplace cases are implemented successfully, that is, if all the cases are closed with the Closed complete state.
  - The deployment process is unsuccessful if any one workplace case is not implemented successfully, that is, if any one case is closed with the Closed incomplete state.
- **Closed complete**: If the deployment is successfully implemented, then the space request is closed and the state is set to Closed complete. If the deployment fails, then the space request is closed and the state is set to Closed incomplete.

Move management key features and actions

As a Move manager, fulfill move requests efficiently by logically grouping them in to move projects using the Workplace Central Move management workspace.

Move Management workspace

The Move management workspace is a one stop workspace where you can perform multiple actions on a move request raised by an employee or generated from a scenario deployment. The workspace enables you to manage your workload by creating move projects and monitor these requests by their expected start and due date.

The workspace has several key features such as move requests-related metrics, visual representation, detailed views, and also the option to create a move project. The Move management displays information in the following categories:

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- **Move management**: Displays metrics of your active move projects, move requests, and move tasks. It also provides a visual representation of the planned and unplanned move requests, states of requests and active projects.
- **Create project**: Option to create a move project. For more information, refer to Create a move project from existing move requests.
- **Move management**: Lists the details of the following:
  - Details of all the move projects with their planned start and end date, their current state, and the assigned user.
  - Details of all the move requests with their current state, the requested move date, the expected start, and the due date.

For detailed information about move projects, its features, and various states, refer to Move project views, actions, and states.

Move request metrics

As a move manager, you can view the metrics associated with the active projects that are assigned to you, the number of move requests and move tasks. You can select each tile to view more details in a list view. In the Move management metrics section, the following metrics are displayed:

- **My active projects**: Number of active projects that you're currently working on.
- **Move requests**: Number of active move requests associated with the active move projects.
- **Move tasks**: Number of active move tasks created to fulfill the active move requests.
- **Planned vs unplanned requests**: Visual representation of planned and unplanned move requests in a Pie chart. Unplanned requests are those requests that don't have an **Expected start** or **Due date** specified.
- **Move requests (pie chart)**: Visual representation of move request states in a Pie chart.
- **My active projects**: Visual representation of each move project and the number of cases associated to each project.

Move project details

Under the Move management details section, you can view the details of all the move projects created in the organization. You can view details of the project such as the name of the project, current state, planned start, and end date and the assigned user. You can select a move project and work on it separately in a different tab.

At a time, the workspace displays up to five move projects. To view all the move projects, select **View all** at the end of the list.

- When you select **View all**, the list is opened in a separate tab where you can view all the move projects created in your organization with their details.
- You can also perform the following actions on the list:
  - **Create**: Create a move project.
  - **Delete**: Delete one or more move projects if they're no longer required.

    ⚠ **Warning:** Deleting a project will only remove the project and not delete the move requests associated to it. It unlinks the move requests from the deleted move project.

  - **Refresh** the list.

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- **Edit** the column.
- Add or remove filters.
- You can select a move project to view the details in a separate tab. On selection, the workplace move project is opened where you can view the project details and also edit any information such as the state if necessary.

Move request details

Under the Move management details section, you can view the details of all the move requests created in the organization. You can view the details such as the request number, state, requested for user, request move date, expected start and due date, and the project to which the request is associated. You can select a move request to open it in a different tab.

At a time, the workspace displays up to five move requests. To view all the move requests, select **View all** at the end of the list.

- When you select **View all**, the list is opened in a separate tab where you can view all the move requests created in your organization with their details.
- You can also perform the following actions on the list:
  - **Refresh** the list.
  - **Edit** the column.
  - Add or remove filters.
- You can select a move request to view the details in a separate tab. When selected, the workplace move case record is opened where you can view the request details and also edit any information if necessary.

Move project views, actions, and states

As a move manager, create, track, and work on move projects to fulfill multiple move requests at a time. The move project enables you to work using a schedule view, which is faster than opening individual move requests.

A Move project enables you to logically group move requests based on the specified conditions. You can view all the move requests under a single move project.

Using the Move project's Schedule view, you can:

- Verify the user who raised the move request.
- View the current state of that move request.
- View and edit the expected start and due date by when the request must be fulfilled. The dates are displayed on a calendar.
- Check the number of move requests to be fulfilled every day.
- Schedule a move request to another date by simply dragging the bar of the request.

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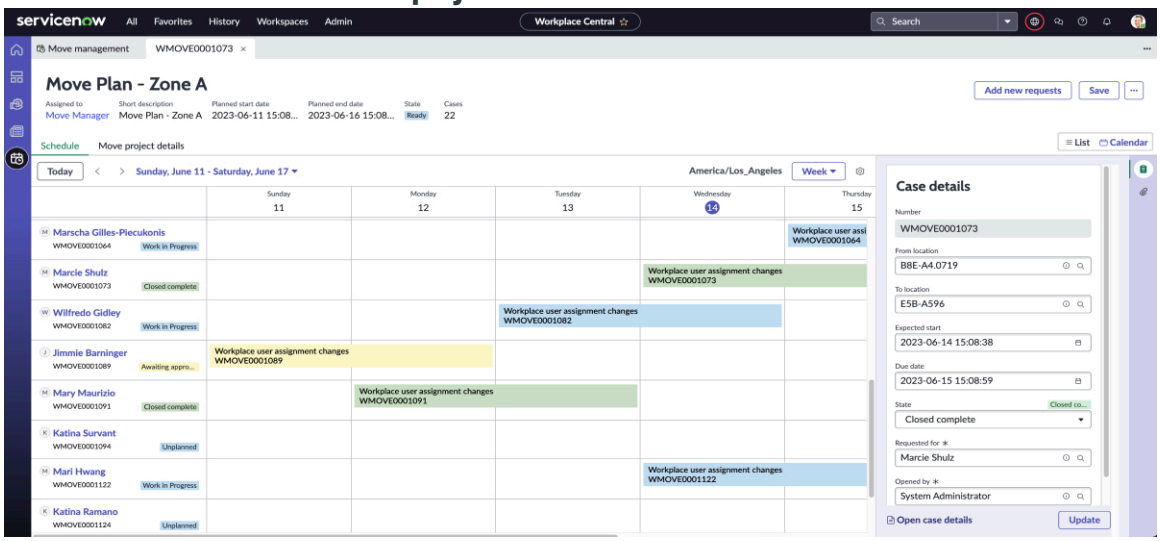
Move scheduler view of a move project



Move dates

The following process explains how the start and end dates of a move project are determined:

1. An employee or a move manager raises a move request. They specify a date in the **Requested move date** field.
2. When the move requests are collated in the Move Management workspace, they're displayed with the **Requested move date**, **Expected start**, and **Due date**.
3. The planned start and end date of the move project are set based on the minimum **Expected start** date and the maximum **Due date** from the move requests that are associated with the project.

Move project views

When you select a move project to work, it's opened in a separate tab. It's opened in the schedule view by default. You can edit and view the move project details in different views.

Schedule

The default view when you open a move project. The schedule view is an interactive calendar view with displayed according to your local time zone. You can also switch to a list view using the list options tab (List).

The view is categorized based on the following:

- **Move requests**: The first column displays the move request details such as the name of the requester, move request number, and its current state.
- **Calendar**: The main display of the view contains the event details in a calendar view sorted across a set of dates. The minimum planned start date is the first date of the calendar and the maximum planned end date is the end date of the calendar.
  - Each calendar day is displayed with the number of move cases that are expected to be fulfilled.
  - The calendar displays the move request as a bar on the calendar. To schedule the move request on a different day, drag the bar to the required date on the calendar.

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- The calendar displays the dates based on your current local date. It displays the date and time based on your time zone.
- If a move request doesn't have any **Expected start** or **Due date** specified, then the calendar doesn't display any bar for the request.
- You can switch between a weekly view and a monthly view. By default, the calendar is displayed in a weekly view.
- When you select a move request bar on the calendar, a Case details panel is displayed. You can view case details like the **To location**, **Expected start**, **Due date**, **State**, and **Request for**.

- **List**: You can change your view from a calendar view to list view using the List options tab (

). View all the move requests under the move project as a list.
  - You can view the details of the request like the request number, state, relevant dates, and the move project.
  - You can remove a single or multiple move requests by selecting them from them list.
  - You can also assign one or more move requests to yourself by using the **Edit** option.

Move project details

The Move project details tab contains details such as the name of the project, the move manager who is assigned to the project and the state of the project.

- You can change the state of the project that is assigned to you.
- You can reassign the project to yourself by changing the **Assigned to** field.
- You can track the activities such as state changes and user assignment changes performed on the project in the Activity section.
- You can add work notes in the project using the Compose section. You can enter your names and select **Post Work notes (Private)**.

Attachments

You can view any attachments in the **Attachments** section.

Add move requests

At any time, you can add more move requests to a move project while the project is still in the Work in progress state. Select the **Add new requests** to add move requests. You can add multiple move requests to a project.

Move project states

A move project goes through the following state changes:

Initializing

When the move project is created while deploying a scenario, the state is set to **Initializing**. This state is set when a move project is created and the move requests are still being created under it.

Ready

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When a move project is ready with all the move requests that matched the conditions, the state of the project is set to **Ready**.

Work in progress

When you start working on the project, you can set the state to **Work in progress**.

Closed complete

After you fulfilled all the move requests of the move project, you can change the state to **Closed complete**. You can set it to **Closed complete** only if all the move requests that are assigned to the project are set as **Inactive**.

A project that is in the **Closed complete** state can't be edited. You can only edit the **Assigned to** and the **State** fields.

Closed incomplete

If you want to close a move project for some reasons irrespective of the status if the move requests assigned to it, you can change the state to **Closed incomplete**. Changing the state of the project doesn’t impact the state of the move requests assigned to the project.

A project that is in the **Closed incomplete** state can't be edited. You can only edit the **Assigned to** and the **State** fields.

Cancelled

You can cancel a move project at any time by changing the state to **Cancelled**. Changing the state of the project doesn't impact the state of the move requests assigned to the project.

A project that is in the **Cancelled** state can't be edited. You can only edit the **Assigned to** and the **State** fields.

Case Management - Key features, Actions & Case details

The Workplace Central Case management workspace is an all-in-one workspace using which a case manager can manage hundreds of workplace cases created in the organization.

Case management - Key features

As a case manager, monitor the large number of workplace cases incoming daily at any time using the workspace. Check the number of active workplace cases, the cases that have breached SLA and those that are critical. The workspace enables you to focus on priority cases by providing you a categorized display. The workspace enables you to perform the following:

- You can analyze the number of cases opened and closed on a weekly basis. You can know the monthly volume of cases based on the workplace services.
- You can view the case details in an organized display where you can focus on the most important actions and details to help you resolve the case quickly. You can edit a case, update case details, view the details of the employee who has requested the case and also know the location specified in the case on a floor map.
- As an admin or case admin, you can cancel a case if it’s no longer required. Similarly, as a move admin, you can cancel a move case and as a maintenance admin you can cancel a maintenance case.
- In case of a move cases, you can view the 'From location' and 'To location' on the map. You can know the date by when the move must be implemented.
- In case of a maintenance cases, you can view the details related to the asset specified and know the location of the asset specified on the map. You know the details such as the product model and asset-related details.

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- When there are hundreds of cases like regular workplace cases, move cases and, maintenance cases, you can sort and apply a filter on the cases to work on them based on priority.
- You can export the list of cases if necessary.
- You can track the total time spent on a case or task. The timer starts at zero, tracks time until the record is saved or closed, and resumes when revisited. You can also manually adjust, pause, or resume the timer.

The landing page of the workspace is categorized as follows:

- **Overview**: The **Overview** section displays the metrics of the cases. You can view the number of cases under various categories and also view a graph of the volume of cases.
- **All active cases**: The **All active cases** section displays a detailed list view of all the currently active cases including the normal workplace cases, move cases, and maintenance cases.

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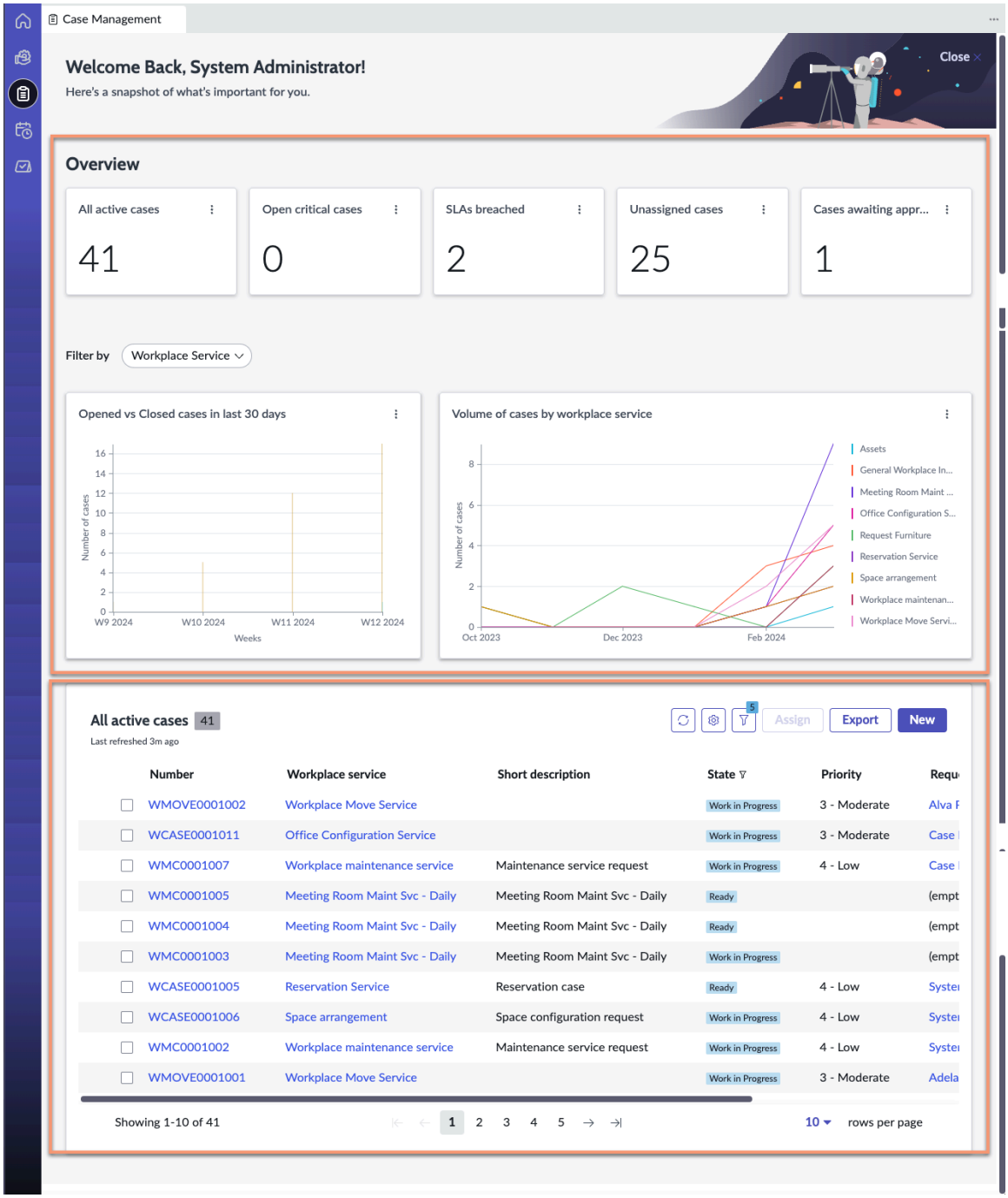

Case management - Metrics (Overview)

The workspace displays the metrics of all the workplace cases under the **Overview** section. The **Overview** section displays the following information:

Metrics

The metrics section displays the following case numbers in cards:

- **All active cases**: Displays the number of active cases currently requested in the organization. The number includes the cases that are in Draft, and other statuses except Cancelled, Closed incomplete and Closed complete.
- **Open critical cases**: Displays the number of critical cases that are currently open.
- **SLAs breached**: Displays the total number of cases that have breached SLAs that is the cases that have crossed the deadline to be resolved.

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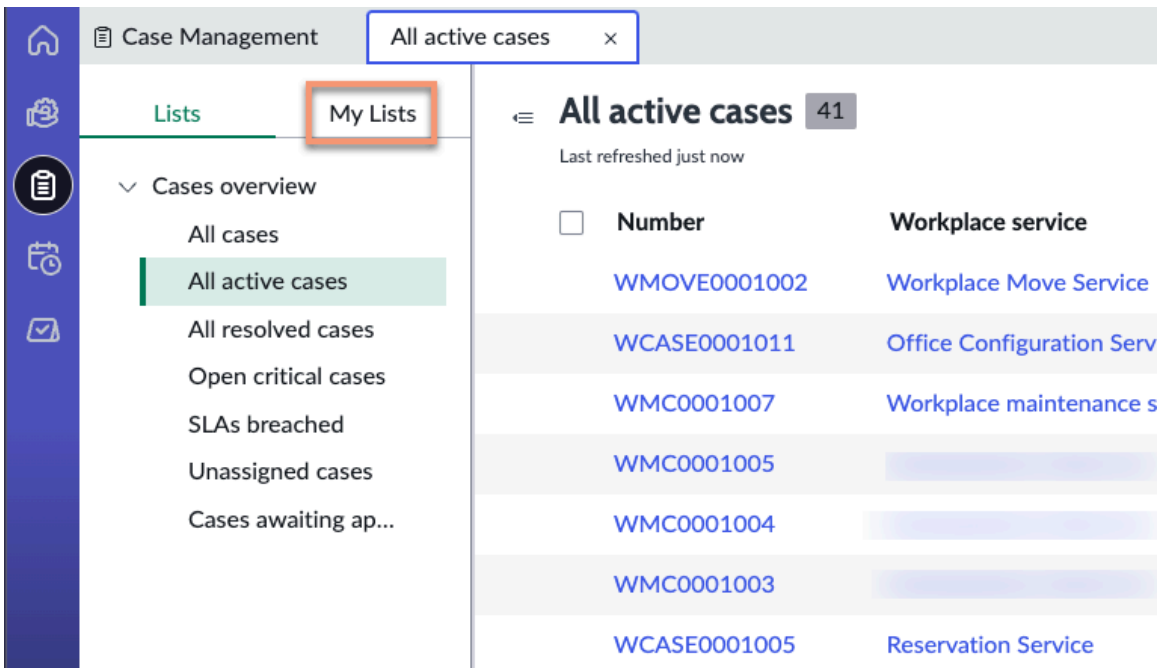
- **Unassigned cases**: Displays the total number of unassigned cases.
- **Cases awaiting approval**: Displays the total number of cases that are awaiting to be approved.

You can select the metric card to view a detailed list of the cases. The case numbers are displayed as WCASEXXXX for workplace cases, WMCXXXX for maintenance cases and WMOVEXXXX for move cases same as in the Workplace Case Management application. In the list view, you can perform the following actions:

- Refresh the list and edit the columns of the list.
- Sort the list base don how you want to view them.
- Copy the URL to the clipboard.
- Filter the list based on various conditions and view the filtered conditions in a side panel. You can also get an advanced view of these filters using the **Advanced view** option.
- Export the workplace cases into the desired format using the **Export** option.
- Create a workplace case using the **New** option. For more information, refer to Create a workplace service case. Instead of using the Workplace Service Portal to submit a workplace service request on behalf of an employee for any other reason, you can directly raise a request using the Case management workspace.
- Assign the case to a user using the **Assign** option.

When you open the list view, the left panel displays a list view of the above metric cards. Additionally, the list view also enables you to view **All cases** and **All resolved cases**. You can also switch to the **My Lists** tab in the panel and create a custom list based on what other metrics you want to view using the **Add new list** option. For more information, refer to Create your own list to view case metrics.



Graphs

The workspace also displays a graph with the volume of cases based on workplace services. You can also apply additional filters based on how you want to view them.

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By default, the graphs are displayed with the filter set as **Workplace Service** only. The page displays the following graphs:

- **Opened Vs Closed cases in last 30 days**: Displays the total number of cases opened and closed in the past 30 days in a week-based view. You can select the graph to view the details of the cases.
- **Volume of cases by workplace service**: Displays the total volume of cases based on workplace services from the past six months (including the current month). You can select the graph to view the cases associated with the selected workplace service.

Case management - List view

You can view a detailed list of all the workplace cases currently active in the application in the **All active cases** section. The list view displays the cases as WCASEXXXX for normal workplace cases, WMCXXXX for maintenance cases and WMOVEXXXX for move cases. You can view the following details in the list view:

- The workplace case number
- The workplace service using which the case was requested
- A short description about the case
- Priority of the case
- Employee for whom the case is requested for
- Date when the case was requested

On the list, you can perform the following actions:

- Refresh the list.
- Edit the columns of the list based on what information that you want to view.
- Apply filter conditions on the list and also change whenever needed.
- Assign a single or multiple cases to another user using the **Assign** option.
- Export the cases to the desired format using the **Export** option.
- Create a workplace service case at any time using the **New** option. Instead of using the Workplace Service Portal to submit a workplace service request on behalf of an employee for any other reason, you can directly raise a request using the Case management workspace.

Case details page

When you select a case to view its details, the case details are displayed in a separate tab. The case details page displays the details in an organized format and in various sections.

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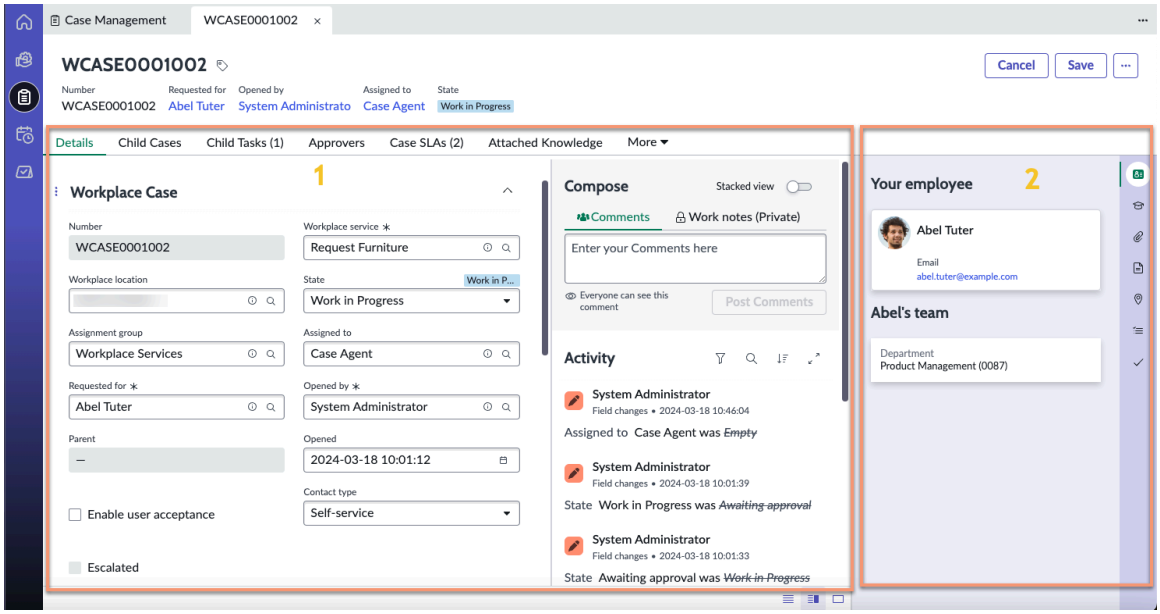

The case details are categorized in the following views:

(1) Form-based view

When you open a case, the basic details of the case such as the case **Number**, **Requested for**, **Opened by** and current **State** of the case are displayed on the header. The details of the case are displayed in a form-based view same as displayed in the Workplace Case Management application. The form enables you to view the following information related to the case:

Details

By default, the page displays the information under the **Details** tab. The **Details** tab displays the workplace case information entered by the requestor. All the form fields with the details are displayed.

- You can view details such as the **Workplace service** using which the case was requested, the **Workplace location**, **Assignment group**, **Assigned to** user, detailed **Description**, **Items at the location** and more.
- For move cases, you can also view the details such as **From location**, **To location**, **Reason** for move.
- For maintenance cases, you can also view the details such as the **Product model**, **Enterprise asset**.

In the **Details** view, you can add comments in the **Compose** panel and post it on the case. You can also add private work notes.

The panel also displays all the activities performed on the case in the **Activity** section of the panel.

Child cases

The **Child cases** displays the child cases created with the workplace case. You can view details of the child cases such as the **Number**, **Short description**, **State**, **Assigned to** user, **Workplace task type**, **Workplace location** and more. You can edit the columns, refresh the list and apply filters on the cases.

You can also create a child case if necessary using the **New** option. To create a child case, refer to Create a child case and a child task.

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Child tasks

The **Child tasks** displays the child tasks created with the workplace case. You can view details of the child task such as the **Number**, **Short description**, **State**, **Assigned to** user, **Workplace task type**, **Workplace location** and more. You can edit the columns, refresh the list and apply filters on the tasks.

You can also create a child task if necessary using the **New** option. To create a child task, refer to Create a child case and a child task.

Approvers

The **Approvers** displays the approvers of the case.

Case SLAs

The **Case SLA(s)** displays the SLAs associated with the case. You can view the SLA definitions defined for the cases associated with the case. You can also add an SLA using the **New** option.

Attached Knowledge

The **Attached knowledge** displays the attached knowledge articles with the case. You can add a knowledge article using the **New** option.

KB Articles Read by User

Displays the knowledge base articles read by the user associated with the case.

Related cases

The **Related cases** displays the cases that are related with the case. You can also create a case using the **New** option.

Workplace cases

The **Workplace cases** tab appears when you open a maintenance case. You can view the workplace cases associated with the maintenance case. You can create a case using the **New** option.

Requested Service Items

The **Requested Service Items** displays the workplace service items that are requested with the case.

(2) Action panel

The details page displays a side panel on the right side that enables you to perform various actions and also view important details to help you resolve the case. The side panel consists of the following options:

- **At a glance**: When you open the case, by default, the page displays the **Requested for** employee details if available in the **Employee details** panel. This panel appears when the At a Glance ( ) option is selected. The details include the name of the employee, the email address of the employee using which you can send an email directly to the employee and the contact details. If the employee details are unavailable, then the admin or the case manager details are displayed.
- **Knowledge Articles**: Select the Knowledge Article icon ( ) to view knowledge articles based on the case. You can **Flag** the article, view the article in a separate tab using the **Full view** option and mark the article as useful using the **Helpful** option.

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- **Attachment**: Select Attachment icon () to view the attachments in the case. You can also upload attachments if necessary.
- **Template**: Select the Template icon () to view the templates associated with the case. If you selected your own template, you can view them in the **My Template** tab. You can also create a template using the Create template option ().
- **Location**: Select the Location icon () to view the workplace location specified in the case. The **Workplace Location** panel displays the details of the location such as the **Floor**,**Building**, **Campus** and **Region**. The location is also displayed on a floor map. You can drag on the map and also zoom in/out for a better view.
  - For a move case, the **Location** panel displays the details of the **From location** and **To location** under the **Move from** and **Move to** tabs.
  - For a maintenance case, the **Workplace location** panel displays the location of the asset specified in the case. If an asset isn't specified, then the workplace location selected in the case is specified.
- **Fulfilment instructions**: Select the Fulfillment instructions icon () to view the fulfillment instructions related to the case.
- **Checklist**: Select the Checklist icon () to view the checklist of the case. You can mark the checklist if it's done and also add checklist items using the **Edit** option.

You can perform the following actions on a case at any time:

Cancel

Cancel a case at any time if it's no longer required. Cancelling the case will cancel all the child cases and tasks associated with it. The state of the cases and tasks is set as Cancelled.

Save

Save the changes that you made on the case using the **Save** option.

Delete

As an admin, delete a case record completely from the application.

> **Important:** Only an admin can delete a case. A case admin can delete only a workplace case, a move admin can delete only a move case and a maintenance admin can delete only a maintenance case.

Schedule Plan details form

The details form helps you select the project and schedule for your schedule plan.

Details form

Field	Description
Name	Name of the schedule plan.
Department Cost Center Workplace Entity	Department, Cost Center, or Workplace Entity that the schedule plan is created for.

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Details form (continued)

Field	Description
	This field name is based on the value of the *sn_wsd_core.ALLOCATION_TYPE* property.
Description	Description for the schedule plan.
Active	Option to activate the schedule plan record. This field can't be edited and is automatically updated based on the schedule plan state. This field is selected by default and is cleared if the schedule plan is cancelled or complete. This field appears only after the schedule plan record is created and is visible while editing the schedule plan.
Assigned to	User that the schedule plan is assigned to. This field is automatically set to the user who creates the schedule plan. This field appears only after the schedule plan record is created and is available while editing the schedule plan.
Domain	Domain that the schedule plan is created for. This field appears only after the schedule plan is created and is available while editing the schedule plan.

Selection template form

Field	Description
Schedule	Schedule that is followed to assign workspaces.
Start date	Start date of the workspace assignments. The start date must be in the future.
End date	End date of the workspace assignments.

Note: You can edit a schedule plan only if it is in the Draft state. If the schedule plan is not in the Draft state, you can only change the **Name**, **Assigned to**, and **Description** fields.

Scenario details form

Use the scenario details form to select the scenario owner, location, group by selection, and space selection criteria.

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Scenario details form

Field	Description
Scenario name	Name of the scenario
Scenario owner	Scenario owner's name or ID. This is a read-only field and auto-populated. After the scenario is created, the field name changes to **Owned by**. After the scenario is created, you can assign it to another user.
Locations	Locations that are added to the scenario. This field is displayed after a scenario is created. The locations are displayed based on the **Space Selection Criteria** of the scenario.
Group by	Option to select and group a scenario based on the allocation type. After the scenario is created, this field becomes read-only. Allocation types are defined in the *sn_wsd_core.ALLOCATION_TYPE* system property. • Department • Cost center • Neighborhood • Workplace Entity If you select Workplace Entity as the group by option, the bars of the stack plan are displayed based on the lowest node in the hierarchy. For example, if the hierarchy for spaces is `Corporate\Europe\Information Technology\IT Support`, the bars are displayed for `IT Support`.

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Scenario details form (continued)

Field	Description
	Note: • If **Neighborhood** is selected as the group by option, only assignments that have the **Neighborhood assignment** type are applicable. For any other group by option, assignments that have the **Location assignment** type are applicable. • Creating or viewing a scenario based on workplace entities is supported from Workplace Space Management version 1.15.0. Workplace Entity is not supported for scenarios created in earlier versions. For earlier versions, you can view spaces based on their workplace entities for a building. For more information, see Edit or view a building's spaces based on workplace entities.
Space Selection Criteria	Option to apply filter and select locations for a scenario. • Select field: Select campus, building, or floor as required. For example: Building is B1A2. You can select and add multiple buildings using the space selection criteria. • Select operator: Select **And Or** operators as required. • Enter value: Option to provide the value for the selected field. For example, if you select Building, then enter the value as the name of the building (Building A). Location names are displayed based on the filter conditions. Select the refresh icon ( ) to view results matching filter conditions.

Space Deployment Plan

A space deployment plan contains information about how the changes made in the scenario impact the building's spaces.

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Space Deployment Plan table

Column	Description
Space	Workplace location that is used for the scenario-related change.
Floor	Floor of the workplace location.
Building	Building of the workplace location.
Type of change	Type of change made to the space in the scenario plan. The value in this column can be `Allocation`, `Assignment type`, or `(empty)` based on the changes made to the workplace location. For example, if a space was allocated to IT Support, and the scenario allocates the space to HR and Finance, the Type of change is `Allocation`.
Current value	Current allocation or assignment type value of the workplace location. The value in this column depends on the type of change made to the workplace location. For example, if a space was allocated to IT Support, and the scenario allocates the space to HR and Finance, the current value is `IT Support`.
Scenario value	Allocation or assignment type value of the workplace location in the scenario. The value in this column depends on the type of change made to the workplace location. For example, if a space was allocated to the Workplace Entity IT Support, and the scenario allocates the space to HR and Finance, the scenario value is `Workplace Entities: HR, Finance`.
Updates	Number of updates that are made to the workplace location in the scenario.
Updated	Timestamp of the last change made to the workplace location.
Workplace case	Workplace case record that is created for allocation changes to the workplace location. Workplace cases are created after a scenario is deployed. The value in this column is empty for assignment type changes.

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User Deployment Plan

A user deployment plan contains information about how the changes made in the scenario impact the employees and their workplace locations.

User Deployment Plan table

Column	Description
User	User who is impacted by the scenario-related change.
Operation	Type of operation that is made in the scenario. • Insert: The user is assigned a new space in the scenario • Update: The user's assigned space is changed in the scenario • Delete: The user's assignment is removed in the scenario • Orphan: The user's neighborhood is resized to 0 in the scenario, so the user's assignment to the neighborhood on the corresponding floor has become orphaned.
From workplace location	Current workplace location that is assigned to the user.
Workplace location	Workplace location assigned to the user in the scenario plan.
Parent	Parent of the assigned workplace location. The system displays up to 2 parents based on the location hierarchy.
Workplace case	Workplace case record that is created for assignment changes of the user. Workplace cases are created after a scenario is deployed.

Excel column lengths for move projects

The Excel columns must be within the specified length to create a move project.

Excel column lengths for move projects

Excel Column	Column length
Employee name	151
Employee email	100
Urgency	40
From building	100
From floor	

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Excel column lengths for move projects (continued)

Excel Column	Column length
From space	
To building	
To floor	
To space	
Additional details	4000

Move conflicts for projects created via Excel upload

Review the conflicts and decide whether you want to resolve or ignore them.

If you create a move project from an excel file, the Move information table displays the business and data conflicts. You can review the conflicts to decide whether you want to resolve or ignore them. You can also remove the move record from the table.

Data issues

Conflict	Description
Missing required data	The record doesn't contain information for the specified mandatory columns. • Employee name • Employee email • From building • From floor • From space • To building • To floor • To space
Invalid/Non existent Employee	The user name isn't available in the system.
Invalid/Non existent email	The email address isn't available in the system.
Incorrect to building/floor/space	The building, floor, or space that the user is moving to is incorrect or invalid.
Incorrect from building/floor/space	The building, floor, or space that the user is moving from is incorrect or invalid.
Same source and destination	The From and To location of the record is the same.

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Business Conflicts

Conflict	Description
Inactive Destination	The location record of the selected destination is inactive.
Occupied Destination	The selected destination is already occupied by another user.
Allocation Mismatch	The user's allocation doesn't match the allocation of the selected destination. For more information about allocations, see Allocate a cost center, department, or workplace entity.
Flexible Destination	The selected destination is a flexible or shared location, not a fixed assignment. For more information about flexible and permanent spaces, see Configure a workspace or desk as flexible or permanent.
Capacity Exceeded	The selected destination exceeds its capacity when the move is completed. For more information about defining the capacity of a location, see Define the capacity of workplace areas.
Duplicate destination location	If the uploaded Excel sheet has the same location listed in two different rows, this conflict will occur.

Workplace Central troubleshooting

Troubleshoot issues that you face in the Workplace Central application.

Condition

After transferring Workplace Central data between ServiceNow ServiceNow instances, some data and links are lost.

Remedy

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. From the Fix Scripts list, select the **Load space details table- current state** script.
3. On the Fix Script details page, select **Run Fix Script**.

Workplace Task form - Space Assignment task

The Workplace Task form specifies details to assign a space to a neighborhood.

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Workplace Task form - Space Assignment task

Field	Description
Number	Task number for the workplace task. This field is auto-generated and can't be edited.
State	State of the workplace task. This field is automatically set to **Open** and can't be edited.
Workplace task type	Type of Workplace Task. This field is automatically set to **Assign spaces to neighborhood**.
Neighborhood	Neighborhood that the space must be assigned to.
Workplace task sub type	Sub-type of the space assignment task. You can select any of the following options based on your requirement. • None: No sub type. The default value is **Append**. • Append: Assign the space to the list of existing spaces. • Remove all and replace: Remove existing spaces from the neighborhood and assign the new spaces.
Short description	Description for the workplace task.
Table	Table that is used to select spaces for the assignments. You can select either of the following options based on your requirement. • Room [sn_wsd_core_room]: Assign meeting rooms to the neighborhood. • Space [sn_wsd_core_space]: Assign workspaces to the neighborhood.
Filter	Conditions used to filter spaces from the selected table. For more information about conditions, see Condition builder.

Neighborhood User Assignment Rule form

The Neighborhood User Assignment Rule form specifies conditions based on which users or their profiles must be assigned to the neighborhood.

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Neighborhood User Assignment Rule form

Field	Description
Name	Name of the assignment rule.
State	State of the assignment rule record. This field is automatically set to **None** and can't be edited.
Neighborhood	Neighborhood that the rule is being created for.
Active	Option to set the assignment rule to active. This check box is automatically selected.
Building	Building that the assignment rule must be applied to.
Last sync time	Last time the rule was run to sync the neighborhood and the user assignments.
Floor	Floor that the assignment rule must be applied to. You can select a floor only after selecting a building.
Table	Table that is used to select users for the assignments. You can select either of the following options based on your requirement. • User [sys_user]: Select the system user records for assignments. • User Workplace Profile [sn_wsd_core_workplace_profile]: Select Workplace Profiles for assignments.
Filter	Conditions used to filter users from the selected table. For more information about conditions, see Condition builder.

User Workplace Profile form

The User Workplace Profile form specifies details about an employee like their name, primary location, and allocation.

User Workplace Profile form

Field	Description
Employee	Employee who the workplace profile must be created for.
Active	Option to set the workplace profile to active.
Primary workplace location	Location assignment of the user that is set as primary. This field is automatically filled can't be edited.
Reason for anomaly	Anomaly type for the location assignment of the profile.

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User Workplace Profile form (continued)

Field	Description
	This field is automatically set to **no** and can't be edited.
Workplace entity	Workplace entity that the user must be allocated to. For more information about workplace entity, see Configure Workplace entity and entity types.
Enable employee location privacy	Location privacy setting for the workplace profile. This field is automatically set to **None** and can't be edited.

Workplace Connectors

Workplace Connectors is a generic framework using which data from the badging or occupancy sensors can be imported to Workplace Service Delivery applications using spokes.

Get started

Explore

Learn about Workplace Connectors concepts and features

Configure

Configure Workplace Connectors

Setup

Setup Workplace Connectors.

Reference

Get details about components like fields, tables, and properties

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

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Exploring Workplace Connectors

Workplace Connectors is a framework to integrate different types of badging, occupancy, air quality, and temperature sensor data. It provides a standardized way of fetching badging, occupancy, air quality and temperature data from workplace hardware or sensors in Workplace Service Delivery.

Key features

- Configure multiple hardware or sensor data providers (for example multiple badging vendors, occupancy sensors, air quality and temperature sensors).
- Create extension points to transform data from workplace hardware or sensor to a vendor agnostic format. For more information, see Creating and adding a scripted extension point.
- Provide employee badging data analytics and metrics to optimize workplace space occupancy.
- Space Occupancy metrics dashboard to view analytics based on employee headcount and office space usage.
- Configure reservation automatic check-in based on the Space Occupancy data insights.
- Provide Occupancy sensor data for workplace locations. View and manage your reservations on the location directory based on occupancy and reservation statuses.
- Monitor indoor pollutants including Particulate Matter (PM1 & PM2.5) and air borne chemicals (Volatile Organic Compounds or VOCs), relative humidity levels, temperature, and Carbon dioxide (CO2) levels in a building or workplace.
- Reduced operating costs of workplaces or building maintenance with better air quality and optimum levels of humidity. Reduced particulate matter in the air reduces energy consumption of a building.

Configure Workplace Connectors

Configure Workplace Connectors to complete the installation and setup tasks.

Install Workplace Connectors

Install the Workplace Connectors application from the ServiceNow Store.

Before you begin

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Ensure you have the following plugins:

- Workplace Connectors
- Workplace Central
- Workplace Core

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.

Use the following details when required:

- Name of the application: Workplace Connectors
- Application ID: sn_wsd_wc

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Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Connectors or ID (sn_wsd_wc). If you can't find the application, you may have to request it from the ServiceNow Store.
3. Select **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed. If there are any plugins or applications that must be installed, you must install them before you can install Workplace Space Management.
5. **Optional:** If demo data is available and you want to install it, select **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Configure sensor data providers

Configure sensor data providers in Workplace Connectors for retrieving the workplace sensor data from third-party data providers.

Before you begin

Note: If you're using demo data or product data (seed data), the provider name field is pre-filled. In case, if you aren't using the base system product data, you can create a provider data record. The seed data is available as part of the Metrikus Spoke integration.

Role required: admin (sn_wsd_wc.admin)

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Administration** > **Providers**.
2. Select **New**.

   Enter a provider name. For example: Metrikus.

3. Select **Submit**.

Setup Workplace Connectors for badging data

As a Workplace Connectors administrator, configure Workplace Connectors to import data from workplace badging data records. For example, employee attendance data from badging spokes.

The badging vendor Spoke is designed to handle badging data from a specific vendor. It utilizes a badging data table as the source for retrieving the data. It also allows for importing CSV data files through the SFTP method. A scheduled import set is used to transform the file and populate the Badging Data table.

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Workplace Connector provides analytics capabilities to analyze employee attendance data. The scheduled job *Process Provider Data Record* runs every 5 minutes to fetch data and populate the Employee Attendance table.

Badging data analytics requirement

- Ensure that employees have an employee workplace profile.
- Workplace locations are assigned to employee workplace profile.

Note: For more information about how to implement the Workplace Connectors framework and badging sensor data, see Workplace Connectors Implementation Guide V1.0 Aug 2023 on the ServiceNow Community.

Configure data Sources and schedule imports

Set up the data source for the integration framework (for example, badging spoke data) and schedule the import job to retrieve data from the data source periodically.

Before you begin

Role required: sn_wsd_wc.admin

Procedure

1. Navigate to **All** > **System Import Sets** > **Data Sources**.
2. Open the data source form by selecting **Create New**.
3. Import the badging data record of employees to Workplace Connectors by selecting the imported file (for example, the CSV badging file).
4. On the form, fill in the fields.

Data Source form

Field	Description
Name	Name for the data source.
Import set table label	Label for the import set table. For example, Badging Data.
Import set table name	Name of the import set table. For example, badging_data.
Type	Option to select the connection type from the source to the Badging Data table. For example, select File.
File retrieval method	Option to select the appropriate method from the drop-down list to import the file. For example, SFTP, FTP, and so on.
Format	Option to indicate the data format type. For example, CSV.

5. Select **Save**.
6. Navigate to **All** > **Scheduled Import Sets** > **Scheduled Imports**.
7. Select **Create New**.

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8. Configure the scheduled job according to your requirements, including the frequency of execution, and mapping to the data source.
9. On the form, fill in the fields.

Scheduled Data Import form

Field	Description
Name	Name of the installed workplace hardware,sensor data provider, or spoke. For example, occupancy sensor, badging spoke data, and so on.
Data Source	The source data table (Badging Data table) and the target table (Employee Attendance Data table).
Run as	User that executes the scheduled job. For example: **System Administrator**.
Run	Desired import frequency for the scheduled job. For example, **Daily**.
Daily	The time at which the scheduled job should be imported. For example: 10:30:00

10. Select **Execute Now**.

Create a badging data provider

Configure and add a new provider to fetch the badging data.

Before you begin

Role required: sn_wsd_wc.admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Administration** > **Providers**.
2. Select **New** and add a new provider to get the badging data from the spoke vendor.

Configure connectors for badging data

Configure the connector configuration table [sn_wsd_wc_connector_config] to fetch the badging spoke data records.

Before you begin

As a Workplace Connectors administrator, add the new connector configuration table to connect with the badging integration framework. This configuration fetches the badging data from the integration framework.

Role required: sn_wsd_wc.admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Connector Configuration**.
2. On the pane, select the Application scope as **Workplace Connectors**.

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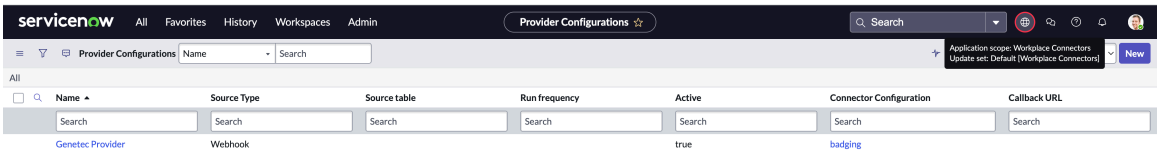

3. Select **New**.
4. In the **Target table** field, select the target table for the badging spoke data.
   In this case, it's the Employee Attendance Data table. For more information, see Employee attendance data.
5. In the **Type** field, select the type of data the connector processes from the drop-down list.

   For example, badging data or occupancy data.
6. In the **Extension Point Definition** field, select the lookup list icon ( ) and select the **BadgingDataHandler** as the extension point for integration.

   Note: The extension point is used to process badging data from the provider and convert it to the standard format to be implemented by each provider. It's just an interface. Each provider must have a separate implementation.

   For more information, see Creating and adding a scripted extension point .
7. Select **Submit** to save the connector configuration.

Provider connector configuration

To register details for a new provider, configure a provider to import data from a badging table or use the web hook APIs. The badging data is shared with Workplace Connectors by badging vendors. The badging data is processed and transformed to derive space occupancy metrics in your organization.

Configure badging table data

Register details for a new provider, configure a badging table and import data from the source table to the target table to integrate with the badging system.

Before you begin

The Badging data table is the source table and the Employee Attendance Data table is the target table. The badging data from the source table is imported from a badging provider (for example, the attendance data from badge readers).

Role required: sn_wsd_wc.admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Provider Connector Configurations**.
2. From the menu, select the application scope icon ( ).
3. Select **Create New**.

   On the form, fill in the fields.

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Provider Connector Configuration form

Field	Description
Provider	Name of badging data provider.
Source Type	Source from where the badging data is collected and loaded into the target Employee attendance table. From the drop-down list, select **Table**. **Note:** If you're an existing user and have selected the **Import from table** option in an earlier release to retrieve badging data in your Workplace Connectors instance, the **Source Type** field is defaulted to **Table**. If the **Import from table** option wasn't selected in your Workplace Connectors instance, then the **Source Type** field is defaulted to **External**. The **Import from table** option isn't supported in the November ServiceNow Store release.
Run frequency	Day and time frequency to import data from the workplace system. For example: 5 minutes. The process provider data record picks the records from the badging data table and populates the Employee Attendance table based on the run frequency.
Active	Option to indicate that the provider configuration is active.
Connector Configuration	Select the lookup list icon ( ) and select **Badging**. For more information, see Configure connectors for badging data.

4. Select **Submit**.
5. In the Provider Executions table section, filter by **Last query time**.

   The Provider Execution table [sn_wsd_wc_provider_execution] stores all the scheduled job execution timestamps. Every time that the scheduled job **Process Provider data** record runs, this table shows an entry in the Last query time column. The time to import data from the source table (Badging data) to the target table (Employee attendance data) table is updated in the Last query time column.
6. Select **Save**.
7. Navigate to **All** > **System Definition** > **Scheduled jobs**.
8. In the **Scheduled Jobs Name** field, filter data by **Process provider data records** and select it.

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Process provider data records read data from vendor badging data (source table). After processing the badging data, it loads it into the Employee Attendance Data table (target table).

9. Select and open the Schedule Script Execution for Provider process data records in the edit mode.
10. Review the Process provider data records form.
    If necessary, change or update the **Repeat interval** timings for the scheduled job.
11. Select **Execute Now**.
    The scheduled job takes the source data from the Badging data table to transform the data in the required format, and place it in the target Employee Attendance Data table.

Configure a webhook event

Configure a webhook API event in the Provider configuration table to enable badging vendors to share the badging data collected from badging tables using the webhook event.

Before you begin

Role required: sn_wsd_wc.admin

About this task

The badging data (JSON) is processed using the ServiceNow Rest API explorer. Single or multiple raw badging data records (payload) can be shared and processed using the REST API explorer. The webhook event for badging data is loaded to the Connector Events table in single or multiple JSON records. Multiple records are sent as an array. For more information, see Attendance Analytics.

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Provider Connector Configurations**.
2. Select **Create New**.

   On the form, fill in the fields.

Provider Connector Configuration form

Field	Description
Name	Name for the provider configuration.
Source Type	Source from where the badging data is collected and loaded into the target Employee attendance table. Select **Webhook** to configure the webhook event.
Token Param Name	The **Token Param Name** and **Token value** is a secret key-value pair, which is used to authenticate the API call from the vendor badging system to the Workplace Connectors application. Both systems have the token name value. Using the token name, the application authenticates the API request.
Token value	The token value is the secret key used by the badging vendor while calling the API event to let the server authenticate the API request.

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Field	Description
Active	Option to indicate that the provider configuration is Active.
Connector Configuration	Option to search for and select the lookup list icon ( ) to select **Badging**. For more information, see Configure connectors for badging data.
Callback URL	Option to select the callback URL icon ( ) to lock or edit the callback URL.

3. Select **Update**.
4. Select the newly created webhook event.

   The Generate Callback URL button is available to generate a callback URL for the REST API request.

5. As a badging vendor, share the badging data in JSON format by navigating to **All** > **System Web Services** > **REST** > **Rest API Explorer**.
6. In the Rest API Explorer page, select the following:
   - Namespace: From the drop-down list, select **sn_wsd_wc**
   - API Name: Workplace Connector Webhook
   - API Version: v1
7. On the Workplace Connector Webhook event page, provide the following values:
   - token_name: Token param name used in step 2. The token name value is used by badging vendors to share the badging data (JSON) with Workplace Connectors. The raw data (payload or badging data) is processed and loaded into the Connector Events table.
   - ni.nolog.id: Copy the System ID of the webhook created in step 2 and paste it. Select the additional actions menu icon ( ) from the pane.
   - token_value: Token value provided in step 2. The token value is the secret key used by the badging vendor while calling the API event to let the server authenticate the API request.

   a. In the API Request body, select **Raw** and copy the badging data (payload) in JSON format. This badging data is collected from badging sensors.

   b. Select **Send**.
   If the Response code is **200 OK** and the response result is **Success**, the badging data is loaded into the Connector Events table.

   - The Connector Events table (sn_wsd_wc_connector_events) loads the badging data shared by badging vendors. The State of the badging data is **New** when it's loaded by the REST API Explorer.
   - The scheduled Job **Process webhook provider data records** runs every minute to load the badging data from the Connector Events table (data with the State **New**) to the Employee Attendance Data table.

   The scheduled job takes the source data from the **Webhook** event to transform the data in the required format and then place it in the target Employee Attendance Data table.

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Note: To access the Workplace Connectors scheduled jobs, navigate to **All** > **System Definition** > **Scheduled jobs**. Search for **Workplace connectors** in the Application column. Two scheduled jobs are available for Workplace Connectors.

- **Process provider data records**: Reads data from vendor badging data (source table). After processing the badging data, the record loads it into the Employee Attendance Data table (target table). For more information, see Configure badging table data.
- **Process webhook provider data records**: Reads data from the Connector Events table. Processes the webhook event data and loads it into the Employee Attendance Data table (target table).
- Data is loaded to the Employee Attendance Data table. The state of the badging data in the Connector Events table changes to **Processed**.
- From the Employee Attendance Data table, the data is loaded into the Attendance Analytics table.

Note: Badging data records in the Connector Events table with the state of Processed are purged after two days from the date of creation or the current date by the Connector Events table [sn_wsd_wc_connector_events]. Data in the Error state is purged after seven days from the date of creation. Data in the New state isn't purged.

Employee attendance data

The Employee Attendance data [sn_wsd_wc_employee_attendance_data] is the target table that contains the employee badging data and employee access records.

Before you begin

The *Process Provider Data Record* scheduled job runs periodically (every five minutes) and loads the badging data into the Employee Attendance table. It collects the data from the source table (badging data) and transforms it in the required format before loading it in the target (Employee Attendance Data) table.

Role required: sn_wsd_wc.admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Badging Readers** > **Employee Attendance Data**.
2. Select **New**.
3. Fill in the form fields.

Employee Attendance Data

Field	Description
User	Option to select the user from the workplace profile.
Location	Option to select workplace locations. Ihe user workplace profile, the **Location** field must be updated with the correct location and the **Workplace entity** column is mapped to the user workplace profile.
Event type	Option to select the event types:

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Field	Description
	○ Swipe-in ○ Swipe-out Select **Swipe-in**.
State	Option to select the badging data state: ○ Access Granted ○ Access Denied ○ Blocked Select **Access Granted**.

The Employee Attendance table data is loaded to the Attendance Analytics table to generate space occupancy metrics in Workplace Central. For more information, see Attendance Analytics.

Attendance Analytics

The Attendance analytics table computes badging data based on the employee head count at the region, site, campus, and building level. It derives occupancy data from the Employee Attendance Data table.

Before you begin

Role required: sn_wsd_wc.admin

Procedure

1. **Optional:** Navigate to **All** > **Employee Attendance Data**.

   (Optional) Verify that the Event Type column is set to **Swipe-in** and the State column is set to **Access Granted**.

2. **Optional:** Navigate to **All** > **Workplace Core** > **Administration** > **Workplace profiles**.

   - Verify that the **Location** field is updated with the correct location. For more information, see Set the primary location of a workplace profile.
   - Verify that the **Workplace entity** column is mapped to the user workplace profile. For more information, see Map designated workspaces to user profiles and Configure Workplace entity and entity types.

3. Navigate to **All** and in the application context menu search for **sn_wsd_central_attendance_analytics.list**.

   The Attendance Analytics page is displayed.

   Note: Attendance data records with N-2 timestamp are processed by the scheduled job. Here, N is the current date or day before yesterday.

   The Occupancy dashboard metrics can be viewed in Workplace Central. The following roles can access the reports:

   - sn_wsd_central.workplace_analytics_user
   - sn_wsd_wc.manager
   - sn_wsd_wc.user

4. **Optional:** Navigate to **All** > **Workplace Central** > **Occupancy Dashboard**.

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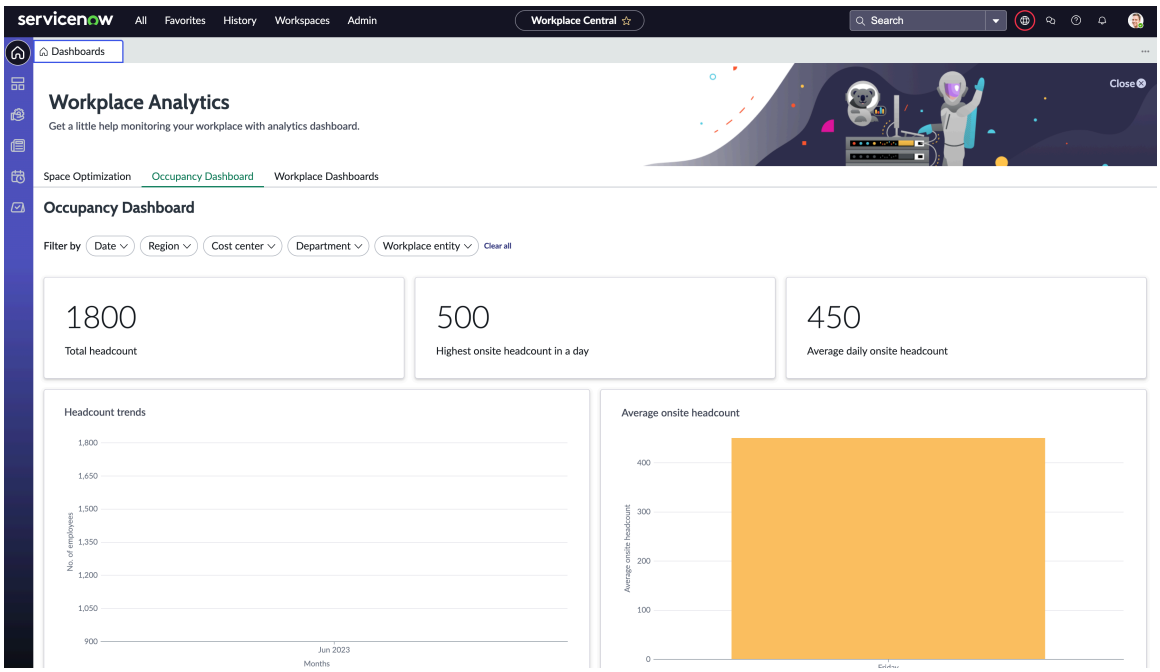
(Optional) In Workplace Central, filter data by **Workplace entity** on the Occupancy dashboard data.

- The scheduled job **WSDHeadCount Daily Job** in Workplace Central runs daily, and retrieves data from the Employee Attendance table and loads it into the Attendance Analytics table.
- (Optional) The WSDHeadCount Daily Job scheduled job checks for Workplace entity mapped values. It populates the employee space occupancy data based on the head count at the Region, Site, Campus, and Building level for a workplace entity.



For more information, see View Occupancy Dashboard.

Setup Workplace Connectors for occupancy data

Configure workplace connectors to provide workplace occupancy data.

Workplace Occupancy data provides real-time insights on workplace space and resource optimization. It uses the occupancy data from the occupancy connectors or sensors installed at a workplace location. The occupancy data is provided by third-party occupancy sensor data providers. For example, Metrikus Spoke is integrated with Flow Designer Integration Hub. The external Ids from Metrikus Spoke are mapped with Workplace Connectors locations to fetch the occupancy data.

Note: Customers who aren't using the Metrikus Spoke must build their own integration to get Occupancy data insights for locations provided in Workplace Connectors locations.

Workplace occupancy connector data provides the following benefits;

- Automatically checks in a reservation based on the space occupancy data and reservation status. For example, Occupied, unoccupied, reservation is in progress, reservation is canceled, and so on. For more information, see Configure automatic check-in for reserved spaces.
- Provides near-real time occupancy data on floor maps, Employees can reserve spaces based on Occupancy data and reservation data.

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Activate Metrikus Spoke

Activate the Metrikus Spoke plugin from the ServiceNow Store.

Before you begin
Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.
   You can search for the application by its name Metrikus Spoke or ID [sn.wsd.metrikus.spoke]. If you can't find an application, request it from the ServiceNow store.

   Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. Select **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed. If there are any plugins or applications that must be installed, confirm to activate them before you activate the Metrikus Spoke plugin.
5. **Optional:** If demo data is available and you want to activate it, select **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first activate the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.
6. Select **Install**.

Integrate Metrikus spoke

Integrate Metrikus Spoke with Flow Designer Integration Hub to retrieve occupancy data for workplace locations.

Metrikus Spoke provides the occupancy sensor data by mapping the workplace locations or spaces provided in Workplace Connectors.

- Activate Metrikus Spoke.
- Integrate Metrikus spoke in Flow Designer Integration Hub.
- Configure sensor data providers in Workplace Connectors

Connector Configurations

Configure the Connector Configurations table for loading the occupancy data in the target Space Occupancy Data table (sn-wsd_wc_space_occupancy). Connector configuration table retrieves the sensor data from different occupancy data providers.

Before you begin
Ensure that you have the sensor data providers to retrieve and fetch data from an occupancy data provider vendor. For more information, see Configure sensor data providers

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Note: If you're using demo data or product data (seed data), some fields are pre-filled. In case, if you aren't using the base system product data, you can configure the connector data. The seed data is available as part of the Metrikus Spoke integration.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Connector Configuration**.
2. Select **New**.
3. Fill in the form fields:

Connector Configuration

Field	Description
Target Table	Option to indicate the target or destination table to store the occupancy data. Select Space Occupancy Data (sn_wsd_wc_space_occupancy) table. For more information, see Retrieving Space Occupancy Data.
Type	Option to select the type of sensor data. Select **Occupancy**.
Extension Point Definition	Option to search for extension point definition for the Occupancy data. Select the lookup list icon ( ) to search for an extension point definition, select the **OccupancyDataHandler** as the extension point for integration. **Note:** Extension point definition defines how the data is transformed from third-party occupancy sensor data providers. The occupancy data is loaded into the target or final table (Space Occupancy Data table). The external IDs provided by Metrikus or other occupancy data providers are processed and transformed. Each occupancy data provider must have a separate implementation or integration spoke framework.
Stale time (in minutes)	Option to indicate the time (in minutes) beyond which occupancy data is considered stale. Beyond this time, fresh data is fetched from the Occupancy data provider table. When you select a floor on the map and if that space has occupancy data sensor, then, fresh occupancy data is fetched for only

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Field	Description
	those spaces that have stale occupancy data.

4. Select **Submit** to save the connector configuration.

Provider Connector Configuration

Register details for the occupancy data provider, the data source type, and connector configuration (sensor) details. Filter spaces using a condition builder, and retrieve occupancy data for a workplace location.

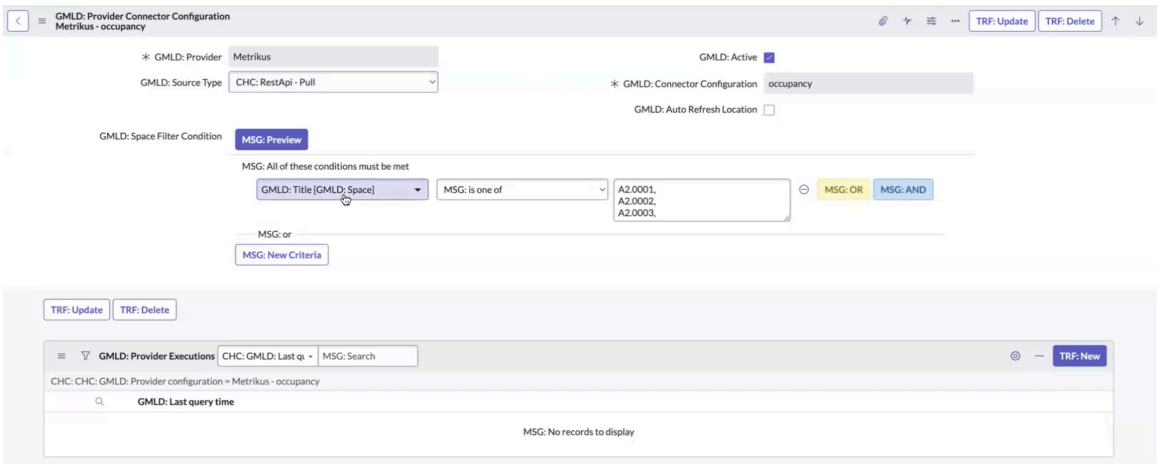
Before you begin

Note: If you're using demo data or product data (seed data), some fields are pre-filled. In case, if you aren't using the base system product data, you can configure the provider connector data table. The seed data is available as part of the Metrikus Spoke integration.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Administration** > **Provider Connector Configuration**.



2. Select **New**.
   On the form, fill in the fields:

Provider Connector Configurations

Field	Description
Provider	Name of the occupancy data provider. This field is auto-filled when the Metrikus Spoke is installed and configured with the Flow Designer Integration Hub.
Source Type	Option to specify the endpoint using which Workplace Connectors retrieves data from Metrikus or other occupancy data spoke providers. Select **RestApi-pull**

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Field	Description
Active	Option to select active provider connector configuration data. Only active records from the Provider Connector Configuration table are added or updated in the Provider Space Mapping table. By default, this option is set to **false**. Select the check box to set to **true**.
Connector Configuration	Option to select required sensor items from the Connector Configuration table. For example, badging or Occupancy.
Auto-refresh locations	Option to auto-refresh locations when spaces are added or when some spaces are removed from a selected location. The scheduled Job **Refresh Provider Space Mapping records** runs daily and reads the **Auto Refresh Location** field in the Provider Connector Configuration table. It reads all records in the Provider Connector Configuration records and updates the Provider Space Mapping table with the latest data. If this option is selected, then spaces that are added to a location are synchronized with the Provider Space Mapping table. If spaces are removed, the occupancy sensor data record is removed from the connector list of the Provider Space Mapping table. For example, if a floor or a space is added to a location, then they're automatically added to a selected location.

3. Filter spaces using the **Space Filter Condition**.
   Select **Preview** to see the results that your filter condition query returns. Select the link to view the matched space records in Workplace Connectors.

   For example, select **[Space]** from the list. Select the filter condition as **[is]** and manually enter the spaces **[A1.001, A1.002, A1.003]**.

   When a row is created or updated in the space filter conditions, the space records that meet the condition are loaded in the Provider Space Mapping table. A business rule runs in the background to fill the selected space records in the Provider Space Mappings table. For more information, see Configure Provider Space Mapping for occupancy data.

4. Select **Submit**.
   When a records are updated in the Provider Connector Configuration table, the selected spaces or location records are updated in the Provider Space Mapping table. The location records are updated with the location hierarchy (Region, Campus, Building, floor, and space records).

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Provider Space Type Mappings

This table maps workplace space types or locations with external ids provided by the space occupancy data providers.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Administration** > **Provider Space Type Mappings**.
2. On the form, fill in the fields.

Provider Space Type Mapping

Field	Description
Space Type	Workplace Service Delivery space type. For example, Rooms, Desks, meeting rooms, and so on
Provider Space Type	Space type of the Provider. For example, Desks, Rooms, and so on.
Provider	Provider name. For example: Metrikus.

3. Select **Submit**.

Configure Provider Space Mapping for occupancy data

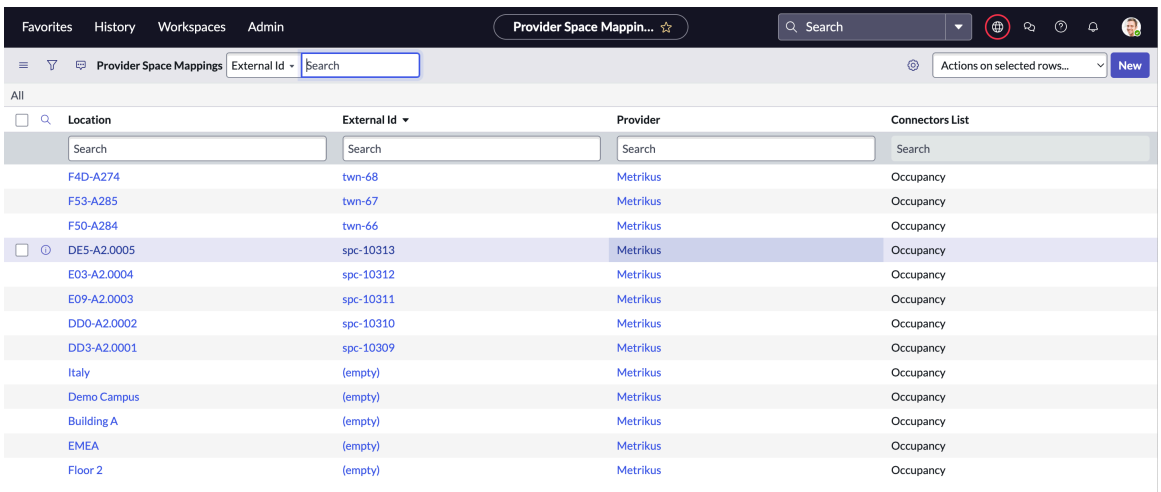
The Provider Space Mapping data table stores the workplace locations and external Ids provided by the occupancy data provider.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Administration** > **Provider Space Mapping**.
   The location data is mapped with the external Ids of the provider. For example, Metrikus occupancy data using the External Ids. The location hierarchy is shown for the spaces or locations that you selected in the Provider Connector Configuration table.



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2. To create a provider space mapping records, select **New**.
   Fill in the form fields:

Provider Space Mapping

Field	Description
Location	Workplace locations mapped with Occupancy data provider. The location data shows the complete location hierarchy (Region, site, campus, buildings, floors, and spaces)
External id	Option to enter manually the external id provided by the Metrikus spoke or any other occupancy spoke data provider. Select and select a row in the External id column, enter the Metrikus Id or spoke provider Id and select the tick mark icon ( ) to save it. External Ids are corresponding space Ids or location ids on the provider side. External ids from the Provider (for example, Metrikus) are mapped with the space records in Workplace Connectors . The external Id data is transformed to a corresponding Workplace Connectors space Id in the Metrikus Spoke data converter extension point. The data is then mapped to a space id in Workplace Connectors.
Provider	Name of the Provider providing the occupancy data in Workplace Connectors. For example, Metrikus. For more information, see Configure sensor data providers.
Connectors list	Option to show the list of all connectors or sensor data that the provider supports. Select the unlock connector list icon ( ) and select **Occupancy**.

3. Select **Submit**.

Retrieving Action Configurations data

Retrieve Actions from occupancy data provider using Flow Designer Integration Hub. Specify the transform definitions and invoke the Sub flow to retrieve Occupancy data. For example, Metrikus Spoke integration. The occupancy sensor data from the Occupancy data provider is transformed to derive space occupancy data in Workplace Connectors.

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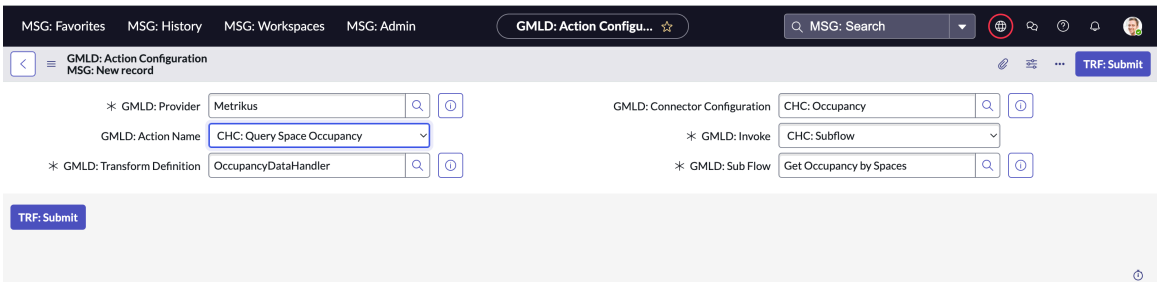
Before you begin

Note: If you're using demo data or product data (seed data), some fields are pre-filled. In case, if you aren't using the base system product data, you can configure the Actions configuration data table. The seed data is available as part of the Metrikus Spoke integration.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Administration** > **Action Configurations**.



2. Select **New**.

   Fill in the form fields:

Action Configurations

Field	Description
Provider	Name of the provider. Select **Metrikus**. For more information, see Configure sensor data providers.
Action Name	Actions are reusable operations to automate processes. Actions are defined in the Flow designer Metrikus spoke integration. For more information, seeMetrikus spoke Select **Query Space Occupancy**: The script for action configurations checks the workplace space for occupancy status. For example, **Occupied**, **Unoccupied**, **Invalid**, and so on.
Transform Definition	Transforms the occupancy data output from the providers (For example, Metrikus) in Workplace Connectors Select **Occupancy DataHandler**.
Connector Configuration	Option to select a sensor data from the connector configuration table. For example, Occupancy or Badging. Select **Occupancy**.

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Field	Description
	For more information, see Connector Configurations.
Invoke	Invokes sub flows from the Flow designer for Metrikus spoke integration. For more information, see Metrikus spoke Select **Subflow**.
Sub flow	Sub flows consist of properties, inputs or outputs, sequence of actions, and data collected or created. Sub flows are repeatable actions. Select **Get All occupancy by Ids**.

3. Select **Submit**.

   The occupancy data from the Actions Configurations table is loaded into the final or target table Retrieving Space Occupancy Data table.

Retrieving Space Occupancy Data

Retrieve the Space Occupancy Data table for loading workplace occupancy data and space occupancy data insights for a selected workplace location.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Occupancy Sensors** > **Space Occupancy Data**.

   Fill in the form fields.

Space Occupancy Data

Field	Descriptions
Provider Connector Configuration	Option to select the occupancy data provider and occupancy sensor. For example, **Metrikus - Occupancy**.
Count	Option to specify the count of users in a workplace location or space. Takes integer value. For example, 0, 1, and so on.
Event timestamp	Option to check for the stale time of the data. Stale time sn_wsd_wc_stale_time checks if the **Event Timestamp** field in the Space Occupancy data table has the latest timestamp. This property checks for the time beyond which the occupancy data is considered stale. Beyond the stale time, the fresh data is fetched from the Occupancy

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Field	Descriptions
	data provider (for example, Metrikus Spoke). If the **sn_wsd_wc_stale_time** property value is set to 30 minutes, application queries the Space Occupancy table and fetches the fresh data for a location or space from Metrikus every 30 minutes.
Location	Option to select a location for which you want the occupancy data.
State	Option to select the space or location Occupancy status (occupied, unoccupied, currently unoccupied, invalid, and so on.) for a selected location.
Query Status	Indicates the **Requested** or **Received** status for Occupancy sensor data. ○ **Requested**: Indicates a null or no response from Metrikus when there's an error or when the workplace spaces aren't mapped with Metrikus external Ids. ○ **Received**: Indicates a successful response from Metrikus for occupied or unoccupied workplace locations. To check for occupancy status of a space in the location directory (Card view and Map view), confirm that your Query status is in the **Received** status. If a workplace location or space is mapped with occupancy sensor data, the location directory space records also get updated (Occupied, unoccupied, not currently occupied, and so on).

2. Select **Submit** after making edits or any updates.

   The retrieved space occupancy data can be used to verify the following use cases:

   - Showing the occupancy data in the Location Directory. For more information, see Manage workplace activities and services with Location directory.
   - Automatic reservation check-in. For more information, see Configure automatic check-in for reserved spaces.

Archive and Purge space occupancy data

Archive and purge the Space Occupancy data (sn_wsd_wc_space_occupancy) table after every five days.

Before you begin

The Archive rule **Archive Space Occupancy table at the end of everyday** runs every day to archive data from the Space Occupancy data (sn_wsd_wc_space_occupancy) table and archives it in the **Archived Space Occupancy** Table (ar_sn_wsd_wc_space_occupancy). The Archive Destroy Rule **Destroy Space Occupancy archived table after every 5 days** purges data from Archived Space Occupancy Table (ar_sn_wsd_wc_space_occupancy) after every five days.

Role required: admin

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Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. Select and open the **Archive Space Occupancy table at the end of everyday** rule.
3. Select the **Active** check box.
4. In the **Conditions** field, change the archive filter conditions as required.
5. From the **Related Links** section, select **Run Archive Now**.

   The archived data is stored in the Archived Space Occupancy (ar_sn_wsd_wc_space_occupancy) table.
6. Navigate to **All** > **System Definition** > **Tables**.
7. Select **Archive space occupancy record**.

   All the deleted space occupancy data are stored in **Show List** under the Related Links section.
8. Navigate to **All** > **System Archiving** > **Archive Destroy Rules**.
9. Select **Destroy Space Occupancy archived table after every 5 days**.
10. In the **Conditions** field, set the archive duration condition as required.
11. From the Related Links section, select **Run Archive Destroy Now** to run the job.

    The Space occupancy data table records are deleted permanently.

Setup Workplace Connectors for environmental data

Configure the workplace environment data sensors to retrieve and fetch air quality and temperature data for a workplace. Define the units to measure air quality and temperature in the Unit of Measure table [sn_wsd_wc_unit_of_measure]. The units are added in the Environmental data table.

Workplace Connectors Environmental data table (sn_wsd_wc_space_environment) checks for workplace air quality and temperature. It checks for Carbon dioxide and Ozone levels along with temperature, and relative Humidity value at a workplace location.

Note: Workplace Connectors customers are expected to build their own environmental data framework for using Environmental sensor data records. For more information about how to implement the Workplace Connectors framework and environmental sensor data, see Workplace Connectors Implementation Guide V1.0 Aug 2024 on the ServiceNow Community.

Set up Connector Configuration for Environmental sensor data

Configure the Connector Configurations table for loading the Environmental data. Connector configuration table retrieves the sensor data from different environmental sensor data providers.

Before you begin

Make sure that vendor or provider is selected for fetching environmental sensor data. For more information, see Configure sensor data providers.

Note: Seed data or out-of-the box table record is provided with the application and provides pre-filled values. If you want to create a new table record follow these steps.

Role required: admin

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Procedure

1. Navigate to **All** > **Workplace Connectors** > **Connector Configuration**.
2. Select **New**.
3. Fill in the form fields:

Connector Configuration

Field	Description
Target Table	Target or destination table to store the environmental sensor data. Select Environmental data (sn_wsd_wc_space_environment) table. For more information, see Configure environmental sensor data for a workplace location.
Type	Type of sensor data. Select **Environment** from the list.
Extension Point Definition	Search for extension point definition for the environmental data. Search using the lookup list icon ( ) to locate the extension point definition **EnvironmentDataHandler**.

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Field	Description
	Note: Extension point definition defines how the data is transformed from third-party environmental sensor data providers. The data is loaded after transformation into the target environmental data table . The external IDs provided by Metrikus or other data providers are processed and transformed. Environmental data providers or vendors should have a separate implementation framework for these extension points. For example, if you have two different vendors providing environmental data records, you are expected to create two different implementations for the extension point (EnvironmentDataHandler, provided out-of-the-box). Make sure that you are storing the environmental data in the units as per the units configured in the Units of measure table. The units should match. For example, If the environmental data provider or vendor is sharing Temperature sensor data records in Fahrenheit and the temperature unit in the Units of measure table is in Celsius, the Fahrenheit units should be converted to Celsius. The conversion can be done using the Extension point definition. For more information, see Set up the Units of measure data table for environmental sensors.
Stale time (in minutes)	Time (in minutes) beyond which data is considered stale. Beyond this time, fresh data is fetched from the data provider table. For example, 5 minutes. The application will fetch data every 5 minutes.

4. Select **Submit** to save the connector configuration.

Provider Connector Configuration for Environmental sensors

Configure the provider connector configuration for setting up environmental sensors in workplace locations.

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Before you begin

Make sure that you have configured the sensor data providers for fetching environmental data from enviromental sensor providers or vendors. For more information, see Configure sensor data providers.

Note: Seed data or out-of-the box table record is provided with the application and provides pre-filled values. If you want to create a new table record follow these steps.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Provider Connector Configuration**.
2. Select **New**.
   On the form, fill in the fields:

Provider Connector Configurations

Field	Description
Provider	Name of the environmental sensor data provider. This field is auto-filled when the provider (for example, Metrikus Spoke).
Source Type	Option to specify the endpoint using which Workplace Connectors retrieves data from Metrikus or other environmental sensor data providers. Following options are available: ○ Table ○ Webhook ○ External ○ RestAPI-Pull For example, select **RestApi-pull**
Active	Option to select active provider connector configuration data. Only active records from the Provider Connector Configuration table are added or updated in the Provider Space Mapping table. By default, this option is set to **false**. Set this value to **true**.
Connector Configuration	Option to select required sensor items from the Connector Configuration table. For example, environmental.
Auto-refresh locations	Option to auto-refresh locations when spaces are added or when some spaces are removed from a selected location. The scheduled Job **Refresh Provider Space Mapping records** runs daily and reads the **Auto Refresh Location** field in the Provider Connector Configuration table. It

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Field	Description
	reads all records in the Provider Connector Configuration records and updates the Provider Space Mapping table with the latest data. For example, if a new floor or a space is added to a location, then they're automatically added to a selected location.

3. Filter spaces using the **Space Filter Condition**.
   Select **Preview** to see the results that your filter condition query returns. Select the link to view the matched space records in Workplace Connectors.

   For example, select **[Space]** from the list. Select the filter condition as **[is]** and manually enter the spaces **[A1.001, A1.002, A1.003]**.

   When a row is created or updated in the space filter conditions, the space records that meet the condition are loaded in the Provider Space Mapping table. A business rule runs in the background to fill the selected space records in the Provider Space Mappings table. For more information, see Configure Provider Space Mapping for occupancy data.

4. Select **Submit**.
   When a records are updated in the Provider Connector Configuration table, the selected spaces or location records are updated in the Provider Space Mapping table. The location records are updated with the location hierarchy (Region, Campus, Building, floor, and space records).

Set up the Units of measure data table for environmental sensors

Configure the unit of measure for air quality (Carbon dioxide and Ozone metric) and temperature units (degree celsius and micrograms per cubic meter) for a workplace location. The Workplace Connectors environmental sensors checks for the air and temperature quality metrics in a workplace location.

Before you begin

Note: The units selected in the Units of measure data table should match with the actual data that is shared by your provider or vendor using the Extension Point definition or EnvironmentDataHandler. If the data units don't match, it must be converted and then, stored in the environmental data. For more information, see Provider Connector Configuration for Environmental sensors

Seed data or out-of-the box table record is provided with the application and provides pre-filled values. If you want to create a new table record follow these steps.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Units of Measure**.
2. Select **New**.
3. Fill in the form fields.

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Units of Measure

Field	Description
Table name	The Environmental sensor data table (sn_wsd_wc_space_environment) name.
Value field	Parameters for which you want to have the unit of measure. For example, Carbon dioxide units, Event timestamp, Location, Ozone units, Temperature units, Relative humidity, and so on. If you select Carbon dioxide, then units for carbon dioxide are shown.
Metric	Air quality metrics like Carbon dioxide, Ozone, Particular Matter (PM), and so on. For example, if you select **Temperature** in Value field, metrics related to temperature are displayed.
Units	Units for the metrics selected in the Metrics filed. For example, **Parts per million** in case if you have selected Carbon dioxide in the Metric field.

4. Select **Submit**.

Configure environmental sensor data for a workplace location

Create environmental sensor data for a workplace location in Workplace Connectors. The Environmental Data (sn_wsd_wc_space_environment) table checks for air quality, temperature, and humidity levels at a workplace location.

Before you begin

Note: Seed data or out-of-the box table record is provided with the application and provides pre-filled values. If you want to create a new table record follow these steps.

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Connectors** > **Environmental Sensor** > **Environmental Data**.
2. Select **New**.
3. Fill in the form field information.

   For more information about Environmental form fields, see Environmental data form for Workplace Connectors.

4. Select **Submit**.

Archive and purge Environmental data

Use the archive rules and destroy rules to archive and purge the environmental data. Archive and purge the Environmental data (sn_wsd_wc_space_envrionment) table records.

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Before you begin

The Archive rule **Archive Environmental Data table** runs every day to archive data from the Environmental data (sn_wsd_wc_space_environment) table and archives Environmental Data table records after 48 hours. The Archive Destroy Rule **Destroy rule for sn_wsd_wc_space_environment** purges data from Archived Environmental data (sn_wsd_wc_space_environment) permanently.

Role required: admin

Procedure

1. Navigate to **All** > **System Archiving** > **Archive Rules**.
2. Select and open the **Archive Environmental Data table** rule.
3. Select the **Active** check box.
4. In the **Conditions** field, change the archive filter conditions as required.
5. From the **Related Links** section, select **Run Archive Now**.

   The data is archived in the Archived Environmental data (sn_wsd_wc_space_environment) table.
6. Navigate to **All** > **System Archiving** > **Archive Destroy Rules**.
7. Select **Destroy rule for sn_wsd_wc_space_environment**.
8. In the **Conditions** field, set the archive duration condition as required.
9. From the Related Links section, select **Run Archive Destroy Now** to run the job.

   Destroys archived records for sn_wsd_wc_space_environment table. The data table records are deleted permanently.

Workplace Connectors references

Learn more about the roles, tables, system properties, and scheduled jobs tables that are installed with Workplace Connectors.

Components installed with Workplace Connectors

Several types of components are installed with the installation of the Workplace Connectors application, including user roles and tables.

Note: The Application Files table lists the components that are installed with this application.

Roles installed with Workplace Connectors

User roles

Role title [name]	Description	Contains roles
sn_wsd_wc.manager	Provides read access to all data including Occupancy Dashboard and other dashboards.	sn_wsd_wc.user
sn_wsd_wc.admin	Provides admin access to configure and set up the Workplace Connectors application.	sn_wsd_wc.manager
sn_wsd_wc.user	Provides read access to only a few columns and fields. The read access is set up by administrators.	None

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Tables installed with Workplace Connectors

Table components

Table	Description
Providers (sn_wsd_wc_provider)	Stores Space Occupancy sensor data provided by occupancy data providers.
Connector Configuration [sn_wsd_wc_connector_config]	Configures a connector to connect with the integration framework. This configuration fetches the data from the integration to workplace applications. This table holds information about the workplace connectors that are defined in the application. For example, Badging data, Occupancy sensors, and so on. This table can also process data for each of the connectors through extension points.
Employee Attendance Data [sn_wsd_wc_employee_attendance_data]	Employee Attendance data table is the target table to which data is imported from the source table (Badging data table). This table holds badging data information of employees, like user id, badging time along with any other event defined in the connectors.
Provider Execution [sn_wsd_wc_provider_execution]	Stores all the scheduled job execution timestamps. Every time the scheduled job **Process Provider data** record runs, this table has an entry for the last query time. The time taken to import data from the source table (Badging data) to the target table (Employee attendance data) table is updated in the **Last query time**. t
Provider connector configuration [sn_wsd_wc_provider_config]	Stores provider data (Occupancy or badging). Imports data from the source table to the target table.
Connector Events [sn_wsd_wc_connector_events]	The Connector Events table (sn_wsd_wc_connector_events) loads the badging data shared by badging vendors. The Scheduled Job **Process webhook provider data records** runs every minute to load the badging data from the Connector Events table (data with State **New**) to the Employee Attendance Data table. For more information, see Configure a webhook event.
Providers (sn_wsd_wc_provider)	Stores Space Occupancy sensor data provided by occupancy data providers.

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Table components (continued)

Table	Description
Provider Space Type Mapping sn_wsd_wc_provider_space_type_mapping	Stores mapping between Workplace Core space or location records and sensor provider data records for occupancy data.
Provider Space Mapping [sn_wsd_wc_provider_space_type_mapping]	Stores Workplace Core location records.
Action Configuration [sn_wsd_wc_action_config]	Stores actions, subflows, and transform definitions from Metrikus Spoke.
Space Occupancy Data [sn_wsd_wc_space_occupancy]	Stores external Ids shared by a sensor provider, for example, Metrikus. The external Ids from sensors providers are mapped with spaces shared by Workplace Connectors.
Environmental Data [sn_wsd_wc_space_environment]	Stores data for environmental sensor data (air and temperature levels for a workplace location). For more information, see Configure environmental sensor data for a workplace location.
Unit of Measure [sn_wsd_wc_unit_of_measure]	Unit of measure for air, temperature, VOC, and so on. For more information, see Set up the Units of measure data table for environmental sensors.
Archive Environmental Data [ar_sn_wsd_wc_space_environment]	Archives environmental data. For more information see Archive and purge Environmental data.
Archive Space Occupancy [ar_sn_wsd_wc_space_occupancy]	Archives space occpancy data. For more information, see Archive and Purge space occupancy data.

Scheduled job

Navigate to **All** > **System Definition** > **Scheduled jobs**. Search for Workplace Connectors in the Application column.

- *`Process webhook provider data records`*: Runs every minute to process webhook event provider data records. For more information, see Configure a webhook event.
- *`Process provider data records`*; Runs every 5 minutes to process provider data records in Workplace Connectors.
- *`Refresh Provider Space Mapping records`*: Runs daily runs daily and executes the space filter condition on the Provider Connector configuration table for the active records where the Auto-refresh field is set to True. For more information, see Provider Connector Configuration.

Environmental data form for Workplace Connectors

Environmental sensor data form has pre-filled environmental data values and units of measure.

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Environmental Data

Field	Description	Units
Provider connector configuration	Environmental data provider sensor. For example, **Metrikus-Environment**.	NA.
Carbon dioxide	Carbon dioxide (CO2) concentration level in a workplace location.	Carbon dioxide units.
Ozone	Ozone level unit in a workplace location.	Ozone units.
Temperature	Temperature levels to measure extreme heat or cold in a workplace location.	Temperature units.
Total volatile organic compounds (TVOCs)	Unit for Volatile organic compounds (VOCs) in a location. Helps in analyzing the air quality and identifying the sources of pollution to reduce environmental exposure.	Total volatile organic compounds (TVOCs) units.
Relative humidity	Humidity levels in a workplace location. High humidity promotes growth of mold that can cause respiratory issues.	Relative humidity units.
Particulate matter 2.5	Particulate matter (PM) for fine air particles measuring PM 2.5.microns or less in diameter.	Particulate matter 2.5 units.
Particulate matter 10	Particulate matter (PM) for microscopic matter suspended in air measuring PM 10 mu or micro in diameter.	Particulate matter 10 units.
Event timestamp	Date and time for the event timestamp. Stale time sn_wsd_wc_stale_time checks if the **Event Timestamp** data has the latest timestamp. This property checks for the time beyond which the data is considered stale. Beyond the stale time, latest or current data is fetched from the data provider (for example, Metrikus Spoke).	NA

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Environmental Data (continued)

Field	Description	Units
Location	Workplace location where the environmental data sensor is installed.	NA
Query status	**Note:** This is an internal field and is used by the Workplace Connectors framework to optimize the Provider queries. This field should not be manually updated.	NA

Workplace Concierge

The Workplace Concierge application is a Workplace Service Delivery application designed to provide employees with real-time insights to optimize their workplace experience.

Get started

Explore Learn about Workplace Concierge concepts and features.	**Configure** Install Workplace Concierge to get started.	**Use** Use Workplace Concierge - Employee presence to enable employees to set routines.
Manage Manage employee routines and collaborators.	**Components** Get details about the components installed and key features of Workplace Concierge.	**Reference** Get details about the forms and lists used in Workplace Concierge.

Explore Workplace Concierge

The Workplace Concierge application is a Workplace Service Delivery application designed to provide employees with real-time insights to optimize their workplace experience.

The Workplace Concierge application helps employees plan their on-site presence, improve in-person interactions using team collaboration, and set a routine to indicate the days that they plan to be in the office. The Concierge experience, that is, the Employee Presence module is available in the Workplace Service Portal, Employee Center, and also on the Now Mobile app.

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Presence dashboard

The Presence dashboard can be used to view and optimize employee presence in the workplace. Employees can create exceptions to update their in-office days without changing their routine and create reservations on the days that they’re planning to visit the office. Facility managers can use data from the dashboard to plan office space that supports the company's work needs.

The dashboard contains a calendar section with a personalized week view that displays the following information:

- Employee routine
- Routine exceptions
- Routine exceptions at an alternate location
- Collaborators planning to be in the office
- Calendar insights about collaborators and reservations on a specific day
- Personal insights that inform employees about being in office

Presence dashboard

Note:

- Dashboard insights are generated after a set interval, which can be configured by the admin.
- Calendar insights are generated when you open the dashboard and are updated every 30 minutes.

Employee presence routine

The Workplace Concierge application enables employees to set their expected presence in the office. An employee can set the days of a week that they’re present at the office. An employee can also add their colleagues, managers, or stakeholders as collaborators to make them aware of their expected in-office presence during the week. By adding collaborators, employees can coordinate their in-office presence for better interaction, planning a meeting, or socializing.

With the help of collaboration, employees can add each other as collaborators to be aware of each other's expected in-office days. They can plan their routines based on their work progress, meetings, plannings, and more. At any time, an employee can modify their in-office routine or set an exception for better interaction with the collaborators, boosting in-person interactions and performance.

An employee can set their in-office days using the Workplace Service Portal, the Employee Center, and also the Now Mobile app.

As an admin using the Employee Presence module in the Workplace Concierge application, you can perform the following:

- Make updates at any time, if necessary.
- View the collaborators added for an employee. You can view the details of the employee to whom the collaborator is added.
- View routine-related details such as the routine start and end date. At any time, only one employee routine is active. So, when an employee updates their routine, a record is created and the old record becomes invalid and is generated with an end date.

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- View routine exceptions raised by employees.
- Add or remove sections displayed on the Presence dashboard.
- Set the first day of the week in the calendar section using the *glide.ui.date_picker.first_day_of_week* system property.
- Apply the filter on collaborators using the *sn_wsd_concierge.collaborators_filter* system property. Based on the filter, the collaborators are displayed to employees while adding a collaborator. For more information about setting the property, see Properties installed with Workplace Concierge.
- Create insights for employees, which are personalized and displayed on the Presence dashboard and the calendar section. For more information, see Create custom insights using Proactive Prompts.
- Configure the changing the Signal Configuration schedule to update interval of dashboard insights.

Workplace reservation suggestions

Workplace Concierge and Workplace Core administrators can configure workplace suggestions while suggesting a space to an employee for reservation. For more information, see Configure workplace space suggestions for employees.

The employee can set their workplace schedule and in-office preferences in Workplace Service Delivery for Mobile. When suggesting a space to an employee using the Workplace Service Delivery for Mobile, application uses these preferences. For more information see, Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile.

Configure Workplace Concierge

Install and configure the Workplace Concierge application.

Install Workplace Concierge

Install the Workplace Concierge application from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.

2. Verify that the Workplace Core plugin is activated.

Use the following details when required:

- Name of the application: Workplace Concierge
- ID of the application: sn_wsd_concierge

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.

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Search for the application by its name (Workplace Concierge or ID (sn_wsd_concierge). If you cannot find the application, you may have to request it from the ServiceNow Store.

3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Concierge.
5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Configure calendar sections on the Presence dashboard

As an admin, add or remove calendar sections from the Presence dashboard.

Before you begin

Role required: sn_wsd_concierge.admin

Procedure

1. Navigate to **All** > **Employee Presence** > **Calendar Sections**.
   The default calendar sections are as follows:
   - WSD Presence Collaboration Section
   - WSD Presence Exception Section
   - WSD Presence Insights Section
   - WSD Presence Reservation Section

   Note:
   - The WSD Insights Section is available if you've installed Proactive Prompts.
   - The WSD Presence Reservation Section is available if you've installed Workplace Reservation Management.

2. Change the section order of appearance by editing the values in the Order column.
3. **Optional:** Add a section to the calendar.

   Important: Adding a widget that is not optimized for the Presence Dashboard can lead to unexpected results in the UI. If you want to create a widget, make sure that you copy and modify a default widget.

   a. From the Employee Presence Calendar Widgets table, select **New**.

   b. On the Employee Presence Calendar Widget form, fill in the fields.
   For a description of the field values, see Employee Presence Calendar Widget form.

   c. Select **Submit**.

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Configure workplace space suggestions for employees

Configure the workplace space suggestions table to fetch workspace suggestions. Application provides workspace suggestions based on employee preferences when they are reserving a space.

Workplace Concierge and Workplace Core administrators can configure workplace suggestions while suggesting a space to an employee. Employees can have access to a space matching their needs to complete a set of activity like reserving a space, selecting their in-office presence days, preferred collaborators, and workplace services.

Note: The option to add your workplace preferences and suggestions are also available on the Employee Center portal. Employees are expected to use the Workplace Service Delivery for Mobile app to reserve a space and to view or modify their preferred workplace locations and workplace schedule suggestions. Reserve a workspace using the Workplace Service Delivery for Mobile app. Get desk suggestions based on your preferred location, past and future reservations, proximity (preferred collaborators), favorite spaces, neighborhoods, and standard services.

When an employee searches for a workspace using Workplace Service Delivery for Mobile, the application provides space suggestions to an employee based on the following criteria:

- Availability of the space based on the Reservable module (Desks) configuration in Workplace Reservation Management
- Employee presence preferences set in Workplace Concierge for primarily (or solely) suggesting the building or location the employee plans to visit while in office.
- Favorite locations (campus, building, floor, or neighborhoods) set by an employee
- Preferred workplace services added in workplace preferences
- Past and future reservations data
- Proximity (preferred collaborators)
- Workplace services

The employee can set their workplace schedule and in-office preferences in Workplace Service Delivery for Mobile. When suggesting a space to an employee, application uses these preferences. For more information see, Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile.

Related topics

Components installed with Workplace Core

Properties installed with Workplace Concierge

Set Employee Presence

User Space Suggestions

Employee recommended workspace suggestions are cached in the User Space Suggestions (sn_wsd_core_user_space_suggestions) table record. This table gets automatically updated when employees use the workplace preferences option to update their reservations, workplace services, presence and collaborators information. Application uses this cached data while proposing a workspace suggestion to an employee.

Before you begin

The following plugins are required:

- Workplace Core
- Workplace Concierge

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- Workplace Reservation Management
- Workplace Space Management

Note: Administrators don't have to configure or make updates to this table record. The data in this table is automatically updated based on the employee presence and workplace preferences data.

Role required: sn_wsd_core.admin, sn_wsd_concierge.admin

Procedure

1. Navigate to **All** > **Workplace Concierge** > **Workplace Suggestions** > **User Space Suggestions**.

   Note: The table record summarization is for illustration only and administrators don't have to make changes to this record.

2. Select **New**.
   In the User Space suggestions new record, complete the following field information.

User Space Suggestions

Field	Description
User	Indicates an employee user.
Space types	Indicates the Space type column option in the Spaces table record. For example, Workplace/Desks. For more information, see: ○ Properties installed with Workplace Concierge ○ Add a space using Workplace Space Management ○ Add a space type configuration
Building	Indicates the building proposed to an employee or a building selected by an employee based on workplace preferences and suggestions. For more information, see Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile and Set Employee Presence.
Suggestions	System ID of the default Reservable module that is used. For example, the **Desks** Reservable module.

Note: The cached data in the User Space suggestions (sn_wsd_core_user_space_suggestions) is purged after 48 hours by the application.

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Related topics

Set Employee Presence

Manage your in-office presence preferences

Create a reservation for a day in Workplace

Space suggestion Configuration

Administrators can configure space suggestions for employees to help employees reserve their preferred workspace. Employees can reserve a workspace based on their preferences using the Workplace Service Delivery for Mobile app. Workplace suggestions for an employee are derived from employee presence data, location preferences, employee's favorite workspaces, past and future reservation data, preferred collaborators, and standard services.

Before you begin

The following plugins are required:

- Workplace Core
- Workplace Concierge
- Workplace Reservation Management
- Workplace Space Management

Note: Load the demo data available with Workplace Core after installing the application. The demo data available with Workplace Core provides sample data types to illustrate Space Suggestion Configuration table [sn_wsd_core_space_suggestion_configuration] use. If you're using demo data or product data (seed data), some fields are pre-filled. If you aren't using the demo data, you can configure the space suggestions table record as required.

Role required: sn_wsd_core.admin, sn_wsd_concierge.admin

Procedure

1. Navigate to **All** > **Workplace Concierge** > **Workplace Suggestions** > **Space Suggestion Configuration**.
2. Select **New**.
3. Fill in the form fields.

Note: Make sure only one record exist for each preference type.

Space Suggestion Configuration

Field	Description
Suggestion type	Option to select a suggestion type to display preferred workplace suggestions to employees in the search results when they are reserving a space. Select any of the following Suggestion types: ○ Location: Location set in the Employee's workplace profile is suggested as the preferred workplace location. Employees can change their preferred location (Campus, building, Floor) pm the in-office

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Field	Description
	preferences tab on Workplace Service Delivery for Mobile. ○ Favorites: Workspaces set as favorite by an employee is prioritized and favorite spaces show up first in the search results when an employee searches for a workspace. ○ Past and Future reservations: Workspace suggestions based on employee's past and future reservation data is considered and prioritized while suggesting a space to an employee. ○ Proximity: Employee's preferred workplace collaborators. Preferred collaborators and their in-office days or workday schedule is taken into consideration when proposing a space to an employee. ○ Standard services: Workspace suggestion based on preferred workplace services by an employee. For more information, see Manage your in-office presence preferences and Set Employee Presence.
Weight	Option to provide a weight (integer value) to prioritize the suggestion type while proposing a space to an employee. If the weight given is higher for a **Suggestion type**, application uses the higher weight to prioritize and suggest a space in the search results when proposing a workspace to an employee. Suggestion types with higher weight are ranked first in the search results when an employee searches for a space. For example, if the Suggestion type **Location** is having the weight value of 33, **Proximity** has 32, and **Favorites** has 12, **Location** is given more preference and ranked higher in the search result. Employee's preferred location is suggested first to an employee in the search results, followed by **Proximity**, and **Favorites**.
Active	Option to set the check box value to true.
Suggestion Tag	Option to add a tag or label for a space suggestion type. For example,the tags can be added as**Preferred services**, **Near Collaborators**, **Preferred location**, **Your favorite**,**Reserved frequently**, and so on. The tags are displayed on the **Desk suggestions** card in Workplace Service Delivery for Mobile.

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Field	Description
	For more information, see Create a reservation for a day in Workplace.

4. Select **Submit**.
5. Set the properties in Workplace Concierge for employee to enable workplace suggestion types.
   For more information, see Properties installed with Workplace Concierge.

   After the configuration is complete and required properties are enabled, employees can start managing their workplace schedule and preferences. For more information, see Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile.

Related topics

Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile

Components installed with Workplace Core

Set Employee Presence

Manage Workplace Concierge - Employee Presence

Manage Employee routines, collaborators, and exceptions. Monitor the routines, collaborators, and exceptions created by employees.

View employee presence modules

Track the routines and exceptions created by employees and the collaborators added by employees.

Before you begin

Role required: sn_wsd_concierge.admin

About this task

Using the Employee Presence module, you can perform the following:

- Add or view routine details such as the workplace profile associated with the routine, routine start and end time, and the in-office days set in the routine.
- Add or view the presence exceptions for employee in-office days or remote days.
- Add or view collaborators added by employees.

Procedure

1. Navigate to **All** > **Employee Presence**.
2. View employee routines by selecting the Routines module.
   A list of routines created in the application is displayed.

   Note: The list contains a filter that hides inactive routines.

3. View the routine exceptions by selecting the Exceptions module.
   A list of exceptions created by employees is displayed.

   Note: Records that are older than six months are removed from the list.

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4. View the collaborators of employees by selecting the Collaborators module.
   A list of your collaborators is displayed.

Create custom insights using Proactive Prompts

Use Proactive Prompts to create insight sections for the employee presence dashboard.

Before you begin

Note: To create insights, you must install Proactive Prompts version 3.1 or later.

Role required: admin

About this task

As an admin, you can use Proactive Prompts to create insights for employees. These insights are displayed on the presence dashboard and the calendar sections. For more information about Proactive Prompts, see Proactive Prompts.

For information about the default insights installed with Workplace Concierge, see Insights installed with Workplace Concierge.

Procedure

1. Create a signal data source for the insight.
   For more information, see Create a data source for a signal in Proactive Prompts.
2. Navigate to **All** > **Proactive Prompts** > **Signal Configurations**.
3. Select **New**.
4. In the **Channels and actions** field, enter `Presence dashboard`.
5. In the **Category tags** field, enter one of the following values.
   - Presence Calendar Insight: Creates an insight for the calendar section of the presence dashboard.
   - Presence Dashboard Insight: Creates an insight for the presence dashboard.
6. In the **Datasource** field, select the signal data source that you created earlier.
7. In the **Schedule** field, select the **On demand** schedule.

   Note: The on demand schedule is applicable for Calendar insights. For more information about signal schedules, see Configure signal schedules in Proactive Prompts.

8. From the **Receiving user** list, select **Employee**.
9. Fill in the remaining fields based on your requirement, then select **Submit**.

   For a description of the field values, see Signal configuration form.

   For more information about creating a signal configuration, see Create a signal in Proactive Prompts.

Result

You've configured a signal that displays the insight to the user in the scheduled frequency.

Set Employee Presence

Set your in-office days. Collaborate with your coworkers and plan your meeting and in-offce collaborations efficiently.

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Set in-office days

As an employee, using the Workplace Service Portal and the Employee Center, you can set your presence at the office.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the employee presence dashboard from one of the following locations.

Location	Navigation
Workplace Service Portal	**a.** Navigate to **All** > **Workplace Core** > **Workplace service portal**. The portal homepage opens. **b.** Open the Site safety category. **i.** Select **Catalog**. **ii.** Select **Browse by Categories**. **iii.** In the Workplace Services Catalog, select **Site safety**. **Note:** If there are multiple catalogs configured on the portal, go to the Catalogs list and select **Workplace Services Catalog** > **Site safety**. **c.** Select **Employee Presence**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the Employee Center landing home page, select the **Workplace Services** > **Site Safety**. **c.** Select **Employee Presence**

2. On the Presence dashboard page, select **Manage your settings** to open the Add Routine window.

   Note: If you're visiting the dashboard for the first time, select **Get Started**.

3. Under the In-office days section, select the days of the week when you're planning to be at the office.

   Example
   For example, if you're planning to be in the office on Monday and Wednesday, select **MO** and **WE**.

4. After setting the days, select **Save**.
   The selection is saved.

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5. **Optional:** You can also add a co-worker as your collaborator and view on what days they're present in the office.
   For more information, refer to Add a collaborator.

Result

You have set your in-office days. At any time, you can modify your selection, for more information, refer to Update your in-office days.

Add a collaborator

Coordinate your in-office days with your co-workers. Add them as your collaborators and view the days that your co-workers are present at the office.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the Presence dashboard.
   For more information, see the steps mentioned here.
2. On the Presence dashboard page, open the Add Routine window by selecting **Manage your settings**.

   Note: If you're visiting the dashboard for the first time, select **Get Started**.

3. **Optional:** Add collaborators from the Suggested Collaborators section.

   Note: Suggested collaborators appear after you've added collaborators and reopened the Add Routine window.

4. In the Collaborators section, search for the employee that you want to add as a collaborator.
5. Select the employee from the search results.
   The employee is saved as your collaborator.

Result

The selected employees are added as your collaborators. You can view their in-office routine from the Employee Presence page.

At any time, you can also remove a collaborator. For more information, see Remove a collaborator.

Update your in-office days

Update your in-office days at any time using the Presence dashboard.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the Presence dashboard.
   For more information, see the steps mentioned here.
2. On the Presence dashboard, open the Add Routine window by selecting **Manage your settings**.
3. In the In-office days section, change your existing selections based on your requirement.

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- Select a day to set your in-office presence.
- Clear a selection to set a remote presence.

4. After setting the days, select **Save**.
   The selection is updated.

Remove a collaborator

Remove an existing collaborator if you don't want to know they routine anymore.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the employee presence dashboard.
   For more information, see the steps mentioned here.
2. On the Presence dashboard page, select **Manage your settings** to open the Add Routine window.
3. In the Collaborators section, under Selected Collaborators, remove a collaborator by selecting the Remove collaborator icon (✕).
4. In the confirmation window, select **Yes, remove**.

Result

The collaborator is removed from your routine.

Update your in-office days as exceptions

As an employee, use the presence dashboard to update your in-office days without changing your routine.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to the employee presence dashboard.
   For more information, see the steps mentioned here.
2. Navigate to the day that you want to update.

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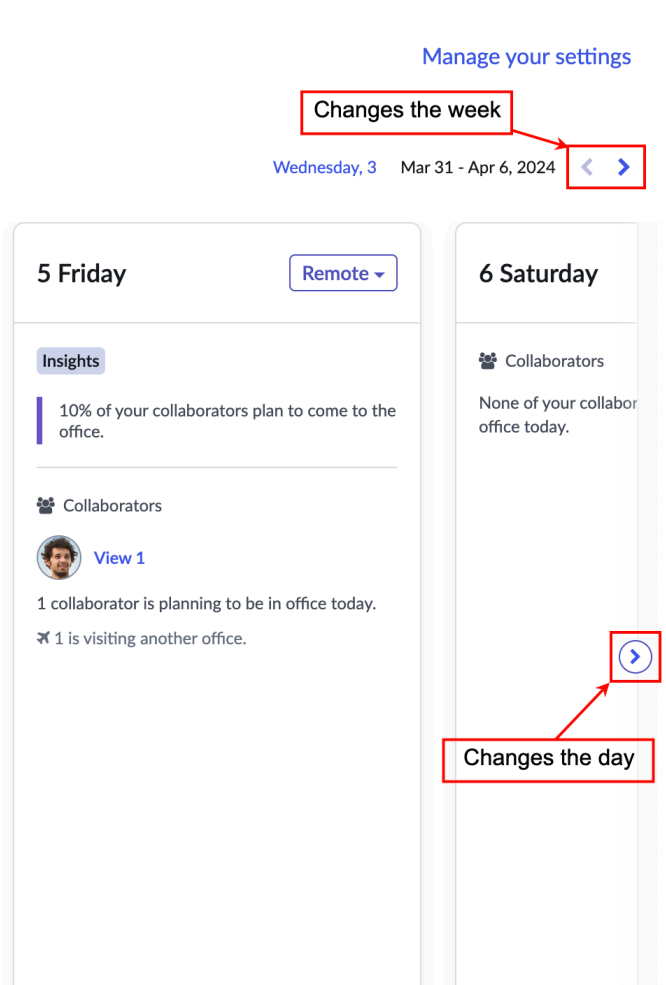
- Use the navigation arrows to change the day or week of the calendar.



- Navigate to the current day by selecting the date link.

3. From the drop-down list of the calendar card, select one of the following options.
   - Select **Remote** to change your presence to remote.
   - Select **In-office** to change your presence to your assigned office.
   - Select **Visit another office** to change your presence to an office different from your assigned office, and then select the office that you'll visit.

   An exception is automatically created for the selected day and your presence is updated.
4. **Optional:** Select **Make a reservation** to reserve a space for the day you're visiting the office. For information about making a reservation, see Create a reservation.

Managing presence privacy settings

Manage whether employees can view your in-office presence by selecting your privacy settings.

If you set your presence to private, your routine is hidden from other employees, and you aren't displayed as a collaborator on the Presence dashboard calendar.

Manage privacy settings from the Presence dashboard

Manage your privacy settings from the Presence dashboard.

Before you begin

Role required: sn_wsd_core.workplace_user

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Procedure

1. Navigate to the Presence dashboard.
   For more information, see the steps mentioned here.
2. On the Presence dashboard, open the Add Routine window by selecting **Manage your settings**.

   Note: If you're visiting the dashboard for the first time, select **Get Started**.

3. In the Privacy settings section, select one of the following options based on your preference.
   - Public mode: Other employees can see your routine on the Presence dashboard and Collaborators section.
   - Private mode: Other employees can't see your routine.

   The selected privacy option is automatically saved.

Manage privacy settings from Employee Profile

Manage your privacy settings from the Employee Profile application.

Before you begin

An admin must opt in to Employee Profile. For more information, see Opt in to the employee profile.

Role required: sn_wsd_core.workplace_user

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. On the Employee Center home page, select your profile, then select **Preferences**.
3. In the Presence user preferences section, from the Presence privacy list, select either of the following options.
   - Public mode: Other employees can see your routine on the Presence dashboard and Collaborators section.
   - Private mode: Other employees can't see your routine.

Workplace Concierge - Components

Learn more about the components and the properties installed with Workplace Concierge application.

Components installed with Workplace Concierge

Several types of components are installed with activation of the Workplace Concierge application, including tables, user roles, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Roles installed with Workplace Concierge

Workplace Concierge roles

Role title [name]	Description	Contains roles
sn_wsd_concierge.admin	Has complete access to the application.	sn_wsd_core.profile_writer

Tables installed with Workplace Concierge

Workplace Concierge tables

Table	Description
Employee Presence Routine [sn_wsd_concierge_employee_presence_routine]	Stores information about all the Employee Presence routines created in the application.
Employee Presence Exceptions	If the presence status is changed from **In-office** to **Remote**, a record is created in the Employee Presence Exceptions table (**All** > **Workplace Concierge** > **Employee Presence** > **Exceptions**). If the presence status is changed from "**In-office** or **Remote**" to "**Visit another office**," a record is created in the Employee Presence Exceptions table and Location column is updated with the building name for the **In-office** day. For more information, see Manage workplace schedule and in-office presence using Workplace Service Delivery for Mobile.

Properties installed with Workplace Concierge

Customize the system properties available with Workplace Concierge as required.

Configure Workplace Concierge properties for improved workspace suggestions. The preferred workplace suggestions are shown to an employee in the search results. Employees can select a suggested workspace while reserving a space using the Workplace Service Delivery for Mobile app. The workspace suggestions are also based on user workplace profile location preferences, employee presence configuration, user space table and space suggestions table configuration, and future and past reservations.

Following properties are installed with Workplace Concierge.

Note: The Workplace Concierge properties are available in **All** > **Workplace Concierge** > **Administration** > **Properties.**. These properties are also available in the the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter context menu.

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Workplace Concierge properties

Property	Description
Collaborators filter [sn_wsd_concierge.collaborators_filter]	Property to add a collaborator for a workp filters as required to add workplace users to true.
Allow user to have parallel reservation from desk suggestions card on workplace page [sn_wsd_concierge.allow_overlapping_reservations]	Property to allow a parallel or multiple de Desk suggestions card in Workplace Serv By default, this property is set to true. If it have multiple or parallel desk reservation Suggestions card. After reserving a spac Suggestions for other workspaces. By default, allow_overlapping_reservatio not selected or is false, after making a res is hidden. A message is displayed "Reser on <calendar date>, <calendar weekday> shows Space suggestions facet. If this pr Suggestions facet is visible. For more info for a day in Workplace.
Specifies the number of past days to consider when generating reservation suggestions for the user [sn_wsd_concierge.suggestions_reservation_past_days_to_consider]	Specifies the maximum number of past d proposing a workspace to an employees. users to have parallel reservations from t set to True or False (Check or Uncheck). For more information, see Configure a res
List of space types that are used when suggesting available spaces to employees to reserve. [sn_wsd_concierge.suggestions_space_types]	Space type record that is used while sugg for reservation. By default, Space type su **Workspace/Desk** Reservable Module Co The list of space types determines which for reservation. For example: 5f017383eb By default, the **Desks** Reservable Module are shown. Employees can see suggestio included in the Desks Reservable Modul page. For more information, see Workpla To include other Reservable Module Con Meeting rooms, add the Sys ID of the Roo This property can take comma separated List of space types: 5f017383eb512010b89bfdfc9c5228c8,20 Set the **Available-in** Reservable Module **experience** in the Reservable module Co enabled at the Reservable module level. for the **Desks** Reservable Module Config For more information, see Configure a res workplace schedule and in-office presen for Mobile. For more information, see:

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Workplace Concierge properties (continued)

Property	Description
	• Add a space type configuration • Add a space using Workplace Space M • Space suggestion Configuration • Manage workplace schedule and in-of Service Delivery for Mobile.
The maximum number of days an employee can select at once through the Workplace experience [sn_wsd_concierge.workplace_day_selection_limit]	Option to enter the maximum number of calendar component in the Workplace pa Default value is 10 days. Negative value (information, see Manage workplace sche Workplace Service Delivery for Mobile. When this property is set, the **Select mul** on the Workplace page. Employees can s for making bulk reservations. For exampl employees can see 5 In-office days selec The employee can auto-select days or da maximum allowed selected days in this p If there is no date selected, the system sh date and try to select all days until the ma When an employee removes a date from removed from the Space Suggestions list

Insights installed with Workplace Concierge

The following insights are installed with the Workplace Concierge and Proactive Prompts plugins.

Installing the Workplace Concierge plugin with the Proactive Prompts plugin creates records in the following tables.

Signal Configuration [sn_pp_signal_config] table

Signal Configuration	Description
Employee reservations insight	Displays a message if the employee has a reservation on a day that is set to Remote. This insight is displayed in the calendar week view.
Percentage of collaborators in the office	Displays the percentage of collaborators that are in the office on a specific day. This insight is displayed in the calendar week view.
Routine compliance	Displays a message if the employee presence isn't set to five days in the office. This insight is displayed on the Presence dashboard. This signal configuration is scheduled to run every week. After updating the routine, employees can still see the insight until the

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Signal Configuration [sn_pp_signal_config] table (continued)

Signal Configuration	Description
	following week. This issue can be resolved by changing the schedule.

Signal Data Source [sn_pp_signal_data_source] table

Signal Data Source	Description
Collaborator data source	Data source for the Percentage of collaborators in the office signal configuration.
Employee reservations	Data source for the Employee reservations insight signal configuration.
Routine compliance	Data source for the Routine compliance signal configuration.

Signal Channel Configuration [sn_pp_signal_channel_config] table

Signal Channel Configuration	Description
Presence dashboard	Channel configuration for the Presence dashboard in the Workplace Concierge application.

Signal Category [sn_pp_signal_category] table

Presence Calendar Insight	Displays the insight in the calendar week view.
Presence Dashboard Insight	Displays the insight on the Presence dashboard.

Workplace Concierge reference

Reference topics provide additional information about the forms and lists used in the Workplace Concierge application.

Employee Presence Calendar Widget form

You can use the Employee Presence Calendar Widget form to add a widget to the calendar section on the Presence dashboard.

Employee Presence Calendar Widget form

Field	Description
Name	Name of the section.
Order	Order in which the section is displayed on the Presence dashboard.
Description	Description of the section.
Widget	Widget that is displayed in the section.

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Employee Presence Calendar Widget form (continued)

Field	Description
User criteria	User criteria to decide which users can see the section.
Widget Parameters	Parameters passed to the widget.
Active	Option to activate the section on the Presence dashboard.

Workplace Agent for mobile

Manage all your workplace cases and tasks using the Workplace Agent for mobile application on your mobile device.

Get started

Explore Learn about Workplace Agent for mobile.	**Configure** Install Workplace Agent for mobile to get started.
Use Use Workplace Agent for mobile to manage, edit, update and resolve workplace cases	**Components** Know about the key features of Workplace Agent for mobile.

Explore Workplace Agent for mobile

Manage all your workplace cases and tasks on the go using the Agent Workplace Services for Mobile application on the ServiceNow Agent mobile application. As a workplace agent, the application enables you to view, manage, and create workplace cases using your mobile device instead of a desktop or a laptop.

The Workplace Agent for mobile application on the ServiceNow Agent mobile application enables you to work on the workplace cases created in the Workplace Service Delivery applications. You can manage and create workplace cases, case tasks, move tasks, and maintenance tasks using the application.

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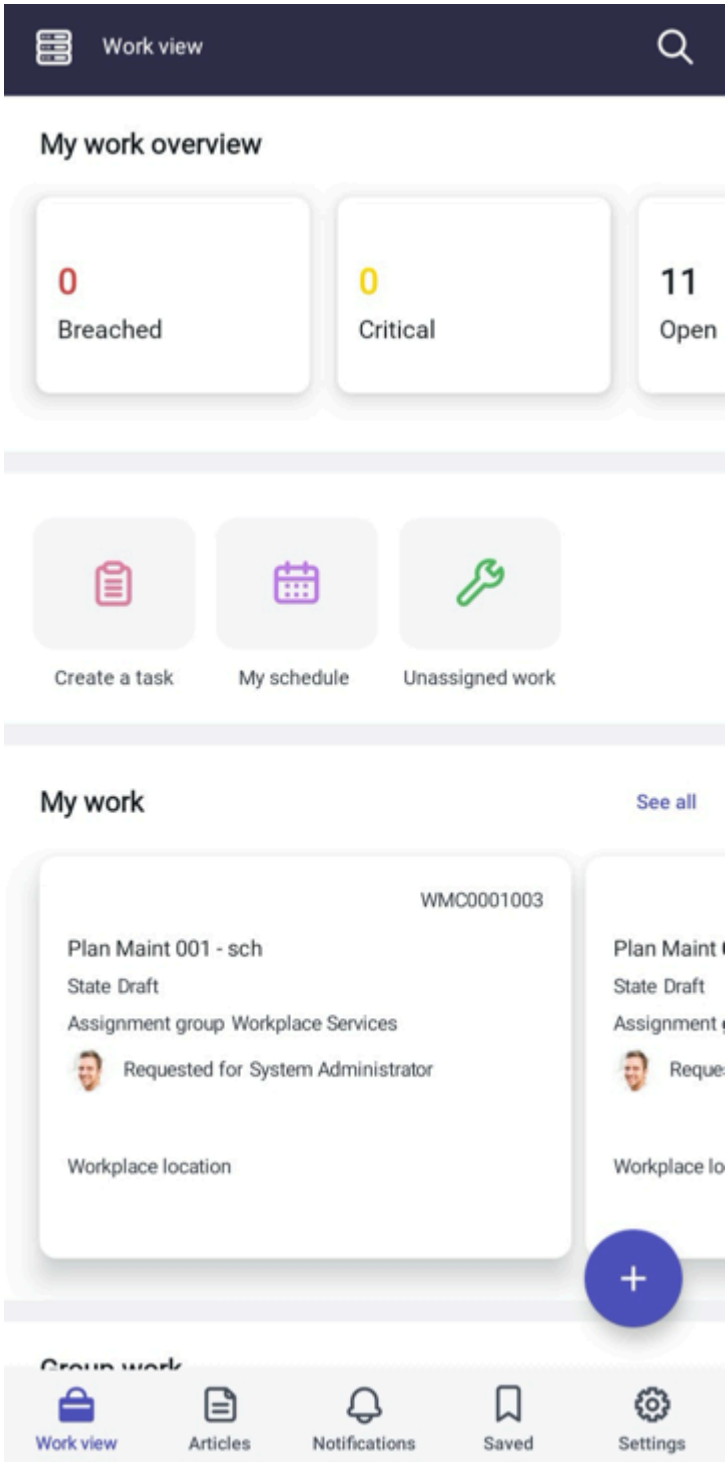

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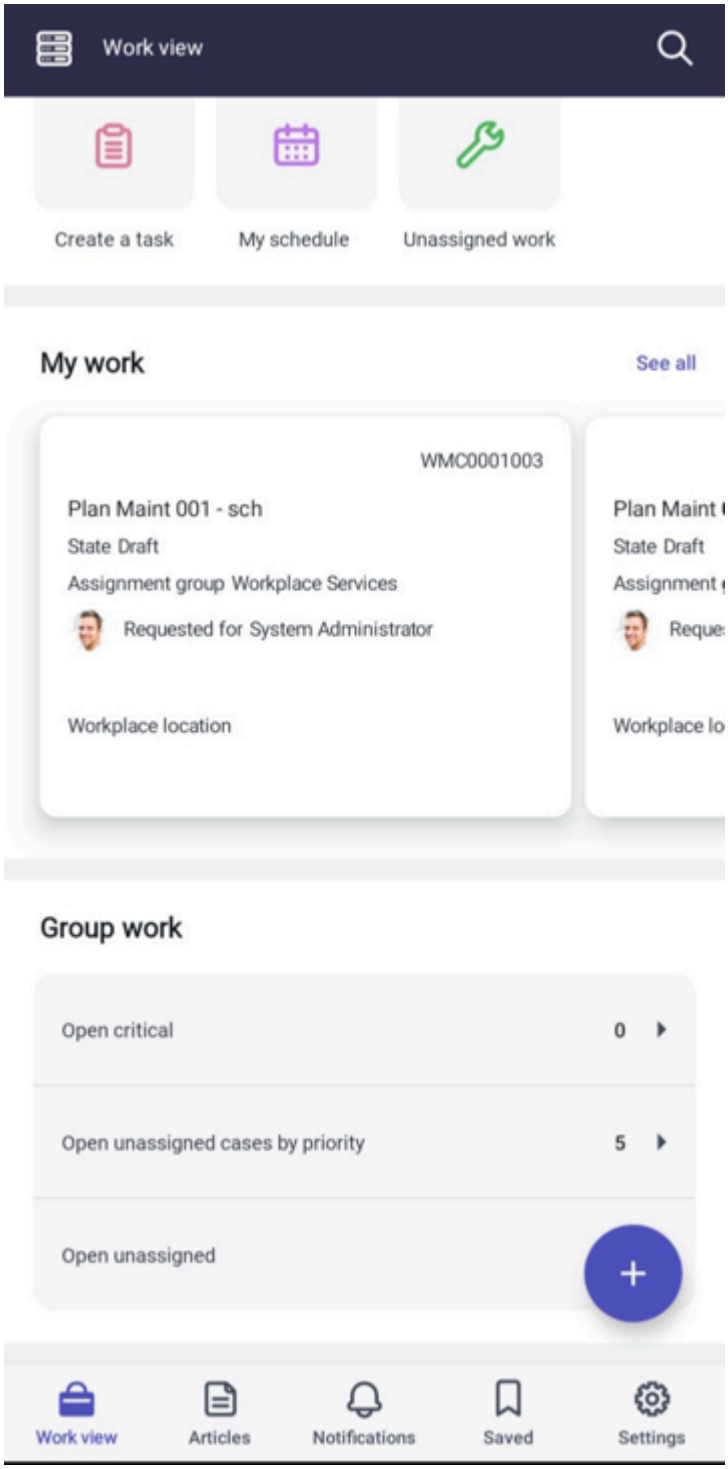

As a workplace agent, the application enables you to perform the following actions:

- You can view all the workplace cases created using the applications.
- The application displays the cases in the following categories:
  - Your work overview with numbers.
  - Your assigned work with the details of the cases.
  - Your assignment group's work.
  - Unassigned work in your assignment group.
- You can work on the cases assigned to you based on their state such as Critical, Open, Resolved

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- You can assign cases and tasks to another workplace agent.
- You can update cases and tasks on the go whenever you progress on it or to add any extra information.
- You can navigate to the workplace location on which the workplace case or task is created using the map location. For a move case, you can view both the 'From location' and the 'To location'.
- For a maintenance case, you can view details such as the asset included, product's model and more.
- You can also handle workplace cases and tasks that are associated with the cases individually.
- You can upload attachments to a case at any time.

For more information about the Workplace Agent for mobile application features, refer to Workplace Agent for mobile - Key features, actions, and case details

Configure Workplace Agent for mobile

Install the Workplace Agent for mobile application to start using it on the ServiceNow Agent mobile application.

Install Workplace Agent for mobile

Install the Workplace Agent for mobile application from ServiceNow Store applications. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.

2. Verify that the following plugins are activated:
   - Workplace Core (sn_wsd_core)
   - Workplace Case Management (sn_wsd_case)
   - Workplace Maintenance Management (sn_wsd_maintenance)
   - Workplace Move Management (sn_wsd_move)
   - Workplace Indoor Mapping (sn_wsd_indoor_map)
   - Expanded Model and Asset Classes(sn_ent)

Use the following details when required:

- Name of the application: Workplace Agent for mobile
- ID of the application: sn_wsd_agent_mob

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application using the filter criteria and search bar.

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You can search for the application by its name or ID. If you cannot find an application, you may have to request it from ServiceNow store.

Visit the ServiceNow Store website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. Click **Install**.
4. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If there are any plugins or applications that need to be installed, you must install them before you can install Workplace Case Management.

5. **Optional:** If demo data is available and you want to install it, click **Load demo data**.

   (Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

   Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Click **Install**.

Use Workplace Agent for mobile

Use the Workplace Agent for mobile to perform workplace case or task related activities using the ServiceNow Agent mobile application.

Manage workplace cases and tasks

Track the workplace cases and tasks that are assigned to you and your assignment group. Know the number of cases that are open, critical, and breached at any time. View the details of the case and perform an action accordingly.

Before you begin

Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

About this task

The ServiceNow Agent - Workplace Agent for mobile application enables you to manage the workplace cases and tasks that are assigned to you on the go without the need of a desktop or laptop. You can manage any type of workplace cases such as regular workplace case, maintenance case, move case, space configuration case and reservation case. The application provides you with a category-based display where you can quickly access the works assigned to you and to your assignment group easily. The **Work view** of the application displays your work, your group work, and unassigned work.

For detailed information about the available features, refer to Workplace Agent for mobile - Key features, actions, and case details.

Procedure

1. Log in to Workplace Agent for mobile application.
   The launch screen opens with your **Work view**.

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2. On the **Work view** page, depending on what cases or tasks you want to check, you can choose from the following options.

Section	Actions
My work overview	Check the reports of workplace cases that are assigned to you. Select from the following reports to know more information: ○ Select **Breached** to view the workplace cas es that have breached the set SLAs. ○ Select **Critical** to view the workplace cases that are critical and require attention. ○ Select **Open** to view the cases that you have opened and work in progress. ○ Select **Resolved** to view the total number of cases that you have resolved. ○ Select **All**to view all the cases irrespective of their status. The details of the cases are displayed when you select the card. You can further select the case to view the case details in a separate page.
My work	○ Swipe right through the section to view the details of all the cases and tasks that are as signed to you. ○ To view the details in a list, select the **See all** option. ○ You can select the case details card to open the details in a separate page and per form any action. On the page, use the filter to view cases and tasks separately. **a.** Select the Filter icon (). **b.** To apply a filter on the workplace cases, select **Workplace case**.
Group work	Go to the **Group work** section to view the cases and tasks assigned to the assignment group to which you belong. Select from the following: ○ **Open critical**: Select this option to view all the critical cases assigned to your assign ment group. ○ **Open unassigned cases by priority**: Select this option to view a list of unassigned work place cases of your assignment group.

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Section	Actions
	▪ You can view the cases by their priority. ▪ You can select a case at any time and as sign it to yourself or to any agent if neces sary. ○ **Open unassigned**: Select this open to view both cases and tasks that are unassigned.
Unassigned work	Go to the **Unassigned work** section to view the details of all the cases and tasks that are currently not assigned to any agent within your assignment group. ○ Select **See all** to view all the cases and tasks in a list on a separate page. ○ Select the case or task to open it in a sepa rate page. On the page, you can assign the case to yourself or make any updates.

3. To check the knowledge articles added by your organization, select the **Article** tab at the bottom.
   The Articles page opens
4. To view the notifications regarding cases that have breached SLAs or any other, select the **Notifications** tab at the bottom.
   The Notifications page opens. The page displays the following notifications:
   - Case- Assigned to individual
   - Case- Assigned to group
   - Case commented- to Assignee
   - Case escalated– If SLA is breached for a case, a notification is sent to the assignee.

   Select **Delete all** to delete the notifications if they're no longer required.
5. To view the saved cases, tasks, or any attachments, select the **Saved** tab at the bottom.
   The Saved page opens displaying all the cases, tasks, and attachments that you have saved.
6. To log out or make any profile-related settings, select the **Settings** tab at the bottom.

Assign an unassigned case or task

Work on an unassigned case or task. Assign the case or task to yourself or to another agent.

Before you begin

Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

About this task

Assign unassigned cases or tasks to yourself or to another workplace agent who belong to your assignment group. You can work on any type of workplace case such as regular workplace case, maintenance case, move case, space configuration case, reservation case, and tasks associated with these cases.

Procedure

1. Log in to Workplace Agent for mobile application.
   The launch screen opens with your **Work view**.

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2. On the **Work view** page, to view unassigned cases, do one of the following:

   a. Go to the **Group work** section and select any of the following:

      i. Select **Open unassigned cases by priority** or **Open unassigned** to view a list of unassigned workplace cases and tasks.

      A list of workplace cases and tasks is displayed. Select the  filter icon to filter the cases or tasks.

      ii. **Apply** the changes.

   b. **Optional:** You can also go to the **Unassigned work** section to view the cases and tasks that are unassigned.

3. Select the workplace case/task that you want to assign.
   Based on the selection, the case details page or the task details page opens.
4. To assign the case/task to yourself, on the details page, select **Assign to me**.

   Note: The **Assign to me** option is available only for a workplace case.

5. To assign the case/task to another agent, select the  action icon on the top-right corner of the header.
6. From the menu, select **Assign case**.
   A list of users is displayed in a separate page where you can search and select the agent to whom you want to assign the case/task.
7. Select **Submit**.
   The case/task is assigned to the select agent.

Edit or view case details on the Workplace Agent for mobile app

Update a workplace case at any time on the go. The application provides you with all the edit-related options to make relevant changes whenever you want to edit.

Before you begin

Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

About this task

The application enables you to edit any type of workplace case such as a regular workplace case, maintenance case, move case, space configuration case, and reservation case.

For information about all the details, related lists and actions that are available on a case details page, refer to Workplace Agent for mobile - Key features, actions, and case details.

Procedure

1. Log in to Agent Workplace Service for Mobile application.
   The launch screen opens with your **Work view**.
2. On the **Work view** page, go to any one of the following sections to open the case that you want to edit:
   - My work overview
   - My work

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- Group work
- Unassigned work

3. Select the case that you want to edit.
   The case details page of the selected case opens separately.
4. To edit the fields of the case, do the following:

   a. Select **Edit** to edit the case.
   The Edit case form opens with the existing fields.

   b. On the form, change the fields that you want to edit.
   You can edit fields based on the type of case you're handling.

   c. Select **Submit**.
   The case is edited.

5. To add a comment, do the following:

   a. Select **Comment**.
   You can also select the  icon on the top-right of the header and select **Add comment**.

   b. On the Add Comment page, enter your notes and comments in the **Work notes** and **Additional comments (Customer visible)** fields respectively.

   c. Select **Post**.
   The comment is posted on the case.

6. To perform other actions, select the  icon on the top right of the header and do the following:

   a. To attach a knowledge base article, select **Attach Knowledge**.

      i. On the Attach knowledge page, search for the article that you want to attach and select it.

      ii. Select **Submit**.
      The knowledge base article is attached to the case.

   b. To create a child task, select **Create task**.

      i. On the Create a task form, enter the details. For more information, refer to Create a child task.

      ii. Select **Submit**.
      The child task is created for the case.

   c. To update the checklist of the case, select **Update checklist**.
   On the Checklist page, select the checklist items that you want to add. On the page, the selected checklist items are marked as completed.

   d. To update the current state of the case, select **Update state**.

      i. On the Update state form, select the state to which you want to update the case.

      ii. Select **Submit**.
      The state is updated.

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e. To view, add, or edit the attachments, select **View attachments**.
   i. On the Attachment page, view the list of attachments.
   ii. To edit an attachment, select the icon.
   iii. To delete an attachment, select the icon.
   iv. To preview an image, select the image directly.

7. To save the case for quick reference, select the icon.
   The case is saved. You can select the **Saved** tab at the bottom of the screen to view the case.

Print workplace cases

Workplace agents can print the workplace case at any time on the go. The case reports contain reservation details, services, and all other relevant information.

Before you begin

Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

Procedure

1. Log in to Workplace Agent for mobile application.
   The launch screen opens with your **Work view**.
2. On the **Work view** page, go to any one of the following sections to open the case to which you want to add a child task.
   - My work overview
   - My work
   - Group work
   - Unassigned work
3. Select the case.
   The case details page of the selected case opens separately.
4. Select the icon on the top right of the header.
5. Select **Print case**.
   A confirmation message appears.
6. Select **Yes**.
   The downloaded document displays the workplace case details.

Print workplace tasks

Workplace agents can print the workplace task details related to a workplace case. The task reports contain reservation details, services, and all other relevant information.

Before you begin

Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

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Procedure

1. Log in to Workplace Agent for mobile application.
   The launch screen opens with your **Work view**.
2. On the **Work view** page, go to any one of the following sections to view the cases and tasks.
   - My work overview
   - My work
   - Group work
   - Unassigned work
3. **Optional:** If you know the parent case of the task, select the case.
   The case details page opens separately.
4. Select the task.
   The task details page opens separately.
5. Select **Print task**.
   A confirmation message appears.
6. Select **Yes**.
   The downloaded document displays the workplace task details.

Create a child task

Add child tasks to a workplace case when needed. The application enables you to create a child task instantly from the case details page.

Before you begin

Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

Procedure

1. Log in to Agent Workplace Service for Mobile application.
   The launch screen opens with your **Work view**.
2. On the **Work view** page, go to any one of the following sections to open the case to which you want to add a child task.
   - My work overview
   - My work
   - Group work
   - Unassigned work
3. Select the case.
   The case details page of the selected case opens separately.
4. Select the  icon on the top right of the header.
5. Select **Create task**.
6. On the form, fill in the fields.
   On the form, the **Parent case** field is automatically set with the case number of the case to which you are adding this child task.

> **Note:** You can also create a task by quick action without connecting to any parent case from the **Work view** page in the Workplace Agent for mobile application.

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Create task form

Field	Description
Workplace task type	Set the type of task
Short description	Enter a short description about the task.
Description	Enter a detailed description about the task.
Workplace location	Select the location for which you're creating the task.
Workplace service item	Select the workplace item if the task is associated with a workplace service item.
Product model	Select the product model.
Asset	Select the asset type.
Priority	Set the priority of the task.
State	Set the state of the task.
Expected start	Enter the expected start date.
Due date	Enter the due date.
Cost	Enter the cost for the task.
Vendor	Select the suitable vendor.
Assignment group	Select the assignment group to which the task belongs.
Assigned to	Select the user agent to whom you want to assign the task.
State	Set the state of the task.
Parent case	Task is created for the parent case
Sign template	Select a signing template.
Add attachment	Add attachment related to the task.

7. Select **Submit**.

Result
The child task is created. After creation, the child task details are displayed in a separate page. For more information about actions that you can perform on a task, refer to Edit or view a child task.

Create a workplace case on behalf of an employee through Workplace Agent for mobile

Create workplace cases on behalf of an employee in the Workplace Agent for mobile work view page.

Before you begin
Verify that you have installed the required plugins.

Role required: sn_wsd_case.workplace_agent

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Procedure

1. Log in to Workplace Agent for mobile application.
2. On the **Work view** page, click the quick action option on the top corner of the header.
3. Tap **Create a case**.
4. On the **Create a case** page, select any option.
5. On the form, fill in all the required details.
6. Tap **Submit**.

Edit or view a child task

View or update a task whenever you want to get the details or update the progress.

Before you begin

Verify that you have installed the required plugins.

Refer to Workplace Agent for mobile - Key features, actions, and case details for detailed information of all the actions available.

Role required: sn_wsd_case.workplace_agent

Procedure

1. Log in to Agent Workplace Service for Mobile application.
   The launch screen opens with your **Work view**.
2. On the **Work view** page, go to any one of the following sections to view the cases and tasks.
   - My work overview
   - My work
   - Group work
   - Unassigned work
3. **Optional:** If you know the parent case of the task, select the case.
   The case details page opens separately.
4. Select the task.
   The task details page opens separately.
5. To go to the location specified in the task, select the Location icon ( ).
   The map opens. Select **Get directions** to know the directions.
6. To edit the task details, do the following:
   a. Select **Edit**.
   b. On the Edit task form, change the fields that you want to edit.
   c. Select **Submit**.
      The task details are updated.
7. To view the activities performed on the task, and to add any notes or attachments, do the following:
   a. Select the **Activity** tab.
   b. To add a comment, select **Add Comment**.

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c. To attach a file, select .

d. To attach photos, select .

e. To take a photo or video, select .

8. To perform other actions, select the icon on the top-right of the header and do the following:

a. To update the checklist of the task, select **Update checklist**.
On the Checklist page, select the checklist items that you want to add.

b. To update the current state of the task, select **Update state**.

i. On the Update state form, select the state to which you want to update the task.

ii. Select **Submit**.
The state is updated.

c. To add a comment, select **Add comment**.
You can also add a comment directly from the details page using the **Comment** option.

i. Enter your work notes in the **Work notes** field.

ii. To add additional comments, enter the comments in the **Additional comments (Customer visible)**.

iii. Select **Post**.
The comments are posted.

d. To view, add, or edit the attachments, select **View attachments**.

i. On the Attachment page, view the list of attachments.

ii. To edit an attachment, select the icon.

iii. To delete an attachment, select the icon.

iv. To preview an image, select the image directly.

9. To save the task for quick reference, select the icon.
The task is saved in the **Saved** tab. You can view the task at any time from this tab directly.

Offline mode

You can switch to an offline mode and work on your workplace cases in the ServiceNow Agent application. When you work on an offline mode, you can perform any action without an internet connection. Once you turn on to the online mode, the changes are all synchronized automatically. If there are any conflicts, you can resolve them in your outbox.

Before you begin

Role required: sn_wsd_case.workplace_agent

To turn on offline mode, perform the following steps:

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Procedure

1. Navigate to **Settings**.
2. Select **Download Cache**.
3. Enable the **Offline Mode** option.

Workplace Agent for mobile - references

Learn more about the key features of Workplace Agent for mobile application.

Workplace Agent for mobile - Key features, actions, and case details

The Workplace Agent for mobile lets you manage your workplace cases, maintenance cases, move cases and, tasks associated with them on the go using your mobile device.

Workplace Agent for mobile - Capabilities

The Workplace Agent for mobile is designed for a workplace agent to handle any cases raised from the Workplace Service Delivery applications at any time. The application mainly intends to save time by letting you view or work on a case from anywhere using just a mobile device. As an agent, you can view, edit, update, and resolve a case based on the progress.

When you log in to the application as an agent, the application displays all the workplace cases that are associated with you. You can get details such as the number of cases that are assigned to you, the details of the cases that are assigned to you, the cases that are assigned to your assignment group, and also the unassigned cases that belong to the agent assignment group.

When you log in as an agent, you can use a quick action to create a case or task without having to connect to a parent case. Use the search icon  from the top-right corner to search for cases, tasks, articles, services and people from the Work view page. The AI search provides results from **Workplace case**, **Workplace task**, **Knowledge** articles within the workplace service or users.

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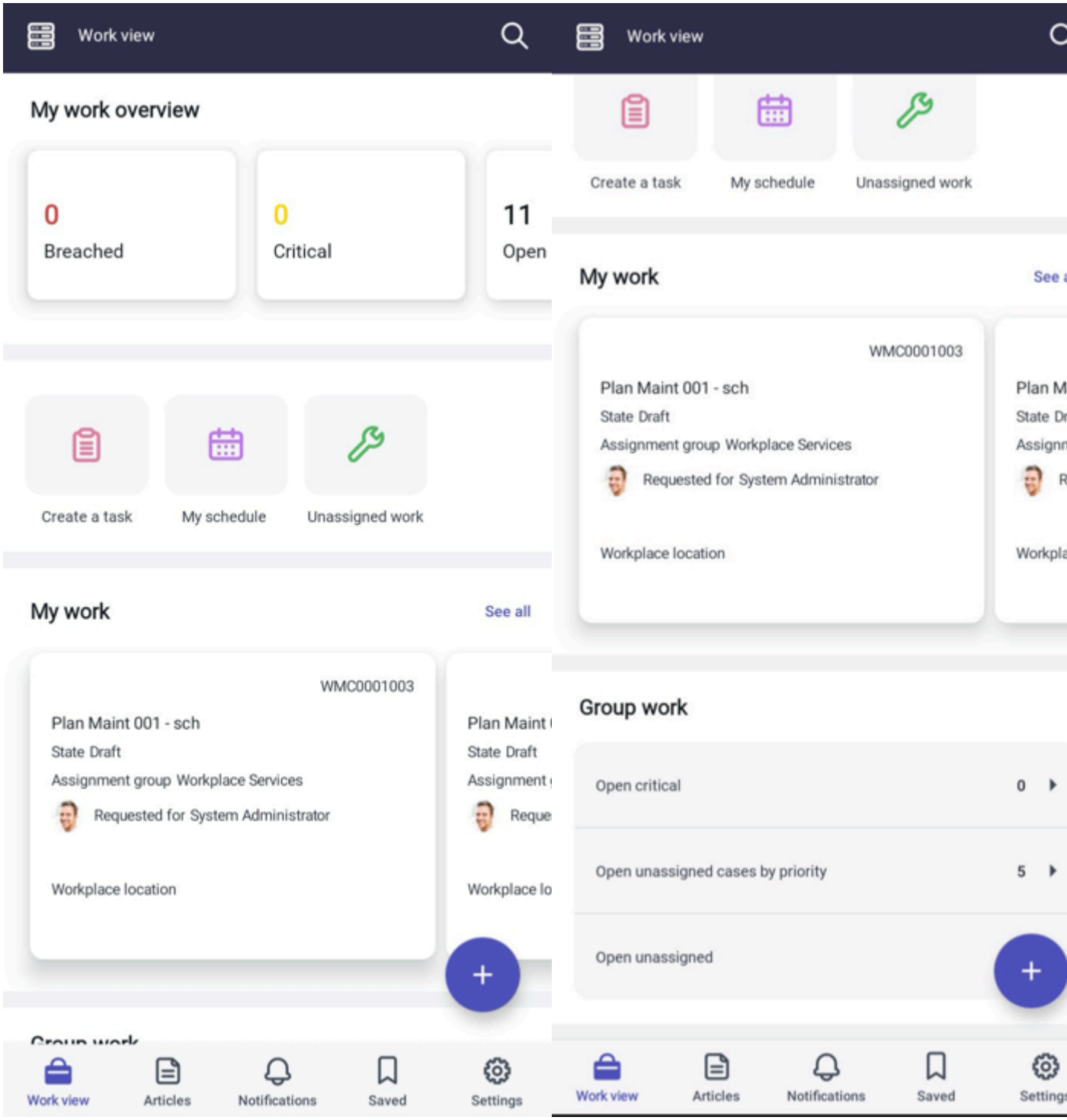

Note: All the screens captured are from the Workplace Agent for mobile application on an Android device.

The launch screen of the Workplace Agent for mobile application enables you to switch between the following tabs:

- **Work view**: The launch screen displays the **Work view** page by default. The Work view screen displays all your workplace case-related information categorized under various sections. Refer to the **Workplace Agent for Mobile - Work view** topic below.
- **Articles**: The **Articles** tab displays the knowledge base articles created by your organization. The search option uses AI and is used to search for the articles within the workplace service.

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- **Notifications**: The **Notifications** tab displays notifications of the cases that have breached SLAs and more.
- **Saved**: The **Saved** tab displays any cases or tasks that you have saved for a quick view or for any other reason.
- **Settings**: The **Settings** page enables you to make settings related to your profile and more. You can also switch to an offline mode. When you work on an offline mode, you can perform any action without an internet connection. Once you turn on to the online mode, the changes are all synchronized automatically. If there are any conflicts, you can resolve them in your outbox.

Workplace Agent for mobile - Work view

The **Work view** is the default page that is displayed when you launch the application. **Work view** is the main page of the application from where you can view all your workplace cases and tasks. The view is categorized under various sections where the cases assigned to you and the cases assigned to your assignment group are divided for easy tracking. The page displays the following sections:

My work overview

The **My work overview** section displays a report of the cases and tasks that are assigned to the logged in workplace agent under various statuses.

The following reports are displayed as cards:

- **Breached**: Displays the number of workplace cases that have breached the SLAs.
- **Critical**: Displays the number of critical cases that are assigned to you and awaiting to be resolved.
- **Open**: Displays the number of cases that are currently open and in progress.
- **Resolved**: Displays the number of cases that you have resolved.
- **All**: Displays all the open cases, tasks and reports.

You can select a report card to get more details of the cases/tasks. You can view details such as the type of workplace case, the priority of the case, the case number, the current state of the case, the assignment group associated with the case, the employee for whom the case was requested and the location for which the workplace case is requested along with the location pin to view it on the floor map. You can also select the case details card for further details such as the child cases, child tasks associated with the case and to edit or perform any action. For more information about the case details and actions that you can perform on a case/task, scroll down to the **Workplace case details - Overview and actions** topic below.

The **Work view** page displays a section of quick links for performing actions.

- **Create a task**: Agents can create a task without connecting to any parent cases.
- **My schedule**: Displays only those cases and tasks which have expected start and due date available in a calendar view. You can also create a task from the My schedule page associating with a parent case.

  Save: The **Save** option () saves the case so you can view it easily in a single window. You can view the saved cases in the **Saved** tab at the bottom of the screen.

  To return to the current date on the calendar view, select the  icon.

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- **Unassigned work**: Displays all the unassigned cases and tasks of one or more assignment groups to which you belong. The unassigned cases and tasks are assigned to the assignment group but aren't assigned to any workplace agent.

  Cases and tasks appear in a list segmented under their respective tabs. They can also be filtered using case and task filters.

My work

The **My work** section displays the details of the cases/tasks that you're handling. The cases are displayed as cards with details such as the type of workplace case, the priority of the case, the case number, the current state of the case, the assignment group associated with the case, the user for whom the case was requested and the location for which the case is requested along with the location pin to view it on the floor map.

You can swipe the list to the right to view more cases and also select **See all** to view a complete list of all the cases in a separate screen.

Group work

The **Group work** section enables you to view the workplace cases assigned to you and your assignment group under the following categories:

- **Open Critical**: Displays a list of critical cases.
- **Open unassigned cases by priority**: Displays a list of cases that are associated with your assignment group but is unassigned to anyone. The cases are displayed by priority
- **Open unassigned**: Displays a list of cases and tasks that are unassigned.

At any time, you can select the case details to view more details of the case or task in a separate screen.

Workplace case details - Overview and actions

The application enables you to view complete details of a workplace case, maintenance case, move case, space configuration case, and tasks associated with the case. The case details view provides you with a similar view as that of what you see when you open the case in a native view on a desktop/laptop.

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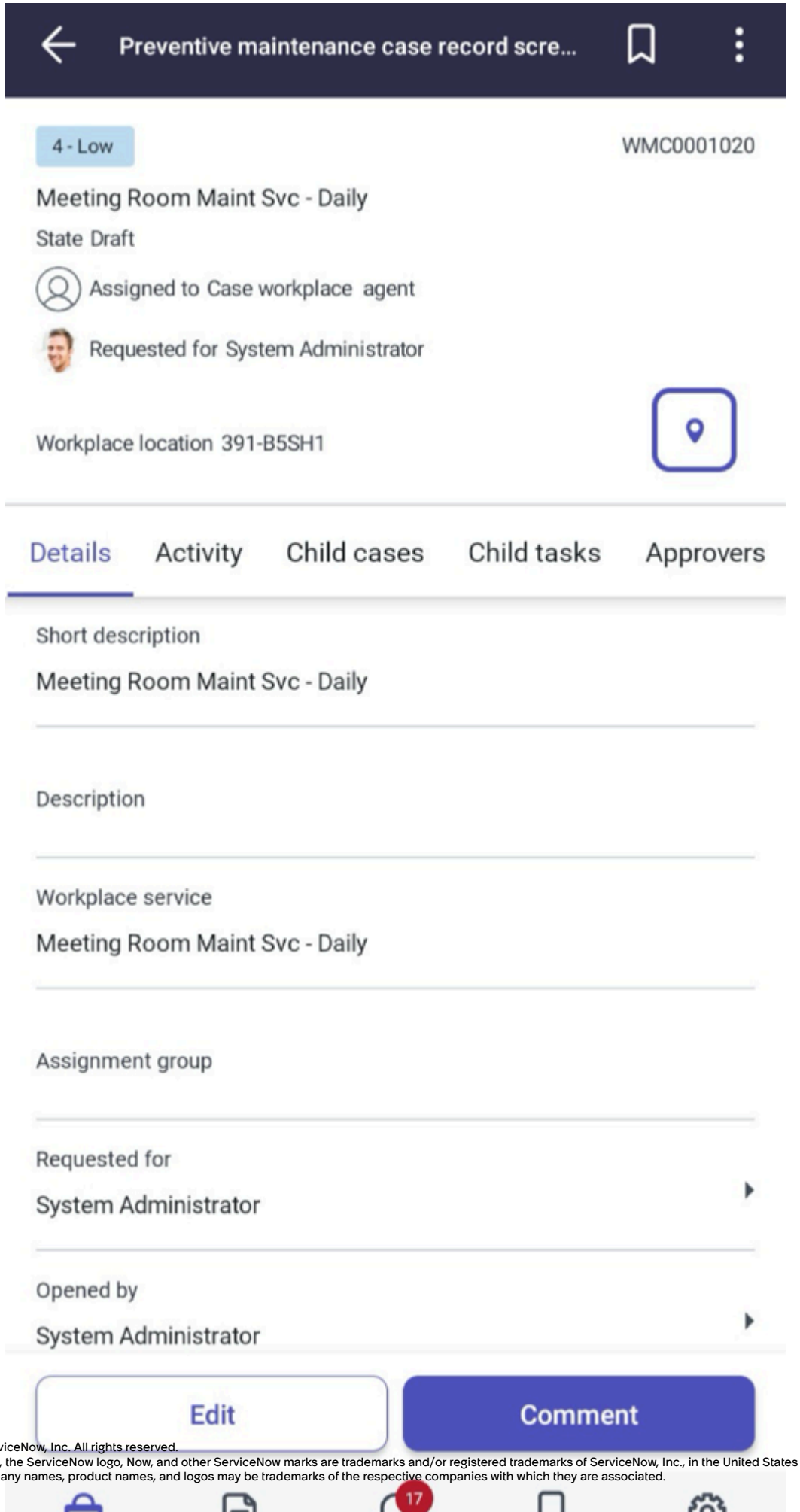

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The application's launch screen, as a workplace agent, you can work on any case based on its priority, assignment status, current state and more. The **Work view** displays cases based on various categories to make it easier for you to start working.

There are various case details screens depending on the type of workplace case that you're opening such as:

- Workplace case
- Workplace reservation case
- Move case
- Preventive maintenance case
- Corrective maintenance case

For example, when you open a regular workplace case, the details of the case are displayed in a separate **Workplace case details** screen.

The case details screen for all types of cases displays complete details of the case along with the related lists.

The default view of the case details provides the following options:

- **Location pin**: Select the Location pin ( ) to view the location pin of the workplace location on the floor map above the related lists.
- **Save**: The **Save** option ( ) enables you to save the case in case you want to view it easily in a single window. You can view the saved cases in the **Saved** tab at the bottom of the screen.
- **Related lists**: The following related lists are displayed:

  Details

  Displays the details of the case such as the description, the workplace service using which the case is requested, the employee for whom the case is requested, the user who opened the case, the workplace location for which the case is created, the date when the case was requested and other details like expected start time and due date.

  - If you're viewing a move case, you can view the details such as the **From location**, **To location**, **Reason** for move, **Requested move date** and the **Due date** by when the move must be performed.
  - If you're viewing a maintenance case, you can view the details such as the **Product model** of an asset and **Enterprise asset**.

  Variables

  Displays the variables entered on the form when the case was requested by the requester.

  Activity

  Displays the various activities performed on the workplace case since its creation.

  Child Cases

  Displays the child cases created for this case.

  Child tasks

  Displays the child tasks created to fulfill the case. You can select the child task to view the task details in a separate page. For more information about viewing task details and more, refer to the **Workplace task details - Overview and actions** topic below.

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Approvers

Displays the approvers related to the case.

Case SLAs

Displays the SLAs associated with the case. If any child case or task breaches an SLA, the case card is displayed with a **Breached** tag.

Attached knowledge

Displays any knowledge articles associated with the case. You can select the link to navigate to the knowledge base article on a separate page.

Related cases

Displays cases related to this workplace if there are any. In case of a preventive case or a corrective maintenance case, the **Related cases** related list is displayed as **Workplace cases**.

Case conflict review

The related list appears only for the move case. Displays the conflicts.

Requested service items

Displays the service items that are requested along with the case.

Fulfillment instructions

Displays the fulfillment instruction to fulfill the workplace case. You can select the link to navigate to the knowledge base article containing the fulfillment instruction on a separate page.

When you open a move case, the following related lists are displayed:

The case details page provides you with the following action options:

Edit case

The **Edit case** option enables to edit a case at any time.

Comment

The **Comment** option enables you to add comments to a workplace whenever you want to add more information or make an update about the progress. You can add work notes to notify other agents and additional comments to inform the requester.

Assign to me

The **Assign to me** option enables you to assign the case to yourself if the case is unassigned and if the case belongs to the assignment group to which you belong. The option is displayed only if the case is unassigned.

Select the action menu ( ) on the top-right header of the case details page to view further actions listed below:

Add comments

The option enables you to post comments to the case. It's the same as the **Comment** action on the page. You can add work notes to notify other agents and additional comments to inform the requester.

Assign case

The option enables you to assign the case to another workplace agent. The option is displayed only if the task is unassigned.

Create task

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The option enables you to create a child task and a parent case is already associated.

Attach knowledge

The option enables you to add any knowledge base articles to the workplace case whenever required. You can search from a list of available knowledge base articles. You can add multiple articles to a case.

Update checklist

The option enables you to update any checklist items if necessary.

Update state

The option enables you to update the current state of the case.

View attachments

The option enables you to view all the attachments of the case at a single place.

Workplace task details - Overview and actions

The application enables you to close tasks at any time. You can open a task from your **Work view** or by opening the case to which it's associated with.

The workplace task details card displays information such as the task number, the priority of the task, the task name, the current state of the task, the assignment group to which the task is assigned, the workplace location for which the task is created and the location pin of the workplace location to view it on the floor map.

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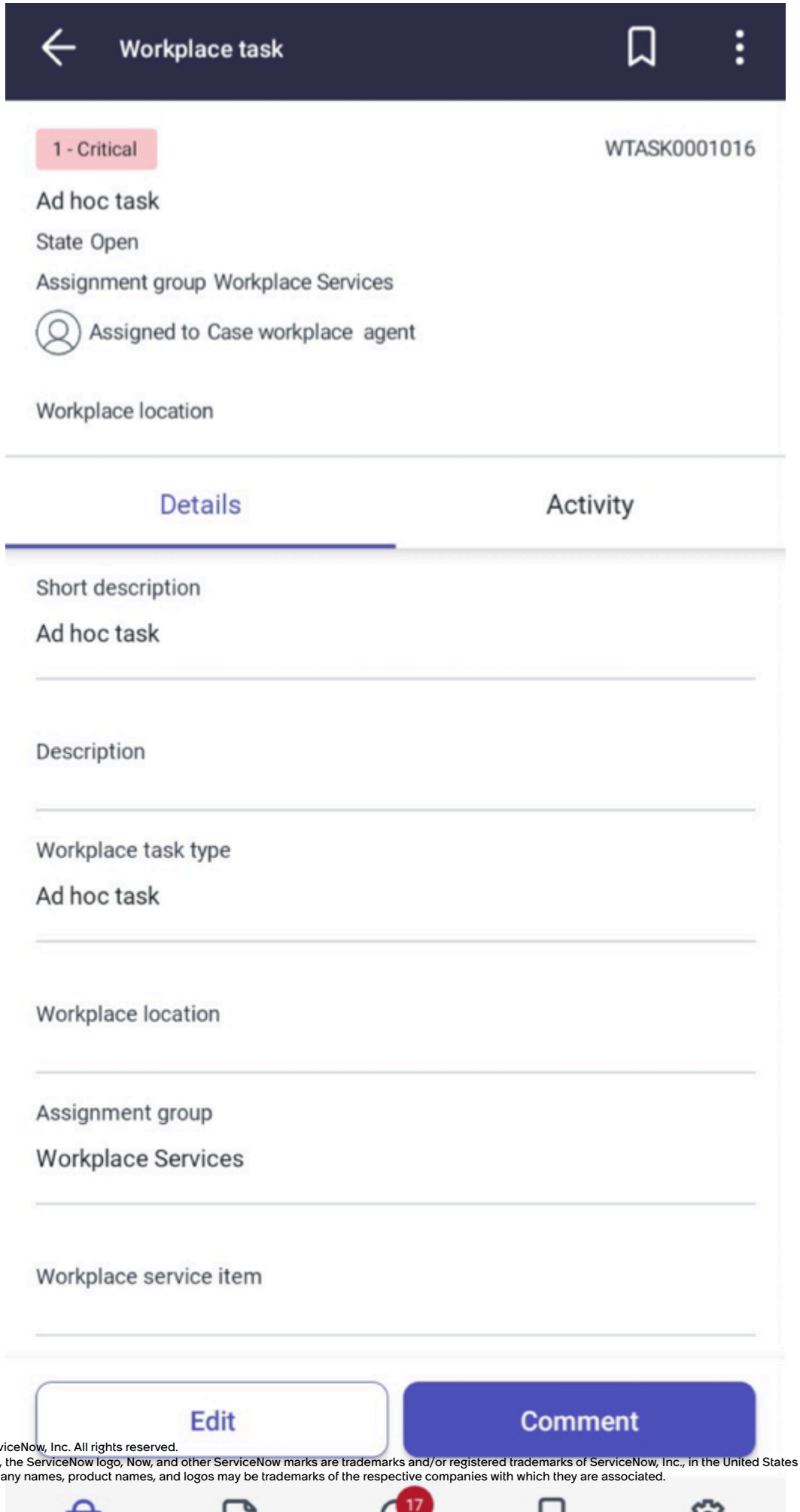

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When you select the workplace task details card, the task details open in a separate screen. The task details display the details of the task and the activities performed on the task.

On the task details page, you can use the following options:

- **Location pin**: Select the Location pin ( ) to view the location pin of the workplace location associated with the task on the floor map
- **Save**: The **Save** option ( ) enables you to save the case in case you want to view it easily in a single window. You can view the saved cases in the **Saved** tab at the bottom of the screen.

The task details default view displays the following information:

Details

Displays the task details such as the descriptions, the task type, the location for which the task is created, the assignment group, the workplace service item that is included in the task, the vendor, the sign template, the details of the user who opened the task and when the task was opened, and more. You can also view the parent case details of the task. The expected start time and due date details are also displayed.

Activity

Displays the details of all the activities performed on the task. You can also add a comment if necessary and add attachments. You can add attachments like files, images, and even capture a photo or a video with the camera.

You can perform the following actions on a task from the detail page:

Edit

The option enables you to the edit the task details at any time.

Comment

The option enables you to post comments on the task. You can post work notes and also additional comments.

For more actions, select the action menu on the top-right header of the task details page. The following actions are displayed:

Assign task

The option enables you to assign the task to an agent if necessary. The option is displayed only if the task is unassigned.

Add comment

The option enables you to add comments to the case. You can add work notes to notify other agents and additional comments to inform the requester.

Update checklist

The option enables you to update any checklist items if necessary.

Update state

The option enables you to update the current state of the task based on your progress.

View attachments

The option enables you to view all the attachments of the task at a single place.

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WSD for Microsoft places

Manage all your workplace service requests from the WSD for Microsoft places application integrated with Microsoft Teams.

Get started

Explore	Configure	References
Learn about WSD for Microsoft places	Install WSD for Microsoft places to get started	Know about the key features of Know about the key features of WSD for Microsoft places

Explore WSD for Microsoft places

Manage and create all your workplace service requests from the WSD for Microsoft places application integrated with Microsoft Teams.

The WSD for Microsoft places application integrated with the Microsoft Teams enables you to create and manage open workplace service requests. You can manage and create workplace service requests from **Equipment**, **Reservation services**, and **Site services** tabs.

As a workplace user, the application enables you to perform the following actions:

- You can view all the open requests.
- You can create service requests.
- The application displays the following workplace service topics:
  - **Equipment**
  - **Reservation**
  - **Site services**
- You can create an **Equipment** and **Request furniture** service requests from **Equipment**.
- You can create a **Catering** service request from **Reservation services**.
- You can create service requests like **Badge request**, **Heating & Cooling**, **Tech support**, and **Cleaning** requests from **Site services**.

For more information about raising service requests, refer to Requesting a workplace service.

Related topics

WSD for Microsoft places- Key features and actions

Configure WSD for Microsoft places

Install and integrate the WSD for Microsoft places application with Microsoft Teams.

To register and integrate the WSD for Microsoft places application with Microsoft Teams, perform the following procedures in an order:

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- Register the **WSD for MS Places** application Register the WSD for Microsoft places application
- Download Manifest files Download manifest files
- Modify the Manifest file (.json) Modify the manifest file
- Upload the application Upload the WSD for Microsoft places application

Related topics

WSD for Microsoft places- Key features and actions

Register the WSD for Microsoft places application

Register the WSD for Microsoft places application in the Microsoft Azure portal.

Before you begin

Role required: admin

Procedure

1. Log in to Microsoft Azure portal.
2. Click **App registrations**.
3. Click **+ New registration**.
4. Enter the **Display name**.
   Application (client) ID, **Directory (tenant) ID**, **Object ID**, and **Application ID URL** are auto-generated.
5. Go to **API permissions**.
6. Under **Configured permissions**, add the following permissions and provide **Grand admin consent for ServiceNow**.
   - Calendars_ReadWrite
   - email
   - offline_access
   - openid
   - profile
   - User_Read
7. Go to **Expose an API**.
8. You can add clients like selecting **+Add a client application**.
9. Go to **Authentication**.
10. Add the **Web Redirect URLs**.

What to do next

Follow up with downloading the manifest files.

Download manifest files

Download the manifest files as part of configuring and integrating WSD for Microsoft places application in Microsoft Teams.

Before you begin

Role required: admin

Ensure to register the WSD for Microsoft places application in the Microsoft Azure portal.

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For more information about registering the WSD for Microsoft places application, refer to Register the WSD for Microsoft places application

Procedure

1. Navigate to **Teams** > **ServiceNow for Teams**.
2. Click **New** to create a registry.
3. All the fields are generated, enter a **Short name** and **Full name** according to your requirements.
4. Click **Submit**.
5. Click **Next**.
6. Under the **Configure Virtual agent** tab, select the first option **Configure a ServiceNow instance to your Microsoft Teams tenant**.
7. Click **Next**.
8. Enter the **Application ID** and **Directory (client) ID**.
9. Enter the **Tab name** and click **Next**.
   Application Registry record is created.
10. Click **Download Manifest**.

What to do next

Follow up with modifying the .json file from the manifest zip file.

Modify the manifest file

Modify the manifest file as part of WSD for Microsoft places application in Microsoft Teams.

Before you begin

Role required: admin

Ensure to download the manifest file.

For more information on downloading the manifest files, refer to Download manifest files

Procedure

1. Unzip the manifest file.
2. Open the .json file
3. Follow the instructions to modify:
   a. Search for **id** in the .json file and replace it with the **Application (client) ID**.
   b. Look for **bots**,**Composeextensions**, and **activities** and remove them.

   Note: If the users want to open multiple portals, then the second part of the content url **sn_now_teams_ms_login.do** should be replaced with **n_ms_teams_wsd_ms_login.do**.
4. Navigate to **System properties**> **sn_now_teams.portal.suffix**.
5. Enter **wsp** in the value field.
6. Save the .json file and zip all the files.

What to do next

Follow up with upload the application process to complete the integration of WSD for Microsoft places application with Microsoft Teams.

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Upload the WSD for Microsoft places application

Upload the WSD for Microsoft places application in Microsoft Teams.

Before you begin
Role required: admin

Ensure to modify the manifest file (.json file)

For more information about modifying the manifest file, refer to Modify the manifest file

Procedure

1. Log in to Microsoft Teams with the email address.
2. Select **+ Apps**.
3. Select **Manage your apps**.
4. Under **apps**, click **Upload an app**.
5. Select **Upload a customised app**, browse for the updated zip file, and upload.
6. Click **Add** to integrate WSD for Microsoft places application in Microsoft Teams.

Result
The WSD for Microsoft places application is integrated with Microsoft Teams.

WSD for Microsoft places -references

Learn more about the key features of WSD for Microsoft places application.

WSD for Microsoft places- Key features and actions

The WSD for Microsoft places application lets you create workplace service requests and manage all your open workplace service requests.

WSD for Microsoft places- Key features

The WSD for Microsoft places is designed for a workplace user to create and manage workplace services requests. As an agent, you can create, and view service requests, and monitor its progress.

When you log in to the WSD for Microsoft places application as an agent, the application displays all the Workplace services requests under Workplace service topics. You can get details such as the number of open requests. You can also add service requests as favorites to view under **My Favorites**.

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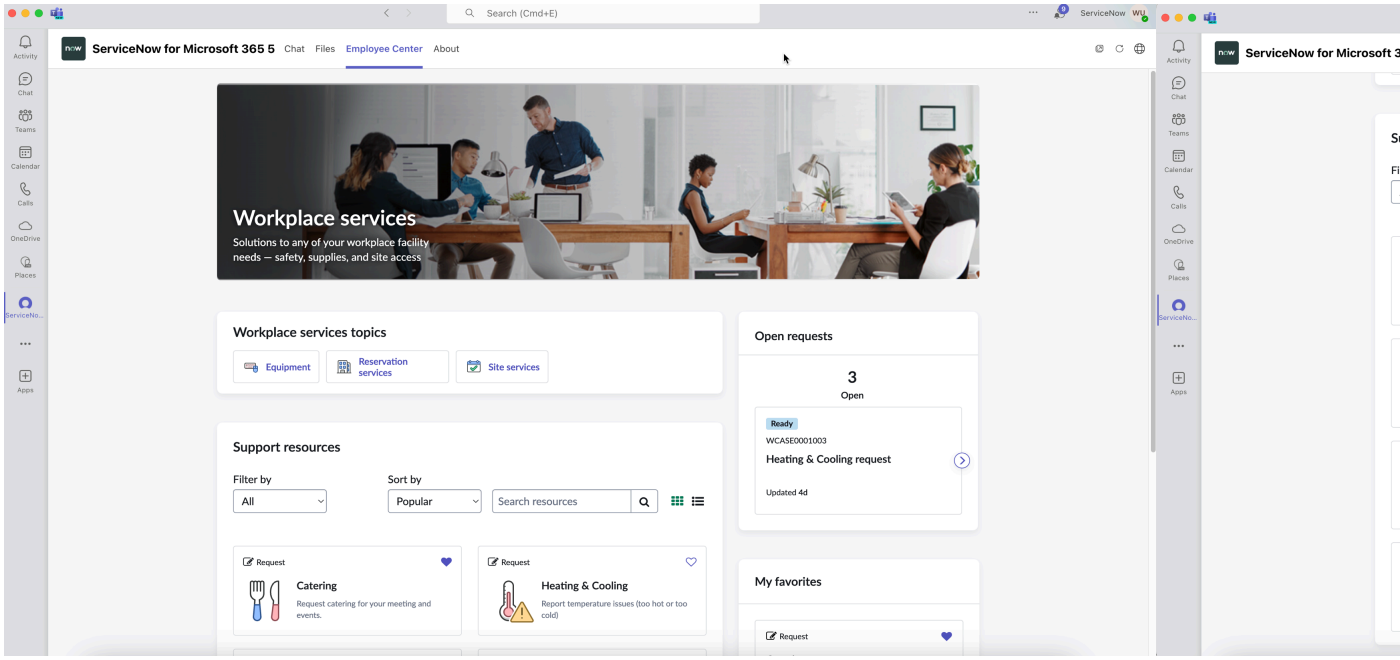

The launch screen of the WSD for Microsoft places application displays **Workplace services topics**, **Support resources**,**Open requests**, and **My Favorites**.

The workplace service requests under **Support resources** appear in a **Card view** by default. The view can be changed to **List view**. These requests can be sort by popular and alphabetical, and filter by articles and requests.

WSD for Microsoft places- Workplace service topics

The **Workplace service topics** is the default page that is displayed when you launch the application. **Workplace service topics** categorizes all types of workplace service requests.

- **Equipment**: The launch screen displays the **Equipment** tab by default. The **Equipment** tab displays categorized workplace services requests **Equipment** and **Requested furniture**.
- **Reservation services**: The launch screen displays the **Reservation services** tab by default. The Reservation services tab displays categorized workplace services requests **Catering** and **Tech support**.
- **Site services**: The launch screen displays the **Site services** tab by default. The Site services tab displays categorized workplace services requests **Heating & Cooling**, **Badge request**, and **Cleaning**.

WSD for Microsoft places- Support resources

The **Workplace service topics** is the default page that is displayed when you launch the application. **Workplace service topics** is the main page of the

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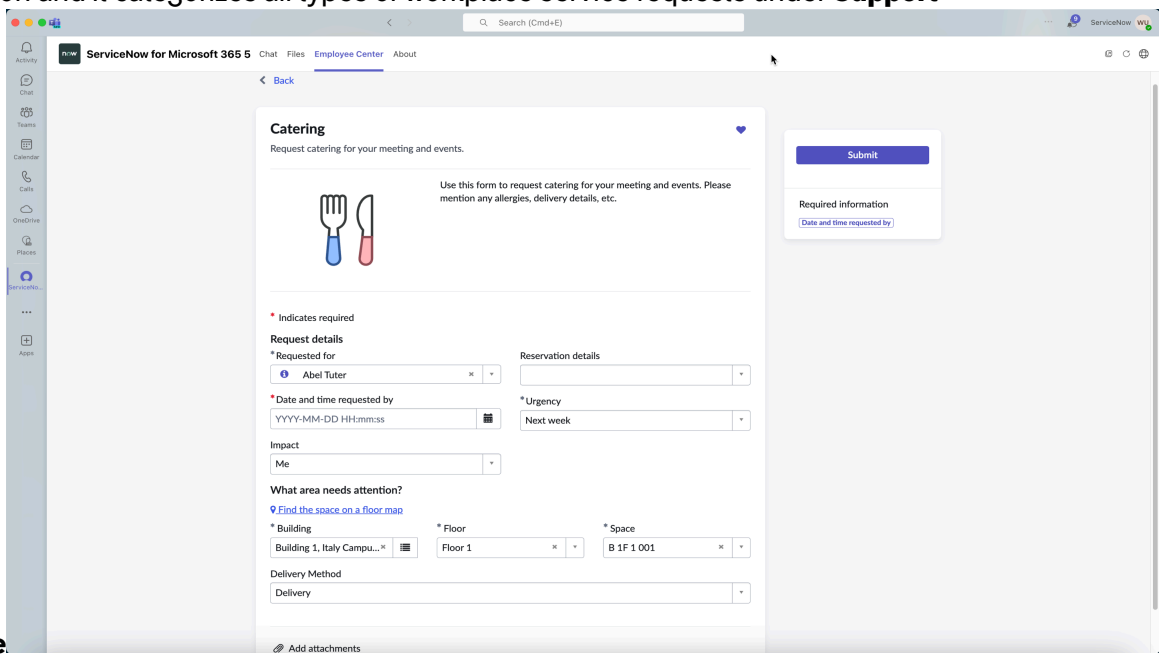
application and it categorizes all types of workplace service requests under **Support resource**.



- **Catering**: The launch screen displays the **Catering** request by default. You can Submit a catering request for your meetings and events.
- **Heating & Cooling**: The launch screen displays the **Heating & Cooling** request by default. You can submit a request to report temperature issues (too hot or too cold).
- **Requested furniture**: The launch screen displays the **Requested furniture** request by default. You can submit a request for furniture or equipment for workplace spaces.
- **Badge request**: The launch screen displays the **Badge request** by default. You can submit a request for a new hire badge, badge photo, lost badge, replacement badge, or access issue.
- **Tech support**: The launch screen displays the **Tech support** by default. You can submit a request for tech assistance for projectors, video conferencing, and so on, for your meetings.
- **Cleaning**: The launch screen displays the **Cleaning** request by default. You can submit a request for reporting a spill and sanitation issue.
- **Equipment**: The launch screen displays the **Equipment** request by default. You can submit a request for additional chairs, tables, or whiteboards for your workplace spaces.

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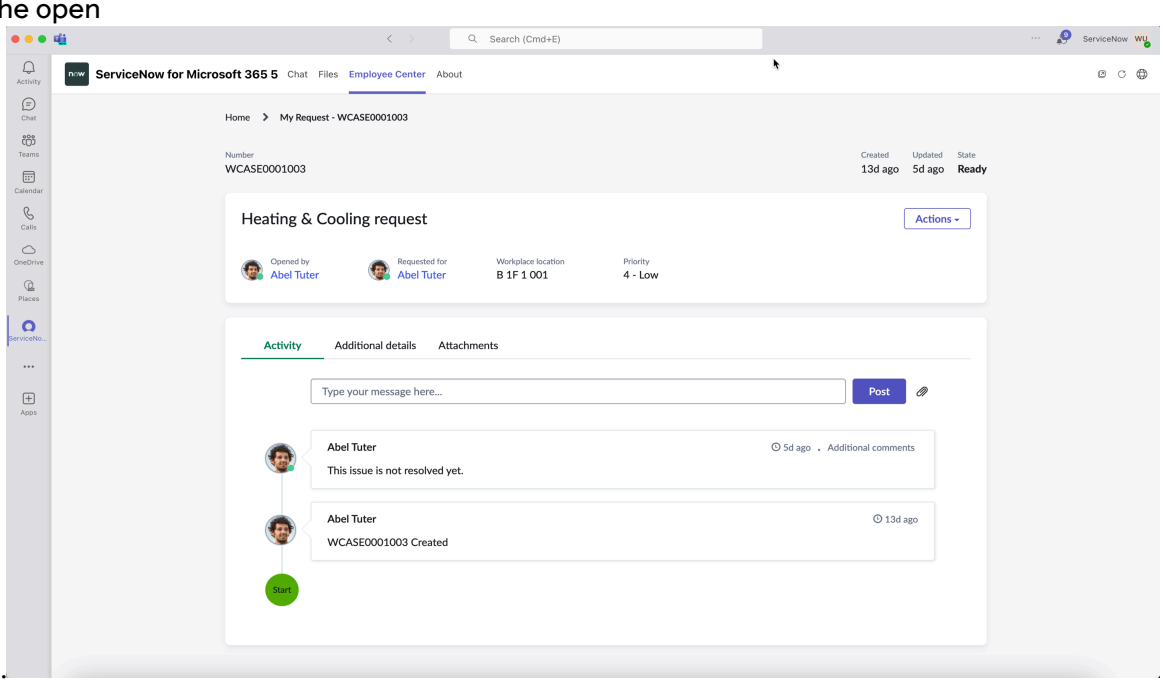
WSD for Microsoft places- Open requests and My favorites

Open requests is the default widget that is displayed when you launch the application. You can view all the open



requests.

My Favorites is the default widget that is displayed when you launch the application. You can add any service requests to the favorites and then those requests appear under the **My Favorites** tab.

Workplace Services Kiosk

Workplace Services Kiosk provides a seamless check-in experience for visitors.

Get started

Explore	Configure
Learn more about providing a seamless check-in experience for visitors.	Plan and configure your Workplace Services Kiosk installation.

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Integrate	Manage
 Integrate Workplace Services Kiosk with other features.	 Assign, change, or remove a kiosk configuration form kiosk devices.
Use	**Reference**
 Check-in or self-register as a visitor.	 Information about lists and forms used to configure Workplace Services Kiosk.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Explore Workplace Services Kiosk

Learn more about Workplace Services Kiosk to provide efficient check-in, check-out, and self-registration experience for visitors and employees.

Workplace Services Kiosk overview

Customize Workplace Services Kiosk to suit the needs of employees and visitors. Visitors can autonomously check in, check out, self-register, and make workplace reservations on the kiosk map. Efficient visitor check-in process reduces wait times and long queues during busy or peak hours. Visitors can use invitation sent by employees. They can check in or check out using a pass code, name, email, or phone number. Employees can use the Workplace Visitor Management feature to send invites to visitors and receive notification when a visitor checks-in using the kiosk. Workplace Services Kiosk offers following capabilities:

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Workplace Services Kiosk users

Users

User	Description
Kiosk Administrator	Kiosk administrators can configure kiosk devices, create kiosk pages. As an admin, you can link the kiosk pages to a configuration.
Kiosk Operator	Kiosk Operators can set up or bind a physical device by linking it to kiosk device configurations.
Visitor	Visitors can check in, check out, or self-register by using a kiosk device.
Employee (Host)	Employees can send invites to visitors using the Workplace Visitor Management feature. Employees can choose to be notified through email or Virtual Agent when the visitor checks in.

Workplace Services Kiosk benefits

Workplace Services Kiosk benefits

Benefit	Feature	Users
Create kiosks, configure welcome pages, add modules to the kiosk, and add a Reservable Module configuration for a kiosk to make reservations.	• Create a kiosk configuration • Create a kiosk homepage • Configure Reservable Module for kiosk reservation	Kiosk Administrators
Create modules for the check-in and self-registration flow or the check-out flow.	Create a kiosk module	Kiosk Administrators
Assign a kiosk configuration to a device to retrieve the configuration. Bind a kiosk to a physical device for visitors and guests to make workplace reservations .	• Select a kiosk for a device • Select a kiosk for a device	Kiosk Operators
Check in autonomously to avoid waiting in a queue	Check in using an invite	Visitors
Make workplace reservations on Kiosk Map.	Make workplace reservations on the kiosk	Kiosk viewers (guests and visitors)

What to explore next

To learn more about configuring and using Workplace Services Kiosk, see:

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- Configuring Workplace Services Kiosk
- Managing Workplace Services Kiosk
- Using Workplace Services Kiosk
- Workplace Services Kiosk reference

Configuring Workplace Services Kiosk

Plan and configure your Workplace Services Kiosk installation.

Configuration overview

Note:

- The kiosk device automatically maintains the session before it times out. The session timeout value can be configured in the *glide.ui.session_timeout* property.
- The kiosk header contains the session refresh API; ensure that you do not remove or replace the kiosk theme or the kiosk header.

  For information about customizing the kiosk header, see Customize the kiosk header.

Install Workplace Services Kiosk

Install the Workplace Services Kiosk application from the ServiceNow Store. Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Before you begin

Complete the following setup instructions:

1. Navigate to **Subscription Management** > **Subscriptions** in your instance.

   The list displays the subscriptions that your organization has purchased.
2. Verify that the Workplace Core plugin is activated.

Use the following details when required:

- Name of the application: Workplace Services Kiosk
- ID of the application: sn_wsd_kiosk

Role required: admin

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Find the application by using the filter criteria and search bar.
   Search for the application by its name (Workplace Services Kiosk or ID (sn_wsd_kiosk). If you can't find the application, you may have to request it from the ServiceNow Store.
3. Select **Install**.
4. In the Application installation dialog box, review the application dependencies.
   A list of dependent plugins and applications are displayed if they'll be installed, are currently installed, or must be installed. If there are any plugins or applications that must be installed, you must install them before you can install Workplace Services Kiosk.
5. **Optional:** If demo data is available and you want to install it, select **Load demo data**.

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(Optional) Demo data comprises sample records that describe application features for common use cases. Load demo data when you first install the application on a development or test instance.

Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Create a kiosk configuration

Create a kiosk configuration, assign a homepage, and link a kiosk device module.

Before you begin

Note:

- The kiosk device automatically maintains the session before it times out. The session timeout value can be configured in the *glide.ui.session_timeout* property.
- The kiosk header contains the session refresh API; ensure that you do not remove or replace the kiosk theme or the kiosk header.

  For information about customizing the kiosk header, see Customize the kiosk header.

Role required: sn_wsd_kiosk.admin

Procedure

1. Navigate to **All** > **Kiosk management** > **All Kiosks**.
   For Workplace Services Kiosk version 1.1.0 or earlier, navigate to **All** > **Kiosk management** > **Kiosk configurations**.
2. On the Kiosk configurations list, select **New**.
3. On the Kiosk configuration form, fill in the fields.
   For a description of the field values, see Kiosk configuration form.
4. Select **Submit**.
5. On the Kiosk module configurations related list, select **New**.
6. On the form, fill in the fields.

Kiosk module configurations form

Field	Description
Kiosk configuration	Kiosk configuration that the module is linked to.
Module configuration	Configuration record for the kiosk module. For more information about creating a module, see Create a kiosk module. For more information about creating a map configuration, see Configure map features for kiosk.
Active	Status of the kiosk module configuration.

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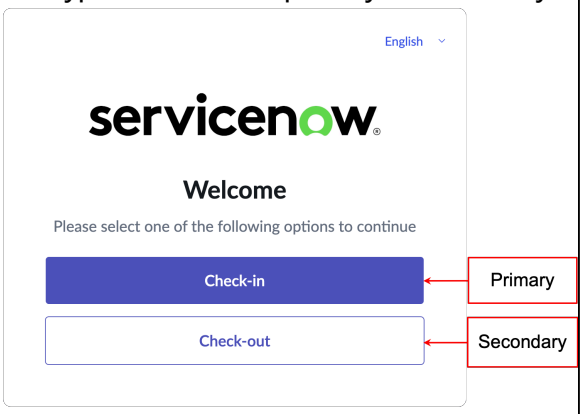
Field	Description
Type	Type of color scheme you want to set for the kiosk module configuration. The type can be set to primary or secondary. 
Order	Order of preference of the kiosk module.

Note:

- The kiosk device automatically maintains the session before it times out. The session timeout value can be configured in the *glide.ui.session_timeout* property.
- The kiosk header contains the session refresh API; ensure that you do not remove or replace the kiosk theme or the kiosk header.

  For information about customizing the kiosk header, see Customize the kiosk header.

7. Select **Submit**.

Result

You have configured a kiosk configuration and linked it to a kiosk module.

Create a kiosk homepage

Create a homepage configuration that is displayed when a user opens the kiosk device.

Before you begin

Note:

- The kiosk device automatically maintains the session before it times out. The session timeout value can be configured in the *glide.ui.session_timeout* property.
- The kiosk header contains the session refresh API; ensure that you do not remove or replace the kiosk theme or the kiosk header.

  For information about customizing the kiosk header, see Customize the kiosk header.

Role required: sn_wsd_kiosk.admin

Procedure

1. Navigate to **All** > **Kiosk management** > **Kiosk homepage**.
2. On the Kiosk homepages list, select **New**.
3. On the form, fill in the fields.

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Kiosk homepage form

Field	Description
Name	Name of the kiosk homepage.
Title	Title that is displayed on the kiosk homepage.
Subtitle	Subtitle that is displayed on the kiosk homepage.
Description	Description of the kiosk homepage.
Logo	Logo image that is displayed on the kiosk homepage.
Background image	Background image that is displayed on the kiosk homepage.

4. Select **Submit**.

Create a kiosk module

Create a kiosk module and module configurations to decide the flow and pages that must be displayed on a kiosk.

Before you begin

Note:

- The kiosk device automatically maintains the session before it times out. The session timeout value can be configured in the *glide.ui.session_timeout* property.
- The kiosk header contains the session refresh API; ensure that you do not remove or replace the kiosk theme or the kiosk header.

  For information about customizing the kiosk header, see Customize the kiosk header.

Role required: sn_wsd_kiosk.admin

Procedure

1. Navigate to **All** > **Kiosk management** > **Kiosk modules**.
2. On the Kiosk modules page, select **New**.
3. On the form, fill in the fields.

Kiosk module form

Field	Description
Name	Name of the kiosk module.
Title	Title of the kiosk module.
Entry point	Page displayed on the home screen of the module. For visitor check in, select *visitor_check_in*. For visitor check out, select *visitor_check_out*.

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Field	Description
	For kiosk indoor mapping, select *kiosk_indoor_map*.

4. Select **Submit**.
5. On the Kiosk module configuration related list, select **New**.
6. On the form, enter a **Name** and **Description** for the record, then fill in the fields.

Module configuration form

Field	Description
Module	Module that the configuration is linked to.
Configuration table	Table that contains the configuration flow for the kiosk. For example, for visitor check in, select the Kiosk Check-in Flow Configuration [sn_wsd_visitor_checkin_flow_configuration] table. For visitor check out, select the Kiosk Check-out Flow Configuration [sn_wsd_visitor_checkout_flow_configuration] table. For a kiosk indoor map, select the Kiosk indoor mapping feature configuration [sn_wsd_indoor_map_feature_configuration] table.
Condition	Condition that selects the configuration flow from the configuration table. The condition must match only one configuration. For example, use the *sys_id* value to ensure only one record matches the condition.
Requires Camera	Option to use the camera of the kiosk device. If this option is selected, the kiosk operator must provide camera permissions on the kiosk device. Visitors can use the camera to scan QR codes or to take their picture. **Note:** If a kiosk flow contains the QR code authentication or requires a visitor picture, this field is automatically enabled when you add the flows to the kiosk.

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7. **Optional:** Add Page parameters by entering the name and value of the parameter.
8. Select **Submit**.

Customize the kiosk header

Customize the kiosk header by editing the CSS code of the Kiosk Header record.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. From the Service Portals list, select the **Kiosk** record.
3. From the **Theme** field, open the **Kiosk Theme** record.
4. From the **Header** field, open the **Kiosk Header** record.
5. In the **CSS** field, customize the code based on your requirement.

   Example
   For example, you can hide the kiosk header by setting the display of the `header-container` class to `none`.

Configure Reservable Module for kiosk reservation

Configure the Reservable Module for Workplace Services Kiosk to enable employees and guests to make reservations. Employees and guests can find available spaces on the kiosk map and make reservations.

Before you begin

Install and configure the following:

- Workplace Reservation Management
- Workplace Services Kiosk
- Workplace Central
- Workplace Indoor Mapping
- Workplace CoreWorkplace Space Management

Role required: admin

Procedure

1. Navigate to **All** > **Workplace Reservation Management** > **Reservable Module**.
   For more information, see Configure a reservable module. On the Reservable Module Configuration page, select the Kiosk module and configure it. This configuration enables employees and guests to select a kiosk on their physical device and make reservations.
2. Complete the following information for creating a kiosk reservation Reservable Module:
   - Name: Name of the Kiosk module.
   - Title: Title of the Kiosk that you want to create.
   - Inline Title: Inline title for the kiosk.
   - Active: Check box option to indicate that Kiosk is active.
   - Image: Add an image for the kiosk.

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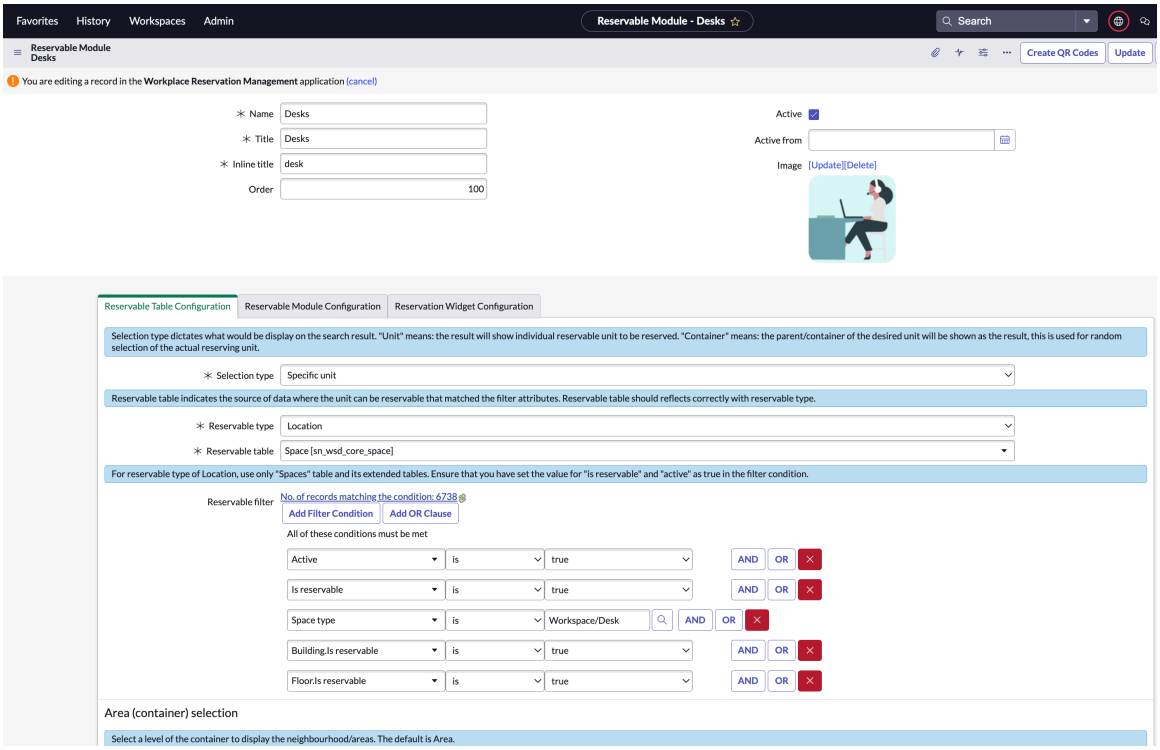
3. Select the Reservable Table Configuration tab.
   On the form, fill in the information.



Reservable Table Configuration

Selection type	Type of selection to display in the search results when employees search. Select one of the following options: ○ **Specific unit**: The search result displays every workplace item. ○ **Container**: The search result displays the parent or container of the workplace items. If you select **Container**, the search results are displayed in groups with a defined quantity available for reservation. Employees can select a container to reserve and any available space from the container is assigned for reservation.
Reservable type	Type of the reservable item. For example, Locations.
Reservable table	Table for the reservable workplace items. **Note:** If you have selected **Location** in **Reservable type**, use only the Space [sn_wsd_core_space] table and its extended tables.
Reservable filter	Filter conditions on the reservable items in the Reservable table. The reservable items

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	are displayed on the application based on the given conditions. Filter conditions on the reservable items in the Reservable table. The reservable items are displayed on the application based on the given conditions. To add a condition, select **Add Filter Condition**. To add an **OR**condition, select **Add "OR"** Clause. ○ To add a condition, select **Add Filter Condition**. ○ To add an OR condition, select **Add "OR" Clause**. **Note:** When applying filter criteria on a location, verify that the **Active** and**Is reservable** check boxes are active and selected for rooms and spaces that are added to a location. Not performing this step adds and displays the inactive or non-reservable spaces and rooms while making a reservation. Add a room using Workplace Space Management and Add a room form.
Area (Container) selection section	Specify the field details.
Reservable container field	Specify the grouping criteria. The field appears only if you selected **Container** as the **Selection type**. The field is automatically set to **Area**. For example, when the field is set to **Area**, the reservation search results appear as groups based on areas.
Reservable quantity field	Reservable quantity for workplace spaces. The **Reservable Quantity** field determines the number of times a container can be booked within a specific reservation time period. This setting provides with flexibility in setting up space reservations without out the need to create individual space records for reservation. For example, if you select **Reservable Quantity**, the container can be reserved as many times as the combined reservable quantity values of all spaces within that container. The reservable quantity depends on the number of spaces provided in the Capacity column of the Workplace Core Space table.

4. Select the **Reservable Module Configuration** tab.

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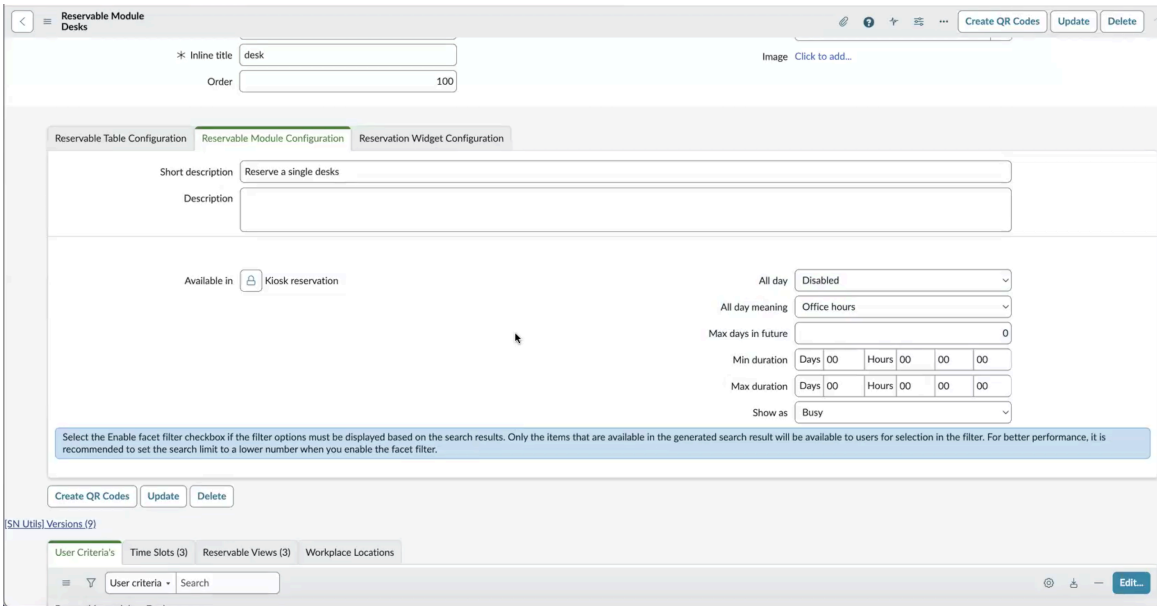

Note: Kiosk Module configuration enables employees to select a kiosk on their device and make workplace reservations. For more information, see Make workplace reservations on the kiosk.

Fill in the field information.

Reservable Module form

Field	Description
Available in	Select **Kiosk reservation**. **Note:** You can't select any other Reservable Module options along with the Kiosk Module. If you select a different Reservable module along with Kiosk Module, application shows an error message " `A reservable module assigned to Kiosk can't be shared with other experiences. Please update the Available-in accordingly` ". Remove all options in **Available in** before adding the Kiosk Module. For example, remove **Advanced Reservation**, **Quick Reservation**, **Outlook Add-in**, and so on.
All day	All day options can be set to:

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Field	Description
	○ Disabled: The All day option is disabled and isn't displayed on the Reservation portal. ○ Default: The All day option is available and the current office time is selected by default. For example, if you're making reservation at 11.30 am, based on your building time zone, the start time of the reservation is selected as 11.30 am. Employees change the timings, if necessary. ○ Enabled: The All day option is available and employees can reserve a space for a day. This configuration is dependent on the (sn_wsd_rsv.day_start) and (sn_wsd_rsv.day_end) reservation property. For more information, see Properties installed with Workplace Reservation Management. ○ Required: The All day option is displayed as selected and can't be changed. The All day field is set as required. Based on the building time zone, regular office hours as set by your administrator is shown. For example, 9 am to 5 pm. For more information, see Properties installed with Workplace Reservation Management.
All day meaning	Set the **All day meaning** to **Full day** (00 to 23.59) or **Office hours** (9 am to 5 pm). Timings are shown based on the building time zone. Full day setting ensures that employees or workplace users must book a space with a Reservable Module for an entire day or full day. The "All day" option is enabled by default on the reservation portal and the time can no longer be edited by employees or workplace users.
Max days in Future	Option to specify the maximum number of the days in the future up to which the reservable module can be reserved. For example, if you set the max number of days in future to 90, employees can make future reservations on this module only up to 90 days in advance. If this option is enabled, users can't select a date beyond the specified value in Max days in future while making a reservation. For more information, see Create a reservation.

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Field	Description
Min duration	Option to specify the minimum reservation duration of the reservable module. When you try to make a reservation beyond the Min duration value, an error message is on the shown on the Kiosk map.
Max duration	Option to specify the maximum reservation duration of the reservable module. When you try to make a reservation beyond the Min duration value, an error message is on the shown on the Kiosk map.
Show as	Option to specify the status of the reservation shown on the employee's calendar when a reservation is synchronized. This field appears only if Workplace Calendar synchronization is installed. ○ **Busy**: The reservation is displayed in the Employee's calendar with a Busy status. The employee's calendar is blocked during the reservation duration. ○ **Free**: The reservation is displayed in the Employee's calendar with a Free status. The employee's calendar won't be blocked during the reservation duration.

5. Select the **Reservation Widget Configuration** and select the **Require Subject** check box. If the **Require Subject** check box is selected, you're required to provide the **Reservation subject** in the Reservation Summary page.
6. After configuring the Kiosk Reservable Module, navigate to **Workspaces** > **Workplace Central**.
7. Select the Kiosk Indoor Mapping icon ( ) and configure the default map configuration for the Kiosk Reservable Module that you created (see Step 4).
   Kiosk default map configuration enables employees to select the Kiosk Reservable Module and assign spaces configured in the reservable module to it. Employees and guests can search for spaces and make reservations on the **Kiosk Map**. For more information, see Configure map features for kiosk.
8. After configuring the kiosk map, kiosk operators can bind or assign the kiosk to a device for employees and guests to make workplace reservations.
   For more information, see Setup a kiosk on a physical device for reservations.

   For more information, see Make workplace reservations on the kiosk.

Setup a kiosk on a physical device for reservations

Kiosk operators can bind the kiosk configuration to a physical device for employees and guests to make workplace reservations.

Before you begin

Role required: sn_wsd_kiosk.operator

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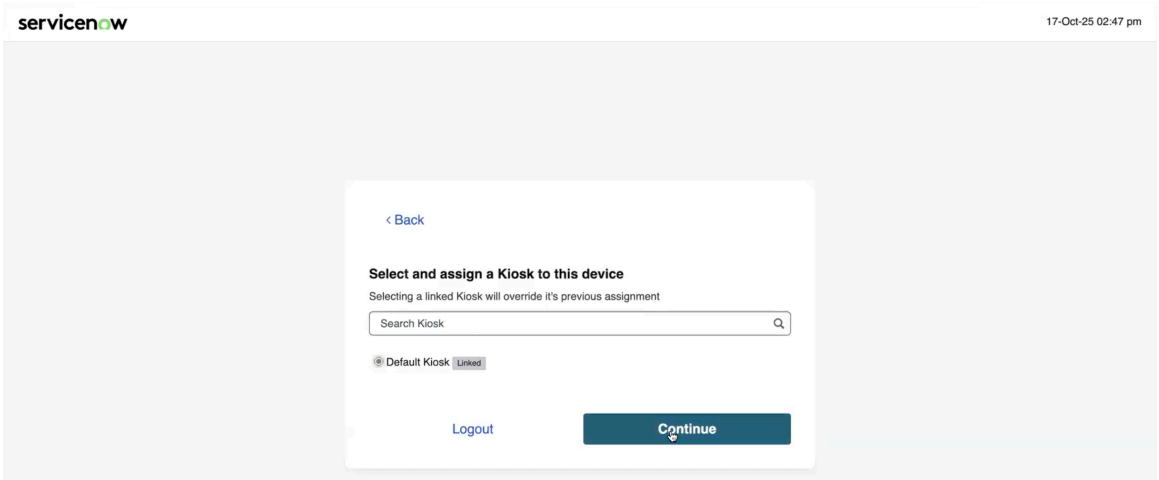
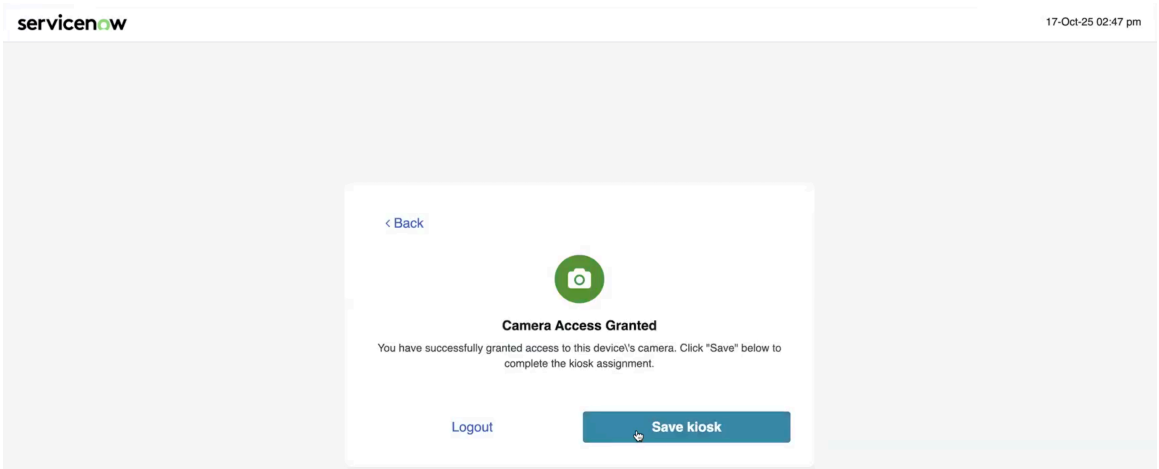
Procedure

1. Log in to the Workplace Services Kiosk instance.
2. On the kiosk setup welcome page for a device, select the **Select Kiosk** tab.



3. Search and select the kiosk that you want to assign to your device (for example, **Default kiosk**). The selected kiosk should be assigned to a Reservable module and should have spaces configured for it. For more information, see Configure Reservable Module for kiosk reservation.
4. Select **Continue** and enable the kiosk to access a physical device's camera.
5. Select **Save kiosk** to complete the kiosk assignment to a device.



6. The Welcome to the Kiosk setup page opens and shows the default kiosk as selected.

   You have successfully setup the kiosk on your device for workplace visitors and guests to make a reservation. For more information, see Make workplace reservations on the kiosk.

Integrating Workplace Services Kiosk

Integrate Workplace Services Kiosk with Workplace Service Delivery features to provide different experiences to kiosk users.

Integrating Workplace Services Kiosk with Workplace Visitor Management

Integrate Workplace Services Kiosk with Workplace Visitor Management to create a check-in, check-out, and self-registration experience for visitors.

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Integration Overview

1. Create page configurations based on the flows you want to support on the kiosk. For more information, see Configure pages for Workplace Services Kiosk.

   The Authentication, Summary, and End page configurations are required to support check-in and check-out flows. The Self registration page configuration is required to support the self-registration flow. Additionally, you can create an acknowledgment page to display visitor policies on the kiosk.

   You can customize the initial and additional requirements for the self-registration flow. For more information about creating visit requirements, see Configure visit requirements.

   Important: If the visitor policies for the acknowledgment page contain hyperlinks, visitors can use the links to leave the kiosk environment and they cannot return to the kiosk. The kiosk operator must reload the kiosk environment by using the kiosk URL.

2. Create check-in and check-out flows for the kiosk by using the page configurations. For more information, see Create a flow for Workplace Services Kiosk.

   Alternatively, you can use the default check-in and check-out flow that is included with the Workplace Visitor Management application.

   You can create multiple check-in and check-out flows and link them to different kiosk modules.

3. Create a kiosk module and module configuration. For more information, see Create a kiosk module.

   The kiosk module is linked to the check-in or check-out table to decide the flow and pages for the kiosk.

4. Create a homepage configuration. For more information, see Create a kiosk homepage.
5. Create a kiosk configuration, assign the homepage configuration, and link the kiosk module you created. For more information, see Create a kiosk configuration.
6. Assign the kiosk configuration to a kiosk device. For more information, see Setting up a kiosk device.

After integrating Workplace Services Kiosk with Workplace Visitor Management, visitors can use the kiosk to check-in, check-out, or self-register. For more information, see Using Workplace Services Kiosk.

If an error occurs on the kiosk at run time, a generic error page is displayed to the user. As an admin, you can find information about the errors in the system logs. For more information about error scenarios, see Workplace Services Kiosk error scenarios.

Integrating Workplace Services Kiosk with Workplace Indoor Mapping

Integrate Workplace Services Kiosk with Workplace Indoor Mapping to provide options to kiosk users to search for a space, get directions, and raise cases.

Integration Overview

1. Create a kiosk configuration that you want to use for indoor mapping. For more information, see Create a kiosk configuration.

   You can also use existing kiosk configurations if they fit your requirement.

   Note: You can create a custom homepage for the kiosk configuration or use the default one. For more information about creating a homepage, see Create a kiosk homepage.

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2. Create a map feature configuration from Workplace Central. For more information, see Configure map features for kiosk.
3. Set up the kiosk position and map settings. For more information, see Configure the kiosk position and map settings.
4. Configure a module for the kiosk indoor map. For more information, see Configure a module for kiosk indoor mapping.
5. Assign the kiosk configuration to a kiosk device. For more information, see Setting up a kiosk device.

After integrating Workplace Services Kiosk with Workplace Indoor Mapping, kiosk users browse the workplace, search for spaces, get directions, and raise cases. For more information, see Using Kiosk Indoor Mapping.

If an error occurs on the kiosk at run time, a generic error page is displayed to the user. As an admin, you can find information about the errors in the system logs. For more information about error scenarios, see Workplace Services Kiosk error scenarios.

The kiosk uses the **Kiosk general request** record producer to create a case from the **Raise an issue** modal. You can configure the record producer by navigating to **Workplace Case Management** > **Workplace Case Management - Setup** > **Record producers**.

Managing Workplace Services Kiosk

Kiosk operators can bind and unbind kiosk devices from kiosk configuration pages.

Configuration checklist

Setting up a kiosk device

Set up a kiosk device by assigning a kiosk to a physical device.

To enable usage of a kiosk device, you must select a kiosk for the device. The kiosk module displays the pages configured by an admin and visitors can use the device to check in and self-register. For more information about configuring kiosk devices, see Create a kiosk configuration.

You can access the kiosk page by using the following URL: `https://<instance name>.service-now.com/kiosk`

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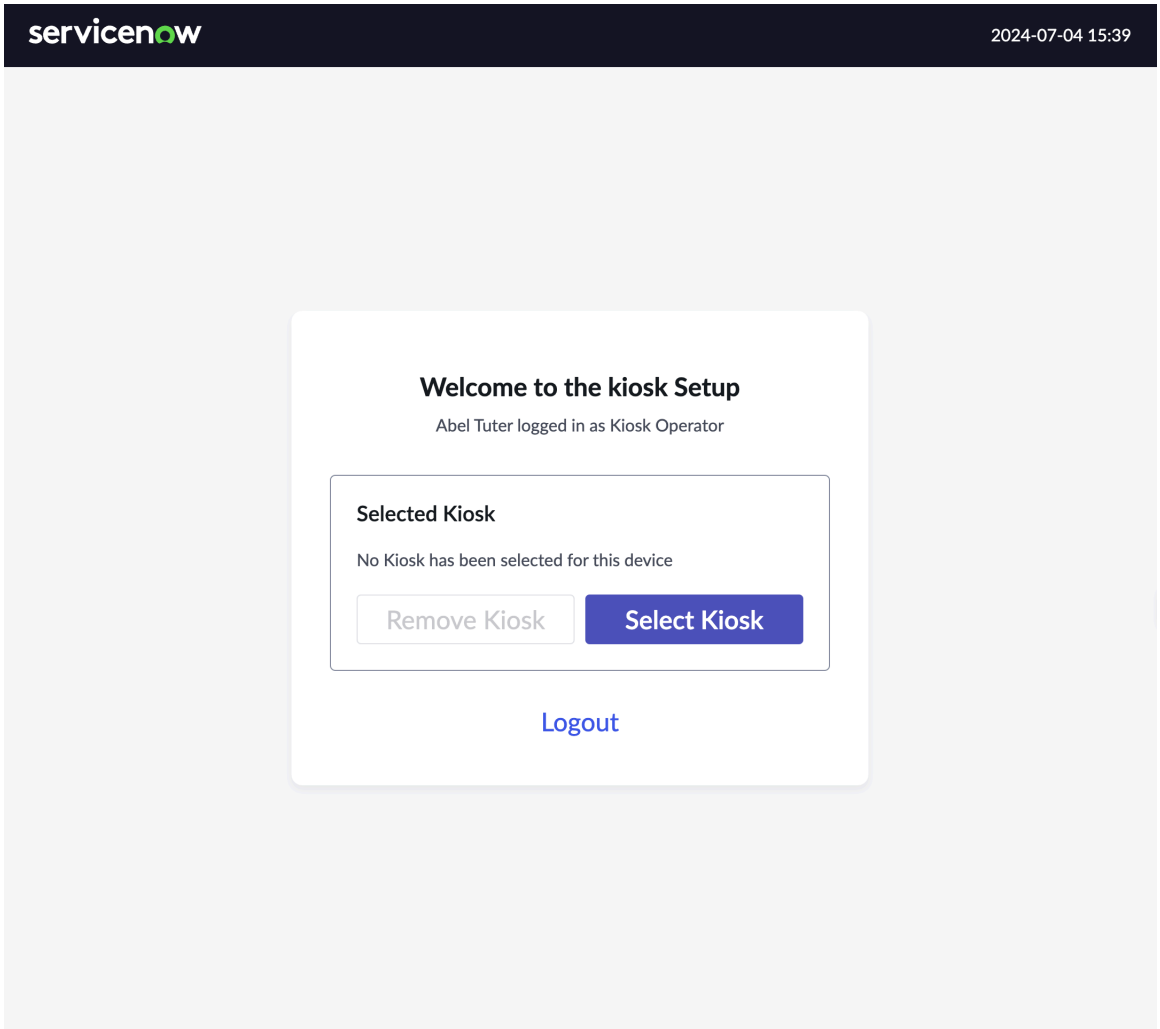

Select a kiosk for a device

Select a kiosk for the device to render the configuration pages created by the kiosk admin.

Before you begin

Role required: sn_wsd_kiosk.operator

Procedure

1. On a kiosk device, login using your operator credentials.
2. On the Kiosk setup page, select **Select Kiosk**.

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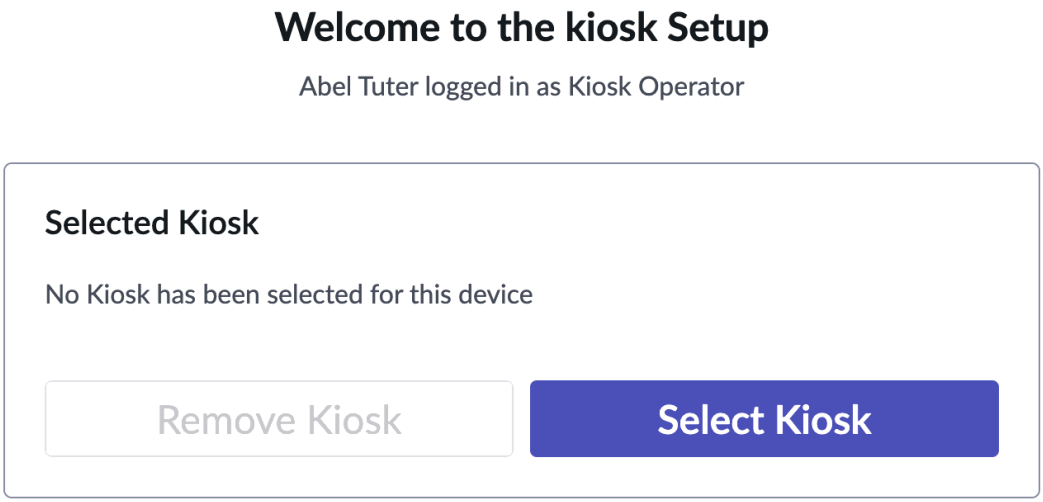
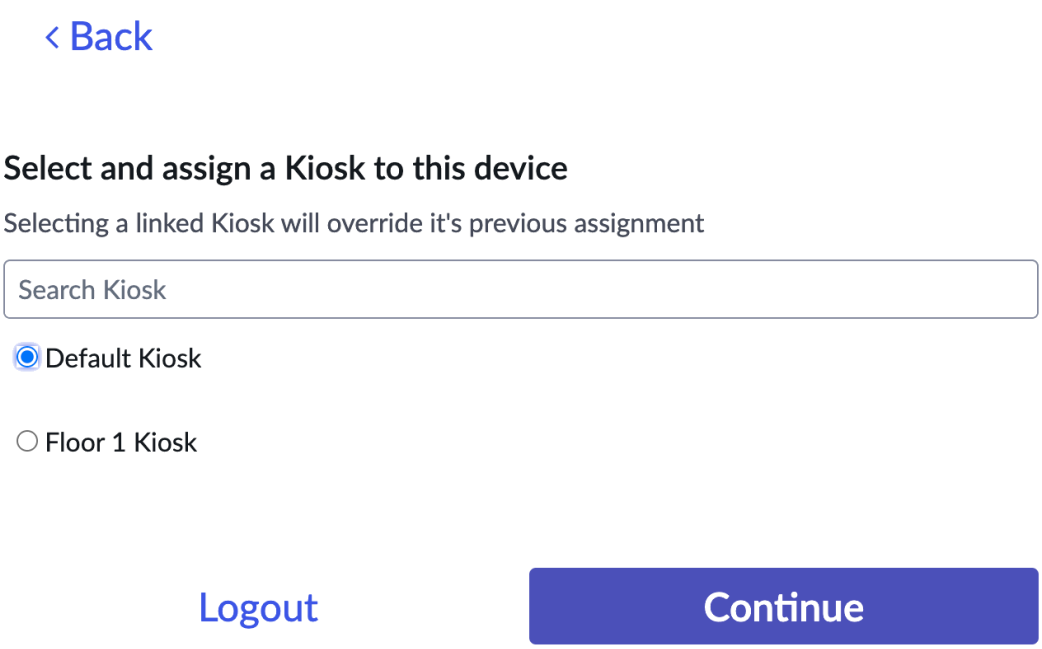


3. Select a kiosk from the list, then select **Continue**.



4. Optional: Provide camera permissions for the kiosk.

a. On the Allow camera access page, select **Continue**.

b. On your browser prompt, select the option to always allow camera access to the website.

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Note: If you are using the Apple Safari browser, you must allow the website to always access the camera from your browser settings.

Security features of Google Chrome on iOS don't allow permanent camera access to websites, therefore, camera-related functions of the kiosk are disabled.

c. After the camera access is granted, select **Save Kiosk**.

If you have existing kiosks that do not have camera permissions, you will receive a notification to update the kiosks and allow camera access.

Change or remove the kiosk for a device

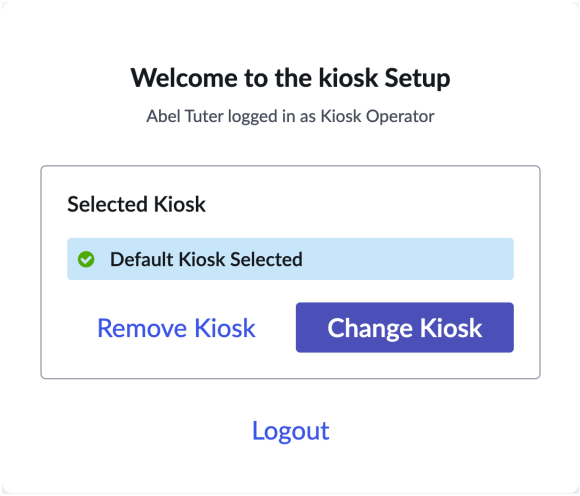
Assign a different kiosk or remove the assigned kiosk from a device.

Before you begin

Role required: sn_wsd_kiosk.operator

Procedure

1. On a kiosk device, login using your operator credentials.
2. On the Kiosk setup page, select any of the following options.

Option	Description
Remove Kiosk	Remove the assigned kiosk from the device.
Change Kiosk	Assign a different kiosk to the device by fol lowing these steps: **a.** Select **Change Kiosk**.  **b.** Select a kiosk from the list, then select **Con tinue**. **c.** On the Allow camera access page, select **Continue**.

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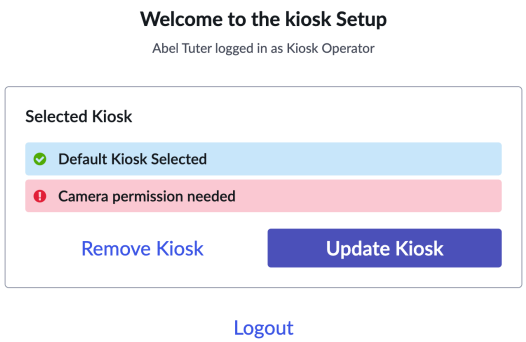
Option	Description
	d. On your browser prompt, select the option to always allow camera access. **Note:** If you are using the Apple Safari browser, you must allow the web site to always access the camera from your browser settings. Security features of Google Chrome on iOS don't allow permanent camera access to websites, therefore, camera-related functions of the kiosk are disabled.
Update Kiosk	Grant camera access to the kiosk by following these steps: **a.** Select **Update Kiosk**.  **b.** On the Allow camera access page, select **Continue**. **c.** On your browser prompt, select the option to always allow camera access. **Note:** If you are using the Apple Safari browser, you must allow the website to always access the camera from your browser settings. Security features of Google Chrome on iOS don't allow permanent camera access to websites, therefore, camera-related functions of the kiosk are disabled.

Using Workplace Services Kiosk

Workplace Services Kiosk provides a seamless check-in, check-out, and self-registration experience for visitors.

Check in using an invite

Check in as a visitor by using an invite from an employee. If visitors have an existing invite, they can check in to the kiosk using their passcode, email, phone number, or name.

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Before you begin

Note: Visitor authentication options can be configured in Workplace Visitor Management. Navigate to Administration from the context menu, and select **Page Configurations** to configure visitor authentication options.

Role required: sn_wsd_kiosk.viewer

Procedure

1. On the kiosk device, select **Check-in**.
2. Select any of the following check-in options.
   The invitation pass code is the default check-in option.

   Note: If the QR code is the default check-in option, the camera is enabled on the check-in page to scan the QR code.

   - Check-in with Qr-code
   - Check-in with invitation passcode
   - Check-in with email address
   - Check-in with phone number
   - Check-in with your name
3. Enter the information based on the check-in option, then select **Continue**.

   Note: If the provided information is incorrect or not linked to an invite, the kiosk device displays an error page. If the admin has enabled self-registration, you can register your visit by selecting **Register visit**. For more information, see Self-register as a visitor.

4. Verify the details of your visit, then select **Continue**.
5. **Optional:** Take a picture for the check-in process.

   a. On the Let's take a picture page, select **Continue**.

   b. Select the camera icon to start the timer for a picture.
   You can use the time to adjust your position.

   c. Select **Continue** to use the picture for your visit.
   You can also retake your picture by selecting **Retake**.

6. **Optional:** Read the visitor policies, then select **Acknowledge**.
   Based on the configuration set by the admin, you might have to add a signature to acknowledge the policies.

   Note: If you have already signed and agreed to the policies before your visit, the policies might still be displayed based on the configuration set by the admin.

7. View the next steps, then select **Done**.

Self-register as a visitor

Register as a visitor by providing your details such as your name, purpose of the visit, and host.

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Before you begin

The self-registration flow must be configured and enabled by the admin. You can self-register only if you try to check-in and the kiosk device displays a `No visit found` page.

Role required: sn_wsd_kiosk.viewer

Procedure

1. On the error page, select **Register visit**.
2. On the Register your visit page, enter the following details, then select **Continue**.
   - Your email address
   - Visit description
   - Host name

   Note: The fields might change based on the initial requirements that are set by the admin.
3. On the Complete your information page, enter the following details, then select **Continue**.
   - First name
   - Last name
   - Phone number
   - Job title
   - Parking preferences
   - License plate

   Note: The fields might change based on the additional requirements that are set by the admin.
4. **Optional:** Take a picture for the check-in process.
   a. On the Let's take a picture page, select **Continue**.
   b. Select the camera icon to start the timer for a picture.
   You can use the time to adjust your position.
   c. Select **Continue** to use the picture for your visit.
   You can also retake your picture by selecting **Retake**.
5. Read the visitor policies, then select **Acknowledge**.
   Based on the configuration set by the admin, you might have to add a signature to acknowledge the policies.
6. View the next steps, then select **Done**.

Using Kiosk Indoor Mapping

Use the kiosk indoor mapping feature to search for spaces, get directions, and raise cases.

You can access the kiosk indoor map by selecting **Explore workplace** on the kiosk. You can then use the indoor map to do the following.

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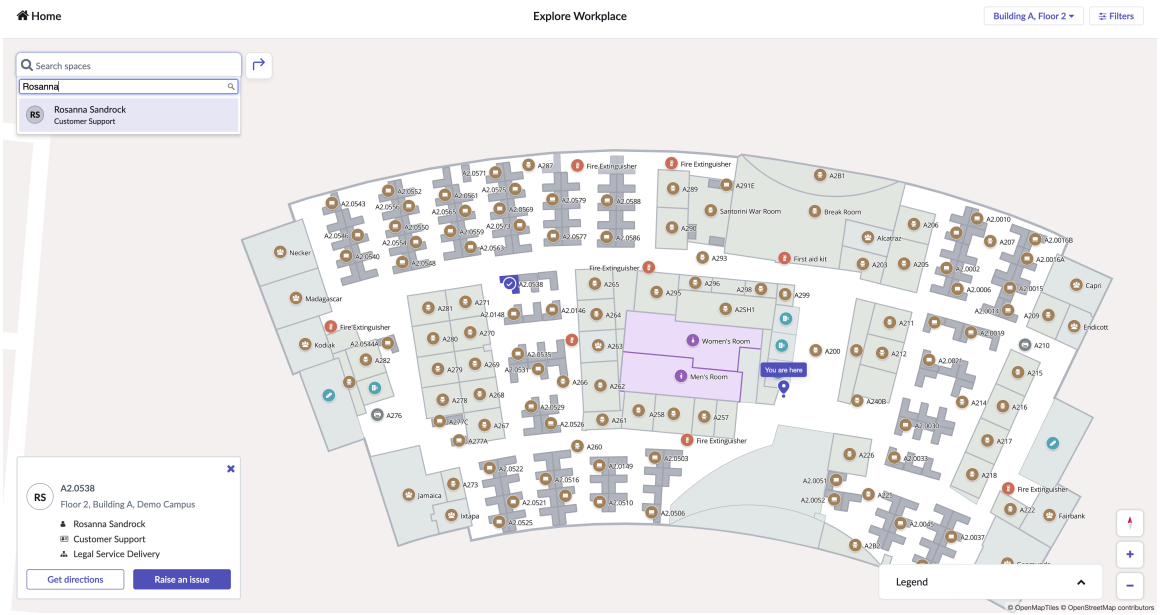
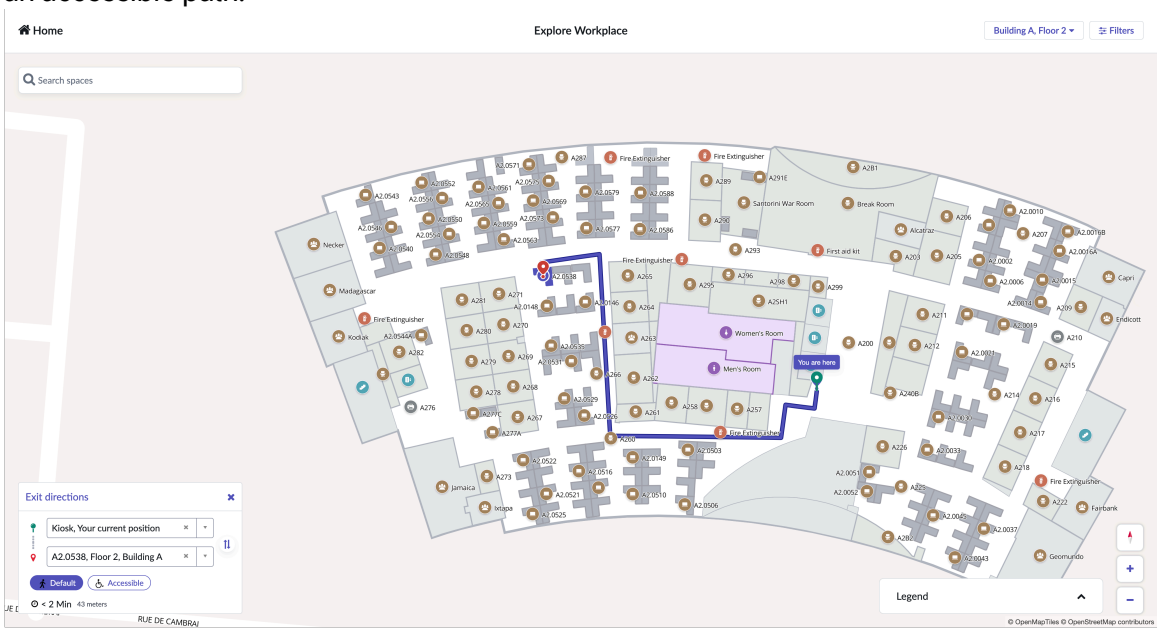
- Pan, rotate, or zoom the map based on your requirement. You can select the reset camera button to reset the map to its default position.
- Select a different building or floor to browse the relevant map.
- Filter spaces based on neighborhoods, reservation and occupancy status, and space type.
- Search for a user or a space by using the search bar and selecting the relevant result. The kiosk highlights the space and displays information such as the user assignment, department, and neighborhood. The information displayed can differ based on the configuration set by the admin.



- View the map legend for information about the icons and elements on the map.
- Get directions to a space after selecting it from the map or the search bar. The kiosk displays the path to your destination, which can be on a different floor or building. You can also opt for an accessible path.



You can also get directions to a space by selecting the directions button ( ), then selecting the destination.

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You can enable step-by-step directions and also select the units that you want to use for the distance. You can select either feet or meters as the measurement unit. The default unit is set based on the kiosk location.

- Raise an issue after selecting a space from the map or the search bar. The kiosk displays a form where you can provide details about the issue, select the urgency, and select a user to raise a request on their behalf.

Make workplace reservations on the kiosk

Workplace visitors and guests with kiosk viewer role can make workplace reservations. They can search and select a space on the Kiosk Map to reserve a space.

Before you begin

Install and configure the following from the ServiceNow Store.

- Workplace Reservation Management
- Workplace Services Kiosk
- Workplace Central
- Workplace Indoor Mapping
- Workplace Core
- Workplace Space Management

Make sure that your device is set up on a kiosk to enable workplace reservations. For more information, see Setup a kiosk on a physical device for reservations.

You can't add workplace services to a reservation in kiosk. Recurring, neighborhood, and browse near a person reservations aren't supported for kiosk reservation.

Role required: sn_wsd_kiosk.viewer, sn_wsd.core_workplace_user

Note: The sn_wsd.core_workplace_user (workplace user) role is part of the kiosk viewer role. Employees can log in with the sn_wsd.core_workplace_user role to view, search for spaces on a floor map and make a reservation. For more information, see Components installed with Workplace Services Kiosk.

Role: sn_wsd_kiosk.viewer.

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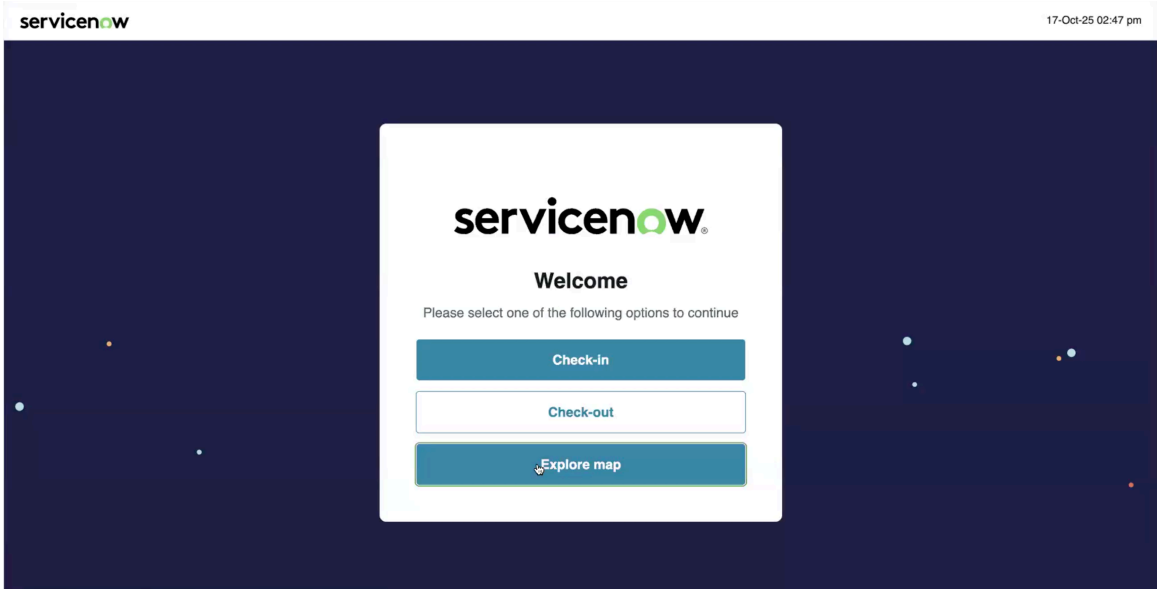
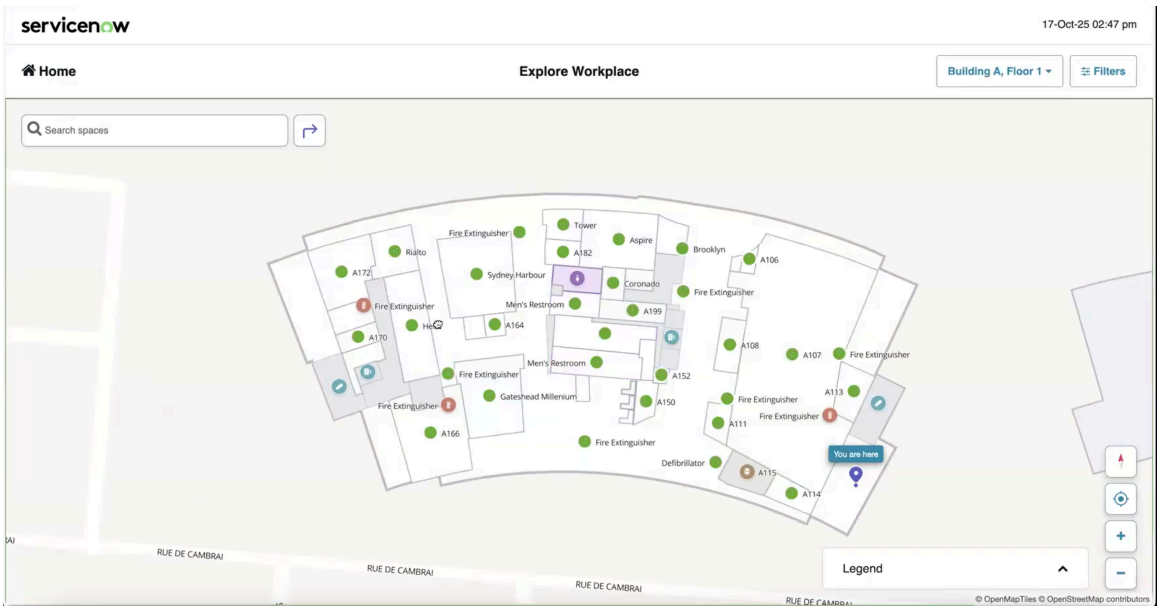
Procedure

1. Log in to your instance with the kiosk viewer role.



2. Select **Explore Map**.
   The Explore Workplace page opens and displays workplace locations on the map.



3. From the menu, select **Building** and **Floor** to select a building and a floor.
4. Zoom in and select a space on the map to make a reservation.
5. Space details card for the selected space shows the **Get directions** and **Reserve** button.

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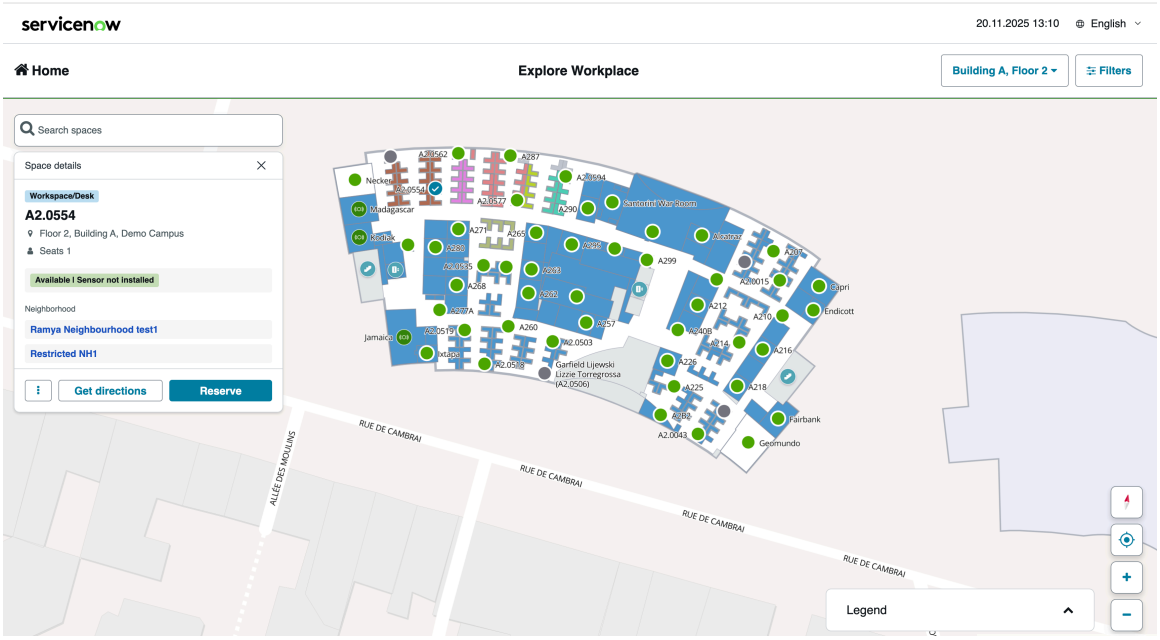
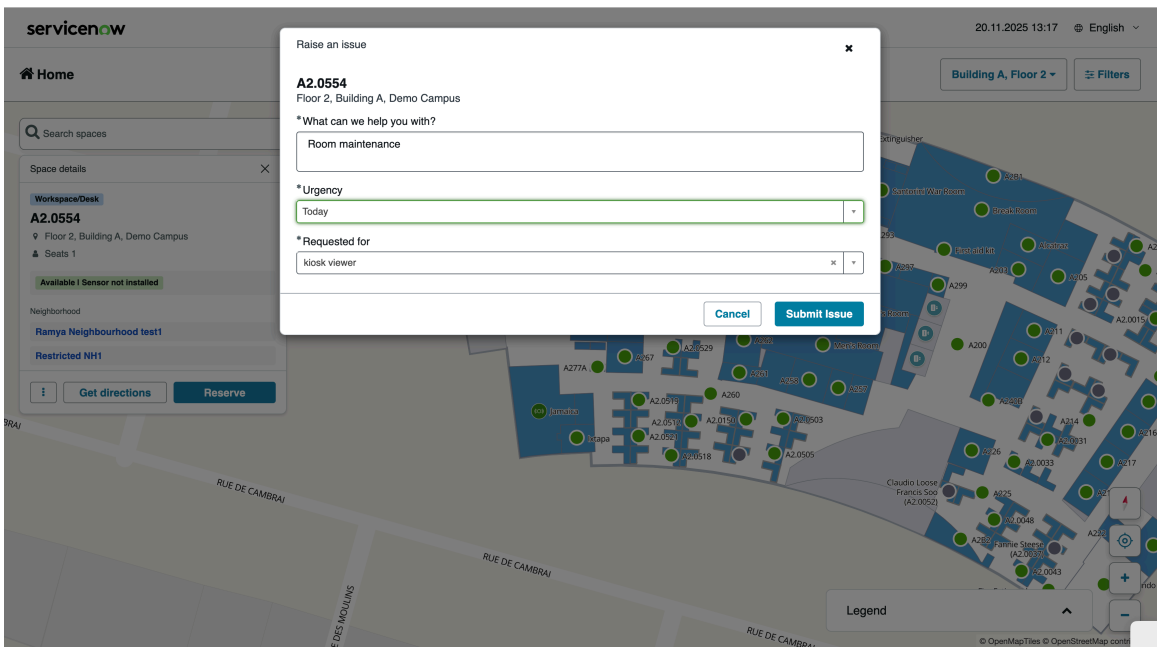


If the selected space is already reserved, it shows the **Raise an issue** tab. Raise an issue tab is also shown if the space type configuration in the Reservable Module configuration for the kiosk doesn't match the space type configuration of a selected space.

- Select the ellipsis icon (⋮) and select **Raise an issue**.

  The Raise an Issue form opens.



- On the form, fill in the field information.

Raise an Issue form

Field	Description
What can we help you with?	Option to provide the workplace issue for which you want to raise a case.

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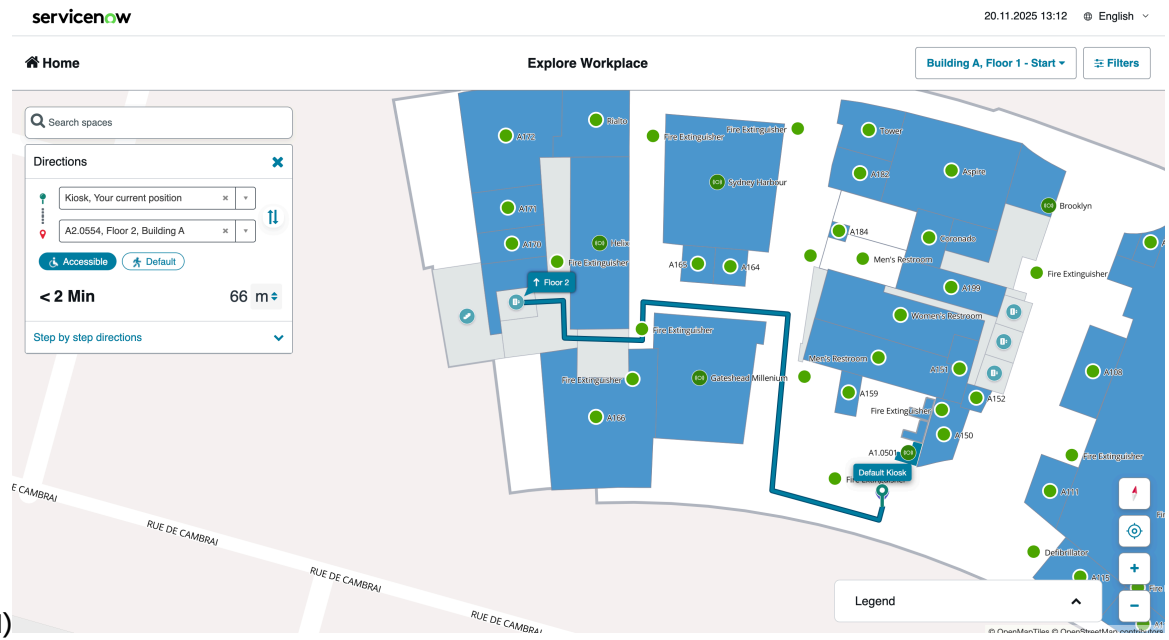
Field	Description
Urgency	Option to prioritize the urgency of the case. Select any of the following options: ▪ Today ▪ This week ▪ Next week
Requested for	Search and select a user for whom you are raising the workplace issue.

6. Select **Reserve** to create a workplace reservation.

> **Note:** Space types configured for you by your administrator are displayed on the map. For example, Meeting rooms or Desks/Spaces. If your administrator has set the space type configuration as Desks/Spaces in the Kiosk Reservable module, the floor map shows only desks or space. If the space type configuration is meeting rooms, the map shows meeting rooms for reservations. For more information, see Configure Reservable Module for kiosk reservation.

7. **Optional:** Select **Get Directions**.



(Optional)

Select your current position on the map, and select the location on the map for getting directions on the map.

Select **Accessible** or **Default** for getting directions to a workplace on the map.

8. The Reserve a space page opens and the selected space is shown on a schedule view calendar.

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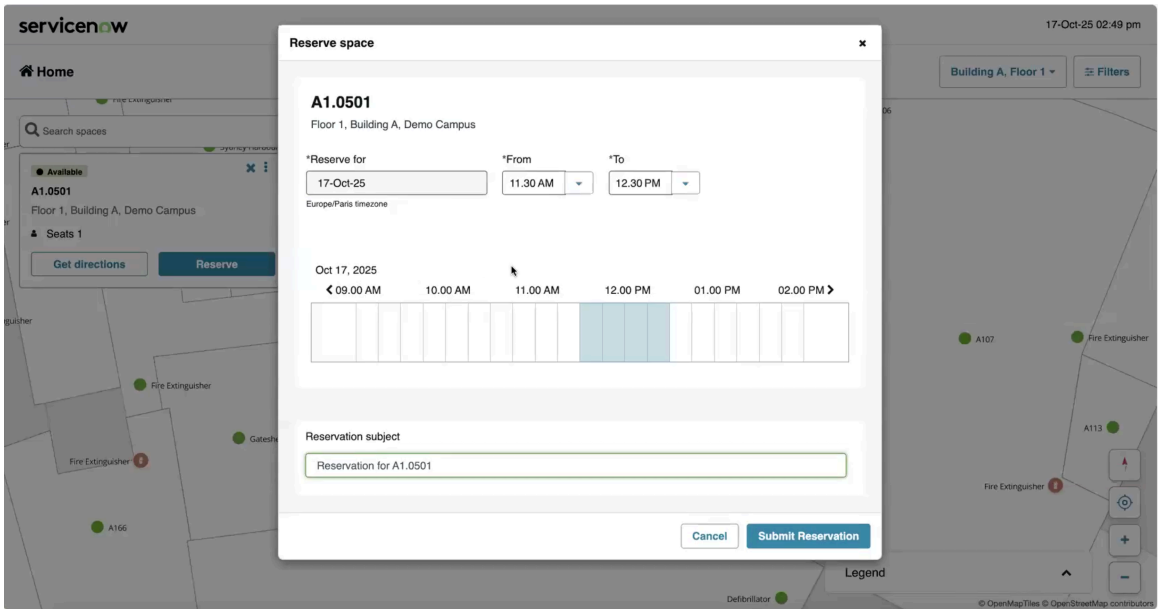

On the form, fill in the information.

Reserve a space

Field	Description
Reserve for	Option to select a date. If **All day** Reservable module configuration is set to **Disabled**, the current date is selected and the **Reserve for** option is read-only. If Max days in future value is set to more than 1, the **Reserve for** option shows options to select calendar dates.
From	Option to select the start time of the reservation.
To	Option to select the end time of the reservation.
Reservation subject	Option to provide the Reservation subject details. For example, Reservation for AI workflows. If the **Require Subject** check box is selected in the **Reservation Widget Configuration** tab, you're required to enter the Reservation Subject label while submitting the reservation. For more information, see Configure Reservable Module for kiosk reservation

When All day **Reservable Module** setting is set to **Default** on the Reservable module configuration, you see the actual time when you're making a reservation. For example, if you're making the reservation at 11.24 am, reservation start time shows **11.24**. Start and end time for a reservation are based on the building time zone and reservation properties for setting office hours. For more information, see Properties installed with Workplace Reservation Management.

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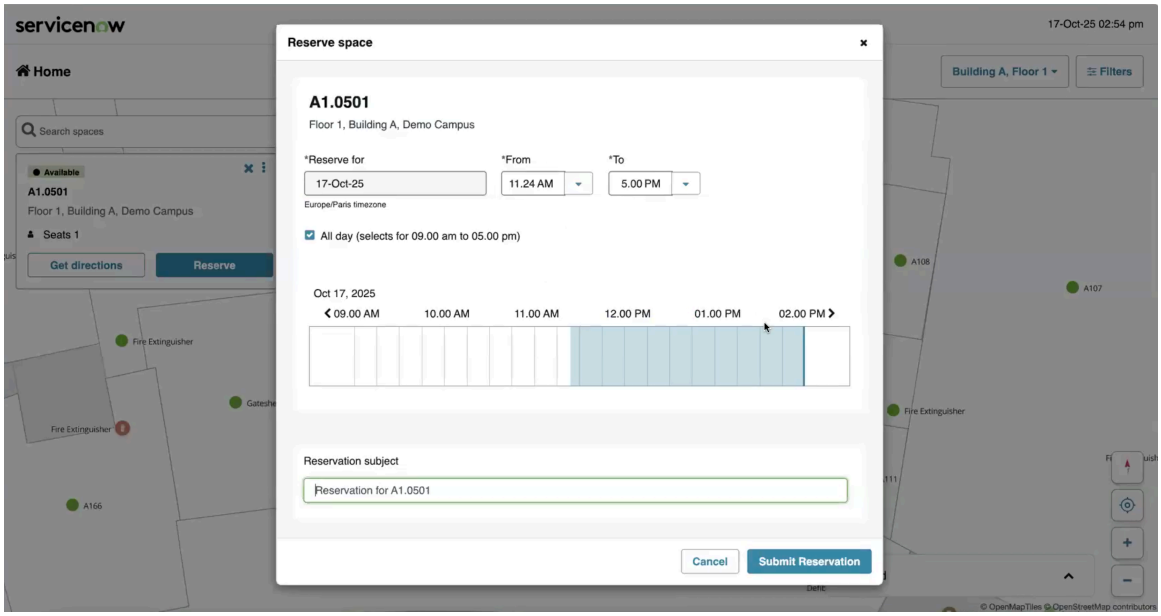
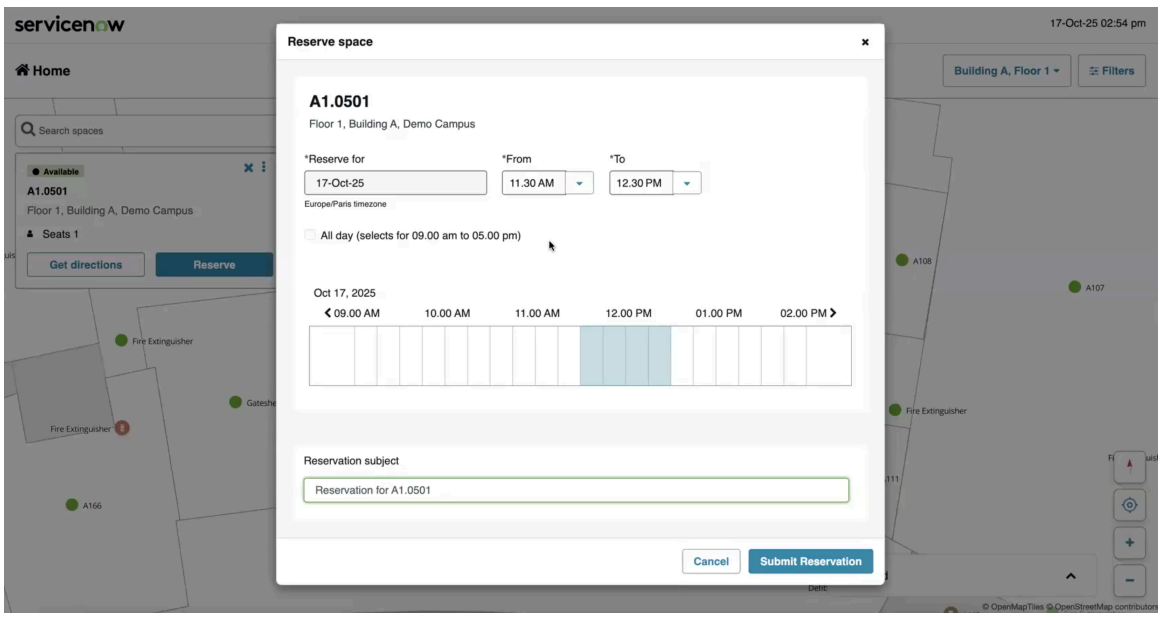


If **All day** Reservable configuration is set to **Enabled**, the reservation start and end timings are rounded off. For example, 11.30 am to 12.30. The All day check box isn't selected with office timing shown from 9 am to 5 am. The timing shown depends on your office start time and end time.



If **All day** Reservable module configuration is set to **Required**, the **All day** check box shown in read-only mode and you can't change the start time and end time. The building's current time is shown based on the building time zone.

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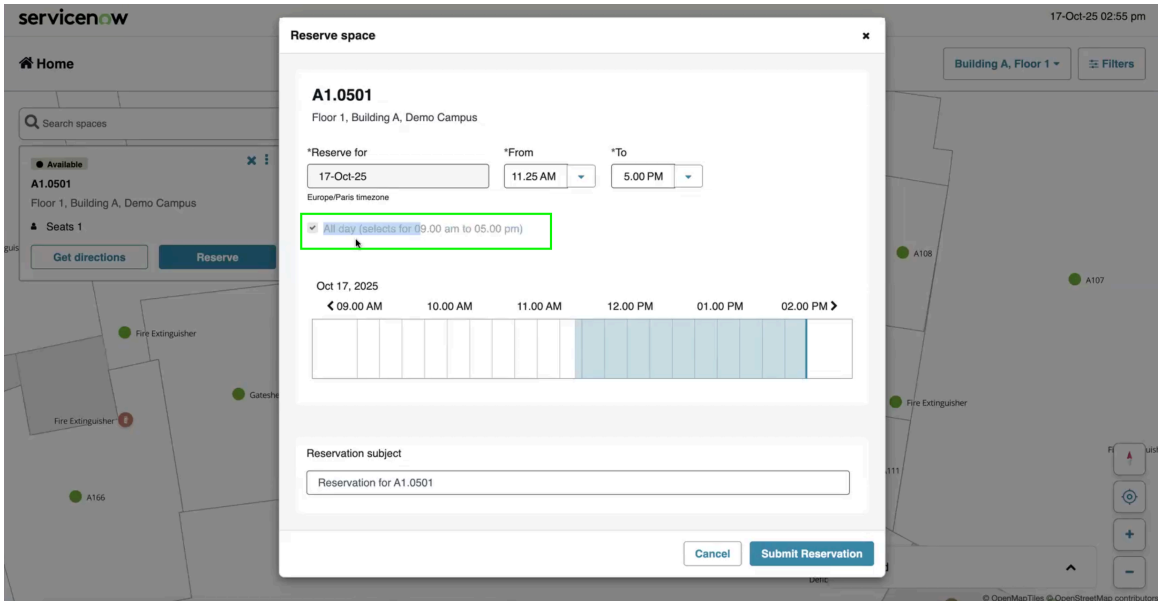

Note: If you're trying to book a space beyond the time specified in the Min or Max duration, application displays an error message. The **All day**, **Min duration** and **Max day duration** values are set by your administrator. For more information, see Configure Reservable Module for kiosk reservation.

9. Select **Submit Reservation**.

   If a reservation can't be created for a space that is already reserved, a message is displayed informing the employee that the space isn't available anymore. The schedule view is refreshed with the latest search results. The **Submit reservation** button is inactive. The employee can change the date or time to find a new, available slot.

   Note: After your reservation is confirmed in the kiosk, email notifications aren't sent to workplace users.

Workplace Services Kiosk reference

Reference topics provide additional information about the lists and forms used in Workplace Services Kiosk.

Components installed with Workplace Services Kiosk

Several types of components are installed with activation of the Workplace Services Kiosk plugin, including tables, user roles, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with Workplace Services Kiosk

Role	Description	Contains roles
sn_wsd_kiosk.admin	Has access to configure the	None

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Roles installed with Workplace Services Kiosk (continued)

Role	Description	Contains roles
	kiosk features and experience.	
sn_wsd_kiosk.operator	Has access to bind a kiosk configuration to a physical kiosk device.	None
sn_wsd_kiosk.viewer	Has access to view and use the kiosk experience.	sn_wsd.core_workplace_user. Workplace users can make reservations using the kiosk map. For more information, see Make workplace reservations on the kiosk

Tables

Tables installed with Workplace Services Kiosk

Table	Description
Kiosk configuration [sn_wsd_kiosk_configuration]	Stores information about the kiosk configurations created in the application.
Kiosk module configurations [sn_wsd_kiosk_device_m2m_module_configuration]	Stores information about the modules created for a kiosk configuration.
Kiosk homepage [sn_wsd_kiosk_home_page]	Stores information about the homepages that are created for kiosks.
Kiosk module [sn_wsd_kiosk_module]	Stores information about the modules that are displayed on kiosk devices.
Kiosk module configuration [sn_wsd_kiosk_module_configuration]	Stores information about the configurations created for a kiosk module.
Kiosk Status [sn_wsd_kiosk_last_alive]	Stores information about the status of kiosk devices such as the date and time of the last activity on the kiosk and the status of the camera permission.

Properties

Properties installed with Workplace Services Kiosk

Property	Description
sn_wsd_kiosk.kiosk_reset_delay	Specifies the duration of inactivity before the kiosk resets to the home page.

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Properties installed with Workplace Services Kiosk (continued)

Property	Description
sn_wsd_kiosk.kiosk_heartbeat_delay	Specifies the duration after which the kiosk pings the instance to update the **Kiosk Status** table.

Kiosk configuration form

Use the Kiosk configuration form to create a kiosk device configuration.

Kiosk configuration form

Field	Description
Name	Name of the kiosk device.
Homepage configuration	Homepage configuration that must be linked to the kiosk device.
Managed by	User group that can manage the kiosk device.
Location	Location of the kiosk device. The company policies and the list of hosts are displayed based on the selected location. Ensure that the location is not a site or a region. The location must be a campus, a building, or a lower order location. **Note:** To display employees in the list of hosts, the kiosk location must match with the Workplace Profile location of the employees.
Description	Description of the kiosk device.
Default language	Default language displayed on the kiosk device.
Single module mode	Option to enable only a single module for the kiosk configuration. If you have multiple modules linked to the configuration, the module with the lowest order is displayed on the kiosk.
Device ID	Auto-generated identifier for the kiosk device.

Workplace Services Kiosk error scenarios

Find the cause and related information of kiosk errors in the system logs.

The Workplace Services Kiosk displays a generic error page to the user when an error occurs. As an admin, you can find information about the errors in the system logs. An error can occur in the following scenarios:

- The kiosk doesn't provide the required parameters.
- The flow configuration record isn't found in the Kiosk module configuration [sn_wsd_kiosk_module_configuration] table.

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- The indoor map configuration record isn't found in the Kiosk indoor mapping configuration [sn_wsd_indoor_map_kiosk_configuration] table.
- The configured view type isn't accessible by the kiosk viewer [sn_wsd_kiosk.kiosk_viewer] role.
- The configured campus isn't part of the configured view type.
- The floor where the kiosk camera is set isn't part of the configured view type.
- The floor where the kiosk is positioned isn't part of the configured view type.

Now Assist for Workplace Service Delivery (WSD)

Now Assist for Workplace Service Delivery (WSD) elevates your Workplace Services experience with generative AI capabilities.

Get started

Explore



Learn more about Exploring Now Assist for Workplace Service Delivery (WSD)

Configure



Install and configure Configuring Now Assist for WSD

Using AI agent workflows in Now Assist for WSD



Use the AI agent use cases in Now Assist for Workplace Service Delivery (WSD)

Using



Use generative AI capabilities offered by Using Now Assist for WSD

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

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Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect data about workplace requests (e.g. reservations). Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

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Exploring Now Assist for Workplace Service Delivery (WSD)

The Now Assist in Virtual Agent assists Workplace Service Delivery workplace employees to book meeting spaces conveniently and quickly.

Now Assist for Workplace Service Delivery (WSD) overview

Now Assist for Workplace Service Delivery (WSD) provides workplace users with a streamlined, conversational experience based on generative AI. Workplace employees can submit a workplace reservation request to reserve a space and add services to a reservation. Now Assist for Workplace Service Delivery (WSD) enhances the user experience by combining AI Search with Now Assist in Virtual Agent generative AI chat skills.

The generative AI capabilities provides a human-like conversational experience for Workplace Reservation Management reservation request submissions.

Now Assist for Workplace Service Delivery (WSD) users

Users

User	Description
Workplace Reservation Management administrators	The Now Assist for Workplace Service Delivery (WSD) retrieves details from Workplace Reservation Management and provides workplace users by leveraging the Now Assist Gen AI capabilities. • Reserving a space for meeting • Adding co-workers to a reservation • Adding visitors or guests to a reservation • Adding a Zoom meeting link for remote joining • Ordering and adding catering services
Agentic AI Workflow	The following Agentic AI workflows are available for Now Assist for WSD: • Reserve a space quickly with Create a reservation AI agent • Manage temporary space closures • Help manage workplace reservations • Optimize cleaning activities • Automate map updates For more information, see Using AI agent workflows in Now Assist for WSD

What to explore next

To learn more about configuring and using Now Assist for Workplace Service Delivery (WSD), see:

- Configuring Now Assist for WSD
- Using Now Assist for WSD

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Supporting information for Now Assist for WSD

Get a quick overview for supported patch versions and application information.

Supported Versions

Now Assist for WSD (sn_wsd_gen_ai) is supported on Australia v1.1.0

Application Information

Activate the Now Assist for Workplace Service Delivery (WSD) store app to create a reservation.

Installing Now Assist for Workplace Service Delivery (WSD) (sn_wsd_genai) activates the dependent plugin, Now Assist for Platform (sn_genai_platform)

.

Configuring Now Assist for WSD

Install and configure Now Assist for Workplace Service Delivery (WSD). As a system administrator configure the Now Assist for WSD application so that workplace reservation requesters can leverage the Now Assist generative AI capabilities.

Configuration overview

1. Install Now Assist for Workplace Service Delivery (WSD)
2. Configure Now Assist in Virtual Agent for Workplace Service Delivery

Install Now Assist for Workplace Service Delivery (WSD)

install and activate Now Assist for Workplace Service Delivery (WSD) from ServiceNow® Store.

Before you begin
The System Admin (admin) role is required to install the application.

Make sure that you have installed and configured the following dependent applications:

- Now Assist for Platform (sn_genai_platform)
- Workplace Reservation Management
- Workplace Case Management
- Workplace Visitor Management
- Workplace Concierge

Role required: admin

Procedure

1. Navigate to **System Definition** > **Plugins**.
    - For information about the plugin dependencies and plugin activation order, see Application information.
    - For information about the installation process, see Install Now Assist plugins.
2. Select **Sync now** to synchronize the plugins page with your freshly entitled store application.
3. Search in the search bar for a Now Assist product.

    Search for Now Assist for Workplace Service Delivery (WSD) (sn_wsd_gen_ai).

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4. Install the plugin and return to your instance.

> **Note:** Installing Now Assist for Workplace Service Delivery (WSD) (sn_wsd_gen_ai) activates and installs the Now Assist for Platform (sn_genai_platform).

Configure Now Assist in Virtual Agent for Workplace Service Delivery

Enable your employees to submit a reservation request using a conversational experience based on generative AI.

About this task

Workplace users can leverage the Now Assist in Virtual Agent by configuring the Now Assist for WSD. Now Assist for Workplace Service Delivery (WSD) can be configurted to reserve workplace items, invite visitors, and add extra services. The Now Assist in Virtual Agent application provides conversational experiences for Workplace Service Delivery flows.

For more information about Now Assist in Virtual Agent, see Now Assist in Virtual Agent.

Before you begin

Make sure that you have installed the following applications from the ServiceNow Store:

- Installing Now Assist for Workplace Service Delivery (WSD) activates and installs Now Assist for Platform (sn_genai_platform)
- Workplace Reservation Management
- Workplace Visitor Management

  Workplace Visitor Management is applicable for the **Add Visitors to Reservation** topic block and is optional.

- Workplace Case Management

  Workplace Case Management is applicable for the **Add Catering to Reservation** topic blocks, and is optional.

> **Note:** The following topic blocks are published by default.
>
> - Add Catering to Reservation
> - Add Zoom to Reservation
> - Add Visitor to Reservation
>
> To run the related subflows, the required application must be installed and the feature must be enabled in the reservable module configuration.

Role required: admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
2. From the **LLM Assistant** list, select **Now Assist in Virtual Agent**.
3. Publish the **Reserve Space** topic.
   For more information about publishing a topic, see Publish a Virtual Agent topic.
   The Reserve Space topic is published and can be used from the Virtual Agent.

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What to do next

- Create a reservable module to group similar workplace items into a category. For more information, see Configure a reservable module.
  - Enable virtual meeting links for your reservation by configuring a virtual meeting provider. For more information, see Configure virtual meeting providers.
  - Provide extra services, such as catering, for the reservations by creating workplace services and adding them to workplace locations. For more information, see Create a workplace service to provide an extra service for a reservation.
- Select the portals and channels that the Virtual Agent is displayed on. For more information, see Configuring assistants overview.

  Note: Selecting the Workplace Service Portal for Now Assist in Virtual Agent replaces the existing NLU experience.

- Use the Virtual Agent to reserve a workplace item, add services, and invite visitors. For more information, see
  Using Now Assist in VA to reserve a workplace item .

Modify the LLM (LLM) for WSD

Modify or update a LLM (LLM) to generate for Now Assist for WSD.

Before you begin

Third-party LLM providers are available for Now Assist skills and AI agents in addition to Now LLM Service. For more information on LLMs in Now Assist. For each Now Assist in Document Intelligence use case, only one LLM can be enabled at a time. Now Assist employs the selected LLM when processing documents for the use case.

Note: Now LLM Service, AWS Claude, Azure OpenAI, and Google Gemini are the supported LLM model providers on Now Assist for WSD.

Role required: admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Settings** > **Manage model providers**.
2. Review the following options the Manage mode providers workflow page:
   - Policy Summary set by your organization regarding non-compliant model provider usage.
   - Model providers assigned to Now Assist Now Assist for WSD.
3. Select the **Edit Model provider** tab to change the LLM model provider.
4. Select an LLM model provider from the **Default model provider** list.

   Select **Azure Open AI** to modify the default LLM model provider. Total impacted skills on changing the LLM model provider are displayed.

   You can edit the model provider for an instance or customize it to update it at a skill or skill group level.

5. **Optional:** Select the **Instance** card to update the model provider for all the skills and skill groups in an instance.
6. Select **Save and activate** to update the LLM model provider.

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Configure Now Assist Panel Platform Agent

Administrators can enable conversational features by setting up the Now Assist panel, mapping user intents to workflows, and connecting agents to relevant knowledge graphs for reservations, connectors, and utilization.

About this task

Workplace users can leverage the Now Assist Panel-Platform by configuring the Now Assist for WSD. Now Assist for Workplace Service Delivery (WSD) can be configured to handle queries about reservations, connectors, and utilization. The Now Assist Panel Platform application provides conversational experiences for Workplace Service Delivery flows.

For more information about Now Assist in Virtual Agent, see Now Assist in Virtual Agent.

Before you begin

Make sure that you have installed the following applications from the ServiceNow Store:

- AI Agents for Workplace Service Delivery
- Workplace Reservation Management

Role required: admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
2. From the **LLM Assistant** list, select **Now Assist Panel-Platform Agent (default)**.
3. On the Now Assist Panel - Platform (default) form, navigate to **Now Assist skills**.
4. In the Conversational skills section, make sure to select the **AI agents** Now Assist skill.
5. Navigate to Display experience and select **Unified Navigation app shell** agent experience from the Add agent experience drop-down list.
6. Navigate to other tabs and review the details.
7. Select **Save and activate**.

Enable Now Assist panel

Enable Now Assist panel to activate conversational capabilities, map user intents to workflows, and link agents to relevant knowledge graphs for reservations, connectors, and utilization.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select the Overview tab.
3. Select Workplace Advisor QnA Agentic workflow.
4. On the form, navigate to Select channels and status.
5. In the Engage via the Now Assist panel section, make sure the **Display** toggle is turned on.
6. Select **Save and test**.

Configure the Workplace Case Summarization Skill

As an admin, you can customize the Workplace Case Summarization skill to include additional fields for the case summary.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Now Asisst Admin** > **Skills**.
2. On the Now Assist Skills tab, select **Employee**, then select **WSD**.
3. Create a copy of the `Workplace Case Summarization` skill for customization.
4. From the context menu of the newly created skill, select **Edit**.
5. Edit any of the following sections based on your requirement.

Section	Description
General details	You can edit basic information about the skill like the name, workflow, LLM, and skill tem plate.
Choose input	You can select the fields to be included as an input for the summarization skill. For example, you can add the start and end time fields as an input to the summary. You can customize inputs for every state of the case like new, work in progress, or re solved. For more information about customizing the in put fields, see Configure case or incident sum
Customize prompt	You can add or remove sections that are in cluded in the generated summary. You can customize the prompts for every state of the case like new, work in progress, or resolved. For more information about customizing the prompt output, see Configure case or inci dent summarization in the Now Assist Admin
Role attribution	You can select the table, fields for the re quester and fulfiller, and fulfiller roles for the skill.
Define availability	You can customize whether the skill is avail able by default, or only available based on the configured conditions. For more informa tion about the availability, see Activate a Now
Define access	You can add roles to provide access to summarize a case. For example, `sn_wsd_core.workplace_manager`.
Select display	You can configure where the case summariza tion feature is displayed. For more information

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Section	Description
	about configuring the display, see Activate a

6. After you make your changes, save the skill and exit.

Configure the Workplace Concierge email address

Configure the email address that is used for the Workplace Concierge.

Before you begin
Role required: admin

Procedure

1. In the filter navigator, enter `sys_properties.list`.
2. In the System Properties list, select the **sn_wsd_concierge.concierge_inbound_email** system property.
3. In the **Value** field, enter the email address to be used for the Workplace Concierge.
4. Save the system property record.

Result
The Workplace Concierge is configured. Users with the `sn_wsd_core.workplace_user` role can add the email address to a calendar invite or email thread and use the Workplace Concierge to create visits and invite visitors. For more information about using Workplace Concierge, see Use Workplace Concierge with email or calendar invite.

Using Now Assist for WSD

Using Now Assist for Workplace Service Delivery (WSD) for creating a reservation.

Overview of Now Assist for WSD

Now Assist for Workplace Service Delivery (WSD) enhances your ServiceNow® Workplace Services experience with generative AI capabilities. Enhance the employee experience by using a generative experience to interact with your physical workspace.

It allows employees the following:

- Reserving a space for meeting
- Adding co-workers to a reservation
- Adding visitors or guests to a reservation
- Adding a Zoom meeting link for remote joining
- Ordering and adding catering services

Reserve a space using Now Assist in Virtual Agent

The Reserve Space Virtual Agent topic enables you to create a reservation using Now Assist for Workplace Service Delivery (WSD). You can also add services to your reservation.

Before you begin
The **Reserve Space** topic should be added to Now Assist in Virtual Agent. For more information, see Configure Now Assist in Virtual Agent for Workplace Service Delivery.

Make sure that you have the following applications:

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- Now Assist for Platform (sn_genai_platform)
- Workplace Reservation Management Workplace Reservation Management (sn_wsd_rsv)

Role required: sn_wsd_core.workplace_user

Procedure

1. Log in to the Employee Center portal.
   For more information, see Workplace services on the Employee Center portal.
2. Select and open the Now Assist in Virtual Agent chat window.
3. Enter your query or key words to reserve a meeting room.

   The Now Assist in Virtual Agent bot supports human-like conversational language. For example, you can query ' 'Reserve a space for me', I want to reserve a space for 10 AM, and so on.
4. After the initial greeting message, the Now Assist in Virtual Agent bot provides an explanation of what you can expect from it.
5. Enter your query or key words to reserve a space.
   A friendly, natural language conversation or utterance can be used while making or submitting your workplace requests.

   While the large language model (LLM) is processing your request (utterance), animated dots in the chat window indicate that the bot is working on your request.
6. The Now Assist in Virtual Agent shows options to reserve a space.

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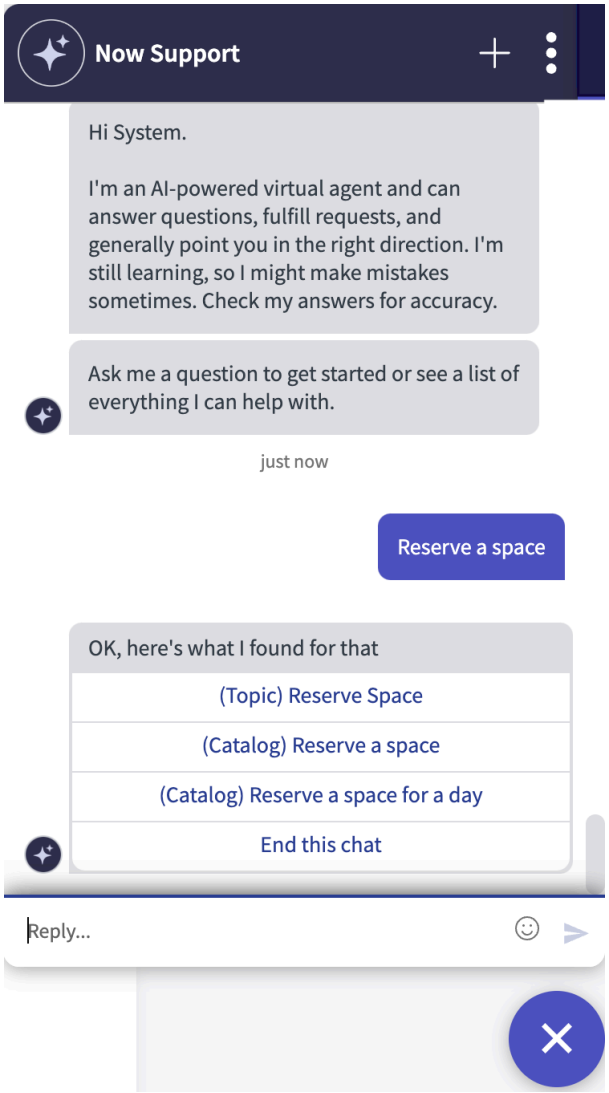

Note: The option to reserve a space using the Now Assist in Virtual Agent is available only if your administrator has added the **Reserve Space** Virtual Agent LLM topic in the Virtual Agent designer. For more information, see Configure Now Assist in Virtual Agent for Workplace Service Delivery

7. Select **(Topic) Reserve Space**.

   When the Topic name button is selected, the workplace requester is launched into that topic flow within the Now Assist in Virtual Agent.

   The application tries to find “keywords” in the sentences that the employee enters. It uses the keywords entered by an employee for reservation requests and shows suggestions for reserving a space step by step. Based on the input provided, the bot tries to get as many data points as possible initially. For example; “I want to reserve a desk for Friday from 9 am till 11 am” are the keywords entered by an employee. The application captures the following data points and shows suggestions:

   - Space type: the system will filter on modules with "space" in it
   - Building AMS-B1, the employee is asked to confirm
   - Start time: 9 am
   - End time: 11 am

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Since, there is no date provided, the employee is asked by the bot to indicate the date.

For example, If the employee enters "I want a space on next Monday from 9 am to 11 am." The building information is not provided in this input, so the bot asks to indicate the building. The Date is calculated based using the input "Next Monday" and start and end time. The more information an employee provides, less inputs are required by the bot to process and create a reservation.

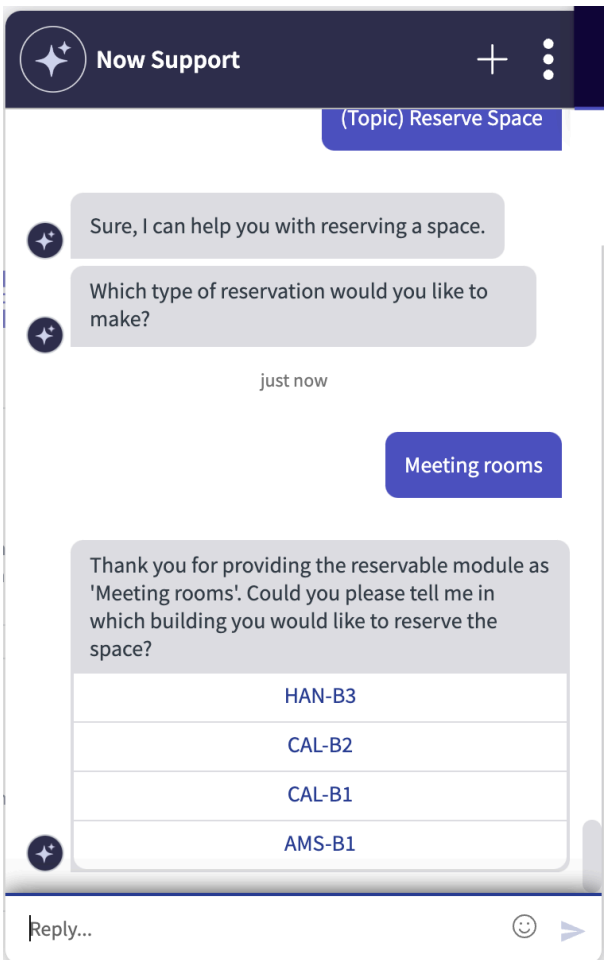
8. The Now Assist in Virtual Agent bot instructs you to select the type of reservation that you want to make.

   For example, select **Meeting rooms.**

   Note: Only the **Browse All** Reservable module configuration is supported by Now Assist in Virtual Agent. It shows all reservation types available in the **Browse All** Reservable module. For example, **Desks**, **Desks within a shift**, and so on.

   The **Specific Unit Selection type** is supported in the Reservable Table configuration. **Container** isn't supported for Now Assist in Virtual Agent. For more information, see Configure a reservable module.

9. The Now Assist in Virtual Agent bot instructs you to select a location for reserving a space.
10. Select a building.
    For example, **Cal-B2**.



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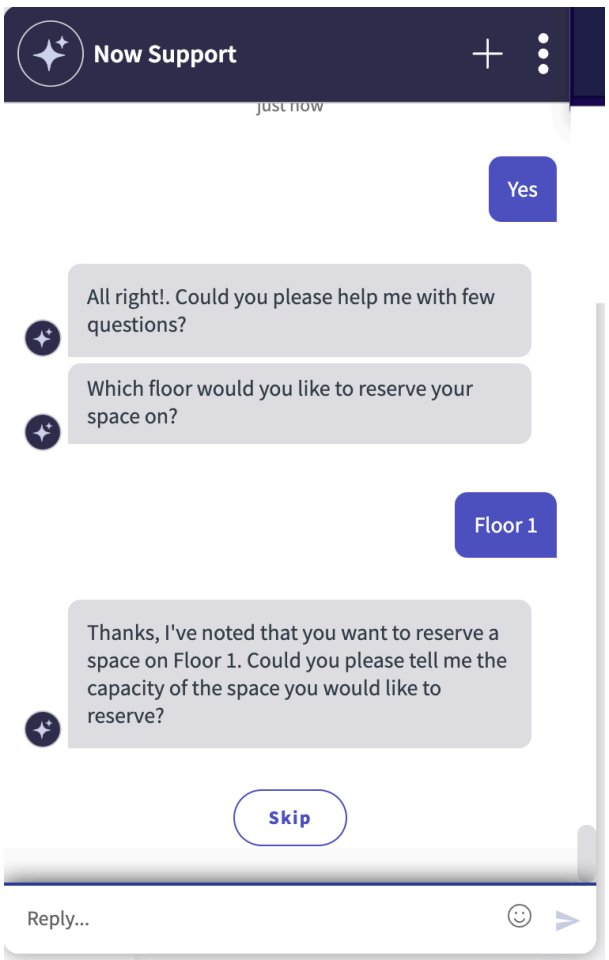
11. Now Assist in Virtual Agent bot instructs you to provide the Start and End dates for the reservation.

> **Note:** Recurring reservation and multi-day reservations are currently not available when you book a meeting room using the bot. Only single reservations for a selected date can be created. Make sure that the Start and end dates should be in the building's time zone and can't be in the past.

12. Now Assist in Virtual Agent bot confirms your selection for a location and reservation dates.
13. Now Assist in Virtual Agent bot instructs you to provide the floor name, capacity, and space name where you want to reserve a meeting room.



> **Note:** Floor, capacity, and shift schedule are optional inputs. If there are no spaces available, the Now Assist in Virtual Agent bot shows the following message, "Sorry, there are no available spaces currently. Please revise your selections and retry". If the suggestions don't match your requirement, you're also given the option to select **None match my preference**. If invalid user inputs are provided, for example, an incorrect building name or a past date, the bot asks you to enter the details again.

The Now Assist in Virtual Agent bot shows location results. The name of the building, floor, and capacity are displayed in the result.

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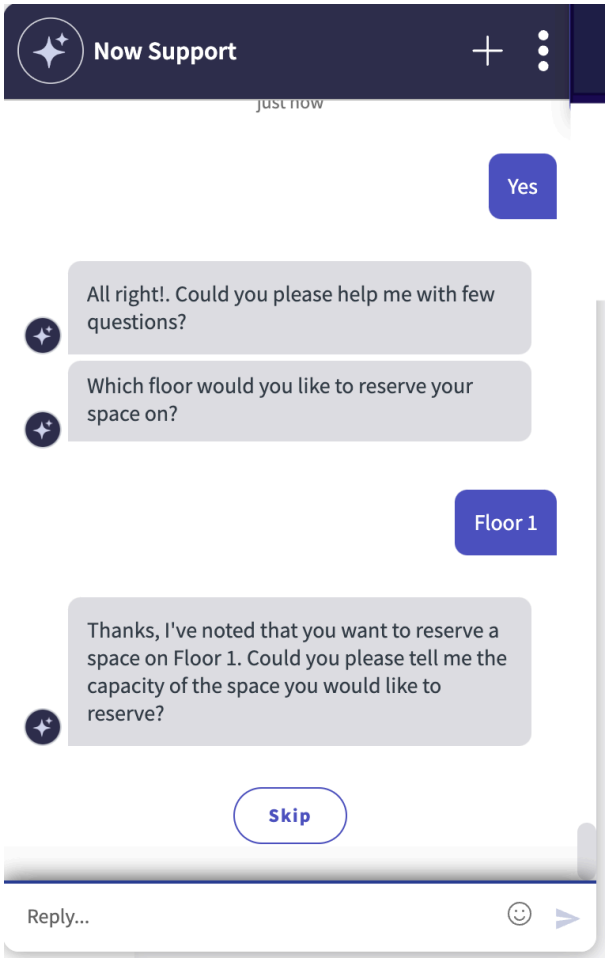

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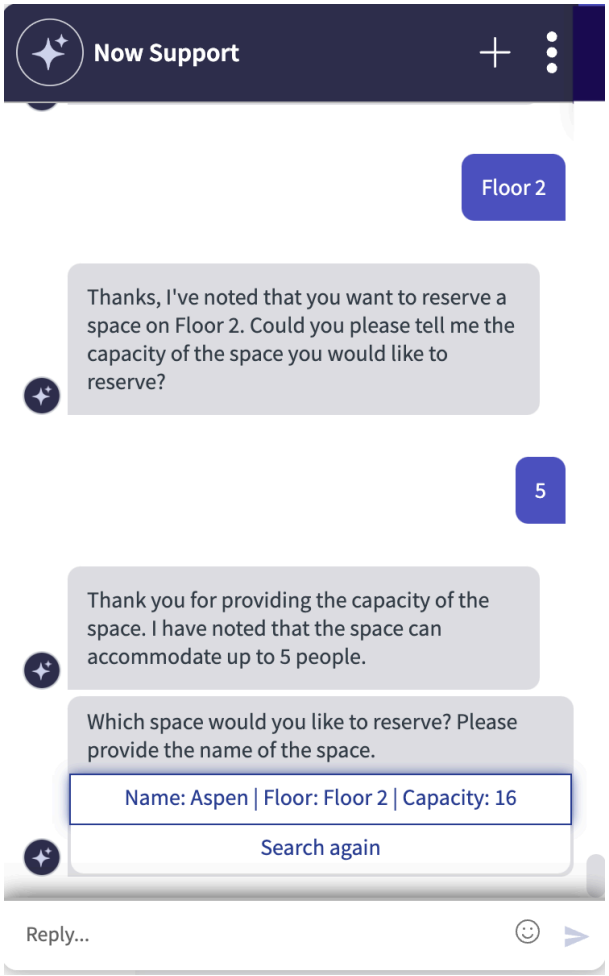

Select a space from the suggestions showed by Now Assist in Virtual Agent.

The Now Assist in Virtual Agent processes the information that you have provided and completes your reservation.

14. To view and update the reservation details, select the link **Please click here to view reservation details.**

    The Reservation summary page appears. On the Reservation summary page, you can edit and update your reservation details.

15. **Optional:** Now Assist in Virtual Agent provides suggestions to add services to your reservation.

    (Optional) You can add guests and external visitors, Zoom virtual meeting link, or Catering services to your reservation. If you don’t want to add any of these services to your reservation, you can skip this step and complete your reservation at this stage.

    Note: The option to add workplace services is shown based on the corresponding service availability for a selected location. For example, if Zoom spoke and the virtual meeting provider is configured in the Reservable module, the Added Zoom service option is shown by the bot. This also depends on the availability of a location or reservable module configuration settings by your administrator. So, if there is no Zoom spoke configured or guests are not allowed to a reservation, the bot doesn't display the related questions or suggestions. For catering services, the application checks if these are assigned for a selected location.

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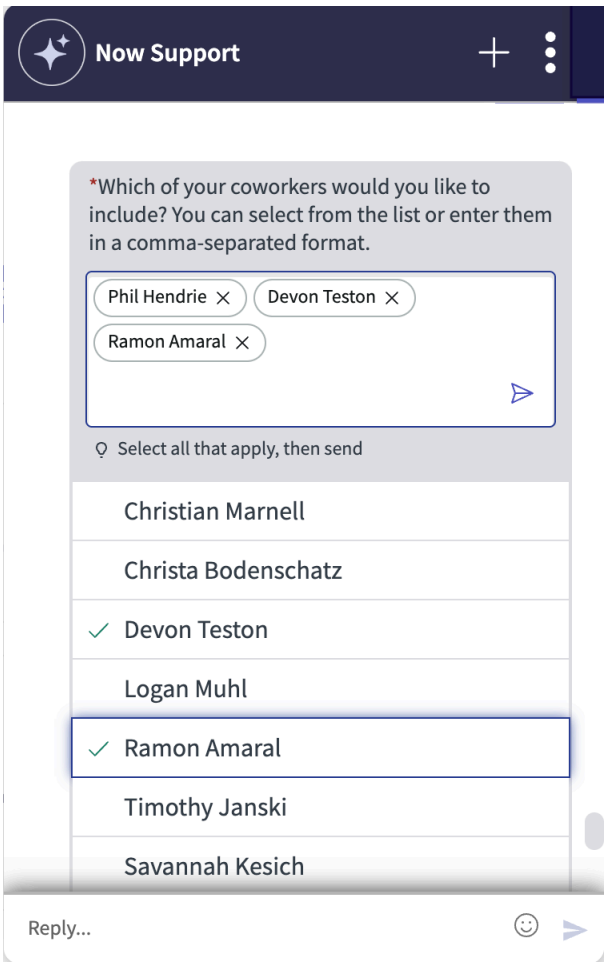
16. **Optional:** Now Assist in Virtual Agent instructs you to invite guests to your reservation.

    Note: The option to add guests is shown only when the **Allow Invitees** configuration is enabled in the Reservation module. This option in the Reservable Module enables you to invite attendees and add them to your reservation. You can invite guests to your reservation. For more information, see Configure a reservable module.

17. **Optional:** Select **Yes** if you want to add guests to your reservation.

    Note: You can add multiple invitees to your reservation. For more information, see Configure Now Assist in Virtual Agent for Workplace Service Delivery. You also need Workplace Visitor Management.

18. Now Assist in Virtual Agent provides suggestions to select your guests.



19. Now Assist in Virtual Agent confirms the guests details that you have provided.
20. Select **Yes** to proceed.
    Select **No** to change or update your selection.
21. **Optional:** After adding guests, you can add additional services like external visitors to your reservation.

    (Optional) You can only add visitors to a reservation for which you're the host. Workplace users with 'sn_wsd_rsv.manager' or 'sn_wsd_rsv.reservation_planner' roles can add invitees to a reservation. Workplace users with 'sn_wsd_core.workplace_user' role can’t add invitees to a reservation when they aren't the host.

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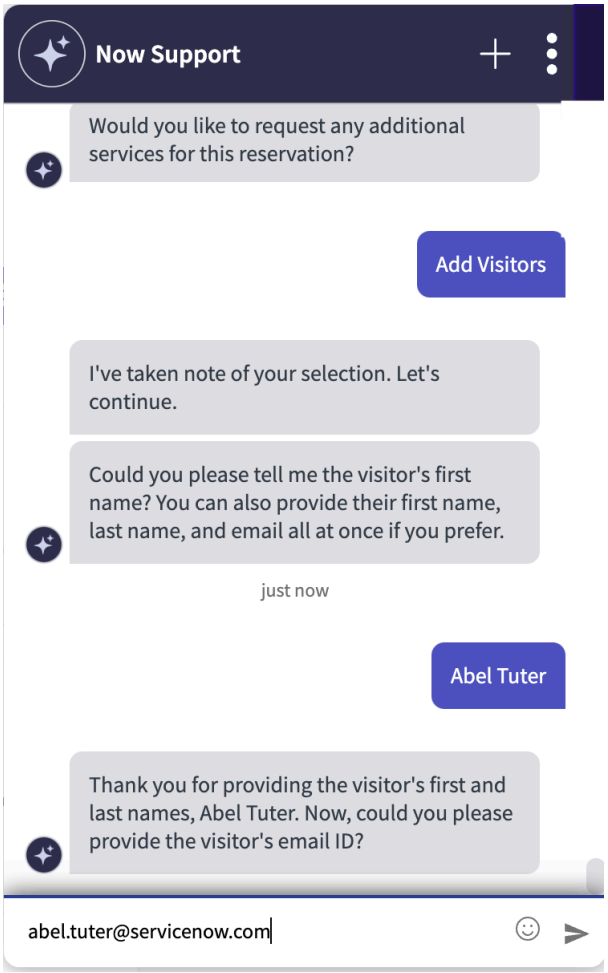

Note: Multiple visitors can't be added all at once. You should add visitors sequentially. For example, if you have visitor A, visitor B, and visitor C. Start by adding visitor A first, and add visitor B, and Visitor C.

a. Now Assist in Virtual Agent instructs you to provide the First Name, Last Name, and Email ID of the external visitor.

(Optional) If a visitor that is already added to a reservation is added again, the bot provides suggestions to add another visitor.

b. Provide the required details.

c. After adding the visitor, Now Assist in Virtual Agent confirms that visitor registration is done.

d. Now Assist in Virtual Agent provides suggestions to add a few more visitors to your reservation.

e. You can select **Skip** to proceed and continue with your reservation.

22. **Optional:** Now Assist in Virtual Agent shows the option to Add Catering services.

Note: The services that you add are default catering workplace services provided with Workplace Reservation Management. It doesn't support any custom catering or workplace services added by you.

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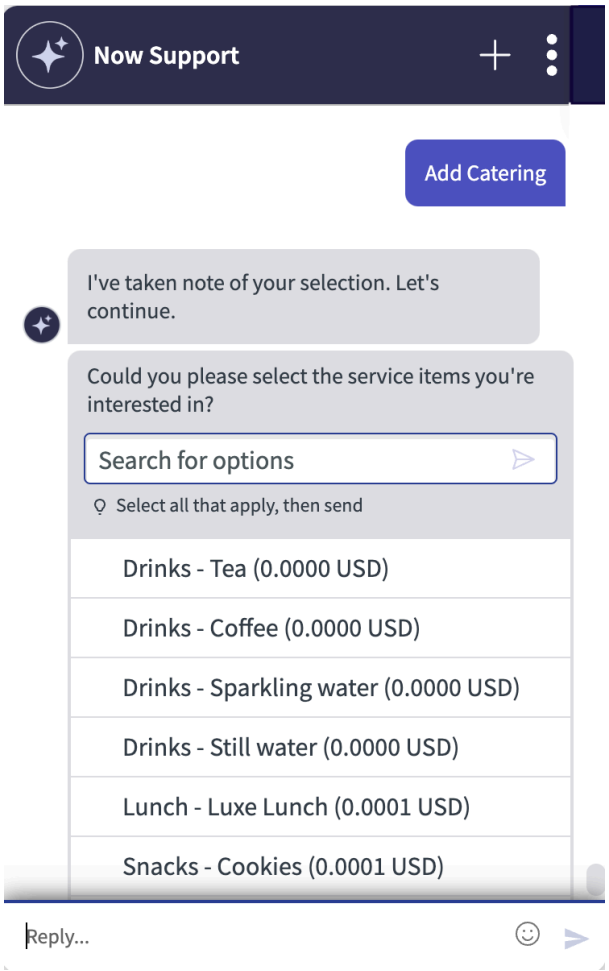
a. Select the required catering services (Lunch, Snacks, Drinks).

(Optional) You can also enter or add a conversational text like "Add lunch, some snacks, and drinks", "Add sparkling water and some snacks, and so on".



Note: When the requested catering service aren't available, a message is shown that the requested catering service isn't available.

b. After selecting a catering option, the bot asks you to specify the quantity.

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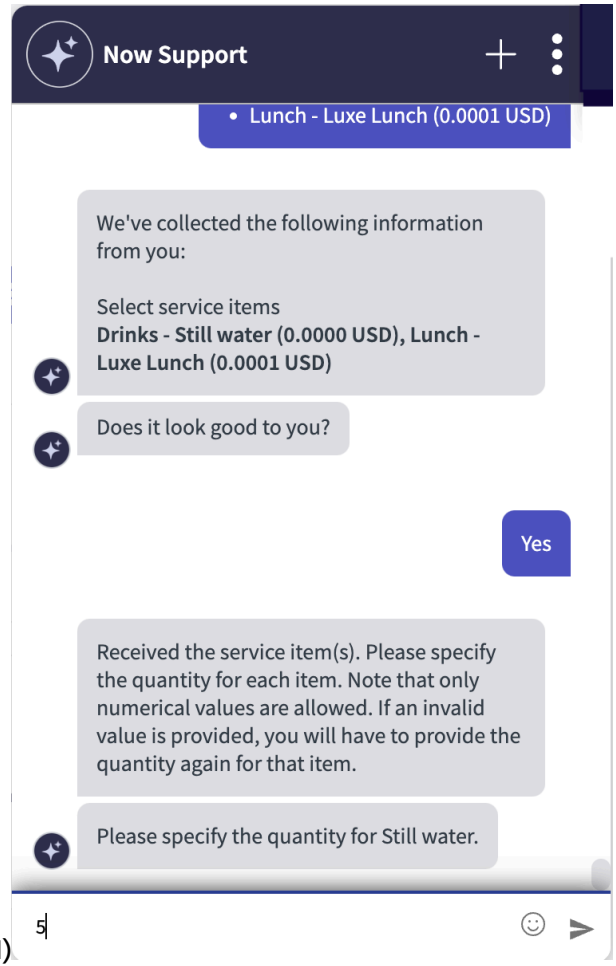

(Optional)

c. The bot asks you to specify the quantity for all the selected catering menu items.

d. After confirming your selection, the bot adds the catering services to your reservation.

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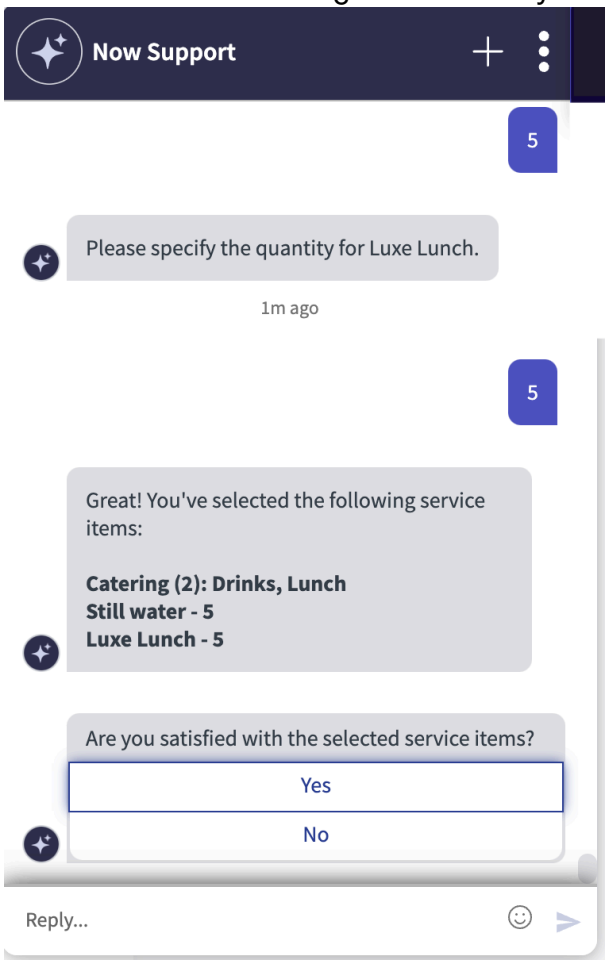
e. The Now Assist in Virtual Agent successfully adds the catering services to your reservation.



23. Optional: Now Assist in Virtual Agent provides prompts to add a zoom meeting link.

(Optional) Make sure that you have the following:

a. For more information, see Configure Now Assist in Virtual Agent for Workplace Service Delivery.

b. Zoom Spoke is configured for Workplace Reservation Management. For more information, see Connect Workplace Reservation Management with Zoom.

24. Now Assist in Virtual Agent shows an acknowledgment message along with the Workplace case task created after adding the Zoom virtual meeting link.

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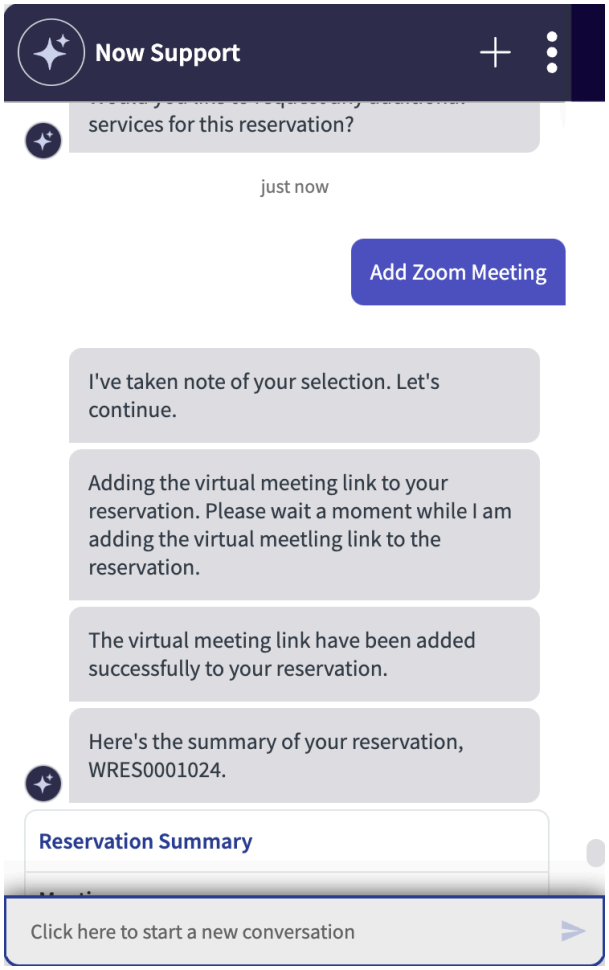

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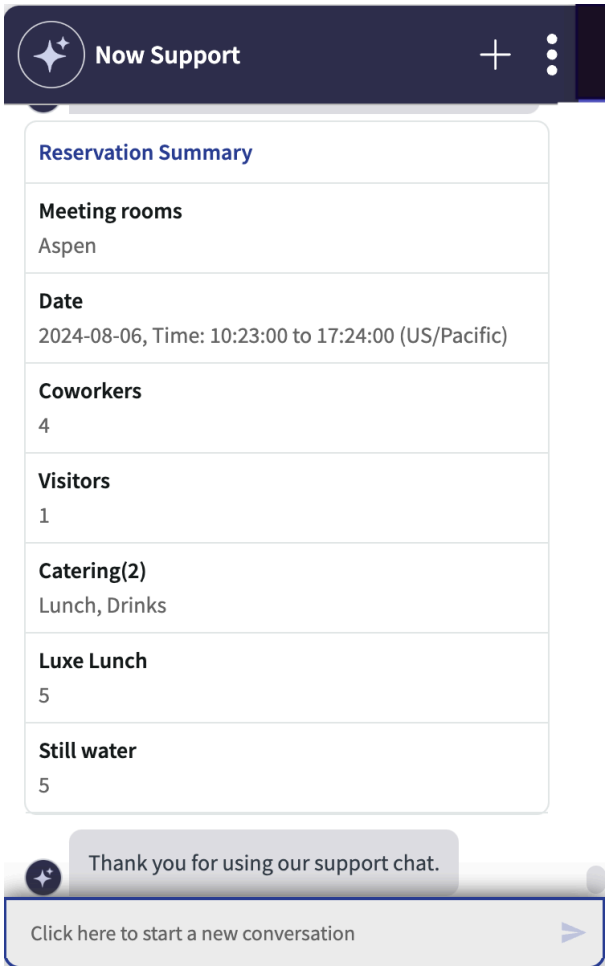
25. The Now Assist in Virtual Agent shows the reservation summary.



Review notifications in the Now Assist panel

Review notifications by AI agents in the Now Assist panel.

Before you begin

Workplace Event Planners can review the notifications and help AI agents take appropriate actions for blocking a space, moving any existing reservations to a new location, or for updating an existing reservation's date, time, or duration.

Role required: now_assist_panel_role, sn_wsd_rsv.reservation_planner, sn_wsd_case.case_writer

Procedure

1. In your instance, select the Now Assist sparkle icon in the ( ) navigation menu bar to open the Now Assist panel.

   Use the Now Assist conversational interface to receive notifications, case summarization, and resolution notes.

2. To review the notifications by AI agents for an emergency maintenance request, select the Now Assist sparkle icon ( ) in the navigation menu bar of your instance.

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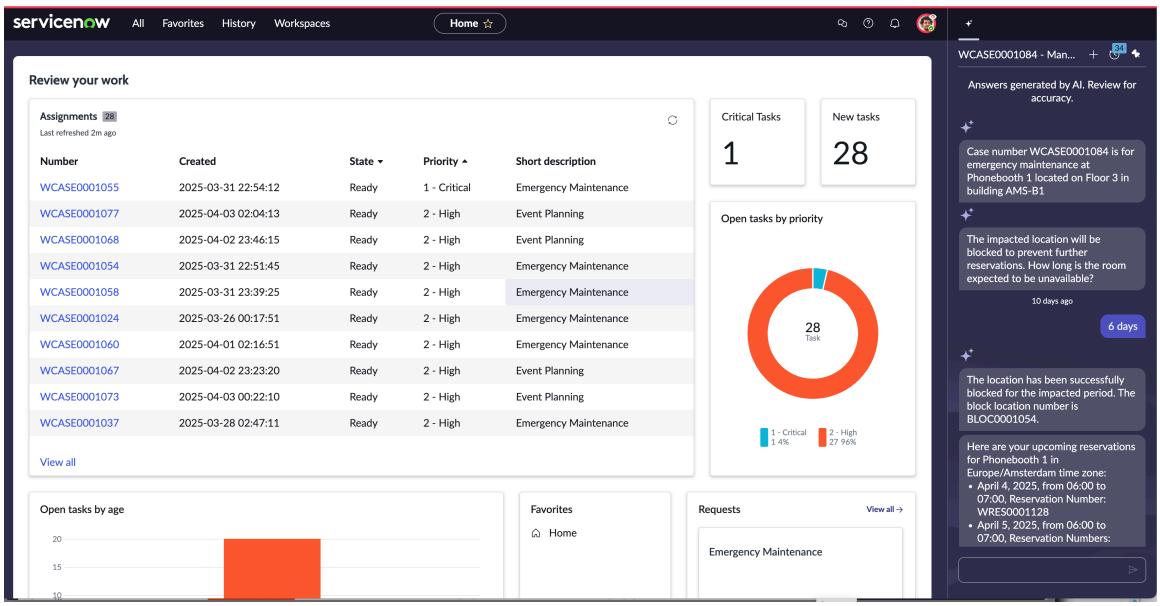
AI agents notifies Workplace Event Planners about actions taken through case resolution and case summarization notes in the conversational interface. Select and open the notifications in the conversation interface to review the case summarization and resolution notes.

For example, an emergency maintenance request is submitted and assigned to a user in the Workplace Event Planners assignment group. When an emergency meeting request is submitted, a workplace case task is created. For more information, see Submit an emergency maintenance request and View emergency maintenance case details.

Workplace Event planners are notified by AI agents for blocking a location and moving an existing reservation from a blocked location to another. AI agents notifies the Workplace Event planner user using the Now Assist panel and performs the following activities in the conversational interface:

- Contacts the Workplace Event planner user and summarizes the issue.
- AI agent asks the Workplace Event Planner the duration for which the space should be blocked (unavailable) during the maintenance period.
- After receiving the confirmation, the AI agents creates a block location record in the sn_wsd_core_block_location table. The location is blocked or unavailable during the emergency maintenance period. It autonomously updates the existing reservation to a new location.



- If there are no impacted reservations for a blocked location, AI agents inform the Workplace Event Planners that there are no impacted reservations for a blocked location.

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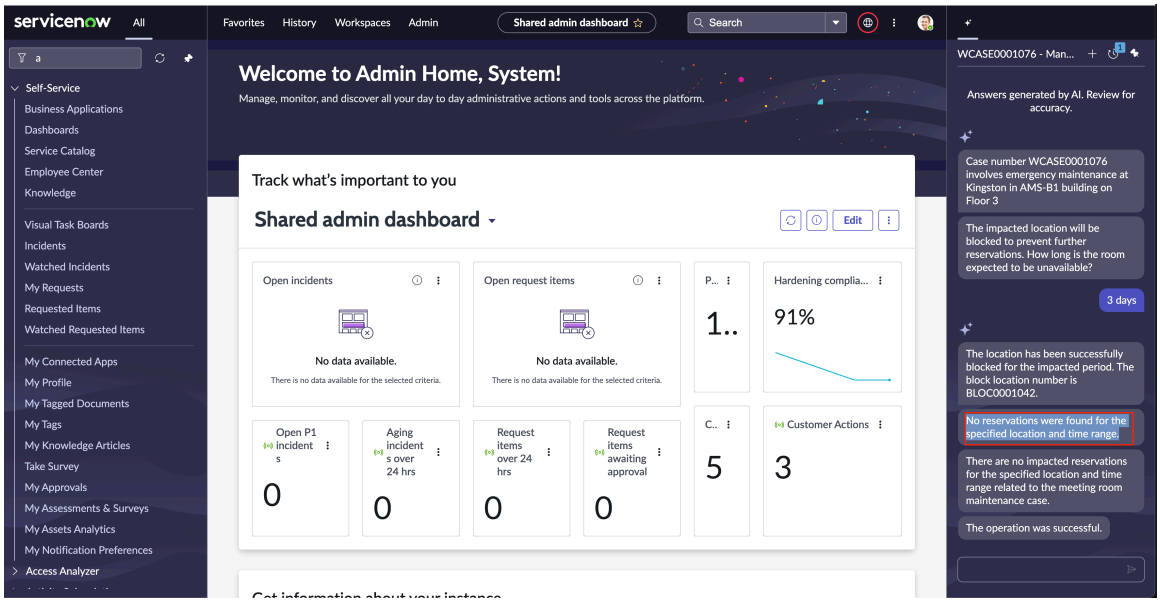
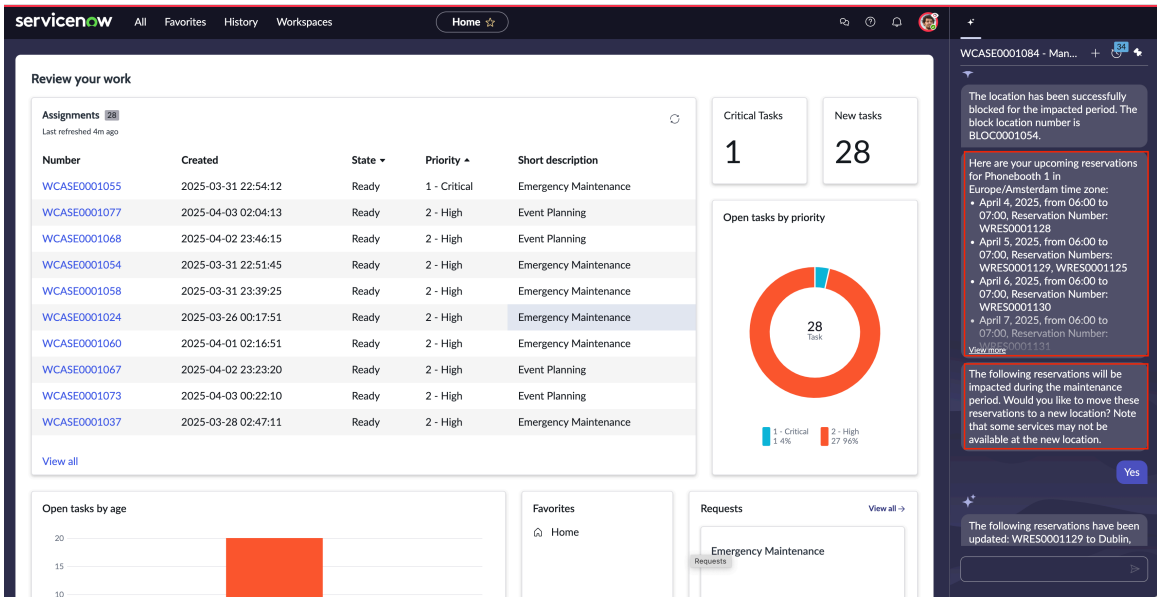


- If there are any existing reservations in the blocked location, AI agents lists the impacted reservation or reservations for Workplace Event Planners to review.
- AI agents asks the Workplace Event planners to confirm the impacted reservations.
- Workplace Event planners can confirm the location and help AI agents move the reservation or reservations to an available location.



- If you want the reservation to be moved to a different location, enter your suggestion in the conversational interface. If the location is available, AI agents block the location for you.
- If AI agents cannot handle an impacted reservation, it provides a link to the Workplace Event planner to manually moving or updating the reservations. Workplace Event Planners can navigate to the reservation portal page and manually update or reschedule the reservations.

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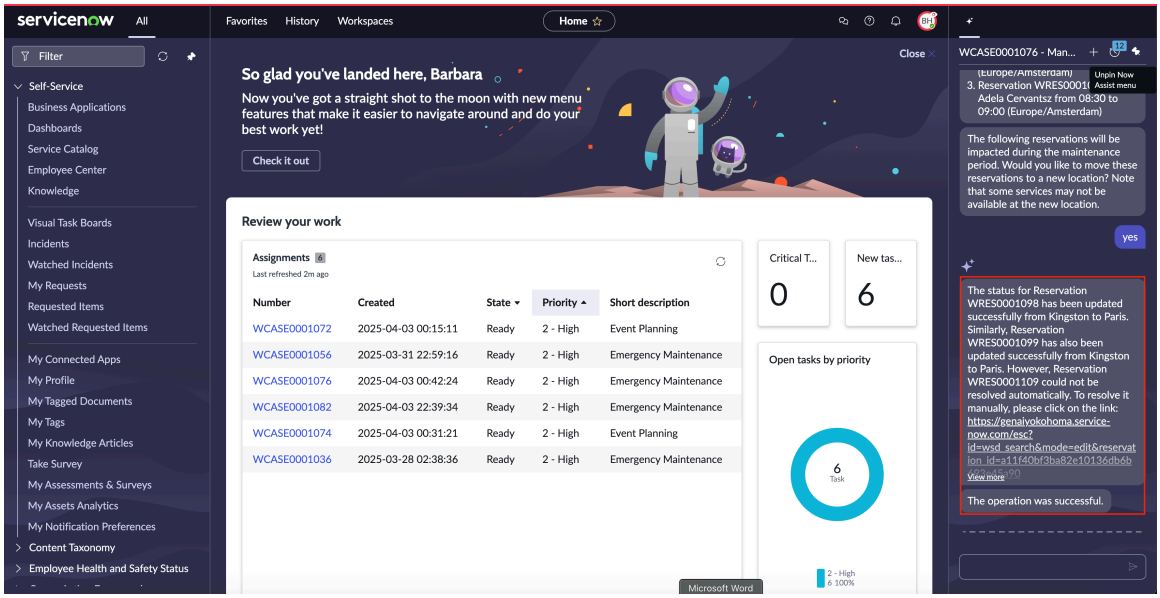

Note: Multi-location reservations are not supported by AI agents.

- AI agents share case summarization and resolution notes with Workplace Event Planners.

The emergency maintenance case activities are also added to the work notes of the emergency maintenance case. Workplace Event planners can review the work notes to understand the activities performed by AI agents. For more information, see View emergency maintenance case details.

Another example can be when a change event request is submitted by a workplace user. The change event request case is submitted to update an existing reservation's date, time, and duration. The change event request case is assigned to a user in the Workplace Event Planners assignment group. AI agentic workflow Help Manage workplace reservations is triggered when the case is assigned to a Workplace Event Planner.

For more information, see Submit a change event request for a reservation and View change event reservation case details.

Select and open the notifications in the conversation interface to review the case summarization and resolution notes.

- Workplace Event planners can review the notification and chat with the AI agent to answer queries for moving a reservation to another location.
- If the old location is available, AI agents move the reservation to the old location when updating an existing reservation's date, time, and duration.

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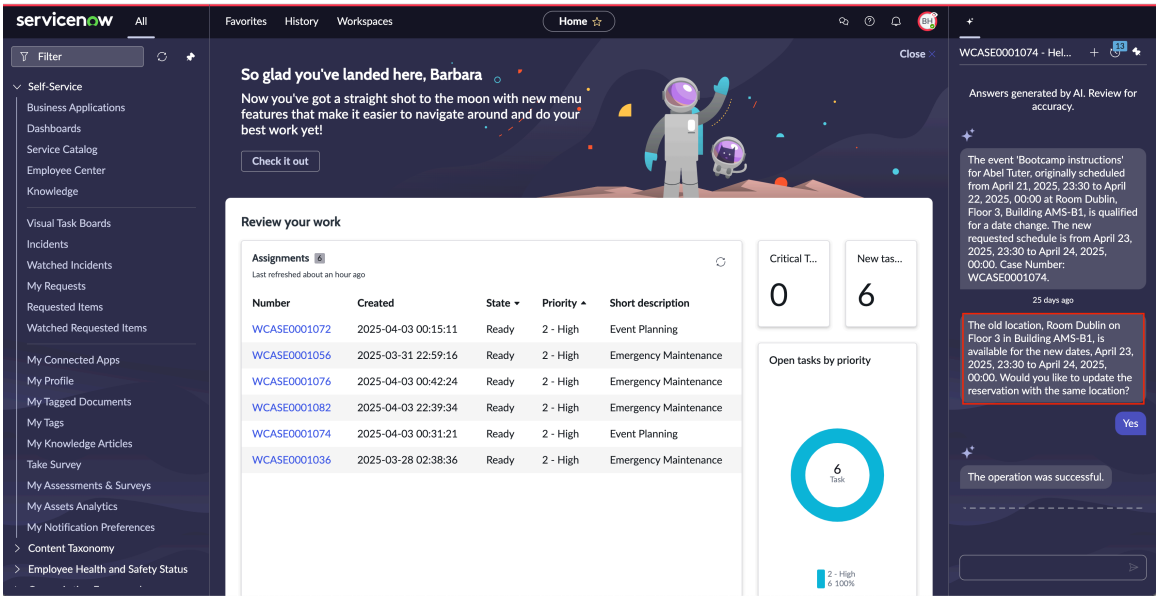
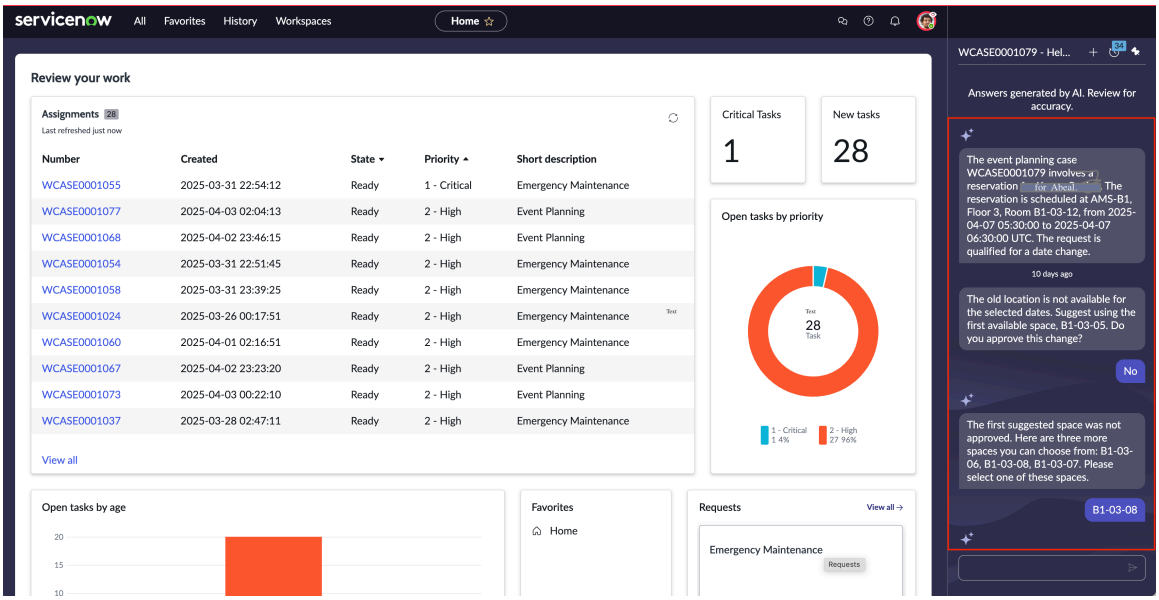


- If the old location is not available while updating a reservation, AI agents shows a new location and asks Workplace Event planners to confirm it. You can confirm the location or ask for a different location that you prefer.



- AI agents then show 3 new available spaces for reservation. You can select any one of these. If you want a different location, AI agents provide a link for you to navigate to the reservation portal page and manually select the space that you want.

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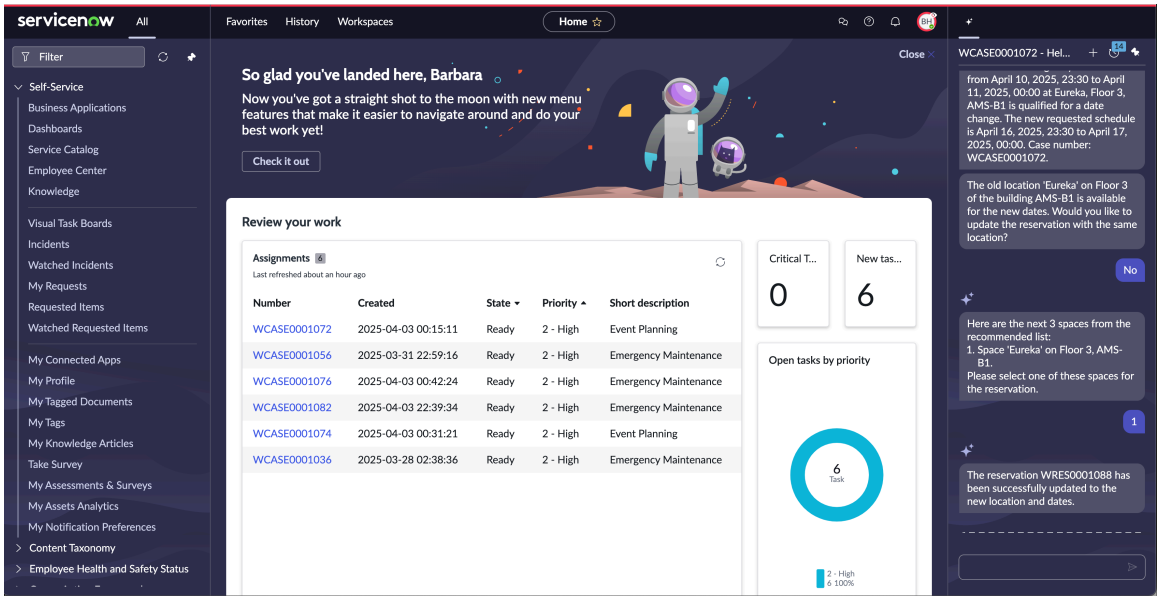

- AI agents then provide case resolution notes and summarization for Workplace Event planners to review.

The team of AI agents updates an existing reservation with a new date, time, or duration. AI agents notifies Workplace Event Planners using the Now Assist panel conversational interface about the changed date and time for a reservation. If the old location is not available for reservation, AI agents move the reservation with updated date and time to a new location. For more information, see Help manage workplace reservations agentic workflow.

Summarize a workplace case using Now Assist for WSD

Use the case summarization skill to summarize the case context and take appropriate action.

Before you begin

Role required: sn_wsd_case.workplace_agent

About this task

As an admin, you can configure the Workplace Case Summarization skill to customize the input fields and output summary. For more information about customizing the skill, see Configure the Workplace Case Summarization Skill.

You can use the case summarization skill in either Core UI or Workplace Central.

- In Core UI, the summary appears in a banner in the case record.
- In Workplace Central, the summary is generated in the **Details** tab.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.
   You can also open Workplace Central from the Employee Center directly. Navigate to **Workspaces** > **Workplace Central**.
   The Workplace Analytics dashboard opens.
2. Select the **Case Management** icon ( ).

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The Case Management dashboard opens.

3. Select a case from the **Overview** section or the **All active cases** section.
   The list view displays the cases as WCASEXXXX for normal workplace cases, WMCXXXX for maintenance cases and WMOVEXXXX for move cases.
   The case details are displayed in a new tab. For more information about the Case details page, see Case Management - Key features, Actions & Case details topic.
4. In the Workplace Case summary by Now Assist component, select **Summarize**.

   Note: Generating the summary may take several seconds.

5. **Optional:** When you finish summarizing a case, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the case work notes	**a.** Select **Share**. **b.** In the **Share to work notes** dialog box, edit the summary. **c.** Select **Save to Work notes**.
Expand or collapse the summary	Select the **Show more** or **Show less** button to see more or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill.
Copy the case summary	Select the copy icon ( ) to use the case summary information for another purpose, such as pasting into an email.
View the information about the case summary	If you want to check some details about the summary, select the more info icon ( ).

Using AI agent workflows in Now Assist for WSD

Agentic workflows in Now Assist for WSD help complete workplace tasks autonomously.

Table 1. Available AI agent workflows for Now Assist for WSD

Agentic AI Workflow Name	Description	Available AI agents
Manage temporary space closures	This team of AI agents come together when there's a meeting room maintenance case that must be looked at with priority.	• Workplace case notes updater • Case Retriever • Reservation resolution processing AI agent

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Table 1. Available AI agent workflows for Now Assist for WSD (continued)

Agentic AI Workflow Name	Description	Available AI agents
	• When the emergency maintenance request is submitted, maintenance work must be performed. • The emergency case is assigned to a user in the Workplace Event Planners assignment group. • The location is blocked by AI agents for maintenance. • If there are any existing reservations in the maintenance workspace, AI agents relocate or move the reservations to an available location. AI agents reduce repetitive tasks for Workplace event planners. They provide assistance and verify that employees have access to functional spaces within an organization during an outage or emergency maintenance. AI Agents handle the work for Workplace Event Planners so that they can focus on more important and complex tasks that require human intervention. For more information, see Manage temporary space closures agentic workflow.	
Help manage workplace reservations	This team of AI agents help Workplace Event Planners and autonomously reschedule events happening in the workplace. AI agents support Workplace Event Planners with all relevant information and preparation work when changes are occurring to a planned reservation. AI Agents gather relevant information and provide suggestions to the Workplace Event planners for the next best possible action. Event	• Reservation updating AI agent • Case Retriever • Reservation analyzing AI agent • Workplace case notes updater

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Table 1. Available AI agent workflows for Now Assist for WSD (continued)

Agentic AI Workflow Name	Description	Available AI agents
	planners can review and optimize reservations as required by looking at the workplace case details. In order to finish the task, AI agents perform the following: • Retrieve the change event edit workplace case details. • Analyze the reservation retrieved from the previous step. • Update Workplace case notes with all the actions taken. For more information, see Help manage workplace reservations agentic workflow.	
Optimize Cleaning activities	This team of AI agents get all open workplace maintenance management cases. The *Workplace Planned Maint Nightly Run* scheduled job runs on a daily or hourly basis to create maintenance cases. Each workplace maintenance case represents a cleaning or a maintenance case on a location for a certain time interval, also known as schedule (on a daily or hourly basis). The Optimize cleaning activities agentic AI workflow retrieves space utilization threshold for each workplace maintenance cases. Based on the space utilization threshold data, it creates new maintenance cases or deactivates underutilized maintenance cases. For more information, see Optimize cleaning activities agentic workflow.	• Case aggregator AI agent • Utilization rate AI agent • Case optimizer AI agent
Automate map updates	The AI agent helps map admins configure the map	Map Admin Agent

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Table 1. Available AI agent workflows for Now Assist for WSD (continued)

Agentic AI Workflow Name	Description	Available AI agents
	during bulk updates to Indoor Mapping. The AI agent autonomously retrieves sources for the CAD file and resumes the import task. If the source isn't found, the AI agent moves the task to the `Waiting user input` state. For more information, see Automate map updates agentic workflow.	

Important: All use case and AI agent records are read only by default.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and complete the following steps:

- Activate the use case.
- Activate all agents within the use case.
- Activate the trigger to invoke the use case automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Manage temporary space closures agentic workflow

This team of AI agents temporarily block a location when there's an emergency workplace maintenance case is submitted.

Manage temporary space closures workflow overview

AI agent executes maintenance tasks, blocks a room for maintenance, and moves any existing reservation to another location when the emergency workplace maintenance requested is assigned to a user in the Workplace Event Planners assignment group. For more information, see Submit an emergency maintenance request.

The team of AI agents block a room for emergency maintenance and move any existing reservations from the blocked location to another location. Multi-building and group reservations are also handled by the agents. AI agents send notification to Workplace Event planners using the Now Assist panel. The team of AI agents autonomously perform the following:

- Retrieves the case details from the emergency maintenance request.

  For more information, see View emergency maintenance case details.

- Retrieves impacted reservation from a location and blocks a location for maintenance.

  For more information, see Block a workplace location.

- AI agents notifies workplace event planners with case resolution and summarization using the Now Assist panel conversational interface.

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AI agents take confirmation from Workplace planners before blocking a location or before moving a reservation to another location. Workplace Event planners can respond to AI agents queries using the conversational interface of the Now Assist panel. For more information, see Review notifications in the Now Assist panel.

- Updates the emergency maintenance request case notes with all the actions taken. Workplace Event planners can review the activity log to know the actions taken by AI agents.

  For more information, see View emergency maintenance case details.

Manage temporary space closures workflow

To access the Maintenance Meeting rooms workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview** > **Manage Temporary space closures**. For more information, see AI agents used in the Manage temporary space closures workflow.

   The Manage temporary space closure Describe and Connect workflow opens.

2. Select **Define Trigger** to review the trigger factor (Emergency Meeting rooms) for this agentic workflow. For more information, see Triggers for the Manage temporary space closures.
3. The **Select Display** option enables the Now Assist panel. For more information, see Select display.

AI agents used in the Manage temporary space closures workflow

The **Connect AI agents** section in the Describe and Connect workflow displays the AI Agents that are working on the Manage temporary space closure workflow.

The following agents are used to Manage temporary space closures workflow:

Connect AI agents

AI agent Name	Description	AI agent tools and resources
Workplace Case notes	Workplace case notes updater	Workplace case notes update
Case Retriever	Case Retriever	• Get meeting room maintenance case details. • Get details of change event case details. .
Reservation resolution processing AI agent	Reservation resolution processing AI Agent	• Auto-resolution for all the reservations. • Fetch Reservations for a location and time range,Block location

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Triggers for the Manage temporary space closures

When an emergency maintenance request is assigned to a user in the Workplace Event Planners group, AI agentic workflow Manage temporary space closures is triggered. In the Define trigger workflow, the agentic workflow begins executing when the trigger meets the following conditions:

Existing Triggers

Field	Description
Name	Emergency maintenance case
Trigger	Created or updated An emergency maintenance case is submitted and a workplace case is created. When the workplace case is assigned to Workplace Event planners, AI agentic**Manage temporary space closures** workflow is triggered.
Table	Workplace Case [sn_wsd_case_workplace_case]
Conditions	[Assigned to] [is not empty][Workplace service] is [Emergency maintenance]
Run as	assigned_to
Channel	Now Assist panel
Status	Active **Note:** When the status is Active, the AI agent is triggered autonomously.

Select display

In the Select display workflow, select **Display** to display the Now Assist panel. Workplace users with the now_assist_panel_role receive notifications for the triggered use case output. When the Now Assist panel option is enabled, the AI agent output or notifications are displayed in the Now Assist panel.

Note: To view the output from a triggered use case, you should have the now_assist_panel_role.

Select this option to receive and review notifications send by AI agents in the Now Assist panel. AI agents send notifications to Workplace Event planners in the Now Assist panel with the case resolution and summarization notes. It asks for Workplace Event planners confirmation before blocking a location and moving any impacted reservations to another available workspace or before updating an existing reservation's date, time, and duration. For more information, see Review notifications in the Now Assist panel.

Related topics

- Now Assist AI agents
- Install Now Assist AI agents
- AI Agent Studio

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Help manage workplace reservations agentic workflow

The Help manage workplace reservations agentic AI workflow enables Workplace Event Planners with rescheduling a planned reservation. AI Agents gather relevant information from a workplace reservation and update an existing planned reservation with a new date, time, and duration.

AI agents retrieve the reservation from the change event reservation case details. AI agents analyze an existing reservation before updating it with a new date and time. If the old location is not available while updating an existing reservation, AI agents update and move the reservation to a new location. For more information, see Submit a change event request for a reservation.

A change event request is submitted for updating an existing reservation by a workplace user. A workplace case is created with a new workplace service. The workplace case is assigned to a user in the Workplace Event planners assignment group.

The team of AI agents autonomously perform the following:

- Retrieve the change event request workplace case details when it assigned to a Workplace Event planner.
- Analyze the reservation retrieved from the previous step. If the old location is available while updating a reservation's date, time, and duration, AI agents update the reservation. If the old location is not available for reservation, AI agents move the reservation to a new location while updating the reservation date, time, and duration.
- Send notification to Workplace Event planners using the Now Assist panel conversational interface.

  Workplace Event planners can respond to AI agents queries using the conversational interface of the Now Assist panel. AI agents take confirmation from Workplace planners before updating a reservation to another location if the old location is not available. It shows three workplace locations. You can select the location or ask the AI agents to show more locations. AI agent provide a link for you to click and navigate to the reservation page to manually select a location of your choice.

  For more information, see Review notifications in the Now Assist panel.
- Update the change event request case work notes with all the actions taken. Workplace Event planners can review the activity log to see the actions taken by AI agents to update a planned reservation event.

  For more information, see View change event reservation case details.

For more information, see View change event reservation case details.

Help manage workplace reservations

To access the Help manage workflow reservations:

1. Navigate to **All** > **AI Agent Studio** > **Overview** > **Help manage workplace reservations.**.

   The Describe and Connect workflow is displayed. For more information, see AI agents used in the Help manage workplace reservations.
2. Select **Define Trigger** to review the trigger factor (Emergency Meeting rooms) for this agentic workflow. For more information, see Triggers for Help manage workplace reservations
3. The **Select Display** option enables the Now Assist panel. For more information, see Select display.

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AI agents used in the Help manage workplace reservations

The **Connect AI agents** section in the Describe and Connect workflow displays the AI Agents that are working on the Help manage workplace reservations workflow.

The following agents are used in the Manage temporary space closures workflow:

Connect AI agents

AI agent Name	Description	AI agent tools and resourcesR
Reservation updating AI agent	Reservation updating AI agent	Update the reservation.
Case Retriever	Case Retriever	Get details of change event case details.
Reservation analyzing AI agent	Reservation analyzing AI agent	Get edit link of reservation and alternate space recommendations.
Workplace case notes updater	Workplace case notes updater.	Workplace case notes updated for a workplace case created for a change event request.

Triggers for Help manage workplace reservations

In the Define trigger workflow, the agentic workflow begins executing when the trigger meets the following conditions:

Existing Triggers

Field	Description
Name	Reservation date change
Trigger	Created or updated A Change Event request is submitted and a workplace case is created. When the workplace case is assigned to Workplace Event planners, AI agentic**Help manage workplace reservations** workflow is triggered.
Table	Workplace Case [sn_wsd_case_workplace_case]
Conditions	[Assigned to] [is not empty][Workplace service] is [Event Planning]
Run as	assigned_to
Channel	Now Assist panel
Status	Active **Note:** When the status is Active, the AI agent is triggered autonomously.

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Select display

In the Select display workflow, select **Display** to display the Now Assist panel. Workplace users with the now_assist_panel_role receive notifications for the triggered case. When the Now Assist panel option is enabled, the AI agent output or notifications are displayed in the Now Assist panel.

Note: To view the output from a triggered use case, you should have the now_assist_panel_role.

Select this option to receive and review notifications by AI agents in the Now Assist panel. AI agents notify Event planners in the Now Assist panel with the case resolution and summarization notes. For more information, see Review notifications in the Now Assist panel.

Related topics

Now Assist AI agents

Install Now Assist AI agents

AI Agent Studio

Optimize cleaning activities agent overview

The Optimize cleaning activities agent performs cleaning activities on a workplace location based on the space utilization threshold data.

This team of AI agents get all open workplace maintenance management cases. The *`Workplace Planned Maint Nightly Run`* scheduled job runs on a daily or hourly basis to create maintenance cases. Each workplace maintenance case represents a cleaning or a maintenance case on a location for a certain time interval, also known as schedule (on a daily or hourly basis). The Optimize cleaning activities agentic AI workflow retrieves space utilization threshold for each workplace maintenance cases.

Note: Optimize Cleaning Activities Agentic workflow optimizes a space at the floor level for a selected building. It only optimizes non-reservable spaces like restrooms and so on.

For more information about how to create maintenance management plan records, see Create and publish maintenance plans.

- The Optimize cleaning activities agentic AI workflow is triggered when the *`Optimize cleaning activities`* scheduled job is executed. The Optimize cleaning activities AI agent optimizes a maintenance plan record and gets space utilization data using the following Workplace Maintenance Management properties.

  For more information, see Components installed with Workplace Maintenance Management

  - The *`sn_wsd_maintenance.optimise_plans`* property helps in optimizing a maintenance plan for a selected floor. To optimize a maintenance plan, workplace maintenance managers should copy the sys_id from the maintenance plan URL. For example, <https://<instance_name>.service-now.com/now/workplace-management/maintenance-plan/ 59e13dbc3b27ee5090fd390f23e45a68. You can also copy the sys_id of a maintenance plan record by navigating to the Additional actions icon (☰) and select **Copy sys_id**.

    Here, 59e13dbc3b27ee5090fd390f23e45a68 is the sys_id of a maintenance plan record.

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> **Note:** Workplace Maintenance managers should manually copy the sys_id of a maintenance plan record. This is a required step to optimize cleaning activities on a floor in a building. The AI agents perform space optimization on the floor of a selected building.

  - After manually copying the maintenance plan sys_id, run the Optimize cleaning activities scheduled job. This schedule job triggers the agentic AI workflow for optimizing cleaning activities on a floor of a selected building. The space optimization for location is done in the UTC time zone.
  - The **Case Aggregator AI Agent** fetches all open maintenance cases based on the maintenance plan Id. It fetches cases that are either in **Draft**, **Ready**, or **Awaiting Approval** state in the system for about 48 hours (two days).
- **Utilization rate AI agent** takes a list of available maintenance cases and calculates the utilization rate for each case. The utilization rate calculator calculates the utilization threshold for a floor in a building. The utilization rate calculator calculates the space optimization. It considers the available reservations and visitor registration for a selected floor in a building.
- (Optional) Workplace Maintenance Managers can navigate to the context menu in an instance and enter **sn_aia_execution_plan.list** in the Filter search box to open the Execution Plans table. This table showcases workplace agentic AI workflow execution status. Review the maintenance cases that are executed by the Optimize cleaning activities agentic AI workflow.
  - Select an optimized cleaning activity agentic workflow.
  - Select the **Tools Execution** tab to review the execution tools and execution status.
  - A tag is added to the maintenance case after it's optimized for the first time.

    The tag is added as an identifier to showcase that a selected maintenance case is processed for space optimization. It isn't picked up again by the agentic AI workflow for processing. When a case is updated and processed again, the sys_id of existing tags and the case is not tagged again. The sys_id of the tag is used to identify processed maintenance cases from the non-processed maintenance cases.
- The **Case optimizer AI agent** analyzes cases grouped by location, schedule type, and date to optimize resource utilization. It confirms that maintenance cases stay within the defined utilization thresholds by creating new cases when the utilization rate is too high and deactivating underutilized cases.
  - Retrieves the utilization thresholds.
  - The *sn_wsd_maintenance.optmise_cleaning_min_utilisation_threshold* property analyzes the minimum space utilization threshold. The default value is 40. If the utilization for a workplace maintenance case is below this range, it's deactivated. It's deactivated when it meets all the deactivation criteria.

    > **Note:** For example, if a floor has only 1 reservation for a day, then, only 10% of space is optimized for a selected floor. This range falls below the minimum threshold utilization range of 40. The maintenance case in this case is deactivated. The deactivation of a maintenance case also depends on the interval time of a scheduled job. For example, if the schedule job is scheduled to run daily, the maintenance cases that are showing low space optimization are removed or deactivated by the agentic AI workflow. However, if a scheduled job is scheduled to run on an hourly basis, all maintenance cases showing minimum threshold value are removed or deactivated except one. The system retains one underutilized maintenance case before deactivating all other maintenance cases that are scheduled to run on an hourly basis. When cases get deactivated, the status changes to **Closed complete** in the Workplace Maintenance cases table.

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- The *sn_wsd_maintenance.optmise_cleaning_max_utilisation_threshold* property analyzes the maximum utilization threshold for a maintenance case. The default value is 80. If the utilization for a workplace maintenance plan case falls within this range or is higher than this range, a new maintenance case is added by the Optimize Cleaning Activities agentic AI workflow. A new case is added so that the optimized cleaning activities are handled using a single maintenance case. A new maintenance case can process it efficiently.

Optimize cleaning activities agentic workflow

This team of workplace agents can find open maintenance cases and optimize it for workplace maintenance activities. These agents can optimize a maintenance case based on the utilization rate of a location for which a maintenance case is created.

Optimize cleaning activities agentic workflow overview

This AI agentic workflow enables Workplace teams to schedule and manage cleaning and other maintenance schedules based on space utilization and optimization. This agentic AI retrieves employee reservation data and visitor registration planned for a specific office location and date. It checks the minimum and maximum space utilization threshold to see if cleaning requests are required. It deactivates the cases when a location shows a minimum utilization threshold value (below 40). The agents optimize the cleaning schedule based on how workplace employees plan to use a space or location. It checks space wastage to provide the optimum workplace experience to employees. For more information, see Optimize cleaning activities agent overview.

AI agents used in optimize cleaning activities workflow

Navigate to **All** > **AI Agent Studio** > **Overview**. Select **Optimize cleaning activities** from the list of available agentic AI workflows. The team of agents optimize a location based on the space utilization threshold. This team of agents fetch open maintenance cases and optimize it based on the utilization threshold rate. The optimization is done on the floor of a selected building autonomously by the agents and it doesn't require any approvals needed from a workplace user.

Note: Workplace Maintenance Managers (sn_wsd_maintenance.manager) and Workplace Maintenance Administrators (sn_wsd_maintenance.admin) can configure this agentic AI workflow.

Optimize Cleaning activities AI agents

AI agent Name	Description
Case aggregator AI agent	This agent fetches all the open maintenance cases based on the maintenance plan ID. Each workplace maintenance case represents a cleaning or a maintenance case for a location for a scheduled interval. The optimization is done on a floor of a selected building. It fetches all the maintenance plan records that satisfy certain criteria. For example, it fetches a set of maintenance plans, and looks for cases that are open for the next 48 hours. The state of the cases should be in **Draft**, **Ready**, or **Awaiting for approval**. For

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Optimize Cleaning activities AI agents (continued)

AI agent Name	Description
	more information, see Create and publish maintenance plans. This agent also considers workplace reservations on a floor. If a case is opened for washroom maintenance, the agent identifies the floor on which the washroom is located. It also considers the number of workplace reservations, visitor registrations, and permanent seat assignments before retrieving the space optimization threshold value.
Utilization rate AI agent	This agent can take a list of available maintenance cases to calculate the utilization rate for each case. This utilization rate is used to optimize the cases. It uses the Utilization rate calculator to calculate the utilization rate.
Case Optimizer AI agent	The Case Utilization Optimizer analyzes cases grouped by location, schedule type, and date to optimize resource utilization. It confirms cases stay within defined utilization thresholds by creating cases when utilization is too high and deactivating underutilized cases.

Case Optimizer AI Agent

The Case Optimizer AI Agent analyzes cases grouped by location, schedule type, and date to optimize resource utilization. It verifies that maintenance cases stay within the defined utilization thresholds. It creates maintenance cases when the utilization threshold is too high. When the utilization threshold is low, it deactivates the maintenance cases for underutilized floors. While deactivating a maintenance case, this agent ensures minimum case availability for each maintenance schedule group. It retains at least one maintenance case before deactivating all underutilized maintenance cases. The output from the Utilization rate AI agent is given as input to this agent for space optimization.

Case Aggregator AI Agent

This agent gets all open maintenance cases based on the maintenance plan Id. Each workplace maintenance case represents a cleaning or a maintenance case on a location for a certain time interval, also known as schedule. This agent fetches the open maintenance cases (maintenance plan record IDs) in the maintenance management system.

Utilization rate AI Agent

This agent can take a list of maintenance cases available and calculate the utilization rate of each case. This utilization rate is used to optimize the cases. This agent takes a list of maintenance cases as input and calculates the utilization rate for locations for a given schedule.

Automate map updates agentic workflow

This AI agent helps map admins configure the map during bulk updates to Indoor Mapping.

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Automate map updates workflow overview

The AI agent autonomously retrieves sources for the CAD file and resumes the import task. If the source isn't found, the AI agent moves the task to the `Waiting user input` state. For more information about import tasks, see Work on an import task.

The AI agent autonomously performs the following:

- Retrieves all the sources for the uploaded CAD.
- Sets the CAD source on the Import Task and resumes the task.
- Moves the task to the `Waiting user input` state if the source isn't found.

Automate map updates workflow

To access the Automate map updates workflow, follow these steps:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Automate map updates**.
3. Select **Define trigger** to review the trigger factors for this agentic workflow.
4. The **Display** option enables the Now Assist panel. For more information, see Select display.

AI agents used in the Automate map updates workflow

The **Connect AI agents** section in the Describe and Connect workflow displays the AI Agents that are working on the Automate map updates workflow.

The following agents are used in the Automate map updates workflow:

Connect AI agents

AI agent Name	Description
Map Admin Agent	This agent handles anything related to Indoor Mapping configuration.

Select display

In the Select a UI display section, select **Display** to display the Now Assist panel. Workplace users with the now_assist_panel_role receive notifications for the triggered use case output. When the Now Assist panel option is enabled, the AI agent output or notifications are displayed in the Now Assist panel.

Note: To view the output from a triggered use case, you should have the now_assist_panel_role.

Select this option to receive and review notifications sent by AI agents in the Now Assist panel. AI agents send notifications to Map Admins in the Now Assist panel about updates to the import tasks.

Related topics

Now Assist AI agents

Install Now Assist AI agents

AI Agent Studio

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Workplace Advisor Overview

Workplace Advisor is an AI-powered solution designed to help Space Planners and Facilities Managers optimize workplace management through intelligent insights and conversational support.

The Minimum Viable Product (MVP) version focuses on two primary capabilities:

Natural Language Q&A via Now Assist Panel

Ask workplace reservation related questions in natural language and receive contextual responses in Now Assist panel. Examples of queries include:

- Reservation details
- Meeting durations
- Reservation check-in details

Insight Cards on Workplace Central Dashboard

The system generates Insight Cards for key performance indicators on workplace operations such as occupancy, space utilization, reservation trends, and environmental metrics.

Workplace advisor QnA agentic workflow

The workplace advisor QnA agentic workflow enables Reservation Managers to use the Now Assist panel to ask natural language questions about workplace reservations.

The workplace advisor QnA agentic workflow routes employee queries to agents and uses a Knowledge Graph to provide automated responses. It supports workplace reservation queries such as bookings, meeting durations, check-in details, and more.

Workplace advisor QnA agentic workflow overview

Important:

To run the workplace advisor QnA agentic workflow, ensure that you have completed the following configurations:

- Enable Now Assist panel
- Configure Now Assist Panel Platform Agent

Accessing the workplace advisor QnA agentic workflow from the AI Agent Studio

You can access the agentic workflow from the AI Agent Studio when you have the sn_aia.admin role.

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Workplace Advisor QnA**.

AI agents used in the workplace advisor QnA agentic workflow

The following table lists the agents that are part of the workplace advisor QnA agentic workflow.

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AI agents in the workplace advisor QnA agentic workflow

Agent	Description	Agent tools
Workplace reservation QnA agent	The workplace reservation QnA agent handles queries related to workplace reservations using a Knowledge Graph. It can answer questions about reservations for a given building, floor, or campus, and other reservable spaces.	Workplace Reservation Graph

Using Now Assist for workplace queries

Use the Now Assist panel to interact with intelligent QnA agents that respond to workplace-related queries using structured data from a Knowledge Graph.

Before you begin

Role required: sn_wsd_rsv.manager

About this task

When you submit a query in the Now Assist panel, the system automatically determines the query type and routes it to the appropriate domain-specific AI agent. If a query involves reservation data, the system routes the questions to the workplace reservation QnA agent.

Procedure

1. Navigate to the Next Experience Unified Navigation page.
2. Select the Now Assist icon .
3. Enter your reservation-related query.

Workplace Advisor QnA examples

You can interact with the Now Assist panel to retrieve workplace-related information.

The following are some sample queries used to retrieve reservation details:

Room Reservations

Show me the reservations for the Galaxy Room tomorrow.

Reservation Insights

How many no-shows were there for recurring reservations last month in Building AMS?

Recurring Reservations

Are there any recurring reservations this week in CAL-B2?

Limitations

Workplace Advisor QnA has the following limitations:

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- Queries that use aggregate operations, such as Get a count of all reservations for location Aspen, may not provide accurate results in the current version.
- Queries with date or time conditions might sometimes display inconsistencies because date-time values could be interpreted as either UTC or the user's local time zone.

Insight cards on the Workplace Central dashboard

Display key metrics and AI-generated insights from workplace data sources using Insight cards on the Workplace Central dashboard. These Insight cards are auto-generated using generative AI, enabling Space Planners, and Facilities Managers to make data-driven decisions to optimize workplace resources. Insight cards provide proactive insights into various workplace metrics such as space utilization, occupancy rates, attendance patterns, and reservation trends.

Insight cards tables

Workplace Insights adds the following tables.

Tables

Table	Description
AI Config Execution [sn_wsd_ai_agents_ai_config_execution]	Stores all the logs for all the prompt configuration runs.
AI Prompt Configuration [sn_wsd_ai_agents_ai_prompt_config]	Table with information about instructions and data provided to the large language model (LLM).
Insights [sn_wsd_ai_agents_insights]	Table that stores all generated insights.
AI Prompt User [sn_wsd_ai_agents_m2m_ai_prompt_user]	Table that holds M2M mapping between the prompt configuration and user criteria.
Insight User [sn_wsd_ai_agents_m2m_insight_user]	Table that lists all the users in the User Criteria for whom the insights are mapped or generated.

Scheduled jobs for Insight cards

Several types of scheduled jobs are added to generate Insight cards for workplace operations on the Workplace Central dashboard.

Scheduled jobs

Scheduled job	Run frequency	Description
Generate Workplace Insights - Weekly	Weekly	This scheduled job generates workplace Insight cards based on the configured data source and prompt configuration.
Send Insight Notifications - Weekly	Weekly	This schedule job runs weekly and sends email notifications

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Scheduled jobs (continued)

Scheduled job	Run frequency	Description
		to users when new workplace insights are generated.
WSD Reservation Historic Data Collection Job	On Demand	The PA admin role (pa_admin) must be explicitly assigned to users for them to run historic indicator jobs and edit indicators.
WSD Reservation Daily Collection Job	Daily	This scheduled job runs daily to collect indicator data.
Workplace Connectors Daily Collection Job	Daily	This scheduled job runs daily to collect scores and text index.
Workplace Connectors Historic Collection Job	On Demand	Run this adhoc scheduled job to to collect scores and text index for the specified date.

Configure workplace data sources

Configure multiple data sources to generate insights.

Before you begin

Role required: admin

About this task

Each data source is mapped to a prompt configuration, ensuring that relevant data is processed and transformed into actionable insights.

Procedure

1. Navigate to **All** > **Workplace Insights** > **Data Source**.
2. Select **New**.
3. On the form, fill in the fields.

Workplace Data Sources form

Field	Description
Name	The name used to identify the data source.
Application	By default, the application is set to AI Agents for Workplace Service Delivery.
Domain	By default, the domain is set to global.
Source	Option to specify the source from which this record is created. The following options are available: ○ Table ○ Indicator
Table	A source table from which the data is retrieved. The **Table** field appears when **Table** is selected from the Source

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Field	Description
	list. Select the required table from the list. For example, Reservation [sn_wsd_core_reservation].
Filter condition	Set the filters in the Filter Condition field and define the criteria. Add more conditions by selecting AND or OR. ○ If AND is selected, all conditions must be matched. ○ If OR is selected, either condition can be matched. This field appears when you select **Table** from the **Source** field.
Field selector	A list of fields available for selection. This field appears when you select **Table** as the value in the **Source** field.
Indicator	The **Indicator** field appears when **Indicator** is selected from the Source list. Select the lookup icon and select the indicator for the data source. Specify the details for the following fields that appear when you select **Indicator** in the **Source** field. ○ **Time Period** ○ **Step** ○ **Breakdown** ○ **Aggregator** For more information about the fields, see Performance Analytics indicators. **Note:** The PA admin role (pa_admin) must be explicitly assigned to users for them to run historic indicator jobs and edit indicators.

4. Select **Submit**.

Define AI prompt configurations

Define prompt configurations to control how data from each source is queried and presented to the large language model (LLM)

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Workplace Insights** > **Configuration**.
2. On the AI Prompt Configurations page, select **New**.
3. On the form, fill in the fields.

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Workplace Data Sources

Field	Description
Data source	The Workplace Data Source that is used to generate insights.
Skill	The Now Assist skill that generates AI#assisted output from ServiceNow data using a large language model (LLM).
Category	The classification or grouping of the AI prompt configuration. Select the required category from the following options: ○ Reservation ○ Space Management ○ Workplace Connectors For example, when you select **Reservation** and specify the instructions to the AI system, the system displays reservation insights on the **Reservation Management** tab on the Workplace Central dashboard.
Active	The option to enable the prompt configuration. By default, the field is set to **Active**.
Order	The order that this prompt configuration is displayed before the input.
AI instructions	Description of the specific tasks or analysis that the AI system is configured to perform. Include instructions and actions like data analysis, pattern detection, or predictive modeling. Provide clear and direct instructions for the AI system to follow when generating outputs. For example, Systematically analyze 2-week occupancy data to identify capacity utilization patterns, space optimization opportunities, and operational anomalies.
Threshold	Definition of the numerical or categorical limits or values that trigger specific analysis or flags within the AI system. For example, ○ High Occupancy Detection: 90% capacity threshold ○ Low Utilization Analysis: below 40% capacity threshold These thresholds help the AI system determine when to flag certain conditions or anomalies.
Example	Illustrative cases or scenarios that demonstrate how AI system instructions and thresholds are applied. This field helps users understand the expected inputs and outputs of the AI configuration. For example: ○ Campus attendance dropped 22% week-over-week (WoW) ○ Friday is consistently the lowest attendance day (-30% compared to Wednesday)

4. In the User Criteria section, select the user criteria record to decide which users, roles, and groups can see the respective insights.

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For example, Users with Reservation Manager role can view insights related to Reservation Management on the Workplace Central dashboard.

5. Select **Submit**.

Run the scheduled job to generate workplace insights

Run the *Generate Workplace Insights - Weekly* scheduled job to generate workplace insights based on the configured data source and prompt configuration.

Before you begin
Role required: admin

About this task
When the scheduled job is run, it creates multiple executions in the AI Config Executions table.

The execution process involves:

- Generating insight executions for each data source
- Sending data and prompts to the large language model (LLM) asynchronously
- Mapping returned insights to users and storing them for display on the Workplace Insights dashboard

Note: By default, the scheduled job is set to run weekly on the specified time. You can also run the scheduled job based on your preferences.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Job**.
2. From the Scheduled Jobs list, select **Generate Workplace Insights - Weekly**.
3. Run the job by selecting **Execute Now**.

View workplace insights on the dashboards

Access workplace insights directly from the Workplace Central Dashboard using Insight Cards. These cards deliver real-time data from various workplace sources, enabling managers and users to track important metrics like space utilization, occupancy rates, reservation trends, and environment summaries.

Before you begin
Role required: admin

Note: Insights are linked to relevant user profiles based on predefined criteria and are shown on the Workplace Central dashboard based on the selected category.

Procedure

1. Navigate to **All** > **Workplace Central** > **Workplace Central**.

   You can also open Workplace Central from the Employee Center. Navigate to **Workspaces** > **Workplace Central**

2. Select the following tabs to view insights related to a specific category:
   - Space Optimization
   - Occupancy Dashboard
   - Reservation Management

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Receive email notifications for Workplace Insights

Notify Space Planners, Reservation Managers, and Workplace Managers by email when new Workplace Insights are generated. The email notifications are sent to the users defined in the user criteria when the sn_wsd_ai_agents.weekly_insights event is triggered.

Before you begin
Role required: admin

About this task
The *Generate Workplace Insights - Weekly* scheduled job runs and creates insights based on user criteria. The *Send Insight Notifications - Weekly* schedule job runs weekly and triggers an email notification to the relevant users. The email includes a summary of the latest insights and a link to the Workplace Central dashboard to access the latest insights.

Note: Changing the **run time** or **day** fields for this scheduled job may impact the notifications sent. Make sure that any updates are consistent with the *Generate Workplace Insights – Weekly* job to ensure uniformity.

Procedure
1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the Name column, search for **Weekly**.
3. Select **Weekly Workplace Insights**.

Workplace Concierge agentic workflow

Use the Workplace Concierge agentic workflow to register visitors from existing communication tools like emails, calendars, or the Virtual Agent.

Note: Depending on your license, you will have access to certain application features, generative AI skills, agentic workflows, and AI agents. For more information, see .

Workplace Concierge workflow overview

Workplace Concierge is an agentic workflow that operates directly from communication tools like email, calendar, and Now Assist in Virtual Agent. When you add the Workplace Concierge to a conversation, it identifies the intent to schedule a meeting, gathers and validates the necessary visit details, confirms the information with the host, and then creates the visit and visitor invitations. If any mandatory detail is absent or ambiguous, Workplace Concierge pauses and communicates with the host before proceeding.

Workplace Concierge supports the following communication channels:

- Calendar invite: Workplace Concierge can be added as a guest to a calendar invite
- Email thread: Workplace Concierge can be added in the CC field of the email thread
- Now Assist in Virtual Agent: Workplace Concierge can be invoked in the chat by entering keywords like `invite a visitor`

After a visit is created, the Workplace Concierge sends invitation emails with a link to the visitor portal. Workplace Concierge also monitors replies and updates the visitor records. Visitors can respond to the email or use the portal link based on their preference. Hosts can use simple commands to send reminders or cancel specific visits, and they receive progress notifications like how many visitors have completed the pre-check tasks.

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Workplace Concierge workflow

To access the Workplace Concierge workflow, follow these steps:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Automate map updates**.
3. Select **Define trigger** to review the trigger factors for this agentic workflow.
4. The **Display** option enables the Now Assist panel. For more information, see Select display.

AI agents used in the Workplace Concierge workflow

The **Connect AI agents** section in the Describe and Connect workflow displays the AI Agents that are working on the Automate map updates workflow.

The following agents are used in the Automate map updates workflow:

Connect AI agents

AI agent Name	Description
Chat Visit Agent	This agent assists hosts in managing workplace visits, adding visitors and checking visit requirements from Now Assist in Virtual Agent.
Email Visit creation agent	This agent assists hosts in managing workplace visits from emails and calendar invites.
Email Visitor Intake agent	This agent collects and processes visitor information through email replies sent by visitors. The agent communicates directly with visitors via email and updates visitor records based on email responses.

Select display

In the Select a UI display section, select **Display** to display the Now Assist panel. Workplace users with the now_assist_panel_role receive notifications for the triggered use case output. When the Now Assist panel option is enabled, the AI agent output or notifications are displayed in the Now Assist panel.

Note: To view the output from a triggered use case, you should have the now_assist_panel_role.

Select this option to receive and review notifications sent by AI agents in the Now Assist panel. AI agents send notifications to Map Admins in the Now Assist panel about updates to the import tasks.

Related topics

- Now Assist AI agents
- Install Now Assist AI agents
- AI Agent Studio

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Use Workplace Concierge with Now Assist in Virtual Agent

Invoke Workplace Concierge from Now Assist in Virtual Agent to invite visitors to your organization.

Before you begin

Role required: sn_wsd_core.workplace_user and now_assist_panel_user

Procedure

1. Navigate to **All** > **Self-Service** > *Employee Center*.
2. From the Employee Center portal home page, select the Now Assist in Virtual Agent chat interface.
3. Enter an utterance or query to invite visitors.

   You can invite visitors using a single utterance or prompt. For example, enter `Invite Abel Tuter to Building A at 3pm on Wednesday`.

   While the LLM processes the utterance, animated dots in the chat window let employees know that the Workplace Concierge is working on the request. Based on the provided information, a synthesized response may appear. If any required information is missing, the Chat Visit Agent agent prompts you to enter the information.

   Note: The questions asked by the Chat Visit Agent agent are based on the initial requirements that are set by your admin.

   For example, if the visitor email is missing, the Chat Visit Agent agent prompts you to enter the email, then you can enter `abel.tuter@example.com`.

   After all the required information is provided, the visit information is displayed for confirmation.

   Each response includes feedback icons. You can indicate if the response was helpful by selecting thumbs up or select thumbs down if the response wasn't helpful.
4. Verify the details of the visit, then select the confirm option to create the visit.
   After you confirm the details, Workplace Concierge creates a visit and invites the visitors using the email addresses. For more information about visitor registrations, see Registering a visitor.

What to do next

Visitors can reply to the invitation email to provide information for their pre-check tasks. The Email Visitor Intake agent processes email replies and updates the visitor records.

If Workplace Concierge is included in any emails that are sent to the visitors, the Email Visitor Intake agent scans the email threads for relevant data and updates the visitor records.

Use Workplace Concierge with email or calendar invite

Add the Workplace Concierge to an email thread or a calendar invite.

Before you begin

Role required: sn_wsd_core.workplace_user

Procedure

1. Open the email thread or calendar invite that you want to create a visit from.
2. Add `Workplace Concierge` to the email thread or the calendar invite.
   The email address for Workplace Concierge is configured by your admin.

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Choice	Description
Calendar invite	Add Workplace Concierge as a guest to the calendar invite. Workplace Concierge extracts the meeting date and time, host identity, location, and at tendee email addresses.
Email thread	Add Workplace Concierge in the **CC** field of the email thread. Alternatively, forward the email thread to the Workplace Concierge. Workplace Concierge scans the email thread for words or phrases that indicate an in-per son visit or meeting. Workplace Concierge then scans for the date and time, location, visitor type, attendee email addresses, and other mandatory require ments set by the admin.

If any required information is missing, Workplace Concierge sends an email to request clarification.

3. Reply to the Workplace Concierge email clarifying the information.

   Example
   For example, if an email thread contains two locations, or if the location is not found in the Workplace Service Delivery location hierarchy, reply with the exact location name.
   After receiving all the information, Workplace Concierge sends an email with the visit details for confirmation.

4. Verify the details of the visit, then reply with a confirmation.
   After you confirm the details, Workplace Concierge creates a visit and invites the visitors using the email addresses. For more information about visitor registrations, see Registering a visitor.

What to do next

Visitors can reply to the invitation email to provide information for their pre-check tasks. The Email Visitor Intake agent processes email replies and updates the visitor records.

If Workplace Concierge is included in any emails that are sent to the visitors, the Email Visitor Intake agent scans the email threads for relevant data and updates the visitor records.

Process images to tasks workflow for Workplace Case creation

The Process images for new tasks workflow enables workplace users to report workplace issues by capturing and uploading images through the Now Assist Panel or Now Assist for Virtual Agent interfaces. The system automatically analyzes the image and creates a workplace case with populated fields including short description, description, and priority.

The Process images for new tasks agentic workflow allows workplace users to quickly report workspace issues by uploading or capturing an image from the Now Assist Panel or Now Assist Virtual Agent on web or ServiceNow mobile. Instead of manually entering case details, users submit a photo—such as a liquid spillage, damaged furniture, or a facilities concern—and the workflow automatically creates a well-categorized workplace case with relevant information extracted from the image.

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This workflow is a platform-shipped, base system agentic workflow available in AI Agent Studio under the Platform AI Agents and Skills scope. It is generic and supports all task and task-extended tables. For Workplace Service Delivery, the workflow is configured to create records in the Workplace Case table by mapping the Workplace User role to that table in the skill configuration.

Required role: sn_wsd_core.workplace_user.

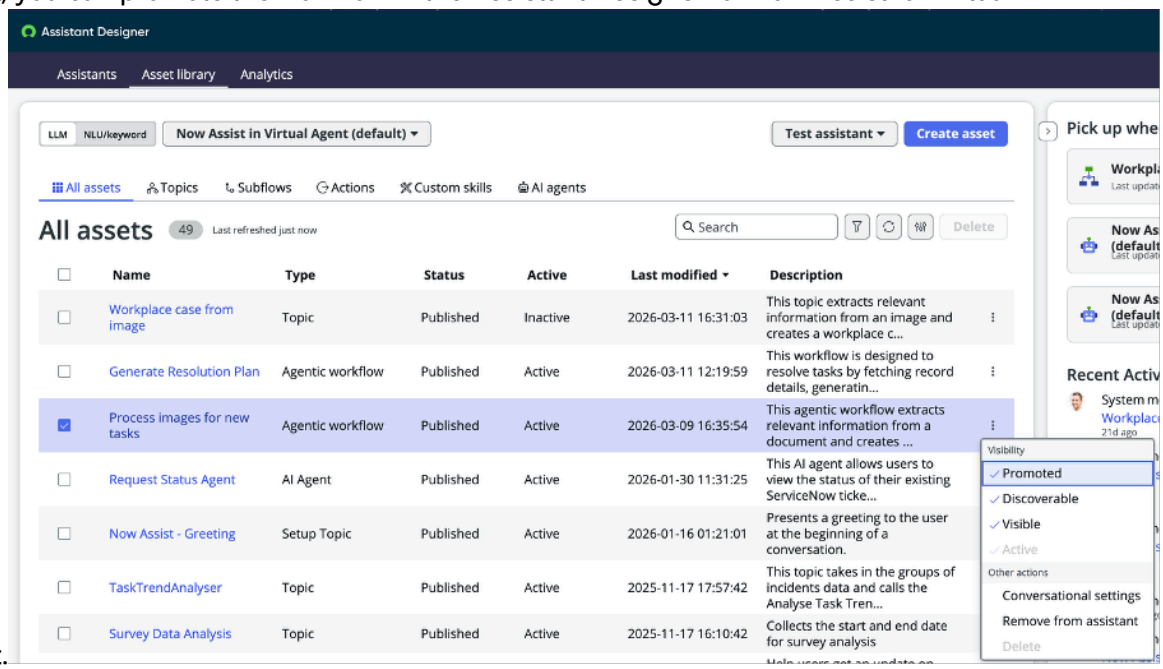
To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**
2. Select Process images for new tasks.

Prerequisites and setup

To access this workflow, you must have the AI-related plugins (Now Assist for Platform) installed on your instance including Platform AI Agents and Skills and Now Assist in Document Intelligence.

If you want the ability for users to create workplace case from images using Now Assist Panel and Now Assist for Virtual Agent, you must activate the Process images for new tasks workflow and set the display for Now Assist Panel and Virtual Agent (Now Assist in Virtual Agent). If this agentic workflow cannot be discovered in Now Assist for Virtual Agent, you can promote the workflow in the Assistant Designer for Now Assist for Virtual Agent.



Skill configuration

The Image Processor Agent reads a skill configuration to determine which task table to use when creating a record. Add a mapping entry that maps the Workplace User role to the Workplace Case table (sn_wsd_case_workplace_case).

- Go to the Now Assist Skill Config [sn_nowassist_skill_config] table.
- Open the record named **Image to task config**.
- In the Now Assist Skill Config Var Set related list, select the **Tables Mapping** configuration variable set.
- Set the variables for the configuration type.
- Save the Var Set.

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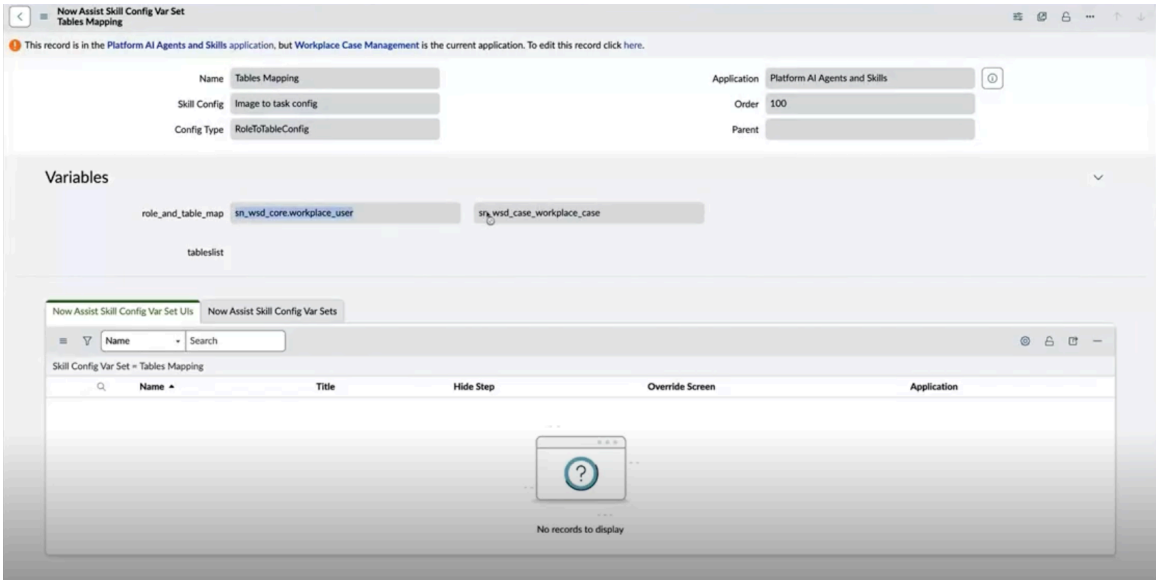

Define security controls

In the Define data access settings section of the Agentic AI workflow, you must also add the necessary roles to enable read and create access on the table (Workplace Case) you want to be able to create records on. You can add the workplace user [sn_wsd_core.workplace_user] role to the agentic workflow so that it can access case records.

Select channels and status

- Enable the Now Assist Virtual Agent channel so users can trigger the workflow from the virtual agent chat.
- Ensure the Virtual Agent is active on the portals where users will access it.

Sample utterance

The following sequence describes the end-to-end flow from image upload to workplace case creation.

1. Access Now Assist Panel (Platform) or Now Assist for Virtual Agent on web (Now Platform) or ServiceNow mobile app.
2. To trigger the Process images for new tasks agentic workflow, enter `Create a workplace case from an image` or similar phrases in the Now Assist panel or on the ServiceNow mobile app to trigger the workflow.
3. When prompted by the Image Processor Agent, upload an existing image or use your device camera to capture a photo of the workspace issue. Supported file types: JPEG, PNG.
4. Review the AI-generated summary and the details extracted from the image.
5. Select **Proceed** to confirm case creation.

A workplace case record is created with the **Short Description**, **Description**, and **Priority** fields populated from image analysis. The Workplace Service defaults to General Workplace Inquiry, the Requested For defaults to your user profile, and the Workplace Location defaults to the primary workplace location of your Workplace profile (if set). The uploaded image is attached to the case record.

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AI agents used in the Process image for new tasks workflow

The following table lists the agents that are part of the Process image for new tasks agentic workflow.

AI Agents in the Process image for new tasks workflow

Agent	Description
Document and visual insights AI agent	Extracts information from images.
Image Processor Agent	Analyzes the uploaded image to extract contextual details about the issue. Generates the short description, description, and priority based on the image content.

Overview of Autonomous L1 Agent for Workplace Cases

Use the Autonomous L1 Agent for Workplace agent that automatically resolves frequently asked General Inquiry workplace cases without requiring manual agent intervention.

The Autonomous L1 Agent represents the initial uptake of ZTSD (Zero Touch Service Desk) Agent capabilities within Workplace Services. The agent scans two configured knowledge sources Workplace Services knowledge base articles and previously closed workplace cases to identify matching resolutions and close eligible cases autonomously. When no match is found, the agent surfaces its best findings, unassigned itself, and returns the case to Ready state for human agent follow-up.

Overview of Autonomous L1 Agent for Workplace Cases

Workplace service desks receive a high volume of repetitive General Inquiry cases—questions about policies, services, and procedures that can be resolved from existing knowledge without live agent involvement. The Autonomous L1 Agent addresses this by processing cases immediately on creation, applying AI-driven knowledge matching against configured sources, and resolving or escalating cases based on outcome.

When a General Inquiry workplace case is created, the L1 agent is automatically assigned to it —no manual routing is required. The agent queries its configured knowledge sources to find a matching resolution.

Knowledge Sources

The agent learns from two default knowledge sources.

- Workplace Services knowledge base articles configured in the instance
- Previously closed workplace cases that contain resolution information

As agents manually resolve new types of cases, those resolutions are automatically added to the agent's learning corpus, improving autonomous resolution rates over time.

Prerequisites

Before enabling the L1 agent, verify the following are in place:

- The ZTSD agentic platform plugin is activated in the instance.
- Workplace Services knowledge base articles are published and accessible.
- At least one previously closed General Inquiry workplace case with resolution data exists, or knowledge articles relevant to expected query types are available.

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Agent Behavior

The following table describes L1 agent behavior for each case resolution scenario.

Agent behavior

Task	Behavior
Knowledge match found	Provides resolution, populates close notes, transitions case to Closed Complete, then returns to Awaiting Acceptance per WSD configuration
No knowledge match found	Shares best-available findings, unassigns itself, and returns the case to Ready state so a live workplace agent can take over.
Case resolved manually by agent	The resolved case is added to the agent's learning corpus. Future similar queries are resolved autonomously using this prior case data.

Case Lifecycle

The following sequence describes the full lifecycle of a General Inquiry case handled by the L1 agent.

Case creation

An employee submits a General Inquiry workplace case through the service portal.

Automatic assignment

The case is immediately assigned to the L1 agent. No manual routing or triage is required.

Knowledge scan

The agent queries configured knowledge articles and previously closed cases for a matching resolution.

Resolution path A – Match found

The agent populates the resolution field and close notes with the retrieved answer, transitions the case to Closed Complete, and the case returns to Awaiting Acceptance according to the configuration of General Inquiry Workplace services.

Resolution path B – No match found

The agent unassigns itself, and returns the case to Ready state so a human workplace agent can resolve it manually. A draft response is available in the Additional Notes/Work Notes text area.

Learning loop:

When a human agent manually resolves a case (Path B outcome), the resolved case is added to the agent's knowledge corpus. Subsequent cases with similar questions are resolved autonomously.

Supported Use Cases: General Inquiry Workplace Case

The L1 agent is designed for General Inquiry workplace cases where the resolution can be derived from existing knowledge, such as:

- Policy questions (for example, room booking rules, visitor parking guidelines).
- Workplace service inquiries (for example, cafeteria service hours, team space availability).
- Procedural questions that have been previously resolved and documented in closed cases.

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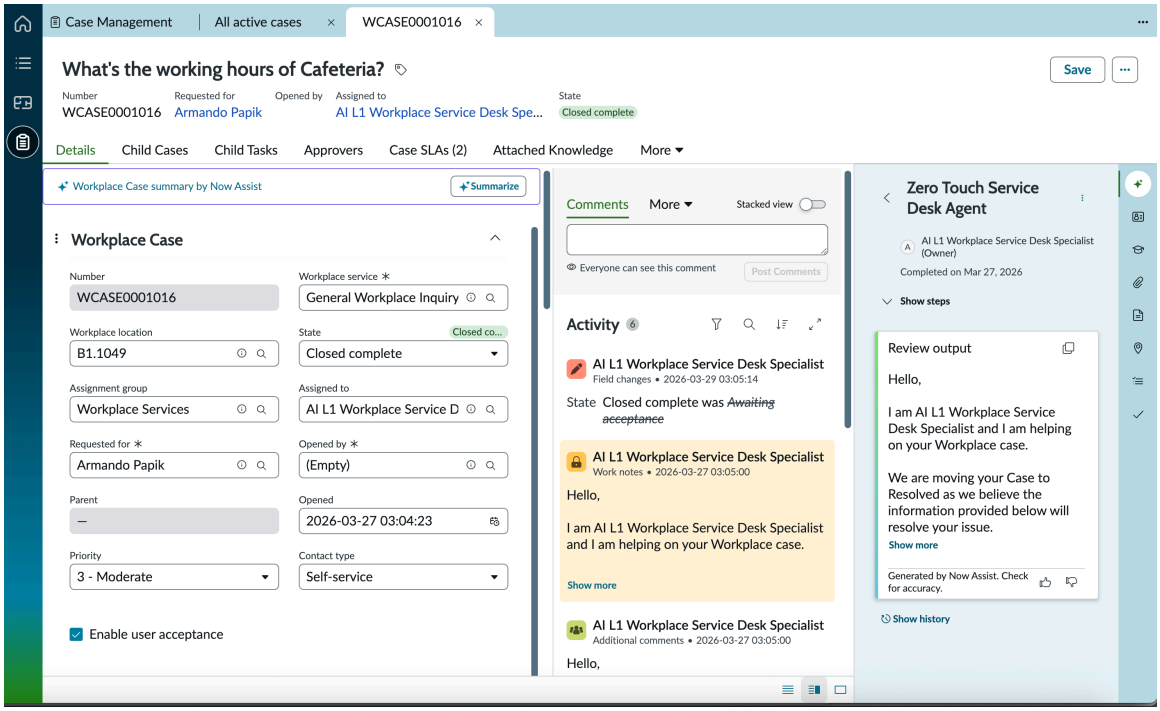

Using Now Assist in Virtual Agent

Reserve a space using the create a reservation agent and get insights on your collaborators using the Workplace Collaboration agent.

Employees can interact with the reservation agent and collaboration agent using the Now Assist in Virtual Agent enhanced chat interface.

Visit these resources about Now Assist in Virtual Agent.

Important: By default, pinning a chat window is enabled for Service Portal. For all other portals, an admin must create a system property to enable pinning a chat window. For more information, see Now Assist in Virtual Agent system properties.

- Enhanced chat
- Now Assist in Virtual Agent
- Portal prerequisites for enhanced chat
- Configuring assistants overview
- Using Now Assist in Virtual Agent
- Exploring Now Assist in Virtual Agent

Making reservations using the Create a reservation agent

The Create a reservation agent enables employees to find an available space and create workplace reservations quickly. Employees can interact with the reservation agent using the Now Assist in Virtual Agent enhanced chat interface in Employee Center. They can also use the Now Mobile® chat interface for interacting with the Virtual Agent.

The reservation agent estimates where the employees are located for a given workday. It considers their workplace profile (assigned space to an employee) and the spaces they most frequently reserve. Based on this information, the reservation agent finds and suggests spaces for reservations. The employees can suggest a different space, time or location using the chat interface. The agent also provides employees with an option to select a space manually from the

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reservation portal. The option to select a space manually is provided by the reservation agent when it is not able to find a space that is requested by the employee or when the employee wants to search for a different space than what is suggested by the reservation agent.

While searching for a space and making a reservation, the reservation agent considers the following:

- Date and time information when the employee is requesting to book a space for reservation.

  For example, if the reservation agent doesn't find a date in the utterance "Reserve a space for me", the reservation agent reserves a space for the current date and for all day. If time is provided, it tries to find an available space for the suggested time. For example, if you enter the prompt “Reserve a space for me from 3 pm to 4 pm” in the Virtual Agent chat interface, it reserves a space for you from 3 pm to 4 pm.

  If no time is provided, it reserves a space for All day. For more information, see Configure a reservable module.

  - When the **All day meaning** Reservable module configuration value is set to **Office hours**, the reservation agent makes a reservation for daytime. For example, if the office Start time is 9 am and End time is 5 pm, the reservation agent reserves a space based on the start day and end day reservation properties.
  - **All day meaning** Reservable Module value set to **Full day**.

    The reservation agent reserves a space based on the 24-hour clock or 12-hour clock notations. For 24-hour time format, it reserves the space from (00 to 23.59). For 12-hour time format, it reserves a space from (9 am- 12 pm) and evening (1 pm to 5 pm) based on the office working hours. For more information, see Properties installed with Workplace Reservation Management.

- **Max days in future** value in the Reservable Module. This value is set by your workplace administrator. The reservation agent reserves a space and provides dates for reservation based on the highest value given in the **Max days in future** configuration. If the **Max days in future** value is empty, the reservation agent provides a navigational link to the Advanced Reservation Portal. Employees can select the link to navigate to the Advanced Reservation portal and select a space manually. For more information, see Create a reservation.
- The reservation agent also checks the Workplace Concierge employee presence dashboard for insights on employees in-office days. For more information, see Configure workplace space suggestions for employees.

  If Workplace Concierge isn’t installed, the reservation agent uses the workplace profile information (assigned space to an employee) to reserve an available space. It uses the primary location that is set for an employee to fetch the building location and available spaces for reservation.

  If the workplace profile isn’t available, the reservation agent considers the past reservation data of an employee and shows space suggestions based on the past reservation data (most frequently reserved spaces, date, and time). If the reservation agent isn’t able to fetch or predict a location, it asks employees to enter manually their preferred workplace locations in the Virtual Agent chat interface. It provides space suggestions based on employee prompt inputs.

- **Workplace Locations** tab information in a Reservable Module. The application provides suggestions from the configured workplace locations only. For example, if about 10 building locations are added to the Workplace Locations tab in a Reservable Module, employees can select a space only from one of these 10 buildings for reservation. Employees can’t reserve a space, which isn’t added to the workplace locations. For more information, see Configure a reservable module.

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Reserve a space using the reservation agent

The Create a reservation agent enables employees to reserve a space with a single prompt query or utterance.

Before you begin

Make sure that you have installed and configured the following applications:

- Now Assist in Virtual Agent.

  Confirm that the enhanced chat is configured for the Employee Center portal by virtual_agent_admin. Select Employee Center from the Portals tab and select the enhanced chat. For more information, see Display your chat assistant on a portal, channel, or mobile app.

- Workplace Reservation Management
- Workplace Concierge
- Workplace Indoor Mapping
- Workplace Core

Note: Adding workplace services to a reservation, creating group reservations, multi-building reservations, making a reservation by using the Browse near a person reservable path option, or recurring reservations are currently not supported by the workplace reservation AI agent.

Role required: admin

Procedure

1. Navigate to **All** > **Self-Service** > *Employee Center*.
2. From the Employee Center portal home page, select the Now Assist in Virtual Agent chat interface.
   The Virtual Agent shows a greeting message and provides an explanation of what employees can expect.
3. Enter an utterance or query to reserve a space.

   Employees can quickly reserve a space using a single utterance or prompt. For example, enter `I want to reserve a workstation for the afternoon. What is available?` .

   While the LLM processes the utterance, animated dots in the chat window let employees know that the reservation agent is working on their request. After you enter an utterance and a search result is found, a synthesized response may appear. A synthesized response includes a brief summary of the requested information and search results.

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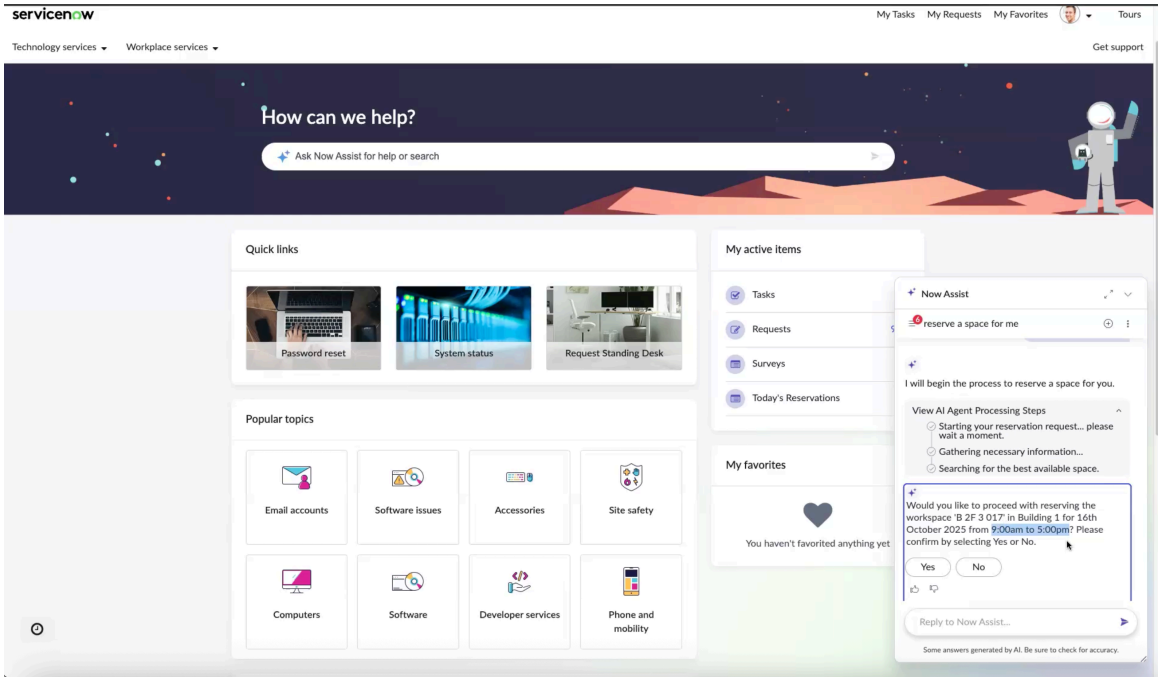
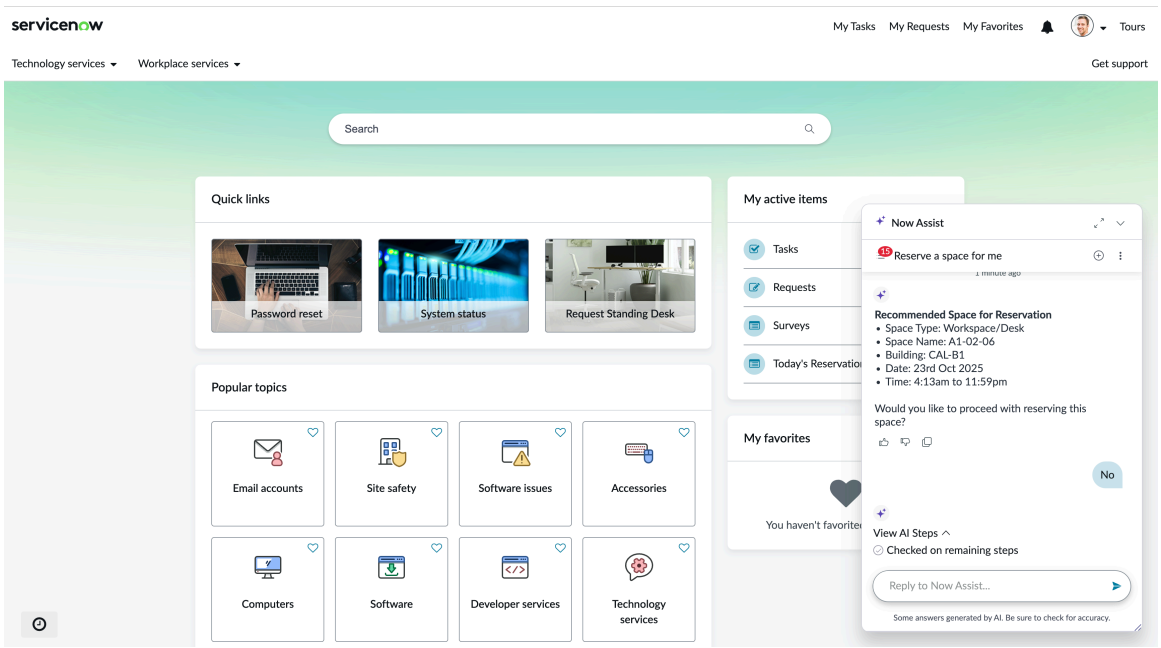


Each response includes feedback icons. The user can indicate if the response was helpful by selecting thumbs up or select thumbs down if the response wasn't helpful.

4. The reservation agent shows an available building location for reservation and asks employees to confirm the space selection.

   Note: Selecting **No** prompts the reservation agent to fetch another location or a space for reservation. At a time, the reservation agent shows three space suggestions.



5. The reservation displays a navigational link to the Advanced Reservation portal when it is not able to find a suitable space.
   It provides the link to the Reservation portal when employees don't select a space from the suggested spaces shown by the reservation agent. At a time, the reservation agent provides three space suggestions. Employees can search for spaces manually on the reservation portal page and reserve a space.

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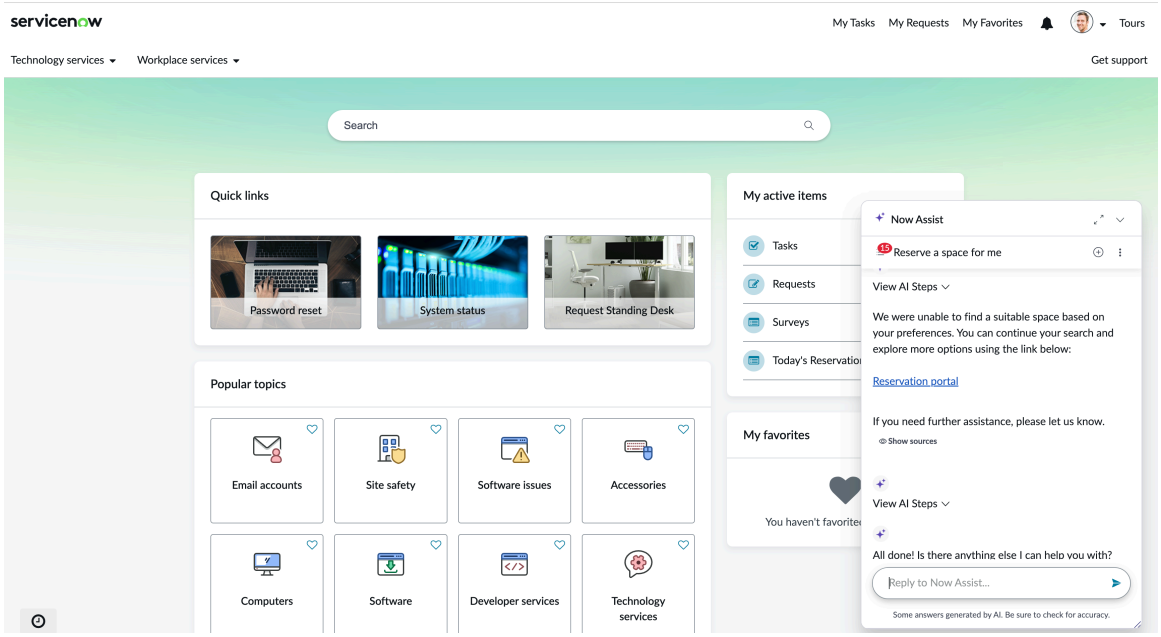
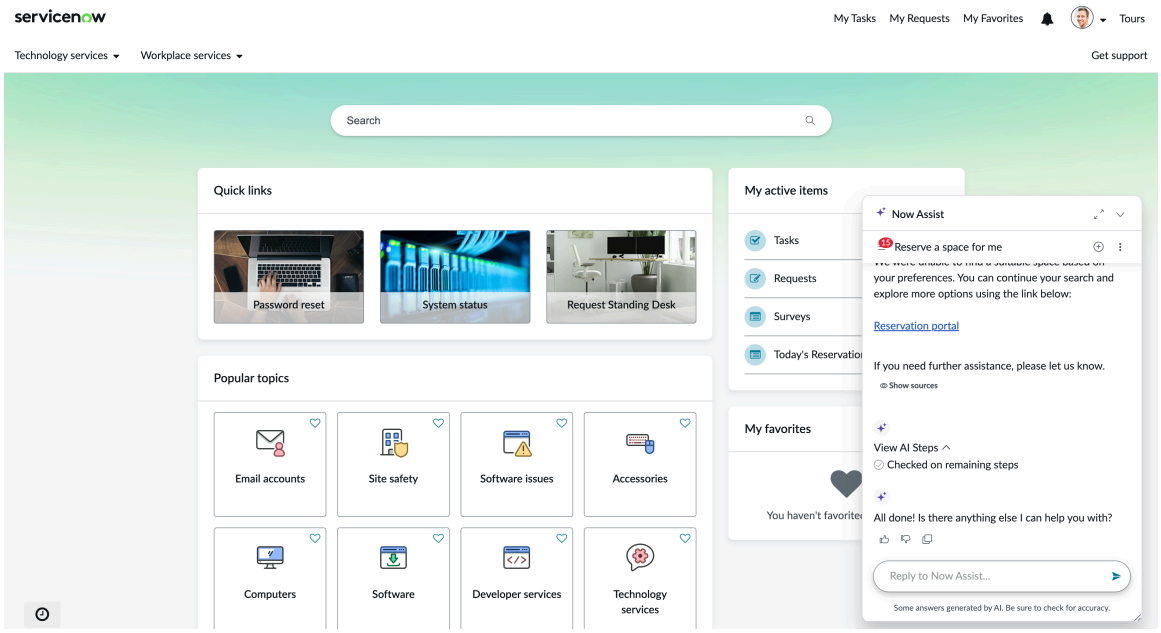


6. When the request is complete, Now Assist in Virtual Agent chat interface displays a message to confirm if employees need any additional help from the Virtual Agent.



Using the workplace collaboration Agent for space suggestions

The Workplace Collaboration Agent provides insights on your team members in-office attendance. Based on this information, the reservation agent finds and reserves a space for reservation and collaboration. The collaboration agent considers your colleague's in-office days, location, and suggests a space for collaboration when you are in office.

The Create a reservation agent helps employees find a space for reservation. The Workplace collaboration agent provides suggestions for reservations based on colleague's attendance and proximity. Employees can find and reserve a workspace near a colleague. The collaboration agent helps in improving collaboration and workplace productivity. The collaboration agent provides insights on your colleagues in-office days.

Note: Desks reservations are supported by the Workplace collaboration agent.

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When providing suggestions for collaboration, the Collaboration agent prioritizes the Employee Presence Exceptions data first, then it checks for Employee Presence Routine, and lastly, it considers your current reservations. It gives priority to Employee Presence Exceptions data over Employee Presence Routine and current reservations in the system. If employee's current reservation data and location in available and no workplace presence information is there, the agent prioritizes employee's current reservations over workplace location while suggesting spaces for collaboration. For more information, see Workplace Concierge.

Your collaborators can be categorized as:

- Employee collaborators information derived from Employee Presence Exceptions and Employee Presence Routine in Workplace Concierge.
- Collaborator information is also derived from the invitees that you frequently add to your reservations with while making a reservation.
- Colleagues with whom you collaborate frequently. Your team members and your manager. If you are a manager, your collaborators are your team members reporting to you.

The workplace collaboration agent improves employee's reservation and collaboration experience by providing the following:

- Determines your collaborators (your team members, your presence collaborators (if available), and your reservation attendees).
- Provides insights when collaborators are in office.
- Provides insights about team members who are in office for a specific day.
- Helps to reserve a space near a colleague.
- When multiple collaborators with same name exists, the collaboration agent asks employees to select their preferred collaborator from a list of similar names. The collaboration agent makes suggestions and tries to find your preferred collaborator. For example, if there are two Abel in your organization, but you frequently collaborate with Abel Tuter, the collaboration agent selects Abel Tuter as your preferred collaborator.
- Provides ability to change the workplace preferences of an employee (remote to in-office and vice versa). If employees change their remote day to in-office day, an exception is created by the application in the Employee Presence Exceptions table.

Note: If you are planning to sit near a colleague, and if your colleague has a desk reservation for one hour and doesn't have an All day reservation, you can make a reservation for one-hour only. If an employee doesn't have any Employee Presence Exceptions and has no reservations made for a day while in office, the collaboration agent prioritizes the employee's workplace profile location and spaces around that location is suggested to the employee for collaboration.

Related topics

Set Employee Presence

Components installed with Workplace Concierge

Get space suggestions using the Workplace collaboration agent

The Workplace collaboration agent provides space recommendations and insights for collaboration based on employee's workplace presence data, team members or frequent collaborators, attendees in your reservation, and workplace profile (assigned space).

Before you begin

The collaboration agent provides employees with insights about colleagues or team members who are in office. It makes space suggestions based on your collaboration requirements.

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Make sure that you have installed and configured the following applications:

- Now Assist in Virtual Agent.

  Confirm that the enhanced chat is configured for the Employee Center portal by virtual_agent_admin. Select Employee Center from the Portals tab and select the enhanced chat. For more information, see Display your chat assistant on a portal, channel, or mobile app.

- Workplace Reservation Management
- Workplace Concierge
- Workplace Indoor Mapping
- Workplace Core

Note: Adding workplace services to a reservation, creating group reservations, multi-building reservations, or recurring reservations are currently not supported by the Workplace Collaboration Agent. Collobration agent supports Desks reservations.

Employees can invoke the collaboration agent by initiating a chat with the Now Assist in Virtual Agent from the Employee Service Center portal.

Role required: admin

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. From the Employee Center home page, select the search box to initiate chat with Now Assist in Virtual Agent.
   The Virtual Agent shows a greeting message and provides an explanation of what employees can expect.
3. Enter an utterance or query to reserve a space.

   Employees can quickly reserve a space using a single utterance or prompt. For example, enter `Reserve a space for me near Abel Tuter`.

   While the LLM processes the utterance, animated dots in the chat window let employees know that the bot is working on their request. After you enter an utterance and a search result is found, a synthesized response may appear. A synthesized response includes a brief summary of the requested information and search results.

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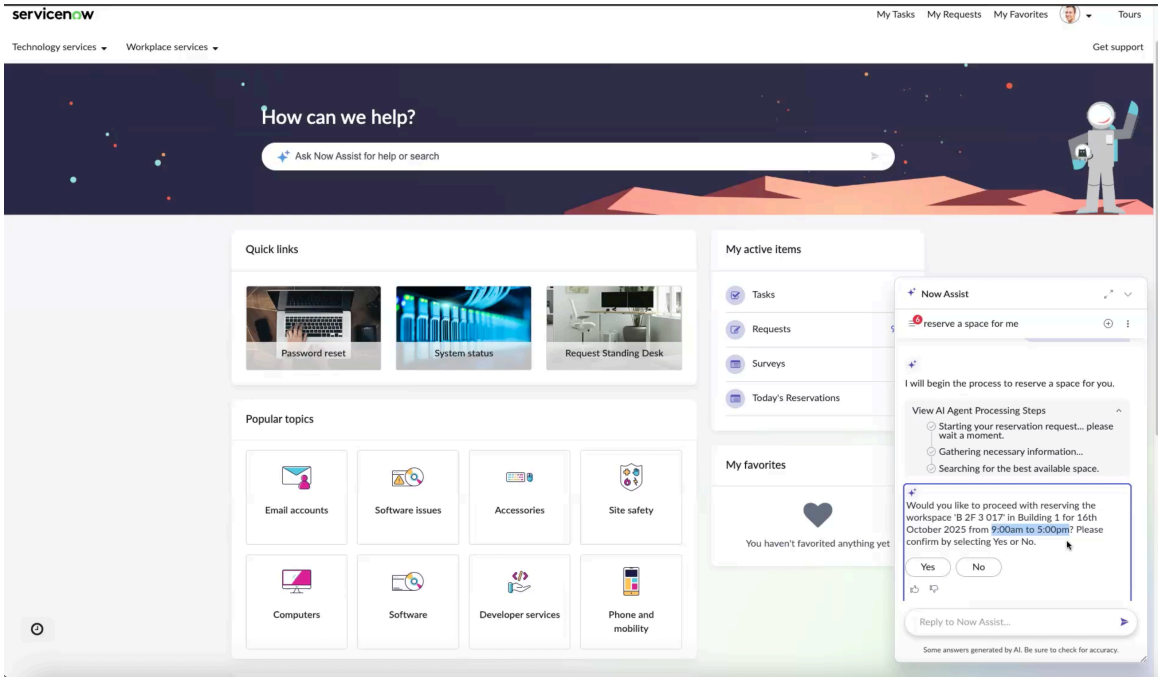

The Virtual Agent response includes feedback icons. Employees can indicate if the response was helpful by selecting thumbs up or select thumbs down if the response wasn't helpful.

4. The colloboration provides insights about team members who are in office.

   It suggests a space based on your collaboration requirements.The Agent shows an available building location for reservation and asks employees to confirm the space selection.

   Note: Selecting **No** prompts the agent to fetch another location or a space for reservation.

   For example, if you enter "I am visiting office campus in Italy and want to collaborate with Abel. What space is available?

   The agent may respond as following:

   It is great to see you in the office and connect with your collaborators! Abel will be in the office next Tuesday.We have found an available workspace for you:

   - Space Name: B1-03-01
   - Building: AMS-B1
   - Date: Thursday, 30th October 202
   - Time: 1:00pm to 5:00pm (Europe/Amsterdam)

   Would you like to proceed with reserving this workspace?

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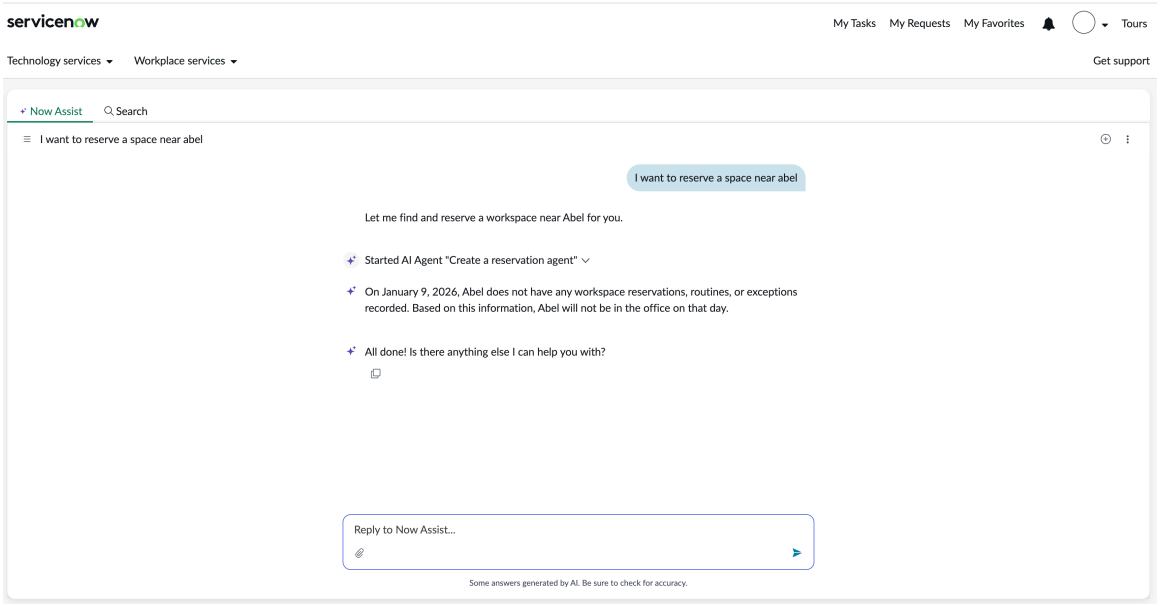

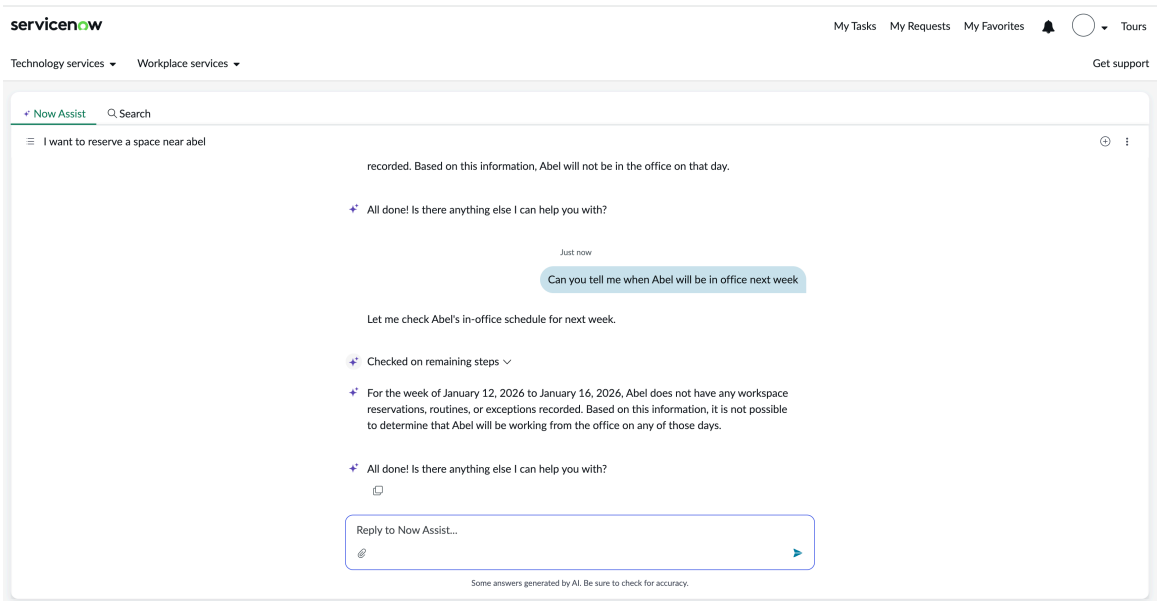

If you respond "yes, that sounds good", the agent creates a reservation and sends you a notification.

5. Chat with the collaboration agent to know which of your team members are available in your in office days.

Insights on a colleague's in office days

Employee Prompt	Agent responses
I am visiting the Hyderabad office and want to collaborate with Sarah. What is the best day?	Sarah is in office on Tuesdays and Wednesdays.
Which space is available for Tuesday?	Space A in Hyderabad is available.
Book this space for me	I have reserved this space for you.

The Collaboration agent also shares insights on the team members available on a particular day. For example, "Who will be in office on Friday? You can also get insights on a team member

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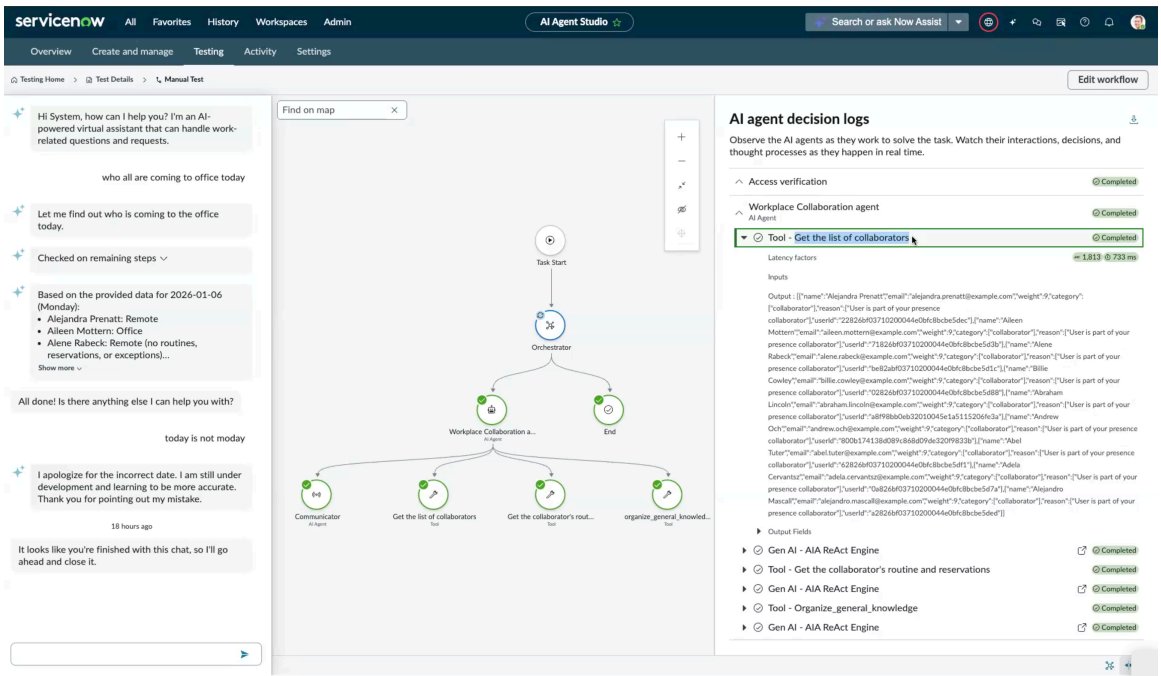
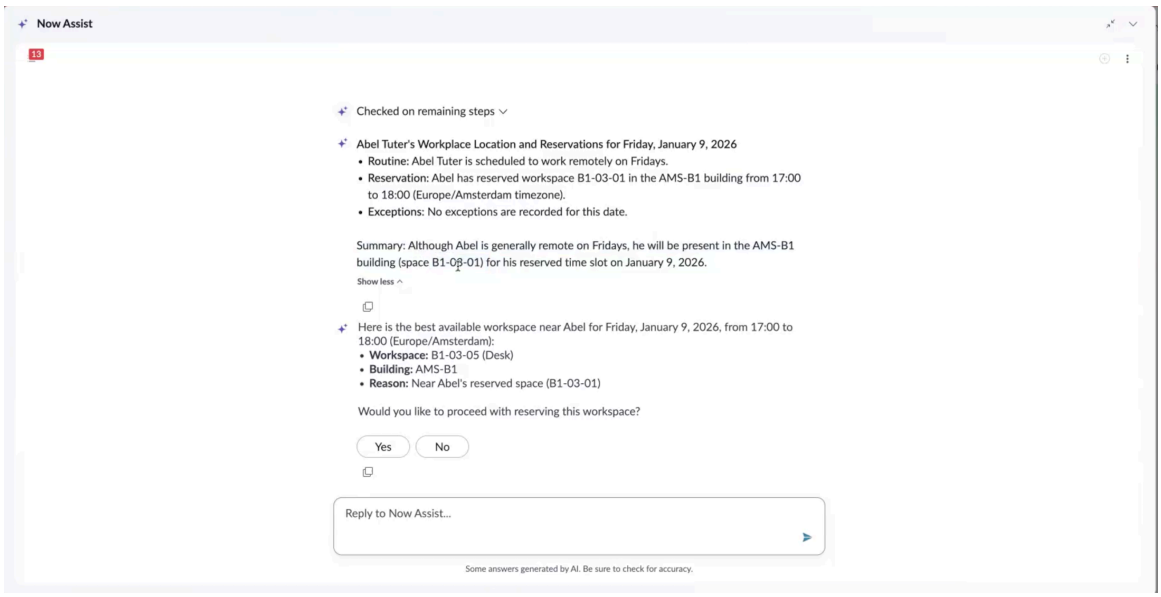
if they are visiting office "Is Daniel coming to office today?". The agent also makes a reservation for you for a specified day near a team member. "



6. Make a reservation for a specified day near a team member.



Reservation for a specific date near a colleague

Employee Prompt	Agent responses
Can you book me a space near Sarah for Jan 30?	According to Sarah's presence information, Sarah is office on this day, but has not reserved a space as of now. Sarah's office presence schedule is: ○ Monday: Remote ○ Tuesday: In office

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Employee Prompt	Agent responses
Sounds good.	Space B is available, which is near the space Sarah normally reserves. Shall I reserve this?
Book this space for me	I have reserved this space for you.

- While executing the Workflow, the collaboration agent makes the following considerations and checks.
  - Location: Employee's building location is derived using the following logic:
    - The building and floor for today's (current date) reservation.
    - Employee presence information
    - Workplace profile primary location or assigned space

      In case, no desks reservation are found, the collaboration agent checks if there is a workplace profile and a location (desk) assigned to an employee while making space suggestions near a collaborator. If workplace profile primary location is not available, the collaboration agent determines the collaborators location (building/space) based on the employee's workplace presence information.
  - When the employee enters a name, the collaboration agent tries to identify the collaborator. It takes into account the following factors:
    - Your team (this includes your manager. If you are a manager and not an individual contributor, the agent also considers employees reporting to you as your collaborators).
    - Workplace presence Collaborator information. This includes Employee Presence Routine and Employee Presence Exceptions. For more information, see Components installed with Workplace Concierge and Set Employee Presence
    - Your current reservations in the system and invitees added by you.
    - Your workplace profile and the primary location assigned to you.
    - If multiple colleagues are found with the same name, the agent allows you to select a colleague from a list of employee names.
- Time: All day reservation is considered first, and then, the reservation Start time and End time reservation is taken into consideration. For more information, see Properties installed with Workplace Reservation Management.

  In the case multiple desk reservations exist, earliest start time is used to find an available space for collaboration.
- Date: If no date is provided, the collaboration agent assumes that the reservation is for today or the current date. By default, All day reservation is suggested. Employees can change this and suggest a different start time and end time for a reservation.

Note: Adding of workplace services (projectors, catering, and so on) are not supported by the Collaboration agent.

7. Collaboration Agent provides a link to the Reservation portal if it is unable to find a suitable space for you.
   You can navigate to the Reservation portal and manually search for your preferred space.
8. When the request is complete, Virtual Agent displays a message to confirm if any additional help is required.

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Emergency Response Management

ServiceNow® Emergency Response Management applications help your organization mobilize its business continuity efforts during natural disasters and pandemics like COVID-19. Streamline and automate activities on multiple fronts to keep everyone informed and connected as you anticipate or experience emergencies.

Video describing the Emergency Response Management apps and how they work together

Emergency Response Management applications include:

Emergency Outreach

Stay connected with users via email or mobile push notifications. Share important information regarding emergency and safety measures, and ask users to report their status and location. With the installation of Employee Readiness Surveys, you will use Emergency Outreach to send a survey link to help you evaluate whether users are ready to return to the workplace.

Emergency Self Report

Enable your users to report their health status. If users report they are going into quarantine, a workflow helps them safely return to work when ready. Functions such as HR can also be alerted.

Emergency Exposure Management

Identify users who might have been exposed to an infectious disease by analyzing an affected user's meetings, locations, shifts and reservations, and badge scans.

Emergency Response Management for Now Mobile

Enable your users who use the Now Mobile app to respond to Emergency Outreach push messages and also self-report their health status.

Use the Emergency Response Management applications together to automate workflows for sharing information with users, assessing the impact on your team, and responding to the emergency event.

Emergency response app workflow from self-reporting to assessing exposure to requesting user health status check-in

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Emergency Response Management for federal customers

Federal customers using IL4 or FedRAMP environments will see the Emergency Response Management applications ready and available to install on their instances without having to make any special requests. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

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Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Domain separation support for Emergency Response Management applications

You can learn about domain separation support for service provider use cases in each Emergency Response Management application's topic.

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Emergency Outreach

Notify users of important information about anticipated or occurring emergency situations. Send an outreach notification via email, mobile push message, or SMS message to request a user response. You can also configure other preferred communication channels.

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Emergency Outreach was developed with other ServiceNow® Emergency Response Management apps to monitor and aid in stopping the community spread of infectious diseases, such as COVID-19 among users. With the release of additional ServiceNow® Safe Workplace suite apps, companies are able to manage an emergency situation from the outbreak through the reopening of the workplace.

Some of the Safe Workplace suite apps leverage the Emergency Outreach notification feature to communicate with users.

- Employee Readiness Surveys provides an outreach notification with a link to a survey to assess user readiness to return to the workplace. Customize the notification and the survey to address your company's concerns.
- Employee Health Screening uses outreach notifications to request that users submit their health status verification each day before they can return to the workplace.
- Contact Tracing uses the following outreach notifications:
  - An outreach notification to request that users in the workplace provide a list of users that they were in contact with throughout the day. The daily log notification can be scheduled and sent at a certain time every workday or as needed. Keeping daily logs enables contact tracers to follow up with impacted users when a user is affected.
  - An outreach notification to request that users review the organization's privacy policy and provide their consent to use their data for contact tracing.
  - An outreach notification to potentially exposed contacts in an exposure case to notify them that they might have been potentially exposed to an affected user at the workplace.

Note: Safe Workplace suite apps require a subscription. Install Emergency Outreach first, then install the Safe Workplace suite app.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Use with other Emergency Response Management applications

The Emergency Response Management applications, built on the ServiceNow AI Platform®, assist organizations in their emergency response efforts. With the Emergency Exposure Management application, you can identify users who might have been exposed to affected users. Through the Emergency Self Report application, users can self-report their health status. Managers can track the health status of their direct reports so that work can be reassigned and response teams can monitor the overall data and trends. Both applications are available in the ServiceNow Store.

Emergency Response Management for federal customers

Federal customers using IL4 or FedRAMP environments will see the Emergency Response Management applications ready and available to install on their instances without having to make any special requests. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

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Installation instructions for self-hosted and federal environments

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On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

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Install Emergency Outreach

You can install Emergency Outreach if you have the admin role.

Before you begin

Role required: admin

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Installation instructions for self-hosted and federal environments

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On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

About this task

After you install Emergency Outreach, no additional administration configuration is required. Optionally, you can configure notifications and response messages.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Emergency Outreach`.
3. Click **install**.

   The Application installation dialog box opens.
4. **Optional:** Load the demo data by selecting the **Load demo data**check box.

   (Optional) For information about how to install or reinstall demo data after the initial installation, see the Work around to install demo data if application is already installed [KB0722909] article in the Now Support Knowledge Base.
5. Click **install**.
6. When the installation is complete, click **Close**.

Result

Emergency Outreach is installed on your instance.

What to do next

Optionally install Employee Readiness Surveys to use with Emergency Outreach. The Employee Readiness Surveys app enables you to evaluate the readiness of your employees to return to the workplace using Emergency Outreach notifications.

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Install Employee Readiness Surveys to use with Emergency Outreach

You can install Employee Readiness Surveys if you have the admin role. Installing Employee Readiness Surveys adds notification options to the Emergency Outreach app. A default health readiness survey is provided as an example.

Before you begin

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

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About this task

The Send Outreach form in Emergency Outreach has an option to send a survey instead of a health status request. Users with the sn_imt_checkin.checkin_admin role become owners of the example health readiness survey.

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Employee Readiness Surveys`.
3. Select **install**.

   The Application installation dialog box opens.
4. **Optional:** Load the demo data by selecting the **Load demo data**check box.

   (Optional) For information about how to install or reinstall demo data after the initial installation, see the Work around to install demo data if application is already installed [KB0722909] article in the Now Support Knowledge Base.
5. Select **install**.
6. When the installation is complete, select **Close**.

Result

Employee Readiness Surveys is installed on your instance. Use it by navigating to the Emergency Outreach app.

Components installed with Emergency Outreach

Several types of components are installed with Emergency Outreach, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Emergency Outreach roles

Role title [name]	Description	Contains roles
Emergency Outreach admin [sn_imt_checkin.checkin_admin]	Can create a new Emergency Outreach notification and view the responses received from the user. Can create and manage Safe Workplace audiences. The Employee Readiness Core app must be installed.	survey_creator

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Tables installed

Emergency Outreach tables

Table	Description
Emergency Outreach [sn_imt_checkin_employee_check_in]	Define the audience and the notification content to send to the users.
Outreach Acknowledgements [sn_imt_checkin_check_in_acknowledgement]	Define the outreach acknowledgement record and the response received from a user.
Response Options [sn_imt_checkin_response_option]	Define the responses that appear in the notification message to users.
Emergency Outreach Channels [sn_imt_checkin_channels]	Create notification channels using a script or subflow, such as for Slack or Facebook collaboration platforms.
Health Verification Acknowledgements [sn_imt_checkin_health_verification_acknowledgement]	Define the daily health verification acknowledgement record and the response received from a user. The table is available for use only if you also subscribe to ServiceNow® Employee Health Screening. The data of this table is displayed in the Health Verification Acknowledgements related list when you send the Daily Health Verification outreach notification to employees.
Emergency Outreach Notification Channels [sn_imt_checkin_m2m_channel_employee_check_in]	Contains records connecting Emergency Outreach notifications with the notification channel used when it was sent.
Outreach Sysauto Script [sn_imt_checkin_outreach_sysauto_script]	Contains scheduled jobs for sending outreach notifications, such as for daily contact logs from the Contact Tracing app.
Survey Instances [sn_imt_m2m_asmt_assessment_instance_checkin]	Associates outreach survey records with survey instances for better reporting.
Response Criteria [sn_imt_checkin_response_criteria]	Set of questions that determine whether the response script runs when an employee completes a survey based on the employee's answers to those questions.
Response Script [sn_imt_checkin_response_script]	List of all response scripts. Response scripts are used to automatically take actions based

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Emergency Outreach tables (continued)

Table	Description
	on employee responses to survey questions.
View Outreach Instance Logs [sn_imt_checkin_employee_check_in_log]	List of outreach surveys with information about their creation and the status of their survey instances.

Configure Emergency Outreach notifications

A user with the admin role can add email notifications to use for any of the apps that communicate using Emergency Outreach. Each app provides a default email notification as an example to help with planning a new notification.

Before you begin

Role required: admin and sn_imt_checkin.checkin_admin

About this task

The Emergency Outreach notification feature supports the following applications and base system outreach notifications.

- Emergency Outreach: Request employee response indicating health status.
- Employee Readiness Surveys: Send a survey link with questions to determine employee readiness to return to the workplace.
- Employee Health Screening: Request that employees acknowledge their health status verification each day before they can return to the workplace.
- Contact Tracing:
  - Schedule an email notification to request that employees in the workplace list other employees they were in contact with.
  - Schedule an email notification to request that employees review the organization's privacy policy and provide their consent to use their data for contact tracing.
  - Send an email notification to potentially exposed contacts in an exposure case to notify them that they might have been potentially exposed to an affected employee at the workplace.

Procedure

1. Add an email notification to customize the send conditions and notification content for an outreach.
2. Update the email notification used in the outreach notification.
3. Add a Safe Workplace audience for the employees to whom you want to send the notification.
4. Configure response options if an outreach requires them.
5. **Optional:** Create additional notification channels, such as Slack or Microsoft Teams through which you want to send notifications.
6. **Optional:** Add a survey such as the Employee Readiness survey to be sent with the outreach notification.

   (Optional) For information about selecting the survey, see .

   For information about creating a survey, see Survey administration and Survey designer.

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7. Configure and send outreach email, mobile, and SMS notifications to your employees.

> **Note:** SMS notifications are available only for outreach acknowledgments and daily health verifications.

Add email notifications for use with Emergency Outreach

Add an email notification to customize the send conditions and notification for your employees and use it in place of the default notification for an Emergency Outreach notification.

Before you begin

Review the default email notification to familiarize yourself with the way that the notification is laid out and scripted. Use the default notification details to prepare the information to use for the notification that you're adding.

Default email notifications by application

Application	Notification name
Emergency Outreach	Employee Check-ins
Employee Readiness Surveys	Outreach Surveys
Employee Health Screening	Daily Health Verification
Contact Tracing	• Employee Daily Log Alert • User Privacy Consent • Notify Exposed Contact

Role required: admin

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Click **New**.
3. On the form, fill in the fields.

Notification form

Outreach notification	Required fields for configuring the email notification
Voluntary health check-in	**Table** field: Outreach Acknowledgements [sn_imt_checkin_check_in_acknowledgement] **When to send** tab: ○ **Send when**: Select **Record inserted or update** ○ **Conditions**: **[User.Active][is][true]** **[Notification count][changes]** and **[Sys id] [starts with]**
Outreach Surveys	**Table** field: Assessment Instance [asmt_assessment_instance]

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Outreach notification	Required fields for configuring the email notification
	When to send tab: ○ **Send when** field: Select **Event is fired** ○ **Event name** field: Select **sn_imt_checkin.survey_instance_notify** ○ **Conditions**: **[Assigned to.Active][is][true]**
Daily Contact Log	**Table** field: Daily Log Acknowledgements [sn_imt_tracing_daily_log_acknowledgement] **When to send** tab: ○ **Send when**: Select **Record inserted or update** ○ **Conditions**: **[User.Active][is][true]** and **[Acknowledgment Status][is not][Acknowledged]**
User Privacy Consent	**Table** field: User Privacy Notice and Consents [sn_imt_tracing_user_privacy_consent] **When to send** tab: ○ **Send when**: Select **Record inserted or update** ○ **Conditions**: **[Parent consent][is empty]** and **[Consent status][is][Not Acknowledged]** and **[Notification count][changes]** and **[Notification count][greater than or is][1]** and **[User.Active][is][true]** and **[Emergency Outreach.Email notification][is][true]**
Notify Exposed Contact	**Table** field: Exposure Notice [sn_imt_tracing_exposure_notice] **When to send** tab: ○ **Send when**: Select **Record inserted or update** ○ **Conditions**: **[User.Active][is][true]** and **[Notification count][changes]**
Daily Health Verification Outreach	**Table** field: Health Verification Acknowledgements [sn_imt_checkin_health_verification_acknowledgement] **When to send** tab:

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Outreach notification	Required fields for configuring the email notification
	○ **Send when**: Select **Record inserted or update** ○ **Conditions**: **[User.Active][is][true]** and **[Acknowledgment Status][is not][Acknowledged]**

4. In the **Advanced condition** field, enter the code to associate the email notification with the corresponding outreach notification.
   - For the Outreach Surveys notification:

```
var checkInSysId = event.getValue('parm1');
var checkInGr = new
 GlideRecord('sn_imt_checkin_employee_check_in');
checkInGr.get(checkInSysId);
var thisNotificationSysId = '<your-sys_id>';
answer = checkInGr.getValue('notification') ===
 thisNotificationSysId && checkInGr.email_notification;
```

   - For other outreach notifications:

```
var thisNotificationSysId = '<your-sys_id>'
answer = current.employee_check_in.notification =
 thisNotificationSysId;
```

   Replace the <your-sys_id> variable with the sys_id of the notification that you're adding. To do so, right-click in the header, select the **Copy sys_id** option, and paste the sys_id into the code line.
5. In the **Who will receive** tab, select the audience to whom the notification will be sent.
   You can also select the target audience while configuring or sending the associated outreach notification. For more information, see Send notifications for an emergency.
6. In the **What it will contain** tab, enter the subject and text of the email message.
   Clear the email template if it does not apply to your outreach notification or you have defined the email content in the corresponding outreach notification.
7. Click **Submit**.
8. In the Notifications list, open the notification that you added and click **Preview Notification**.
9. Review the notification and modify as necessary.
10. Click **Update**.

Modify notifications used with Emergency Outreach

The administrator can modify email notifications used with Emergency Outreach.

Before you begin

Review the details about planning for, creating, and modifying system notifications by starting with Create an email notification.

Role required: admin

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Procedure

1. Navigate to **All** > **Emergency Outreach** > **Send Outreach**, and then select the Content configuration tab.
2. In the **Response Mode** field, select the mode of the outreach notification to change.
   The default notification for that response mode appears. If it does not appear, search for the notification by name and select it.

Default email notifications by application

Application	Notification name
Emergency Outreach	Employee Check-ins
Employee Readiness Surveys	Outreach Surveys
Employee Health Screening	Daily Health Verification
Contact Tracing	○ Employee Daily Log Alert ○ User Privacy Consent ○ Notify Exposed Contact

3. Click the preview icon ( ) beside the **Notification** field, and then click **Open record**.
4. In the notification record, modify the details of the notification.
   Follow the requirements for the particular notification for the application. To review the requirements for each application, see Add email notifications for use with Emergency Outreach.
5. Click **Preview Notification** and verify your changes.
   Ensure that the information required in the notification is correct and the links are valid.
6. When you're finished, click **Update**.

Result
The modified notification is used for future outreach notifications for the corresponding application.

Add a Safe Workplace audience for Emergency Outreach

Add a collection of users for Emergency Outreach notifications. Target specific users based on criteria such as location, department, or group.

Before you begin
The Safe Workplace audience feature is available if you have purchased Employee Readiness Core.

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Safe Workplace Audience** and click **New**.
2. In the **Name** field, enter a descriptive name for the audience.

   Example
   For example, `Building C Network Group` or `Facilities employees reporting to Bob`.
3. Indicate the users who should receive notifications.

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Method	Action
Add users manually	Select the users that you want to add to the audience in the **Users** field.
Upload a spreadsheet of users	Select the link to add a file in the **Upload file** field. The header of the first column of the spread sheet must be `user_name` if you upload a list of user IDs or `email` if you upload a list of email addresses. **Note:** If you have more than 500 en tries, split the spreadsheet into multiple files.
Use additional criteria based on common User [sys_user] table fields	**a.** Select values for the **Groups**, **Roles**, **Com panies**, **Locations**, or **Departments** fields. **b.** Select a value in the **Audience criteria** field. ▪ Include all of the users listed in the Users field and any additional users who fulfill at least one of the other criteria by select ing **Any of the criteria (OR)**. ▪ Include only users who fulfill all select ed criteria by selecting **All the criteria (AND)**. Any users listed in the **Users** field are included in the audience only if they also fulfill all the additional criteria.
Enter conditions in the condition builder	**a.** Either retain the default setting of the User [sys_user] table or select a different table and select a column in that table to view its fields. The condition builder lists fields based on your selection. Scroll to the bottom of the list and select **Show related fields** to view fields from related tables. The number of users that the audience will contain is shown below the **Audience crite ria** field. As you add criteria, check this num ber to ensure that users are added and fil tered as you intend.

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Method	Action
	b. Create the condition. For example, you could specify one floor of a particular building or users who report to a particular manager.

4. Select **Submit**.

Configure Emergency Outreach response options

Configure the response options that employees choose from to respond to an Emergency Outreach health status request. You can modify the base system responses, add new responses, and deactivate responses you no longer use.

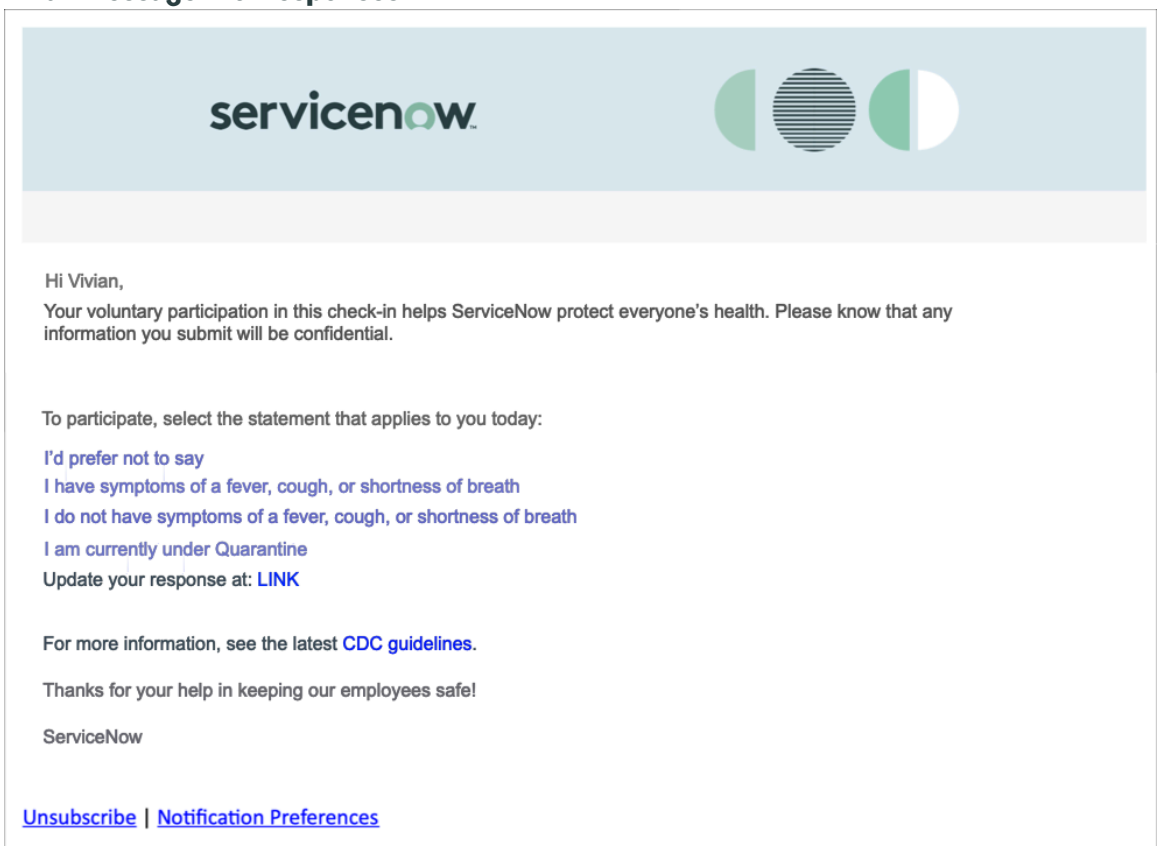
Before you begin

Role required: sn_imt_checkin.checkin_admin or admin

About this task

Response options appear in the Emergency Outreach email notification that employees receive.

Email message with responses



Procedure

1. Navigate to **All** > **Emergency Outreach** > **Response Options**.
2. **Optional:** Change the text of a response option.

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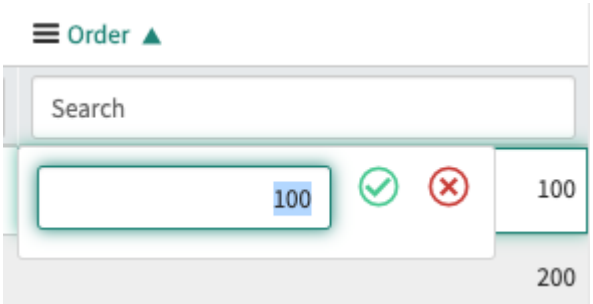
a. Open the response option.

b. Edit the text in the **Response text** field.

c. Click **Update**.

3. **Optional:** Change the order in which response options appear.
The easiest way to change the order is to use the list edit feature in the list of response options. You can also open each option to update the order number. Responses appear in numerical order.

a. In the **Order** list, double-click the order value to update.



b. Enter the number and click the green check mark icon.

c. Verify that the responses appear in the appropriate order by clicking the **Order** column header until it is sorted in descending order.

4. **Optional:** Add a response option.

a. In the Response Options list, click **New.**

b. Fill in the fields.

Form fields

Field	Description
Response text	The text the user can select as a response.
Order	The number that specifies the position of this response in the list. To put the new response: ▪ First, give it the lowest number. ▪ In the middle, give it a number between the numbers of the responses above and below. ▪ At the end, give it the latest number.
Response value	Read-only, unique value based on the response text.
Active	Option for ensuring that this response option appears in the notification.
SMS Option	The number a user selects to reply to an SMS notification with this response. Every SMS option must have a unique number.

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Field	Description
	Note: Assign a number if your company will use this response in SMS notifications.
Response mode	The mode of the outreach notification, such as Outreach Acknowledgements.

c. Click **Submit**.

5. **Optional:** Deactivate a response option by clearing the **Active** check box and clicking **Update**.

Create an Emergency Outreach notification channel

Create a notification channel to send health status requests using your company's preferred communication method, such as the Slack or Microsoft Teams collaboration platforms. Create the notification channel using a script or a subflow.

Before you begin

Role required: sn_imt_checkin.checkin_admin or admin

About this task

After you create a notification channel, you can select the channel when sending a notification. The channel uses the specified subject and body, and sends notifications to the users that you select when you send the health status request.
For example, your company's IT network group has a Slack channel that they monitor more closely than email. Create a Slack notification channel. To communicate with IT network group members, select the group as the target audience and select the Slack notification channel.

If the **Email notification** and **Now Mobile Push notification** check boxes are selected, all three notifications are sent. To use only the Slack notification channel, clear these two check boxes.

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Channels**.
2. Click **New**.

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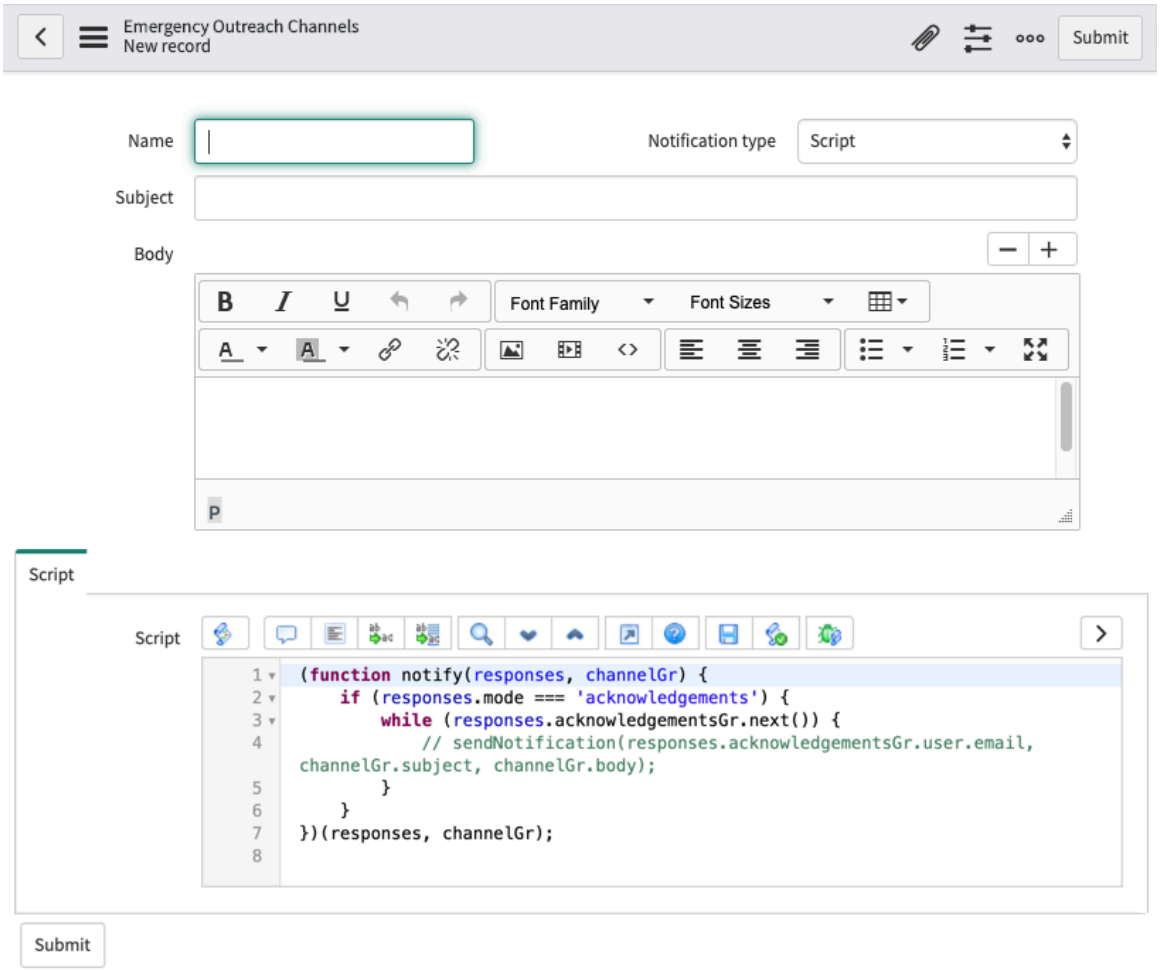

3. Enter the name of your notification channel.
   Use a short name that indicates the communication method to make it easy for the requester to pick the correct channel.
4. In the **Subject** field, enter the subject of your notification channel.
5. In the **Body** field, enter the body message.
6. Create a script notification channel.

   a. In the **Notification type** field, leave the default notification type of **Script**.

   b. In the **Script** field, replace the code in the comment with the script to connect to your channel.

   Example

```
{
            //
 sendNotification(responses.acknowledgementsGr.user.email,
channelGr.subject, channelGr.body);
        }
```

   For information about JavaScript APIs for GlideRecord, see GlideRecord - Scoped.

   c. Click **Submit**.

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Example

The following example includes code to count the number of acknowledgements and survey instances generated when the notification is sent. It displays the number of acknowledgements and survey instances that succeeded. Use this information to review and handle errors that appear in the Delivery Log related list in the Outreach record.

```
(function notify(responses, channelGr) {
    var record = responses.mode === 'acknowledgements'
        ? responses.acknowledgementsGr
        : responses.surveyInstancesGr;
    var totalCount = record.getRowCount();
    var numSent = 0;
    while (record.next()) {
        try {
            // sendNotification(record.user.email,
 channelGr.subject, channelGr.body)
            numSent += 1;
        } catch (err) {
            gs.error('Error occurred: ' + err.message);
        }
    }
    return { total_count: totalCount, sent_count: numSent };
})(responses, channelGr);
```

7. Create a subflow notification channel.

   a. Create a subflow to use in the outreach notification.
   For information about creating, publishing, and testing subflows, see Subflows.

   Use the following inputs in the subflow that you create:

   - *mode* (string)
   - *akcnowledgements* (Records of sn_imt_checkin_check_in_acknowledgement)

     If the mode is *acknowledgements*, then acknowledgements are set to a valid GlideRecord and *survey_instances* is `null`.

   - *survey_instances* (Records of asmt_assessment_instance)

     If the mode is *survey_instances*, then survey_instances is set to a valid GlideRecord and *acknowledgements* is `null`.

   - *channel* (Reference of sn_imt_checkin_channels)

   The following outputs are optional:

   - *total_count* (integer)
   - *sent_count* (integer)

   To review these outputs, include the number of total acknowledgements or surveys versus the successful acknowledgements or surveys.

   b. Select the **Subflow** notification type.

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The Script section changes to Flow, and the **Subflow** reference field appears.

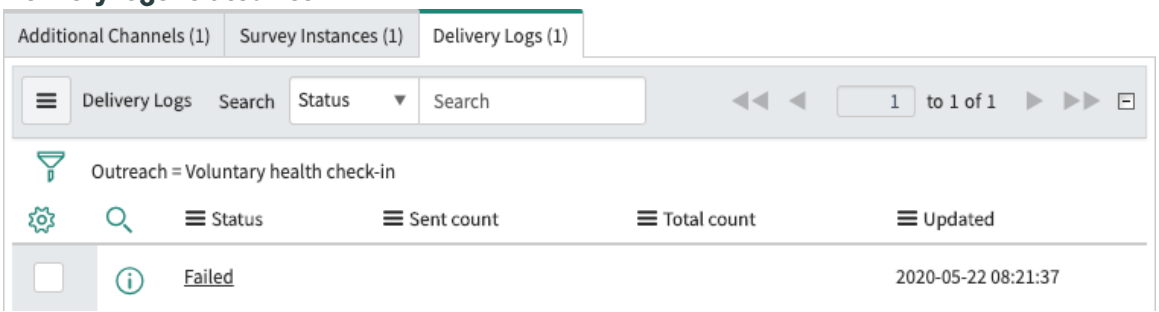
c. Select the subflow that you created.

8. Click **Submit**.

Trouble?

When an outreach is sent using a custom notification channel, a Delivery Logs related list appears in the Outreach message.

Delivery logs related list



1. Test the notification channel for an outreach message, and open the failed record to review the error message.
2. Fix errors that caused the notification to fail.
3. Continue testing the notification channel until it no longer fails.

Example: Slack channel script

Note: The following script is for reference only. Refer to it when you develop a notification channel script for your environment.

```
(function notify(responses, channelGr) {
    var createClient = function () {
        var client = new sn_ws.RESTMessageV2();
        client.setRequestHeader('Authorization', 'Bearer
 xoxb-222222222222-1111111111111-00000000000000000000000');
        client.setRequestHeader("Accept", "application/json");
        client.setRequestHeader('Content-type',
 'application/json');
        return client;
    };

    var getEmailToSlackIdMap = function (users) {
        var emailToSlackIdMap = {};
        for (var i = 0; i < users.length; i++) {
            var email = users[i].profile.email;
            if (email) {
                emailToSlackIdMap[email] = users[i].id;
            }
        }
        return emailToSlackIdMap;
    };
```

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```
    var runSlackCommand = function (method, params) {
        var client = createClient();
        client.setHttpMethod('post');
        client.setEndpoint('https://slack.com/api/' + method);
        client.setRequestBody(JSON.stringify(params));
        var response = client.execute();
        if (response.getStatusCode() < 200 ||
 response.getStatusCode() > 299) {
            throw new Error('Failure running ' + method + ':\n'
 + response.getBody());
        }

        var body = JSON.parse(response.getBody());
        if (!body.ok) {
            throw new Error(body.error);
        }

        return body;
    };

    var sendMessage = function (userId, message) {
        var openConversationResponse =
 runSlackCommand('conversations.open', { users: userId });
        var channel = openConversationResponse.channel.id;
        runSlackCommand('chat.postMessage', { channel: channel,
 text: message });
    };

    var users = runSlackCommand('users.list').members;
    var emailToSlackIdMap = getEmailToSlackIdMap(users);
    var body = channelGr.getValue('body') || '<p></p>';
    var record = responses.mode === 'acknowledgements' ?
 responses.acknowledgementsGr : responses.surveyInstancesGr;
    var numSent = 0;

    while (record.next()) {
        var email = record.user.email + '';

        var link = responses.mode === 'acknowledgements'
            ? gs.getProperty('glide.servlet.uri') +
 record.getLink(true)
            : gs.getProperty('glide.servlet.uri') +
 'sp?id=take_survey&instance_id=' + record.getUniqueValue();

        var message = body + '\n' + link;

        var slackId = emailToSlackIdMap[email];
        if (slackId) {
            sendMessage(slackId, message);
            numSent += 1;
        }
    }

    return { sent_count: numSent };
})(responses, channelGr);
```

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Modify or add Employee Readiness Surveys

Review the Employee workplace readiness survey that is installed with the Employee Readiness Surveys app. Modify the survey, or create one or more surveys to use based on the readiness concerns that you want to address and any legal obligations under applicable law, including data protection laws.

Before you begin

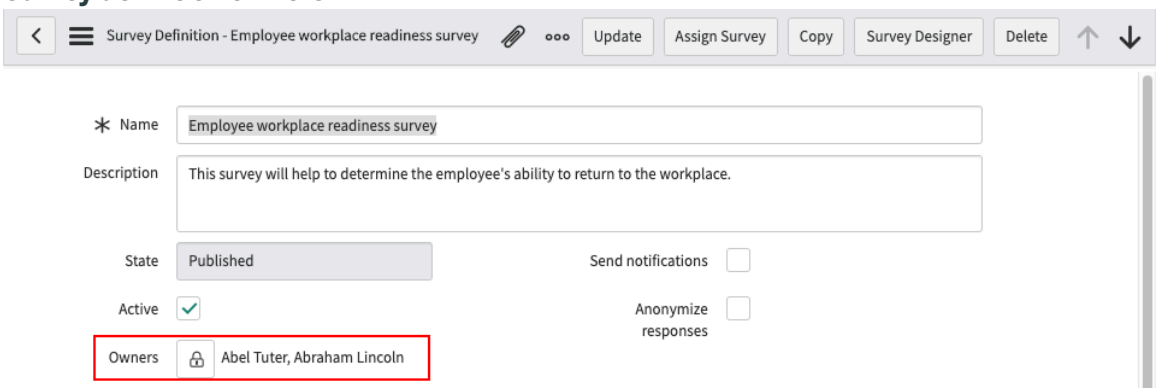
Familiarize yourself with Survey administration. Then meet with other emergency response team stakeholders to plan the changes to the survey. Decide whether to edit the existing survey before you send it to employees, or to create one or more new surveys.

Role required: sn_imt_checkin.checkin_admin, survey_creator, survey_admin, or admin

About this task

Users with the sn_imt_checkin.checkin_admin role have the survey_creator role, and are made owners of the default readiness survey. Users with the survey_creator role can edit or copy the default survey. These users can also add another readiness survey and add other users as owners to collaborate with them.

Survey definition owners



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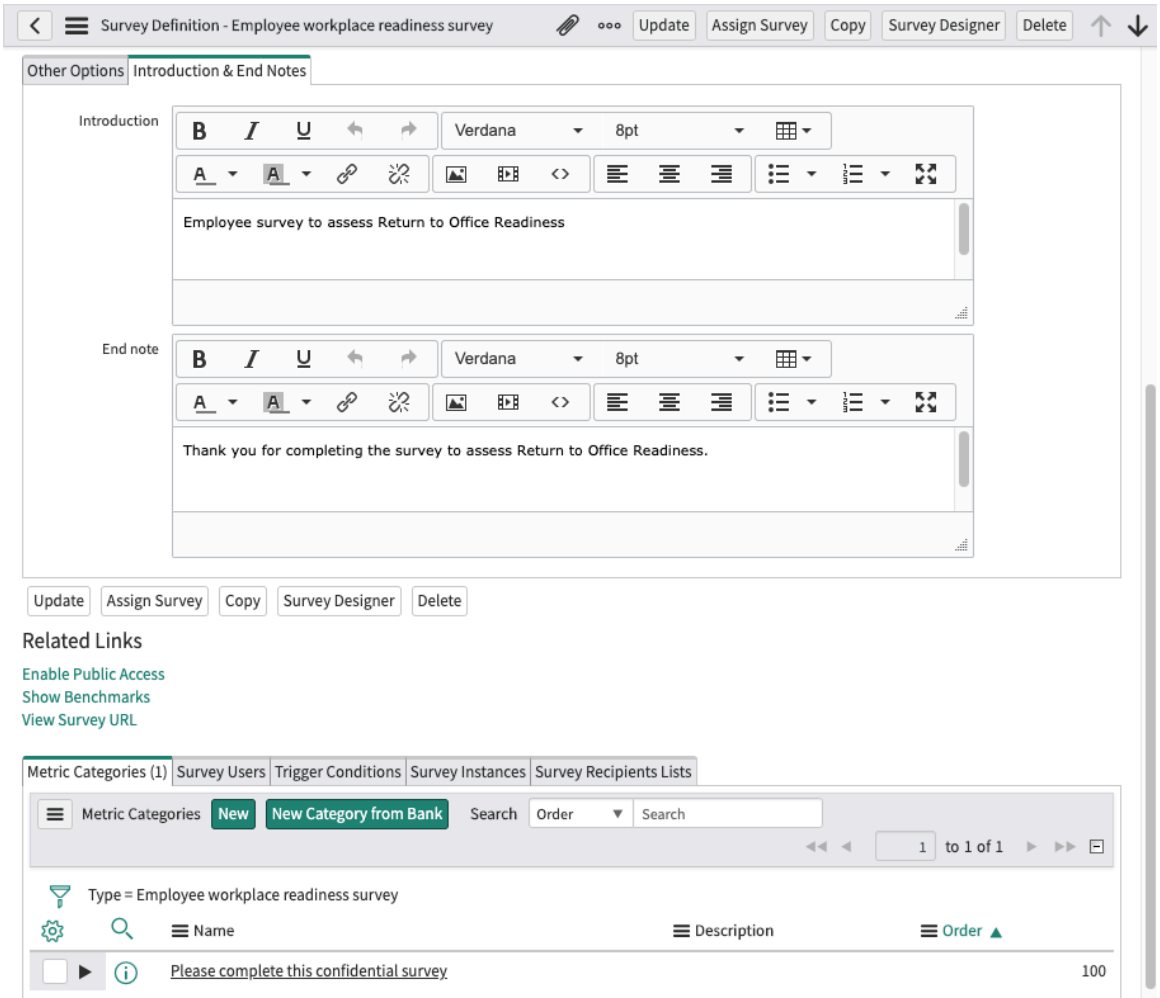
Procedure

1. Navigate to **All** > **Surveys** > **View Surveys** and open the **Employee workplace readiness survey**.



2. Using the plan that you made for changing the survey, update any of the following survey elements.

Option	Description
Add owners	Select the lock icon ( ) beside **Owners** to unlock the list of survey owners. Add the user to collaborate with on this survey.
Update the introductory and ending text	Select the Introduction & End Notes section tab and update the text.
Work with the questions	**a.** In the Metric Categories related list, select **Please complete this confidential survey**. Questions appear in the Assessment Met rics related list. **b.** Select the question to open the Survey Question form. Modify and complete your edits. The answers are listed in the Assess ment Metric Definitions related list.

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Option	Description
Work with the question responses	In the Assessment Metric Definitions related list, select the response to edit. Update the response as desired.

3. Complete any other changes to the survey options, and select **Update**.

Result
The modified survey is used for future outreach surveys.

Add additional Employee Readiness Surveys

Create one or more surveys to use for different workplaces or to evaluate other areas of concern. Start by planning the surveys carefully to gather the best data for your evaluation of readiness to return to the workplace.

Before you begin
Role required: sn_imt_checkin.checkin_admin, survey_creator, survey_admin, or admin

About this task
Consider how you want to begin to reopen your workplace, and what you must understand about the employees before you can begin. Work with a user with the survey_admin role in your company to plan the types of questions and responses for the survey. For information about adding surveys, see Survey administration and Survey designer.

Procedure

- To create a survey, navigate to **Surveys** > **View Surveys**.
- Select **New** or **Survey Designer** and enter the information to complete the survey from the plan that you made.
  Decide on a naming convention to use for surveys, so that a user with the sn_imt_checkin.checkin_admin role knows which one to select when sending outreach surveys. For example, **Readiness survey India** or **Customer service employees return readiness**.

Related topics

Send a readiness survey in Emergency Outreach

Send notifications for an emergency

Use Emergency Outreach to notify users to report their health status. Use Emergency Outreach also to quickly notify users of important information if there is an emergency.

Before you begin
Users must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Note the following requirements to be able to send and receive SMS notifications:

- Your company must have a Safe Workplace suite subscription and Employee Readiness Core installed.
- Your company must have a Twilio account and phone number.
- The Notify plug-in and the Notify-Twilio Direct driver must be enabled.
- The Label for your number in **Notify** > **Messages** must be set to **Outreach**.

For more information on configuring Notify and the Notify-Twilio Direct driver, see Notify.

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Role required: sn_imt_checkin.checkin_admin or admin

About this task

Emergency Outreach is available in the ServiceNow Store without a subscription. The base system provides a notification that requests a response from the recipient regarding their health status. The responses are stored as outreach records and the health status is updated each time the user responds with a change.

Some of the Safe Workplace suite apps leverage the Emergency Outreach notification feature to communicate with users. The Safe Workplace suite apps provide more flexible functions than using Emergency Outreach as a standalone app.

- Employee Readiness Surveys provides notification with a survey link to assess user readiness to return to the workplace.
- Employee Readiness Core provides the ability to use Safe Workplace audiences to simplify the selection of recipients for an outreach.
- Employee Health Screening: Request that users acknowledge their health status verification each day before they can return to the workplace.
- Contact Tracing supports these outreach notification needs:
  - A scheduled notification for returning users to fill out a daily contact log.
  - A request to review the organization's privacy policy and provide consent to use their contact tracing data.

The following procedure is applicable to the use of Emergency Outreach as a standalone app or with Safe Workplace suite applications.

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Send Outreach**.
2. Enter a name that describes the purpose of the outreach notification.

   Example
   For example, `Global health status check-in` or `London office health status check-in`.
3. **Optional:** In the **Description** field, describe the purpose for sending the outreach.
4. On the **When to run** tab, specify when the outreach should be sent.

Option	Action
To send the notification on demand	Keep the default **Mode** value of **None**. The outreach is sent when you select **Send Notification**.
To schedule the notification	**a.** Set the mode to **Scheduled**. **b.** In the **Run** field, indicate how often the outreach should be sent. The options are **Daily**, **Weekly**, **Monthly**, or **Once**. ▪ For daily outreaches, enter the time that you want to send the outreach. You can specify hours, minutes, and seconds. For example, enter `17 : 30 : 00` to send the outreach at 5:30 p.m. If you don't want the outreach to be sent on certain days of the week, select those days in the **Exclude** field. ▪ For weekly outreaches, select the day of the week and the time you want to send the outreach.

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Option	Action
	▪ For monthly outreaches, select the day of the month and the time you want to send the outreach. If you select a day that does not exist in all months, for example 31, the outreach will run on the last day of the month. ▪ For outreaches that are only sent once, schedule the date and time that you want to send the outreach in the **Starting** field. **c.** (Optional) To send the outreach based on the time zone set in the user profile, select the **Send in local time** check box. The outreach messages reference a send time based on the time zone of the user sending the notification. For example, if the sender is in the US Pacific time zone, an outreach sched uled to be sent at 4:30 p.m. shows a send time of 16:30:00 for users in that time zone and 18:30:00 (6:30 p.m.) for users in the US Central time zone because the Pacific time zone is two hours earlier than the Central time zone.

Note:

In prior releases of Emergency Outreach, notification scheduling was configured by selecting **Schedule** and entering details in a pop-up window. Scheduling is now configured on the **When to run** tab.

Scheduled outreaches that you sent prior to upgrading provide the previous scheduling function if you need to resend it. This functionality provides the flexibility to set up new scheduled outreaches and to resend prior scheduled outreaches.

5. To identify who will receive the outreach, perform one of the following actions.

Installed apps	Action
Emergency Outreach standalone	On the **Select targeted audience** tab, select the combination of users to send the outreach notification to. Choose from user lists, groups, departments, locations, or other search filters such as building, cost center, or country code. For more information, see Add a Safe Workplace audience.
With Safe Workplace	On the Safe Workplace Audience tab, select the name of the audi ence to send the outreach notification to.

6. Click **Save**.
   The outreach details are saved and related lists appear. The Additional Channels related list is used to specify additional custom channels to use when you send the notification. Other related lists are filled in with outreach recipients and their status after you send the notification.
7. Click the **Content configuration** tab and leave the default response mode **Outreach Acknowledgements**.
8. On the **Content configuration** tab, specify how to send the outreach notification.

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Option	Action
Disable the email notification	Clear the **Email** check box.
Select a different notification	Click the lookup icon () and select the notification to use.
Review and edit the introductory message	Modify the subject and body as desired. The default message template asks users to submit their health status regarding infectious diseases, such as COVID-19. The user selects a response from a list of possible responses.
Send a mobile push notification	**a.** Select the **Now Mobile Push Notification** check box. The check box is active if the ServiceNow NowMobile App Screens and Applet Launcher [com.glide.mobile-employee] is activated. The push notification content appears when the check box is active, and you can modify it. **b.** Modify the push message text as desired. Push notifications use the ServiceNow Request Application notification device. When mobile application is registered to an instance, this notification device is automatically created in the user's notification preferences. Ensure that this device is active for the users that you want to receive the push notification.
Send an SMS notification	**a.** Select the **Message via SMS** check box. **b.** Modify the SMS message text. **Note:** For existing outreaches, if **Message via SMS** is selected, the **SMS message** is not autopopulated. **c.** Click **Save**. SMS reply options are dynamically populated from the Response Options [sn_imt_checkin_response_option] table.
Use a custom notification channel	**a.** Click the Additional Channels related list, click **Edit**, and move the channel to the Additional Channels List. **b.** Click **Save**. If the **Email notification**, **Now Mobile Push notification**, and **Message via SMS** check boxes are selected, all four notifications are sent. To use only the custom notification channel, clear these three check boxes.

9. Click **Send Notification**.
   The notification is sent immediately or at the time specified on the **When to run** tab. As responses are received, they appear in the Outreach Acknowledgements related list.

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What to do next
Review the Emergency Outreach acknowledgements.

Related topics
- Add a Safe Workplace audience for Emergency Outreach
- Send an Outreach notification for the daily contact log
- Send an Emergency Outreach notification for employee privacy consents in Contact Tracing
- Send a readiness survey and view responses
- Send notifications for daily health verification

Review Emergency Outreach acknowledgements

Review the list of acknowledgements from an outreach notification to see each employee's status. Resend the outreach notification to employees who did not respond.

Before you begin
Role required: sn_imt_checkin.checkin_admin or admin

Procedure
1. Navigate to **Emergency Outreach** > **View Outreaches** and open the outreach notification to view.
   Responses are listed in the Outreach Acknowledgements related list. As employees respond to the notification, their records are updated with their status and whether they responded by email, mobile, or SMS.



   If employees haven't responded yet, click **Resend Notification**. The notification is sent again only to employees who have not yet responded.

   Note: If employees update their status in a subsequent email, the employee's record is updated in the original event and in the dashboard. Employees cannot change their status through mobile push notifications.

Trouble?

When an outreach is sent using a custom notification channel, a Delivery Logs related list appears in the outreach record. It lists successful and failed log records for the notification that you sent.

Depending on how the notification channel was created, success messages can show the number of notifications that were successfully sent, and the total number of notifications that were requested. If the total count is higher than the sent count, the difference is the number of notifications that failed.

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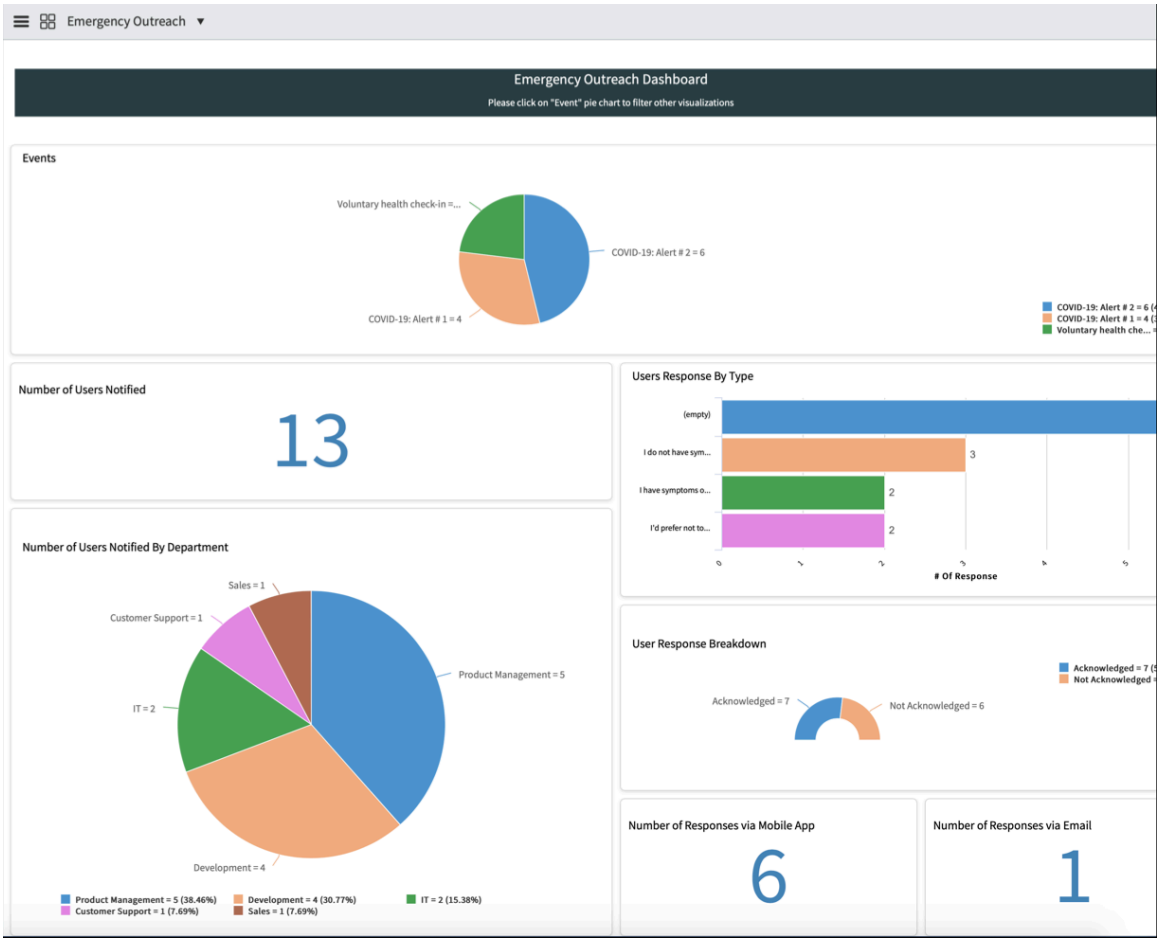
Open the record and investigate the cause of the errors. Correct the cause of the failures, or use another notification method for the users whose notification was not sent.

2. **Optional:** View the Emergency Outreach dashboard, which summarizes data from employee notification events.
   a. Navigate to **Emergency Outreach** > **View Dashboard**.
   b. Review the accumulated notification data and trend.
   c. Click an event in the **Events** pie chart to show its data.



Send notifications for daily health verification

Use Emergency Outreach to notify users to report their daily health status.

Before you begin

Users must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Note the following requirements to be able to send and receive SMS notifications:

- Your company must have a Safe Workplace suite subscription and Employee Readiness Core installed.
- Your company must have a Twilio account and phone number.
- The Notify plug-in and the Notify-Twilio Direct driver must be enabled.
- The Label for your number in **Notify** > **Messages** must be set to **Outreach**.

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For more information on configuring Notify and the Notify-Twilio Direct driver, see Notify.

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Send Outreach**.
2. Enter a name that describes the purpose of the outreach notification.

   Example
   For example, `Global daily health verification` or `London office daily health verification`.
3. **Optional:** In the **Description** field, describe the purpose for sending the outreach.
4. On the **When to run** tab, specify when the outreach should be sent.

Option	Action
To send the notification on demand	Keep the default **Mode** value of **None**. The outreach is sent when you select **Send Notification**.
To schedule the notification	**a.** Set the mode to **Scheduled**. **b.** In the **Run** field, indicate how often the outreach should be sent. The options are **Daily**, **Weekly**, **Monthly**, or **Once**. ▪ For daily outreaches, enter the time that you want to send the outreach. You can specify hours, minutes, and seconds. For example, enter `17 : 30 : 00` to send the outreach at 5:30 p.m. If you don't want the outreach to be sent on certain days of the week, select those days in the **Exclude** field. ▪ For weekly outreaches, select the day of the week and the time you want to send the outreach. ▪ For monthly outreaches, select the day of the month and the time you want to send the outreach. If you select a day that does not exist in all months, for example `31`, the outreach will run on the last day of the month. ▪ For outreaches that are only sent once, schedule the date and time that you want to send the outreach in the **Starting** field. **c.** (Optional) To send the outreach based on the time zone set in the user profile, select the **Send in local time** check box. The outreach messages reference a send time based on the time zone of the user sending the notification. For example, if the sender is in the US Pacific time zone, an outreach scheduled to be sent at 4:30 p.m. shows a send time of 16:30:00 for users in that time zone and 18:30:00 (6:30 p.m.) for users in the US Central time zone because the Pacific time zone is two hours earlier than the Central time zone.

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Note:

In prior releases of Emergency Outreach, notification scheduling was configured by selecting **Schedule** and entering details in a pop-up window. Scheduling is now configured on the **When to run** tab.

Scheduled outreaches that you sent prior to upgrading provide the previous scheduling function if you need to resend it. This functionality provides the flexibility to set up new scheduled outreaches and to resend prior scheduled outreaches.

5. Identify who will receive the outreach notification through either the Emergency Outreach or Safe Workplace application.

App	Action
Emergency Outreach standalone	On the Select targeted audience tab, select the combination of users to send the outreach notification to. Choose from user lists, groups, departments, locations, or other search filters such as building, cost center, or country code.
Safe Workplace	On the Safe Workplace **Audience** tab, select the name of the audi ence to send the outreach notification to.

6. Click **Save**.
The outreach details are saved and related lists appear. You can use the Additional Channels related list to specify additional custom channels to use when you send the notification. Other related lists are populated with outreach recipients and their statuses after you send the notification.
7. Click the **Content configuration** tab and select the response mode **Daily Health Verification**.
8. On the **Content configuration** tab, specify how to send the outreach notification.

Option	Action
Disable the email notifica tion	Clear the **Email** check box.
Select a different notifica tion	Click the lookup icon () and select **Daily Health Verifica tion**.
Review and edit the intro ductory message	Modify the subject and body. The notification includes the link to the daily health verifica tion form that the user can submit in the instance or mobile app.
Send a mobile push notifica tion	**a.** Select the **Now Mobile Push Notification** check box. The check box is active if the ServiceNow NowMobile App Screens and Applet Launcher [com.glide.mobile-employ ee] is activated. The push notification content appears when the check box is active. **b.** Modify the push message text as desired.

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Option	Action
	Push notifications use the ServiceNow Request Application notification device. When mobile application is registered to an instance, this notification device is automatically created in the user's notification preferences. Ensure that this device is active for the users that you want to receive the push notifi cation.
Send an SMS notification	**a.** Select the **Message via SMS** check box. **b.** Modify the SMS message text as required. **Note:** For existing outreaches, if **Message via SMS** is selected, then the **SMS message** is not autopopulat ed. **c.** Click **Save**. A daily health verification link is not sent when you send an SMS notification. Users respond to the SMS message directly with their status. SMS reply options are dynamically populated from the Re sponse Options table [sn_imt_checkin_response_option].
Use a custom notification channel	**a.** Click the Additional Channels related list, click **Edit**, and move the channel to the Additional Channels List. **b.** Click **Save**. If the **Email notification**, **Now Mobile Push notification**, and **Message via SMS** check boxes are selected, all four notifica tions are sent. To use only the custom notification channel, clear these three check boxes.

9. Click **Send Notification**.
   The notification is sent immediately or at the time specified on the **When to run** tab. As responses are received, they appear in the Health Verification Acknowledgements related list. New records are created for each day in the Health Verification Acknowledgements related list for each user included in the target audience.

What to do next

Review the daily health verification acknowledgements. Resend the notification to users who have not responded for the day. If a user submits a response via a previous day notification, the status is updated for the notification of the latest date sent to the user.
For example, say you send the daily health notification to Zane from August 1 to August 10. If Zane uses the link in the notification sent on August 4, then the acknowledgement status for Zane is updated in the notification sent on August 10.

Related topics

Add a Safe Workplace audience for Emergency Outreach

Send an Outreach notification for the daily contact log

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Send an Emergency Outreach notification for employee privacy consents in Contact Tracing

Send a readiness survey and view responses

Review daily health verification acknowledgements

Review the list of acknowledgements from the daily health verification notification to see each user's status. Resend the outreach notification to users who did not respond.

Before you begin

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Emergency Outreach** > **View Outreaches**.
2. Open the Daily Health Verification outreach notification.
   Responses are listed in the Health Verification Acknowledgements related list. As users respond to the notification, their records are updated with their acknowledgements statuses.

   If users haven't responded yet, click **Resend Notification**. The notification is sent again only to users who have not yet responded.

   Note: If users submit their status in a subsequent email, the user's record is updated in the original event for the day.

   New records are created in the Health Verification Acknowledgements related list for each user included in the target audience. If a user submits a response through a previous day's notification, the response is updated for the latest date the user was sent the notification.

Send a readiness survey and view responses

Use Emergency Outreach to send a workplace readiness survey. Review the survey responses to assist with your plans to reopen your workplace.

Before you begin

In order to send a survey, you must have the Employee Readiness Surveys application installed.

Employees must have the Now® Mobile app installed on their phones to receive mobile push notifications. For more information, see Now Mobile app.

Role required: sn_imt_checkin.checkin_admin or admin

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Send Outreach**.
2. Enter a name that describes the purpose of the survey.

   Example
   For example, "San Diego readiness survey" or "Employee readiness Europe."
3. **Optional:** In the **Description** field, describe the purpose for sending the outreach survey.
4. On the **When to run** tab, specify when the outreach should be sent.

Option	Action
To send the notification on demand	Keep the default **Mode** value of **None**. The outreach is sent when you select **Send Notification**.

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Option	Action
To schedule the notification	**a.** Set the mode to **Scheduled**. **b.** In the **Run** field, indicate how often the outreach should be sent. The options are **Daily**, **Weekly**, **Monthly**, or **Once**. ▪ For daily outreaches, enter the time that you want to send the outreach. You can specify hours, minutes, and seconds. For example, enter `17 : 30 : 00` to send the outreach at 5:30 p.m. If you don't want the outreach to be sent on certain days of the week, select those days in the **Exclude** field. ▪ For weekly outreaches, select the day of the week and the time you want to send the outreach. ▪ For monthly outreaches, select the day of the month and the time you want to send the outreach. If you select a day that does not exist in all months, for example `31`, the outreach will run on the last day of the month. ▪ For outreaches that are only sent once, schedule the date and time that you want to send the outreach in the **Starting** field. **c.** (Optional) To send the outreach based on the time zone set in the user profile, select the **Send in local time** check box. The outreach messages reference a send time based on the time zone of the user sending the notification. For example, if the sender is in the US Pacific time zone, an outreach scheduled to be sent at 4:30 p.m. shows a send time of 16:30:00 for users in that time zone and 18:30:00 (6:30 p.m.) for users in the US Central time zone because the Pacific time zone is two hours earlier than the Central time zone.

Note:

In prior releases of Emergency Outreach, notification scheduling was configured by selecting **Schedule** and entering details in a pop-up window. Scheduling is now configured on the **When to run** tab.

Scheduled outreaches that you sent prior to upgrading provide the previous scheduling function if you need to resend it. This functionality provides the flexibility to set up new scheduled outreaches and to resend prior scheduled outreaches.

5. Identify who will receive the outreach notification through either the Emergency Outreach or Safe Workplace application.

App	Action
Emergency Outreach standalone	On the Select targeted audience tab, select the combination of users to send the outreach notification to. Choose from user lists, groups, departments, locations, or other search filters such as building, cost center, or country code.
Safe Workplace	On the Safe Workplace **Audience** tab, select the name of the audience to send the outreach notification to.

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6. Click **Save**.
   The survey outreach details are saved and related lists appear. The Additional Channels related list is used to specify additional custom channels to use when you send the survey notification. The Survey Instances related list is filled in with outreach recipients and their survey status after you send the notification.
7. Click the **Content configuration** tab, and in the **Response Mode** field, select **Survey**.
   Use the **Status** field that appears on the outreach form to confirm the creation status of your survey instances when you send the notification.
8. Select the survey to use or keep the default **Employee workplace readiness survey**.
9. To set a due date for the survey, enter a value in the **Duration** field.

   The **Duration** field sets the amount of time allowed to complete assigned survey instances, starting from the time that the survey instance is generated. The survey instances created for the outreach use the **Duration** field for their due date instead of the **Assessment duration** field on the survey.
10. Specify how to send the outreach notification.

Option	Action
Disable the email notification	Clear the **Email** check box.
Select the survey	Select the survey to use or keep the default **Employee workplace readiness survey**.
Select a different notification	Click the lookup icon () and select the notification to use.
Review and edit the introductory message	Modify the subject and body as desired. The notification includes the survey link that the employee can take in the instance or mobile app.
Send a mobile push notification	**a.** Select the **Now Mobile Push Notification** check box. The check box is active if the ServiceNow NowMobile App Screens and Applet Launcher [com.glide.mobile-employee] is activated. The push notification content appears when the check box is active, and you can modify it. **b.** Modify the push message text as desired. Push notifications use the ServiceNow Request Application notification device. When mobile application is registered to an instance, this notification device is automatically created in the user's notification preferences. Ensure that this device is active for the users that you want to receive the push notification.
Use a custom notification channel	**a.** Click the Additional Channels related list, click **Edit**, and move the channel to the Additional Channels List. **b.** Click **Save**. If the **Email notification** and **Now Mobile Push notification** check boxes are selected, all three notifications are sent. To

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Option	Action
	use only the custom notification channel, clear these two check boxes.

11. Click **Send Notification**.
    The notification and survey link are sent to the target audience. A survey instance is created for each recipient, with the status **Ready to take**.

    When you send the outreach survey notification, any open survey instances for the recipients are canceled. When you resend a notification for an outreach, the open survey instances are not canceled.

    If you have a recurring scheduled outreach, such as a survey that is sent daily or weekly, each time the outreach is sent, the open surveys from the previous day or week are canceled.

    You can't create an outreach survey notification if the survey is being used in a scheduled outreach notification.

    After the notification is sent, the Emergency Outreach Instance Logs related list is displayed. The **Instance creation status** field values match the status on the outreach form.

    - Success: An instance was created for every recipient in the target audience. The number of Assessment instances created should match the number of Target assessment instances or recipients of the survey.

    - Partial Success: An instance was created for some recipients in the target audience but not all of them. The number of Target assessment instances and Assessment instances created do not match.

      Send the notifications to users who did not receive a notification or instance by clicking **Send to Remaining**.

    - Failed: No instances were created and no surveys were sent.

      Resend the notification to all users by clicking **Send Notification** again.

12. To view survey instances, navigate to **Emergency Outreach** > **View Outreaches** and open the survey notification to view.

    Note: Users with the sn_imt_checkin.checkin_admin role can see all survey instances. Users who have been assigned the survey can see only their own survey instances.

    As employees complete the survey, the status updates in their survey instance.

    If employees haven't responded yet and instances were successfully created for all users, click **Resend Notification**. The notification is sent again only to employees who have not yet responded.

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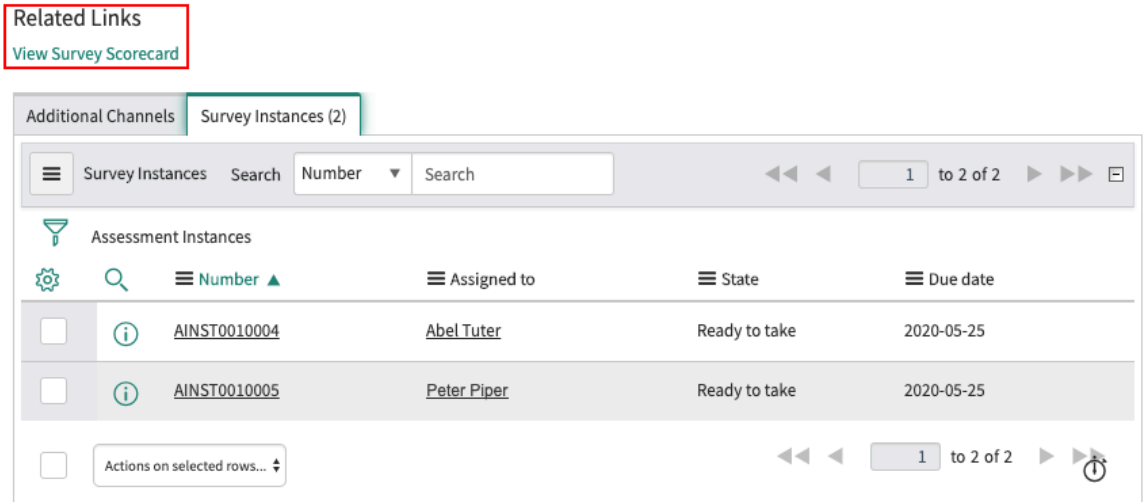

Trouble?

When an outreach is sent using a custom notification channel, a Delivery Logs related list appears in the outreach record. It lists successful and failed log records for the notification that you sent.

Depending on how the notification channel was created, success messages can show the number of notifications that were successfully sent, and the total number of notifications that were requested. If the total count is higher than the sent count, the difference is the number of notifications that failed.

Open the record and investigate the cause of the errors. Correct the cause of the failures, or use another notification method for the users whose notification was not sent.

13. To view the status of Outreach instances, navigate to **Emergency Outreach** > **View Outreach Instance Logs**.
14. To view the interactive scorecard showing all responses and the results, click the **View Survey Scorecard** related link.

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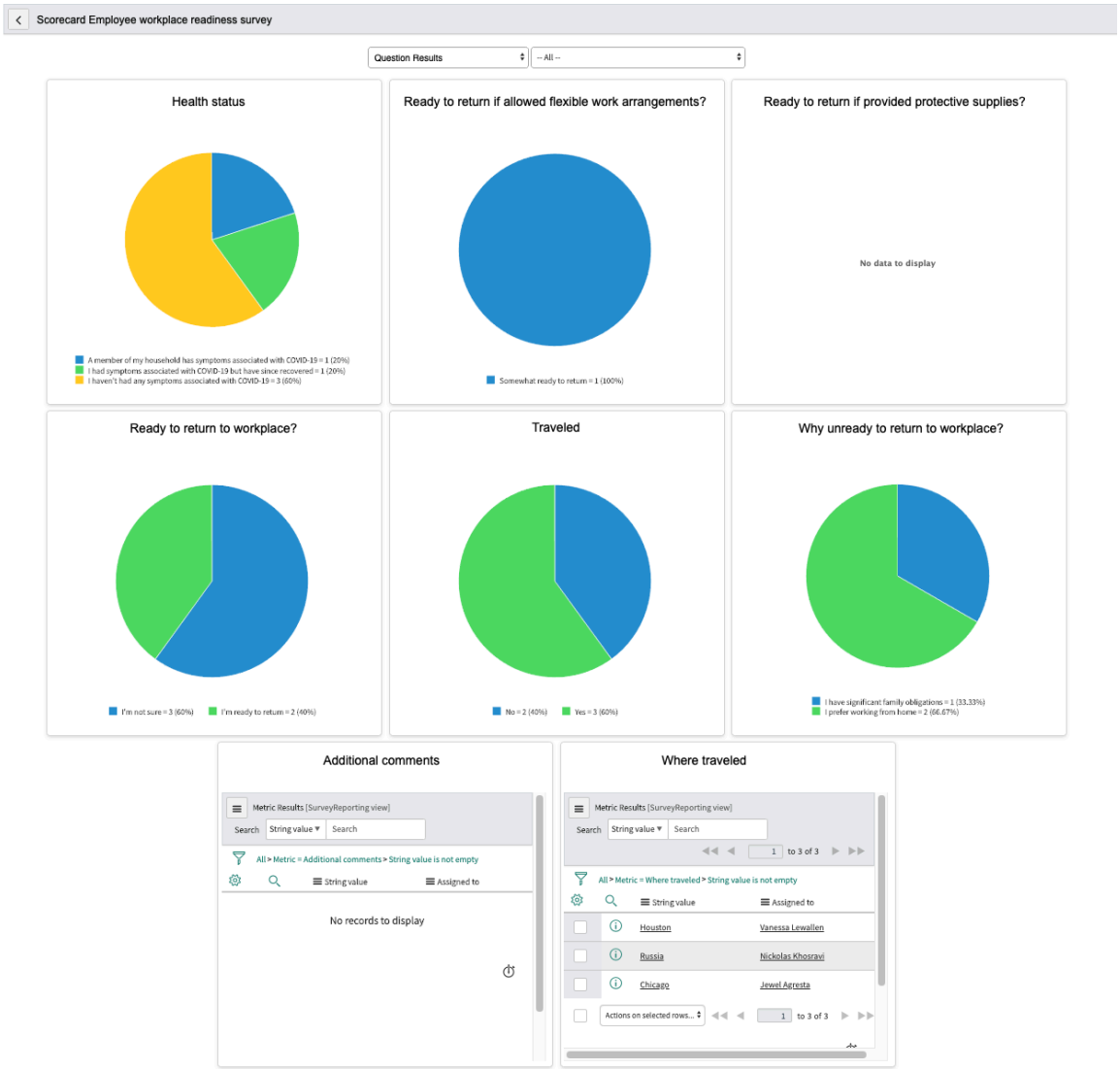

Click any area of a chart to see the corresponding records.

Report your health status

If you receive an email, mobile push notification, or SMS notification to report your health status, you can update your status from the message.

Before you begin

To receive mobile push notifications, you must have the Now® Mobile app.

Role required: none

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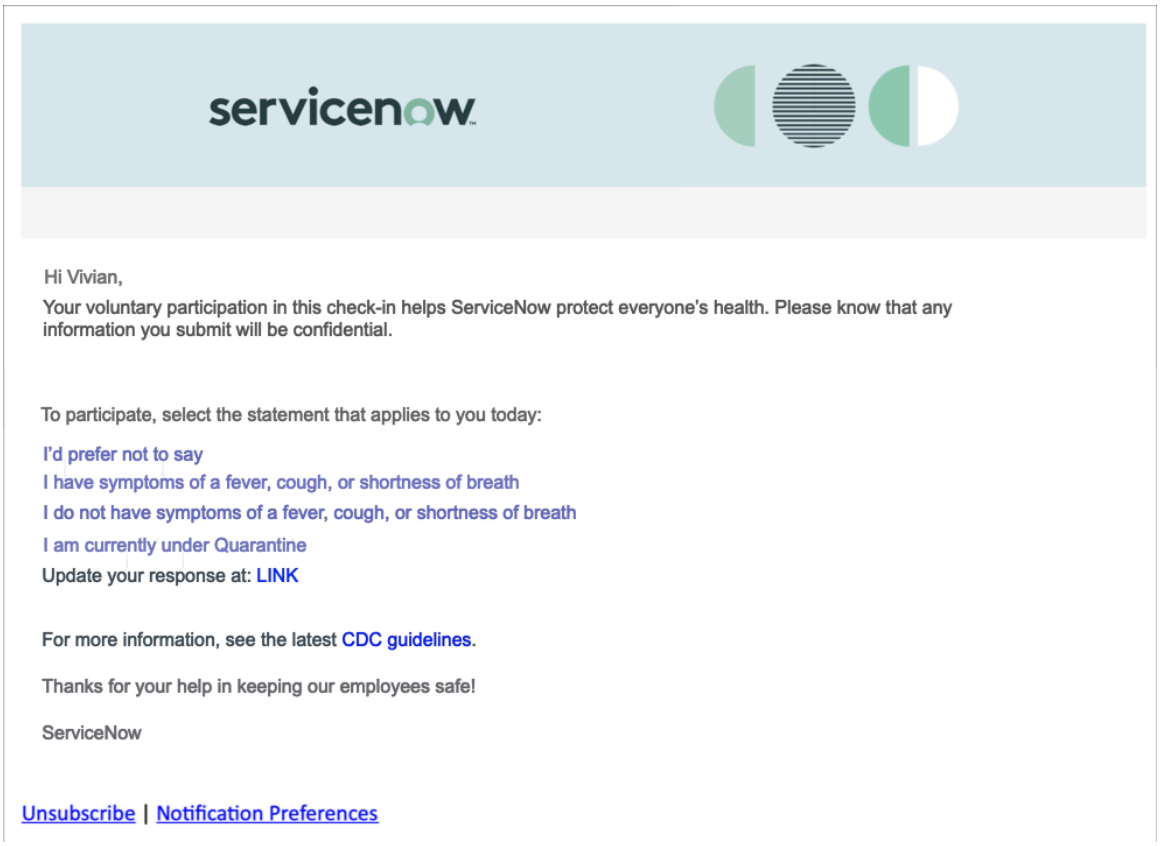
Procedure

- To reply to an email notification, select a response from the message and email it.

  Example



- To reply to a mobile push notification:
  1. Tap the notification to open the message.
  2. In the message, tap **Check In**.
  3. **Optional:** On the Check In screen, provide your location and additional comments.
  4. Tap **Status** and then select a response.

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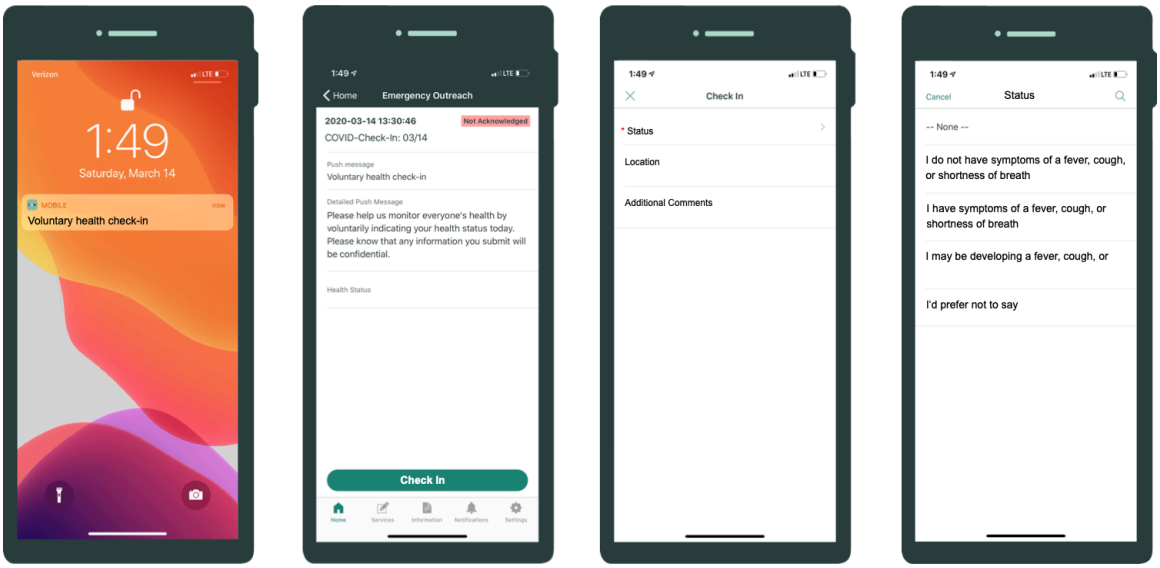
Example



- To reply to an SMS notification:
  1. Open the SMS message on your phone.
  2. Reply with the number of your response.

Result
After you reply to the notification, your response is sent to you and your employer. A record for your response is also updated. Your personal information is secure. Only the staff managing the health situation have access to your response.

Response scripts

Use response scripts to automatically take actions based on user responses to survey questions. Response scripts can be used to create or update records across any of the Emergency Response Management and Safe Workplace suite apps.

Each response script is associated with a survey. The response script runs if a user completes the associated survey and their answers match the response criteria.

Note: The Employee Readiness Surveys app must be installed to use response scripts.

Included response scripts

Emergency Outreach provides the pre-built Request PPE response script.

The Request PPE response script requires the Workplace PPE Inventory Management app. This response script creates a PPE request for employees who complete the Employee workplace readiness survey and meet the response criteria for the health status, travel, and ready to return to the workplace questions.

The Request PPE response script is not active by default and must be manually activated. It is ready to activate without any modifications, but you can choose to edit the script to meet your company's needs. To activate the Request PPE response script, navigate to **Emergency Outreach** > **Response Scripts** and click the Request PPE record. Select the **Active** check box, then click **Update**.

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If you need to perform additional actions based on survey responses, you can create additional response scripts. Use the included Request PPE response script as an example to help create your own response scripts.

Create a response script

Create a response script to automatically create or update records based on user responses to survey questions.

Before you begin

Role required: sn_imt_checkin.checkin_admin

About this task

Response scripts can be used to create or update records across any of the Emergency Response Management and Safe Workplace suite apps. For example, you could create a response script to reserve a workspace for a user who is ready to return to the workplace.

Procedure

1. Navigate to **All** > **Emergency Outreach** > **Response Scripts** and click **New**.
2. On the form, fill in the fields.

Response script form

Field	Description
Active	Selected.
Name	Name of the script.
Survey	Survey that causes the script to run. When a survey instance is completed by a user, the script runs if the user's responses to the survey questions match the response criteria.

Script	Script to insert or update a record.
	
	The script should perform the following steps.
	○ Get the sys_id for the user who submitted the survey.
	`var userSysId = userGr.getUniqueValue();`
	Note: The `userGr` variable is defined in the Run Response Scripts action. This action is used by the Response Script Actions flow, which runs the response scripts when a user completes a survey and fulfills the response criteria. The `userGr` variable is a user GlideRecord, so you can use it to get additional fields from the user as needed. For example, `userGr.getValue('location')` gets the user's location.
	○ If the plugin that installs the table you want to write to is active, insert or update a record for the user.
	Note: The following code is provided as an example only. You must provide the correct plugin, table, and field names in your script, and make any additional modifications that you require.
	`//example code to insert a record`
	`if (GlidePluginManager.isActive('plugin_name')) {`
	`var now_GR = new GlideRecord('table_name');`

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Field	Description

	``
	    now_GR.initialize();
	    now_GR.user_field = userSysId;
	    now_GR.field = 'value';
	    //update additional fields here as needed
	    now_GR.insert();
	}
	``
	``
	//example code to update an existing record associated
	 with the user
	if (GlidePluginManager.isActive('plugin_name')) {
	    var now_GR = new GlideRecord('table_name');
	    now_GR.get('user_field', userSysId);
	    now_GR.field_to_update = 'value';
	    //update additional fields here as needed
	    now_GR.update();
	}
	``
	``
	//example code to update multiple existing records
	 associated with the user
	if (GlidePluginManager.isActive('plugin_name')) {
	    var now_GR = new GlideRecord('table_name');
	    now_GR.addQuery('user_field', userSysId);
	    now_GR.setValue('field_to_update', 'value');
	    //update additional fields here as needed
	    now_GR.updateMultiple();
	}
	``

3. Save the response script record using the form context menu.
   The Response Criteria related list is automatically populated with all questions from the associated survey.
4. Edit the response criteria to define the answers a user must provide for the response script to run.
   a. Define the required answer in the response criteria for relevant questions.
   b. Delete the response criteria for any questions that don't require a specific answer.
5. Click **Update**.

Domain separation for Emergency Outreach

This application fully supports domain separation service provider (SP) use cases. The following table lists the domain separation use cases for service providers (SPs) using this application.

Domain separation use cases

Use case	Functions	Limitations
SP Internal - SP check-in admin uses the application to contact internal employees by email or through Now Mobile App.	Yes	None
SP External - SP check-in admin uses the application to contact tenant employees by email or through Now Mobile App.	Yes	None

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Domain separation use cases (continued)

Use case	Functions	Limitations
Tenant - Tenant check-in admin uses the application to contact their employees (in their domain only) by email or through Now Mobile app.	Yes	None

Some modules in the Emergency Outreach application are affected by domain separation.

SEND OUTREACH module (Create New for employee check-in table)

- Notification can be configured to target users, groups, departments, locations or customized for conditional criteria
- Email is standard HTML
- Domain column exists

RESPONSE OPTIONS module (Notification responses table)

- Domain column exists
- Shows response links that appear in notifications

VIEW OUTREACHES module (Employee check-in table)

- Domain column exists
- Shows notification structure and a related list that contains all responses (Table: Check-In Acknowledgement); the response table has domain column row and business logic protections
- Can output an Excel spreadsheet that displays current responses and status

DASHBOARD module

Reporting dashboard, shows aggregate of all notifications and their acknowledgment status.

Emergency Self Report

During a crisis, the ServiceNow® Emergency Self Report application gives users a way to notify their organization of their health status. It also provides a workflow for qualified users to safely return to work. Managers and response teams can track user reporting.

In contrast to email or phone reporting and manual data consolidation, Emergency Self Report provides a digital workflow that captures and automatically rolls up user reporting data for analysis and action. The application offers benefits for various people within the organization, with different views displayed for various roles.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

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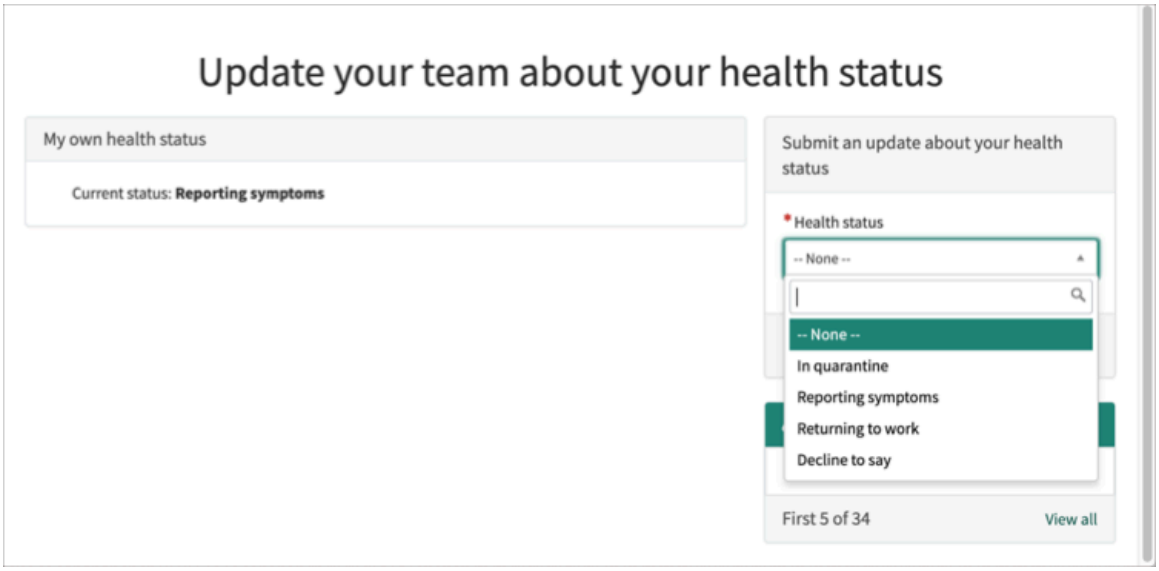
Users can report their status

A menu-driven interface enables users to report their status to their managers. Users can use the same interface to update their manager and global response team when they are ready to return to work. Managers can notify users when they may return.

User view



If ServiceNow® Contact Tracing is installed, a case is created automatically for a user who self-reports as being in quarantine. If an active case exists for the user at the time of reporting, a note is added to the case for the self-reporting.

Managers can monitor the status of their teams

Managers can view a summary of their team's reported status and the details of an individual person. They can reassign an affected user's work to others on the team if the work is tracked in the ServiceNow instance. If users don't have access to the application, the manager can submit a report on their behalf.

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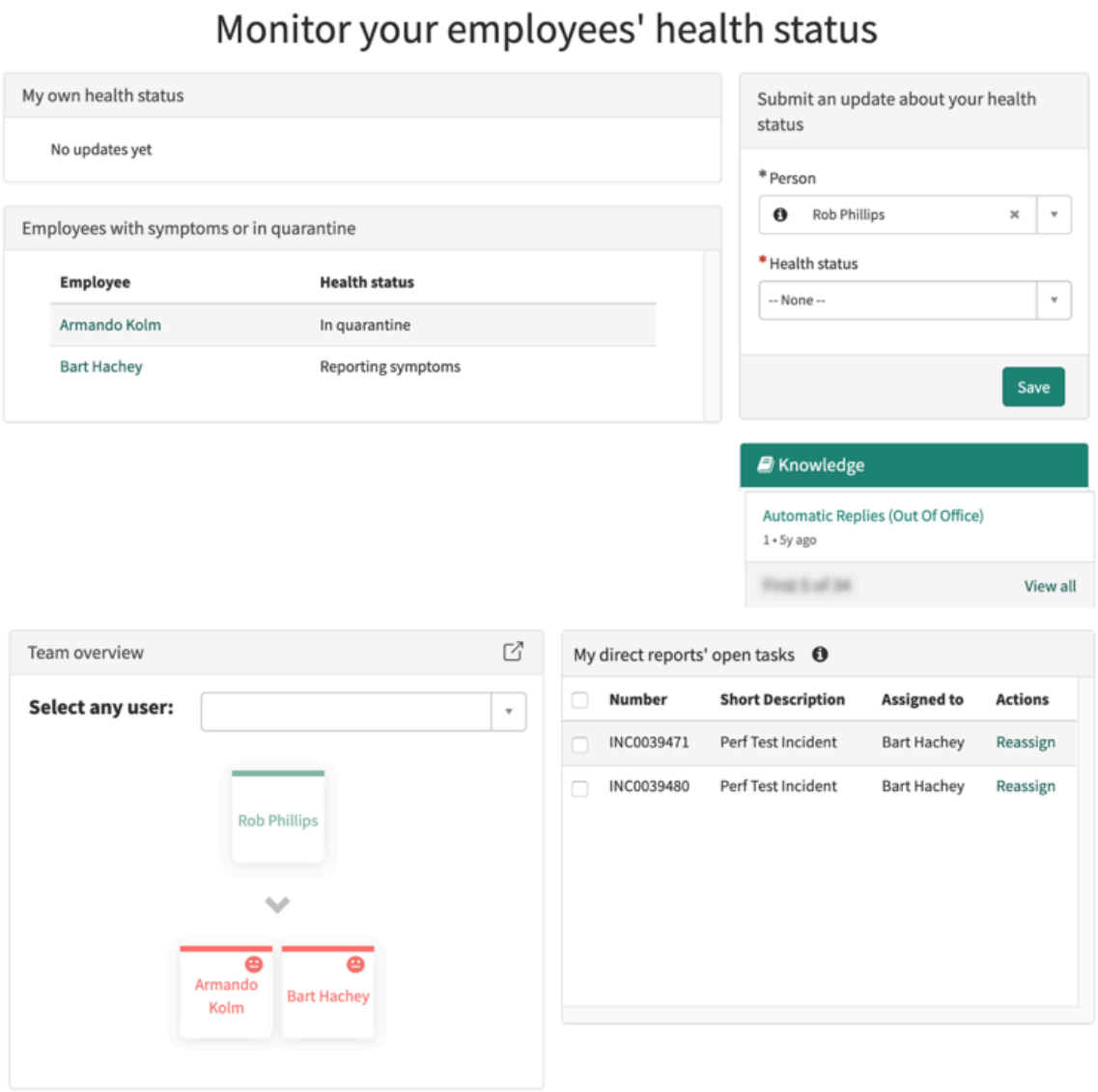
Manager view



Response teams can view the status of all teams

Response teams can view an overview dashboard that summarizes the status for all self-reported users. Data can be viewed and sorted in multiple ways for analysis and action.

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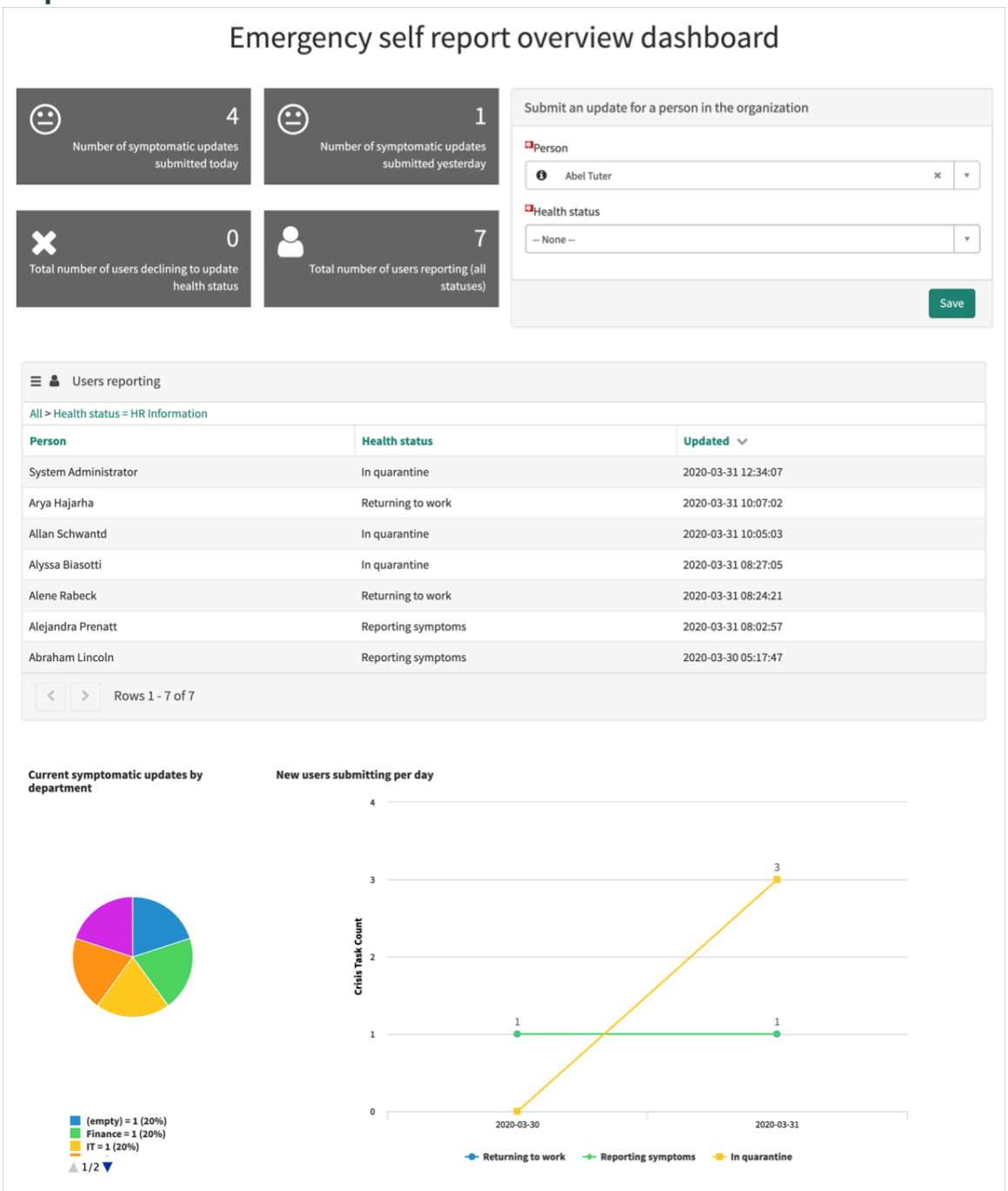
Response team view



Response team can work with HR tasks

HR tasks are created when a user self-reports. Each HR task is associated with a self-reported crisis task. The response team member can navigate to **Emergency Self Response** > **HR tasks** to view the list.

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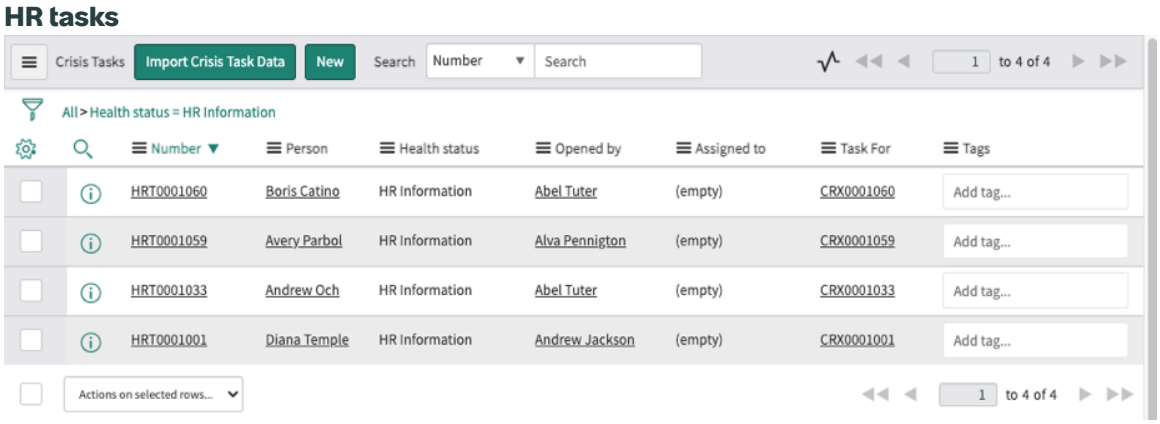

HR tasks do not have a specific workflow associated with them. They are created in the Open state, and closing the associated crisis task does not affect the HR task. Your organization can determine how to use or manage HR tasks, if at all. Review the HR task form to determine whether it can be of use within your response strategy.

Use with other Emergency Response Management applications

Emergency Self Report was originally developed to monitor and aid in stopping the community spread of COVID-19 among users. It is part of the suite of ServiceNow® Emergency Response Management applications built on the ServiceNow AI Platform® to assist companies in their emergency response efforts. With the Emergency Exposure Management application, you can identify users who might have been exposed. You can then contact affected users through the Emergency Outreach application. Both applications are available in the ServiceNow Store.

Emergency Response Management for federal customers

Federal customers using IL4 or FedRAMP environments will see the Emergency Response Management applications ready and available to install on their instances without having to make any special requests. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

ServiceNow is offering this application to government agencies and their authorized users, not to employees of government agencies in their individual capacities. Use of this application is being offered free of charge for a limited or extended time period and with no expectation of payment from the government agency to ServiceNow for use during that time period, nor does usage create an actual or implied future obligation on behalf of the government. ServiceNow hereby expressly waives any future claims for payment from the agency in connection with usage of the application. Government customers are solely responsible to confirm with the agency's Ethics Office or its authorized representative that acceptance and usage of the application is permissible.

All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Set up Emergency Self Report

To set up Emergency Self Report, install the application. Then configure user access, a dedicated knowledge base, and system properties.

Install Emergency Self Report

You can install Emergency Self Report if you have the admin role.

Before you begin
Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Emergency Self Report`.
3. Click **Install**.

   The Application installation dialog box opens.
4. **Optional:** Load the demo data by selecting the **Load demo data** check box.

   (Optional) For information about how to install or reinstall demo data after the initial installation, see the Work around to install demo data if application is already installed [KB0722909] article in the Now Support Knowledge Base.
5. Click **Install**.
6. When the installation is complete, click **Close**.

Result

The Emergency Self Report application is installed on your instance.

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Components installed with Emergency Self Report

Several types of components are installed with Emergency Self Report, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Roles in Emergency Self Report

Role title [name]	Description	Contains roles
Self report user [sn_imt_quarantine.crisis_task_user]	Access the Emergency Self Report Dashboard to report health status.	notify_view
Crisis task users [sn_imt_quarantine.humanResourceTeam]	View and manage HR tasks, submit updates for other users, and import crisis tasks. Also grant the self report user role.	notify_view

Tables installed

Tables installed with Emergency Self Report

Table	Description
Crisis Task [sn_imt_quarantine_crisis_task]	Contains all self report crisis tasks, including HR crisis tasks.
Crisis Task Status Log [sn_imt_quarantine_crisis_task_status_log]	Contains a history of all reported health statuses for each user. This table is only populated when the *sn_imt_quarantine.enable.health.status.log* property is set to `true`.
Bulk Import Crisis Tasks [sn_imt_quarantine_bulk_load_crisis_task]	The Import Set table for importing reported health statuses from an Excel spreadsheet to create crisis tasks in bulk. When you load data from the Excel file into the application, the imported records are first saved in this import set table. After you run the transform or execute the scheduled import script, the records are copied to the Crisis Task table.

Configure Emergency Self Report

Configure Emergency Self Report to align with your business needs.

Before you begin
Role required: admin

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About this task

Complete the following configurations as needed.

- Grant app access to the appropriate response team members.
- Specify custom system messages to help your users and response team members.
- Set system properties to control how you use Emergency Self Report.
- Configure user health status choices.
- Create a dedicated knowledge base and add it to your Service Portal.

Procedure

1. Add the default application user roles to appropriate groups.

   The application provides the following default roles in the sys_user_role table:

   sn_imt_quarantine.crisis_task_user

   Enables group members or individuals to submit a health alert for themselves. Managers can also submit and monitor alerts for their direct reports.

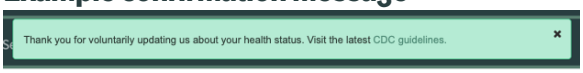
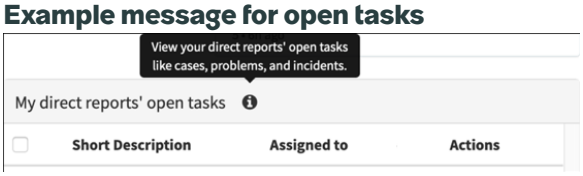
   sn_imt_quarantine.humanResourceTeam

   Enables group members, such as HR or Global Security team members, to manage the reported health alerts.

   For information about how to assign roles to groups, see Roles.

2. Navigate to **Emergency Self Report** > **UI Configuration**, set the desired message values, and then click **Update**.

Emergency Self Report UI properties

Property name	Description
sn_imt_quarantine.crisisSubmitMessage	Configure the message that is displayed to users after they submit a health status. **Example confirmation message**  Update your team about your health status
sn_imt_quarantine.openTasksInfoMessage	Configure a tooltip for managers who are viewing open tasks for their direct reports. **Example message for open tasks** 

3. Navigate to **Emergency Self Report** > **Emergency Self Report Properties**, set the desired property values, and then click **Update**.

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Emergency Self Report properties

Property name	Description
sn_imt_quarantine.enable.health.status.log	When this property is set to `true`, a new record is created in the Crisis Task Status Log table [sn_imt_quarantine_crisis_task_status_log] every time that a user health status update is submitted. Crisis task records have a Crisis Task Status Logs related list that shows all health status updates for that crisis task. When this property is set to `false`, the Crisis Task Status Log table is not populated. The default value is `false`.
sn_imt_quarantine.data.retention.period	Sets the number of days that records are stored in the Crisis Task Status Log table [sn_imt_quarantine_crisis_task_status_log] before they are deleted. The default value is 30 days.
sn_imt_quarantine.fetchTaskQuery	Determines the data that is visible in the Emergency Self Report dashboard in the My direct reports' open tasks section. The default value is to show only P1 and P2 requests, incidents for the last month, and those assigned to the manager's direct reports: `sys_created_on>=javascript:gs.beginningOfLastMonth()^active=true^assigned_to.managerDYNAMIC90d1921e5f510100a9ad2572f2b477fe^sys_class_name=incident^ORsys_class_name=sc_task^ORsys_class_name=sc_request^priorityIN1,2`
sn_imt_quarantine.healthStatusChangeTaskBehavior	Sets the behavior of crisis tasks for users who update their health status after their most recent crisis task is closed. When the value is `update`, the user's most recent HR crisis task is reopened and their health status is updated with their new reported status. When the value is `create`, a new HR crisis task is created if an open one doesn't already exist for the user's newly reported status.

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Property name	Description
	The default value is `update`.
sn_imt_quarantine.healthStatusesToTriggerTaskReopen	Sets the health statuses that reopen tasks or create new tasks if reported by a user after their most recent crisis task is closed. By default, the statuses that reopen or create new tasks are **In quarantine** and **Reporting symptoms**.
sn_imt_quarantine.hrGroup	Members of the global response team, who will have access to your team's user records. You can add a role to a group to act as a global response team or you can add the role directly to the users.
sn_imt_quarantine.MaxOrgLevelLimit	Number of levels in your organization structure. For example, If you have CEO, VP, Director, Manager, and Individual Contributors, you have five levels in your organization structure.
sn_imt_quarantine.outSickDuration	The time frame (in days) after which users are safe to return to work if sick. The default value is 20 days.
sn_imt_quarantine.quarantineDuration	The time frame (in days) after which users are safe to return to work if self-quarantined. The default value is 14 days.

4. Configure the check-in choices that the user can select.

   a. Navigate to **System Definition** > **Choice Lists**.

   b. Set a search filter with the following conditions:
      - **[Table] [is] [sn_imt_quarantine_crisis_task]**
      - **[Element] [is] [request_type]**

   c. Change the label or value for choices in the list, or add new values.

   d. Click **Update**.

5. Configure knowledge articles about the emergency event.

   For example, provide local regulations, organization policies, and how-to information.

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a. Create a knowledge base to contain the application's articles.

b. Navigate to **Service Portal** > **Pages**.

c. Search for ID `self_report_dashboard` and click the record.

d. Click the **Emergency Self Report - Container 2** link.

e. Under Column 2, click **Instance of Simple List**.

f. On the Table & Filter tab, name the knowledge base by setting the following filter condition: **[Knowledge Base] [is] [<name>]**.

g. Associate application articles with the application knowledge base.

Report and track health statuses during an emergency

Emergency Self Report is used by users to self-report their health status, by managers to track the health status of their users, and by response teams to view the status for all users and sort the data for analysis and action.

Before you begin

Role required: sn_imt_quarantine.crisis_task_user or sn_imt_quarantine.humanResourceTeam

About this task

The workflow for Emergency Self Report begins with users self-reporting their health status, managers determining the actions that must be taken related to the user's status, and a response team evaluating a unified view of the status of all reporting users.

Procedure

- To report your health status:

1. Navigate to **Emergency Self Report** > **Emergency Self Report Dashboard**.

   Note: To report your health status in the Now Mobile app, navigate to the **Health** tab and tap the quick action icon ( ) in the top-right corner.

   If you're a manager, your name is automatically selected in the **Person** field so that you can report your own health status. If you're reporting the status for a direct report, select the user's name from the **Person** field.

   If you're not a manager, you can report only your own status and the **Person** field doesn't appear.

2. Choose an option from the **Health status** list.

   System administrators can configure these options.

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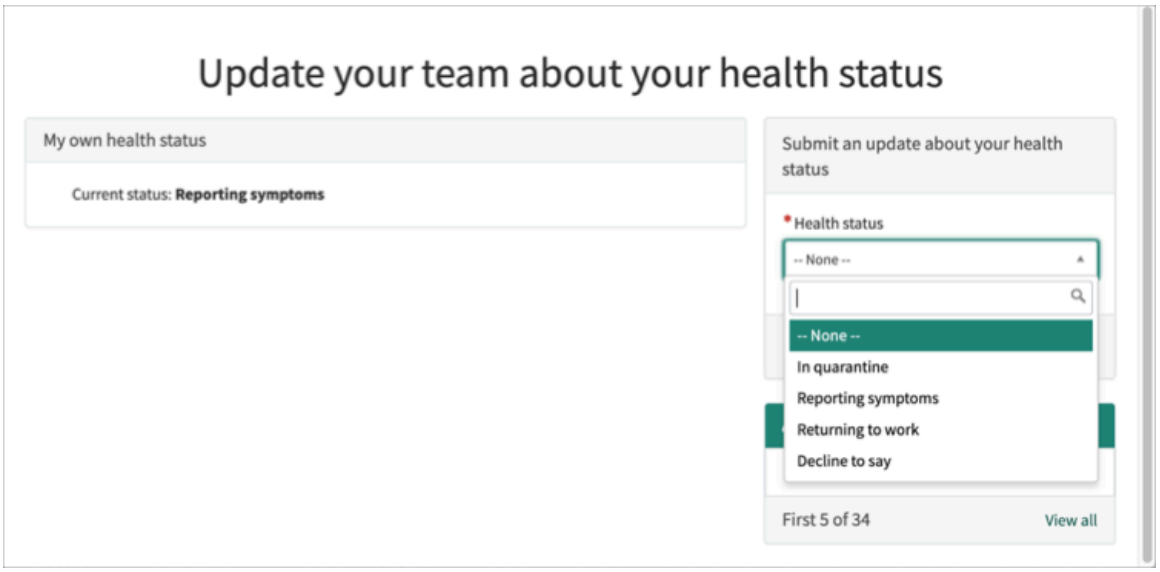
Example



3. Click **Save**.
   The health status is updated on the left side of the screen. A message is sent to your manager, and a crisis task is generated for the response team. The crisis task can be assigned an approver, and the reporting user's assigned tasks can be reviewed.

   If Contact Tracing is installed and you selected the **In quarantine** option, a case is created automatically for the user. If an active case exists for the user at the time of reporting, a note is added to the case about the self-reporting. For more information, see ServiceNow® Contact Tracing.

4. **Optional:** When you're ready to return to work, update your health status to **Return to Work**. A Human Resources task is created so that HR can coordinate with you. The HR task is for information, and is not updated automatically when other tasks are updated. In the manager's view, your status changes to green.

- To evaluate the health status of your direct reports if you're a manager:

1. Navigate to **Emergency Self Report** > **Emergency Self Report Dashboard**.

   You see a single screen view of your direct team's status and tasks, and can select individual user records. Green tiles indicate that the user has provided no information. The tiles of affected team members are red and display an icon.

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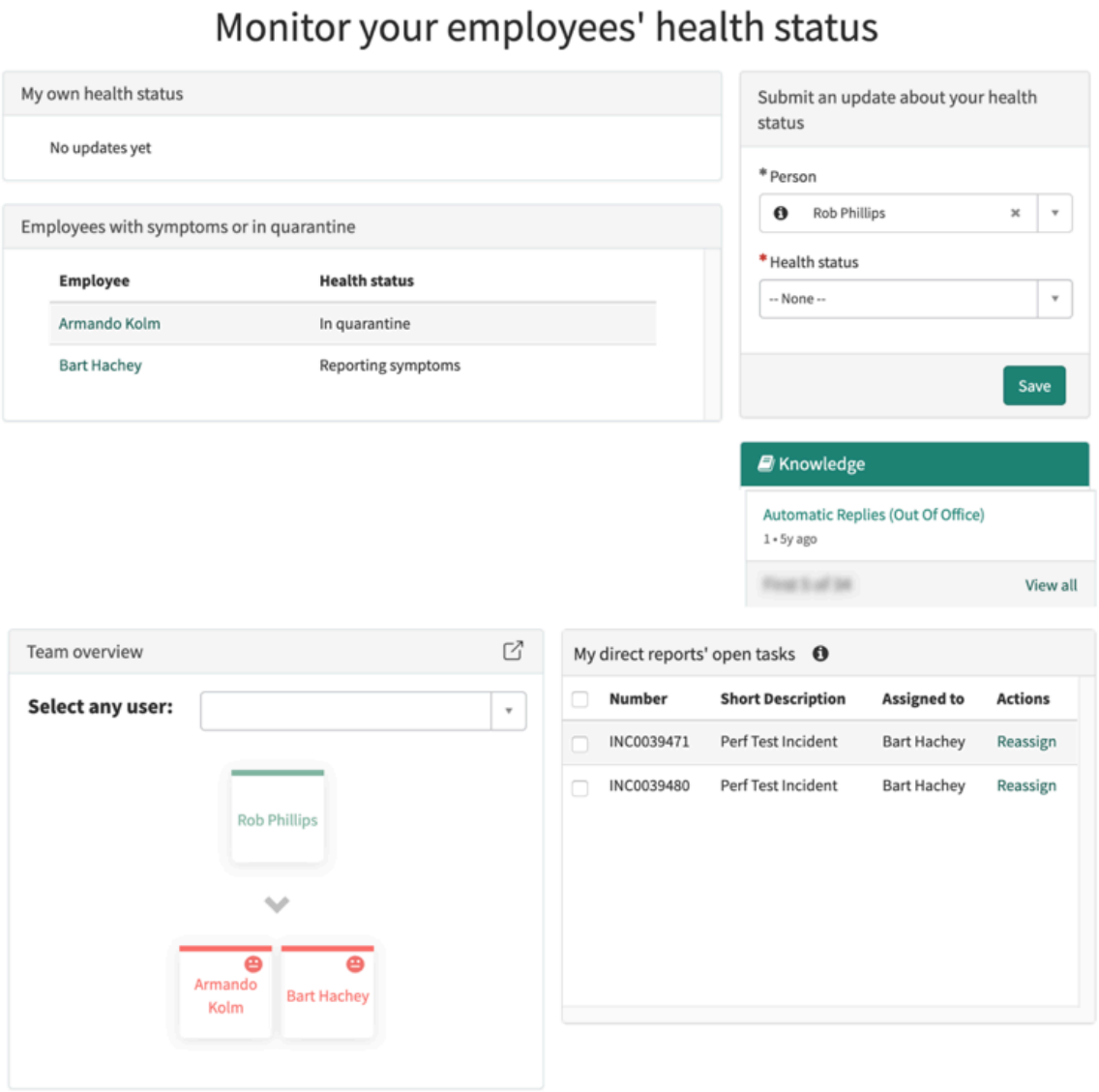

2. To display a user's assigned tasks, click a tile.

3. To reassign tasks for the user, click the **Reassign** link in the task row, assign the task to another user, and click **Submit**.

Related topics

View a dashboard of all user reports if you are a response team member

View self-reported user HR tasks

Members of the emergency response team can view all user reports and associated HR tasks on the Emergency Self Report overview dashboard.

Before you begin

Role required: sn_imt_quarantine.humanResourceTeam

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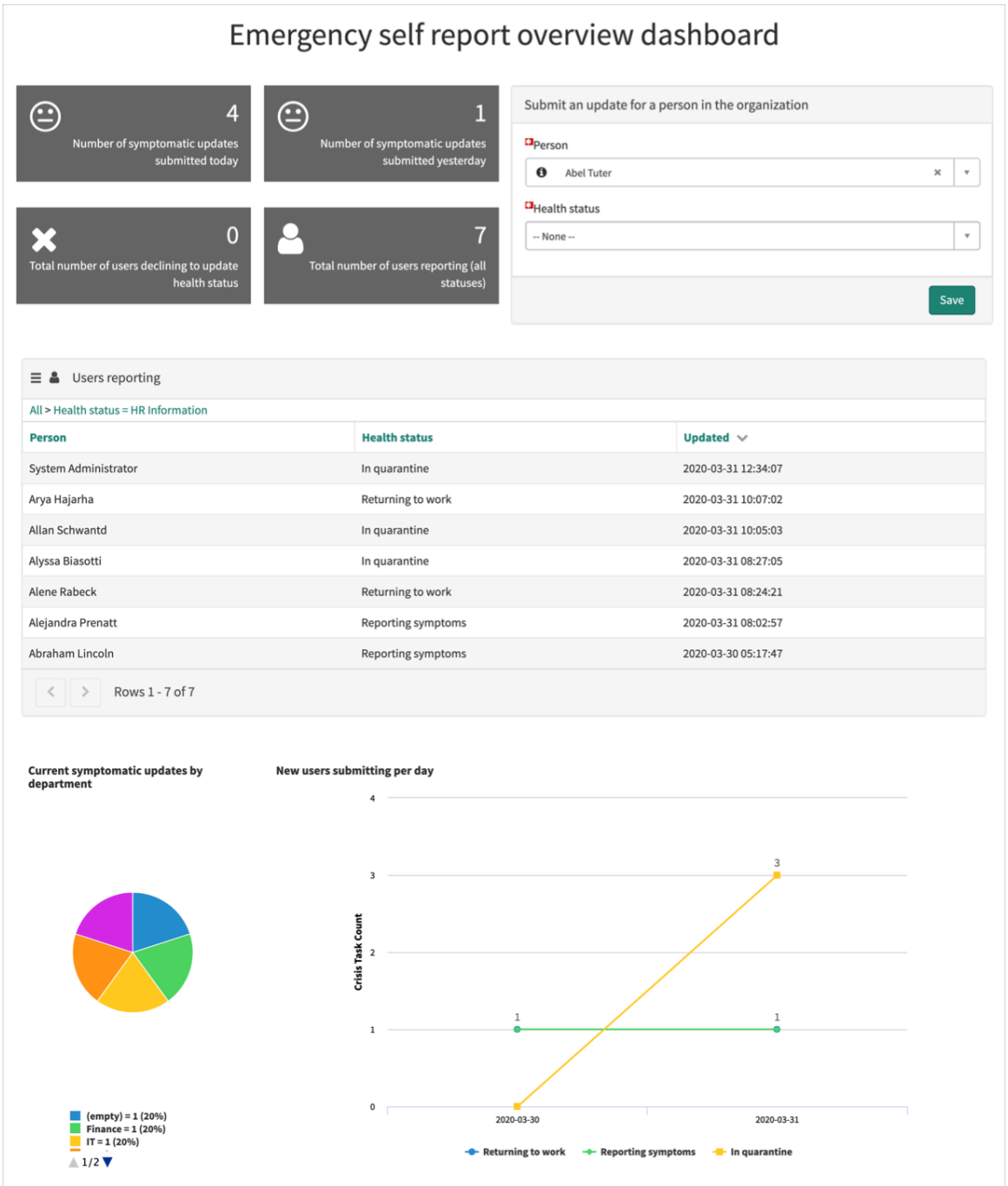
About this task

The Emergency Self Report dashboard enables monitoring by and tasks of the emergency response team. Users with the HR emergency response role can also report on behalf of anyone in their organization, and they can easily update records as needed.

Procedure

1. Navigate to **All** > **Emergency Self Report** > **Overview Dashboard**.
   You can also access the dashboard as a service portal page.
2. Review the numbers of reports and updates occurring today, and click any card to see the data.



3. **Optional:** To add someone who does not have self-reporting access, select the user's name in the **Person** field and select a status from the **Health status** list.

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4. **Optional:** To view an HR task for a reporting user, click the user's name in the **Users reporting** list.
5. **Optional:** Export the list of reporting users in PDF, Excel, or CSV format by clicking the icon in the list banner.
6. Review the charts to see at a glance how the organization is affected.
   Click any element in a chart, such as a pie wedge or marker, to see the corresponding data.

Import Crisis Task data

As a crisis task administrator, upload a spreadsheet of self-reported health statuses to create crisis tasks in bulk.

Before you begin

You need a spreadsheet (.csv or .xlsx file) with data in the following columns: Person, User name, and Health Status. You can download a template from the Import Crisis Task Data data source record.

Role required: sn_imt_quarantine.humanResourceTeam

About this task

The Bulk Import Crisis Task Data scheduled job is installed with the Emergency Self Report application. When you upload the spreadsheet, you can manually execute the job to import data into the Crisis Task table. HR tasks and their associated crisis tasks are created for each user based on their reported health status.

Procedure

1. Navigate to **All** > **Emergency Self Report** > **HR Tasks**.
2. Click the **Import Crisis Task Data** button.
3. In the Scheduled Data Imports list, open the **Bulk Import Crisis Task Data** scheduled data import job.
4. In the **Data Source** field, open the **Import Crisis Task Data** record.
   a. Click the attachments icon ( ).
   b. Click **Choose file** and select the source Excel file.
   c. Close the Attachments window.
5. Click **Update**.
   The Scheduled Data Import record appears with the attachment.
6. Click **Execute Now**.
   The process runs in the background to copy data from the Bulk Import Crisis Tasks table to the Crisis Task table.

   Note: The number of records in the source Excel file affect the time needed before the imported data is available in the Crisis Task table.

Result

Records are imported to the Bulk Import Crisis Tasks table and copied to the Crisis Task table. New HR tasks are created with their associated crisis tasks. Records are not copied to the Crisis Task table in the following situations:

- The user name is invalid or blank.
- The health status is invalid or blank.

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- The user has an active case.
- The user is a duplicate.

Domain separation for Emergency Self Report

The following table lists the domain separation use cases for service providers (SPs) using this application.

Domain separation use cases

Use case	Functions	Limitations
SP Internal - SP uses the application for internal employees to self-report their status via a dedicated service portal or web page.	Yes	None
SP External - SP uses the application for tenant employees to self-report their status via a dedicated service portal or web page.	Yes	None
Tenant - Tenant uses the application for their sub-domain for their employees to self-report their status via a dedicated service portal or web page.	Yes	None

Some modules in the Emergency Self Report application are affected by domain separation. These modules can be used by SPs and tenants.

EMERGENCY SELF REPORT DASHBOARD module

- A web page where users can self-report their current status. When they submit their status, a health record is created. (Table: Crisis Task)
- A knowledge base list of articles.

ALL HEALTH RECORDS & HR TASKS module (Crisis Tasks)

- Domain column row protections exist.
- Extended from the Task table and therefore contains the necessary domain-separated business logic.
- Related list, Approvers (Table: Approval) is an established domain-separated table.
- Related list, Tasks (Table: Task) is an established domain-separated table.

Emergency Exposure Management

The ServiceNow® Emergency Exposure Management application helps identify users who might have been exposed to infectious diseases by analyzing multiple data sources such as meetings, location, shifts, Wi-Fi access logs, and badge scans of affected users.

Emergency Exposure Management provides tracing systems to use the following data sources to generate a list of potentially exposed users:

- Microsoft Office 365 meeting invite
- Location of the ServiceNow user profile
- Workspace reservation
- Badge scan log

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- Wi-Fi access log
- Employee daily log
- Field service task
- Visitors log
- Handheld or wearable device proximity sensing data

Note: Some of the tracing systems require you to install other Safe Workplace suite and Emergency Response Management applications. For more information, see Tracing systems in Emergency Exposure Management.

You can also manually add users whom you know might have been potentially exposed to an affected user.

In addition to using the base system tracing systems, you can set up a tracing system that uses your own data source to identify potentially exposed users. For more information, see Set up a tracing system for an exposure data source.

Use guided setup to implement Safe Workplace suite apps

The Safe Workplace guided setup provides a sequence of tasks that help you configure the Safe Workplace and Emergency Response Management applications on your ServiceNow instance. To open the Safe Workplace guided setup, navigate to **Guided Setup** > **Safe Workplace Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Use with other Emergency Response Management applications

Emergency Exposure Management was originally developed to monitor and aid in stopping the community spread of infectious diseases, such as COVID-19 among users. It is part of a suite of ServiceNow® Emergency Response Management applications built on the ServiceNow AI Platform® to assist companies in their emergency response efforts. You can also enable users to self-report their health status through the Emergency Outreach and Emergency Self Report applications, which are both available in the ServiceNow Store.

Emergency Response Management for federal customers

Federal customers using IL4 or FedRAMP environments will see the Emergency Response Management applications ready and available to install on their instances without having to make any special requests. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Install Emergency Exposure Management

You can install Emergency Exposure Management if you have the admin role.

Before you begin

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

Procedure

1. Navigate to **System Applications** > **All Available Applications** > **All**.
2. Search for `Emergency Exposure Management`.
3. Click **Install**.
4. In the Application installation dialog box, click **Install**.
5. When the installation is complete, click **Close**.

   The Emergency Exposure Management application is installed on your instance.

6. **Optional:** Control access to the application by creating a group and assigning roles to the group or individual users.

   (Optional) For more information, see Roles.

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Components installed with Emergency Exposure Management

Several types of components are installed with Emergency Exposure Management, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles installed

Roles installed with Emergency Exposure Management

Role title [name]	Description	Contains roles
Emergency Exposure Admin [sn_imt_diagnosis.diagnostics_admin]	Can create a new diagnostic request and view or download the list of impacted users.	• sn_imt_diagnosis.workplace_exposure_analys • sn_imt_monitoring.monitoring_user
Workplace exposure analyst [sn_imt_diagnosis.workplace_exposure_analyst]	Identifies potentially exposed employees using workplace reservations from the ServiceNow® Workplace Core application.	None

Scheduled jobs installed

Scheduled jobs installed with Emergency Exposure Management

Scheduled job	Description
Execute employee diagnostic events	Looks up pending events from the Diagnostic Events [sn_imt_diagnosis_diagnostics_event] table and processes them to populate the Impacted Users [sn_imt_diagnosis_impacted_users] table.

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Tables installed

Tables installed with Emergency Exposure Management

Table	Description
Diagnostic Request [sn_imt_diagnosis_diagnostic_request]	Allows a user to create a diagnostic request for the affected user.
Diagnostic Events [sn_imt_diagnosis_diagnostics_event]	Subtasks generated for diagnostic requests. A scheduled job processes the tasks to identify the list of potentially impacted employees.
Diagnostic Request Task [sn_imt_diagnosis_diagnostic_request_task]	Diagnostic request tasks created automatically for diagnostic requests to identify the list of potentially impacted employees. The task is created based on the selected data source in a diagnostic request.
Diagnostic Request Task Config [sn_imt_diagnosis_diagnostic_request_task_config]	Configuration for a diagnostic request task. For a data source selected in a diagnostic request, the corresponding diagnostic request task when created matches the type of task configuration.
Impacted Users [sn_imt_diagnosis_impacted_users]	Employees who may have been exposed to infectious diseases through an affected employee. Populated by analyzing multiple data sources for the affected employees.
Impacted Visitors [sn_imt_diagnosis_impacted_visitor]	Visitors who might have been exposed to infection. Populated by analyzing the visitors request entry records invited by the affected employees. The table is available for use only if you also subscribe to ServiceNow® Contact Tracing and ServiceNow® Employee Health Screening. The data of this table is displayed in the Impacted visitors related list on the Diagnostic Report form.
Potential Workplace Exposure [sn_imt_diagnosis_potential_workplace_exposure]	Potentially exposed employees who had reservations for the same shifts as the affected employee during the specified time period. The table is available for use only if you also subscribe to Workplace Core.
Tracing system [sn_imt_diagnosis_tracing_system]	Data source configuration to identify potentially exposed employees by using diagnostic requests.
Tracing system properties [sn_imt_diagnosis_m2m_tracing_system_properties]	System properties for additional configuration of tracing systems.

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Set up Emergency Exposure Management

After installing the Emergency Exposure Management application, set up tracing system for your data sources, diagnostic request task configuration, and register Microsoft applications.

Before you begin

Role required: sn_imt_diagnosis.diagnostics_admin or admin

Procedure

1. Configure Microsoft Office 365 for Emergency Exposure Management.
   Emergency Exposure Management uses Microsoft Office 365 data to analyze the meetings of affected employees to identify other potentially exposed employees.
2. Set up a tracing system for an exposure data source.
   A tracing system corresponds to a contact tracing data source that you can select in a diagnostic request to identify potential exposure from an affected employee.
3. Create or modify a diagnostic request task configuration.
   A diagnostic request task enables you to perform some manual tasks to fetch potentially exposed employees in a diagnostic request report for an affected employee.

Configure Microsoft Office 365 for Emergency Exposure Management

Configure Emergency Exposure Management by setting the application system properties. If you want to search by Microsoft Office 365 meeting information, you also must register the Microsoft application and configure it.

Before you begin

Important:

If you are an on-premise customer with Microsoft Office 365 and you need assistance in configuring Emergency Exposure Management, contact your sales representative or contact Customer Service and Support at *https://support.servicenow.com/now?draw=case*.

Role required: admin

Procedure

1. Register the Microsoft application.
   a. Sign in to your Azure portal.
   b. In the left navigation pane, select **Azure Active Directory**.
   c. Under **Create**, select **App registration**.
   d. On the form, fill in these fields.

Form fields

Field	Value
Name	The name for the application.

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Field	Value
Supported account types	Select the first option: Accounts in this organizational directory only

The app is created with unique credentials to use.

2. Add permissions to the Microsoft application to read employee calendars.
   a. In the left navigation pane, select **API permissions**.
   b. Click **Add a Permission**.
   c. In the Request API permissions pane, under **Commonly used Microsoft APIs**, select **Microsoft Graph**.
   d. Click **Application Permissions**.
   e. Under **Calendars**, select **Calendars.Calendars read**.
   f. Click **Add permissions**.
   g. Click **Delegated Permissions**.
   h. Under **Calendars**, select **Calendars.Calendars read**.
   i. Click **Add permissions**.
   j. On the Configured permissions screen, click **Grant admin consent**.
3. Obtain a trusted SSL certificate following your company's procedure.
   For information about adding a TLS/SSL certificate in Microsoft Azure App Service, refer to Add SSL Cert in the Microsoft Azure App Service Documentation guide.
4. In the Azure portal, upload the certificate.
   a. Access your Azure portal.
   b. In the left navigation pane, select **Certificates and Secrets**.
   c. Select **Upload certificate** and upload the certificate created in step 3.
5. Create a Java Key Store certificate in your ServiceNow instance.
   a. Navigate to **System Definition** > **Certificates**.
   b. Click **New** and create a new certificate with a **Type** value of *`Java Key Store`*.
   c. Set the **Short Description** text to the alias used in 3.
   d. Set the **Keystore Password** to the password used in step 3.
   e. Attach the `keystore.jks` certificate exported in step 3.
6. In your ServiceNow instance, set system properties for Emergency Exposure Management.
   a. Navigate to **Emergency Exposure Management** > **Properties**.
   b. Verify the values or modify them for your environment.
   c. Add these required properties.
      - Client ID
      - Tenant ID
      - Certificate – The sys_id of the certificate created in Step 5.

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- Private key – Use the password used to generate the keystore in Step 3.
- (Optional) Location – Location accessible from tables, such as a floor or building.

d. Verify that the Microsoft URL for token generation is correct for your organization.

e. Click **Save**.

Tracing systems in Emergency Exposure Management

A tracing system configured for a contact tracing data source enables you to identify potentially exposed employees by running a diagnostic request.

The diagnostic request for an affected employee queries the contact tracing data to identify people who might have interacted with the affected employee. You can select multiple tracing systems in a diagnostic request to use multiple data sources to broaden the coverage used to find potential exposure.

A tracing system can be a group of other tracing systems with a similar type of input data source. For example, say you have Wi-Fi access data integration with multiple systems such as Cisco DNA Spaces and Mist Systems. You could have a tracing system called Wi-Fi access log and make it the parent tracing system of other tracing systems using the Wi-Fi input data sources.

You can customize the tracing systems for data sources available in Emergency Exposure Management or set up a new tracing system. For more information, see Set up a tracing system for an exposure data source.

For some tracing systems to be available in Emergency Exposure Management, you must install other Safe Workplace suite and Emergency Response Operations applications.

Tracing systems installed with Emergency Exposure Management

These tracing systems are active by default.

Emergency Exposure Management tracing systems

Tracing system	Query
Location	Employees co-located with the affected employee, for example, on the same floor or building.
Outlook meetings Microsoft Office 365	Employees who accepted the same meetings as the affected employee during the specified time period.

Tracing system installed with Workplace Core

This tracing system is not active by default. To use this tracing system for identifying potentially exposed employees, activate it and also configure the corresponding data source in Workplace Core.

For more information, see Install Workplace Safety Management.

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Workplace Core tracing system

Tracing system	Query
Workplace reservations	Employees who had reservations for the same shifts as the affected employee during the specified time period.

Tracing systems installed with Contact Tracing

These tracing systems are not active by default. To use these tracing systems for identifying potentially exposed employees, activate them and also configure the corresponding data sources in Contact Tracing.

For more information, see Setting up Contact Tracing.

Contact Tracing tracing systems

Tracing system	Query
Badge reader	Queries the Badge Access Register [sn_imt_tracing_badge_access_register] table to fetch employees who swiped their badge on the same badge reader devices as the affected employee during the specified time period.
Employee daily log	Queries the Daily Contact Logs [sn_imt_tracing_daily_contact_log] table to fetch employees with whom the affected employee interacted during the specified time period.
Visitor log	Queries the Visitor Request For Entry [sn_imt_monitoring_visitor_request_for_entry] table to fetch visitors who interacted with the affected employee during the specified time period. Visitors who visited the workplace on invitation from the affected employee and have been screened through and let in are queried. Ensure that you have installed Employee Health Screening to use this tracing system.
Wi-Fi access log	Queries the Wi-Fi Access Register [sn_imt_tracing_wifi_access_register] table to fetch employees who used the same Wi-Fi access points as the affected employee during the specified dates. Wi-Fi access log data used to identify potentially impacted employees depends on Wi-Fi location preferences and available integrations. The tracing system has the following child tracing systems based on the data source: • Mist Systems • Cisco DNA Spaces For more information, see Retrieving Wi-Fi access log data. **Note:** The period for which you can get the data via a real-time API depends on the data retention policy of your Wi-Fi service provider.

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Contact Tracing tracing systems (continued)

Tracing system	Query
Handheld/Wearables	Queries the Wearable Access Register [sn_imt_tracing_wearable_access_register] table to fetch employees equipped with handheld or wearable devices who were in the close proximity with the affected employee during the specified time period. The Handheld/Wearables tracing system has the Zebra MotionWorks Proximity tracing system added as a child tracing system.
Kinexon SafeZone	Uses an integration with the KINEXON SafeZone API to identify potentially exposed users with KINEXON wearable devices who were in close proximity with the affected KINEXON user during the specified dates. For more information, see Configure KINEXON integration.

Tracing system installed with Field Service Management

This tracing system is not active by default. To use this tracing system for identifying potentially exposed employees, activate it and also configure the corresponding data source in Field Service Management.

For more information, see Emergency Exposure Management for field service agents.

Field Service Management tracing system

Tracing system	Query
Field service	Customers attended by an affected field agent during the specified time period. Also queries other field agents who interacted with the affected agent or visited the same customer as the affected agent during the specified time period.

Set up a tracing system for an exposure data source

Set up a tracing system for your exposure data source to identify potentially exposed employees by running the diagnostic requests for an affected employee.

Before you begin

Role required: admin

About this task

For more information about the available tracing systems, see Tracing systems in Emergency Exposure Management.

Procedure

1. Navigate to **All** > **Emergency Exposure Management** > **Administration** > **Tracing Systems**.
2. Click **New**.
3. On the form, fill in the fields.

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Tracing System form

Field	Description
Title	Title of the tracing system. The title is displayed as an option for selection in the **Tracing system** list on the Diagnostic Request form.
Name	Name of the tracing system.
Parent	Tracing system for a group of other tracing systems having the similar type of input data source. If the tracing systems are in a group, only the parent tracing system displays in the **Tracing system** list on the Diagnostic Request form.
Active	Option for making the tracing system active. Only active tracing systems are available for selection as a data source for the diagnostic requests.
Requires dates	Option for enabling the start and end dates to specify a period for querying the data source for the tracing system. If selected, the **Start date** and **End date** fields appear when you select this tracing system on the Diagnostic Request form.
Processing script tab	
Condition	Condition to determine the tracing system data for the diagnostic request on selecting a parent tracing system. For example, if two tracing systems A1 and A2 have the same parent tracing system called A. In a diagnostic request, if you select A as the tracing source, the condition determines whether to query data from A1 or A2. For reference, you can review the condition scripts of the base tracing systems Cisco DNA Spaces and Mist System having the parent tracing system as Wi-Fi access log. This field appears only when a tracing system is selected in **Parent**.
Use parent processing script	Option for executing the processing script of the parent tracing system. The parent tracing system's processing script populates the potentially exposed employees data in the corresponding related list on the Diagnostic Request form. If you select this option, the

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Field	Description
	current tracing system's processing script does not process. This field appears only when a tracing system is selected in **Parent**.
Processing script	Script to populate the potentially exposed employees data in the corresponding related list on the Diagnostic Request form.
Contact graph tab	
Legend icon	Icon representing the tracing system as data source for the potentially exposed contact's in the potentially exposed contacts visualization on the Case form. For more information, see Working on a case through contact tracing visualization.
Legend tooltip	Tooltip text that appears when you point to the legend icon.
Order	Order in which the icons appear in the Reason for exposure section.

4. Click **Submit**.

Result
The tracing system is created. The tracing system appears as one of the options in the **Tracing system** field on the Diagnostic Request form.

What to do next
- Associate a system property with a tracing system.
- Create or modify a diagnostic request task configuration.

Associate a system property with a tracing system

Associate a system property with a tracing system to enable additional control on the use of the tracing system's data source.

Before you begin
Role required: admin

About this task
For a list of system properties associated with various tracing systems, see System properties for tracing systems in Emergency Exposure Management.

Procedure
1. Navigate to **All** > **Emergency Exposure Management** > **Administration** > **Tracing Systems**.
2. Open a tracing system to associate a system property.
   To associate a new system property with the tracing system, create it by clicking **New** in the System Properties related list and filling in the System Property form.

   For more information about the System Property form fields, see Add a system property.

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3. Associate a system property with the tracing system.
   a. In the System Properties related list, click **Edit**.
   b. On the Edit Members form, move the required system properties from the **Collection** column to the**System Properties List** column.
   c. Click **Save**.

System properties for tracing systems in Emergency Exposure Management

System properties associated with tracing systems that are available in the Emergency Exposure Management application.

To configure the system properties available for a tracing system, navigate to **Emergency Exposure Management** > **Administration** > **Tracing Systems** and open the tracing system record.

For more information on setting up or modifying a tracing system, see Set up a tracing system for an exposure data source.

System properties for tracing systems installed with Contact Tracing

For more information, see Setting up Contact Tracing.

Properties for Contact Tracing

Property	Description
Tracing system: Badge reader	
sn_imt_tracing.badge_data_page_size	Number of records to proc data. The default value is 5
sn_imt_tracing.badge_reader_location	The field in the Badge Acc [sn_imt_tracing_badge_ac to the location of the badg **reader** option is selected form. You can also specify floor.floor_name. The defa the [sn_imt_tracing_badge
sn_imt_tracing.badge_owner_field	The field in the Badge Acc [sn_imt_tracing_badge_ac refers to the badge owner option is selected on the D You can also specify a dot- user.user_name. The defa [sn_imt_tracing_user_bad
Tracing system: Wi-Fi access log	
sn_imt_tracing.wifi_client_table	The CMDB Class table to l owner matching the Wi-Fi default value is cmdb_ci_c
sn_imt_tracing.wifi_client_mac_field	The field in the CMDB Clas stores the mac address of is mac_address.

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Properties for Contact Tracing (continued)

Property	Description
sn_imt_tracing.wifi_client_owner_field	The field in the CMDB Clas identifies the owner of the logs. The default value is a
sn_imt_tracing.wifi_client_identification_fields	The fields in the CMDB Cla identify the Wi-Fi client ma access log. The default val
sn_imt_tracing.wifi_ble_client_table	The CMDB Class table to l owner matching the Wi-Fi Fi access logs. The default **Note:** The Wearable [cmdb_ci_wearable] is Models application av Store. For more inform Models.
sn_imt_tracing.wifi_ble_client_mac_field	The field in the CMDB Clas stores the mac address of value is mac_address.
sn_imt_tracing.wifi_ble_client_owner_field	The field in the CMDB Clas identifies the owner of the access logs. The default va
sn_imt_tracing.wifi_ble_client_identification_fields	The fields in the CMDB Cla that identify the Wi-Fi asse client in the Wi-Fi access l mac_address,asset_tag.
Tracing system: Mist systems	
sn_imt_tracing.mist_api	API that accesses the Wi-F The default value is https:/ **Note:** This property a access logs using Mis
sn_imt_tracing.mist_visits_page_size	Maximum number of recor calls. The default value is 1 **Note:** This property a access logs using Mis
Tracing system: Cisco DNA Spaces	
sn_imt_tracing.wifi_proximity_preference	Level of proximity to consi an affected employee as p options are `30ft`, `Floor` value is 30ft.

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Properties for Contact Tracing (continued)

Property	Description
	Note: This property a proximity reports using
Properties that apply only if you collect Wi-Fi raw data from Cisco DNA Spaces using Wi-Fi raw data files	
sn_imt_tracing.wifi_log_sftp_server	URL or IP Address (for exa FTP (SFTP) server from wh data files imported into the [sn_imt_tracing_wifi_acces
sn_imt_tracing.wifi_log_sftp_port	Port on the SFTP server to the files.
sn_imt_tracing.wifi_log_sftp_file_path	File path on the SFTP serv files from Cisco DNA Spac For example, in the file pat `Daily/ServiceNow_D` • `/upload/Visit Dat` on the SFTP server when • `ServiceNow_Daily_` default file name that Cis the date and the upload For example, the default fil access data for 19 August `ServiceNow_Daily_V` `UTC.csv`: • `ServiceNow_Daily_` • `2020-08-19` is the dat captured • `0100` UTC is the time s Spaces to upload the file **Note:** Make sure tha have read and write ac
sn_imt_tracing.wifi_log_sftp_load_time	Time in HH:mm format whe uploads the day's Wi-Fi ac This timestamp is the last p access data file.
sn_imt_tracing.wifi_log_sftp_username	User name required to log

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Properties for Contact Tracing (continued)

Property	Description
	Note: Make sure tha a privileged user such Assign the minimal pri read the files in the di *sn_imt_tracing.* property.
sn_imt_tracing.wifi_log_sftp_password	Password required to log i
sn_imt_tracing.wifi_log_cisco_tier	Integration tier with Cisco access data. The available wifi_log_report. **Note:** This property integration with Cisco access data.
Tracing system: Kinexon SafeZone	
sn_imt_tracing.kinexon_api_endpoint	API endpoint used to log i instance and access KINE also used to fetch informa Replace the default endpo instance.
sn_imt_tracing.kinexon_api_username	KINEXON administrator us
sn_imt_tracing.kinexon_api_password	KINEXON administrator pa
sn_imt_tracing.kinexon_api_param_min_duration	The minimum duration of KINEXON sensors require potentially exposed conta values below this duration
sn_imt_tracing.kinexon_api_param_min_acc_duration	The minimum total duratio between two KINEXON se range. If the total duration query omits all records of sensors. The default value
sn_imt_tracing.kinexon_api_param_max_distance	The maximum distance (in sensors that determines w query omits any instances The default value is 2.
sn_imt_tracing.kinexon_api_param_max_time_gap_in_sequence	Determines the amount of between any two consecu before the potential expos exposures. The default val

Create or modify a diagnostic request task configuration

Create or modify a diagnostic request task configuration to auto-create a diagnostic request task in a diagnostic request. Based on the selected tracing system in the diagnostic request,

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the corresponding task configuration creates a diagnostic request task to identify potentially impacted employees.

Before you begin

The **Diagnostic Request Task Configs** module in the application navigator is available only if you have the Contact Tracing application installed.

Role required: admin

About this task

A diagnostic request task configuration is required only when a tracing system requires additional work to be performed to generate the diagnostic request report. For example, say you select the Wi-Fi access log tracing system in a diagnostic request, and Cisco DNA Spaces is the Wi-Fi input data source. You must work on a diagnostic request task to fetch potentially exposed employees by attaching a Wi-Fi access data file or generating a proximity report from the Cisco DNA Spaces portal.

Procedure

1. Navigate to **All** > **Emergency Exposure Management** > **Diagnostic Request Task Configs**.
2. Click **New**.
3. On the form, fill in the fields.

Diagnostic Request Task Config form

Field	Description
Name	Name of diagnostic request task configuration.
Import set table	Staging table in which records are imported from a data source before transforming those records.
Transform map	A set of field maps that define the relationships between fields in an import set and fields in the target table. For example, the target table to maps fields for Wi-Fi access data is Wi-Fi Access Register [sn_imt_tracing_wifi_access_register]. During transformation, data is copied from the Import Set table to the target table based on the transform map. A single import set field may be mapped to multiple fields on other tables.
Type	Data source type that is queried to identify the potentially impacted employees.
Active	Option for making the configuration active. Only active configurations can create a diagnostic request task.
Instructions	Set of instructions to process and complete the assigned diagnostic request task.

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Field	Description
Conditions tab	
Table	Diagnostic Request [sn_imt_diagnosis_diagnostic_request] table to check which data source is selected.
Condition	Conditions to get the selected data source in the diagnostic request.
Script condition	Script condition that evaluates any additional parameters.
Post processing tab	
Processing script	Script to run after the completion of the data import.

4. Click **Submit**.

Result
A diagnostic request task configuration for a data source type is created.

Identify potentially exposed users

When a user has indicated a health condition on a self-report, use Emergency Exposure Management to identify other users who might have come in contact with the affected user. You can analyze multiple data sources, such as location, meetings, workspace reservations, badge scans, and Wi-Fi access data of the affected user to identify potentially exposed users.

Before you begin
To query through multiple data sources, the Emergency Exposure Management requires the following applications, plugins, and configurations available on your instance.

Microsoft Office 365

Register and configure to scan Microsoft Outlook meeting data.

Contact Tracing

Badge reader scan, user daily contact log, Wi-Fi access log, handheld or wearable device proximity data, and visitor data.

Employee Health Screening and Contact Tracing

Scans visitor data.

Field Service Management (com.snc.work_management)

Scans field service task data.

Important:

If you are an on-premise customer with Microsoft Office 365 and you need assistance in configuring Emergency Exposure Management, contact your sales representative or contact Customer Service and Support at *https://support.servicenow.com/now?draw=case*.

Role required: sn_imt_diagnosis.diagnostics_admin or admin

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About this task

Note: You cannot create or run a diagnostic request for affected users who have not consented to use their data for contact tracing. For more information, see User privacy consent for Contact Tracing.

Procedure

1. Navigate to **All** > **Emergency Exposure Management** > **Create New**.
   The **Report generation status** field is set to **Not Initiated** and the **Active** check box is selected.
2. From the **Affected user** field, select the user's name.
3. Click the lock icon ( ) in the **Tracing system** field and select one or more tracing system options to query corresponding data sources.
   You can select multiple sources together for better identification of potentially impacted users.

Tracing systems and corresponding data source queries

Tracing system (Required application/plugin)	Query
Location	Users co-located with the affected user, for example, on the same floor or building.
Outlook meetings (Microsoft Office 365)	Users who accepted the same meetings as the affected user during the specified time period.
Workplace reservations (Workplace Core)	Users who had reservations for the same shifts as the affected user during the specified time period.
Badge reader (Contact Tracing)	Users who swiped their badge on the same badge reader devices as the affected user, during the specified time period.
Employee daily log (Contact Tracing)	The list of users with whom the affected users interacted during the specified time period.
Visitor log (Contact Tracing and Employee Health Screening)	The list of visitors who interacted with the affected user during the specified time period. Visitors who are invited by the affected user and have been screened through and let in are queried.
Wi-Fi access log (Contact Tracing)	Users who used the same Wi-Fi access points as the affected user during the specified dates. Wi-Fi access log data used to identify potentially impacted users depends on the Wi-Fi location preferences and the available integrations. For more information, see Retrieving Wi-Fi access log data. **Note:** Data received via a real-time API will be for a period based on the data retention policy of your Wi-Fi service provider.

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Tracing system (Required application/plugin)	Query
Handheld/Wearables (Contact Tracing)	Users using handheld or wearable devices in the close proximity with the affected user for more than the permissible time during the specified time period.
Kinexon SafeZone (Contact Tracing)	Users who with KINEXON wearables who were in close proximity with other KINEXON users during the specified dates. Data acquired from the KINEXON SafeZone API. Requires an active KINEXON integration. For more information, see Configure KINEXON integration. **Note:** Users who are required to agree to a privacy consent but have not done so are excluded even if they are potentially exposed contacts.
Field service (Field Service Management)	Customers attended by an affected field agent during the specified time period. Also queries other field agents who interacted with the affected agent or visited the same customer as the affected agent during the specified time period.

4. When required for a selected tracing system, provide the start and end dates.
   a. In the **Start date** field, provide the estimated date of infection.

      Because the infection window that you're concerned about may vary, pick a start date such as 14 days prior to the date of reported symptoms.

   b. In the **End date** field, provide the date of reported symptoms, at least one day prior to today.
5. Click **Save**.
   Related lists appear that are filled in after you run a diagnostics report.
6. Click **Run Diagnostics**.
   A scheduled job fetches potentially impacted user data from the selected sources and loads the data in corresponding related lists. Refresh a list to see the potentially impacted users immediately.

   If you selected the **Handheld/Wearables** option, a diagnostic request task is created. Follow the instructions in the task to fetch the potentially exposed users.

   If you selected the **Wi-Fi access log** option, the Wi-Fi data queried is based on the location preference set for the affected user's location. The available options are:

   - Mist Systems integration: The Wi-Fi data is fetched from Mist Systems when you run the diagnostic request.

     If the site network is Bluetooth LE-enabled and the organization has provided users with a BLE device, the Wi-Fi access using the BLE devices is used to identify potentially exposed users.

   - Cisco DNA Spaces integration: The Wi-Fi data is available based on the Cisco tier value set in the *sn_imt_tracing.wifi_log_cisco_tier* property:

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- If the *wifi_log_report* value is set, the data is imported from the Wi-Fi access data files for the specified days from the SFTP server and queried by the location path to identify potentially exposed users.
- If the *proximity_report* value is set, a diagnostic request task is created to fetch the potentially exposed users. Follow the instructions in the task to fetch data on potentially impacted users from the selected data source. For more information, see Fetch potentially exposed user data from a data source.

○ Manual import: The Wi-Fi data is imported from a Microsoft Excel spreadsheet into the Wi-Fi Access Register table.

7. **Optional:** Add manually the potentially affected users, for example, users who visited a location with an affected user.

   a. In the Impacted users added manually list, click **New**.

   b. Select the potentially affected user.

   c. Optional: Add comments about why you added the user.
   Entering comments helps identify other users who might be potentially impacted by this user if this user starts to show symptoms.

   d. Click **Submit**.

   The user appears in the Impacted users added manually related list.

Result

The related lists display potentially impacted users. The Impacted visitors, Impacted customers, and Impacted field agents related lists appear only if relevant users exist.

Note: Users who have not consented to use their data are filtered out from the list of potentially impacted users. However, you can add them to the potentially impacted users list manually.

Related lists and corresponding descriptions

Related list	Description
All Impacted users	All users who might have been potentially exposed. This list is a combination of all the records in the other related lists. Under the **Tracing system** column, you can see the source of the exposure for an user.
Impacted users added manually	This list is empty unless a user with the sn_imt_diagnosis.diagnostics_admin role manually adds additional potentially impacted users.
Impacted visitors	Visitors invited by the affected user who cleared the health screening and interacted with the affected user during the specified time period.
Impacted customers	Customers added from the field service work order analysis. Potentially impacted customers are determined by the work orders attended by an affected field agent between the specified dates.
Impacted field agents	Field agents added from the field service work order analysis. Potentially impacted field agents are determined if they interacted

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Related lists and corresponding descriptions (continued)

Related list	Description
	with an affected agent or visited the same customer as the affected agent between the specified dates.

Trouble?

If the diagnostics fail to run, click the **Show related jobs** link to check the status of all jobs that have been launched. You can view the details, including the log message, to determine the reason of failure.

Note: Failed jobs are automatically retried three times, the default setting in the Emergency Exposure Management properties. To retry the job after you fix the issue, click **Reprocess**.

What to do next

Depending on the applications and plugins installed, you can take the following actions:

- Click **Download Report** to download a spreadsheet listing all affected users. The report includes the email address and location of each user, and the source of identification, such as location, workplace reservation, collaboration, badge reader data, or field service work orders. For manually added users, the comment is included.
- Click **Download Visitor Report** to download a spreadsheet listing all potentially exposed visitors who met the affected user. The report includes the email address and name of each visitor.

  Note:

  The button is available only when you have selected the **Visitor log** tracing system.

- The case manager can create a case for the affected user and add potentially impacted users from the related list to the case to follow up on their health status. For more information, see Create a case for an affected employee.
- The manager of the affected field agents can take further actions such as blocking their future work order assignments. For more information, see Emergency Exposure Management for field service agents .

Fetch potentially exposed user data from a data source

Work on the diagnostic request task to get information about potentially impacted users from a selected data source and populate the corresponding related lists on the Diagnostic Request form.

Before you begin

Role required: sn_imt_diagnosis.diagnostics_admin or admin

About this task

The diagnostic request task is created from the diagnostic request task configuration for the data source type selected in the Diagnostic Request form. For more information, see Create or modify a diagnostic request task configuration.

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Procedure

1. Navigate to **Emergency Exposure Management** > **All**.
2. Open a diagnostic request from the list.
3. In the Diagnostic Request Tasks related list, open a diagnostic request task.
4. Follow the instructions in the task to fetch data on potentially impacted users from the selected data source.
5. If the task configuration requires you to manually close the task, select **Closed** in the State list.
6. Click **Update**.

Result

The state of the diagnostic request task updates to Close. The potentially exposed users from the data source are added to the corresponding related list on the Diagnostic Request form.

Fetch potentially exposed user data from Cisco DNA Spaces

Fetch potentially exposed user information from the Cisco Wi-Fi access log data and populate the corresponding related lists on the Diagnostic Request form.

Before you begin

Role required: sn_imt_diagnosis.diagnostics_admin or admin

Procedure

Access the potentially exposed user information through an attachment having the Cisco Wi-Fi access log data or by generating a report through the Cisco DNA Spaces portal.

Options	Steps
Attach a Wi-Fi access log file	**a.** Click the manage attachments icon (). **b.** In the Attachments window, click **Choose file** and select a Wi-Fi access log file. **c.** Select **Closed** in the State list. **d.** Click **Update**. The state of the diagnostic request task updates to Close.
Generate a report and post data through the Cisco portal	**a.** Log in to the Cisco DNA Spaces portal. **b.** On the Proximity Reporting page, click **Create Report**. **c.** Enter the start and end date for the report period. **d.** Select the **Auto-submit report data to ServiceNow task** check box. **e.** In the **Diagnostic Request Task #** field, enter the number of the diagnostic request task. **f.** Click **Generate Report**. The Cisco system creates a proximity report and puts the Wi-Fi access log data from the report into the Wi-Fi Access Register [sn_imt_tracing_wifi_access_register] table on the ServiceNow instance.

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Options	Steps
	The state of the diagnostic request task updates to Close.

Result

Cisco Wi-Fi access log data includes the proximity level of the users connected to the Cisco Wi-Fi network in the workplace. Based on the proximity level options set by the *sn_imt_tracing.wifi_proximity_preference* property (within 30 feet of the router, on the same floor, or in the same building), the potentially impacted users are identified from the Cisco Wi-Fi access logs. The information about these potentially exposed users populates the corresponding related list on the Diagnostic Request form.

Fetch potentially exposed user data from Zebra MotionWorks proximity report

Upload a spreadsheet containing the Zebra MotionWorks proximity data to fetch a list of potentially exposed users and populate the corresponding related lists on the Diagnostic Request form.

Before you begin

You must have downloaded the Microsoft Excel file from the Zebra MotionWorks Portal.
Role required: sn_imt_diagnosis.diagnostics_admin or admin

Procedure

1. Click the manage attachments icon ( ).
2. In the Attachments window, click **Choose file** and select a Zebra MotionWorks proximity report spreadsheet.
3. Select **Closed** in the State list.
4. Click **Update**.

Result

The Zebra MotionWorks proximity report contains a list of users equipped with handheld or wearable devices who were in close proximity to the affected user. The users who were inclose proximity for more than the permissible time with the affected user during the specified dates are identified from this proximity report. The information about these potentially exposed users populates the corresponding related list on the Diagnostic Request form.

Domain separation for Emergency Exposure Management

The following table lists the domain separation use cases for service providers (SPs) using this application.

Note: This information is subject to change: Limit use to SPs only.

Domain separation use cases for SPs

Use case	Functions	Limitations
SP Internal - SP uses the application for internal employees who might have collaborated with an affected internal employee.	Yes	None
SP External - SP uses the application to identify employees (SP or tenant) who might have collaborated with an affected employee (SP or tenant).	No	Without the domain column, there is no base system platform security that prevents an SP user who has access to the application from seeing tenant

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Domain separation use cases for SPs (continued)

Use case	Functions	Limitations
		information they would otherwise be restricted from seeing. “Limiting” Application Properties for Outlook settings.
Tenant -Tenant uses the application to identify employees who might have collaborated with an affected employee.	No	Without the domain column, there is no base system platform security that prevents a tenant user with access to the application from seeing other tenant information they would otherwise be restricted from seeing. “Limiting” Application Properties for Outlook settings.

Some modules in the Emergency Exposure Management application are affected by domain separation.

CREATE NEW & ALL module (Diagnostic Request)

- No domain column row protections or business logic exist.
- Creates a Diagnostic Event based on Outlook meetings, exposure to an affected user, or the user's location, to identify users who might have been potentially exposed through collaboration.
- Results from the Diagnostic Event return back to the Diagnostic Request or can be manually added.

Note: Because the Diagnostic Request record contains the User (Table: Sys_User) and Location (Table: Cmn_Location) fields, visibility to those reference fields is affected by domain separation. If a user is in a domain that does not have the appropriate visibilities granted, those fields appear empty in the Diagnostic Request even if they contain data.

PROPERTIES module

Standard Application Properties Page, all settings are global for the application.

Note: This property limits the ability of Outlook support in a domain-separated environment because tenants have different settings from the service provider.

- No domain column row protections or business logic exist.
- Captures the Outlook or Location responses and sends them back to the Diagnostic Request.
- Purely an admin function.

Safe Workplace for mobile

Manage the essential steps for return to workplace from anywhere using the Safe Workplace for mobile app.

The ServiceNow® Safe Workplace mobile experience enables organizations to manage the essential steps for returning users to the workplace from anywhere with the Now Mobile app.

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With an intuitive mobile design and user-friendly interface, organizations can deliver a seamless return to workplace experience, enabling users to complete health screenings and surveys, set up visits, make reservations, request PPE, and more to support their health and safety.

Application Views

Access other applications from Safe Workplace for mobile

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

Emergency and Safe Workplace Applications

Emergency Response Management applications	Safe Workplace applications
• Emergency Outreach • Emergency Self Report • Emergency Exposure Management	• Employee Readiness Surveys • Employee Health Screening • Workplace Core • Workplace PPE Inventory Management • Safe Workplace Dashboard • Contact Tracing • Health and Safety Testing • Employee Readiness Core • Enterprise Employee Experience Pack • Employee Travel Safety • Vaccination Status

Safe Workplace for mobile features

Safe Workplace (Mobile) Reporting and Notification Features

	Receive and respond to outreach notifications Receive important notifications generated in the Emergency Outreach application on your mobile device. You can also self-report your health status through these notifications. For more information about Emergency Outreach, see Emergency Outreach. For information on how to report your health status through push notifications, see Report your health status.
	Report your health status on the service response dashboard

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Safe Workplace (Mobile) Reporting and Notification Features (continued)

	Under My Current Health Status, click your name to report your health status. For more information, see Report your health status in Now Mobile.
	View the status of your direct reports As a manager, you can view **My Team's Health** in the **My Team** section to see an overview of the health of your direct reports. For more information, see Manage the status of your direct reports in Now Mobile.
	Reassign critical tasks to your working employees As a manager, you can tap **My Direct Reports Open Tasks** in the **My Team** section to see the work assigned to your direct reports. From this list, you can reassign tasks, as needed, to your working direct reports. For more information, see Reassign tasks to your team members in Now Mobile.

Mobile sections

If you've subscribed to the Safe Workplace suite, you see the Mobile sections available for Mobile experience for Emergency Response Management. Each section has multiple applications. To see all applications under a topic, scroll left.

Sections related to mobile application topics and features

Follow these safety practices	Health screening	Manage PPE inventory
Health surveys For more information, see Employee Readiness Surveys.	Screen employee For more information, see Conduct a health screen for entry.	Assign consumable For more information, see Assign PPE to employees.
Verify my health For more information, see Verify your health status and compliance.	Screen visitor For more information, see Screen a visitor for entry to the workplace.	Assign hardware For more information, see Assign PPE to employees.
Request PPE For more information, see Request PPE.	Scan for entry For more information, see Collecting user badge data.	Add consumable For more information, see Add PPE stock.
Daily contact log For more information, see Tracking employee contacts using daily logs.	Employee status For more information, see View your health and safety status.	Add hardware For more information, see Add PPE stock.
Privacy Consent		Add model

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Sections related to mobile application topics and features (continued)

Follow these safety practices	Health screening	Manage PPE inventory
For more information, see User privacy consent for Contact Tracing.		For more information, see Create models for PPE items.
Set up a visit For more information, see Invite a visitor to the workplace.		
COVID-19 Testing For more information, see Request a COVID-19 diagnostic test.		
Request travel permission For more information, see Request permission to travel.		
Report Vaccination For more information, see Report vaccination status to your organization.		
Request Vaccine Exemption For more information, see Request a vaccine exemption.		
Vaccine Exemption Requests For more information, see Request a vaccine exemption.		

Sections related to mobile health checks

My current health status	Prepare for arrival	My team
For more information, see View your health status in Now Mobile.	My readiness checklist Provides a checklist of tasks to complete prior to arriving at the work location.	My team's health Shows a list of your direct reports and their health status.
	My office entry code Provides a QR code that enables you to check into a work location.	My direct reports open tasks Shows all open tasks assigned to your direct reports that must be completed prior to arriving at a work location.

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Safe Workplace suite for federal customers

Federal customers using IL4 or FedRAMP environments will see the Safe Workplace suite applications ready and available to install on their nonproduction instances without having to make any special requests. Licenses are required to use Safe Workplace suite applications on production instances. Customers are responsible for configuring the apps to meet U.S. federal regulations and guidelines.

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

If you've subscribed to the Safe Workplace suite and you already have some of the apps installed, refer to the following order of installation for the remaining apps.

- Emergency Outreach (sn_imt_checkin)
- Employee Health Screening (sn_imt_monitoring)
- Workplace PPE Inventory Management (sn_imt_ppe)
- Employee Readiness Surveys (sn_imt_readiness)
- COVID-19 Global Health Data Set (sn_imt_c19datafeed)
- Contact Tracing (sn_imt_tracing)
- Emergency Self Report (sn_imt_quarantine)
- Workplace Core (sn_wsd_core)
- Safe Workplace Dashboard (sn_imt_dashboard)
- Emergency Response Management for Now Mobile (sn_imt_mobile)
- Employee Travel Safety (sn_imt_travel)
- Health and Safety Testing (sn_imt_health_test)
- Vaccination Status (sn_imt_vaccine)

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All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application. Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Install Safe Workplace for mobile

Install the Now® Mobile app and Safe Workplace for mobile app.

Before you begin

The Safe Workplace for mobile app (sn_imt_mobile) is dependent on the com.sn_imt_quarantine plugin.

The Safe Workplace for mobile app also has an optional dependency on other Safe Workplace applications. If you have any of these plugins installed, the corresponding applications will appear in your Safe Workplace for mobile app:

- sn_imt_checkin
- sn_imt_core
- sn_imt_monitoring
- sn_imt_ppe
- sn_imt_tracing
- sn_imt_travel
- sn_imt_health_testing

Role required: admin

Installation instructions for self-hosted and federal environments

Type	Instructions
Commercial on-premise	Visit the ServiceNow® Store to download and install the application.
Federal hosted	See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.

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Installation instructions for self-hosted and federal environments (continued)

Type	Instructions
Federal on-premise	If you are a federal on-premise customer and you would like to install this application, reach out to your sales representative or open a Now Support or HIWAVE ticket. In the ticket, request to be routed to the SHOT team. See the Federal downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030260] article in the Store Help Center for more information.
On-premise	See the Commercial downloads for the Emergency Response Management and Safe Workplace suite apps [KB0030258] article in the Store Help Center for more information.

Procedure

1. On your mobile device, download the Now Mobile app for Apple iOS or Google Android from the Apple App Store or the Google Play store.
2. In your instance, navigate to **System Applications** > **All Available Applications** > **All**.
3. Search for `Safe Workplace for mobile`.
4. Click **Install**.
5. In the Application installation dialog box, click **Install**.
6. When the installation is complete, click **Close**.
7. **Optional:** Control access to the application by creating a group and assigning roles to the group or individual users.

   (Optional) For more information, see Roles.

Report your health status in Now Mobile

Use the Now® Mobile app to report your health status.

Before you begin

Role required: sn_imt_quarantine.crisis_task_user

To access this content, you must have the Now Mobile app. Your instance must have the Emergency Self Report application installed.

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

Procedure

1. Open the Now Mobile app.
2. At the top of the Health page, click the quick action icon to open the self-report applet.

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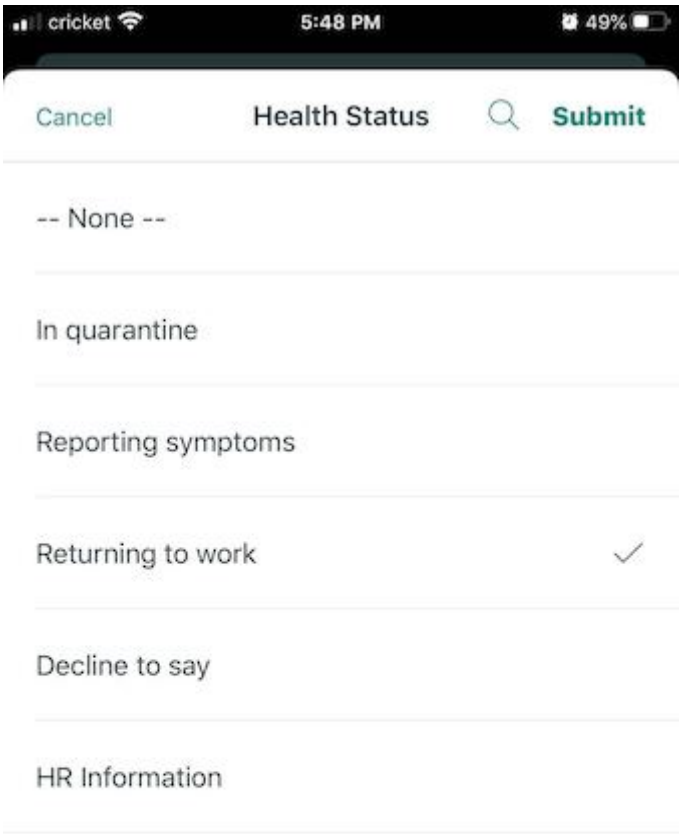
3. Select your health status from the list, and tap the check icon ( ) to confirm your status.



4. Click **Submit**.

View your health status in Now Mobile

Use the Now Mobile app to view your health status record.

Before you begin

Role required: none

To access this content, you must have the Now Mobile app. Your instance must have the Emergency Self Report application installed.

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

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Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

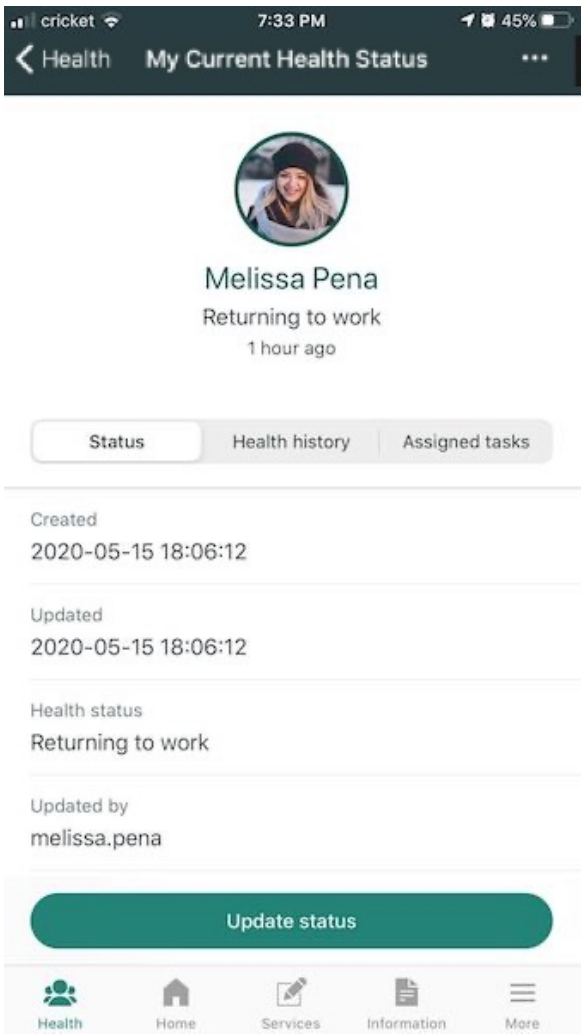
Procedure

1. Open the Now Mobile app.
2. Scroll down to **My Current Health Status** and click the **See All** link.
3. Click your name.

My Current Health Status screen

The **My Current Health Status** screen displays the following information:

- Use the **Status** tab to see your current reported status.
- Use the **Health history** tab to see a history of your health status updates.
- Use the **Assigned tasks** tab to see the tasks assigned to you.
- Use the **Update status** button to change your health status.
- If you're a manager, use the **Reassign all** action from the top menu icon ··· to reassign all your tasks.



Manage the status of your direct reports in Now Mobile

Use the Now Mobile app to view the health status of your direct reports.

Before you begin

To access this content, you must have the Now Mobile app. Your instance must have the Emergency Self Report application installed.

Role required: none

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

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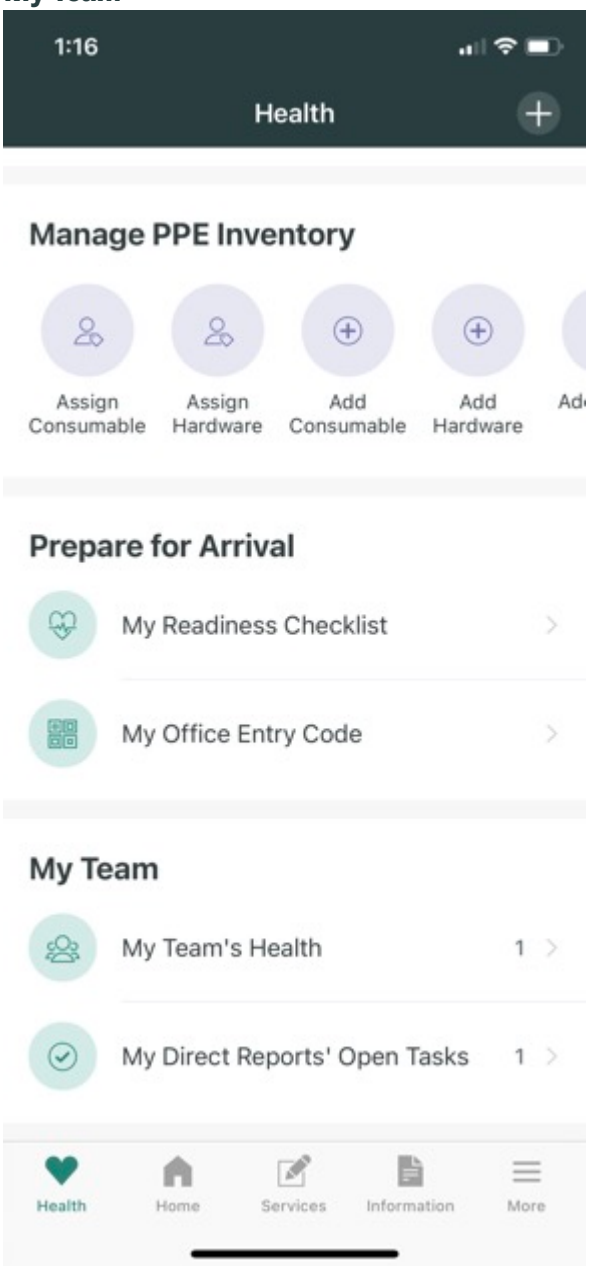
Note: The Emergency Response Management for Now® Mobile app was renamed to Safe Workplace for mobile.

Procedure

1. Open the Now Mobile app.
2. Scroll down to the My Team section and click the **My Team's Health** link.
   In the My Team's Health section, you can see a list of all your users.

My Team



3. In the My Team's Health section, a list of all your users and their status is displayed.

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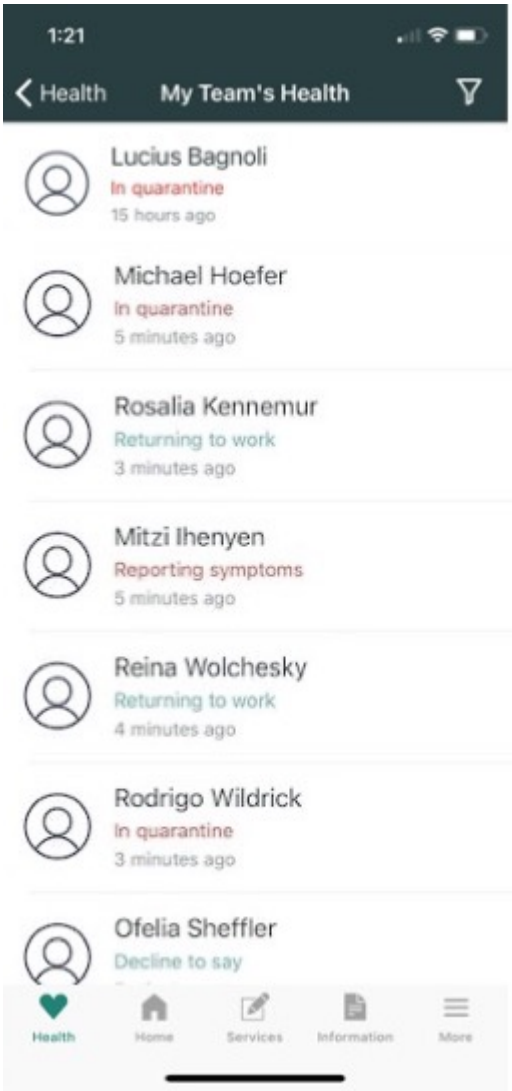
List of users and their status



4. **Optional:** Update the status for a user.
   - Swipe to the left on an entry in the list to update the user's status.
   - Tap on a record in the list and click **Update status** at the bottom of the task form.

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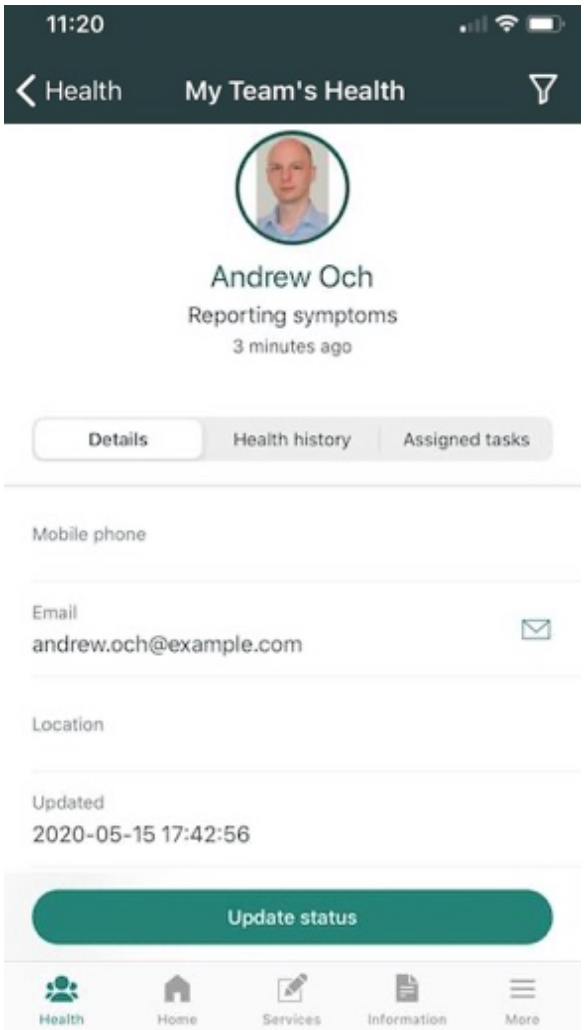
5. Tap an entry on the list to view the employee record screen.

Employee record screen

The employee record screen displays the following information:

- Use the contact and location information in the Details screen to keep in touch with your direct hires.
- Use the **Health history** tab to see a history of the user's health status updates.
- Use the **Assigned Tasks** tab to see the tasks assigned to the user.
- Click the **Update status** button to change the user's health status.



Reassign tasks to your team members in Now Mobile

As a manager, view a list of tasks assigned to your team members and reassign the tasks to other team members.

Before you begin

To access this content, you must have the Now® Mobile app. Your instance must have the Emergency Self Report application installed.

Role required: none

About this task

From the Safe Workplace for mobile app, users can access applications from the Emergency Response Management and Safe Workplace product suites.

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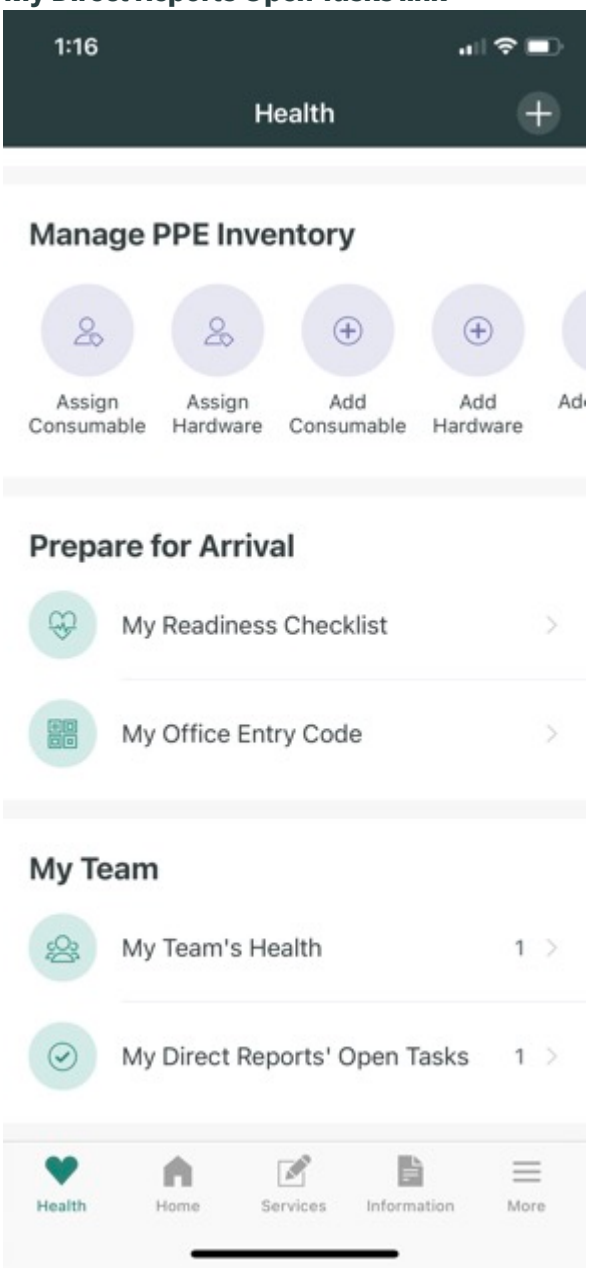
Procedure

1. Open the Now Mobile app.
2. Scroll down to the My Team section and click **My Direct Reports Open Tasks**.

My Direct Reports Open Tasks link



A list all open tasks assigned to your direct reports is displayed.

3. To view details about the task, click the open task.
4. To reassign a task, swipe left and click **Reassign**.
5. Search for a user that you want to reassign the task to and select the name of the user.
6. Click **Submit**.

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Legal and Contract Operations

Legal and Contract Operations empowers organizations to accelerate the delivery of legal and contract services by transforming manual, unstructured processes into a seamless digital experience.

Through Legal Service Delivery (LSD) and Contract Management Pro (CM Pro) of Legal and Contract Operations, transform fragmented and manual legal and contract processes into efficient and structured workflow. By replacing fragmented, manual processes with centralized request handling, automated workflows, and intuitive self-service, empower teams to operate with greater speed, precision, and agility.

- Legal Service Delivery provides a unified experience between the employees requesting legal support and the legal teams serving them.
- Contract Management Pro solution enables you to set up contract document templates, clauses, and clause variations, and to initiate contract and amendment requests. It also supports Now Assist driven contract analysis and metadata extraction, e-signatures, wet signatures, and external storage systems.

Legal and Contract Operations



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Get started

Contract Management Pro



Streamline your contract lifecycle with Contract Management Pro — bringing CLM capabilities, intelligent automation, and seamless integration into your workflow.

Legal Service Delivery



Learn how to automate or streamline routine legal requests to focus on higher value work.

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

ServiceNow Community

Connect with other Legal and Contract Operations users at ServiceNow Community.

ServiceNow University

Access real-time courses, self-paced training, and career resources, such as Legal Service Delivery (LSD) Essentials and more, from ServiceNow University.

Legal Service Delivery

ServiceNow® Legal Service Delivery provides a unified experience between the employees requesting legal support and the legal teams serving them.

Employees can request legal services from an interface with a guided intelligent workflow. Legal departments can automate or streamline routine legal requests so they can focus on higher value work.

The legal teams can use the ServiceNow® Legal Counsel Center that provides request visibility, a prioritized work queue, and practice-specific tools to manage complex legal affairs.

The following video provides an overview of Legal Service Delivery. Video providing an overview of Legal Service Delivery. Approximately five minutes long.

Benefits

Legal Service Delivery enhances your organization's in-house counsel and legal team processes by enabling self-service for employees.

- Provide employees with self-service experiences and faster resolution of legal requests
- Enable the legal department to focus on and prioritize time on more complex business affairs
- Gain insight to operations and drive efficiencies through Performance Analytics Legal Executive and Legal Operations dashboards.

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Legal Service Delivery applications

Legal Service Delivery includes the following key applications:

Legal Practice Apps Core

Legal Practice Apps Core is a required application for using all legal practice applications.

Legal Request Management

The ServiceNow® Legal Request Management application provides a single, unified mechanism for employees to get all the information, services, and help that they need from the legal department. Employees can submit legal requests, monitor their progress, and read legal knowledge base articles—all through an omni-channel experience across portal, mobile, and virtual agent channels.

Fulfillers can also designate requests as privileged and confidential using Attorney Client Privilege feature. When privileged and confidential is enabled, the system restricts access to authorized stakeholders, and marks communications with confidentiality banners. For more information, see Attorney-Client Privilege.

Legal Request Management is the core application in the Legal Service Delivery suite. All other applications that you choose to install require the installation of Legal Request Management.

Legal Matter Management

The ServiceNow® Legal Matter Management application enables you to complete legal requests that need cross-departmental tasking and workflow with a mechanism to store documents and track important milestones. With its embedded record level security, you can maintain the confidential and sensitive information of each record.

Matter templates help you with standardized process and workflow for various matter types.

Matter owners and fulfiller can also designate requests as privileged and confidential using Attorney Client Privilege feature. When privileged and confidential is enabled, the system restricts access to authorized stakeholders, and marks communications with confidentiality banners. For more information, see Attorney-Client Privilege.

Legal Practice Applications

Legal practice applications in the Legal Service Delivery suite provide solutions for the specific needs of different legal practice areas.

Legal Content Review

The ServiceNow® Legal Content Review application provides a mechanism to raise a legal review request of any marketing material, collateral, or presentation contents and to resolve the issues.

Legal Digital Forensics

The ServiceNow® Legal Digital Forensics application enables you to handle digital forensics requests for data discovery related to custodial and non-custodial data sources that are subject to investigations or litigation.

Legal Investigations

The ServiceNow® Legal Investigations application enables the Legal department in your organization to accept internal complaints through a simple intake process.

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Employees can submit complaints either by name or anonymously through the Anonymous Reporting Center portal. The legal team can conduct legal investigations, including conducting interviews, gathering evidence, and preparing final reports with recommended actions to address these complaints.

Legal Simple Contracts

The ServiceNow® Legal Simple Contracts application enables employees to submit legal requests for getting legal support and guidance for contracts. For example, they can submit legal requests for the creation of Non-disclosure Agreement (NDA) documents with third parties or the review of sales contracts or third-party contracts. The legal department can manage and process them from a centralized location.

Legal Simple Privacy

The ServiceNow® Legal Simple Privacy application provides a mechanism to raise a Privacy Assessment request to resolve privacy related concerns.

Legal Hold Notification

The ServiceNow® Legal Hold Notification application helps organizations manage their legal obligations to preserve relevant information when a legal hold is issued. It enables you to submit a legal hold matter, add custodians, send notices, and close the legal hold matter, to ensure legal and regulatory compliance.

Legal Simple Compliance

The ServiceNow® Legal Simple Compliance application provides prebuilt legal workflows to submit and manage legal compliance requests. The Legal Simple Compliance includes the following applications.

Gifts and Entertainment Compliance

The ServiceNow® Gifts and Entertainment Compliance enables you to manage disclosures from employees giving or receiving gifts or entertainment to internal or external parties to ensure they comply with company policies.

Legal Conflict of Interest

The ServiceNow® Legal Conflict of Interest application enables you to manage the disclosure, approval, and registry of conflict of interests that might arise from employees having competing interests or loyalties.

Legal Stock Preclearance

The ServiceNow® Legal Stock Preclearance application enables you to manage stock preclearance requests complying with the company's stock preclearance policy. You can set up trading windows, manage an access list, and approve or reject stock preclearance requests.

Now Assist for Legal Service Delivery (LSD)

Use the ServiceNow® Now Assist for Legal Service Delivery (LSD) application to summarize a legal request or legal matter, generate actionable answers from Knowledge article search results. You can also a submit Conflict of Interest request using conversational intake from the Now Assist panel in Virtual Agent.

Legal Counsel Center

The ServiceNow® Legal Counsel Center application enables lawyers to solve issues faster with a workspace built to facilitate resolutions. From a single view, get the full context of legal issues to resolve them quickly.

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External Legal Service Center

The ServiceNow® External Legal Service Center application enables external users like customers, partners, and the public to directly contact your organization for legal information. They can ask for clarifications, submit concerns, and get the legal information they need. This access fosters trust and shows organization's commitment to accountability and legal compliance.

Performance Analytics Content Pack for Legal Service Delivery

Performance Analytics Content Pack for Legal Service Delivery Performance Analytics Legal Executive dashboard

Use the Performance Analytics Legal Executive dashboard to get an insight into how your team and business are performing for resolving legal service requests. General counsel and practice area leads can make data-driven decisions through insights into legal operations using various preconfigured reports and metrics. You can view the details for top request categories, requests by user locations, practice area, and requesting department, SLA compliance of legal requests and legal matters, average number of requests handled per attorney, and average time to close legal requests and legal matters over time.

Virtual Agent for Legal Service Delivery

Legal Virtual Agent Conversations

The ServiceNow® Legal Virtual Agent Conversations application provides predefined conversation topics to enable automated chats with employees seeking legal services. You can build new topics or customize predefined topics to handle common legal requests from employees or guide them through self-service tasks.

Mobile experience for Legal Service Delivery

Use the following ServiceNow® mobile apps to work on the Legal Service Delivery applications.

Now Mobile app

The Now Mobile app enables your employees to get legal information and support through their mobile device. They can submit legal requests, track the status of requests, and read knowledge articles.

Mobile Agent app

The Mobile Agent app enables the legal department users to resolve legal requests and legal matters assigned to them using the Mobile Agent app.

For more information, see Legal Mobile.

Domain separation for Legal Service Delivery applications

The Legal Service Delivery applications support domain separation at the Basic level. For more information, see Domain separation and Legal Service Delivery. For more information on support levels, see Application support for domain separation.

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

ServiceNow Community

Connect with other Legal Service Delivery users at ServiceNow Community.

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ServiceNow University

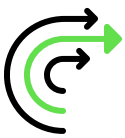
Access real-time courses, self-paced training, and career resources, such as Legal Service Delivery (LSD) Essentials and more, from ServiceNow University.

Legal Request Management

The ServiceNow® Legal Request Management application provides a unified mechanism for employees to get all the information, services, and help that they need from the legal department and a streamlined, collaborative process for the legal department to quickly resolve these requests.

Employees can submit legal requests, monitor their progress, and read legal knowledge base articles across a web portal, mobile platform, and Virtual Agent.

Legal teams can collaborate in a centralized Legal Counsel Center to manage legal intake volume, resolve legal requests, and monitor work analytics.

Explore  Learn about how employees, paralegal staff, and lawyers use Legal Request Management.	**Set up**  Set up practice areas, intake forms, and other configurations.	**Request**  Submit and track legal requests.
Manage  Manage legal requests.	**Analytics and Reporting**  Coordinate work and improve processes with preconfigured dashboards.	**Reference**  Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Exploring Legal Request Management

Legal Request Management enables authorized employees in the organization to submit legal requests and to track their progress while users in the legal department with appropriate roles can work to resolve these requests.

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Legal Request Management overview

Employees can read legal knowledge base articles, submit legal requests, monitor the progress of submitted requests, and interact through Virtual Agent.

Legal Request Management users

Users

User	Description
Legal Configurator	Legal Configurator configures data such as practice area, category, and legal matter templates.
Legal Fulfiller	Legal Fulfiller works on assigned legal requests and matters.
Legal User	Legal User submits legal requests and tracks their progress. Can work on assigned tasks related to matters.

Legal Request Management configuration workflow

The following sample end-to-end workflow shows how different users can work together to configure the foundation data and submit, review, and legal requests and matters.

1. Administrator configures a practice area table.
2. Legal Catalog Administrator creates a legal catalog category
3. Legal Configurator performs the following actions:
   a. Creates a practice area.
   b. Adds an intake form to a practice area.
4. Legal Configurator or Matter Configurator create a rule to automatically assign legal requests or matters.
5. Legal Administrator activates a system property to close a long-running legal request.
6. Request Configurator performs the following actions:
   a. Creates a record producer for legal services, using Catalog builder.
   b. Configures an external storage system for legal requests and legal matters.
7. Legal Configurator creates or modify a response template for legal services.
8. Administrator performs the following actions:
   a. Configures an Action for legal services on the Standard ticket page
   b. Enables and configures AI Search in Legal Service Portal

Legal request and legal matter workflow

A workflow for a legal request might progress as following:

1. Legal User submits a legal request.
2. Legal Fulfiller performs the following actions as required:
   a. Assigns the legal request.
   b. Marks the request as privileged and confidential.
   c. Manages attachments for a legal request.

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d. Initiates an ad hoc approval for a legal request or its attachment.

e. If required, promotes a legal request to a legal matter.

3. If required Request Fulfiller can transfer a legal request.

4. Legal Fulfiller closes the legal request on fulfilling it.

Legal Request Management benefits

Legal Request Management benefits

Benefit	Feature	Users
Remove manual, unstructured email processes and tasks with an easily accessed self-service experience	Legal Request Management	• Legal Configurator • Legal Administrator, Legal Fulfiller • Legal User • Legal Catalog Administrator • Request Configurator
Automate responses for common legal requests with virtual agents	Legal Virtual Agent Conversations	Legal Fulfiller
Make meaningful decisions by gaining real-time visibility on legal service demands	Analytics and Reporting Solutions for Legal Service Delivery	Practice Area Lead
Track, prioritize, and work on multiple requests concurrently with an optimized Legal Counsel Center	Legal Counsel Center	Legal Fulfiller
Attorney Client Privilege enables legal fulfillers to mark legal requests as privileged and confidential. This capability helps you protect sensitive legal communications and comply with attorney-client privilege requirements.	Attorney-Client Privilege	• Legal Fulfiller • Collaborator • Practice Area Lead

What to explore next

To learn more about configuring and using Legal Request Management, see:

- Configuring Legal Request Management
- Using Legal Request Management
- Managing legal requests
- Legal Request Management reference

Attorney-Client Privilege

Attorney Client Privilege functionality enables legal fulfiller to designate legal requests as privileged and confidential. It restricts access to authorized stakeholders, marks communications

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with confidentiality banners, and maintains a document audit trail to help you protect sensitive legal communications.

Attorney Client Privilege applies to following:

- Legal Request: Legal fulfillers can mark legal requests as privileged and confidential, when the request is in Assigned or Work in Progress state. The system enforces access control, adds confidentiality markers to emails, and restricts collaboration to authorized stakeholders.
- Legal Matter: Legal fulfillers and matter owners can independently mark or unmark individual matters as privileged and confidential, provided the matter is in the Assigned or Work in Progress state.

The Attorney Client Privilege feature is not available for legal contracts requests. Example: Non-disclosure Agreement (NDA) and Third-party Contracts submitted using Contract Management Pro for Legal Service Delivery application.

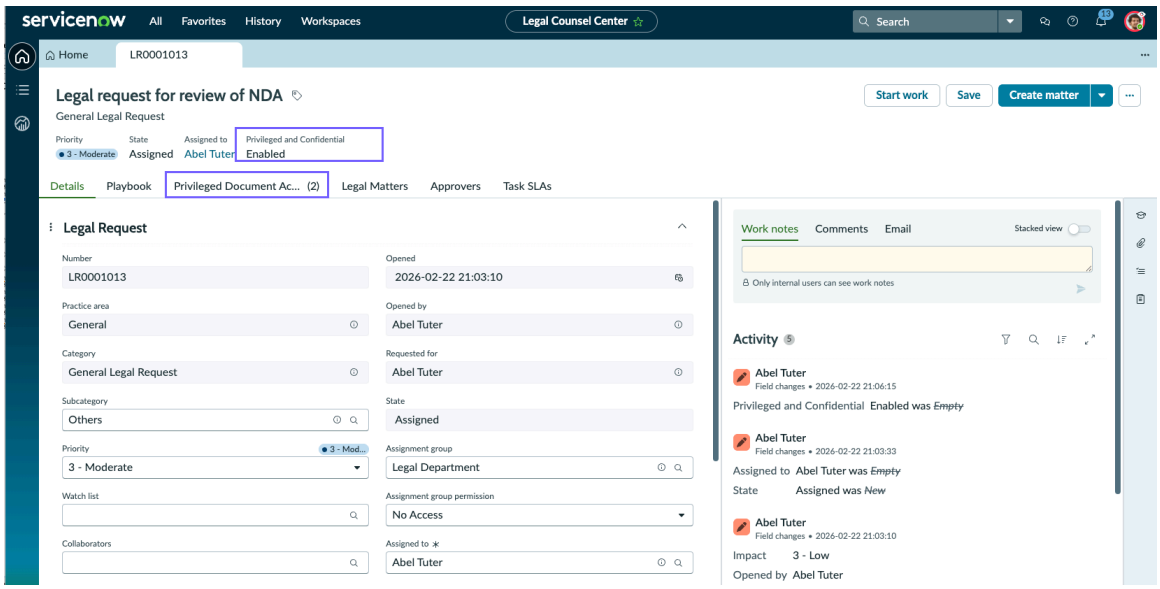
Assignment group permission changes

When Privilege and Confidential is enabled on a legal request, the system automatically updates the assignment group permission to No access.

Indicators of a privileged and confidential marked request

You can identify a privileged and confidential request by following UI elements.

- Privileged and Confidential flag: Displayed in the secondary header of the request when it is marked as privileged and confidential.
- Privileged document access related list to display the permission of each attachment.



Email notifications

Email notifications generated for Privileged and Confidential marked requests, contain confidentiality markers to comply with legal requirements. This applies to both system-generated notifications and fulfiller-initiated outbound emails.

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Stakeholder change notifications

When the collaborator list, watchlist, or fulfiller assignment is modified for a privileged and confidential request, the system sends email notifications to the requester, fulfiller, and collaborators. Notifications are triggered when:

- A new collaborator is added to the request.
- A new watchlist entry is added.
- The fulfiller assignment changes.

All notifications for privileged and confidential requests include the confidentiality markers.

Promote legal request to legal matter

You can promote a legal request to legal matter by creating a new matter or adding to an existing matter.

- When legal request is promoted by creating a new matter, the Privileged and Confidential status of the created matter is dependent on the Privileged and Confidential status of the request. You can change the status later.
- When legal request is promoted by adding to an existing matter, the Privileged and Confidential status of the existing matter is retained irrespective of the Privileged and Confidential status of the request.

The Privileged and Confidential status of a legal request and its associated matter are tracked independently. Changing the Privileged and Confidential status of a request does not automatically change the Privileged and Confidential status of the associated matter, and vice versa.

Related topics

Work on a legal request

Disable attorney client privilege for a legal request

Manage attachments for a legal request

Transfer a legal request

Configuring Legal Request Management

Configure the foundation data to provide legal request services to employees who can use these services to submit requests to the legal department.

Configuration overview

1. Practice areas

   Set up the practice areas specific to law practices such as Intellectual Property, Privacy, or Compliance. Associate categories to the practice area and assign a legal department user as the practice area lead.

2. Catalog categories

   Create catalog categories to group legal services that employees can use to find a specific legal service request on the Legal Service Portal.

3. Record producers

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Create record producers to define the intake forms for legal request services. These record producers are available in the Legal Operations Catalog on the Legal Service Portal. Employees can use them to submit legal service requests.

4. External storage system

   Configure an external storage system to store documents attached to legal requests and legal matters . The integration with an external storage system enables organizations to have a centralized documentation management and retention policy.

5. Response templates

   Configure a response template with a reusable message that legal fulfillers can use to send users quick and consistent messages through work notes, comments, emails, or chat conversations.

   Each response template is associated with a table and can be configured to include field variables from that table. You can use a condition builder to specify the conditions that a legal request or legal matter must meet for the template to be usable through the configured channels. For example, you can define a condition to enable response templates only for legal requests of type digital forensics.

   Also, for chat response templates, you can specify a short name that can be used as a shortcut with the slash command to present the response message to a user quickly.

6. Email notifications Create or modify email notifications that are sent when specific events occur. Some possible event triggers might be: When a request is assigned to a legal department member to work on, a request is closed or canceled, or a message is posted to get additional information.

   New email notification templates are available for Legal Service Delivery applications from Legal Request Management 4.2.2 version onwards when you also have the Employee Center installed. You can differentiate them from the existing ones by the *EC:* prefix in their names.

   - These email notifications are active by default for new installations of Legal Request Management 5.0 version and later versions.
   - These email notifications are inactive by default when you upgrade from Legal Request Management version earlier than 5.0. You must manually activate them while deactivating the existing notifications.

     To activate the email notifications based on the applications installed, the admin can run the following scripts:

     - `Activate EC email template for legal req`: Activates email notifications for Legal Request Management.
     - `Activate EC email template for lg matter`: Activates email notifications for Legal Matter Management.
     - `Activate EC email template lg contracts`: Activates email notifications for Legal Simple Contracts.

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- `Activate EC email template for Legal COI`: Activates email notifications for Legal Conflict of Interest.
- `Activate EC email template for lg stock`: Activates email notifications for Legal Stock Preclearance.

Note: Links in the new email notifications navigate to either Employee Center or Legal Counsel Center based on the user's role:

- For requesters, the link in the email opens the Standard Ticket page in the Employee Center portal.
- For legal fulfillers, the link in the email opens the record form in the Legal Counsel Center.

7. Legal dispositions of legal request or legal matter

   Add the Legal Disposition [sn_lg_ops_legal_disposition] table, which stores dispositions from legal requests and legal matters, as a related list to any Legal Request or Legal Matter form. For more information on adding a related list on a form, see Add a related list to a form.

Install Legal Request Management

You can install the Legal Request Management application (sn_lg_ops) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- If the application requires plugins or other store applications, install them first if they are not already installed.
- Review the Legal Request Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Activate the following ServiceNow plugins in your instance before you install the Legal Request Management application:

- Workspace Core (com.workspace_core)
- Checklist (com.glide.ui.checklist)

Role required: admin

About this task

The following components are installed with installation of the Legal Request Management application:

- Plugins
- Store applications
- Roles
- Tables
- Tables specific to practice areas
- Business Rules

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For more information, see Components installed with Legal Request Management.

You can also install the following applications:

Legal Counsel Center application (sn_lg_cf_workspace)

The ServiceNow® Legal Counsel Center application enables lawyers to solve issues faster with a workspace built to facilitate resolutions. From a single view, get the full context of legal issues to resolve them quickly.

Legal Mobile (sn_lg_mobile)

The ServiceNow® Legal Mobile (sn_lg_mobile) application enables you to find legal information, submit and track legal requests, and work on these requests on mobile devices. For more information, see Legal Mobile.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Request Management application (sn_lg_ops) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Request Management.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

What to do next

Use the Legal Service Delivery Guided Setup to configure the application on your instance.

To access Legal Service Delivery Guided Setup, navigate to **Legal Administration** > **Legal Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Configure a practice area table

Configure a practice area table so you can use fields from legal request and legal matter tables to include in the Lists section of Legal Counsel Center.

Before you begin

Role required: admin

About this task

The record producer uses variables to store field information submitted via intake forms for a legal request or legal matter. If you have to use any of these variables as columns in the list view in Legal Counsel Center, you must add them as columns in the respective practice area

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tables. These practice area tables extend the Legal Request [sn_lgs_ops_request] table for legal requests and the Legal Matter [sn_lg_matter_matter] table for legal matters. For more information, see Practice area tables for legal requests and Practice area tables for legal matters.

Note: For using practice area tables for legal matters, you must have the Legal Matter Management installed.

Procedure

1. Add new columns in a practice area table that you want to use to create reports for legal requests or legal matters submitted for the practice area.
   For more information, see Add and customize a field in a table.
2. Create or modify a record producer for a legal request or legal matter for the associated practice area.
   For more information, see Create or modify a record producer for legal services through Classic environment.
3. Update the business rule to synchronize variables with the mapped table columns when users modify the intake form data after they've submitted a legal request or matter.

   a. Navigate to **System Definition** > **Business Rules**.

   b. Open the *Sync variable with mapped columns* business rule.

   c. In the **When to run** tab, add a new OR condition for the category.
   For example, to synchronize the variables of a Compliance intake form with the mapped columns of the Compliance [sn_lg_ops_compliance] table, you would enter the following OR condition:

   [Category] [is] [Compliance [sn_lg_ops_compliance]]

   For more information, see Create a business rule.

Create or modify a legal catalog category

Create or modify a catalog category to organize your legal catalog items into logical groups in the Legal Operations Catalog.

Before you begin

Role required: sn_lg_ops.legal_catalog_admin

Procedure

1. Navigate to **All** > **Legal Administration** > **Legal Catalog** > **Maintain Categories**.
2. Create or modify a catalog category.
   - To create a catalog category, click **New**.
   - To modify an existing catalog category, open the catalog category from the list.
3. On the form, fill in the fields.

Category form

Field	Description
Title	Unique name of the catalog category.

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Field	Description
Catalog	Name of the catalog to which the category belongs. Select **Legal Operations Catalog**.
Location	Location relevant for the category.
Description	Description about the category. The description appears under the catalog category name when you select the category on the Legal Service Portal.
Application	Application scope in which the category is applicable.
Active	Option for making the category available on the portal.
Parent	Legal catalog category that is the parent for this category.
Desktop image	Large image that appears with the category on the portal.
Icon	Small icon that appears next to the category name when the category is listed as a subcategory.
Header icon	Icon that appears next to the category header when the category is a top-level category.

4. Click **Submit**.

Result
The service catalog category is created. The catalog categories are listed in the **Service catalog category** field on the Practice Area form.

What to do next
- Associate a record producer with the category using the Catalog Item related list.
- Associate the catalog category with a practice area to map the practice area, record producer, and catalog category together. This mapping helps employees to use the relevant categories to submit legal requests. In turn, these requests are assigned to the correct groups or users through the associated practice area.

  For more information, see Create or modify a practice area.

Create or modify a practice area

Create or modify practice areas for specific areas of law practice, such as Intellectual Property, Privacy, or Compliance.

Before you begin
Role required: sn_lg_ops.legal_config

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Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Click **New**.
3. On the form, fill in the fields.

Practice Area form

Field	Description
Name	Unique name of the practice area.
Active	Option for making the practice area active. Legal requests can be submitted only for active practice areas.
Service catalog category	Name of the catalog category under which the new intake forms for the practice area are organized in the Legal Service Portal. **Note:** This field is applicable only if you use the Legal Service Portal for legal services. To enable legal services on the Employee Center, use the taxonomy mapping. For more information, see Legal services on the Employee Center portal.
Description	Description of the practice area.

4. Click **Submit**.
   The practice area is created and the Intake Forms and Practice Area Leads related lists are displayed.
5. Add one or more users as the lead for the practice area.

   A practice area lead can view all unassigned requests related to the practice area and assign them to practice area members.

   a. In the Practice Area Leads related list, click **Edit**.

   b. On the Edit Members form, select one or more users from the **Collection** list and click **Add** to add them to the **Practice Area Leads List**.
   Only the users of the **Legal Practice Area Leads** group are listed in the **Collection** list.

   c. Click **Save**.
   The selected users are added to the Practice Area Leads related list.

What to do next

Add an intake form to a practice area from the Intake Forms related list.

Add an intake form to a practice area

Add an intake form to a practice area to associate it with a record producer and define assignment rules and service level agreements.

Before you begin

Role required: sn_lg_ops.legal_config

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Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Open a practice area to which you want to add an intake form.
3. In the Intake Forms related list, click **New**.
4. On the form, fill in the fields.

Intake Form form

Field	Description
Name	Unique name of the intake form.
Default subcategory	Default subcategory to associate with the intake form.
Practice area	Practice area to which the intake form belongs.
Short description	Brief description of the intake form.
Record Producer section	
Type	Type of record producers to associate with the intake form. You can select from the following options: ○ **Request**: The practice area lead cannot promote requests submitted under this practice area to a legal matter. ○ **Matter**: Legal department users can submit a matter under this practice area. ○ **Request and Matter**: The practice area lead can promote requests submitted under this practice area to a legal matter. During promotion, the field values from the legal request record are copied over to the matter record.
Request record producer	Record producer to submit requests in the associated practice area. Select an existing request record producer or use the **Create Request record producer** related link to create one. The newly created request record producer contains default values for a few fields that will be pre-populated in the request form. **Note:** The **Create Request record producer** related link appears only when this field is empty. This field appears only when **Request** or **Request and Matter** is selected as the Type value.
Matter record producer	Record producer to create a legal matter.

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Field	Description
	If a matter can be created directly, associate an existing matter record producer. To create and associate a new matter record producer, click the **Create Matter record producer** related link. **Note:** The **Create Matter record producer** related link is available when this field is empty. This field appears only when **Matter** is selected as the Type value.
Default matter template	Matter template that is selected by default while promoting the associated legal request to a matter. This field appears only when **Matter** or **Request and Matter** is selected as the Type value.
Options	Options to change the default behavior or flow of legal requests, legal matter, or both as per your business needs. You can select from the following predefined options: ○ **Assigned To field not mandatory**: The **Assigned to** field on the Legal Request form becomes an optional field. ○ **Disable Request Adhoc Approvals**: Legal fulfiller working on the legal request cannot initiate an ad hoc approval for requests or attachments. The **Initiate Approval** button will not be available on the Legal Request form. ○ **Disable Request Reopen**: The requester cannot reopen a legal request that has been closed. The **Reopen Request** button is not available on the Standard Ticket page. ○ **Editable Assignment group in Request**: The practice area lead, group manager, and legal fulfiller (user in the **Assigned to** field) can change the assignment group in a legal request. **Note:** On changing the assignment group, a member of the existing group member who is not in the updated assignment group might lose access to the request. The **Assigned to** field is also cleared.

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Field	Description
	○ **Editable Assignment group in Matter**: The practice area lead, group manager, and legal fulfiller (user in the **Assigned to** field) can change the assignment group in a legal matter. **Note:** On changing the assignment group, a member of the existing group member who is not in the updated assignment group might lose access to the matter. The **Matter owner** field is also cleared. ○ **Enable External Storage for attachment**: The documents attached to legal requests and legal matters are uploaded to a configured external storage system. **Important:** Only one external storage provider can be configured for an intake form. ○ **Enable Legal Request creation From Universal Request**: Legal requests can be created from a universal request to get the support of the Legal department for the resolution of the universal request. ○ **Make Request Fulfiller as Matter Owner**: When a legal request is promoted to a legal matter, this legal matter is automatically assigned to the legal request fulfiller. ○ **Generate Document from Template**: When a legal request for contract review is submitted, this option determines whether the document will be generated using a document template. If this option is not selected, the requester must submit the contract for review. **Note:** The option is available only for the sn_lg_ops_contract_request table. ○ **Update request fields with variables**: When you submit a legal request for contract review or update the variables, the field values mapped to the variables are automatically updated.

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Field	Description
	○ **Initialize legal contract**: A contract request is automatically created when a legal request for contracts is submitted. ○ **Amendment request indicator**: When you submit a request this option will determine if the request is of type amendment.

5. Click **Submit**.
   An intake form is added to the practice area. The Checklist section and related lists to manage subcategories, service level agreement definitions, assignment rules, and matter templates appear.
6. **Optional:** Add to-do items in the Checklist section to provide a list of activities for the request fulfiller.
   When an employee submits a new legal request through the intake form, this predefined checklist appears as the default to-do items in the corresponding request.
   a. Click the more actions icon (⊙) next to the **Checklist**.
   b. Click **Create new**.
   c. Enter a description for the to-do item and press the Enter key.

What to do next

- From the Subcategories related list, add a new one subcategory to associate it with the intake form.
- From the SLA Definitions related list, create a service level agreements (SLA) definition, if required.
- From the Assignments Rules related list, create an assignment rule for an intake form.
- Click the **Edit in Catalog Builder** related link to update the record producer for a legal request or matter or both based on the **Type** field value. For more information, see Create or modify a record producer for legal services through Catalog Builder.

  The admin can also create or modify record producers for legal services.
- From the Matter Templates related list, associate a matter template with the intake form if a matter record producer is selected.

Add a subcategory for the intake form

Add a subcategory to an intake form of a practice area to organize legal requests and assignments through the intake form.

Before you begin

Role required: sn_lg_ops.legal_config

About this task

Note: You can associate a subcategory with the same name to many intake forms. However, an intake form cannot have multiple subcategories with the same name.

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Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Open a practice area.
3. In the Intake Forms related list, open an intake form in which you want to add a subcategory.
4. In the Subcategories related list, click **New**.
   If you are not able to see the **New** button in the current application scope, select the word here in the message at the top of the page to set the correct application scope for displaying the button.
5. In the **Subcategories** field, enter a unique name of the subcategory
6. Select the **Active** check box to indicate whether the subcategory is active.
7. Click **Submit**.

Associate a matter template with an intake form

Associate a matter template with an intake form that can be used when promoting a legal request to a legal matter to include predefined data.

Before you begin

Note: The Matter Template related list is available on the Intake Form form only when you have selected **Matter** or **Request and Matter** as the **Type** value.

Role required: sn_lg_ops.legal_config or sn_lg_matter.matter_config

About this task

When an existing matter template is updated and published, the intake form reflects the latest version of the associated matter template.

Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Open a practice area.
3. Open the intake form from the Intake Form related list to which you want to associate a matter template.
4. In the Matter Template related list, associate an existing matter template or create and associate a new matter template.

Option	Steps
Associate an existing matter template	**a.** Click **Edit**. **b.** Move the required template from the **Collection** list to the **Matter Templates List**. **c.** Click **Save**.
Create a template and associate it with the intake form	**a.** Click **New**. **b.** Create a legal matter template. In the **Intake form mapping** field of the Matter Template form, ensure that the current intake form is selected.

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Result
The selected matter template is associated with the intake form.

Assigning legal request

Legal requests can be automatically assigned via an assignment rules or Advanced Work Assignment. You can also use Predictive Intelligence to predict the assignment group.

For assigning legal request adopt any one of the following solutions:

- Use assignment rules to directly assign legal requests. For more information, see Assignment rule to automatically assign legal requests or matters.
- Use Advanced Work Assignment for Legal Service Delivery to assign legal requests to agents. This feature considers availability, capacity, and optionally, skills. For more information, see Advanced work assignment for Legal Service Delivery.
- Use Predictive Intelligence for Legal Service Delivery which uses machine-learning algorithms to predict the subcategory and assignment group. Predictions with high confidence are automatically populated in the fields, while predictions with low and medium confidence are displayed as suggestions. For more information, see Predictive intelligence for Legal Service Delivery.
- Use both assignment rules and Predictive Intelligence for Legal Service Delivery. For predictions with high confidence, the value for the assignment group is automatically updated in the field. For predictions with low and medium confidence, the suggestions are displayed and the assignment rule functionality populates the assignment group based on your configurations.

Assignment rule to automatically assign legal requests or matters

Create an assignment rule for an intake form to assign the associated legal request or matter to a user or group.

Before you begin
Role required: sn_lg_ops.legal_config or sn_lg_matter.matter_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Open the intake form from the Intake Form related list.
3. In the Assignment Rules related list, click **New**.
4. On the form, fill in the fields.

Assignment Rule form

Field	Description
Name	Unique name of the assignment rule.
Active	Option for marking the assignment rule active. A legal request is assigned to a group or user based on active assignment rules only.
Applies To tab	
Table	Name of the table to which the assignment rule applies.

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Field	Description
Conditions	Conditions under which the assignment rule applies. For example, to apply a rule when a legal request is submitted in a Privacy category, you would enter the following condition: **[Category][is][Privacy]**.
Assign To tab	
User	User to whom the legal request is assigned.
Group	User group to which the legal request is assigned.

5. Click **Submit**.

Result
An assignment rule with conditions is created. Any legal request or matter that meets the rule's conditions is assigned to the specified group or user.

Activate a system property to close a long-running legal request

As an admin, activate the `sn_lg_ops.allow_request_closure_with_open_matters` system property to close legal requests even when they're linked to long-running requests.

Before you begin
Role required: sn_lg_ops.legal_admin

About this task
`sn_lg_ops.allow_request_closure_with_open_matters` is a configurable system property that is used to configure a legal request to close even though it is linked to long-running requests. The property has no dependency on any other feature. By default, the property is set to **False** and legal requests can't be closed when they are open. To close legal requests even if the primary legal request is open, activate the property by changing it to **True**.

Procedure
1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `sn_lg_ops.allow_request_closure_with_open_matters` property.
3. Select the property.
4. If you aren't able to edit the property in the current application scope, select the word **here** in the message at the top of the page.
5. Update the **Value** field to `true`.
6. Select **Update**.

Result
The `sn_lg_ops.allow_request_closure_with_open_matters` system property is activated and the related legal requests can be closed even if the primary legal request is open.

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Configure number of records to display in search suggestions

As an administrator, configure the sn_lg_cf_workspace.workspace_typeahead_list_count system property to specify the number of records that appears in the suggestion list of a typeahead search in legal requests.

Before you begin

Role required: sn_lg_cf_workspace.admin

Procedure

1. Navigate to **All** and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.
2. In the **Name** column, search for the `sn_lg_cf_workspace.workspace_typeahead_list_count` property.
3. Select the property.
4. In the **Value** field, specify the number of records to display in the suggestion list of a typeahead search.
5. Select **Update**.

Managing record producers for legal services

A record producer helps you set up a legal intake form containing fields that a requester has to fill in and initiate a legal request.

A record producer for a legal service is associated to a practice area and appears under a service catalog category defined in the practice area. The practice area also has the service level agreement and assignment rules configured. Based on the assignment rules, the request is assigned to an appropriate legal group or legal user to resolve.

Create or modify a record producer for legal services through Classic environment

Create or modify a record producer to define an intake form for a legal request. Employees can use these intake forms on the Legal Service Portal to submit legal requests.

Before you begin

Ensure that you have the Legal Request Management application scope selected.

Role required: sn_lg_ops.legal_catalog_admin

About this task

To manage record producers using Catalog Builder, see create or modify a record producer for legal services through Catalog Builder.

Procedure

1. Navigate to **All** > **Legal Administration** > **Legal Catalog** > **Record Producers**.
2. Create or modify a record producer.
   - To create a record producer, click **New**.
   - To modify an existing record producer, open the record producer from the list.
3. On the form, fill in the fields.

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Record Producer form

Field	Description
Name	Unique name of the record producer.
Table name	Name of the table that stores the data collected through the record producer. ○ Select **Legal Request [sn_lg_ops_request]** if you are creating the record producer for legal requests. ○ Select **Legal Matter [sn_lg_matter_matter]** if you are creating the record producer for legal matters. **Note:** You must have installed the Legal Matter Management app to use this option. ○ Select a table specific to a practice area if you want to use the data collected from the record producer for reporting. For more information, see Configure a practice area table.
Application	Application to which the record producer belongs. This field is automatically set to the application scope in which you are creating the record producer.
Active	Option for marking the record producer active. Only active record producers are available as legal intake forms in the Legal Service Portal.
What it will contain tab	
Short description	Brief description of the record producer.
Description	Full description of the record producer.
Script	Script that dynamically assigns values to specific fields on the created record.
Accessibility tab	
Catalogs	Name of the service catalog to which the record producer belongs. Select **Legal Operations Catalog**.
Category	Name of the service catalog category in which the intake form should appear in the Legal Service Portal.

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4. Save the record producer.
   - Save a new record producer by clicking **Submit**.
   - Save the changes to an existing record producer by clicking **Update**.
5. In the Variables related list, add or modify variables.
   Variables in a record producer appear as fields on the legal intake form to collect information from employees when they're submitting a legal request.

   > **Important:** If you are configuring the record producer for a practice area table, you must map the variable with a column name of the selected table. On the Variable form, select the **Map to field** check box and the column name of the selected practice area table in the **Field**. Only the mapped variables are copied to the columns of the selected table.

   For more information on creating variables, see Create a service catalog variable.
6. In the Assigned topics related list, assign the catalog item to a topic in a taxonomy so that the catalog item is added to the Employee Center portal.
   For more information on assigned topics and taxonomy, see Unified Taxonomy for Employee Center.
7. In the Applicable For and Not Applicable For related lists, apply the user criteria to control access of the record producer.
   User criteria define conditions for user records that enable you to grant or deny access to the record producer for users matching those conditions. For more information on creating a user criteria, see Set up the user criteria.
8. If you have enabled the option to save attached documents for a legal request in an external storage, you can add the script to validate the documents attached to a legal request while submitting.

   a. In the Catalog Client Scripts related list, click **New**.

   b. On the Catalog Client Scripts form, fill in the fields.
   For more information, see Create a Service Catalog client script.

   c. In the **Script** field, copy the following client script which runs on the catalog item to determine if:
      - The file size of the document being uploaded is within the permitted limits.

        This check applies to Microsoft OneDrive external storage.
      - A file with the same name already exists in the folder.

```
var status = true;
        var uniqueNames = [];
        var duplicateNames = [];
        var largeFileNames = [];
        var attachments =
 this.angular.element("#sc_cat_item").scope().attachments;
        attachments.forEach(function(attachment) {
            var name = attachment['file_name'];
            var size = getSizeInBytes(attachment['size']);
            if (uniqueNames.indexOf(name) != -1) {
                duplicateNames.push(name);
            } else if (size > 4000000) {
                largeFileNames.push(name);
```

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```
            }
            uniqueNames.push(name);
        });
        if (largeFileNames.length > 0) {
            g_form.addErrorMessage("Size of file should be
 less than or equal to 4Mb");
            largeFileNames.forEach(function(name) {
                g_form.addErrorMessage(name + " is more than
 4Mb");
            });
            status = false;
        }
        if (duplicateNames.length > 0) {
            g_form.addErrorMessage("File names should be
 unique");
            duplicateNames.forEach(function(name) {
                g_form.addErrorMessage(name + " found with a
 duplicate name");
            });
            status = false;
        }
        return status;
    }
}
function getSizeInBytes(size) {
    var unit = size.split(" ")[1];
    var value = parseFloat(size.split(" ")[0]);
    switch (unit) {
        case "MB":
            value = value * 1000000;
            break;
        case "KB":
            value = value * 1000;
            break;
    }
    return value;
}
```

Create or modify a record producer for legal services through Catalog Builder

Create or modify a record producer using a catalog template to define an intake form for a legal service. Employees can use these intake forms on the Legal Service Portal to submit a legal request or legal matter.

Before you begin

Role required: sn_lg_ops.request_config or sn_lg_matter.matter_config

About this task

Use the following base system catalog item templates installed with Legal Request Management to create a record producer for legal services:

- **Legal request intake form template**: For creating a record producer for legal requests
- **Legal matter intake form template**: For creating a record producer for legal matters

For more information about catalog item templates and catalog items, see Catalog Builder.

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Procedure

1. Open Catalog Builder from the application navigator or from an intake form.

Option	Steps
From an Intake form	**a.** Open an intake form that has a record producer selected. **b.** Click the **Edit in Catalog Builder** related link.
From the application navigator	**a.** Navigate to **All** > **Service Catalog** > **Catalog Builder**. **b.** Create or modify a record producer. ▪ To create a record producer, on the **Dashboard** tab, click **Create a new catalog item**. ▪ To modify an existing record producer, click the **Catalog items** tab and open the record producer from the list. **c.** Review the steps involved in the creation process and click **Continue**. **d.** Select a template from the list, review the template preview, and click **Use this item template**.

2. Based on how each step is defined in the template, specify the required information. For more information, see Create a catalog item using a template.

   In addition to entering other details, make sure to provide the following information for a record producer for a legal service:

Record producer for legal service

Step	Field and default values from the template
Destination	**Table**: ○ For legal requests: Default is **Legal Request [sn_lg_ops_request]**. You can select a practice area table for legal requests as required. ○ For legal matters: Default is **Legal Matter [sn_lg_matter_matter]**. You can select a practice area table for legal matters as required.
Location	○ **Catalogs**: Default is **Legal Operations Catalog**. ○ **Categories**: Legal Request for legal requests and Legal Matter for legal matters. You can select a different catalog and category based on your requirements.

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Step	Field and default values from the template
Access	○ **Available for**: ▪ For legal requests: Default is **Users with legal_user role**. ▪ For legal matters: Default is **Legal Matter Catalog**. Select users with specific roles who are granted access to the record producer. ○ **Not available for**: Select users with specific roles who are denied access to the record producer. **Note:** If you don't specify a user criteria in any option, access is granted to everyone. For more information on creating a user criteria, see Set up the user criteria.

3. To save your changes in each step, click **Save**.
   All edits to the item attributes are automatically saved when you navigate to the next step.
4. To preview the record producer, click **Preview**.
5. In the **Review and Submit** step, review the record producer and click **Submit** to publish the record producer in the selected catalog.

Configure an external storage system for legal requests and legal matters

Configure an external storage system to store documents attached to legal requests and legal matters.

Before you begin

Ensure that the administrator has installed and set up spokes for the external storage system you want to configure for legal apps.

Box spoke v3.1.0 or later version

For more information on the setup and creating the Box account, see Set up Box spoke.

Google Drive spoke v1.3.0 or later version

For more information on the setup and creating the Google Drive account, see Set up Google Drive spoke.

Microsoft OneDrive spoke v2.1.0 or later version

For more information on the setup and creating the Microsoft OneDrive account, see Set up Microsoft OneDrive spoke.

Microsoft SharePoint spoke v2.2.0 or later version

For more information on setting up Microsoft SharePoint, see Configure Microsoft SharePoint Online connection record.

iManage Spoke spoke v1.0.0

For more information on the setup and creating the iManage account, see Set up iManage spoke.

Important: After setting up the spoke, give the iManage spoke user [sn_imanage_spk.user] role to users accessing iManage external storage.

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Role required: sn_lg_ops.request_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Legal Integrations** > **Integrations**.
2. Create or modify an external app configuration.

Option	Steps
To create an external app configuration	**a.** Select **New**. **b.** On the Integration Type page, select the **External Storage** link.
To modify an existing external app configuration	Open the external app configuration from the list.

3. On the form, fill in the fields.

External Storage form

Field	Description
Name	Name of the external app configuration.
Description	Description of the external app configuration.
Active	Option for marking the configuration for external storage as active.
Table	Table in which the legal request or legal matter information is stored. For example, ○ To store documents for a legal request, select the **Legal Request [sn_lg_ops_request]** table. ○ To store documents for a legal matter, select the **Legal Matter [sn_lg_matter_matter]** table. ○ To store documents for a contract request, select the **Legal Contract [sn_lg_contracts_repository]** table. The selected table determines the available variables in the **Select variables** field.
Condition	Filter conditions to determine saving documents for a specific request category. For example, say you've already configured the Box external storage integration and want only NDA contract documents to be stored there, you can define the condition as **[Category] [is] [NDA]**. Then, select the external storage name in the **App** field.
Execution order	Order in which an external storage system is used for storing documents.

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Field	Description
	When multiple external storage systems match the conditions, then the one with the lower-order value is chosen to store the documents.
App	External storage system on which the documents are stored. **Note:** The list only shows external storage systems for which spokes have been installed and configured.
Folder structure	Filepath to store documents attached to a legal request or legal matter in the external storage system. Define a folder structure using a combination of static text and dynamically generated text from the selected field variables in the **Select variables** list. For example, in the folder structure `Legal/${company}/Contracts/${number}`, ○ `Legal` and `Contracts` are static texts ○ `${company}` and `${number}` are the field variables chosen from the **Select variables** list. These field variables are dynamically replaced by the values in each field while saving a document in the external storage.
Select variables	List of variables that can be used in the folder structure. Variables pull information from the selected table to customize the folder structure.
Attributes	Additional configuration items based on your Microsoft SharePoint and iManage configuration. Add the following details: *Microsoft SharePoint* ○ **Tenant**: Add the sys_id of the Microsoft SharePoint tenant record. ○ **Site_Name**: Add the name of the site in the tenant. ○ **Document Library**: Add the document library set up in the site where all documents related to legal requests and legal matters are stored. For more information on managing Microsoft SharePoint tenants, sites, and document libraries, see the Microsoft documentation. These fields appear only when **SharePoint** is selected from the **App** field. *iManage*

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Field	Description
	○ **Library**: When a value is specified, the application uploads documents using the designated library. This can also include the creation or using the Workspaces, folders, and so on. This attribute is optional, so if the library is not provided, the preferred library of the iManage service account user is used. ○ **Workspace_type**: Captures the type of Workspace to support the various use cases. For example: ▪ **Shared**: Use an existing Workspace to upload documents. ▪ **Independent**: Create a separate Workspace for every request and matter. This helps in effectively organising and tracking the documents. Independent Workspace may or may not use a template. ○ **Template_ID**: Unique identifier of the template from iManage. The application uses the identifier to create iManage objects such as Workspaces, folders, and subfolders using the template configurations while uploading the documents. This attribute is used when the Workspace_type is Independent. You can use templates to maintain consistent names and folder structure for Workspaces created in iManage. ○ **Folder_path**: Used to identify the folders or subfolders, in which the document is uploaded. This attribute is used when the Workspace_type is Independent. ○ **Shared_workspace_ID**: Unique identifier of the Shared Workspace. This is used to identify the Workspace to upload the documents when Workspace type is Shared. For more information on iManage, see iManage documentation. **Note:** iManage login credentials are required to access the documentation.

4. Save the external app configuration.
   - Save a new external app configuration by selecting **Submit**.
   - Save the changes to an existing external app configuration by selecting **Update**.

   The external storage configuration is saved.
5. Select **Publish**.

Result
The external storage system integration is published and is ready for storing documents attached to legal requests.

What to do next
Add the **Enable External Storage for attachment** option in the intake forms so that the documents attached to those legal requests or legal matters are stored in the configured external storage. For more information, see Add an intake form to a practice area.

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Configure the system properties for Legal Service Delivery apps to administer integration with the external storage provider. For more information, see Legal Service Delivery properties.

Integrating Legal Service Delivery applications with iManage storage

Integrate iManage storage with Legal Service Delivery applications to provide more security to the files.

You can integrate iManage storage with Legal Service Delivery applications.

The three types of Integrations are:

- Shared Workspace — To use an existing Workspace and folder to upload documents, use the Shared Workspace when needed. For example, you may want to organize the documents by Practice areas. So, you'd follow a shared Workspace scenario where the legal request or legal matter related folders are created inside the existing Workspace and the documents are uploaded to the folders.
- Independent Workspace using a template — To track every request or matter separately and upload documents, use the Independent Workspace when needed. Using a pre-defined iManage template helps you maintain consistent names and folder structure for the Workspace in iManage. The documents are uploaded using the folder mentioned in the Folder_path field.
- Independent Workspace without a template — When you want to track every request or matter separately and upload documents respectively using the folder mentioned in the Folder_path field, use the Independent Workspace.

Shared Workspace

In Shared Workspace, workspaces are shared between the ServiceNow® users registered on iManage and iManage storage.

Shared Workspace attribute details

Attribute	Optional/Mandatory	Sample Values (Manual input)
Library	Optional	None
Workspace_type	Mandatory	Shared
Template_ID	Not applicable	Not applicable
Folder_path	Not applicable	Not applicable
Shared_workspace_ID	Mandatory	Legal!123

- **Folder structure**: <folder>/${number}.
- **How it works**: When a document is uploaded, the application uses an existing Workspace (Legal) and reuses the primary folder. The application creates the folder under this folder hierarchy using the legal request or legal matter number and uploads the document in this path.

  The following example shows the document is uploaded in the specific folder.

  Note: If any of the folders don't exist, then the application creates them first and subsequently uses them. In this example, it is ${number}.

  Legal (Workspace) > Folder > LR001.

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Independent Workspace using a template

Independent Workspace using a template attribute details

Attribute	Optional/Mandatory	Sample values
Library	Optional	None
Workspace_type	Mandatory	Independent
Template_ID	Mandatory	LegalTemplate!120
Folder_path	Mandatory	Documents
Shared_workspace_ID	Not applicable	Not applicable

- **Folder structure**: ${number}.
- **How it works**: The application creates a Workspace using the value provided in the folder structure field as the workspace name and creates the folders as defined in the template. In this example, LegalTemplate!123 is the Template_ID that is used as the template. Then use the folder path provided in the Folder_path field to upload the document to the folder in the path. In this example, the document file is uploaded to the Documents folder.

  The following example shows the document is uploaded in the specific folder:

  `LR001 (Workspace) > Documents (Folder)`.

Independent Workspace without a template

Independent Workspace without a template attribute details

Attribute	Optional/Mandatory	Sample Values (Manual input)
Library	Optional	None
Workspace_type	Mandatory	Independent
Template_ID	Not applicable	Not applicable
Folder_path	Mandatory	Documents
Shared_workspace_ID	Not applicable	Not applicable

- **Folder structure**: ${number}.
- **How it works**: The application creates a Workspace using the value provided in the folder structure field as the workspace name. The application then creates a folder using the Folder_path field information and uploads the document to the last folder.

  The following example shows the document is uploaded in the specific folder:

  `LR001 (Workspace) > Documents (Folder)`.

Create implementation in Scripted Extension Point

Create the implementation in the Scripted Extension Point, provided out-of-the-box, by placing it in the script include in the base application code.

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Before you begin

The application scope must be changed to the specific application for which the implementation in the Scripted Extension Point is targeted.

Role required: You must have the specific role for the developer or administrator of the application, or you must have the admin role.

About this task

If you want to send additional information while uploading the document, you must create the implementation in the Scripted Extension Point and store it in custom fields in the iManage Workspace. The custom fields are preset on the iManage and must be enabled for mapping. For example, <custom field 1> is mapped to Practice Area, <custom field 2> is mapped to Category, <custom field 3> is mapped to Requested by, and so on.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for **sn_lg_ops.iManageCustomFieldHelperExtension** in the API Name field, under the Legal Request Management application scope.
3. Select the record to open.
4. Select the **Create implementation** in the related link section.
5. On the form, fill in the fields.
   For more information, see Scripted Extension Point form fields.

Result

The Implementation is created in Scripted Extension Point. For more information on how to use the script include for Scripted Extension point, see Use the script include for Scripted Extension Point.

Use the script include for Scripted Extension Point

Use the script include for Scripted Extension Point to update the custom fields on the iManage storage based on the mapping provided in the functions.

The processes below explain how to implement the script include for Scripted Extension Point.

- On the script include form, the script field is auto populated with the structure of expected function definitions. For more information on script include form, see Script includes.
- In the script include, the function have inputs that is available when the implementation is called.
- In case of iManage Extension Point (sn_lg_ops.iManageCustomFieldHelperExtension), following are the function definition, expectation and possible outputs:

Function names, expected results, and possible outputs

Function Name	Usage Information	Output
canHandle	Input: TableName: Name of the table of which the current record is being processed. Use: This function is used to identify whether this implementation should be executed if the TableName	True/False True: The current execution should be executed. False: The current execution shouldn't be executed.

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Function Name	Usage Information	Output
	you are passing is using the same condition that is defined in the function. Example: In Legal Request Management, you have the input as tableName to identify if this implementation is for the same table. The possible script would be as follows: `canHandle: function(tableName) { return tableName == "The target table of implementation "; },`	
Process	Input: requestRecord: GlideRecord object of the current legal record which is being processed. Use: This function is used to create mapping between the iManage Fields and the fields of the legal record. Example: In Legal Request Management, you have the GlideRecord object of the current legal table record in concern, which is used to get the values of the record fields and map to the custom fields in the process function. The possible script would be as follows: `process: function(requestRecord) { return { custom1: requestRecord.getDisplayValue("practice_area"), custom2: data, custom4: requestRecord.requested_for.country, description: requestRecord.description }; },`	`{ custom1: requestRecord.getDisplayValue(“p custom2: requestRecord.getValue("descript`

Scripted Extension Point form fields

List of fields in the Scripted Extension Point.

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Scripted Extension Point form fields

Field	Description
Name	Unique name for the extension point. The name can be up to 100 alphanumeric characters, including special characters.
API Name	Name of the extension point API that is pre-pended with the application scope to which it applies. This is a system-assigned name and can't be changed.
Application	Application to which the extension point is assigned. This is system-assigned and can't be changed.
Accessible from	Application scope that defines the applications that can access this scripted extension point. The available values are: • All application scopes — Can be accessed from any application scope. • This application scope — Can be accessed from the current application scope.
Active	Option to enable the scripted extension point.
Description	Descriptive content regarding the scripted extension point.
Script	The server-side script to run when called from other scripts. The script must define a single JavaScript class or a global function. The class or function name must match the **Name** field.
Client callable	Options to make the scripted extension point available to client scripts, list/report filters, reference qualifiers, or, if specified, as part of the URL.

Create or modify a response template for legal services

Create or modify a response template with a reusable message that legal fulfillers can use to send users quick and consistent messages. They can use these reusable messages in their assigned legal requests or legal matter forms, as well as in chat sessions or emails.

Before you begin

Ensure that the Templated Response plugin (com.sn_templated_snip) is installed.

Role required: sn_lg_ops.legal_config

About this task

Response templates are reusable messages that can be used by the legal fulfillers to respond to stakeholders of a legal request or legal matter. For more information, see Response templates.

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Procedure

1. Navigate to **All** > **Legal Administration** > **Response Template Configuration**.
2. Create or modify a response template.
   - To create a response template, click **New**.
   - To modify an existing response template, open it from the list.
3. On the form, fill in the fields.
   For field descriptions, see Response Template form.
4. Save the response template.
   - Save a new response template by clicking **Submit**.
   - Save the changes to an existing response template by clicking **Update**.

   The response template is created and the Channels related list appears.
5. Associate one or more channels through which the response template can be used.
   A response template is only available through the channels that you select. You can provide different messages by creating response templates for each channel, such as chat, email, or form.

   a. In the Channels related list, click **Edit**.

   b. On the Edit Members form, select one or more channels from the **Collection** list and click **>** to add them to the **Channels List**.

   c. Click **Save**.
   The selected channels are added to the Channels related list.

Result
The response template is ready to be used by the legal fulfiller through the configured channels.

Configure an Action for legal services on the Standard ticket page

Add or modify an Action and its functionality on the Standard ticket page for a legal request.

Before you begin

- Review the configuration of the script include, scripted extension points and service portal widgets for legal services installed with the Legal Service Delivery apps.
- The Actions is one of the sections of a standard ticket page of the Service Portal, so get familiar with the Standard ticket page and Service Portal.
- For more information about configuring service portal widgets, see Service Portal widgets.
- For more information about using and customizing the script includes, see Script includes.
- Ensure that you've set the application scope to Legal Request Management.

Role required: admin

About this task
The base system `DefaultLegalTicketActions` script provides the configuration of common actions for all legal request types. You can override these common actions for a specific legal request type or add more actions.

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Procedure

1. Add or modify an action in the scripted extension point.

   a. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.

   b. Search and select the **LegalTicketAction** extension point.

   c. Add or modify an implementation for a practice area.

   - To add a new implementation for a practice area, click the **Create implementation** related link.

     On the Script Include form, update the script as required.

     i. To restrict this implementation to the practice area, add the following code to the *canHandle* parameter:

     ```
     canHandle: function(tableName) {
             return tableName == '<TableName>'; //Replace TableName with a practice area table name
         },
     ```

     ii. To add a new action, update the *process* method.

     For reference, see an existing *process* method of the `DefaultLegalTicketActions` script include or the implementation of another practice area.

   - To modify an existing implementation, open a class from the Implementations related list.

     On the Script Include form, update the script as required.

     - To modify an existing action, update the *name* parameter in the JSON object to match the one in the `DefaultLegalTicketActions` script.

       For example, to change the Cancel action's default behavior in a specific practice area, open its extension point implementation keep the *name* parameter as `cancel` while modifying other parameters in the JSON object as required.

     - To add a new action, create a JSON object and change the name and other parameters as required.

   d. Click **Update**.

2. **Optional:** Configure Actions widgets on the standard ticket page for legal services.

   a. Navigate to **All** > **Service Portal** > **Widgets**.

   b. Search and select the **Legal Ticket Actions** widget.

   c. Review the existing script and Angular ng-template for reference and then add or modify them as required.

   d. Click **Update**.

Enable and configure AI Search in Legal Service Portal

The ServiceNow® AI Search application provides a modern consumer-grade search engine for the Legal Service Portal.

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Before you begin

Role required: admin

Procedure

1. Add the sys_id of the Legal Service Portal record to the system property that includes the supported portals.
   a. Navigate to **All** > **Service Portal** > **Portals**.
   b. Open the Legal Service Portal record and copy its sys_id.
   c. Open the System Properties table [sys_properties], search, and open *`glide.service_portal.enable_ais_portal.allow_list`*.
   d. In the **Value** field, append the sys_id of Legal Service Portal record.
   e. Click **Update**.
2. Update the Legal Service Portal record.
   a. Navigate to **All** > **Service Portal** > **Portals**.
   b. Open the Legal Service Portal record.
   c. Select the **Enable AI Search** check box.
   d. In the **Search Application** field, select **Legal Service Portal Default Search Application**.
   A search application configuration defines search experience settings, such as the search engine, search results limit, and suggestions limit. A search application configuration is selected by default, but you can change it as needed. For more information on defining a search application configuration, see Search application configurations.
   e. In the **Search Results Configuration** field, select **Legal Portal Search**.
   A search results configuration defines how search results are displayed. A search results configuration is selected by default, but you can change it as needed. For more information on defining a search results configuration, see Create an EVAM definition.
   f. Click **Update**.

Delegation of legal duties and approvals

Legal fulfillers can delegate their legal duties to other users while they are unavailable. The delegate gets the same level of access as the legal fulfillers to work on their legal requests, legal matters, legal matter tasks, and approvals.

Legal Service Delivery supports the following delegations:

ServiceNow AI Platform delegation

This delegation method is active by default. This delegation enables lawyers to delegate all items to the delegate. However, while adding a delegate, lawyers can limit the delegation options:

- Delegate only approvals
- Delegate only assignments
- Delegate both approvals and assignments
- Delegate notifications

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Granular delegation

Granular delegation enables lawyers to choose which items from their assigned legal requests, legal matters, legal matter tasks, and approvals they want to delegate.

Note: This delegation method requires activation of the Granular Delegation plugin (com.glide.granular_service_delegation).

Before lawyers can use the delegation, the administrator must configure the delegation rule tables, delegation rules, and the **My Delegate** workspace list in the Legal Counsel Center Classic Workspace:

- Set the **My Delegate** workspace list on the Granular Delegate [sys_granular_delegate] table as active.
- Set the **My Delegate** workspace list on the Delegate [sys_user_delegate] table as inactive.

For the new experience Legal Counsel Center Workspace, open *<instance>/sys_ux_list_list.do?sysparm_query=titleLIKEMy%20Delegates*.

The **My Delegate** UX list must be configured as follows:

- The **My Delegates** list on the Granular Delegate [sys_granular_delegate] table must be active.
- The **My Delegates** list on the Delegate [sys_user_delegate] table must be inactive.

A task is delegated when it matches the delegation rules specified for a delegation. For example, you can delegate only the Privacy Assessment requests. A delegation rule can be set on the Legal Request [sn_lg_ops_request] table with the condition as **[Category] [is] [Privacy]**.

Related topics

Setting up Granular Delegation

Delegate legal duties to another user

Delegate legal duties relating to your assigned legal requests, legal matters, legal matter tasks, and approvals to another user when you might not have time or are unavailable.

Before you begin

Role required: legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Set Delegate**, click **My Delegates**.
4. In the My Delegates list, click **New**.
5. On the form, fill in the fields.

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Delegate form

Field	Description
User	User who delegates legal duties to a delegate.
Delegate	User to whom you are delegating legal duties assigned to you. **Note:** The delegate must be from the assignment group of which you are a member.
Starts	Start date of the delegation period.
Ends	End date of the delegation period.
Approvals	Option to delegate approvals. Select this option to authorize the delegate to approve or reject the approvals you've been assigned.
Assignments	Option to delegate assignments. Select this option to grant the delegate the same level of access to all approvals, legal requests, legal matters, and matter tasks as you.
All notifications	Option to delegate notifications. Select this option to send a copy of any notifications you receive to the delegate during the delegation period.

6. Click **Save**.

Result

Setting the delegation has the following effects during the specified period:

- The delegate can access and perform all the functions that you can do for your assigned legal requests, legal matters, matter tasks, and approvals from the **Delegated to me** list.
- Both you and the delegate receive notifications related to activities done on legal requests, legal matters, matter tasks, and approvals.

Delegate specific legal duties to another user using granular delegation

Delegate specific legal duties relating to your assigned legal requests, legal matters, legal matter tasks, and approvals to another user when you might not have time or are unavailable. These specific duties are derived from the pre-defined delegation rules.

Before you begin

- Granular Delegation plugin (com.glide.granular_service_delegation) must be activated.
- In the Legal Counsel Workspace settings, the **My Delegate** workspace list must be configured as follows:
  - The **My Delegate** workspace list on the Granular Delegate [sys_granular_delegate] table must be active.
  - The **My Delegate** workspace list on the Delegate [sys_user_delegate] table must be inactive.

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- For the new experience Legal Counsel Center Workspace, open *<instance>/sys_ux_list_list.do?sysparm_query=titleLIKEMy%20Delegates*.

  The **My Delegate** UX list must be configured as follows:

  - The **My Delegates** list on the Granular Delegate [sys_granular_delegate] table must be active.
  - The **My Delegates** list on the Delegate [sys_user_delegate] table must be inactive.
- Delegate rules must be created by the administrator. For more information, see Create delegation rules.

Role required: legal_fulfiller

About this task

You can use the granular delegation to delegate only specific requests such as Privacy Assessment requests. A delegation rule can be set on the Legal Request [sn_lg_ops_request] table with the condition as **[Category] [is] [Privacy]**.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Set Delegate**, click **My Delegates**.
4. In the My Delegates list, click **New**.
5. On the form, fill in the fields.

Granular Delegate form

Field	Description
Delegate	User to whom you are delegating legal duties assigned to you. **Note:** The delegate must be from the assignment group of which you are a member.
Starts	Start date of the delegation period.
Ends	End date of the delegation period.

6. Click **Save**.
   The delegation is created for the specified period. The **Delegation Rules** tab appears.
7. In the **Delegation Rules** tab, assign only specific legal duties and approvals defined in the delegate rules to the delegate.
   a. In the **Delegation Rules** tab, click **Add Duties**.
   b. In the Add Duties dialog, select the delegation rules you want to assign to the delegate.
   c. Click **Add**.

Result

Setting the granular delegation has the following effects during the specified period:

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- The delegate can access and work on your assigned legal requests, legal matters, legal matter tasks, and approvals as per the assigned duties from the **Delegated to me** list.
- Both you and the delegate receive notifications related to activities done on legal requests, legal matters, matter tasks, and approvals.

View and work on delegated legal duties

Delegate legal duties relating to your assigned legal requests, legal matters, legal matter tasks, and approvals to another user when you might not have time or are unavailable.

Before you begin
Role required: legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ().
3. In the **Delegate to me**, click a list item to see records assigned to the user who delegated you their duties.
   - Approvals: Opens a list of all delegated approvals for legal requests, legal matters, and legal matter tasks
   - Requests: Opens a list of all delegated legal requests
   - Matters: Opens a list of all delegated legal matters
   - Matter Tasks: Opens a list of all delegated legal matter tasks
4. Open a record from the list to view and work on it.

Using Legal Request Management

Employees can submit a legal request to seek services from the legal department and track its status.

Overview of using Legal Request Management

To submit and track legal requests refer to the following tasks.

Submit a legal request

Submit a legal request for yourself or on behalf of another user to seek services from the legal department.

Before you begin
Role required: sn_lg_ops.legal_user

About this task
You can also submit a legal request through your mobile device or the Virtual Agent chat.

- For more information on submitting a legal request through a mobile device, see Submit a legal request through Now Mobile.
- To submit a legal request through Virtual Agent chat, you must have the Legal Virtual Agent Conversations application installed on your instance. For more information, see Legal Virtual Agent Conversations.

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Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you are using Legal Service Portal, you can submit a legal request by navigating to the Legal Service Portal portal and selecting a request from the **Service Catalog**.

2. Select **Legal services** from the header.
3. Select **Browse Legal services**.
4. Filter and search in the categories for the legal service request.
5. Click a legal service item for which you want to submit a request.
   If you are not sure which legal service item to choose to submit your request, select **General Legal Request**.
6. On the form, fill in the fields.

   Note: Each legal service request form has a different set of fields based on the selected legal service item.

7. Click **Submit**.

Result

- A legal request is created in the New state.
- The request is assigned to a group or user in the legal department based on the assignment rule set in the associated practice area.
- The Standard Ticket page displays that has the following tabs to perform different tasks:
  - Activity: Track the activity history of the request and post messages for the fulfiller working on the request.
  - Attachments or Documents: Upload and manage the documents in the legal request.

    Note: If the external storage option is enabled, the **Documents** tab is displayed. Otherwise, the **Attachments** tab is displayed.

  - Request Details: Review request details.
- If the administrator has configured notifications, you receive notifications about the progress of the request.

View and track legal request details

View the details of a legal request after it has been submitted and track request activities.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **My Requests** from the header.

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3. Select the legal request from the list.
4. View the details of the legal request.
   - Review the request details by accessing the **Request details** tab.
   - Review the contract document.
     - If the request uses internal storage for attachments, access the **Preview** tab.
     - If the request uses external storage such as Microsoft OneDrive Google Drive, or the like, access the **Document revision** tab.
   - View a list of signatories and their details by accessing the **Signatories** tab.
   - View task SLA details by accessing the **Task SLAs** tab.
   - View the access levels to documents for various personas by accessing the **Document Access** tab.
5. **Optional:** Track the request's activities and post messages for the fulfiller working on it by accessing the **Activity** tab.

Update a submitted legal request

Update request details, add comments, or upload documents in a legal request you submitted while it is still in the New or Assigned state. You can cancel a submitted request irrespective of its state.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **My Requests** from the header.
3. Select the legal request from the list.
4. On the Standard Ticket page, review and edit the request details, manage attachments, or cancel the request.

Action	Steps
Modify the request de tails	**Note:** This option is available only if the request is in the New state. **a.** From the Actions menu, select **Edit Request**. **b.** In the Variables form, modify the request details. **c.** Click **Save**. **d.** Click **Back** to return to the Standard Ticket page. The legal request is updated with the new information. The changes appear as comments in the Additional Comments sec tion of the request.

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Action	Steps
Cancel the request	**a.** From the Actions menu, select **Cancel Request**. **b.** In the Confirm request cancellation dialog box, provide the rea son for the cancellation in the **Comments** field and click **Con firm Cancellation**. The request is canceled and the cancellation comments appear in the Additional Comments section of the request. Any associated active flows are terminated. Any pending ap proval record is also canceled and a comment is posted in the Additional Comments section of the approval record.

5. **Optional:** In the **Activity** tab, provide comments or more information about your request for the request fulfiller.
6. **Optional:** Manage documents supporting your request.

Option	Steps
If the Attachments tab is visible	○ To upload a new document, select the add attachment icon (📎) and select a file. ○ To rename an attached file, select the ed it file name icon (✎) and update the file name. ○ To remove an attached file, select the delete icon (✖).
If the Documents tab is visible	○ To upload a new document, select **Attach** and select a file. A link to the document is listed in the **Exter nal URL** column of the documents list. ○ To remove an attached file, select **Delete**. In the Delete document dialog box, select a document from the list, and then select **Delete**.

7. **Optional:** In the **Approvals** tab, view the approval details associated with the legal request.

   Note: The **Approvals** tab appears only when the legal request or its attachment has approval records.

8. **Optional:** In the **Legal Matters** tab, view any legal matter associated with the legal request.

   Note: The **Legal Matters** tab appears only when the legal request is associated with a legal matter, and you have permission to view legal matters.

Reopen a closed legal request

Reopen a request if you're not satisfied with the resolution given by the legal team.

Before you begin

Role required: sn_lg_ops.legal_user

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About this task

As a requester, you can only reopen your requests that have been closed (Close Complete or Closed Incomplete). You cannot reopen a request that has been canceled.

Note: The option to reopen is not available for approval-based workflow legal requests, such as stock preclearance approval, conflict of interest disclosure, and non-disclosure agreement with third parties.

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **My Requests** from the header.
3. Select the legal request from the list.
4. On the Standard Ticket page, click **Reopen Request** to open the request.
5. In the dialog box, enter comments to explain why you are reopening the request in the **Reason** field.
6. Click **Reopen Request**.

Result

The request is reopened, and its state changes to Work in Progress. The request is reassigned to the same legal team member to whom it was previously assigned.
If the administrator has configured email notifications, the assigned user, practice area lead, assignment group manager, and any collaborators added to the request will receive notifications about the reopening of the request by the requester. If the legal request assignment group permissions is not No Access then all assignment group members also notified.

Managing legal requests

As a member of the legal department, you work on legal requests submitted by employees to resolve their issues or to answer their queries.

When an employee submits a legal request, it is automatically assigned to a group or user in the legal department. The assignment is done based on assignment rules configured in the intake form of the associated practice area. If the request is assigned to a legal group, the group lead can triage the request to themselves or to any member in the assignment group.

Fulfillers can also mark requests as privileged and confidential. When privileged and confidential is enabled, the system restricts access to authorized stakeholders, and marks communications with confidentiality banners. For more information, see Attorney-Client Privilege.

When a requester creates a legal request under the incorrect Practice Area and Category, the legal fulfiller can transfer the request to the correct Practice Area and Category. The transferred request contains all the relevant details copied from the old request, including the attachments. The fulfiller can submit the request or send the request back to the requester to complete.

Note: The external storage options that support attachments in a transferred request are Microsoft OneDrive and Google Drive.

Use the Legal Counsel Center to work on legal requests assigned to you.

Assign a legal request

Assign a legal request to yourself or to someone in your assignment group.

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Before you begin
Role required: sn_lg_ops.legal_fulfiller

About this task
When an employee submits a legal request, it is automatically assigned to a group or user in the legal department. The assignment is done based on the assignment rules configured for the intake form of the associated practice area. If the request is assigned to a legal group, any member from the group can triage the request themselves or assign it to another member of the group.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Legal Requests**, click **Unassigned**.
4. In the list of unassigned requests, open a request by clicking the request number.
5. **Optional:** Update the **Assignment group permission** to change the permission level of the legal request for the users.
   - **No Access**: Only the practice area lead, group manager, and user in the **Assigned to** field can access the legal request and assign it to one of the members in the assignment group. The assigned user can then work on the legal request.
   - **Read**: All members from the assignment group can only view the legal request. This option is the default permission level.
   - **Edit**: All members from the assignment group can view and work on the legal request. The Assigned To field becomes optional if this option is set.

   Assignment Group Permission field of a active Legal Request Record can be edited by:
   - Practice area lead, Assignment group manager, Assigned to, and delegated users.
   - Any Assignment group member, if the record is in New state or Assignment group permission is edit or Configured options have assigned_to_field_not_mandatory in it.
6. Based on the permission option, assign the request to yourself or to another member from the assigned group.
   - To assign the request to yourself, click **Assign to me**.
   - To assign the request to another member, on the **Details** tab, select a user in the **Assigned to** field and click **Save**.

Result
The state of the request updates to Assigned.

What to do next
The assigned user can start working on the legal request.

Work on a legal request

Work on legal requests assigned to you or as a collaborator to resolve issues or answer queries.

Before you begin
Role required: sn_lg_ops.legal_fulfiller

About this task
As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

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Note: During times when you're unavailable, you can delegate your legal duties to other users.

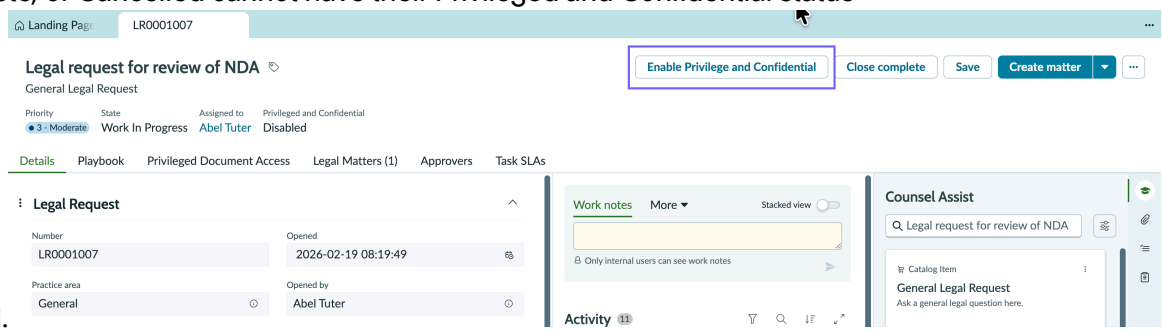
Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. **Optional:** Enable privilege and confidential status.

   a. Select **Enable Privilege and Confidential**.
   The enable action is available only when the request is in the Assigned or Work in progress state. Requests in states such as Closed Complete, Closed Incomplete, or Cancelled cannot have their Privileged and Confidential status changed.



   b. On the confirmation modal, select **Continue**.

- The legal request is marked as Privileged and Confidential.
- The assignment group permission is automatically updated to No Access. You can manually modify the assignment group permission.
- Privileged and Confidential field in the secondary header is changed to Enabled.
- In the Privileged Document Access tab, the document permissions are marked as Privileged & confidential. Access to these documents for users is controlled by the Assignment group permissions.

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- Notifications and outbound emails from the request automatically include "privileged and confidential" markers in the email content.
- Stakeholders are notified when changes occur to the collaborator list, watchlist, or fulfiller assignment of a privileged and confidential enabled request.

5. **Optional:** Update the **Assignment group permission** to change the permission level of the legal request for the users.
   - **No Access**: Only the practice area lead, group manager, and user in the **Assigned to** field can access the legal request and assign it to one of the members in the assignment group. The assigned user can then work on the legal request.
   - **Read**: All members from the assignment group can only view the legal request. This option is the default permission level.
   - **Edit**: All members from the assignment group can view and work on the legal request. The Assigned To field becomes optional if this option is set.

   Assignment Group Permission field of a active Legal Request Record can be edited by:
   - Practice area lead, Assignment group manager, Assigned to, and delegated users.
   - Any Assignment group member, if the record is in New state or Assignment group permission is edit or Configured options have assigned_to_field_not_mandatory in it.
6. **Optional:** If the request must be reassigned to a new assignment group due to business needs, select a new assignment group in the **Assignment group** field.

   Note: Editing of the **Assignment group** field is available only when the **Editable Assignment group in Request** option is configured in the associated intake form.

   When the assignment group is changed, existing group users who are not in the updated assignment group might lose access to the request. The **Assigned to** field is also cleared, and the assigned user is notified via email.
7. **Optional:** If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

   Note: Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal request.
8. Work on the legal request to fulfill the requested services or information.
   If the request needs detailed investigation, you can promote the request to a legal matter.

   Note: To promote a legal request to a legal matter, you must have the Legal Matter Management app installed and the record producer type for the associated intake form must be set to **Request and Matter**. For more information on setting a record producer type, see Add an intake form to a practice area.
9. Manage documents that are part of the resolution to the legal request.
10. **Optional:** Initiate an ad hoc approval for the legal request or its attachments when an approval is required from other stakeholders.
11. **Optional:** Communicate with the requester or other stakeholders using emails, chats, work notes, or comments.

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- Using emails: Communicate with any stakeholders using emails. For more information, see Communicate using emails.
- Using live chats: Communicate with any stakeholders using chats. For more information, see Start a chat session through Legal Counsel Center Inbox.
- Using Comments: To communicate with the requester or other stakeholders, in the Compose section, enter your message in the **Comments** field and click **Post Comments**.
- Using Work notes: Communicate with the other members of the legal department, in the Compose section, enter your message in the **Work notes** field and click **Post Work notes**.

  Using response templates, you can insert predefined content into emails, chats, and legal request and legal matter form fields such as **Comments** and **Work notes**. Select the response template icon () and find an appropriate response template based on the subject of your email. Copy and paste the template's content into the required field.

  Note: Response templates configured for legal services are only available to use.

Legal requests marked as Privileged and Confidential, contain confidentiality markers to comply with legal requirements. This applies to both system-generated notifications and fulfiller-initiated outbound emails.

12. Either close the request or cancel it.
    - After you resolve the request, you can close the request.
    - If you identify that the request doesn't need any action, you can cancel it.

Manage attachments for a legal request

Upload supporting documentation, such as documents, email copies, images, or any other files into a legal request while you are working on it.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

About this task

You can also use these artifacts as a reference material to solve similar requests in future.

If the external storage option is enabled, you can manage document access for users to see these attachments. For more information, see Document access in a legal request.

If the Privileged and Confidential status is enabled on a legal request, you can change the permission of attached documents from the Privileged Document Access tab.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ().
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on.

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Option	Steps
	c. If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. **Optional:** Manage documents in the legal request.

Option	Steps
Using the at tachment icon	(Optional) The attachment icon appears in the Counsel Assist side bar when the external storage option is not enabled. **a.** In the Counsel Assist sidebar, select the attachment icon. **b.** In the **Attachments** pane, add, rename, or remove attachments. ▪ To upload a document, select the **Browse** button or the add attach ment icon (+) and select a file. **Note:** The **Browse** button is available when the legal request has no attachments else the add attachment icon + is available. ▪ To rename an attached file, select the actions icon (⋮), select **Rename** and update the file name. ▪ To delete an attached file, select the actions icon, select **Remove**. ▪ To download an attached file, select the actions icon, select **Download**.
Using the Docu ments tab	(Optional) The **Documents** tab appears when the external storage option is enabled. ○ Upload a new document. **a.** In the **Documents** tab, select **Attach** and select a file. **b.** On the New Document form, select **Attach file** link and select a file. **c.** Select **Save**. In the **Documents** tab, a link to the document is listed in the **External URL** column of the documents list. ○ Remove an attached file. **a.** In the **Documents** tab, select a document from the list that you want to delete. **b.** Select **Delete**. Access to these documents to various users is controlled in multiple ways. For more information on managing document access, see Docu ment access in a legal request.

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Option	Steps
Using Privileged Document Access tab	(Optional) The Privileged Document Access tab appears when Privileged and confidential status is enabled. The document permission is marked as Privileged & confidential when the request status is set as privileged and confidential, and resets to Public when the status is removed. Access to these documents for users is controlled by the Assignment group permissions. Change permissions for documents. **a.** In the **Privileged Document Access** tab, select the check box next to the document for which you want to change the permission. **b.** Select **Manage Access**. **c.** Select the option applicable. ▪ Privileged and Confidential – Protects documents under legal privilege and confidentiality. Use this option for sensitive communications between an attorney and client. ▪ Legal Work Product Protected – Restricts access to internal legal analysis, drafts, or investigation notes prepared in anticipation of litigation. ▪ Public – Marks documents as freely shareable externally without restrictions. **d.** Select **Update**.

Document access in a legal request

Documents attached to legal requests are uploaded to the configured external storage system when the external storage option is enabled on the legal request intake form. The access of these documents to various personas is controlled in real time, via a scheduled job, or on-demand.

Document access for various personas

The following table shows the type of access to documents and when it is granted to various personas.

Document access in a legal request

Persona	Access type	When
Requester, requested for	Read, Write, Delete—on their own documents Read only—on documents attached by the legal request fulfiller	Request is submitted
Group manager	Read, Write, Delete	Request is submitted
Legal request fulfiller (Assigned to)	Read, Write, Delete	Request is assigned
Collaborators	Read, Write, Delete	Added to the **Collaborators** list

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Document access in a legal request (continued)

Persona	Access type	When
Ad hoc approvers	Read only, No delete	Ad hoc approval is initiated
Practice area lead	Read only, No delete	Scheduled job is run or on-demand
Members of assignment group	Depends on the **Assignment group permission** field	Scheduled job is run or on-demand
Watch list users	Read only, No delete	Added to the **Watch list**
Delegates	Read, Write, Delete	*`Resolve platform delegation permissions for legal request`* job is run as scheduled, or on-demand
Delegates through granular delegation	Read only, No delete	User is delegated

The scheduled job *`Process External Storage Permissions`* runs at the defined intervals to sync access for all unprocessed permissions on documents for legal requests stored in external storage.

- Requesters can access documents attached to their legal requests from the **Documents** tab on the Standard Ticket page.

  Note: Requesters can delete only those documents from the request that they've attached.

- The legal fulfiller assigned to the legal request can access documents from the **Documents** tab of the request record in the Legal Counsel Center.
- Users added to the matter can request on-demand access to documents if they need access before the scheduled job is run.
- The legal fulfiller can revoke a user's access to documents.
- Ad hoc approvers lose document access after they approve or reject the requested item.
- Delegates lose access after the delegation period expires.

Request document access for a legal request

Request access to documents attached to a legal request that you do not currently have access to.

Before you begin

Role required: sn_lg_ops.legal_user or sn_lg_ops.legal_fulfiller

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About this task

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **Legal Requests**, click **All**.
4. Open a legal request you want to request access to see the documents attached to it.
5. In the **Documents** tab, click **Request Access**.

Result
The system processes the user's permissions and grants access to the documents in the legal request.

Remove document access of users in a legal request

Remove existing users' access to documents attached to a legal request when they are no longer required to view those documents.

Before you begin
Role required: sn_lg_ops.request_admin

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **Legal Requests**, click **All**.
4. Open a legal request you want to remove users' access to documents attached to it.
5. In the **Documents Access** tab, select users for whom you want to remove the document access.

   Note: The **Document Access** tab is only visible to the practice area lead, the manager of the current assignment group, and the assigned to person.

6. Click **Remove Access**.

Result
The document access of the selected users is removed, and they're also removed from the list. The user will no longer be able to view the request's documents.

Initiate an ad hoc approval for a legal request or its attachment

Initiate an ad hoc approval for a legal request or its attachments from a user or a user group.

Before you begin
Role required: sn_lg_ops.legal_fulfiller

About this task
As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Some cases where approvals can be requested for a legal request or its attachment include:

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- Approval for legal contract documents from stakeholders.
- Ad hoc approval for a legal request that needs an authorization from the privacy team before it can be processed.

You can assign these approvals to any user or user group in your organization who have the legal_user role. When you initiate an approval, the approvers receive an email notification and can review and act on the approval.

Note: If a legal request or attachment already has a pending approval record, you cannot initiate another approval for the same item.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. In the **Approvers** tab, click **Initiate Approval**.

   You can also initiate an approval by clicking the more actions button ( ) and selecting **Initiate Approval**.
5. On the Initiate Approval dialog box, fill in the fields.

Initiate Approval dialog box

Field	Description
Approval for	Item that needs an approval. ○ **Request**: Get approval for the entire legal request. ○ **Attachment**: Get approval for an attachment in the legal request.
Select attachment	Attachment in the legal request for which approval is required. This field appears only when **Attachment** is selected from **Approval for**.

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Field	Description
Select document	Documents attached to the legal request for which approval is required. This field appears only when **Document** is selected from **Approval for**. **Note:** The Document option in the list appears only when the external storage option is enabled on the intake form of the request type.
Approval by	Approval required at user level or user group level. ○ **User**: Get approval from an individual user. ○ **User group**: Get approval from a set of users. The **Select user** field is replaced by the **Select user group** field.
Select user	User or user group who must approve the item. **Note:** Users or user groups with the legal_user role are listed. ○ If you selected **User** in the **Approval by** field, select a user from whom the approval is required. ○ If you selected **User group** in the **Approval by** field, select a user group from whom the approval is required.
Approval note	Note for the selected user or user group.

6. Click **Initiate**.

Result

Assigned approvers are added in the **Approvers** tab based on the following conditions:

- If you selected **User** in the **Approval by** field, an approval record is created for the selected user.
- If you selected **User group** in the **Approval by** field, an approval record for each user in the selected user group is created. Anyone from the group can approve.

The assigned approvers get an email notification with a link to open the record for review and action.

Note:

- An attachment cannot be deleted after an ad hoc approval is initiated and is in the Requested state. To remove such attachments, either cancel the ad hoc approval request or obtain the approval first.
- When you remove an attachment from a legal request, it also deletes the associated ad hoc approval records. A work note is posted with the deletion details in the activity stream of the legal request.

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The approval details appear under the **Approvals** tab on the Standard Ticket page.

What to do next
Approvers can review and approve or reject the requested item.

Cancel an ad hoc approval for a legal request

Cancel an ad hoc approval for a legal request if it no longer requires any action.

Before you begin
You can only cancel an ad hoc approval that is in the Requested state.

Role required: sn_lg_ops.legal_fulfiller

About this task
As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. In the **Approvers** tab, click **Cancel Approval**.
5. In the Cancel Approval dialog box, select the approval record from the **Approval for** field that you want to cancel.
6. Enter comments for canceling the approval record and click **Confirm Cancellation**.

Result
The approval record is canceled and its state updates to Cancelled and comments are added to the approval record. If the approval was requested from a user group, then the corresponding approval records for all users in the user group are canceled.

Approve or reject a legal request or its attachment

Review a legal request or attachment and approve or reject it.

Before you begin
You must have received an email notification with a link to the legal item for approval.
Role required: approver_user and legal_user

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Procedure

1. Open the approval record from the email notification, Legal Counsel Center, Self-Service, or Employee Center portal.

Options	Steps
From the email notification	Click the link in the email to open the record that needs approval.
From Legal Counsel Center	**Note:** The request_fulfiller role is required to access Legal Counsel Center. **a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** In the **Lists** tab, under **My Work**, click **Items Pending Approval**. **d.** In the Items Pending Approval list, click a record to open for approval.
From Self-Service	**a.** Navigate to **All** > **Self-Service** > **My Approvals**. **b.** In the My Approvals list, click a record to open for approval.
From Employee Center	**a.** In the Employee Center portal, on the menu bar, click the **My Tasks**. **b.** In the My To-dos list, click a record under the **Open** tab to open for approval.

2. Review the record and either approve or reject:
   - To approve the record, click **Approve**.
   - To reject the record, enter comments for rejection in the **Comments** field and click **Reject**.

Result

The following table shows the result of approve and reject actions on the approval record.

Result of approving or rejecting a legal item

Approve	Reject
• The approval record's state updates from Requested to Approved. If the requested item was assigned to a user group for approval, then the state of the approval records for the remaining users updates from Requested to No Longer Required.	• The approval record's state updates from Requested to Rejected. If the requested item was assigned to a user group for approval, then the state of the approval records for the remaining users updates from Requested to No Longer Required.

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Result of approving or rejecting a legal item (continued)

Approve	Reject
Note: If the approval was for an attachment of a legal request, the attachment cannot be deleted from the legal request. • Any approver who isn't added to **Watch list** in the legal request would lose access to the approved item.	• The rejection comments posted by the approver is added to the legal request's Activities section. • Any approver who isn't added to **Watch list** in the legal request would lose access to the approved item.

- Any approver who isn't added to **Watch list** in the legal request would lose access to the approved item.
- Request fulfiller and collaborators get an email notification about the approval or rejection.

Communicate using emails from Legal Counsel Center

Compose and send emails directly from legal request record form in the Legal Counsel Center. You can also save the email as draft to send it later.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **Legal Requests**, click **Assigned to Me**.
4. Open a legal request.
5. Click the more actions button ( ) and select **Compose Email**.
   The **Compose Email** button is available only when the legal request is in the Assigned or Work in progress state.
6. In the **New Email Draft** tab, compose a new email or respond to the email received.

   Using response templates, you can insert predefined content into the email body. Select the response template icon ( ) and find an appropriate response template based on the subject of your email. Copy and paste the template's content into the email body.

   Note: Only response templates configured for the email channel are available to use. For more information, see Response templates configured for email channel.

   For more information, see Communicating via email.
7. Send it right away or save it as a draft to send later.

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- To send the email instantly, click **Send Email**.
- To save the email as draft, click **Save as draft**.

Note: You can view the draft emails by clicking the list icon ( ), selecting the **Drafts** list item under the **Email** category, and opening a draft email.

Result

After the email is sent, it is added to the activity stream on the legal request form. Emails you receive from others are also added to the activity stream.
Legal requests marked as Privileged and Confidential, contain confidentiality markers to comply with legal requirements. This applies to both system-generated notifications and fulfiller-initiated outbound emails.

Promote a legal request to a legal matter

Promote a legal request to a legal matter when the request needs additional investigation and cross-departmental collaboration that might take more time to resolve.

Before you begin

Ensure you have the Legal Matter Management app installed and the record producer type in the associated intake form set to **Request and Matter**. For more information, see Add an intake form to a practice area.

Role required: sn_lg_ops.legal_fulfiller

About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. Promote a legal request to a legal matter by creating a new matter or adding it to an existing matter.

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Option	Steps
Create a new matter	○ Select **Create Matter**. ○ In the Create Matter dialog, indicate whether to use a template to create a legal matter. ▪ To create a legal matter record with prede fined data, such as phases and tasks, se lect a template name from the Matter tem plate list, and select **OK**. ▪ To create a legal matter record without any predefined data, leave the Matter template field empty and select **OK**.
Add to an existing matter	○ Select **Add to an Existing Matter**. ○ In the Add to an existing matter dialog, se lect an existing matter. ○ Select **OK**

Result

- A legal matter is created with details copied from the legal request.
- When legal request is promoted by creating a new matter, the Privileged and Confidential status of the created matter is dependent on the Privileged and Confidential status of the request. You can change the status later.
- When legal request is promoted by adding to an existing matter, the Privileged and Confidential status of the existing matter is retained irrespective of the Privileged and Confidential status of the request.
- You (a legal fulfiller or a collaborator) will be added in the **Watch list** of the legal matter to access it.
- If you selected a matter template, then the matter has predefined phases, tasks, and attributes from the template.
- If the external storage option is enabled, the documents attached to the legal request and stored in the configured external storage are listed under the **Documents** tab of the legal matter's Artifact record.

> **Note:** Since the documents in the artifact created from the requests are shared, the addition or deletion of any documents in this shared artifact is reflected in both request and matter. Also, the document permission for this shared artifact is managed at the legal request level and not at the legal matter level.

Transfer a legal request

Transfer a legal request to a new practice area or category if the request was submitted with an inappropriate practice area or category.

Before you begin

Ensure that the record producer is mapped to category. For more information, see Add an intake form to a practice area.

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The transfer request action is available to the users having write access to the request, such as Practice Area Leads, Group Managers, and users with Request manager roles in New state. It is also available to the respective fulfillers to whom the request is assigned in the Assigned state.

Role required: sn_lg_ops.request_fulfiller

About this task

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Select **Assigned to Me** under **Legal Requests**.

   Note: Practice Area Leads and Group Managers can transfer a legal request without assigning the request to anyone.

4. Open the legal request that you want to transfer.
5. Select the More Actions icon ( ) and then select **Transfer Request**.
6. In the dialog box, fill in the fields.

Transfer Request dialog box

Field	Description
Practice area	Practice area to which you want to transfer the request.
Category	Category associated to the practice area. **Note:** If you select the Third party contract as the category, you need to use **Send to Requester** action instead of **Submit** after transferring the request.
Subcategory	Subcategory associated with the category.
Additional comments	Any comments that would be helpful in relation to the transfer of the legal request.

7. Select **Transfer**.
   The information in the Variables section must be complete.
   - If you have the variable information, update the Variables details and select **Submit**.

     An email notification is sent to the requester, fulfiller, and anyone on the Watch list.

     Note: If the legal request is transferred to **Contracts**, the **Submit** button is not available.

   - If you do not have the complete variable information, select **Send to Requester** to send the request back to the requester.

     An email notification is sent to the requester, and requested for. For more information, see Update a legal request by requester.

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Result

- The legal request is transferred to the selected practice area.
- When a request is transferred, the newly created request does not inherit the Privileged and Confidential setting from the parent legal request.
- A new request is created and the old request is canceled.
- The state of the new request is Draft.
- The fulfiller becomes the collaborator. Collaborators are assignees who have similar privileges as the person to whom the legal request is assigned.
- Any attachments in ServiceNow® storage or external storage like Google Drive and Microsoft OneDrive are transferred to the new request.
- After the request is sent to the requester, the fulfiller's name is moved from the Collaborators field to the Watch list.
- The request state is changed to New after the variables are updated and submitted by the fulfiller.

Update a legal request by requester

Update the variables in the form fields and submit the legal request by the requester once the request is sent back by the fulfiller.

Before you begin

Ensure that Employee Center portal is installed.

Role required: sn_lg_ops.legal_user

About this task

After the legal request is transferred and the fulfiller sends the request back to the requester, an email notification is sent to the requester. For more information on the transfer of a legal request, see Transfer a legal request.

Note: If the legal request is created by a different user on behalf of the requester, both users receive the email notification and both can update the request.

Procedure

1. Select the **Review and submit** link in the email.
2. On the My Tasks page in Employee Center, select the required request task.
3. The requested task opens in Employee Center.
4. Fill in the fields in the **Details** tab.
   The fields in the Details tab vary depending on the Practice area or Category of the request.
5. Select **Submit**.

Result

The legal request is updated with the new variable information.

A success confirmation message is displayed.

Disable attorney client privilege for a legal request

Disable attorney client privilege for a legal request.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

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About this task

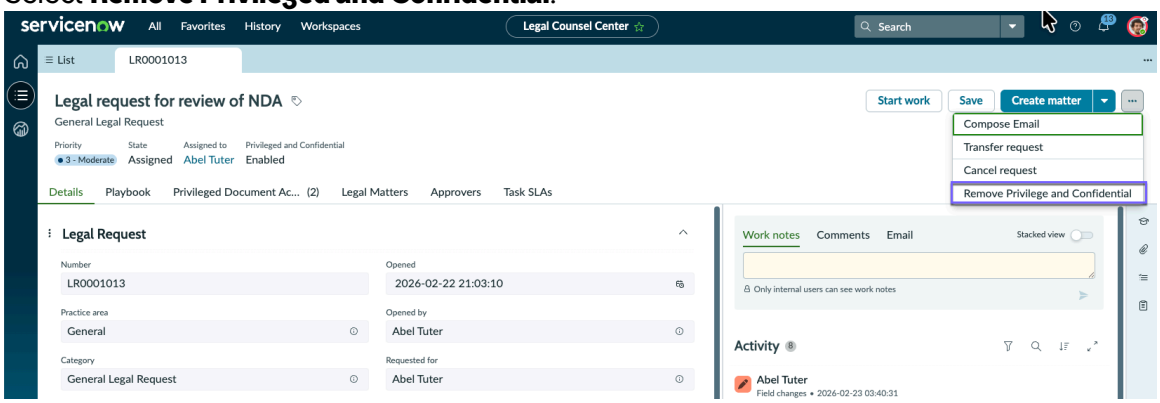
As a fulfiller, you can disable Privilege and Confidential status for a legal request to remove privileged and confidential status. The remove action is available only when the request is in the Assigned or Work in progress state. You can not change the Privileged and Confidential status of requests in Closed Complete, Closed Incomplete, or Cancelled states.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. Disable Privileged and Confidential status.
   a. Click the More actions icon ( ).
   b. Select **Remove Privileged and Confidential**.



   c. In the confirmation modal enter work notes and select **Disable**.

Result

- The Privileged and Confidential status is removed.
- The assignment group permission is retained as it was before removing the privileged and confidential status.
- Privileged and Confidential field in the secondary header is changed to Disabled.

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- In the Privileged Document Access tab, the document permissions is marked as Public.
- Stakeholders are notified of the change.

Close a legal request

You can close a legal request assigned to you when you've resolved it.

Before you begin

If you've installed Legal Matter Management and have a legal request promoted to a legal matter, the system closes legal requests automatically when the matter owner chooses to close the related requests while closing the matter.

Note: A legal request cannot be closed if there are any open ad hoc approval records for it or its attachments.

Role required: sn_lg_ops.legal_fulfiller

About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. **Optional:** Attach files that are a solution for the request or a link to the knowledge base article as reference material for the requester.
5. Close the request based on the work done on the request:
   - If your work on the request resolved the request, click **Close Complete**.
   - If you have done some work on the request but were unable to resolve the request, click **Close Incomplete**.
6. In the dialog box, enter comments to explain why the request was closed in the **Additional comments** field.
7. Click **OK**.

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Result
The legal request is closed based on the system property *sn_lg_ops.allow_request_closure_with_open_matters* and whether or not there is a legal matter associated with the request.

- If the property is set to false and there is an open associated legal matter, the request is closed only after the legal matter is closed.
- If the property is set to true, the request is closed regardless of the state of the associated legal matters.

The state of the request changes to Closed Complete or Closed Incomplete, depending on the option selected.

Legal Request Management reference

Reference topics provide additional information about the lists and forms that you use in Legal Request Management.

Legal Service Delivery properties

There are several properties that you can use to configure integrations for Legal Service Delivery apps.

These properties are available for Legal Service Delivery.

Note: To configure these properties, navigate to **All** > **Legal Administration** > **Legal Integrations** > **Properties**.

Properties for Legal Service Delivery

Property	Description
External Storage section	
Maximum number of attempts before removing the permission records with errors sn_lg_ops.external_storage_clear_errored_records_after	The number of retries permitted before removing all errored permission entries from the job execution queue. • Type: integer • Default value: 5 • Learn more: Configure an external storage system for legal requests and legal matters
Time in minutes to retry permission records execution sn_lg_ops.integration_retry_after	The amount of time the system waits in minutes before retrying to execute permission records. • Type: integer • Default value: 20 • Learn more: Configure an external storage system for legal requests and legal matters

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Properties for Legal Service Delivery (continued)

Property	Description
Maximum number of permission records to include in a job execution sn_lg_ops.integration_external_storage_job_batch_limit	The number of permission records that can be included in single job execution. • Type: integer • Default value: 30 • Learn more: Configure an external storage system for legal requests and legal matters
Maximum number of failed calls before marking the flow status as errored sn_lg_ops.integration_retry_record_threshold	The maximum number of failed job execution calls permitted before the flow status is marked as errored. • Type: integer • Default value: 5 • Learn more: Configure an external storage system for legal requests and legal matters
Legal Integration Core section	
IntegrationCore script schema override sn_lg_ops.integration_schema_overrides	Your custom schema structure, which takes precedence over the schema in the IntegrationCore script. You can use an existing schema structure from the IntegrationCore script as a starting point for creating your schema structure. • Type: string • Default value: {}

The property is available for Legal Request Management.

Note: To configure the property, navigate to **All** > **Legal Administration** > **Legal Request Management** > **Properties**.

Properties for Legal Request Management

Property	Description
sn_lg_ops.allow_request_closure_with_open_matters	The property allows the closure of a legal request even if it has open matters associated.

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Properties for Legal Request Management (continued)

Property	Description
	• Type: boolean • Default value: false

Components installed with Legal Request Management

Several types of components are installed with activation of the Legal Request Management application, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles

Note: Some roles in the **Contains roles** column are available with installation of the respective Legal Service Delivery application. For example, roles with an sn_lg_matter prefix are added when you install the Legal Matter Management application.

Roles installed with Legal Request Management

Role title [name]	Description	Contains roles
Legal Administrator [sn_lg_ops.legal_admin]	Provides administrative access to all legal apps and the underlying data.	• sn_lg_coi.coi_admin • sn_lg_contracts.contracts_admin • sn_lg_forensics.forensics_admin • sn_lg_investigate.admin • sn_lg_ops.request_admin • sn_lg_pa.pa_admin • sn_lg_matter.matter_admin • sn_lg_stock_cp.stock_config • sn_lg_cf_workspace.admin • sn_lg_awa.admin • sn_lg_pi.admin
Legal Assignment Rules Administrator [sn_lg_ops.legal_assignment_rules_admin]	Provides administrative access to the Assignment Rules module in legal apps.	• assignment_rule_admin • sn_lg_ops.legal_user

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Roles installed with Legal Request Management (continued)

Role title [name]	Description	Contains roles
Legal Catalog Administrator [sn_lg_ops.legal_catalog_admin]	Provides administrative access to the Catalog administration module in legal apps.	• catalog_admin • catalog_editor • sn_lg_ops.legal_user
Legal Configurator [sn_lg_ops.legal_config]	Provides access to configure data such as practice area, category, and legal matter templates. It doesn't provide access to the transactional data of legal requests and matters.	• sn_lg_contracts.contracts_config • sn_lg_forensics.forensics_config • sn_lg_investigate.config • sn_lg_ops.request_config • sn_lg_matter.matter_config
Legal Event Administrator [sn_lg_ops.legal_event_manager]	Provides read-only access to the Events module in legal apps.	sn_lg_ops.legal_user
Legal Fulfiller [sn_lg_ops.legal_fulfiller]	Provides fulfiller access for working on assigned legal requests and matters.	• awa_agent • sn_lg_contracts.contracts_fulfiller • sn_lg_forensics.forensics_fulfiller • sn_lg_investigate.fulfiller • sn_lg_ops.request_fulfiller • sn_lg_matter.matter_fulfiller
Legal Manager [sn_lg_ops.legal_manager]	Provides access to all transactional data of legal requests and matters and permission to assign owners for requests and matters.	• sn_lg_coi.coi_fulfiller • sn_lg_ops.legal_event_manager • sn_lg_ops.request_manager • sn_lg_matter.matter_manager
Legal Notification Administrator [sn_lg_ops.legal_notification_admin]	Provides administrative access to the Notifications module in legal apps to configure email notifications. **Important:** To add or modify notifications, you need the admin role.	• sn_lg_ops.legal_user • usage_admin
Legal Report Publisher [sn_lg_ops.legal_report_publisher]	Provides restricted access to legal request and legal matter data for publishing the related reports.	• report_publisher • sn_lg_ops.legal_report_viewer • sn_lg_ops.legal_user

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Roles installed with Legal Request Management (continued)

Role title [name]	Description	Contains roles
		• pa_power_user • pa_data_collector
Legal Report Viewer [sn_lg_ops.legal_report_viewer]	Provides restricted access to users to view reports for legal requests and matters on the Legal Operations and Legal Executive dashboards.	• report_user • sn_lg_ops.legal_user • pa_viewer
Legal Request Fulfiller [sn_lg_ops.request_fulfiller]	Provides fulfiller access for working on assigned requests.	• approver_user • canvas_user • task_editor • sn_templated_snip.template_snippet_reader • sn_lg_ops.legal_report_viewer • workspace_user • sn_uxc_gen_ai.platform_ai_field_predictor • email_composer • sn_lg_ops.legal_user • email_composer • sn_uxc_gen_ai.platform_ai_record_mgmt • knowledge • sn_lg_ops.legal_sla_read • awa_agent • sn_lg_cf_workspace.legal_workspace_user **Important:** sn_lg_cf_workspace.legal_workspace_user inherits workspace_user that provides access to the Next Experience Workspace.
Legal SLA Read [sn_lg_ops.legal_sla_read]	Provides access to view SLAs created on requests.	sn_lg_ops.legal_user
Legal User [sn_lg_ops.legal_user]	Provides access to submit legal requests and track their progress. Can work on assigned tasks related to matters.	sn_interview_temp.reader

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Roles installed with Legal Request Management (continued)

Role title [name]	Description	Contains roles
Request Administrator [sn_lg_ops.request_admin]	Provides administrative access to the Legal Request module with full access to data.	• sn_lg_ops.legal_catalog_admin • sn_lg_ops.request_config • sn_lg_ops.request_manager
Request Configurator [sn_lg_ops.request_config]	Provides access to configure data such as a practice area and category, and manage record producers through Catalog Builder. It does not provide access to the transactional data of legal requests.	• catalog_builder_editor • catalog_editor • connection_admin • email_client_quick_message_author • sla_manager • sn_lg_ops.legal_assignment_rules_admin • sn_lg_ops.legal_notification_admin • sn_lg_ops.legal_user • sn_lg_stock_cp.stock_config • sn_templated_snip.template_snippet_writer
Request Manager [sn_lg_ops.request_manager]	Provides access to all transactional data of legal requests and permission to assign requests.	sn_lg_ops.request_fulfiller

Scheduled jobs

Note: The following scheduled jobs are applicable when the **Enable External Storage for attachment** option is added to an intake form. For more information, see Add an intake form to a practice area.

Scheduled jobs installed with Legal Request Management

Scheduled job	Description
Process External Storage Permissions	The job selects and executes all scheduled permission records on documents for legal requests stored in external storage.
Retry External Document Failure	The job is executed on demand by the administrator to retry failed document uploads to external storage.

Tables

Note: In addition to the following tables, tables specific to practice areas are installed with Legal Request Management. For more information, see Practice area tables for legal requests.

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Tables installed with Legal Request Management

Table	Description
Catalog Defaults [sn_lg_ops_catalog_default]	Stores service catalog defaults such as any declarations content or templates for specific legal request. Extends the Application File [sys_metadata] table.
Category [sn_lg_ops_category]	Stores intake forms of a practice area. These intake forms categorize legal requests into relevant groups. Extends the Application File [sys_metadata] table.
CRM [sn_lg_ops_integration_crm]	Stores configuration details for Customer Relationship Management (CRM) apps such as Microsoft Dynamics CRM. Extends the Legal Integration table.
Document (sn_lg_ops_external_document)	Stores the details of the documents for legal requests stored in an external storage. This table is applicable when the **Enable External Storage for attachment** option is added to an intake form. For more information, see Add an intake form to a practice area.
Electronic Signature [sn_lg_ops_integration_esignature]	Stores configuration details for external electronic signature such as Adobe Acrobat Sign or Docusign. This table extends the Legal Integration table.
External Apps Configuration (Deprecated) [sn_lg_ops_external_configuration]	The table has been deprecated. Use the Legal Integration, Electronic Signature, and External Storage tables instead.
External Storage [sn_lg_ops_integration_external_storage]	Stores configuration details for external storage systems such as Google Drive or Box. Extends the Legal Integration table.
Integration Provider [sn_lg_ops_integration_provider]	Stores the details of external apps used by Legal Service Delivery applications. Extends the Application File [sys_metadata] table.
Legal Disposition [sn_lg_ops_legal_disposition]	Stores disposition details for legal requests such as patents, contracts, and lobbying.
Legal Event Schedule Entry [sn_lg_ops_schedule_span]	Stores scheduled items such as meetings or appointments for a legal department user.

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Tables installed with Legal Request Management (continued)

Table	Description
Legal External Folder (sn_lg_ops_external_folder)	Stores URLs and details of folders created in the external storage system to save documents for each legal request. This table is applicable when the **Enable External Storage for attachment** option is added to an intake form. For more information, see Add an intake form to a practice area.
Legal Integration [sn_lg_ops_integration_core]	Stores configuration details of external applications for storage and electronic signatures.
Legal Profile [sn_lg_ops_legal_profile]	Stores all legal data associated with an employee such as active legal holds, full legal name, and citizenship information that can be used for specific Legal Practice Applications (LPAs).
Legal Profile Association [sn_lg_ops_legal_profile_association]	Stores the association between a legal profile and legal requests or legal matters.
Legal Request [sn_lg_ops_request]	Stores legal requests submitted by a user.
Legal Schedules [sn_lg_ops_schedule]	Stores the schedule for a legal department user.
Legal Types [sn_lg_ops_legal_type_mapping]	Stores the legal request type: Legal request, matter, or matter task.
Milestones [sn_lg_ops_milestone_schedule_span]	Stores the milestones related to a legal request.
Option [sn_lg_ops_option]	Stores the predefined options to change the default behavior of legal requests and legal matters. You can set these options while configuring the intake form of a practice area. For more information, see Add an intake form to a practice area. Extends the Application File [sys_metadata] table.
Practice Area [sn_lg_ops_practice_area]	Stores practice area details. Extends the Application File [sys_metadata] table.
Practice Area Lead [sn_lg_ops_m2m_practice_area_lead]	Stores practice area leads for different practice areas.

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Tables installed with Legal Request Management (continued)

Table	Description
Subcategory [sn_lg_ops_subcategory]	Stores the subcategories associated with an intake form of a practice area. Extends the Application File [sys_metadata] table.

Practice area tables for legal requests

Tables specific to practice areas are installed with the Legal Request Management application.

These practice area tables extend the Legal Request [sn_lg_ops_request] table.

If you add columns in a practice area table, you can configure the table to add those columns in the Lists section of Legal Counsel Center. You can also use these tables in other configuration as needed. For more information, see Configure a practice area table.

- Compliance [sn_lg_ops_compliance]
- Corporate Support [sn_lg_ops_corporate_support]
- Crime [sn_lg_ops_crime]
- Digital Forensics [sn_lg_ops_digital_forensics]
- Ethics [sn_lg_ops_ethics]
- General Contract Support [sn_lg_ops_general_contract_support]
- General Legal [sn_lg_ops_general_legal]
- Government Affairs [sn_lg_ops_government_affairs]
- Health, Safety, and Environment [sn_lg_ops_health_safety_and_environment]
- Labor and Employment [sn_lg_ops_labor_and_employment]
- Legal Operations [sn_lg_ops_legal_operations]
- Licensing and Tech Transactions [sn_lg_ops_licensing_and_tech_transactions]
- Litigation [sn_lg_ops_litigation]
- Marketing Support [sn_lg_ops_marketing_support]
- Mergers and Acquisitions [sn_lg_ops_mergers_and_acquisitions]
- Patents, Trademark, and Trade Secrets [sn_lg_ops_patents_trademark_and_trade_secrets]
- Privacy and Data Security [sn_lg_ops_privacy_and_data_security]
- Procurement Contract Support [sn_lg_ops_procurement_contract_support]
- Real Estate [sn_lg_ops_real_estate]
- Sales Contract Support [sn_lg_ops_sales_contract_support]
- Stock Plan Support [sn_lg_ops_stock_plan_support]

Note: Some of the tables listed before have dedicated workflows, as shown in the following table. To maximize their functionality, install the corresponding workflows.

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Practice area table (Legal Request)	Practice area application/workflow
General Contract Support [sn_lg_ops_general_contract_support]	Legal Simple Contracts
Sales Contract Support [sn_lg_ops_sales_contract_support]	
Digital Forensics [sn_lg_ops_digital_forensics]	Legal Digital Forensics
Ethics [sn_lg_ops_ethics]	Legal Investigations
Gifts and entertainment disclosure [sn_lg_ops_gifts_disclosure]	Gifts and entertainment disclosure
Marketing Support [sn_lg_ops_marketing_support]	Legal Content Review
Patents, Trademark, and Trade Secrets [sn_lg_ops_patents_trademark_and_trade_secrets]	Legal Simple Intellectual Property
Privacy and Data Security [sn_lg_ops_privacy_and_data_security]	Legal Simple Privacy
Legal contract Request [sn_lg_ops_contract_request]	Contract Management Pro for Legal Service Delivery

Legal request record - Details tab

List of fields in the **Details** tab of a legal request in the Legal Counsel Center.

A legal request record in the Legal Counsel Center contains the complete information about the request. The **Details** tab contains fields from the legal intake form and other fields required by legal department users.

Details tab fields for a legal request

Field	Description
Number	System-generated number for the legal request.
Practice area	Practice area to which the request belongs.
Category	Category of the legal request associated with the selected practice area.
Subcategory	Subcategory of the legal request associated with the category.
Priority	Level of priority to address the legal request. A higher priority means that the assigned user should act on the legal request sooner.
Watch list	Users with read-only access who can review the legal request and post additional comments in the request. The list shows all users who have the sn_legal_user role.

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Details tab fields for a legal request (continued)

Field	Description
	The request fulfiller can add any user from the list or enter the email address of a user who is not in the list.
Collaborators	Users added to the request to help the legal fulfiller in resolving the request. The collaborators get full access to the request to work on. **Note:** The list shows all users who have the request_fulfiller role.
Opened	Date the legal request was submitted.
Opened by	User who submitted the legal request.
Requested for	User for whom the requester submitted the legal request.
State	Current state of the legal request.
Assignment group	Legal group to which the legal request is assigned.
Assignment group permission	Permission level of the legal request for the assignment group members. • **No Access**: Only the practice area lead and group manager can access the legal request and assign it to one of the members in the assignment group. The assigned user can then work on the legal request. • **Read**: All members from the assignment group can only view the legal request. This option is the default permission level. • **Edit**: All members from the assignment group can view and work on the legal request.
Assigned to	User from the assignment group to whom the legal request is assigned.
Short description	Brief description of the legal request.
Work notes	Comments or notes for the internal users of the legal department who have the access to view the legal request.
Additional comments	Comments or notes for the requester or users in the **Watch list** field who have the access to view the request.

Response Template form

Legal configurator can use the Response Template form to create or modify a response template for reusable messages.

Create or modify a response template by navigating to **All** > **Legal Administration** > **Response Template Configuration**.

Response Template form

Field	Description
Name	Name of the response template.

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Response Template form (continued)

Field	Description
Short Name	Short description that identifies the response template when using chat in Legal Counsel Center. Use the short name with a quick command (/) to show the text from the template body of the response template while in chat. This feature provides a fast and consistent way to populate text while in chat. For example, the short name `gm` identifies the chat response template for a Good Morning greeting. Enter **/gm** in a chat window to show the text from this response template.
Table	Name of the table that the response template is associated with. **Note:** If you're creating a response template for Legal Counsel Center chat, you must select the Interaction [interaction] table. For other response templates, you must select a table from the Legal Service Delivery apps.
Condition	Conditions to determine when the response template is available for use. When defining conditions like case sensitivity or null values, see API GlideFilter - Scoped, Global. **Note:** The conditions available depend on the table that you select. For chat response templates, specify the condition: **[Type] [is] [Chat]**
Application	The application that created the response template.
Group visibility	User groups who have access to the response template. **Note:** Leaving this field empty makes the response template available to all Legal groups.
Template body	Text of the response template that provides instructions to the legal fulfillers on how to respond to an assigned legal request or legal matter.

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Response Template form (continued)

Field	Description
	You can reference field values by selecting variables from the **Variables** list based on the table you select. Place the cursor where you want the custom variable reference to appear, then click **Insert Current User** to insert the current user variable (`${current_user}`) or **Insert Current Date** to insert the current date variable (`${Date}`).
Select variables	Fields from the selected table that you can include in the template body as variables. For example, say you selected the Legal Request [sn_lg_ops_request] table in the **Table** field and then inserted the **Requested for** field variable in the template body. When the response template is used, this field variable will be replaced with the actual name of the user for whom the legal request was submitted.

Legal Matter Management

The ServiceNow® Legal Matter Management application enables you to complete legal requests that need cross-departmental tasking and a workflow with a mechanism to store supporting documents and track important milestones.

- With its embedded record-level security, maintain the confidential and sensitive information of each record. Define a standardized process and workflow for various matter types using matter templates.
- With attorney client privilege workflow, you can mark matter as privileged and confidential to protect sensitive legal communications and comply with attorney-client privilege requirements.
- With the outside counsel engagement workflow, resolve legal matters using the expertise and services of an outside counsel.

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Get started

Explore



Learn about how employees, paralegal staff, and lawyers use Legal Matter Management.

Set up



Set up legal matter templates and complete other configurations.

Assign



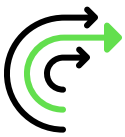
Assign legal matters to matter owners.

Manage



Manage contract requests.

Analytics and Reporting



Coordinate work and improve processes with preconfigured dashboards.

Reference



Get details about components such as roles, tables, plugins, and store applications that are installed.

Exploring Legal Matter Management

Legal Matter Management enables you to manage legal matters and cross-functional tasking to effectively complete legal work. You can store relevant documents and track important milestones of these legal matters from a single place.

Legal Matter Management overview

The ServiceNow® Legal Matter Management application enables you to complete legal requests that need cross-departmental tasking and a workflow with a mechanism to store supporting documents and track important milestones.

Legal Matter Management users

Users

User	Description
Matter Configurator	Matter Configurator configures data such as practice area, category, legal matter templates, and notification templates
Matter Fulfiller	Matter Fulfiller can do the following: • Submit legal matter. • Define phases and task in the workflow.

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Users (continued)

User	Description
	• Mark matter as Privileged and confidential. • Works on assigned legal matter.
Matter Manager	Matter Manager can do the following: • Create and promote legal matter. • Mark matter as Privileged and confidential. • Use Legal Counsel Center to manage and track matter progress.

Legal Matter Management workflow

1. A legal matter is submitted by any of the following method.
   - A paralegal staff or lawyer can promotes a legal request to a legal matter if the request needs additional investigation and substantial time to work on.
     - If the legal request has Privileged and Confidential enabled, the matter is created with Privileged and Confidential status. The matter owner can later remove the Privileged and Confidential status of the matter.
     - If the legal request has Privileged and Confidential disabled, the matter is created also has Privileged and Confidential disabled. You can enable the Privileged and Confidential status later.
   - A practice area lead creates a legal matter directly. These matters do not have any parent legal request though related requests can be added to them.
2. The legal matter is assigned to a matter fulfiller.
3. The legal matter fulfiller performs the following actions as required:
   - Marks a matter as Privileged and Confidential.
   - Initiates an ad hoc approval for a legal matter.
   - Engage with outside counsel.
   - Communicate using emails from Legal Counsel Center.
   - Add a phase to a matter to track specific tasks to complete the matter.
   - Create a task in a legal matter or a phase of the matter that you or another user should perform to resolve the matter.
   - Create an artifact for a legal matter to upload and store documents, emails, and files related to the matter.
   - Add a milestone to a legal matter
   - Associate one or more legal requests with a legal matter to organize and resolve related requests through a single matter.
4. Matter Fulfiller closes the legal request on fulfilling it.

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Legal Matter Management benefits

Legal Matter Management benefits

Benefit	Feature	Users
Matter templates for different practice areas with predefined phases and tasks	Legal matter templates	Matter configurator
Track and complete tasks and milestones through notifications	Create a task for a legal matter	Matter fulfiller
Make meaningful decisions by gaining real-time visibility on legal matters	Analytics and Reporting Solutions for Legal Service Delivery	Matter Manager
Track, prioritize, and work on multiple legal matters concurrently with an optimized Legal Counsel Center	Legal Counsel Center	Matter fulfiller and Matter Manager
Attorney Client Privilege enables legal fulfillers to mark legal requests as privileged and confidential. This capability helps you protect sensitive legal communications and comply with attorney-client privilege requirements.	Attorney Client Privilege	Legal Fulfiller and matter owner
Engage with outside firms & counsels by integrating legal matters with Legal Tracker application to track areas or matters handled by outside counsels and track spends on outside counsel engagement.	Engage with outside counsel	Matter fulfiller

What to explore next

To learn more about configuring and using Legal Matter Management, see:

- Setting up Legal Matter Management
- Work on a legal matter
- Legal Matter Management reference

Integrate Legal Matter Management with the Legal Tracker application

Learn more about the integration through a sample workflow and review the benefits it can provide.

Legal Tracker is a third-party application for legal operations including matter management and e-billing.

By integrating Legal Matter Management with Legal Tracker, you can engage with outside counsel by automatically creating a matter in Legal Tracker. You can also track the outside counsel engagement spends.

https://player.vimeo.com/video/1060415894?h=4dfbed1d0c&badge=0&autopause=0&player_id=0&app_id=58479

Benefits of integration with Legal Tracker

The benefits of integration are:

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- Engage and track outside counsel engagement.
- Automatic matter creation in Legal Tracker on approval of Outside Counsel Engagements.
- The matter created in the Legal Tracker can be accessed and updated by the outside counsel.
- Single interface to track and view the updates from Legal Tracker for the Outside Counsel Engagement requests.
- Track the spends for the outside counsel engagement.

Sample workflow for outside counsel engagement using Legal Tracker

1. Legal matter fulfiller reviews a legal matter.
2. Legal matter fulfiller decides to engage with an outside counsel.
3. Legal matter fulfiller initiates an outside counsel engagement request.
4. Legal matter fulfiller enters Legal Tracker details or opts to create a task for the information to be filled later.
5. Legal matter fulfiller submits the outside counsel request for approval.
6. Practice area leads receive an approval request.
7. Practice area lead reviews and approves the outside counsel engagement request. If there are more than one practice area leads, approval from any one is required to mark the request approved.
   a. If the Legal Tracker details are already filled, an integration with Legal Tracker is automatically initiated.
   b. In cases where a task is created to fill the Legal Tracker details, the task fulfiller should initiate the integration manually after filling the details.
8. On successful integration, matter is created in Legal Tracker.
9. Matter details are synced to Legal Matter Management and can be viewed in external matter related list.
10. Outside counsel can access and update the matter in Legal Tracker.

Integration actions

To integrate Legal Matter Management with Legal Tracker, complete the following actions:

- Install the Legal Tracker spoke. For more information, see Legal Tracker Spoke.
- Configure Legal Tracker integration. For more information, see Configure Legal Matter Management to engage with outside counsel using Legal Tracker.

Attorney Client Privilege

Attorney Client Privilege enables legal fulfiller or matter owner to designate legal matters as privileged and confidential. It restricts access to authorized stakeholders, marks communications with confidentiality banners, and maintains a document audit trail to help you protect sensitive legal communications.

Attorney Client Privilege applies to following:

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- Legal Request: Legal fulfillers can mark legal requests as privileged and confidential, when the request is in Assigned or Work in Progress state. The system enforces access control, adds confidentiality markers to emails, and restricts collaboration to authorized stakeholders.
- Legal Matter: Legal fulfillers and matter owners can independently mark or unmark individual matters as privileged and confidential, provided the matter is in the Assigned or Work in Progress state.

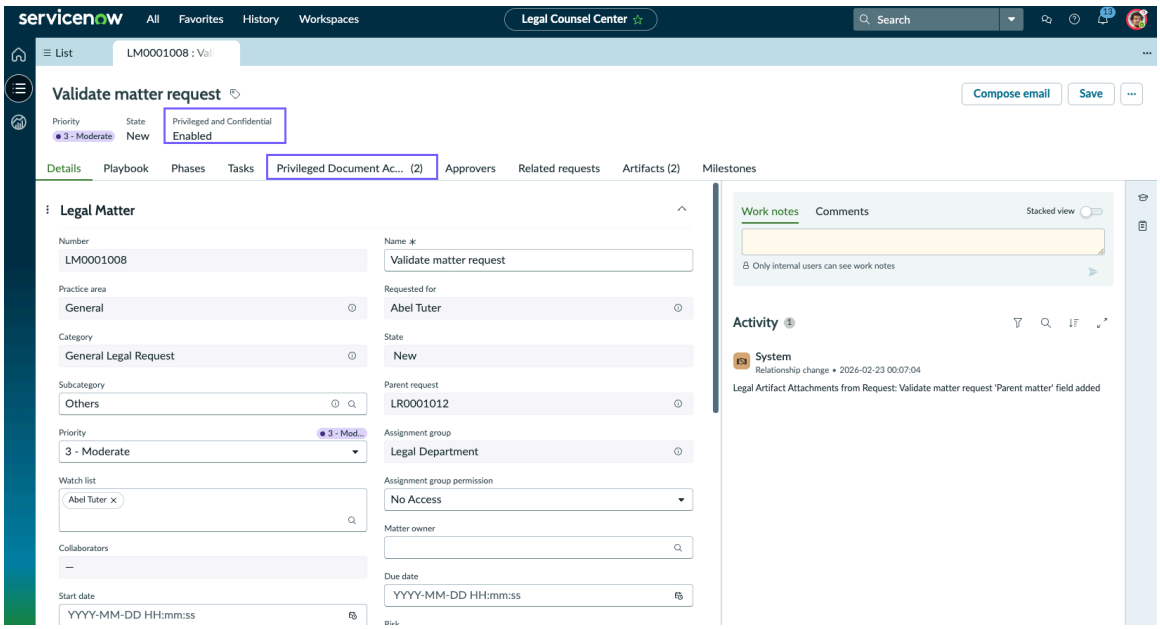
Assignment group permission changes

When privileged and confidential is enabled on a legal matter, the system automatically updates the assignment group permission to No access.

Indicators of a privileged and confidential matter

You can identify a privileged and confidential matter by following UI elements.

- Privileged and Confidential flag: Displayed in the secondary header of the matter when it is marked as privileged and confidential.
- Privileged document access related list to display the status of each attachment.



Email notifications

Email communications generated from Privileged and Confidential matters include confidentiality markers to comply with legal requirements. This applies to both system-generated notifications and fulfiller-initiated outbound emails.

Stakeholder change notifications

When the collaborator list, watchlist, or fulfiller assignment is modified for a privileged and confidential matter, the system sends email notifications to the requester, fulfiller, and collaborators. Notifications are triggered when:

- A new collaborator is added to the matter.
- A new watchlist entry is added.
- The fulfiller assignment changes.

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All notifications for privileged and confidential matter include the confidentiality markers.

Promote legal request to legal matter

You can promote a legal request to legal matter by creating a new matter or adding to an existing matter.

- When legal request is promoted by creating a new matter, the Privileged and Confidential status of the created matter is dependent on the Privileged and Confidential status of the request. You can change the status later.
- When legal request is promoted by adding to an existing matter, the Privileged and Confidential status of the existing matter is retained irrespective of the Privileged and Confidential status of the request.

The Privileged and Confidential status of a legal request and its associated matter are tracked independently. Changing the Privileged and Confidential status of a request does not automatically change the Privileged and Confidential status of the associated matter, and vice versa.

Related topics

Work on a legal matter

Disable attorney client privilege for legal matter

Setting up Legal Matter Management

Configure the foundation data for legal matters through Legal Matter Management to provide legal services to employees.

Configuration overview

- Legal matter templates

  Create legal matter templates to standardize legal procedures for handling legal matters.

- Email notifications

  Configure email notifications to be sent when specific events occur, such as when a legal matter is assigned to a matter owner or when a matter is closed or canceled.

- Configure Legal Matter Management to engage with outside counsel using Legal Tracker

  Configure the requirements to enable outside counsel engagement and matter creation in Legal Tracker.

Install Legal Matter Management

You can install the Legal Matter Management application (sn_lg_matter) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- If the application requires plugins or other store applications, install them first if they are not already installed.
- Review the Legal Matter Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following components are installed with installation of the Legal Matter Management application:

- Plugins
- Store applications
- Roles
- Tables
- Tables specific to practice areas
- Business Rules

See Components installed with Legal Matter Management for more information.

You can also install the following applications:

Legal Counsel Center application (sn_lg_cf_workspace)

The ServiceNow® Legal Counsel Center application enables lawyers to solve issues faster with a workspace built to facilitate resolutions. From a single view, get the full context of legal issues to resolve them quickly.

Legal Counsel Center Components (sn_lg_ws_comps)

The ServiceNow® Legal Counsel Center Components application enhances the workspace experience for the Legal Counsel Center by decoupling the components in the Legal Counsel Center to offer better performance.

Legal Mobile (sn_lg_mobile)

The ServiceNow® Legal Mobile (sn_lg_mobile) application enables you to find legal information, submit and track legal requests, and work on these requests on mobile devices. For more information, see Legal Mobile.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Matter Management application (sn_lg_matter) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Matter Management.

4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

What to do next
Use the Legal Service Delivery Guided Setup to configure the application on your instance.

To access Legal Service Delivery Guided Setup, navigate to **Legal Administration** > **Legal Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Legal matter templates

Legal matter templates help you standardize legal procedures, policies, and workflows for various matter types.

Create a legal matter template

Create a legal matter template that you can apply to a legal matter when promoting from a legal request. The legal matter created using the template contains predefined data such as phases, tasks, ownership, and approvals.

Before you begin
Role required: sn_lg_matter.matter_config

About this task
You can also reuse an existing matter template to create a matter template. To do that, you can open an existing template and copy it using the **Copy Template** related link. You can then modify the newly created template as required.

Procedure
1. Navigate to **All** > **Legal Matter** > **Templates** > **All**.
2. Click **New**.
3. On the form, fill in the fields.

Matter Template form

Field	Description
Number	System-generated template number.
Name	Unique name for the matter template.
Flow	Workflow associated with the matter.
State	State of the matter template. The default value when creating a matter template is Draft.

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Field	Description
Active	Option for marking the matter template active. Only active matter templates are available for selection when creating a matter.
Intake form mapping	The intake form to which the matter is mapped. While promoting a legal request to a matter, the intake form mapping enables the associated matter template available for legal fulfillers to select and apply to the promoted matter.
Matter Defaults section	
Template	Default values that pre-populate the fields of a legal matter form that is created using the template. Select a field from the list and enter a default value.

4. Click **Submit**.
   A legal matter template is created in the Draft state. The Phases, Tasks, Approvals, and Approver Groups related lists are displayed.
5. In the Phases related list, create phase templates.
6. In the Tasks related list, create task templates.
   You can also create matter task templates from the Tasks related list on the Matter Phase Template form.
7. In the Approver Groups related list, add user groups to whom the matter template is sent for approval.

   a. In the Approver Groups related list, click **Edit**.

   b. On the Edit Members form, select a user group from the **Collection** list and click **Add** to add it to the **Approver Groups List**.
   Only the user groups from the Legal department are listed in the **Collection** list.

   c. Click **Save**.
   The selected approver groups are added to the Approver Groups related list. The members of these groups are listed in the Approvals related list. An email notification is sent to these members for approval of the matter template.

   Note: Any user who belongs to multiple groups will only receive one notification and will only appear once in the Approvals list.

8. Click **Submit for approval**.

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- If an approver group is selected, the template is sent to the group for approval. The state of the matter template updates to Waiting Approval. Anyone from the approver group can review and approve the matter template to publish it.
- If an approver group is not selected, the matter is directly published and its state is Published.

Note: When an existing matter template is updated and published, any associated intake forms reflect the latest version of the template.

Create a phase template for a matter template

Create a phase template for a matter template for resolving the matter in an organized way. When you apply a legal matter template while creating a matter, the associated phases from the template are added by default to the matter.

Before you begin

Role required: sn_lg_matter.matter_config

Procedure

1. Navigate to **All** > **Legal Matter** > **Templates** > **All**.
2. Open a matter template.
3. In the Phases related list, click **New**.
4. On the form, fill in the fields.

Matter Phase Template form

Field	Description
Number	System-generated phase template number.
Name	Unique name for the phase template.
Parent matter	Matter template to which the phase template belongs.
Order	Number that determines the order in which the phase should be worked on to resolve the matter. A phase template with a lower-order number is higher in the queue to be worked on.

5. Click **Submit**.

What to do next

Create task templates within a phase template.

Create a task template within a phase template

Create a task template within a phase template of a legal matter template. When you apply a legal matter template while creating a matter, the associated phases and tasks from the template are added by default to the matter.

Before you begin

Role required: sn_lg_matter.matter_config

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Procedure

1. Navigate to **All** > **Legal Matter** > **Templates** > **All**.
2. Open a matter template.
3. In the Phases related list, open a phase template to which you want to add a task template.
4. In the Matter Task Templates related list, click **New**.
5. On the form, fill in the fields.

Matter Task Template form

Field	Description
Number	System-generated task template number.
Name	Unique name for the task template.
Parent	Phase template to which the task template belongs.
Order	Number that determines the order in which the task should be worked on to resolve the matter. A task template with a lower-order number is higher in the queue to be worked on.
Task Defaults section	
Template	Default values populated in fields on a task form in the legal matter that is created using the matter template. Select a field from the list and enter value for it.

6. Click **Submit**.
   A task template is created. The **Checklist** section appears.
7. **Optional:** Add to-do items in the **Checklist** section to provide a list of activities for the task fulfiller.
   a. Click the more actions icon () next to the **Checklist**.
   b. Click **Create new**.
   c. Enter a description for the to-do item and press the Enter key.
   This checklist appears as the default to-do items in the task.
8. Click **Update**.

Approve or reject a matter template

Review and approve or reject a matter template that is assigned to a user group of which you are a member. An approved matter template is published and is available for use when promoting legal requests to legal matters.

Before you begin

Role required: approver_user

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Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Open a matter template for review that has a state of **Requested**.
3. In the Summary of Item being approved section, review the matter template details.
4. Approve or reject the matter template.
   - To approve the matter template for publication, click **Approve**.

     The state of the approval request updates to **Approved**.
   - To reject the matter template, click **Reject**.

     The state of the approval request updates to **Rejected**.

Result

- If you approve, the matter template is published. The state of the matter template record updates to Published.
- If you reject, the matter template state updates to Draft. The user who created the matter template can work on the template again to complete the required information and resubmit for approval.

Configure Legal Matter Management to engage with outside counsel using Legal Tracker

Configure the requirements to enable outside counsel engagement and matter creation in Legal Tracker.

To integrate Legal Matter Management with Legal Tracker, ensure you have installed the Legal Tracker Spoke. For more information, see Legal Tracker.

Configure Legal Tracker instance URL

Update the system properties to generate the URL specific to External Matter that is displayed in the Legal Tracker matter link field. By selecting the URL, the user can directly open the matter in the Legal Tracker application.

Before you begin

Ensure you have installed and activated Legal Tracker spoke. For more information, see Legal Tracker.

Role required: admin

Procedure

1. In the navigation filter, type `sys_properties.list`.
2. On the System Properties page, in the Name search field, enter `sn_lg_matter.legal_tracker_host_url`.
3. Select the system property.
4. **Optional:** In the information message at the top of the page about the current application, select **here** to be able to edit the form.
5. In the **Value** field, enter the instance URL for the Legal Tracker application.
6. Select **Update**.

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Result
The system property update to add the new URL to directly open external matters for the Legal Tracker application that is to be integrated with Legal Matter Management.

Configure the webhook registry

Configure a callback URL for communication between the Legal Matter Management and Legal Tracker applications.

Before you begin
Ensure you have installed and activated Legal Tracker spoke. For more information, see Legal Tracker.

Role required: admin, sn_lg_ops.legal_fulfiller

About this task
Configuring the webhook registry is required to synchronize updates in the External Matter record in the Legal Matter Management from the Legal Tracker application. After successful configuration, the Health status of the configuration must be Healthy. If the status is Broken, synchronization of the updates fails.

Procedure
1. Set the application scope to Legal Matter Management.
2. **Optional:** If the application scope is not set correctly, perform the following:
   a. Select the Application scope icon ( ).
   b. Select the option **Application scope**.
   c. In the filter navigator, search for and select Legal Matter Management.
   d. Refresh the page.
3. Navigate to **All** > **System Definition** > **Tables**.
4. Select **Label** for the Search scope and enter `webhook`.
5. Select **Legal Tracker Webhook Registry** from the list.
6. Select **Show Form** from the Related Links section.
7. In the Description field, enter the description of the webhook.
8. In the Token field, fill in the details.
   a. Select the Lookup using the list icon .
   b. Select **New**.
   c. Fill in the details in the **Token Verification New Record** form.

Token Verification New Record form

Field	Description
Name	Name of the token.
Description	Description of the token.

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Field	Description
Token	Password to access the token.

d. Select **Submit**.

9. In the Name field, enter the name of the webhook.
10. Right-click in the page header and select **Save**.
11. Select **Callback URL**.
    In the info message that appears, the Callback URL is displayed. Copy this URL to use in the Callback URL field in the Legal Tracker platform.
12. Log in to your Legal Tracker instance and select the settings icon ( ).
13. In the Integrations section, select **Webhooks**.
14. In the Matters section of the Webhooks page, select **Add a new webhook**.
15. On the form, fill in the fields.

Create webhook form

Field	Description
Callback URL	The Callback URL information copied from the Token Verification page.
Events	Events for which automated information is available on the Legal Matter. The available options are: The **Create** and **Update** check box must be selected to receive the information in the associated Legal Matter for any new or modification made in the Legal Tracker platform.
Secret key	Password to access the webhook information.

16. Select **Save & close**.

Result

The webhook for the Legal Tracker application is successfully configured and the matter updates in Legal Tracker will be synced to Legal Matter Management and the details can be seen in external matter records. For a working webhook configuration, the Health status must be Healthy. For any wrong configurations, the Health status is shown as Broken.

Configure data to enable matter creation in Legal Tracker

Configure the data that is required to create a matter in Legal Tracker.

Matter type template in Legal Tracker helps define the fields and default options that are tracked for each matter type. This enables administrators to determine what data will be tracked in Legal Tracker matters. The current integration supports the minimal fields required by the Legal Tracker to create matter. Administrators should identify matter type templates with additional required fields for matter creation and create the records for them in the table Legal Tracker Matter Template [sn_lg_matter_legal_tracker_matter_template].

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Data configured in tables serve as values, which submitters select when submitting an outside engagement request form. The values are used in the Legal Tracker to generate a matter.

To avoid failures while creating matter in Legal Tracker, administrators should maintain the same data as in Legal Tracker in the following tables.

Legal Tracker tables

Name	Table
Outside Counsel	sn_lg_matter_outside_counsel **Note:** For more information, see Add outside counsel details
Invoice Approval Route	sn_lg_matter_legal_tracker_invoice_approval_route **Note:** For more information, see Add approval route details

Add outside counsel details

Add outside counsel details for an outside firm to enable matter creation in Legal Tracker.

Before you begin

Ensure you have installed and activated Legal Tracker spoke. For more information, see Legal Tracker.

Verify the schedule job **Fetch Firms Data** has been executed once before you add the outside counsel details for an outside firm.

Role required: sn_lg_matter.matter_config, sn_lg_matter.matter_fulfiller

About this task

To create a matter in Legal Tracker, the information related to an outside firm and its outside counsels should be present in both Legal Tracker and Legal Matter Management.

The scheduled job **Fetch Firms Data** pulls the data for outside firms from Legal Tracker into Legal Matter Management, but there is no scheduled job to pull the name and email of the outside counsels. For enabling matter creation, manually add the outside counsel name and email for the outside firm in Legal Matter Management.

Procedure

1. Collect the outside counsel name and email address for the outside firm from Legal Tracker.
2. Open the outside counsels list.

Location	Actions
From the Legal Matter module	Navigate to **All** > **Legal Matter** > **Outside Counsel Setup** > **Setup Outside Counsels**.
From Legal Counsel Center	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Select the List icon ( ) from the primary navigation and in the Outside Counsel section of the **Lists** menu, select **All**.

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3. Select the outside counsel for which you want to add the details.
4. On the form, fill in the fields.

Outside counsel form

Field	Description
Outside Firm	This field is automatically set to the outside firm name.
Outside Counsel Name	Name of the outside counsel.
Outside Counsel Email	Email address of the outside counsel.
Active	Option to make the Outside Counsel record active.

5. Save the Outside Counsel record.
   - If you have added details from the Legal Matter module, select **Update**.
   - If you have added details from the Legal Counsel Center, select **Save**.

Add approval route details

Add approval route details in Legal Matter Management to enable matter creation in Legal Tracker.

Before you begin

Ensure you have installed and activated Legal Tracker spoke. For more information, see Legal Tracker.

Role required: sn_lg_matter.matter_config, sn_lg_matter.matter_fulfiller

About this task

To create a matter in Legal Tracker, the information related to the approval route should be present in both Legal Tracker and Legal Matter Management.

As there is no scheduled job to pull the approval route details, you must manually add it in Legal Matter Management.

Procedure

1. Collect the approval route details from Legal Tracker.
2. In the navigation filter, enter:
   `sn_lg_matter_legal_tracker_invoice_approval_route.list`
3. Select **New**.
4. On the form, fill in the details as present in the Legal Tracker.

Legal Tracker Invoice Approval Routes form

Field	Description
Invoice Approval Route Name	Invoice Approval Route Name from the Legal Tracker.
Active	Option to make the approval route active.
Domain	Name of the outside counsel.

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Field	Description
Invoice Approval Route ID	Invoice Approval Route Name from the Legal Tracker.

5. Select **Submit** to save the record.

Configure the currency symbol for activity stream

Configure currency to be displayed in the activity stream.

Before you begin

Role required: sn_lg_ops.legal_config

About this task

By default, the activity stream displays currency and price fields converted into the user's session locale. Configure the system property `glide.sys.audit_currency_value` to view the currency and price fields as in the value field.

Procedure

1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `glide.sys.audit_currency_value` property.
3. Select the property.
4. Update the **Value** field to `true`.
5. Select **Update**.

Enable the option to engage with outside counsel for a matter

Enable legal fulfiller to submit requests for outside counsel engagements for a matter.

Before you begin

- Ensure you have installed and activated Legal Tracker spoke. For more information, see Legal Tracker.

  Important: After setting up the spoke, give the Legal Tracker Spoke user [sn_legal_trckr_spk.user] role to users accessing Legal Tracker

- Ensure you have selected Practice Areas intake forms where the record type is either of the following:
  - Matter
  - Request and Matter
- Ensure you have added details for the outside counsels and approval route. For more information, see Add outside counsel details and Add approval route details.

Role required: sn_lg_ops.legal_config

About this task

While working on matters, you may want to engage with outside counsel to get additional services. You can submit a request to engage with the outside counsel. To view the **Add outside counsel for Legal Tracker** option in a legal matter, you must enable Outside Counsel on Matter for the Practice Areas.

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Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Select a record from the list of Practice Areas.
3. Select the intake form from the **Intake Forms** tab.
4. In the information message at the top of the page about the current application, select **here** to be able to edit the form.
5. Select the Unlock Options icon in the **Options** field in the Record Producer section.
6. Enter `Enable` in the **Select target record** field.
7. Select **Enable Outside Counsel on Matter** from the list.
8. Select **Update**.

Result

The **Add Outside Counsel for Legal Tracker** button is available in the **Outside Counsel** tab of a matter. Users with the matter fulfiller role and access to update matters can submit Outside Counsel Engagement for Legal Tracker. This option is applicable only for matter and not for requests.

Using Legal Matter Management

Create or promote legal matter to complete legal requests that need cross-departmental tasking and a workflow with a mechanism to store supporting documents and track important milestones.

Overview of using Legal Matter Management

To submit and track legal matters refer to the following tasks.

Assign a legal matter to a legal group user

Assign a legal matter to yourself or to someone in the assignment group to start working on the matter.

Before you begin

Role required: sn_lg_matter.matter_manager

About this task

During the creation of a legal matter either directly or by promoting a legal request, it is assigned to an assignment group. The practice area lead or the group manager can assign the legal matter to themselves or to another member of the group.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, under **Legal Matters**, click **Unassigned**.
4. In the list of unassigned matters, click a matter number to open.
5. In the **Details** tab, select your name or the name of another user in the **Matter owner** field to work on the matter.
6. **Optional:** Update the **Assignment Group Permission** to change the permission level of the legal matter for the assigned user group.

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- **No Access**: Only the practice area lead, group manager, and matter owner (user in the **Matter owner** field) can access and work on the legal matter.
- **Read**: All members from the assignment group can only view the legal matter.
- **Edit**: All members from the assignment group can view and edit the legal matter.

Note: The matter owner, practice area lead, or group manager can set the assignment group permissions on the legal matter.

7. Click **Save**.

Result
The legal matter is assigned to the selected member of the user group. The state of the matter updates to Assigned.

What to do next
The assigned member can start working on the legal matter.

Work on a legal matter

As a matter owner, work on a legal matter assigned to you to resolve issues or answer queries.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

About this task
When a legal request is promoted to a legal matter, the Privileged and Confidential status of the request determines the initial Privileged and Confidential status of the matter.

- If the legal request has Privileged and Confidential enabled, the matter is created with Privileged and Confidential status. The matter owner can later remove the Privileged and Confidential status of the matter.
- If the legal request has Privileged and Confidential disabled, the matter is created also has Privileged and Confidential disabled. You can enable the Privileged and Confidential status later.

The Privileged and Confidential status of a legal request and its associated matter are tracked independently. Changing the Privileged and Confidential status of a request does not automatically change the Privileged and Confidential status of the associated matter, and vice versa.

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Note: During times when you're unavailable, you can delegate your legal duties to other users.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

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Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. **Optional:** Enable privilege and confidential status.

   a. Select **Enable Privilege and Confidential** if already not enabled.
   The enable action is available only when the matter is in the Assigned or Work in progress state. Requests in states such as Closed Complete, Closed Incomplete, or Cancelled cannot have their Privileged and Confidential status changed.

   b. On the confirmation modal, select **Continue**.

   - The legal matter is marked as Privileged and Confidential.
   - The assignment group permission is automatically updated to No Access. You can manually modify the assignment group permission.
   - In the Privileged Document Access tab, the document permissions are marked as Privileged & confidential. Access to these documents for users is controlled by the Assignment group permissions.
   - Privileged and Confidential field in the secondary header is changed to Enabled.
   - Notifications and outbound emails from the request automatically include "privileged and confidential" markers in the email content.
   - Stakeholders are notified when changes occur to the collaborator list, watchlist, or fulfiller assignment for a privileged and confidential enabled request.

5. **Optional:** Change permission for attachments.
   The document permission is marked as Privileged & confidential when the request status is set as privileged and confidential, and resets to Public when the status is removed. Access to these documents for users is controlled by the Assignment group permissions.

   a. Navigate to **Privileged Document Access**.
   The **Privileged Document Access** tab appears when Privileged and confidential status is enabled.

   b. Select the check box next to the document for which you want to change the permission.

   c. Select **Manage Access**.

   d. Select the option applicable.

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- Privileged and Confidential – Protects documents under legal privilege and confidentiality. Use this option for sensitive communications between an attorney and client.
- Legal Work Product Protected – Restricts access to internal legal analysis, drafts, or investigation notes prepared in anticipation of litigation.
- Public – Marks documents as freely shareable externally without restrictions.

e. Select **Update**.

6. **Optional:** Update the **Assignment Group Permission** to change the permission level of the legal matter for the assigned user group.
   - **No Access**: Only the practice area lead, group manager, and matter owner (user in the **Matter owner** field) can access and work on the legal matter.
   - **Read**: All members from the assignment group can only view the legal matter.
   - **Edit**: All members from the assignment group can view and edit the legal matter.

   Note: The matter owner, practice area lead, or group manager can set the assignment group permissions on the legal matter.

7. Create artifacts (folders) and attach files to a legal matter artifact to store the collected supporting documents within the matter.
8. **Optional:** If the request must be reassigned to a new assignment group due to business needs, select a new assignment group in the **Assignment group** field.

   Note: Editing of the **Assignment group** field is available only when the **Editable Assignment group in Matter** option is configured in the associated intake form.

   When the assignment group is changed, existing group members who are not in the updated assignment group might lose access to the matter. The **Matter owner** field is also cleared, and the matter owner is notified via email.
9. **Optional:** If you need help from other fulfillers to work on the legal matter, add them in the **Collaborators** field.

   Note: Users with the matter_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal matter.
10. **Optional:** Initiate an ad hoc approval for the legal matter or its artifact's content when an approval is required from other stakeholders.
11. **Optional:** Engage with outside counsel while resolving matters.
12. **Optional:** Communicate with the requester or other stakeholders using emails, chats, work notes, or comments.
    - Using emails: Communicate with any stakeholders using emails. For more information, see Communicate using emails.
    - Using live chats: Communicate with any stakeholders using chats. For more information, see Start a chat session through Legal Counsel Center Inbox.
    - Using Comments: To communicate with the requester or other stakeholders, in the Compose section, enter your message in the **Comments** field and click **Post Comments**.
    - Using Work notes: Communicate with the other members of the legal department, in the Compose section, enter your message in the **Work notes** field and click **Post Work notes**.

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Using response templates, you can insert predefined content into emails, chats, and legal request and legal matter form fields such as **Comments** and **Work notes**. Select the response template icon () and find an appropriate response template based on the subject of your email. Copy and paste the template's content into the required field.

Note: Response templates configured for legal services are only available to use.

For legal matters enabled for attorney client privilege, markers are added to the email content to indicate the privileged and confidential status.

13. **Optional:** Create and manage a checklist of items in the Counsel Assist section to track what should be done to resolve the legal matter.
14. Create phases and tasks under phases to organize the investigation.
    You can assign these tasks to users across various departments in your organization.
15. Add milestones to keep a track of timelines to complete important tasks.
16. **Optional:** Associate the matter with another legal request that is similar in nature.
17. Either close the legal matter after you have completed the required activities or cancel it if it does not need further action.
    - To close the matter, follow the instructions in Close the legal matter.
    - To cancel the matter, click the more actions button () and select **Cancel**.
18. If new information surfaces or further investigation is required reopen the legal matter after it has been closed or canceled.

Initiate an ad hoc approval for a legal matter or its artifact

Initiate an ad hoc approval for a legal matter or its artifacts from a user or a user group.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

About this task

Some cases where approvals can be requested for a legal matter or its artifact include:

- Approval for legal contract documents from stakeholders.
- Ad hoc approval for a legal matter that needs an authorization from the privacy team before it can be processed.

You can assign these approvals to any user or user group in your organization who have the legal_user role. When you initiate an approval, the approvers receive an email notification and can review and act on the approval.

Note:

- If a legal matter or artifact already has a pending approval record, you cannot initiate another approval for the same item.
- Attachments that have an ad hoc approval record in the Requested state cannot be removed from a legal matter. To remove such attachments, either cancel the ad hoc approval request or obtain the approval first.
- When you remove an attachment from a legal matter, it also deletes the associated ad hoc approval records.

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As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. In the **Approvers** tab, click **Initiate Approval**.

   You can also initiate an approval by clicking the more actions button ( ) and selecting **Initiate Approval**.
5. On the Initiate Approval dialog box, fill in the fields.

Initiate Approval dialog box

Field	Description
Approval for	Item that needs an approval. ○ **Matter**: Get approval for the entire legal matter. ○ **Artifact**: Get approval for one or all attachments in an artifact.
Select artifact	Artifact in the legal matter for which approval is required. This field appears only when **Artifact** is selected from **Approval for**.
Select attachment	Attachment in the selected artifact for which approval is required. Choose a specific attachment for approval, or leave the field empty to get approval for all attachments. This field appears only when you select an artifact in the **Select artifact** field.

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Field	Description
Select document	Documents attached to the legal matter for which approval is required. This field appears only when **Document** is selected from **Approval for**. **Note:** The Document option in the list appears only when the external storage option is enabled on the intake form.
Approval by	Approval required at user level or user group level. ○ **User**: Get approval from an individual user. ○ **User group**: Get approval from a set of users. The **Select user** field is replaced by the **Select user group** field.
Select user	User or user group who must approve the item. **Note:** Users or user groups with the legal_user role are listed. ○ If you selected **User** in the **Approval by** field, select a user from whom the approval is required. ○ If you selected **User group** in the **Approval by** field, select a user group from which the approval is required. Only users and user groups with sn_lg_ops.legal_user role will be available for selection.
Approval note	Note for the selected user or user group.

6. Click **Initiate**.

Result

Assigned approvers are added in the **Approvers** tab based on the following conditions:

- If you selected **User** in the **Approval by** field, an approval record is created for the selected user.
- If you selected **User group** in the **Approval by** field, an approval record for each user in the selected user group is created. Anyone from the group can approve.

If the external storage option is enabled, document in a legal matter artifact are stored in the external storage systems. Based on the approval request, the document access to the approvers is at the matter, artifact, or document level. For more information on document access, see Document access in a legal matter.

The assigned approvers get an email notification with a link to open the record for review and action.

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Note:

- An attachment cannot be deleted after an ad hoc approval is initiated and is in the Requested state. To remove such attachments, either cancel the ad hoc approval request or obtain the approval first.
- When you remove an attachment from a legal matter, it also deletes the associated ad hoc approval records. A work note is posted with the deletion details in the Activity stream of the legal matter.

The approval details appear under the **Approvals** tab on the Standard Ticket page.

What to do next

Approvers can review and approve or reject the requested item.

Cancel an ad hoc approval for a legal matter

Cancel an ad hoc approval for a legal matter if it no longer requires any action.

Before you begin

You can only cancel an ad hoc approval that is in the Requested state.

Role required: sn_lg_ops.legal_fulfiller

About this task

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. In the **Approvers** tab, click **Cancel Approval**.
5. In the Cancel Approval dialog box, select the approval record from the **Approval for** field that you want to cancel.
6. Enter comments for canceling the approval record and click **Confirm Cancellation**.

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Result

The approval record is canceled and its state updates to Cancelled and comments are added to the approval record. If the approval was requested from a user group, then the corresponding approval records for all users in the user group are canceled.

Engage with outside counsel

Engage with outside counsel to benefit from their expertise for resolving legal matters.

The following options are available for outside counsel engagement.

- Using the Legal Invention Disclosure workflow, you can enable inventors to disclose their inventions in a structured manner. For more information, see Legal Invention Disclosure.
- Using integration with Legal Tracker, you can engage with outside counsel, by automatically creating matters in Legal Tracker to track updates and spends on outside counsel engagement.

Sample workflow for outside counsel engagement using Legal Tracker

1. Legal matter fulfiller reviews a legal matter.
2. Legal matter fulfiller decides to engage with an outside counsel.
3. Legal matter fulfiller initiates an outside counsel engagement request.
4. Legal matter fulfiller enters Legal Tracker details or opts to create a task for the information to be filled later.
5. Legal matter fulfiller submits the outside counsel request for approval.
6. Practice area leads receive an approval request.
7. Practice area lead reviews and approves the outside counsel engagement request. If there are more than one practice area leads, approval from any one is required to mark the request approved.
   a. If the Legal Tracker details are already filled, an integration with Legal Tracker is automatically initiated.
   b. In cases where a task is created to fill the Legal Tracker details, the task fulfiller should initiate the integration manually after filling the details.
8. On successful integration, matter is created in Legal Tracker.
9. Matter details are synced to Legal Matter Management and can be viewed in external matter related list.
10. Outside counsel can access and update the matter in Legal Tracker.

    When outside counsel reopens or closes an external matter in the legal tracker, the matter status field is automatically updated with a comment in the activity stream in the Legal Counsel Center.

Request Outside Counsel engagement

As a legal fulfiller, create an outside counsel engagement request for a matter.

Before you begin

Ensure you have configured Legal Matter Management to engage with outside counsel. For more information, see Configure Legal Matter Management to engage with outside counsel using Legal Tracker.

Role required: sn_lg_matter.matter_fulfiller, sn_lg_ops.legal_fulfiller

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Procedure

1. Open a legal matter.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the **View All** option on the Matters widget. **c.** From the list, open a legal matter. **d.** Select the **Outside Counsels** tab.
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon ( ). **c.** In the Lists tab, navigate to **Matters** > **All**. **d.** From the list, open a legal matter. **e.** Select the **Outside Counsels** tab.
Using platform view	**a.** Navigate to **All** > **Legal Matter** > **Matter** > **All** **b.** From the list, open a legal matter. **c.** Navigate to Outside Counsels tab related list.

2. Select **Add outside counsel for Legal Tracker** from the down arrow on **Add outside counsel**.
3. On the form, fill in the fields.
   For more information on the form fields, see Legal Tracker Outside Counsel Engagement request form.
4. If do not have the complete the Legal Tracker details and want it to be filled later, select the **Create a task for entering Legal Tracker field details** check box.
   A task will be created to fill in the Legal Tracker details once the outside counsel request is approved. You need to fill in the details and submit the outside counsel engagement request for integration with Legal Tracker. For more information, see Assign task created for filling Legal Tracker details and Enter Legal Tracker details and submit for integration.
5. Select **Save**.

Submit outside counsel engagement request for approval

As a legal fulfiller, submit an outside counsel engagement request for approval.

Before you begin

Role required: sn_lg_matter.matter_fulfiller, sn_lg_ops.legal_fulfiller

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Procedure

1. Open a legal matter.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the **View All** option on the Matters widget. **c.** Select the **Outside Counsels** tab.
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon (). **c.** In the Lists tab, navigate to **Matters** > **All**. **d.** Select the **Outside Counsels** tab.
Using platform view	**a.** Navigate to **All** > **Legal Matter** > **Matter** > **All** **b.** From the list, open a legal matter. **c.** Navigate to Outside Counsels tab related list.

2. From the list, open the outside counsel engagement request.
3. Select **Submit for Approval**.

Approve or reject outside counsel engagement request

As a practice area lead, approve the outside counsel engagement request.

Before you begin

Role required: sn_lg_matter.matter_fulfiller, sn_lg_ops.legal_fulfiller

Procedure

1. Open the outside counsel engagement approval request.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the **View All** option on the Pending approvals widget. **c.** From the list, open the record for approval.
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon (). **c.** In the Lists tab, navigate to **My Work** > **Items Pending Approval**. **d.** From the list, open the record for approval.

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Method	Action
Using platform view	**a.** Navigate to **All** > **Self Service** > **My approvals** **b.** From the list, open the record for approval.

2. Review the record and either approve or reject:
   - To approve the outside counsel engagement approval request, in the State field, select **Approved**.

     Note: When the outside counsel engagement request is approved and the details for Legal Tracker is filled and no task created for it, the outside counsel engagement request is automatically submitted for integration.

   - To reject the outside counsel engagement approval request, in the State field, select **Rejected**.

     Note: When the Practice Area lead rejects the request with the details, the record is sent back to the fulfiller. The state of the record is changed to Rejected. The fulfiller must update the record according to the comment provided and again send the request for approval.

3. Select **Save**.
   If you are using the platform view, select **Update**.

Result

Result of approving the outside counsel engagement request

Option to create a task for entering Legal Tracker field details was selected	Legal Tracker details is already filled

On approval of the outside counsel engagement request, a task is created for filling in the Legal Tracker details.	• On approval of the outside counsel engagement request, an integration with Legal Tracker is automatically initiated.
	• On successful integration, the matter created in Legal Tracker will be accessible to the following users with Matter Admin role
	  ○ Matter Owner - User selected as owner of the legal matter.
	  ○ Requested for - User for whom the outside counsel engagement request is submitted.
	  ○ Lead Outside Counsel – User selected as lead outside counsel of the associated Lead firm.
	  ○ Lead company person - User selected as lead of the organization who should coordinate with the outside counsel.

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Result of approving the outside counsel engagement request (continued)

Option to create a task for entering Legal Tracker field details was selected	Legal Tracker details is already filled
	○ #2 company person - User selected as alternative contact person in the absence of the Lead company person. ○ Practice Area leads - One or more users who can approve the Outside Counsel Engagement request.

What to do next

If a task was created to fill in the Legal Tracker details, you need to fill in the details and submit the outside counsel engagement request for integration with Legal Tracker. For more information, see Assign task created for filling Legal Tracker details and Enter Legal Tracker details and submit for integration.

Assign task created for filling Legal Tracker details

As a legal fulfiller, assign the task created for filling Legal Tracker details to the task fulfiller.

About this task

When you submit an outside counsel request, you can choose to fill in the Legal Tracker details later by selecting **Create a task for entering Legal Tracker field details**. On approval of the outside counsel request, a task is created to fill in the Legal Tracker details. Assign this task to the legal user, legal fulfiller or matter fulfiller to fill in the details. For more information on submitting an outside counsel request, see Request Outside Counsel engagement.

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_lg_cf_workspace.legal_workspace_user
- sn_lg_matter.matter_fulfiller
- sn_lg_ops.legal_fulfiller

Procedure

1. Open a task.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the **View All** option on the Matters widget. **c.** From the list, open a legal matter. **d.** Navigate to the Tasks tab. **e.** From the list, open an unassigned task.
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon ( ).

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Method	Action
	c. In the Lists tab, navigate to **Matters** > **All**. **d.** From the list, open a legal matter. **e.** Navigate to Tasks tab. **f.** From the list, open an unassigned task.
Using platform view	**a.** Navigate to **All** > **Legal Matter** > **Matter** > **All** **b.** From the list, open a legal matter. **c.** Navigate to the Tasks related list and open an unas signed task.

2. In the Assigned To field, select the user to whom you want to assign the task.
   By default, the assignment rule OCE Matter task Rule is available that is used to assign a legal task. Review and modify the assignment rule according to your requirement.
3. Select **Save**.

Enter Legal Tracker details and submit for integration

As a task fulfiller, enter the details in the Legal Tracker section of the outside counsel engagement request.

About this task

When you submit an outside counsel request, you can choose to fill in the Legal Tracker details later by selecting **Create a task for entering Legal Tracker field details**. On approval of the outside counsel request, a task is created to fill in the Legal Tracker details. Enter the Legal Tracker details and submit for integration. For more information on submitting an outside counsel request, see Request Outside Counsel engagement.

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_lg_cf_workspace.legal_workspace_user
- sn_lg_matter.matter_fulfiller
- sn_lg_ops.legal_fulfiller

Procedure

1. Open a legal matter task.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Cen ter** **b.** Select the **View All** option on the Matter tasks widget. **c.** From the list, open a legal matter task. **d.** Select the Open Record icon (ⓘ) in the Outside Coun sel Engagement field. **e.** Navigate to the Legal Tracker Details section.

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Method	Action
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon ( ). **c.** In the Lists tab, navigate to **Matter Tasks** > **My Tasks**. **d.** From the list, open a legal matter task. **e.** Select the Open Record icon ( ) in the Outside Counsel Engagement field. **f.** Navigate to the Legal Tracker Details section.
Using platform view	**a.** Navigate to **All** > **Legal Matter** > **Matter Tasks** > **My Tasks** **b.** From the list, open a legal matter task. **c.** Select the Preview this record icon ( ) in the Outside Counsel Engagement field. **d.** Select **Open Record**. **e.** Navigate to Legal Tracker Details related list.

2. Fill in the Legal Tracker details.
3. Select **Save**.
4. Select **Submit for Integration** to create matter in Legal Tracker.
   During the matter creation, errors can be reported for the data related to outside counsel engagement request or Legal Tracker details section or both. For more information, see Resolve errors during matter creation.

Result

On successful integration, access permission is granted to the following users for the matter created in Legal Tracker.

- Matter Owner - User selected as owner of the legal matter.
- Practice Area leads - Users selected as practice area leads for the practice area on the legal matter, to whom the Outside Counsel Engagement request approval is sent.
- Requested for - User for whom the outside counsel engagement request is submitted.
- Lead Outside Counsel – User selected as lead counsel of the associated Lead firm.
- Lead company person - User selected as lead of the organization who should coordinate with the outside counsel.
- #2 company person - User selected as alternative contact person in the absence of the Lead company person.

Resolve errors during matter creation

In the Legal Tracker, a matter is created after outside counsel engagement requests have been approved and an integration initiated.

During the matter creation, errors can be reported for the data related to outside counsel engagement request or Legal Tracker details section or both. You can see the errors in the activity stream of the outside counsel engagement request.

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Workflow when error is reported for outside counsel engagement request details

Legal Tracker details	Workflow
When matter fulfiller fills in the Legal Tracker details	• The outside counsel engagement request is moved to Draft state and the activity stream is updated with the error details. • A notification is sent to the matter fulfiller. • The matter fulfiller corrects the values and submits the request for approval again. • The practice area lead approves outside counsel engagement request. • An integration with Legal Tracker will be automatically initiated.
When a task was created for filling Legal Tracker details	• The outside counsel engagement request is moved to Draft state and the activity stream is updated with the error details. • A notification is sent to the matter fulfiller. • The matter fulfiller corrects the values and submits the request for approval again. • The practice area lead approves outside counsel engagement request. • The matter fulfiller submits the request for integration.

Workflow when error is reported for Legal Tracker details

Legal Tracker details	Workflow
When matter fulfiller fills in the Legal Tracker details	• The outside counsel engagement request is moved to Integration Failed state and the activity stream is updated with the error details. • A notification is sent to the matter fulfiller. • The matter fulfiller corrects the values in Legal Tracker section. • The matter fulfiller submits the request for integration.
When a task was created for filling Legal Tracker details	• The outside counsel engagement request is moved to Integration Failed state and the activity stream is updated with the error details. • A notification is sent to the matter and the task fulfiller.

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Workflow when error is reported for Legal Tracker details (continued)

Legal Tracker details	Workflow
	• The task fulfiller corrects the values in the Legal Tracker section. • The task fulfiller submits the request for integration.

Workflow when error is reported in both outside counsel engagement request and Legal Tracker details

Legal Tracker details	Workflow
When matter fulfiller fills in the Legal Tracker details	• The outside counsel engagement request is moved to Draft state and activity stream is updated with the error details. • A notification is sent to the matter fulfiller. • The matter fulfiller corrects the values and submits the request for approval again. • The practice area lead approves outside counsel engagement request. • An integration with Legal Tracker will be automatically initiated.
When a task was created for filling Legal Tracker details	• The outside counsel engagement request is moved to Draft state and the activity stream is updated with the error details. • A notification is sent to the matter fulfiller. • The legal fulfiller corrects the values and submits the request for approval again. • The practice area lead approves outside counsel engagement request. • The task fulfiller fills in the details for Legal Tracker. • The task fulfiller submits the request for integration.

View external matter details

As a legal fulfiller, view the external matter details fetched from in the legal matter.

Before you begin

Role required: sn_lg_matter.matter_fulfiller, sn_lg_ops.legal_fulfiller

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Procedure

1. Open a legal matter.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select **View All** option on the Matters widget.
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon ( ). **c.** In the Lists tab, navigate to **Matters** > **All**.
Using platform view	**a.** Navigate to **All** > **Legal Matter** > **Matter** > **All** **b.** From the list open a legal matter.

2. Select the **External Matters** tab.
3. Select the Matter ID to view Summary, Spend Information, Firm Details and Other Details.
4. Select link in the Legal Tracker matter link field to open and view the matter in Legal Tracker.

Delete outside counsel engagement request

As a legal fulfiller, you can delete outside counsel engagement request that is no longer required.

Before you begin

Role required: sn_lg_ops.legal_fulfiller, sn_lg_matter.matter_fulfiller

Procedure

1. Open a legal matter.

Method	Action
Using Legal Counsel Center homepage	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the **View All** option on the Matters widget. **c.** From the list, open a legal matter record. **d.** Select the **Outside Counsels** tab.
Using Legal Counsel Center lists	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the list icon ( ). **c.** In the Lists tab, navigate to **Matters** > **All**. **d.** From the list, open a legal matter record. **e.** Select the **Outside Counsels** tab.

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Method	Action
Using platform view	**a.** Navigate to **All** > **Legal Matter** > **Matter** > **All** **b.** From the list, open a legal matter. **c.** Select the **Outside Counsels** related list.

2. Select the check box of the outside counsel engagement request that you want to delete.
3. Select **Remove**.
   If you are in platform view, select **Delete** from the Action on the selected rows drop-down.

Result

Deletion status

Outside counsel engagement request status	External matter created	Deletion
Work in progress and not integrated with Legal Tracker	No	The Outside counsel engagement request is deleted.
Integrated with Legal Tracker	Yes	• The Outside counsel engagement request and the associated external matter are deleted. • The matter created in Legal Tracker is not deleted.

Approve or reject a legal matter or its artifact

Review a legal matter or its artifact's content and approve or reject it.

Before you begin

You must have received an email notification with a link to the legal item for approval.

Role required: none

Procedure

1. Open the approval record from the email notification, Legal Counsel Center, Self-Service, or Employee Center portal.

Options	Steps
From the email notification	Click the link in the email to open the record that needs approval.
From Legal Counsel Center	**Note:** The request_fulfiller role is required to access Legal Counsel Center. **a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center**. **b.** Click the list icon ( ).

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Options	Steps
	c. In the **Lists** tab, under **My Work**, click **Items Pending Approval**. **d.** In the Items Pending Approval list, click a record to open for approval.
From Self-Service	**a.** Navigate to **All** > **Self-Service** > **My Approvals**. **b.** In the My Approvals list, click a record to open for approval.
From Employee Center	**a.** In the Employee Center portal, on the menu bar, click the **My Tasks**. **b.** In the My To-dos list, click a record under the **Open** tab to open for approval.

2. Review the record and either approve or reject:
   - To approve the record, click **Approve**.
   - To reject the record, enter comments for rejection in the **Comments** field and click **Reject**.

Result

The following table shows the result of approve and reject actions on the approval record.

Result of approving or rejecting a legal item

Approve	Reject
• The approval record's state updates from Requested to Approved. If the requested item was assigned to a user group for approval, then the state of the approval records for the remaining users updates from Requested to No Longer Required. **Note:** If the approval was for an attachment of the legal matter artifact, the attachment cannot be deleted from the legal matter artifact. • Any approver who isn't added to **Watch list** in the legal matter would lose access to the approved item.	• The approval record's state updates from Requested to Rejected. If the requested item was assigned to a user group for approval, then the state of the approval records for the remaining users updates from Requested to No Longer Required. • The comments for rejection posted by the approver is added to the legal matter's Activities section. • Any approver who isn't added to **Watch list** in the legal matter would lose access to the approved item.

Communicate using emails from Legal Counsel Center

Compose and send emails directly from legal matter record form in the Legal Counsel Center. You can also save the email as draft to send it later.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

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About this task

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. Click the more actions button () and select **Compose Email**.
   The **Compose Email** button is available only when the legal matter is in the Assigned or Work in progress state.
5. In the **New Email Draft** tab, compose a new email or respond to the email received and send it right away or save it as a draft to send later.
   For more information, see Communicating via email.

Result

After the email is sent, it is added to the activity stream on the legal matter form. Emails you receive from others are also added to the activity stream.
Legal matters marked as Privileged and Confidential, contain confidentiality markers to comply with legal requirements. This applies to both system-generated notifications and fulfiller-initiated outbound emails.

Add a phase to a legal matter

Add a phase to a matter to track specific tasks to complete the matter.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

About this task

If you created a legal matter using a matter template, you might already have the predefined phases in the matter from the template.

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

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Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. To add a phase, in the **Phases** tab, click **New**.
5. In the **Name** field, enter a unique name for the phase.
6. In the **Order** field, enter a number to determine the order in which the phase should be processed.
7. Click **Save**.

Result
A phase is added to the matter.

What to do next
Add tasks in the phase to manage activities in the matter. If the task has to be done by a different user, assign it to them.

Create a task for a legal matter

Create a task in a legal matter or a phase of the matter that you or another user should perform to resolve the matter.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

About this task
As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

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Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. Add tasks to a matter or a phase.
   - To add a task to a matter, in the **Tasks** tab of the Legal Matter form, click **New**.
   - To add a task to a phase, open a phase from the **Phases** tab and click **New** in the **Legal Matter Tasks** tab of the phase record.
5. On the form, fill in the fields.

Legal matter task form

Field	Description
Name	Unique name for the task.
Type	Type of the task.
Priority	Level of priority to work on and complete the task. The priority of a task determines its importance for resolving the matter.
Phase	Phase to which the task belongs.
Matter	Matter to which the task belongs.
Event name	Name of the calendar event associated with the task. A calendar event with a due date helps you to track the progress of the task for specific milestones.
State	Current state of the task to determine the progress of the task.
Order	Order in which the task should be worked on when there are multiple tasks in a phase or matter.
Assignment group	User group to which the task is assigned.
Assigned to	User to whom the task is assigned. If an assignment group is selected, the list shows members of the selected group.
Due date	Date to complete the task.
Short description	Short description to specify the expected activities and output involved in completing the task.

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Field	Description
Notes section	
Additional comments	Comments or notes that the requester can also see.
Work notes	Comments or notes that only authorized users related to the matter can see.
Risk Details - This section appears only when Risk and Mitigation is selected from Type.	
Risk owner	Owner of the risk.
Risk description	Description of the risk.
Proposed mitigation plan	Plan to mitigate the risk.
Action completed	Actions that have been completed.
Interview Details - This section appears only when Interview is selected from Type.	
Start date and time	The date and start time of the interview.
End date and time	The date and end time of the interview.
Interviewee	Name of the person who you are interviewing.
Additional interviewers	Names of the people who conducted the interview.
Interview notes	Notes from the interview.

6. Click **Save**.
7. **Optional:** In the contextual sidebar, add instructions and to-do items for the task.
   - In the **Instructions** section, click **Add** to add instructions for the assigned user to do to complete the task.
   - In the **Checklist** section, click **Create** to add to-do items to track the progress of activities in the matter task.
   - If the matter type is set to Interview, then Interview Template component is visible in contextual sidebar.

   Important: To use interview templates, you must first install the Interview Templates plugin (com.sn_interview_templates) and enable the Requested RCA of Interview Templates for Legal Matter Management and Legal Counsel Center application scope.
8. **Optional:** Add an artifact (folder) in which you or the assigned user can upload files related to the task or its investigation.

Result

A legal matter task is created and is listed in the matter's **Tasks** tab. If the task was added in a phase record, then the task is also listed in the phase's **Legal Matter Tasks** tab.

Tip: If the new task doesn't appear in the list, click the refresh list button ( ).

Complete a legal matter task

When you finish working on an assigned matter task, mark the task as complete.

Before you begin

Role required: sn_lg_ops.legal_user

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Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, under **My Work**, click **Tasks to do**.
4. In the My Tasks list, open the task.
5. **Optional:** In the **Activity** section of the task, enter comments or add attachments.
6. Click **Mark as Complete**.

Result

The matter task is completed and its state updates to Review. It sent to the matter owner for approval.

Approve or reject a legal matter task

As a matter owner, you can review and approve or reject matter tasks that are marked as complete by the task owners.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, under **My Work**, click **Items Pending Approvals**.
4. In the Tasks To Do list, click **Requested** to open a matter task for review for approval.
5. Approve or reject the matter task:
   - To approve the matter task, click **Approve**.

     The state of the approval request updates to Approved.
   - To reject the matter task, click **Reject**. In the dialog box, enter comments for approval or rejection in the **Comments** field.

     The state of the approval request updates to Rejected.

Result

- If you approve the matter task, the task is closed. The state of the task updates to Closed Complete.
- If you reject the matter task, the task is opened again. The state of the task updates to Work in Progress. The task owner can work on the task again to fulfill the requirements of the task and mark it complete for approval.

Cancel a legal matter task

You can cancel a matter task if it no longer requires any action.

Before you begin

You can cancel only tasks that are in any of these states: Draft, Assigned, or Work in Progress.

Role required: sn_lg_ops.legal_user

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Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, under **Legal Matters**, click **Assigned to Me**.
4. In the **Tasks** tab, open the task you want to cancel.

   Note: You can also cancel multiple tasks in one go. Select tasks in the list and click **Cancel Tasks**.

5. In the Legal Matter Task form, click **Cancel**.
6. In the Cancel Task dialog box, enter comments for cancelling the task and click **OK**.

Result
The matter task is cancelled and its state updates to Cancelled.

Create an artifact for a legal matter

Create an artifact for a legal matter to upload and store documents, emails, and files related to the matter.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

About this task
As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Apart from the matter owner, a collaborator or a task fulfiller can also add an artifact to a matter task from the **Tasks** tab.

Note: If any files were attached to the request before it was promoted to a matter, a default artifact containing those files is created in that matter. If the external storage option is enabled, the documents in the artifact created from the requests are shared. So, the addition or deletion of any documents in this shared artifact is reflected in both request and matter. Also, the document permission for this shared artifact is managed at the legal request level and not at the legal matter level.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.

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Option	Steps
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. To add an artifact, in the **Artifacts** tab, click **New**.
5. On the form, fill in the fields.

Artifact form

Field	Description
Number	Unique number of the artifact.
Parent matter	Matter with which the artifact is associated.
Content type	Type of content the artifact can contain, such as emails, documents, or images.
Short description	Short description for the artifact, for example, the name of the artifact.
Description	Detailed description for the artifact, for example, the purpose and content of the artifact.
Notes section	
Work notes	Comments or notes that only authorized users related to the artifact and parent matter can see.

6. Click **Save**.
   The artifact with the specified details is created.
7. In the **External Links** tab, add the path or link to external files..
   a. Click **New** to add a new storage path.
   b. Enter a valid link to the storage folder and a short description.
   c. Click **Save**.
8. **Optional:** Associate the artifact with a matter task.

   Note: If you create an artifact from a matter task, the artifact is associated to the task by default.

   a. In the **Matter Task** tab, select an artifact and click **Add**.
   b. In the Add Legal Task dialog box, select a matter task and click **Add**.
   When the matter owner assigns this task to a group or a user, they get the access to the artifact automatically. Users who can access the artifact are listed in the **Artifact Users** tab.
9. **Optional:** Revoke the access permission of users who were given default access through the associated matter task.
   a. In the **Artifact Users** tab, select one or more users to whom you want to deny access to the artifact.
   b. Click **Revoke permissions**.
   c. Click **Save**.

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What to do next
Attach files to a legal matter artifact.

Attach files to a legal matter artifact

Upload supporting documentation, such as documents, email copies, images, or any other files into the artifact while you are working on a legal matter or matter task. You can also use these artifacts as a reference material to solve similar requests in future.

Before you begin
Role required: sn_lg_matter.matter_fulfiller or sn_lg_ops.legal_user

About this task
As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. In the **Artifacts** tab, open an artifact.
5. **Optional:** Add or remove documents from the legal matter.

Option	Steps
Using the attachment icon	(Optional) The attachment icon appears in the Counsel Assist side bar when the external storage option is not enabled. **a.** In the Counsel Assist sidebar, select the at tachment icon. **b.** In the **Attachments** pane, add, rename, or remove attachments.

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Option	Steps
	▪ To upload a document, select the **Browse** button or the add attachment icon (+) and select a file. **Note:** If there are no attachments, the **Browse** button is available else the add attachment icon + is avail able. ▪ To rename an attached document, select the actions icon (⋮), select **Rename** and update the file name. ▪ To delete an attached document, select the actions icon, select **Remove**. ▪ To download an attached document, se lect the actions icon, select **Download**.
Using the Documents tab	(Optional) The **Documents** tab in the Artifacts form appears when the external storage op tion is enabled. ○ Upload a new document. **a.** In the **Documents** tab, select **Attach** and select a file. **b.** On the New Document form, select **At tach file** link and select a file. **c.** Select **Save**. In the **Documents** tab, a link to the docu ment is listed in the **External URL** column of the documents list. ○ Remove an attached document. **a.** In the **Documents** tab, select a document from the list that you want to delete. **b.** Select **Delete**. Access to these documents to various users is controlled in multiple ways. For more information on managing document access, see Document access in a legal matter.

Document access in a legal matter

Documents attached to legal matters are uploaded to the configured external storage system when the external storage option is enabled on an intake form with All or matter type selected. The access permission of these documents to various personas is controlled in real time, via a scheduled job, or on-demand.

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Document access in legal matters for various personas

The following table shows the type of access to documents and when it is granted to various personas.

Document access in a legal matter

Persona	Access type	Access level	When
Requester, requested for	Read only	Document	Legal matter is submitted
Group manager	Read, Write, Delete	Legal matter	Legal matter is submitted or promoted from legal request
Matter owner (Assigned to)	Read, Write, Delete	Legal matter	Legal matter is assigned
Collaborators	Read, Write, Delete	Legal matter	Added to the **Collaborators** list
Ad hoc approvers	Read only, No delete	Legal matter, artifact, or document based on approval requested	Ad hoc approval is initiated
Matter task owner	Read only, No delete	Artifact	Artifact is associated to a matter task or when a task is assigned to a user
Matter task owner	Read only, No delete	Document in artifact associated with the matter task	Artifact is associated to a matter task or when a task is assigned to a user
Members of assignment group	Depends on the **Assignment group permission** field	Document	Job is run as scheduled, or on-demand
Watch list users	Read only, No delete	Legal matter	Added to the **Watch list**
Delegates	Read only, No delete	Legal matter, artifact, or document based on duties delegated	*`Resolve platform delegation permissions for legal matter`* job is run as scheduled, or on-demand
Delegates through granular delegation	Read only, No delete	Legal matter, artifact, or document based on duties delegated	User is delegated

The scheduled job *`Process External Storage Permissions`* runs at the defined intervals to sync access for all unprocessed permissions on documents for legal matters stored in the external storage.

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Note:

- Requesters can access documents attached to their legal requests from the **Documents** tab on the Standard Ticket page.

  Note: Requesters can delete only those documents from the request that they've attached.

- The matter owner assigned to the legal matter can access documents from the **Documents** tab of the Artifacts record in the Legal Counsel Center.
- Users added to the matter can request on-demand access to documents if they need access before the scheduled job is run.
- The legal admin can revoke a user's access to documents of a legal matter and legal requests.
- Ad hoc approvers lose document access after they approve or reject the requested item.
- Delegates lose access after the delegation period expires.

Request document access for a legal matter

Request access to documents attached to a legal matter that you do not currently have access to.

Before you begin

Role required: sn_lg_ops.legal_user or sn_lg_ops.legal_fulfiller

About this task

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, under **Matters**, click **All**.
4. Open a legal matter for which you want to request document access.
5. In the **Artifacts** tab, open an artifact.
6. In the **Documents** tab, select the documents for which you want access, and click **Request Access**.

Result

The system processes the user's permissions and grants access to the documents in the matter artifact.

Remove document access of users in a legal matter

Remove existing users' access to documents attached to a legal matter's artifact when they are no longer required to view those documents.

Before you begin

Role required: sn_lg_matter.matter_admin

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).

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3. In the **Lists** tab, under **Matters**, click **All**.
4. Open a legal matter for which you want to remove users' access to the documents attached to it.
5. In the **Documents Access** tab, select users for whom you want to remove document access.
6. Click **Remove Access**.

Result
The document access of the selected users is removed, and they're also removed from the list. The user will no longer be able to view the matter's documents.

Add a milestone to a legal matter

Add a milestone to a legal matter to track important calendar events related to the matter.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

About this task
As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

You can track the upcoming milestones in a matter in the **Home** tab of the Legal Counsel Center.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. To add a milestone, in the **Milestones** tab, click **New**.
5. In the **Name** field, enter a unique name for the milestone.
6. In the **Due date** field, select a date by which the milestone should be accomplished.
7. Click **Save**.

Result
A milestone with the specified due date is created.

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Associate related legal requests with a legal matter

Associate one or more legal requests with a legal matter to organize and resolve related requests through a single matter.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

About this task
As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. To associate a legal request, in the **Related Requests** tab, click **Add**.
5. In the Add Legal Request dialog box, select the requests you want to add to the matter and click **Add**.

Note: Any legal request can be associated with a matter including closed or cancelled requests.

Result
The selected legal requests are added to the matter and listed in the **Related Requests** tab.

Associate an existing legal matter with a legal request

Associate an existing legal matter with a legal request that is similar to provide helpful information in resolving the request.

Before you begin
Role required: sn_lg_ops.legal_fulfiller

About this task
As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

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Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. To associate an existing matter, in the **Legal Matters** tab, click **Add**.
5. In the Add Legal Matter dialog box, select a legal matter you want to add to the request and click **Add**.

Result
The selected legal matter is associated with the legal request and shows up in the list in the **Legal Matters** tab.

Disable attorney client privilege for legal matter

Disable privileged and confidential status of a legal matter.

Before you begin
Role required: sn_lg_ops.legal_fulfiller

About this task
As a fulfiller or matter owner, you can disable attorney client privilege on a legal matter to remove privileged and confidential status. The remove action is available only when the matter is in the Assigned or Work in progress state. You can not change the Privileged and Confidential status of matters in Closed Complete, Closed Incomplete, or Cancelled states.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on.

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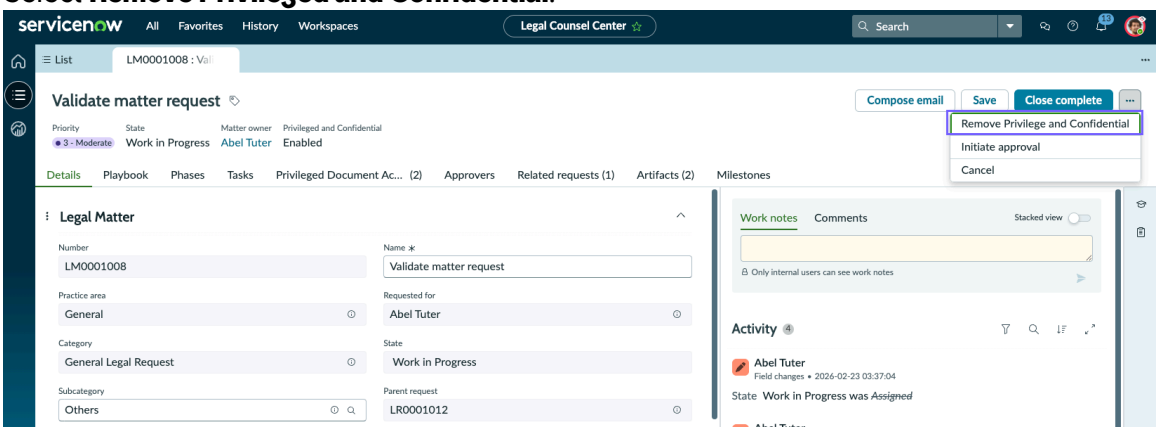
Option	Steps
	c. If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. Disable Privileged and Confidential status.

   a. Click the More actions icon ( ).

   b. Select **Remove Privileged and Confidential**.



   c. In the confirmation modal enter work notes and select **Disable**.

Result

- The Privileged and Confidential status is removed.
- The assignment group permission is retained as it was before removing the privileged and confidential status.
- Privileged and Confidential field in the secondary header is changed to Disabled.
- In the Privileged Document Access tab, the document permissions is reset to Public.
- Stakeholders are notified of the change.

Close a legal matter

Close a legal matter assigned to you when you complete all activities for resolving the legal matter. You can also close the matter if you find that it doesn't need any further action.

Before you begin

Ensure that you've closed all related matter tasks before closing the legal matter.

Note: A legal matter cannot be closed if it has any open ad hoc approval records or for its artifacts.

Role required: sn_lg_matter.matter_fulfiller

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About this task

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. **Optional:** In the **Activity** section, enter comments, add links to related knowledge base articles, or attach files.
5. Click **Close Complete**.
6. In the Close Complete Matter dialog box, enter comments in the **Comments** field. Comments entered in the Close Complete Matter dialog box will be posted in all open related requests.
7. Close related legal requests in the Assigned or Work in Progress states along with the parent request by selecting the **Close related requests** check box.
8. Click **OK**.

Result

- The legal matter is closed and its state updates to Closed Complete.
- If the parent legal request of the matter is not associated with any other open matters, the request is also closed.
- If you chose to also close all related requests, they are also closed if they meet the following conditions:
  - The state is either Assigned or Work in Progress.
  - The requests are not associated with any other open matters.

Reopen a legal matter

If a legal matter requires further investigation after it was closed or canceled, you can reopen it to work on it again.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

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About this task

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. Open the legal matter that you want to reopen.
5. Click **Reopen**.
6. In the Reopen Matter dialog box, enter comments in the **Comments** field to note why you are reopening the matter.
   Comments entered in the Reopen Matter dialog box will be posted in all related requests.
7. Reopen related closed or canceled legal requests along with the parent request by selecting the **Reopen related requests** check box.
8. Click **OK**.

Result

- The legal matter is reopened.
- The state of the matter updates to the state it was in before it was closed or canceled.
- If the primary legal request of the matter is closed or canceled, then the request is reopened.
- If you chose to reopen all related requests also, any related legal requests that are in the Closed Complete, Closed Incomplete, or Cancelled state are also reopened.
- Any collaborators added to the matter will receive an email notification that the matter has been reopened.

What to do next

Work on the legal matter to complete it.

Legal Matter Management reference

Reference topics provide additional information about the lists and forms that you use in Legal Matter Management.

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Components installed with Legal Matter Management

Several types of components are installed with installation of the Legal Matter Management application, including tables, and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles

Roles installed with Legal Matter Management

Role title [name]	Description	Contains roles
Matter Administrator [sn_lg_matter.matter_admin]	Provides the administrative access to legal matters and the underlying data.	• sn_lg_matter.matter_config • sn_lg_matter.matter_manager
Matter Configurator [sn_lg_matter.matter_config]	Provides access to configure data such as practice areas, intake forms, matter templates, and manage record producers through Catalog Builder. It does not provide access to transactional data of legal requests and legal matters.	• catalog_builder_editor • catalog_editor • connection_admin • email_client_quick_message_author • flow_designer • flow_designer_scripting • sla_manager • sn_interview_temp.writer • sn_lg_matter.matter_config_read • sn_templated_snip.template_snippet_write
Matter Configurator Read-only [sn_lg_matter.matter_config_read]	Provides read-only access to legal apps configuration data such as practice areas and matter templates.	sn_lg_ops.legal_user
Matter Fulfiller [sn_lg_matter.matter_fulfiller]	Provides the fulfiller access for working on assigned matters.	• approver_user • email_composer • knowledge • sn_interview_temp.reader • sn_lg_matter.matter_config_read • sn_lg_ops.legal_report_viewer • sn_lg_ops.legal_sla_read • sn_templated_snip.template_snippet_read • task_editor

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Roles installed with Legal Matter Management (continued)

Role title [name]	Description	Contains roles
		• workspace_user • awa_agent **Important:** sn_lg_cf_workspace.legal_workspace_us inherits workspace_user that provides access to the Next Experience Workspace.
Matter Manager [sn_lg_matter.matter_manager]	Provides access to all transactional data of matters and permission to assign matters.	• sn_interview_temp.writer • sn_lg_matter.matter_fulfiller

Tables

Note: In addition to the following tables, tables specific to practice areas are installed with Legal Matter Management. For more information, see Practice area tables for legal matters.

Tables installed with Legal Matter Management

Table	Description
Artifact Content Type [sn_lg_matter_artifact_content_type]	Stores the content type used for categorizing matter artifacts.
Approver Group [sn_lg_matter_m2m_approver_group]	Stores user groups who can approve legal matter templates.
External Storage [sn_lg_matter_artifact_external_storage]	Stores links of external systems such as Microsoft OneDrive or Microsoft SharePoint where matter documents can be stored.
Legal Artifact [sn_lg_matter_artifact]	Stores the artifact details collected for a matter.
Legal Matter [sn_lg_matter_matter]	Stores legal matters.
Legal Matter Core [sn_lg_matter_core]	Stores the core details of a matter.
Legal Matter Phase [sn_lg_matter_phase]	Stores the phases of a matter.

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Tables installed with Legal Matter Management (continued)

Table	Description
Legal Matter Task [sn_lg_matter_task]	Stores the tasks associated to a phase or a matter.
Matter Task Artifact [sn_lg_matter_m2m_matter_task_artifact]	Stores the details of the relationship between an artifact and a matter task.
Matter Task Template [sn_lg_matter_template_task]	Stores the tasks defined in a matter template.
Matter Template [sn_lg_matter_template]	Stores the matter template that defines the default values for a matter. Creating a matter from the matter template populates predefined values in the matter.
Request - Matter m2m [sn_lg_matter_m2m_request_matter]	Stores the details of the relationship between a request and a matter.

Practice area tables for legal matters

Tables specific to practice areas are installed with the Legal Matter Management application.

These practice area tables extend the Legal Matter [sn_lg_matter_matter] table.

If you add columns in a practice area table, you can configure the table to add those columns in the Lists section of Legal Counsel Center. You can also use these tables in other configuration as needed. For more information, see Configure a practice area table.

- Compliance [sn_lg_matter_compliance]
- Corporate Support [sn_lg_matter_corporate_support]
- Crime [sn_lg_matter_crime]
- Digital Forensics [sn_lg_matter_digital_forensics]
- Ethics [sn_lg_matter_ethics]
- General Contract Support [sn_lg_matter_general_contract_support]
- General Legal [sn_lg_matter_general_legal]
- Government Affairs [sn_lg_matter_government_affairs]
- Health, Safety, and Environment [sn_lg_matter_health_safety_and_environment]
- Labor and Employment [sn_lg_matter_labor_and_employment]
- Legal Operations [sn_lg_matter_legal_operations]
- Licensing and Tech Transactions [sn_lg_matter_licensing_and_tech_transactions]
- Litigation [sn_lg_matter_litigation]
- Marketing Support [sn_lg_matter_marketing_support]
- Mergers and Acquisitions [sn_lg_matter_mergers_and_acquisitions]
- Patents, Trademark, and Trade Secrets [sn_lg_matter_patents_trademark_and_trade_secrets]

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- Privacy and Data Security [sn_lg_matter_privacy_and_data_security]
- Procurement Contract Support [sn_lg_matter_procurement_contract_support]
- Real Estate [sn_lg_matter_real_estate]
- Sales Contract Support [sn_lg_matter_sales_contract_support]
- Stock Plan Support [sn_lg_matter_stock_plan_support]

Note: Some of the tables listed before have dedicated workflows, as shown in the following table. To maximize their functionality, install the corresponding workflows.

Practice area table (Legal Matter)	Practice area application/workflow
General Contract Support [sn_lg_matter_general_contract_support]	Legal Simple Contracts
Sales Contract Support [sn_lg_matter_sales_contract_support]	
Digital Forensics [sn_lg_matter_digital_forensics]	Legal Digital Forensics
Ethics [sn_lg_matter_ethics]	Legal Investigations
Marketing Support [sn_lg_matter_marketing_support]	Legal Content Review
Patents, Trademark, and Trade Secrets [sn_lg_matter_patents_trademark_and_trade_secrets]	Legal Simple Intellectual Property
Privacy and Data Security [sn_lg_matter_privacy_and_data_security]	Legal Simple Privacy
Legal hold [sn_lg_matter_legal_hold]	Legal Hold Notification

Legal Tracker Outside Counsel Engagement request form

Fields in the Legal Tracker Outside Counsel Engagement request form of a legal matter.

Refer to the table for the fields on Outside Counsel Engagement form and how they are mapped when we integrate to create a matter in Legal Tracker.

Create Outside Counsel Engagement request

Field	Description	Mapped parameters in Legal Tracker Matters API
Request Details		
Requested for	Name of the user requesting for the Outside Counsel.	None
OCE Number	Unique identifier of the Outside Counsel record.	None

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Create Outside Counsel Engagement request (continued)

Field	Description	Mapped parameters in Legal Tracker Matters API
Reason for engaging an Outside Counsel	Description of the reasons for recruitment of Outside Counsel.	None
Describe the scope of work to be performed	Description of the scope of work to be performed by the outside counsel.	None
Firm Details		
Firm Access	Option to define the firm access to the matter from the drop-down list.	firmAccess
Lead firm	Main firm with which the Outside Counsel is associated.	None
Lead Outside Counsel	Lead counsel of the associated Lead firm.	None
Matter Details		
Full matter name/Parties Involved	Full name of the matter or the parties to be associated with the outside counsel.	fullNameAndPartiesInvolved
Short matter name	Short name of the matter to be associated with the outside counsel.	shortName
Lead company person	Lead of the organization who should coordinate with the outside counsel.	leadCompanyPersonEmail
#2 company person	Alternative contact person in the absence of the Lead company person.	numberTwoCompanyPersonEmail
Matter description	Detailed description of the matter.	description
Start date	Start date for the Outside Counsel. This date must be ahead of today's date.	startDate
Fee arrangement	Type of fees to be selected from the drop-down list.	leadFirmFeeArrangement
Amount	Amount to be provided to the outside counsel according to the fee arrangement.	None
Legal Tracker Details		
Create a task for entering Legal Tracker field details	Option to select to create a legal matter task and delegate the task to fill in the Legal Tracker Details section.	None

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Create Outside Counsel Engagement request (continued)

Field	Description	Mapped parameters in Legal Tracker Matters API
	For more information, see Request Outside Counsel engagement.	
Matter group	Associated matter group of the Outside Counsel record.	matterGroup
Matter type	Associated matter type of the Outside Counsel record.	matterType
Associated matter ID	Associated matter ID of the Outside Counsel.	associatedMatterId
Country	Country of operation of the outside counsel.	countryOrRegion
Practice group	Associated practice group of the outside counsel.	practiceGroup
Organizational unit	Associated organizational unit of the outside counsel.	organizationalUnit
Substantive law	Associated substantive law of the outside counsel.	substantiveLaw
Invoice approval route	Associated invoice approval route of the outside counsel.	invoiceApprovalRoute
AP route	Associated accounts payable route of the outside counsel.	apRoute

Scheduled jobs installed for Legal Tracker

Scheduled jobs that are installed when the Legal Tracker spoke is enabled. These jobs are used to fetch data from Legal Tracker.

Scheduled jobs installed to fetch data from Legal Tracker

Scheduled job	Data synced to the table	Active	Description
Fetch AP Routes Data	Legal Tracker AP Route [sn_lg_matter_legal_tracker_ap_route]	True	Retrieves AP Routes data from the Legal Tracker portal.
Fetch Country Data	Legal Matter Country [sn_lg_matter_legal_matter_country]	True	Retrieves Country data from the Legal Tracker portal.
Fetch Firms Data	Outside Firm [sn_lg_matter_outside_firm]	True	Retrieves Firms data from Legal Tracker portal.
Fetch Matter Financials	Legal Tracker Matter [sn_lg_matter_legal_tracker_matter]	True	Retrieves Matter financial data from the Legal Tracker portal.

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Scheduled jobs installed to fetch data from Legal Tracker (continued)

Scheduled job	Data synced to the table	Active	Description
Fetch Matter Templates Data	Legal Tracker Matter Template [sn_lg_matter_legal_tracker_matter_template]	False	Retrieves Matter Templates data from the Legal Tracker portal.
Fetch Organizational Unit Data	Legal Tracker Organizational Unit [sn_lg_matter_legal_tracker_organizational_unit]	True	Retrieves Organizational Unit data from the Legal Tracker portal.
Fetch Practice Group Data	LegalTracker Practice Group [sn_lg_matter_legal_tracker_practice_group]	True	Retrieves Practice Group data from the Legal Tracker portal.
Fetch Substantive Law Data	Legal Tracker Substantive Law [sn_lg_matter_legal_tracker_substantive_law]	True	Retrieves Substantive Law data from the Legal Tracker portal.

Outside counsel engagement notifications

Notifications are reminders that are created using email templates and sent for outside counsel engagement workflow. Use the notifications received to work on the outside counsel request, tasks and resolve errors.

Outside counsel engagement notification details

Name	Recipient	Tile
Outside Counsel Engagement - Initiated	Practice Area Leads	Outside Counsel Engagement <OCEXXXXXX1> needs your approval
Outside Counsel Engagement - Approved	• Requested For • Legal Matter Owner if different than the Requested For	Your request was approved
Outside Counsel Engagement - Rejected	• Requested For • Legal Matter Owner if different than the Requested For	Your request was rejected

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Outside counsel engagement notification details (continued)

Name	Recipient	Tile
OCE integration with Legal Tracker	• Requested For • Legal Matter Owner if different than the Requested For • Practice Area Leads	Successfully created matter for <OCERXXXX1> in Legal Tracker
OCE Legal Tracker - Error	• Requested For • Legal Matter Owner if different than the Requested For	Failed to create matter for <OCERXXXX1> in the Legal Tracker
OCE - Approver not found	• Legal Administrator • Matter Owner	Outside Counsel Engagement <OCEXXXXXX1> - Initiate approval process failed

Legal Service Delivery Practice Applications

Legal practice applications in the Legal Service Delivery suite provide solutions for the specific needs of different legal practice areas.

Legal Content Review

The ServiceNow® Legal Content Review application enables employees to raise a legal review request of any marketing materials, collaterals, or presentation contents and resolve the issues.

Employees can submit Legal Content Review requests, monitor the progress of the requests, and read related knowledge base articles through a web portal or Virtual Agent. The Legal Content Review request is associated with the Compliance practice area.

Legal teams can collaborate in a centralized Legal Counsel Center to manage legal intake volume, resolve Legal Content Review requests, and monitor work analytics.

Explore



Learn about how employees, paralegal staff, and lawyers use Legal Content Review.

Set up



Set up practice areas, intake forms, and other configurations.

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Request and Manage Legal Content Review request



Submit and track Legal Content Review requests.

Reference



Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Legal Content Review

The Legal Content Review (sn_lg_cont_review) application enables authorized employees in your organization to submit Legal Content Review compliance requests and to track the progress of the request. Users in the legal department who have appropriate roles can work on and resolve these requests.

Features

The features of this application include:

- Submitting Legal Content Review request through a service portal or Virtual Agent
- Managing Legal Content Review requests by resolving the issue or answering queries

Benefits

The benefits of this application include:

- Easily accessed employee self-service that replaces manual, unstructured email processes and tasks
- Automated responses for common legal requests with virtual agents
- A centralized Legal Counsel Center that enables you to track, prioritize, and work on multiple requests concurrently
- Real-time visibility on legal service demands that helps you make meaningful decisions

Configure Legal Content Review

Configure the foundation data to provide Legal Content Review request services to employees who can use these services to submit requests to the legal department.

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As an administrator, review the installed components and modify them or add new ones as applicable.

Create or modify a practice area

Set up the practice areas specific to law practices such as Intellectual Property, Privacy, or Compliance. Associate categories to the practice area and assign a legal department user as the practice area lead.

Create or modify a legal catalog category

Create catalog categories to group legal services that employees can use to find a specific legal service request on the Legal Service Portal.

If you are an existing user and upgrading the application, run the `Fix Content Review Intake Form` fix script to map the new Legal Content Review record producer to the content review category.

Create or modify a record producer for legal services through Classic environment

Create record producers to define the intake forms for Legal Content Review request services. These record producers are available in the Legal Operations service catalog on the Legal Service Portal. Employees can use them to submit legal service requests.

Configure an external storage system for legal requests and legal matters

Configure an external storage system to store documents attached to the Legal Content Review requests by the requester or the fulfiller to enable your organization to have a centralized documentation management and retention policy.

Create or modify a response template for legal services

Configure a response template with a reusable message that legal fulfillers can use to send users quick and consistent messages through work notes, comments, emails, or chat conversations.

Each response template is associated with a table and can be configured to include field variables from that table. You can use a condition builder to specify the conditions that a Legal Content Review request must meet for the template to be usable through the configured channels. For example, you can define a condition to enable response templates only for Legal Content Review requests of type marketing presentation.

For chat response templates, you can specify a short name that can be used as a shortcut to present the response message to a user quickly.

Create an email notification

Create or modify email notifications that are sent when specific events occur for example, when a request is assigned, closed, or canceled, or a message has been posted to request additional information.

Configuring the form layout

To track dispositions from Legal Content Review requests, add the Legal Disposition [sn_lg_ops_legal_disposition] table as a related list to any Legal Content Review Request form. For more information on adding a related list on a form, see Add a related list to a form.

Install Legal Content Review

You can install the Legal Content Review application (sn_lg_cont_review) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Content Review application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Install the Legal Request Management (sn_lg_ops) application before you install Legal Content Review.

Role required: sn_lg_cont_review.admin

About this task

The following items are installed with Legal Content Review:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Content Review application (sn_lg_cont_review) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

Use the Legal Service Delivery Guided Setup to configure the application on your instance.

To access Legal Service Delivery guided setup, navigate to **Legal Administration** > **Legal Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Reconfigure forms to use new components

As an administrator, after installing Legal Content Review reconfigure forms to use the new content review record producer, catalog category, and content taxonomy.

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Before you begin
Role required: admin

About this task
The content review request, that was part of Legal Request Management, has been moved to a new application Legal Content Review. With the new application, new content review components are available for Legal Content Review. You can reconfigure the intake forms to use the new content review record producer, catalog category, and content taxonomy depending on the following points.

- If you use the new content review components, you must redo any customizations you made to the previous forms.
- The previous content review components won't be enhanced for new functionalities.

Procedure
1. Reconfigure the **Intake Form Content Review**.
   a. In the navigation filter, enter `sn_lg_ops_category.list`.
   b. From the list, select Legal Content Review.
   c. In the **Request record producer** field, select the Lookup using list icon ( )
   d. If you aren't able to edit the form in the current application scope, select the word **here** in the message at the top of the page.
   e. In the record producers list, select the Show/hide filter icon ( ).
   f. In the **choose field** field, select **Application**.
   g. In the condition field, select **is** if it is not displayed.
   h. Enter Legal Content Review in the text box.
   i. Select the **Run** button.
   j. Select **Content Review** from the list of record producers that belong to the Legal Content Review application.
   k. Select **Update**.
2. Reconfigure the catalog item for Catalog item categories.
   a. In the navigation filter, enter `sc_cat_item_category.list`.
   b. In the Catalog item categories list, locate **Content Review** and select the Preview this record icon ( ).
   c. Select **Open Record**.
   d. In the **Catalog item** field, select the Lookup using list icon ( ).
   If you are unable to edit the record, select **here** in the access message at the top of the form.
   e. In the catalog items list, select the show/hide filter icon ( ).
   f. In the **choose field** field, select **Application**.
   g. In the condition field, select **is** if it is not already displayed.

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h. Enter *Legal Content Review* in the text box.

i. Select the **Run** button.

j. Select **Content Review** from the list of catalog items that belong to the Legal Content Review application.

k. Select **Update**.

3. Reconfigure the catalog item for Connected Content.

a. In the navigation filter, enter `m2m_connected_content.list`.
The Connected Content Catalog Item: Content Review form is displayed.

b. In the **Catalog item** field, select the Lookup using list icon ( ).

c. In the catalog items list, select the show/hide filter icon ( ).

d. In the **choose field** field, select **Application**.

e. In the condition field, select **is** if it is not displayed.

f. Enter Legal Content Review in the text box.

g. Select the **Run** button.

h. Select **Content Review** from the list of record producers that belong to the Legal Content Review application.

i. Select **Update**.

Legal Content Review requests

Legal Content Review is a mechanism to raise a legal review request for any marketing materials, collateral, or presentation contents and seek services from the legal department to resolve the issue and track its status.

When an employee submits a Legal Content Review request, it is automatically assigned to a group or user in the legal department based on assignment rules configured in the intake form of the associated practice area. If the request is assigned to a legal group, the group lead can assign the request to themselves or to any member in the assignment group. You can submit a new request, update or assign an existing request, or even cancel a legal request.

For more information, see Add an intake form to a practice area.

Work on requests assigned to you in the Legal Counsel Center.

Submit a Legal Content Review request

Submit a Legal Content Review request to seek services from the legal department.

Before you begin

Role required: sn_lg_ops.legal_user

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About this task

If you have the Legal Virtual Agent Conversations application installed on your instance, you can also submit a Legal Content Review request through Virtual Agent chat. For more information, see Legal Virtual Agent Conversations.

Procedure

1. Access the Legal Content Review intake form.

Option	Description
Using Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **Legal services** from the header. **c.** Select **Browse Legal services**. **d.** Select **Legal Content Review**.
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**. **c.** Select the expand icon + on **Legal Requests** from the left panel. **d.** Select **Compliance Requests**. **e.** Select **Legal Content Review** from the complete list of compliance requests.

2. On the Content Review form, fill in the fields.
   For more information on the fields, see Legal Content Review form.
3. Select **Submit**.

Result

- A Legal Content Review request is created in the New state.
- The request is assigned to a group or user in the legal department based on the assignment rule set in the associated practice area. For more information, see Assignment rule to automatically assign legal requests or matters.
- If the administrator has configured notifications, you receive notifications about the progress of the request.

Update a Legal Content Review request

Update request details, add comments, or upload documents in a Legal Content Review request you submitted while it is still in the New or Assigned state.

Before you begin

You can modify a Legal Content Review request only if the request is in the New state.

Role required: sn_lg_ops.legal_user

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Procedure

1. Open the Legal Content Review request.

Option	Description
Using Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** from the header.
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **View all requests** from the **My Requests** panel.

2. Open your submitted Legal Content Review request.
   On the Standard Ticket page, review and edit the request details, manage attachments, or cancel the request.
3. Select **Edit Request** from the Actions menu.
4. In the Variables form, modify the request details.
5. Select **Save**.
6. Select **Back** to return to the Standard Ticket page.
   The request is updated with the new information. The changes appear as comments in the Additional Comments section of the request.
7. **Optional:** In the **Activity** tab, provide comments or more information about your request for the request fulfiller.
8. **Optional:** Manage documents supporting your request.

Option	Steps
If the Attachments tab is visible	○ To upload a new document, select the add attachment icon () and select a file. ○ To rename an attached file, select the edit file name icon () and update the file name. ○ To remove an attached file, select the delete icon ().
If the Documents tab is visible	○ To upload a new document, select **Attach** and select a file. A link to the document is listed in the **External URL** column of the documents list. ○ To remove an attached file, select **Delete**. In the Delete document dialog box, select a document from the list, and then select **Delete**.

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9. **Optional:** In the **Approvals** tab, view the approval details associated with the request.

> **Note:** The **Approvals** tab appears only when the Legal Content Review request or its attachment has approval records.

Assign a Legal Content Review request

Assign a Legal Content Review request to yourself or to someone in your assignment group.

Before you begin

Role required: sn_lg_cont_review.content_fulfiller

About this task

When an employee submits a legal request, it's automatically assigned to a group or user in the legal department based on the assignment rules configured for the intake form of the associated practice area. If the request is assigned to a legal group, any member from the group can assign the request to themselves or assign it to another member of the group. For more information, see Assignment rule to automatically assign legal requests or matters.

The Assignment group permission level must be Read or Edit to view or change the permission level of the legal request for the users. By default, the permission level is set to Read. To change it to Edit, first select **Assign to me**.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Legal Requests** field, select **Unassigned**.
4. In the list of unassigned requests, select the request number.
5. Assign the request to yourself by selecting **Assign to me**.
   The fields in the legal request are in read-only mode until it has been assigned to you.
6. **Optional:** Update the **Assignment group permission** to change the permission level of the legal request for the users.
   - **No Access**: Only the practice area lead, group manager, and user in the **Assigned to** field can access the legal request and assign it to one of the members in the assignment group.
   - **Read**: All members from the assignment group can only view the legal request. This option is the default permission level.
   - **Edit**: All members from the assignment group can view and work on the legal request. The **Assigned To** field becomes optional if this option is set.
7. **Optional:** To assign the request to another member, on the **Details** tab, select a user in the **Assigned to** field.
8. To update the request, select **Save**.

Result

The state of the request updates to Assigned.

What to do next

The assigned user can start working on the legal request. For more information, see Work on a legal request.

Cancel a Legal Content Review request

Cancel a Legal Content Review request irrespective of its state.

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Before you begin
Role required: sn_lg_ops.legal_user

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.
2. Select **View all** from the **My Requests** panel.
3. Open your submitted Legal Content Review request.
4. From the Actions menu, select **Cancel Request**.
5. In the Confirm request cancellation dialog box, provide the reason for the cancellation in the **Comments** field.
6. Select **Confirm Cancellation**.
   The request is canceled and the cancellation comments appear in the Additional Comments section of the request.

   Any associated active flows are terminated.

Legal Content Review reference

Reference topics provide additional information about the lists and forms that you use in Legal Content Review.

Components installed with Legal Content Review

Several types of components are installed with activation of the application, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with Legal Content Review

Role title [name]	Description	Contains roles
Content Review Admin [sn_lg_cont_review.admin]	Provides administrative access to the Legal Content Review feature and its underlying data.	sn_lg_cont_review.content_fulfiller
Content Review Fulfiller [sn_lg_cont_review.content_fulfiller]	Provides fulfiller access for working on assigned content review requests.	sn_lg_ops.legal_user

Legal Content Review form

List of fields in the Legal Content Review request in the Legal Service Portal.

Legal Content Review form

Field	Description
Description	Description of the Legal Content Review request.

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Legal Content Review form (continued)

Field	Description
Content owner	The owner of the Legal Content Review request.
Content type	Select from the list of content type from the drop-down list.
Content link	Provide any link to the content, if available.
Purpose	Purpose of the Legal Content Review request.
Requested approval date	Approval date for the Legal Content Review request.
Add attachments	Attachments to add to the request.

Legal Digital Forensics

The ServiceNow® Legal Digital Forensics application enables you to handle digital forensics requests for data discovery related to custodial and non-custodial data sources that are subject to investigations or litigation.

Explore



Learn about how employees, paralegal staff, and lawyers use Legal Digital Forensics.

Set up



Set up data sources, their fulfillment instructions, and a checklist.

Request



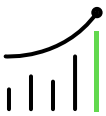
Submit and track digital forensics requests.

Manage



Manage digital forensics requests for data sources subject to investigation or litigation.

Analytics and Reporting



Coordinate work and improve processes with preconfigured dashboards.

Reference



Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

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Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Legal Digital Forensics

Legal Digital Forensics enables different departments in your organization to submit legal requests for discovery and processing of digital data of employees suspected of malicious activity or litigation.

Features

- Intake form to gather request background, custodial and non-custodial data sources with keywords and filter dates.
- Flagging of e-discovery data sources with instructions for data processing.
- Integrated privacy approval flow to get the required approvals before starting the investigation.
- Pre-defined standard digital forensic tasks using a template.
- Record and audit trail of all activities done in support of the investigation and litigation.

You can submit a digital forensics request for the following actions for custodial and non-custodial data on the specified data sources:

- Preserve: Option for preserving relevant digital information of custodial and non-custodial data and documenting the facts.
- Collect: Option for collecting digital information of custodial and non-custodial data that may be relevant to the investigation. Collection might involve activities such as imaging storage devices, or copying or printing of the digital information.
- Review: Option for an in-depth, systematic search of facts in the collected information related to the investigation.
- Present: Option for presenting the relevant information of custodial and non-custodial data in an appropriate format to stakeholders.

After the required privacy approvals for investigation, the digital forensics team member working on the digital forensic request can promote it to a legal matter. The legal matter for the digital forensics request can have phases based on the requested actions. Each phase can have tasks for each custodial or non-custodial data for a keyword, data source, and date range.

Configure Legal Digital Forensics

Configure the foundation data required for managing the digital forensics requests.

As an administrator, you can review the installed components and modify them or add new ones as applicable.

- Configure a data source for digital forensics
- Add fulfillment instructions and checklist for a data source

Install Legal Digital Forensics

You can install the Legal Digital Forensics application (sn_lg_forensics) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Digital Forensics application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Legal Digital Forensics:

- Roles
- Tables

For more information, see Components installed with Legal Digital Forensics.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Digital Forensics application (sn_lg_forensics) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Digital Forensics.
4. Select **Install**.

Configure a data source for digital forensics

Configure a data source a requester can select in a digital forensics request as the source of potentially evidential data.

Before you begin

Role required: sn_lg_forensics.forensics_config or admin

Procedure

1. Navigate to **All** > **Legal Administration** > **Digital Forensics Admin** > **Data Sources**.
2. Create or modify a data source.
   - To create a data source, click **New**.
   - To modify an existing data source, open the data source from the list.
3. On the form, fill in the fields.

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Data Source form

Field	Description
Source	Name of the data source.
Active	Option for marking the data source active. Only active data sources are available on the digital forensics request intake form in the Legal Service Portal.
Source detail fields	Fields that are applicable for the data source. The selected fields appear on the data source details form in a digital forensics request matter. Task owners provide details in these fields based on the fulfillment activities done by them. For more information, see Create a task for a digital forensic legal matter. The field options in the list are populated from the Data Source Detail [sn_lg_forensics_search_source_detail] table.

4. Save the data source.
   - Save a new data source by clicking **Submit**.
   - Save the changes to an existing data source by clicking **Update**.

What to do next

Add fulfillment instructions and checklist for a data source. When a matter owner creates a task for the source in a legal matter, these instructions are pre-populated in the task. The users to whom the legal matter task is assigned can follow these instructions to resolve the task.

Add fulfillment instructions and checklist for a data source

Add instructions for a data source that a task owner in a legal matter can follow to resolve the task.

Before you begin

Role required: sn_lg_forensics.forensics_config or admin

Procedure

1. Navigate to **All** > **Legal Administration** > **Digital Forensics Admin** > **Data Sources**.
2. Open a data source to which you want to add instructions.
3. In the Fulfillment Steps related list, click **New**.
4. On the form, fill in the fields.

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Fulfillment Steps form

Field	Description
Phase	Name of the phase in which the task is created in a legal matter for a digital forensics request.
Search source	Name of the data source for which you are adding the instructions.
Instructions	Instructions for the assigned user to perform to resolve the legal matter task.

5. Click **Submit**.
   A fulfillment step record is created. The **Checklist** section appears.
6. **Optional:** Add to-do items in the **Checklist** section to provide a list of activities for the task fulfiller.
   a. Click the more actions icon ( ) next to the **Checklist**.
   b. Click **Create new**.
   c. Enter a description for the to-do item and press the Enter key.
   This checklist appears as the default to-do items in the corresponding legal matter task.
7. Click **Update**.

Submitting digital forensics requests

Employees from different departments in your organization can submit legal requests for discovery and processing of digital data of employees suspected of malicious activity or litigation.

Submit a digital forensic request

Submit a legal request to access data of current or former employees for internal investigation or litigation reasons.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you are using Legal Service Portal, you can submit a legal request by navigating to the Legal Service Portal portal and selecting a request from the **Service Catalog**.

2. Select **Legal services** from the header.
3. Select **Browse Legal services**.
4. Search for the digital forensic request item.
5. Click **Digital Forensic Request**.
6. On the form, fill in the fields.

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Digital Forensic Request intake form

Field	Description
Add this request to	Option to associate the legal request with an existing legal matter or to a new legal matter. ○ **Existing matter**: Option to associate the legal request with an existing legal matter. Only current legal matters that you have permission to access appear in the list. ○ **New matter**: Option to create a new legal matter and associate the legal request with it.
Existing matter	List of existing legal matters to associate with the legal request. Only current legal matters that you have permission to access appear in the list. This field appears only when the **Existing matter** option is selected.
Name of new matter	Name of the new legal matter. This field appears only when the **New matter** option is selected.
Activity request	Short description of the request.
Detailed description	Detail information of the request, for example, details of the suspicious activities by the custodians or details of the litigation.
Custodial data	Employees on whose data you are requesting the investigation. Also provide other investigation details for a custodian—search keywords, data sources, and search period. For more information, see Add a custodian to a digital forensic request.
Non-custodial data	Resources and assets, such as server, laptop, mobile, or cloud storage, on which you are requesting the investigation. Also provide other investigation details for a non-custodian—search keywords, data sources, and search period. For more information, see Add a non-custodial data to a digital forensic request.
Bulk upload	Export multiple custodian and non-custodial data from a file. For more information on uploading the data from a file, see Add custodial and non-custodial data from a file.
Activities requested	Type of actions required on the data for the investigation.

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Field	Description
	○ Preserve: Secure the original data from the source devices in compliance with departmental guidelines to protect and preserve the evidence. ○ Collect: Acquire the digital evidence that may be relevant to the investigation. Collection might involve activities such as imaging storage devices, or copying or printing of the digital information. ○ Review: Conduct an in-depth, systematic examination of the facts in the collected digital evidence related to the investigation. ○ Present: Document and present the relevant information and findings of the examination in an appropriate format to stakeholders.
Third party reference ID	Reference to a legal matter ID stored in your other matter management system.
Third party reference system	Reference to your other matter management system.
Preferred completion date and time	Date by which the investigation must be complete. The date and time is based on the time zone you are in while requesting.

7. Click **Submit**.

Result

- A digital forensic request is created in the New state.
- The Standard Ticket page displays that has the following tabs to perform different tasks:
  - Activity: Track the activity history of the request and post messages for the fulfiller working on the request.
  - Attachments or Documents: Upload and manage the documents in the legal request.

    Note: If the external storage option is enabled, the **Documents** tab is displayed. Otherwise, the **Attachments** tab is displayed.

  - Custodial data: View existing custodial details. You can also export the data to a file.
  - Non-custodial data: View existing non-custodial details. You can also export the data to a file.
  - Request Details: Review request details.
- If you uploaded custodial and non-custodial data from an Excel or CSV file, the file is attached as a reference document to the request.

  The number of records successfully uploaded from the file into the request is posted as additional comments in the Activity tab on the Standard Ticket page.

  If a record from the file isn't added to the request, an error log file is added in the Activity tab. You can review the reason for failure in the error log file, fix the errors in your file, and upload it again by editing the request.

- For each custodian added in the request, a record is created in the Custodial Data [sn_lg_forensics_custodial_data] table. If a legal profile record for each custodian is not

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already present in the Legal Profile [sn_lg_ops_legal_profile] table, a corresponding record is created.

- For each non-custodial data added in the request, a record is created in the Non Custodial Data [sn_lg_forensics_non_custodial_data] table.

What to do next

On the Standard Ticket page, you can update request details, add comments, manage custodial and non-custodial data, upload supporting documents, or cancel the request. For more information, see Update a submitted digital forensic request.

Any member from the digital forensic team can triage and assign the request to themselves or to any other member in the group. Once the request is assigned, an approval flow is triggered. The flow creates an approval record for each custodial and non-custodial added in the digital forensic request. These approval records are assigned to the privacy team in the legal department. Any member from the legal privacy team can approve the request. After the approval, a digital forensic team member to whom the legal request is assigned can start working on the request. For more information, see Work on a digital forensic request.

Note:

The approval details appear under the **Approvals** tab on the Standard Ticket page.

Add a custodian to a digital forensic request

Add a custodian and related data source details in your digital forensic request.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. On the Digital Forensic Request intake form, in the Custodial data section, click **Add**.
2. On the Add Row dialog box, fill in the fields.

Add a custodian in a digital forensic request

Field	Description
Custodian name	Name of the custodian on whose digital assets you are requesting a digital forensic investigation.
Data source	Source (hardware or software) from which the data for investigation is to be collected.
Other data sources	Source (hardware or software), not listed in the **Data source** field, from which the data for investigation is to be collected. This field appears only when **Other** is selected from **Data source**.
Keywords	Terms to look for within the data collected from the custodian data sources. You can provide multiple search terms each separated by a comma.

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Field	Description
Filter start date	Start date of the digital forensics investigation period. The digital forensic team member would check for the search terms in the data from this date onwards.
Filter end date	End date of the digital forensics investigation period. The digital forensic team member would check for the search terms in the data until this date.
Additional information	Additional details about the custodial data that would be helpful in resolving the request.

3. Click **Add**.
   The custodian record appears in the Custodial data list on the Digital Forensic Request intake form.

Add a non-custodial data to a digital forensic request

Add a non-custodial data and related search source details in your digital forensic request.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. On the Digital Forensic Request intake form, in the Non-custodial data section, click **Add**.
2. On the Add Row dialog box, fill in the fields.

Add a non-custodial data in a digital forensic request

Field	Description
Non-custodial details	Details of the non-custodial data on which you are requesting a digital forensic investigation. For example, you can enter details such as model number, serial number, or product name of the non-custodial data.
Data source	Source from which the data for investigation is to be collected.
Other data sources	Source (hardware or software), not listed in the **Data source** field, from which the data for investigation is to be collected. This field appears only when **Other** is selected from **Data source**.
Search location/File path	Location of the folder or file from where the data for investigation is to be collected. For example, a URL on a cloud storage or a folder or file in a system.
Keywords	Terms to look for within the data collected from the data sources.

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Field	Description
	You can provide multiple search terms each separated by a comma.
Filter start date	Start date of the digital forensics investigation period. The digital forensic team member would check for the search terms in the data from this date onwards.
Filter end date	End date of the digital forensics investigation period. The digital forensic team member would check for the search terms in the data until this date.
Additional information	Additional details about the non-custodial data that would be helpful in resolving the request.

3. Click **Add**.
   The non-custodial record appears in the Non-custodial data list on the Digital Forensic Request intake form.

Add custodial and non-custodial data from a file

Upload a Microsoft Excel or CSV file containing custodial and non-custodial data to quickly add multiple records in a digital forensic request in one go.

Before you begin
Role required: sn_lg_ops.legal_user

About this task
Use a file with a predefined format available on the digital forensics request page to upload custodial and non-custodial data.

Procedure
1. Download the template file with the predefined columns and add custodial and non-custodial details.

   a. Click the **Download an upload template here** link to download the Excel file template.
      The template file contains sample records for custodial and non-custodial data. During import, the columns marked as Not applicable in the file are ignored.

   b. Review the sample data in the downloaded Excel file and add custodial and non-custodial details in the same format, and then save.

2. On the Digital Forensic Request intake form, in the Bulk Upload section, click **Upload**.
3. Browse and select the Excel file containing the custodial and non-custodial data.
   The file is attached to the request. The data from the file is uploaded into the request when you submit the request.

Update a submitted digital forensic request

Update the request details, add comments, manage custodial and non-custodial data, or upload documents in a digital forensic request you submitted while it is still in the New state. You can cancel a submitted request irrespective of its state.

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Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **Legal services** from the header.
3. Select **My Requests** from the header.
4. Open your submitted digital forensic request from the list.
5. On the Standard Ticket page, review and edit the request details or cancel the request.

Action	Steps
Edit request details	**Note:** This option is available if the request is in the New state. **a.** From the Actions menu, select **Edit Request**. **b.** In the Variables form, complete any of the following actions: ▪ To modify the request details, update fields as needed. ▪ To add custodial data, click **Add**. For more information, see Add a custodian to a digital forensic request. ▪ To remove all custodial data, click **Remove All**. ▪ To add non-custodial data, click **Add**. For more information, see Add a custodian to a digital forensic request. ▪ To remove all non-custodial data, click **Remove All**. ▪ To add multiple custodial or non-custodial data from a file in one go, click **Upload**. For more information, see Add custodial and non-custodial data from a file. . **c.** Click **Save**. **d.** Click **Back** to return to the Standard Ticket page. The digital forensic request is updated with the new information. The changes appear as comments in the Additional Comments section of the request.
Cancel the request	**a.** From the Actions menu, select **Cancel Request**. **b.** In the Confirm request cancellation dialog box, provide the rea son of cancellation in the **Comments** field and click **Confirm Cancellation**. The request is canceled and the cancellation comments appear in the Additional Comments section of the request.

6. **Optional:** In the **Activity** tab, provide comments supporting your request.
7. **Optional:** Manage documents supporting your request.

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Option	Steps
If the Attachments tab is visible	○ To upload a new document, select the add attachment icon () and select a file. ○ To rename an attached file, select the ed it file name icon () and update the file name. ○ To remove an attached file, select the delete icon ().
If the Documents tab is visible	○ To upload a new document, select **Attach** and select a file. A link to the document is listed in the **Exter nal URL** column of the documents list. ○ To remove an attached file, select **Delete**. In the Delete document dialog box, select a document from the list, and then select **Delete**.

8. **Optional:** In the **Custodial Data** tab, view the existing custodians added to the request or export to a file by clicking the more options icon ().
9. **Optional:** In the **Non-Custodial Data** tab, view the existing non-custodial data added to the request or export to a file by clicking the more options icon ().

Managing digital forensics requests

As a member of the legal department, work on the digital forensics requests for data discovery related to custodial and non-custodial data sources that are subject to investigations or litigation.

Use the Legal Counsel Center to manage digital forensics requests.

Work on a digital forensic request

As a member of the digital forensic team, you work on a legal request to investigate and resolve the request.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ().
3. In the **Lists** tab, under **Legal Requests**, click **All**.
   If you are a collaborator to a legal request, you can open your assigned collaborations from **Collaborations** under **Legal Request**.
4. Open a digital forensic request to work on.

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- If the legal request is unassigned, click **Assign to me** to assign it to yourself. To assign to another member, select the member's name in the **Assigned to** field and click **Save**.

  The state of the legal request updates to Assigned. If the *Digital Forensics - Privacy Approval* flow is active, an approval flow is triggered. For each custodial and non-custodial data in the digital forensic request, one corresponding approval record is created and is assigned to each member in the legal privacy group. Any member from the legal privacy group can review and approve or reject these approval records.

  The status of custodial and non-custodial data updates to Pending Approval. You can review the status of the approval records in the **Approvers** tab.

- If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

  The collaborators are notified via email that they have been added as collaborators to a legal request.

  Note: The collaborators get the same degree of access as you to work on the legal request, but they can't modify the **Assigned to**, **Assignment group**, and **Assignment group permission** fields.

- In the **Custodial Data** and **Non-custodial Data**, you can add new custodial and non-custodial data by clicking **New** and filling the details. For these newly added custodial and non-custodial records, the approval flow is triggered, which creates approval records and assigns them to each member of the legal privacy group.

  Note:

  The approval details appear under the **Approvals** tab on the Standard Ticket page.

- After getting approvals, promote the approved custodial data in the **Custodial Data** tab and the approved non-custodial data in the **Non-custodial Data** tab to a new or existing legal matter.
  - To promote them to a new legal matter, select them and click **Create Matter**. You can choose to create the matter using a digital forensic matter template to populate the matter with predefined phases and tasks.
  - To promote them to an existing legal matter, select them and click **Add to an Existing Matter**. In the Add to Existing Matter dialog box, select a matter from the list, and click **OK**.

  For more information, see Promote a legal request to a legal matter.

  Note: You can promote the legal request to a legal matter only if you have installed Legal Matter Management and set the record producer type in the associated intake form as **Request and Matter**.

  The legal matter to which the custodial and non-custodial data records are promoted appears in the **Legal Matters** tab.

- Associate other related legal matters to the legal request. In the **Legal Matters** tab, click **Add** and select the legal matter to associate.
- Remove a legal matter from the legal request if the legal matter is not required to be tracked for the request. In the **Legal Matters** tab, select the legal matter to remove, and click **Remove**. If the removed matter is a digital forensic legal matter, all custodial and non-custodial records from the legal matter are also removed. The legal matter owner should cancel the associated phases and tasks from the matter manually.

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- Close the legal request after you complete the required activities to resolve the matter.

  Note: A legal request is automatically closed when it is associated to a legal matter and the matter owner chooses to close the related requests while closing the matter.

- If the request no longer needs any resolution, cancel the request.

  All custodial and non-custodial data records, as well as any pending approval records associated with them, are also cancelled.

Approve or reject the processing of custodial and non-custodial data

Review and approve or reject the processing of a custodial or non-custodial record of a digital forensic request.

Before you begin

Role required: sn_lg_ops.request_fulfiller

About this task

The approval flow for permitting a digital forensic team member to access the custodial or non-custodial data for a digital forensic request is automated through the *Digital Forensics - Privacy Approval* flow. The flow must be in the Published state. The flow is triggered when a digital forensic request is assigned to a digital forensic team member. For each custodial and non-custodial record in the digital forensic request, one corresponding approval record is created and is assigned to each member in the legal privacy group. Any member from the group can review and approve or reject the custodian approval.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **My Work**, click **Items Pending Approval**.
4. In the Items Pending Approval list, open a request by clicking **Requested** in the **State** column.
5. Review the details of custodial and non-custodial data, and approve or reject the request.
   - To approve, click **Approve**.
   - To reject, click **Reject**.

Result

The following table shows the results of approve and reject actions on the approval request.

Result of approving or rejecting a custodial or non-custodial data

Approve	Reject
• The state of the approval record updates from Requested to Approved. • The status of the custodial record and non-custodial record in the legal request	• The state of the approval record updates from Requested to Rejected. • The status of the custodial record and non-custodial record in the legal request updates from Pending Approval to Rejected. A

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Result of approving or rejecting a custodial or non-custodial data (continued)

Approve	Reject
updates from Pending Approval to Approved. • The state of the legal request updates from Assigned to Work in Progress.	rejected custodian record cannot be moved to a legal matter. • The state of the legal request remains Assigned.

Work on a digital forensic legal matter

Work on a digital forensic legal matter assigned to you to get the requested actions for the custodial and non-custodial data done to resolve the request.

Before you begin

The practice area lead or the group manager would have assigned the legal matter to you to work on.

Role required: sn_lg_matter.matter_fulfiller

About this task

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ( ).
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on. **c.** If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. **Optional:** If you need help from other fulfillers to work on the legal matter, add them in the **Collaborators** field.

   Note: Users with the matter_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal matter.
5. **Optional:** Add other approved custodians from the associated legal requests.

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a. In the **Custodial Data** tab, click **Add**.

b. In the Add Custodial Data dialog box, select the custodian records you want to add to the matter.
All approved custodians in the associated requests but not already added to the legal matter are listed.

c. Click **Add**.

6. **Optional:** Add new non-custodial data to the matter.

a. In the **Non-custodial Data** tab, click **Add**.

b. In the Add Non-Custodial Data dialog box, select the non-custodial records you want to add to the matter.
All approved non-custodial records in the associated requests but not added earlier to the legal matter are listed.

c. Click **Add**.

d. Click **Save**.

7. **Optional:** Remove any existing custodial or non-custodial data that doesn't need further investigation or was mistakenly added to the matter by selecting the record in the **Custodial Data** tab or **Non-custodial Data** tab and clicking **Remove**.
8. Review the phases and tasks in the respective tabs and, if needed, create more phases and create digital forensic matter tasks to organize the data processing of custodial and non-custodial data.

   Note: The phases and tasks are available in the legal matter only if you created the matter using the digital forensic matter template.

9. Assign tasks to users across various departments in your organization to work on.
   a. In the **Tasks** tab, open the task by clicking the task number.
   b. On the form, fill in the required fields, and click **Save**.
10. Review legal matter tasks to determine if all its required actions are complete and approve or reject the tasks.
11. Update the status of the associated custodial and non-custodial records to complete.
    - In the **Custodial Data** tab, open the custodian record, update its **Status** to **Complete**, and click **Save**.
    - In the **Non-custodial Data** tab, open the non-custodial record, update its **Status** to **Complete**, and click **Save**.
12. **Optional:** Add milestones to keep a track of timelines to complete important tasks.
13. Create artifacts (folders) and upload files into these artifacts to record and store supporting documents within the legal matter.
14. **Optional:** Associate a new legal request with the legal matter to combine multiple legal requests with the same underlying needs into a single matter.

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All custodial and non-custodial data from the selected request are added to the matter and appear in the respective tabs.

15. **Optional:** Associate the matter with another legal request that is similar in nature.
16. Close or cancel the request as appropriate.
    - Close the legal matter after you complete the required actions for all custodial and non-custodial data in the matter. Ensure you've completed the following items before closing the legal matter.
      - Closed all tasks that are complete or canceled that don't need any actions.
      - Updated the status of all custodial and non-custodial data in the legal matter to either Complete or Cancelled, as appropriate.
    - If the matter doesn't need any action, you can cancel it by clicking the more button () and selecting **Cancel**.

      To cancel the requests associated with the matter, select the **Cancel related requests** check box in the Cancel Matter dialog box. These requests are canceled only if they aren't related to any other open matters.
      - If a related request gets canceled, the status of all its open custodial and non-custodial data (status other than Complete) updates to Cancelled.
      - If a related request cannot be canceled, all its open custodial and non-custodial data is removed from the matter. The status of such records updates to Approved.

      When you cancel the matter without opting to cancel related requests, all custodial and non-custodial data, except with the Complete status, are removed from the matter. The status of such records updates to Approved.

Create a task for a digital forensic legal matter

Create a task for a digital forensic legal matter and add instructions and to-do items in a checklist for the task owner to work on.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

About this task

As a collaborator added to a legal matter, you can access and work on the legal matter just as matter owners can. However, you can't modify the **Matter owner**, **Assignment group**, and **Assignment group permission** fields.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. In the Legal Counsel Center tab, select the list icon ().
3. In the **Lists** tab, open a legal matter by selecting an option under **Matters**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a legal matter to work on.

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Option	Steps
	c. If the legal matter is newly assigned to you, select **Start** to start working on it. The state of the legal matter updates to Work in Progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a legal matter to work on.

4. To add a matter task, in the **Tasks** tab, click **New** to add a task.
   The matter task is created and **Artifacts**, **Approvers**, and **Data Source Details** tabs are displayed.
5. On the Task form, add a new data source.

   a. In the **Data Source Details** tab, click **New**.

   b. On the form, fill in the fields.

Data Source Details form

Field	Description
Search source	Source in which the digital evidence is to be investigated. One or more fields appear on the form based on the data source configuration. For more information, see Configure a data source for digital forensics.
Type	Type of data—custodial or non-custodial—to investigate.
Custodial data	User whose data need investigation. The list displays custodians added in the legal matter. This field appears only when **Custodial Data** is selected from **Type**.
Non-custodial data	Details of the non-custodial data to investigate. The list displays non-custodial data added in the legal matter. This field appears only when **Non Custodial Data** is selected from **Type**.

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Field	Description
Hold notice issued	Option for indicating that the custodian has been notified of the legal hold on the data or device.

c. Click **Save**.

A Data Source Detail record for a selected custodial or non-custodial data is added in the matter task. It appears in the **Data Source Details** tab on both the Task form and Matter form.

If there are fulfillment steps associated with the selected data source, they are added in the Task form as well.

6. Go back to the Task form and in the contextual side bar, add instructions and to-do items for the task.
   - In the **Instructions** section, click **Add** to add instructions for the assigned user to do for completing the task.
   - In the **Checklist** section, click **Create** to add to-do items to track the progress of activities in the matter task.
7. **Optional:** Add an artifact (folder) in which you or the assigned person can upload files related to the task or its investigation.
8. In the **Details** tab of the Task form, select a user in the **Assigned to** field to assign the task to work on.

What to do next

The assigned user can work on the matter task by following the instructions and completing the checklist items.

Work on a task for a digital forensic legal matter

Follow the instructions and complete the to-do items in the checklist of a legal matter task assigned to you.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **My Work**, click **Tasks to do**.
4. In the Tasks To Do list, open a task you want to work on and mark as complete.
5. Follow the instructions listed in the **Instructions** section on the form and complete the to-do items in the **Checklist** section.
6. Update the data source details with required information.

   a. In the **Data Source Details** tab, click the value in the **Hold notice issued** column to open the data source details record.

   b. On the Data Source Details form, fill in the required fields.

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Note: The Data Source Details form has a different set of fields as configured in the data source. For more information, see Configure a data source for digital forensics.

c. If you have notified the custodians of their data or device being on legal hold, select **Hold notice issued**.

d. Upload relevant documents from the **Attachments** section.

e. Click **Save**.

7. **Optional:** In the **Activity** section of the task, enter comments or add attachments.
8. Click **Mark as Complete**.

Result

The matter task is completed and sent to the matter owner for approval.

Legal Digital Forensics reference

Reference topics provide additional information about the lists and forms that you use in Legal Digital Forensics.

Components installed with Legal Digital Forensics

Several types of components are installed with activation of the Legal Digital Forensics application, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with Legal Digital Forensics

Role title [name]	Description	Contains roles
Forensics Administrator [sn_lg_forensics.forensics_admin]	Application-specific administrator role for the Legal Digital Forensics app having the administrative access for the app and full access to the underlying data.	• sn_lg_forensics.forensics_config • sn_lg_forensics.forensics_fulfiller
Forensics Configurator [sn_lg_forensics.forensics_config]	Provides access to configure data for the Legal Digital Forensics app such as search sources.	sn_lg_forensics.forensics_fulfiller
Forensics Fulfiller [sn_lg_forensics.forensics_fulfiller]	Provides the fulfiller access for working on assigned digital forensic requests and matters.	sn_lg_ops.legal_user

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Tables

Tables installed with Legal Digital Forensics

Table	Description
Custodial Core [sn_lg_forensics_custodian]	Users from the Legal Profile table that are added in a digital forensics request.
Custodial Data [sn_lg_forensics_custodial_data]	Extends the Custodial Core table and has additional fields to store information of users added in a digital forensics request.
Data Source [sn_lg_forensics_search_source]	Search sources, checklist items, and instructions for the task owners for the resolution of legal requests. You can configure search sources such as Slack, Box, OneDrive, or Microsoft Outlook. Extends the Application File [sys_metadata] table.
Data Source Details [sn_lg_forensics_search_source_detail]	Details recorded for a search source for custodians by the task owner while working on a digital forensics matter task.
Fulfillment Steps [sn_lg_forensics_fulfillment_steps]	Steps required for a task owner to fulfill an assigned digital forensics request. Extends the Application File [sys_metadata] table.
Non Custodial Core [sn_lg_forensics_non_custodial_data]	Extends the Custodial Core table and has additional fields to store information of non-custodial records added in a digital forensics request.

Legal Invention Disclosure

Legal Invention Disclosure is a workflow that enables inventors to disclose their inventions in a structured manner. The application is installed by the Legal Simple Intellectual Property application.

Get started

Explore



Learn about the features and benefits of Legal Invention Disclosure.

Configure



Install and configure Legal Invention Disclosure, set up outside firms and outside counsels, and set up and configure inventor rewards.

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Manage



Use Legal Invention Disclosure to manage patent requests, create related matter, facilitate the application process, and track progress.

Reference



Get details about components such as roles, tables, and forms.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Learn more about how to create your own apps on the developer site.
- Contact Customer Service and Support

Exploring Legal Invention Disclosure

Learn more about Legal Invention Disclosure through a sample workflow and review the benefits it can provide.

Legal Invention Disclosure overview

Legal Invention Disclosure streamlines the process of patent application along with the review process and optional rewards for the inventors. Legal Invention Disclosure is installed when the Legal Simple Intellectual Property plugin is installed.

Legal Invention Disclosure benefits

Legal Invention Disclosure benefits

Benefit	Feature	Users
Structured process to create and submit Legal Invention Disclosure requests.	Create a Legal Invention Disclosure request	sn_lg_ip.patent_fulfiller and sn_lg_ops.legal_user
Optional monetary rewards granted to the inventor at selected stages of the patent application process.	Set up optional inventor rewards in Legal Invention Disclosure	sn_lg_ip.patent_fulfiller
Inclusion of outside counsels to review patent application requests.	Set up Outside Firms for Legal Invention Disclosure	

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Legal Invention Disclosure benefits (continued)

Benefit	Feature	Users
	Set up Outside Counsels for Legal Invention Disclosure	

Legal Invention Disclosure workflow

The Legal Invention Disclosure configuration workflow is as follows:

1. Install the Legal Simple Intellectual Property application to automatically install Legal Invention Disclosure.
2. Set up and add outside firms.
3. Set up and add outside counsels from the respective firms.
4. Enable outside counsel.
5. Set up optional inventor rewards.

The Legal Invention Disclosure task workflow is as follows:

1. Inventor creates and submits a Legal Invention Disclosure request.
2. The patent reviewer or fulfiller reviews the request.
3. If any clarifications are required, the patent reviewer or fulfiller sends the request back to the requester, who updates the request and returns it.
4. The fulfiller either approves the application and initiates the filing process or rejects the application and closes the request.
5. The fulfiller creates a matter from the request or adds the request to an existing matter if a similar request already exists.
6. The fulfiller proceeds with the application. After that, as configured, a reward for the inventor is automatically generated and need to be sent to the payroll to process and send to the inventor.
7. Add an outside counsel to the legal matter and enable the patent fulfiller to communicate with the outside counsel for reviewing and processing the Legal Invention Disclosure requests.
8. The fulfiller emails the details of the request to the outside counsel.
9. The outside counsel reviews the request.
10. The outside counsel, after approval, files an application with the patent authority. If the request is not approved, the outside counsel informs the fulfiller and the fulfiller closes the request.
11. The outside counsel responds to the email and provide the details of the patent filing to the fulfiller. The details will be available for the fulfiller in the activity stream to take necessary actions.
12. The fulfiller updates the legal matter with the patent filing information.
13. A Patent Repository record is automatically generated with the relevant patent filing details.
14. If a reward for the inventor has been set up for this stage, it is automatically generated and sent to the inventor.
15. The patent authority reviews the patent request and the outside counsel informs the fulfiller about the result of the review through email.

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16. If the patent is granted, the fulfiller updates the legal matter with the patent information and closes the request. The Patent Repository record is automatically updated with the information. If the patent application is rejected, the fulfiller closes the request.
17. If a reward for the inventor has been set up for this stage, it is automatically generated and sent to the inventor.

Configure Legal Invention Disclosure

Install Legal Invention Disclosure and configure the requirements to enable efficient processing and tracking of patent requests.

Configuration overview

1. Install the Legal Invention Disclosure application by installing the Legal Simple Intellectual Property application.
2. Set up outside firms to enable the assignment of outside counsels, who can then be associated with and evaluate Legal Invention Disclosure requests.
3. Set up optional inventor rewards to be granted at three stages of applying for and acquiring a patent.

Install Legal Invention Disclosure

You can install the Legal Invention Disclosure application by installing the Legal Simple Intellectual Property (sn_lg_ip) application if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

Role required: admin

About this task

The following items are installed with Legal Invention Disclosure:

- Roles
- Tables

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Simple Intellectual Property application (sn_lg_ip) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

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5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Set up Outside Firms for Legal Invention Disclosure

Configure Outside Firm records to enable the assignment of outside counsels to review and process the patent filing of Legal Invention Disclosure requests.

Before you begin

Role required: sn_lg_matter.matter_config

Procedure

1. Navigate to **All** > **Legal Matter** > **Outside Counsel Setup** > **Setup Outside Firms**.
2. Select **New**.
3. On the form, fill in the fields.

Outside Firm New Record form

Field	Description
Outside Firm Name	Name of the outside firm.
Description	Detailed description about the outside firm.
Office Name	Name of the office of the outside firm.
Street Address	Address of the outside firm.
PO Box number	Post box number of the outside firm.
City	City where the outside firm is located.
State/Province	State or province where the outside firm is located.
Country	Country where the outside firm is located.
Active	Option to make the Outside Firm record active.

4. Select **Submit**.

What to do next

Set up Outside Counsels for Legal Invention Disclosure

Set up Outside Counsels for Legal Invention Disclosure

Create Outside Counsel records to enable outside counsels to work on a Legal Invention Disclosure request.

Before you begin

An Outside Firm record must be active. For more information, see Set up Outside Firms for Legal Invention Disclosure.

Role required: sn_lg_matter.matter_config, sn_lg_matter.matter_fulfiller

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About this task
Setting up an outside counsel can be done either as a fulfiller task or when configuring Legal Invention Disclosure after installation.

Procedure
1. Access the form to create an Outside Counsel record.

Location	Actions
From the Legal Matter module	Navigate to **All** > **Legal Matter** > **Outside Counsel Setup** > **Setup Outside Counsels**.
From Legal Counsel Center	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Select the List icon ( ) from the primary navigation and in the Outside Counsel sec tion of the **Lists** menu, select **All**.

2. Select **New**.
3. On the form, fill in the fields.

Outside counsel form

Field	Description
Outside Firm	Name of the parent firm for the outside counsel from the lookup which were already added.
Outside Counsel Name	Name of the outside counsel.
Outside Counsel Email	Email address of the outside counsel.
Active	Option to make the Outside Counsel record active.

4. Save the Outside Counsel record.
   - On the Outside Counsels New record form, select **Submit**.
   - On the Create New Outside Counsel from the Legal Counsel Center, select **Save**.

Enable Outside Counsel to be added to Legal Invention Disclosure matters
Enable outside counsels to be added to matters related to Legal Invention Disclosure request.

Before you begin
Role required: sn_lg_ip.patent_config, sn_lg_matter.matter_config

Procedure
1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Select **Intellectual Property** from the list.
3. Select **Invention Disclosure** in the **Intake Forms** tab.

   If a message appears about the application scope, select **here** to be able to edit the record.

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4. Select the lock icon in the **Options** field in the Record Producer section.
5. Enter `Enable` in the Select target record field and select **Enable Outside Counsel on Matter** from the list.
6. Select **Update**.

What to do next

Associate an existing Outside Counsel to a legal matter

Set up optional inventor rewards in Legal Invention Disclosure

Set up optional rewards for inventors to be granted at three stages of applying for and acquiring a patent.

Before you begin

You must update the locale settings in the system properties and then configure the system locale currency before configuring the patent rewards. For more information, see Locale settings and Configuring FX Currency global settings.

Role required: sn_lg_ip.patent_config

Procedure

1. Set up a reward cap for the maximum reward amount.
   If there are multiple inventors, the amount is automatically divided equally among them.

   a. Navigate to **All** > **Legal Practice Apps** > **Intellectual Property** > **Patent Reward Caps**.

   b. Select **New**.

   c. On the form, fill in the fields.

   Patent Reward Caps form

Start Date	Date from which the patent reward cap is implemented.
End Date	Date until which the patent reward cap is implemented.
Reward Cap	Maximum limit of the reward amount in system currency.

   d. Select **Submit**.

2. Configure the reward based on the country of residence of the inventor.

   a. Navigate to **All** > **Legal Practice Apps** > **Intellectual Property** > **Patent Rewards per Country**.

   b. Select **New**.

   c. On the form, fill in the fields.

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Patent Rewards Per Countries form

Country	Name of the inventor's country.
From currency	Currency of the selected country.
To currency	The system locale currency.
Country specific reward cap	The maximum limit of the reward amount in the inventor's country's currency and also holds stage wise rewards caps. **Note:** If multiple inventors are associated with the patent request, the reward is automatically split equally among them.
Forex Conversion Rate	Foreign exchange conversion rate of the amount.
Start Date	Date from which the country reward is implemented.
End Date	Date until which the country patent reward is implemented.

3. Determine whether a reward is granted at various stages of the patent application process.

   a. Navigate to **All** > **Legal Practice Apps** > **Intellectual Property** > **Patent Rewards per Country**.

   b. Select the amount in the **Country Specific Reward Cap** column of the new country entry.

   c. On the Stage rewards form, select **New**.

   d. On the form, fill in the fields.

Stage Rewards form

Field	Description
Amount	Amount to be rewarded to the inventor for the selected status.
Patent rewards per country	The country of the inventor to whom the patent is granted. This field is auto-populated.
Application status	The status of the application at which the inventor should be rewarded. The stages of an application at which rewards can be granted are: ▪ Proceed with Application ▪ Patent Filed ▪ Patent Granted

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Using the Legal Invention Disclosure

Legal Invention Disclosure provides a streamlined process for inventors to request an application for a patent and for that request to be reviewed both internally and externally by outside counsels. The application is then submitted to patent authorities. You can choose to reward inventors at selected stages of the application process.

Create a Legal Invention Disclosure request

Create a Legal Invention Disclosure request to provide detailed information about the invention.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Access the Legal Invention Disclosure intake form.
   a. Navigate to **All** > **Employee Center**.
   b. From the **Legal Services** menu, select **Intellectual Property**.
   c. Select **Invention Disclosure Request**.
2. On the Legal Invention Disclosure request form, fill in the fields.
   For a description of the field values, see Legal Invention Disclosure form.
3. **Optional:** Add any attachments with details of the invention to the request, if any.
4. Select **Submit**.

Result

- A Legal Invention Disclosure request is created in the New state.
- A unique request ID is generated.
- The application status in Legal Counsel Center is set to New.
- The request is assigned to a group or user in the legal department based on the assignment rules set in the associated practice area. For more information, see Assignment rule to automatically assign legal requests or matters.
- You will begin receiving notifications about the progress of the request.

Review the Legal Invention Disclosure request

Review a Legal Invention Disclosure request and either approve it to be sent for a patent approval or request clarification from the requester.

Before you begin

Role required: sn_lg_ops.legal_fulfiller, sn_lg_ip.patent_fulfiller

Procedure

1. Navigate to **Workspaces** > **Legal Counsel Center**.
2. Select the List icon () from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**.
3. Select the request to open.
4. Select **Assign to me**.
5. Select **Start Work**.
6. Review the request.

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- If you are satisfied with the information provided, create the related matter. For more information, see Create a matter or add a Legal Invention Disclosure request to an existing matter.
- If you are not satisfied with the information, select **Clarification Required**, fill in the details about the information needed in the Clarification Required dialog box, and select **Submit**.

Result

- An email notification is sent to the requester to update the request.
- The State is updated to Assigned.
- The Application status in Legal Counsel Center is updated to Clarification Required.

Respond to a request for clarification for a Legal Invention Disclosure request

Provide information requested by the patent reviewer or fulfiller to complete a Legal Invention Disclosure request for review.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

If you have submitted a Legal Invention Disclosure with missing or incomplete information, the fulfiller will request clarification and you will receive an email notification.

Procedure

1. Navigate to **All** > **Employee Center**.
2. Select **My Requests**.
3. In the search field, enter the Legal Invention Disclosure request number from the email notification and press Enter.
4. Open the request by selecting the request name.
5. Provide the required information.
   - If you are being asked for clarification of the information you provided, enter the response to the query in the **Type your message here** field and select **Post**.
   - If a field value is incorrect, select **Actions** > **Edit Request** and correct the values in the fields.
6. Select **Submit For Review** to send the request back to the fulfiller with the updated response.

Result

The request is submitted back to the fulfiller for review.

Create a matter or add a Legal Invention Disclosure request to an existing matter

Create a matter from a Legal Invention Disclosure request or add the request to an existing matter to track the details of the complete patent application process if the request is approved for applying for a patent.

Before you begin

A Legal Invention Disclosure request must have been submitted and accepted. For more information, see Create a Legal Invention Disclosure request.

Role required: sn_lg_ops.legal_fulfiller

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Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ) from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**.
3. Select the Legal Invention Disclosure request to open.
4. Select **Assign to me**.
5. Select **Start Work**.
6. Determine whether a similar request has been submitted previously.
   If a similar request has previously been submitted, you can add the current request to the existing matter related to that request.

   a. In the Legal Counsel Center **Search** field, search for a keyword related to the idea in the request.
      Choose a keyword that is as specific as possible to narrow the search results.

   b. In the search results, if there is a related matter, copy its number.

7. Create a matter from the request or add the request to an existing matter.

Request search result	Actions
Request is original	**a.** Select **Create Matter**. **b.** In the Create Matter dialog box, verify that the Invention Disclosure matter template is selected or, if it is not present, select it. **c.** Select **OK**. **Note:** If the request contains multiple ideas in the **Describe the invention** field, consider creating a separate matter for each idea with a unique name and modify the field so that only one idea is in the field for each matter.
Similar request exists	**a.** From the **Create Matter**drop-down list, select **Add to Existing Matter**. **b.** In the Add to an existing matter dialog box, search for and select the matter number. **c.** Select **OK**. If the requester name is different than the requester of the existing matter, the additional requester's details will be added to the existing matter.

Result

A new matter is created from the request or the request is added to an existing matter. The following actions occur:

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- The Legal Invention Disclosure matter window opens with all the request information.
- The State is updated to Work In Progress.
- The Application status is In Patent Application for the new matter or In Review for an existing matter.

Associate an existing Outside Counsel to a legal matter

Add existing outside counsels to a legal matter and enable the patent fulfiller to communicate with the outside counsel for reviewing and processing the Legal Invention Disclosure requests.

Before you begin

The following items must have been created:

- An Outside Firm record. For more information, see Set up Outside Firms for Legal Invention Disclosure.
- An Outside Counsel record. For more information, see Set up Outside Counsels for Legal Invention Disclosure.
- A related legal matter. For more information, see Create a matter or add a Legal Invention Disclosure request to an existing matter.

You must have the invention disclosure request ID and the matter ID.

Role required: admin, sn_lg_ops.request_fulfiller

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ) from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**.
3. Select and open the request.
4. Select the **Legal Matters** tab and open the matter.
5. Select **Assign to me**.
6. Select the **Outside Counsel** tab.
7. Select **Add Outside Counsel**.
8. On the form, fill in the fields.

Create Outside Counsel Engagement form

Outside firm	Name of the parent firm for the outside counsel from the lookup which were already added.
Outside counsel	Name of the outside counsel from the lookup which were already added for the specific outside firm.
State	This field is automatically set to Offline and cannot be modified.
Outside Counsel Email	This field is auto-populated with the email address of the outside counsel.

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9. Select **Save**.
10. **Optional:** Verify that the outside counsel was added by refreshing the Outside Counsel tab.

Proceed with a Legal Invention Disclosure request

Once an application for a Legal Invention Disclosure request is complete and has been approved, approve the application to proceed for review by an outside counsel.

Before you begin

A legal matter related to the request with which an outside counsel is associated must exist.

Role required: sn_lg_ip.patent_fulfiller

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ) from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**.
3. Open the Legal Invention Disclosure request.
4. Select the **Legal Matters** tab.
5. Open the matter associated with the request.
6. Select **Proceed with application**.

Result

A matter task named "Proceed with application" is generated and can be viewed in the Tasks tab. The State is updated to Work in Progress and the Application status is updated to Proceed with application.

If an optional reward to the inventor at the Proceed with application stage has been set up, it is processed and sent to the inventor. When a rewarding task is generated, the task is sent to the patent fulfiller for approval. After the approval, the information is sent to the payroll team for processing the reward.

What to do next

Once you have associated the outside counsel to a legal matter send an email with the matter details to the outside counsel. For more information, see Provide Legal Invention Disclosure request information to an outside counsel.

Provide Legal Invention Disclosure request information to an outside counsel

Provide the information related to a Legal Invention Disclosure request to an outside counsel for review to determine whether to apply for a patent.

Before you begin

A legal matter related to the request with which an outside counsel is associated must exist.

Role required: sn_lg_ip.patent_fulfiller

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ) from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**.
3. Open the Legal Invention Disclosure request.

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4. Select the **Legal Matters** tab.
5. Open the matter associated with the request.
6. Select **Proceed with application**.

   A matter task named "Proceed with application" is generated and can be viewed in the **Tasks** tab. The State is updated to Work in Progress and the Application status is updated to Proceed with application.

   If an optional reward to the inventor at the Proceed with application stage has been set up, it is processed and sent to the inventor.
7. Create a document to provide the application information to outside counsel by selecting **Generate PDF**.
   The complete matter details are captured in the PDF and stored in the **Artifacts** tab. You can also save the PDF to external storage if it is configured.
8. Compose and send an email with the matter PDF to the outside counsel for review.
   a. Select **Compose Email**.
   b. Attach the PDF and any other supporting documents by selecting the associated check boxes and then selecting **Select documents**.
   c. In the email message, verify the outside counsel's email address in the **To** field.
   d. **Optional:** Modify the default text in the **Subject** field.
   e. Select **Send email**.

What to do next

Once you receive the decision from the outside counsel about whether the patent is being filed, finalize the request application process. For more information, see Facilitate the patent review process.

Facilitate the patent review process

Update the tracking information through the final resolution of the patent review process after you receive the resolution of the patent application review by an outside counsel.

Before you begin

An email from outside counsel with the decision on patent filing has been received.

Role required: sn_lg_ip.patent_fulfiller

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Based on the resolution of the patent application review by the outside counsel, either close the request or indicate that the patent was filed.

Outside counsel decision	Actions
Accepted	a. Select the List icon () from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**. b. Open the Legal Invention Disclosure request and select the **Legal Matters** tab.

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Outside counsel decision	Actions
	c. Open the matter associated with the re quest. **d.** Select **Patent filed**. **e.** On the form, provide the reference number, filing date, and title of the application from the outside counsel's email message. **f.** Select **Submit**. ▪ A Patent Repo record to track the details and status of the application is automati cally generated and is accessible on the **Patent repositories** tab. ▪ A new matter task named "Patent filed" is generated and is accessible in the **Tasks** tab. ▪ The legal matter State is updated to Work in Progress and the Application status is updated to Patent filed. ▪ If an optional reward for the inventor at the Patent filed stage has been set up, it is processed and sent to the inventor.
Rejected	**a.** Select the List icon () from the primary navigation and in the Legal Requests sec tion of the **Lists** menu, select **All**. **b.** Open the Legal Invention Disclosure re quest and select the **Legal Matters** tab. **c.** Open the matter associated with the re quest. **d.** Select **Close Complete**. **e.** Provide the reason for the closure in the comment box in the **Close Complete Mat ter** window. **f.** If you want to close all associated requests, select the **Close related requests** check box. **g.** Select **OK**.

3. Once the outside counsel notifies the patent fulfiller about the resolution of the patent application to the patent authorities, either close the request if the patent was rejected or indicate that the patent was granted.

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Outside counsel decision	Actions
Accepted	**a.** Select the List icon ( ) from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**. **b.** Open the Legal Invention Disclosure request and select the **Legal Matters** tab. **c.** Open the matter associated with the request. **d.** Select **Patent granted**. **e.** On the form, provide the patent grant number and issuance date of the application from the outside counsel's email message. **f.** Select **Confirm**. ▪ The Patent Repo record is automatically updated with the additional details and is accessible on the **Patent repositories** tab. ▪ A new matter task named "Patent granted" is generated and is accessible in the **Tasks** tab. ▪ The legal matter State is updated to Work in Progress and the Application status is updated to Patent Granted. ▪ If an optional reward for the inventor at the Patent granted stage has been set up, it is processed and sent to the inventor.
Rejected	**a.** Select the List icon ( ) from the primary navigation and in the Legal Requests section of the **Lists** menu, select **All**. **b.** Open the Legal Invention Disclosure request and select the **Legal Matters** tab. **c.** Open the matter associated with the request. **d.** Select **Close Complete**. **e.** Provide the reason for the closure in the comment box in the **Close Complete Matter** window. **f.** If you want to close all associated requests, select the **Close related requests** check box. **g.** Select **OK**.

4. Approve the pending tasks related to the stages of the application process.

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a. Navigate to **All** > **Legal Counsel Center**.

b. In the **Pending approvals** widget, select the number.

c. Select all the requests in the Approvals section.

d. Select **Approve** for bulk approval of the requests.
In the Task tab, the State of the approved task is updated to Closed Complete.

5. Select **Close Complete** to close the matter.

Legal Invention Disclosure reference

Reference topics provide additional information about the forms that you use in Legal Invention Disclosure.

Components installed with Legal Invention Disclosure

Several types of components are installed with activation of the Legal Invention Disclosure plugin, including tables and user role.

Roles

Roles installed with Legal Invention Disclosure

Role title [name]	Description	Contains roles
Patent Config [sn_lg_ip.patent_config]	Configuration access for working on requests and matters.	sn_lg_ops.legal_user
Legal Fulfiller [sn_lg_ip.patent_fulfiller]	Fulfiller access for working on assigned requests and matters.	• sn_lg_ops.legal_fulfiller • sn_doc.reader

Tables

Tables installed with Legal Invention Disclosure

Table	Description
Patent Repository [sn_lg_ip_patent_repository]	Contains the details of all patents filed for a legal matter.
Patent Rewards Per Country [sn_lg_ip_patent_rewards]	Contains the details of the rewards for different stages of patent filing based on the country of the inventor.
Patent Reward Caps [sn_lg_ip_patent_reward_caps]	Contains the details of the maximum amount to be rewarded to inventora for individual stages of the application process.
Stage Rewards [sn_lg_ip_stage_rewards]	Contains the details of the amounts of rewards for individual stages of the application process for each country.

Legal Invention Disclosure form

List of fields in the Legal Invention Disclosure request in the Legal Service Portal.

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Legal Invention Disclosure form

Field	Description
Requester name	Name of the requester. The name is auto-populated with the current requester name but can be modified if requesting for another user.
Inventors	Names and details of inventors.
What title would you like to use to describe your invention	Title of the invention.
Briefly describe what problem your invention solves	Description of the issue that the invention will help to resolve.
Describe the invention	Detailed description of the invention.
Approximate date of conception of invention	Date when the invention was conceived. The date must be either the current date or earlier.
Invention publicly disclosed?	Indicates whether the invention has been disclosed publicly. If the choice is **Yes**, additional fields request detailed information about the disclosure. • **Invention disclosure method** - How the invention was publicly disclosed. • **First public disclosure date** - Date when the first public disclosure of the invention was made.
Invention was implemented into a customer product or is planned on being implemented into a customer product?	Indicates whether the invention is already used anywhere. If the choice is **Yes**, additional fields request detailed information about the implementation. • **Past or future date of release of the product** - Past or future date when the product releases. • **Specify the name of the product** - Name of the product where the invention is used.

Legal Investigations

The ServiceNow® Legal Investigations application enables Legal departments to accept complaints from a simple intake process through multiple channels. The legal team can organize and conduct detailed legal investigations including interviews, gathering evidence, and preparing final reports along with recommended actions.

Complaints submitted to Legal, such as ethics complaints, can include bribery, financial fraud, insider trading, and other ethical violations. If employees suspect an incident of any of these violations, they can report it with specifics to the Legal department for legal investigations.

Integrate Legal Investigations with ServiceNow® Universal Request and HR Service Delivery Employee Relations apps to provide a seamless experience for employees to submit complaints via your universal request and for legal counsels to work on them, transferring them

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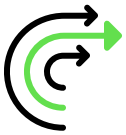
between Legal and HR departments. For more information, see Better together solution: Legal Investigations and HR Service Delivery Employee Relations.

Explore  Learn about how employees, paralegal staff, and lawyers use Legal Investigations.	**Set up**  Set up allegation types and subtypes, and other configurations.	**Request**  Submit and track complaints, such as ethics complaints.
Manage  Manage legal requests and legal matters to investigate and resolve complaints.	**Analytics and Reporting**  Coordinate work and improve processes with preconfigured dashboards.	**Reference**  Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Legal Investigations

Legal Investigations enables the Legal department to accept complaints and conduct detailed legal investigations by conducting interviews, gathering evidence, and preparing final reports and recommended actions.

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Features

- Multi-channel intake process including Legal Service Portal, Employee Center portal, and Anonymous Report Center (ARC) portal.
- Option for submitting anonymous or named complaints.
- Intake form to gather detailed information about the incident, complaint type, involved parties, and incident date.

For interdepartmental transfer of complaints between Legal and HR departments, see Better together solution: Legal Investigations and HR Service Delivery Employee Relations.

Legal Investigations - workflow

The following illustration shows the workflow for submitting and handling complaints.

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Legal Investigations workflow



Better together solution: Legal Investigations and HR Service Delivery Employee Relations

Employees can submit complaints through the Employee Center portal without worrying about who should investigate the complaint. During the triaging or investigation process, fulfillers working on these issues can transfer them back and forth between the Legal and HR departments as necessary for resolution.

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Key features

Using Legal Investigations and HR Service Delivery Employee Relations with Universal Request together for the following key features:

- Omnichannel modes for submitting complaints via Employee Center portal, and Anonymous Report Center (ARC) portal.
- Single triaging queue for all complaints through Universal Request.
- Interdepartmental transfer of basic case details between Legal Service Delivery Legal Investigations and HR Service Delivery Employee Relations.

Setting up Legal Investigations and HR Service Delivery Employee Relations to work together

Complete the following configurations to integrate Legal Investigations with HR Service Delivery Employee Relations.

- Set up Legal Investigations with HR Service Delivery Employee Relations
- Configure Universal Request for legal services

Data mapping

When information related to HR Employee Relations and related legal ethics matters is transferred between HR and the Legal departments, a complete data copy with appropriate data mapping is performed. For the Legal to HR transfer, activate the `HRERDepartmentTransferPostProcessor` script to enable copying. For more information, see Data mapping fields.

To perform additional customizations for deep copying, edit the following scripts:

- Legal to HR: `HRERDepartmentTransferPostProcessor` (Employee Relations scope)
- HR to Legal: `LegalDepartmentTransferPostProcessor` (Legal Investigations scope)

In the **Evidence of type link** table, for a Legal to HR transfer, if external storage is enabled for the legal matter, the artifacts are copied into evidences with the URL field containing the document URL. If external storage is turned off, the matter artifact is copied as an evidence with all the attachments.

If external storage is enabled for the legal matter, all the attachments or documents are copied as evidences with an external documents link. For a Legal to HR transfer, no association exists between the interviews and evidences.

In the **Corrective/Recommended Actions** table, for a Legal to HR transfer, attachments in matter and artifacts linked to the Recommended action task are copied as attachments to the HR Corrective Action. If external storage is enabled for the legal matter, all the attachments or documents are copied as evidences with an external documents link.

Workflow for handling complaints

The following workflow example explains how routing agents, legal fulfillers, and HR agents can use the applications together to resolve complaint requests submitted by employees.

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1. Employees who observe an ethical violation or similar incident report it by submitting a universal request. See Submit a complaint through the Quick Link in Employee Center.
2. A universal request routing agent can triage these complaint requests and create tickets for the appropriate department to work on. See Triaging universal requests for legal investigation complaints.

   Note: When the routing agent creates a legal ticket for complaints from the universal request, an ethics legal matter is created directly to handle and resolve the complaint.

3. The fulfiller from the respective department who is assigned the ticket can work on it and close it, transfer it to another department, or transfer to the universal request. See Work on a legal matter for a complaint.
4. When a ticket is transferred from the Legal department to the HR department, the details in the legal ticket, such as the description, short description, and comments, are copied to the HR Case. The legal ticket is closed, and an HR case is created, which is then handled by an HR agent. See Transfer a legal ticket to another department. Similarly, an HR agent working on an HR case can transfer it to the Legal department, which creates an ethics legal matter.

Configure Legal Investigations

Configure the foundation data required for managing the complaints for legal investigations.

The following components are installed with Legal Investigations:

- Practice area: Ethics
- Category: Ethics Complaints
- Assignment group: Legal — Ethics
- Record producer: Ethics Complaints

  For more information, see Record producers for legal investigations.

- Matter template: Ethics Template

As an administrator, you can review the installed base system components and modify them or add new ones as applicable.

- Configure allegation types and allegation subtypes that will be used by the legal fulfillers when adding new allegations during investigations as needed.
- Add or modify subcategories for the base system Ethics Complaints intake form of the Ethics practice area. These subcategories appear in the **Complaint type** field of the Ethics complaints intake form.
- Enable anonymous complaint submission by completing the following tasks:
  - Install the Anonymous Report Center plugin (com.sn_anonymous_report_center) to enable the Anonymous Reporting Center portal for submitting complaints to Legal.
  - Install the HR Scoped Security plugin (com.snc.hr.scoped_security) to enable the text verification code on the Ethics Complaints intake form on the Anonymous Report Center portal.

    Note: If HR Service Delivery is not installed, you have to modify the permission settings. For more information, see the Anonymous Report Center (ARC) dependency for Legal Services Delivery [KB1171443] article in the Now Support Knowledge Base.

  - Enable the base system Ethics Complaints record producers for legal investigations for ARC.

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- Create a legal matter template to standardize the process of investigating a complaint.
- Configure an interview template for legal matter tasks of type interview to capture consistent information from the interviews. For example, if you set a questionnaire in the template, the assigned task fulfiller can view a list of predefined questions to ask the interviewees.

  For more information, see Interview Management for Employee Relations.

Install Legal Investigations

You can install the Legal Investigations application (sn_lg_investigate) if you have the admin role.The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Investigations application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Legal Investigations:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Legal Investigations.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Investigations application (sn_lg_investigate) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

Configure an allegation type and its subtypes

Configure allegation types and allegation subtypes that the legal fulfillers working on complaints can choose when adding new allegations during investigations.

Before you begin

Role required: sn_lg_investigate.config or admin

Procedure

1. Navigate to **All** > **Legal Administration** > **Legal Investigations Admin** > **Allegation Types**.
2. Configure or modify an allegation type.
   - To configure a new allegation type, click **New**.
   - To modify an existing allegation type, open the allegation type from the list.
3. In the **Name** field, enter a unique name for the allegation type.
4. Select the **Active** option to enable the allegation type.
   Only active allegation types are listed in the **Allegation type** field on the Allegation form of a legal matter.
5. Save the allegation type.
   - Save an allegation type by clicking **Submit**.
   - Save the changes to an existing allegation type by clicking **Update**.

   The Allegation Subtypes related list appears.
6. Configure allegation subtypes for the allegation type.

   Note: You can also configure an allegation subtype by navigating to **All** > **Legal Administration** > **Legal Investigations Admin** > **Allegation Subtypes** > **.**

   a. In the Allegation Subtypes related list, add an allegation subtype by clicking **New** or modify an existing one by selecting from the list.

   #### Allegation Subtype form

Field	Description
Name	Unique name for the allegation subtype.
Allegation type	Parent allegation type.
Active	Option to enable this allegation subtype.

   b. Save the allegation subtype.
   - Save an allegation subtype by clicking **Submit**.
   - Save the changes to an existing allegation subtype by clicking **Update**.

Configure system properties to update ethics complaint assignment group

As an admin, configure the `sn_lg_investigate.ethics_complaints_assignment_group` system property to use a different assignment group to assign ethics complaints.

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Before you begin
Role required: sn_lg_ops.legal_admin

About this task
`sn_lg_investigate.ethics_complaints_assignment_group` is a configurable system property that is used to configure default assignment group for ethics complaints raised using quick links in Employee Center. The sys_id of any group that is protected with the Universal Request sensitive role and has fulfillers who can work on ethics complaints is enabled to configure the system property.

Alternatively, configure the property from Set up Legal Investigations with HR Service Delivery Employee Relations.

Procedure
1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `sn_lg_investigate.ethics_complaints_assignment_group` property.
3. Select the property.
4. If you aren't able to edit the property in the current application scope, select the word **here** in the message at the top of the page.
5. Update the **Value** field with the sys_id of the new assignment group.
6. Select **Update**.

Result
You can now use the new assignment group to assign ethics complaints.

Set up Legal Investigations with HR Service Delivery Employee Relations

Set up Legal Investigations with HR Service Delivery Employee Relations to enable complaint requests to be transferred between Legal and HR departments.

Before you begin
Ensure you have the following ServiceNow® apps installed:

- Legal Investigations (sn_lg_investigate)
- Universal Request (com.snc.universal_request)
- HR Service Delivery Employee Relations (com.sn_hr_employee_relations)

> **Note:** You must approve the requested Restricted Caller Access (RCA) with source scope as Legal Investigations and target scope as Human Resources Employee Relations and Evidence Management.

Optionally, you can install the Anonymous Reporting Center (ARC) plugin (com.sn_anonymous_report_center) to enable transfer of tickets between Legal and Human Resource (HR) departments. ARC requires a HRSD Pro/Enterprise license in addition to the Legal Investigations subscription.

Role required: admin

Procedure
1. Activate the record producers for complaints submission via the **Quick Link** in Employee Center.
   For more information, see Record producers for legal investigations.

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a. Navigate to **All** > **Service Catalog** > **Record Producers**.

b. Search and open record producers with the name **Ethics Complaints**.

c. Verify that **Universal Request [universal_request]** is selected in the **Table name** field. There are two record producer records that enable the ethics complaint submission options: one via the Employee Center portal's **Quick Link** and another via the Anonymous Report Center portal.

d. Select **Active** to activate the record producers for universal requests.

e. Click **Update**.

Note: You must deactivate the record producers mapped to the Ethics [sn_lg_ops_ethics] table.

2. Review the base system assignment group, **Compliance**, to which the ethics complaint requests will be assigned by default, and make the required changes.

a. Navigate to **All** > **User Administration** > **Groups**.

b. Open the assignment group that you want to configure to assign the compliant requests by default.

c. In the Roles related list, verify that the following roles are assigned to the assignment group.

- agent_workspace_user
- sn_uni_req.routing_agent
- interaction_agent

d. In the Group Members related list, add users to triage and work on the submitted complaints. These users must be assigned the sn_uni_req.sensitiveinfo_agent role and the following department-specific roles:

- sn_lg_investigate.fulfiller, for users in the Legal department
- sn_hr_er.case_writer, for users in the HR department

For more information, see Create a user group.

3. If you configured an assignment group other than the base system assignment group, make it the default assignment group for ethics complaint requests by updating the system property.

a. Copy the sys_id of the assignment group configured in the last step.

b. Navigate to **All** > **Legal Administration** > **Legal Investigations Admin** > **Properties**.

c. Paste the sys_id of the assignment group in the **Default assignment group** field.

4. Configure the Universal Request property to determine how the primary ticket should be handled while transferring between the departments.

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a. Navigate to **All** > **Universal Request** > **Administration** > **Properties**.

b. Under **Transfer type**, update the **Select the transfer type to determine how the primary ticket is handled** property (*sn_uni_req.transfer_type*) to **Service**.

Note: If a service isn't selected while transferring the ticket, then the transfer happens to the default service configured for the selected transfer department.

For more information, see Universal Request properties.

5. For Legal to HR complete data copy to execute, activate **HRERDepartmentTransferPostProcessor**.
   a. Navigate to **All** > **System Definition** > **Script Includes**.
   b. Search for the **HRERDepartmentTransferPostProcessor** script include and activate it.
6. If the **Ethics Complaint** quick link is not visible in the **Quick links** section of Employee Center portal, manually run the **addQuickLinkToECPortal** fix script.

Submitting a complaint for investigation

Employees can submit a complaint to report an incident of compliance violation to request an investigation from the Legal or HR department.

You can submit complaints through various channels.

Submit a complaint through Legal Service Portal

Submit a complaint through the Legal Service Portal to report a violation incident for investigation and resolution.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

To submit a complaint anonymously, see Submit a complaint through the Anonymous Report Center portal.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.
2. Search for a legal service request to file a complaint, such as ethics complaint, or click **Service Catalog** to view all available request categories.
3. Select the **Ethics Requests** category from the Categories pane.
4. Click **Ethics Complaints** to submit a request.
5. On the Ethics Complaints form, fill in the fields.
6. To add an involved party, click **Add** in the **Involved Parties** section.
   a. On the Add Row dialog box, fill in the fields.
   For a description of the field values, see Ethics complaints intake form.
   b. Click **Add**.

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The involved party record appears in the Involved Parties list on the Ethics Complaints intake form.

7. Click **Submit**.

Submit a complaint through Employee Center

Submit a complaint through the Employee Center portal to report a compliance violation incident for investigation and resolution.

Before you begin
Role required: sn_lg_ops.legal_user

About this task
To submit a complaint anonymously, see Submit a complaint through the Anonymous Report Center portal.

Procedure

In the Employee Center portal, submit a complaint using either the **Legal** menu or the **Quick links** section.

Submit a complaint through the Legal menu in Employee Center

Submit a complaint through the Legal menu in the Employee Center portal.

Before you begin
Role required: sn_lg_ops.legal_user

About this task
Note: This option is available if the admin has activated the record producer that is mapped to the Ethics [sn_lg_ops_ethics] table. For more information, see Record producers for legal investigations.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center portal, click the **Legal** menu and select the **Ethics and Compliance** option.
3. In the Ethics and Compliance request category page, click **Ethics Complaints**.
4. On the Ethics Complaints form, fill in the fields.
   For a description of the field values, see Ethics complaints intake form.
5. To add an involved party, in the **Involved Parties** section, click **Add**.

   a. In the Add Row dialog box, select an involved party type option to indicate if the involved party is an employee of the organization or a user from outside the organization.

   b. Provide the involved party's name, email id, and other notes.

      Note: For an internal employee, the **Email id** field is auto-populated from the user's profile.

   c. Click **Add**.
      The involved party record appears in the Involved Parties list on the Ethics Complaints intake form.

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Repeat these steps to add more involved parties.

6. On the Ethics Complaints form, click **Submit**.

Result

A legal request is created and assigned to a request fulfiller or an assignment group as configured.

Submit a complaint through the Quick Link in Employee Center

Submit a complaint through the Quick Link in the Employee Center portal.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

Note: This option is available if the admin has activated the record producer that is mapped to the Universal Request [universal_request] table. For more information, see Record producers for legal investigations.

Procedure

1. Navigate to **All** > **Self-Service** > **Employee Center**.
2. In the Employee Center portal, click the **Ethics Complaints** link under the **Quick links** section.
3. On the Ethics Complaints form, provide the summary of the complaint.
4. In the **Detailed description** field, provide the details of the complaint, the names of the people involved, and the approximate date and time of the incident.
5. **Optional:** Click **Add attachments** to upload any documents supporting your complaint.
6. Click **Submit**.

Result

A universal request is created and is assigned to the the assignment group as configured. A universal request routing agent can triage and work on it.

Submit a complaint through the Anonymous Report Center portal

Submit a complaint anonymously through the Anonymous Report Center (ARC) portal to report a compliance violation incident for investigation and resolution.

Before you begin

To file a complaint anonymously, admins must have completed the following tasks:

- Installed the Anonymous Reporting Center plugin (com.sn_anonymous_report_center)
- Enabled the Ethics Complaints record producer for submission through ARC portal.

  For more information, Record producers for legal investigations.

Role required: sn_lg_ops.legal_user

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Procedure

1. Open the Anonymous Report Center portal either via Employee Center portal or using a direct URL.

Option	Steps
From Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** In the Employee Center portal, click the **Legal** menu and select the **Ethics and Compliance** option. **c.** In the Ethics and Compliance request category page, click **Anonymous Ethics Complaint**.
Using direct URL that does not require a log in	Navigate to the Anonymous Report Center by accessing your instance URL and adding a /arc suffix. For example, https://example.com/arc
From Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal**. **b.** In the Legal Service Portal, click **Service Catalog** and select the **Ethics Requests** category. **c.** In the Ethics Requests category page, click **Anonymous Ethics Complaint**.

   If you are using Employee Center or Legal Service Portal, you are signed out of your account to keep your identity anonymous. The Anonymous Report Center portal opens in a new browser tab.
2. In the Anonymous Report Center portal, click **Submit an Anonymous Report**.
3. On the Submit an anonymous report page, click **Ethics Complaints**.
4. On the Ethics Complaints form, fill in the fields.
   Based on the active record producers for ARC, different sets of fields might appear on the Ethics Complaints form.

   For field descriptions, see Ethics complaints intake form in the Anonymous Report Center portal.
5. Enter the text verification code.

   Note: For the text verification code to work, you must install the HR Scoped Security plugin.
6. Click **Submit**.
7. **Optional:** To download and save the reported request on your system, in the Thank you for submitting your report dialog box, click **Download report copy**.
8. Note the report key and report number from the respective fields to access your anonymous report in future to track its progress.

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Result

Either a legal request or a universal request is created based on the active record producers for legal investigations.

To maintain the anonymity of the requester or requested for users, the request is submitted with the following values for the corresponding fields:

- **Opened by** is populated as `Guest`.
- **Requested for** is empty.

Access your anonymous report from the Anonymous Report Center portal

You can follow up on your anonymous report to view comments and updates from the legal fulfiller working on it or add comments.

Before you begin

To access your anonymous report, you must have the report key and report number that was generated when you submitted the request.

Role required: None

Procedure

1. Open the Anonymous Report Center portal either via Employee Center portal or using a direct URL.

Option	Steps
From Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** In the Employee Center portal, click the **Legal** menu and select the **Ethics and Compliance** option. **c.** In the Ethics and Compliance request category page, click **Anonymous Ethics Complaint**.
Using direct URL that does not require a log in	Navigate to the Anonymous Report Center by accessing your instance URL and adding a /arc suffix. For example, https://example.com/arc
From Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal**. **b.** In the Legal Service Portal, click **Service Catalog** and select the **Ethics Requests** category. **c.** In the Ethics Requests category page, click **Anonymous Ethics Complaint**.

   If you are using Employee Center or Legal Service Portal, you are signed out of your account to keep your identity anonymous. The Anonymous Report Center portal opens in a new browser tab.

2. If you're asked to provide credentials to log in, you can copy this URL and enter your instance details to access the Anonymous Report Center.
   For example: https://<instance_name>/arc.

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3. In the Anonymous Report Center portal, click **Follow up on a report**.
4. On the Follow up on a report page, enter the details.
   a. In **Report Key**, enter the report key you get after submitting an anonymous report.
   b. In **Report Number**, enter the report number you get after submitting an anonymous report.
5. Enter the text verification code.

   Note: For the text verification code to work, you must install the HR Scoped Security plugin (com.snc.hr.scoped_security).

6. Click **Next**.
   The report is displayed in the Standard Ticket Page.

Managing complaint requests

As a member of the legal department, work on legal requests for complaints submitted by employees to report non-compliance incidents and conduct legal investigations.

Complaints submitted as legal requests

When an employee submits a legal request related to an ethics complaint, it is automatically assigned to a group or user in the legal department. The assignment is done based on the assignment rules configured in the intake form of the associated practice area. If the request is assigned to a legal group, the group lead can triage the request to themselves or to any member in the assignment group.

Complaints submitted as universal requests

If you've enabled submission of ethics complaints using universal requests, it is assigned to a compliance group. The universal routing agent can then create an ethics legal matter from the universal request that can be then assigned to a matter owner to work on. For more information, see Better together solution: Legal Investigations and HR Service Delivery Employee Relations.

Working on complaints

For the legal investigation to be conducted effectively, the legal fulfillers can evaluate the reported incident in detail to:

- Identify sources for information and evidence
- Add or modify involved parties
- Prepare interview questions to collect key details
- Attach supporting and relevant documentation

Use the Legal Counsel Center to conduct legal investigations into the submitted complaints.

Triaging universal requests for legal investigation complaints

When employees observe and report an ethics violation or similar incident, the resulting universal requests are triaged for prioritization and resolution.

Due to the sensitivity of such cases, you can view and work on these universal requests for complaints based on the roles you've been assigned.

Universal Request routing agent

With the sn_uni_req.sensitiveinfo_agent role for handling sensitive requests, you can review and triage these universal requests.

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Legal fulfiller

With the sn_lg_investigate.fulfiller role, you can create an ethics legal matter from the universal request.

HR agent

With the sn_hr_er.case_writer role, you can create a Report Misconduct HR case from the universal request.

Create an ethics legal matter from a universal request

Create an ethics legal matter from a universal request to get the Legal department's assistance in resolving the complaints.

Before you begin

Ensure you have the Universal Request application installed and related configuration for legal services completed by the administrator.

Role required: sn_lg_investigate.fulfiller and sn_uni_req.sensitiveinfo_agent

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
   Alternatively, you can also open a universal request by navigating to **All** > **Universal Request** > **Open**.
2. Click the list icon ( ).
3. Under the **Ethics Complaints**, click **All**.
4. Open the universal request on which you want to work.
5. Assign the universal request to yourself or to another member from the assigned group.
   - To assign the request to yourself, click **Assign to me**.
   - To assign the request to another member, on the **Details** tab, select a user in the **Assigned to** field and click **Save**.

   The assigned member can start working on the universal request and perform the next steps.
6. Based on the subject of the complaint, you can route it to the appropriate department by creating either an ethics legal matter or an HR case.
   For more information on creating a Report Misconduct HR case, see Using HR Service Delivery Employee Relations.
7. Click **Create Legal Ticket**.
8. In the Create Legal Ticket dialog box, fill in the fields.
   a. From the **Ticket type** list, select **Ethics Complaints**.
   b. In **Additional comments**, enter details about the service and support required from the Legal department.
   c. Click **Create**.

Result

- An ethics legal matter is created and becomes the primary ticket for the universal request. The legal matter number is populated in the **Primary Ticket** field.
- All attachments from the universal request are copied to the legal matter. The ethics complaints legal matter template is applied to this legal matter by default.
- The state of the universal request changes to In Progress.
- The **State reason** field displays with the pre-populated value Primary Ticket - In Progress.

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What to do next

- If an ethics legal matter is created: In the Legal department, the legal matter is assigned to a matter owner. The assigned matter owner works on the legal matter and provides the resolution, or transfers the legal request to another department or back to the universal request.
- If an HR case is created: In the HR department, the HR case is assigned to an HR agent to work on. For more information, see Work an HR case.

Work on a legal request for a complaint

Work on legal requests for complaints assigned to you or as a collaborator to resolve issues or answer queries.

Before you begin

Role required: sn_lg_investigate.fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Open a legal request assigned to you to review and perform tasks.
   - Work on the legal request to verify the complaint details and conduct an initial inquiry.
   - Add or modify an involved party in the **Involved Parties** tab.
   - If the legal request needs thorough investigation, promote it to a legal matter.
   - Either close the request or cancel the legal request.
     - Close the request after you've resolved it.
     - If you identify that the request doesn't need any action, you can cancel it.

Work on a legal matter for a complaint

Work on a legal matter assigned to you to conduct legal investigations and resolve an internal complaint.

Before you begin

The practice area lead or the group manager would have assigned the legal matter to you to work on.

Role required: sn_lg_investigate.fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ().
3. In the **Lists** tab, under **Matters**, click **All**.
4. Open a legal matter to work on.
5. Click **Start Work** to start working on the legal matter.
   The state of the legal matter updates to Work in Progress.
6. During the legal investigation, you can create and record the following information related to the incident and involved parties.
   - Add or modify an involved party in the **Involved Parties** tab.
   - Add an allegation to the matter, and associate it with one or more involved parties of the type Subject of Allegation.

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- Add documentation, interviews, and recommended actions through legal matter tasks as you conduct investigations.

  Note: For a legal investigation matter, add tasks of the following types:

  - **Documentation**: Store documents that you collected as part of the investigations in the legal matter. You can also assign the task of collecting investigation documentation to another user. For detailed instructions, see Add a task in the legal matter.
  - **Interview**: Conduct interviews with the involved parties, and as needed, include other users on the interview panel. For detailed instructions on adding interviews, see Add an interview task to a legal matter.
  - **Recommended Actions**: Based on the findings of the investigations, provide recommendations for the involved parties. For detailed instructions on adding recommended actions, see Add a recommended actions task to a legal matter.

- Perform other general tasks on the legal matter.

7. Close the legal matter or transfer the legal matter based on the requirements.

Add an allegation record and associate it with an involved party

Add an allegation record to the legal matter as part of your complaint investigation, and associate it with an involved party.

Before you begin

Role required: sn_lg_investigate.fulfiller

About this task

You can also associate an allegation with an involved party from the Involved Party form.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Open a legal matter assigned to you in which you want to add an allegation record.
3. In the **Allegations** tab, add or modify an allegation record.
   - To add an allegation record, click **New**.
   - To modify an existing an allegation record, open an allegation record from the list.
4. On the form, fill in the fields.

Allegation form

Field	Description
Allegation type	Type of the allegation.
Allegation subtype	Subtype of the selected allegation type.
Description	Detailed information about the allegation.

5. Save the allegation record.
   - Save an allegation record by clicking **Save**.
   - Save the changes to an existing allegation record by clicking **Update**.

   The **Subjects of Allegation** tab appears.

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6. Associate the allegation to an involved party.

   a. In the **Subjects of Allegation** tab, click **Add**.

   b. On the Add Involved Party dialog box, select an involved party from the list.

      Note: An involved party of type Subject of Allegation can only be associated with an allegation record.

   c. Click **Add**.

   The selected involved party is listed in the **Subjects of Allegation** tab.

Add an interview task to a legal matter

As part of your complaint investigation, add an interview task for the involved parties in the legal investigations matter.

Before you begin

Role required:sn_lg_investigate.fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Open a legal matter assigned to you in which you want to add a legal matter task.
   - To add a task to a matter, in the **Tasks** tab of the Legal Matter form, click **New**.
   - To add a task to a phase, open a phase from the **Phases** tab and click **New** in the **Legal Matter Tasks** tab of the phase record.
3. On the Legal Matter Task form, select **Interview** from the **Type** field.
4. On the form, fill in the fields.
   For field descriptions, see Legal Matter Task form for legal investigations and fields specific to the interview task type.
5. Save the legal matter task.
   - Save a legal matter task by clicking **Save**.
   - Save the changes to an existing legal matter task by clicking **Update**.

Add a recommended actions task to a legal matter

Based on your findings of the complaint investigation, add recommended actions for the involved parties in the legal investigations matter.

Before you begin

Role required: sn_lg_investigate.fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Open a legal matter assigned to you in which you want to add a legal matter task.
   - To add a task to a matter, in the **Tasks** tab of the Legal Matter form, click **New**.
   - To add a task to a phase, open a phase from the **Phases** tab and click **New** in the **Legal Matter Tasks** tab of the phase record.
3. On the Legal Matter Task form, select **Recommended Action** from the **Type** field.

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4. On the form, fill in the fields.
   For field descriptions, see Legal Matter Task form for legal investigations and fields specific to the recommended action task type.
5. Save the legal matter task.
   - Save a legal matter task by clicking **Save**.
   - Save the changes to an existing legal matter task by clicking **Update**.

Manage involved parties in a legal request or legal matter

Add a new involved party or modify the information of an existing involved party in a legal request or legal matter related to a complaint.

Before you begin

Role required: sn_lg_investigate.fulfiller

About this task

Involved parties are individuals who are directly or indirectly connected to a complaint, such as complainants, witnesses, the subjects of allegations, and other relevant individuals. These individuals can be from within or outside the organization.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Open a legal request or legal matter assigned to you in which you want to manage the involved parties.
3. In the **Involved Parties** tab, add or modify an involved party.
   - To add an involved party, click **New**.
   - To modify an existing an involved party, open an involved party from the list.
4. On the form, fill in the fields.
   For field descriptions, see Involved Party form.
5. Click **Save**.

Legal Investigations reference

Reference topics provide additional information about the lists and forms that you use in Legal Investigations.

Components installed with Legal Investigations

Several types of components are installed with activation of the Legal Investigations application, including tables, user roles, and scheduled jobs.

Roles

Roles installed with Legal Investigations

Role title [name]	Description	Contains roles
Investigations Administrator [sn_lg_investigate.admin]	Application-specific administrator role for the Legal Investigations app having the administrative access for the app and full access to the underlying data.	• sn_lg_investigate.config • sn_lg_investigate.fulfiller • sn_interview_temp.admin

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Roles installed with Legal Investigations (continued)

Role title [name]	Description	Contains roles
Investigations Configurator [sn_lg_investigate.config]	Provides access to configure data such as allegation type and subtype. It does not provide access to transactional data of requests and matters.	sn_interview_temp.writer
Investigations Fulfiller [sn_lg_investigate.fulfiller]	Provides the fulfiller access for working on assigned requests and matters.	• sn_lg_ops.legal_user • sn_interview_temp.reader

Tables

Roles installed with Legal Investigations

Table	Description
Allegation [sn_lg_investigate_allegation]	Allegations complained on a person, also known as the subject of allegation.
Allegation Type [sn_lg_investigate_allegation_type]	Type of allegation used to file a complaint, such as financial fraud, discrimination, and harassment.
Allegation Subtype [sn_lg_investigate_allegation_subtype]	Subtype used to further classify an allegation type. For example, financial fraud can have subtypes such as undue favours or bribes.
Involved Party [sn_lg_investigate_involved_party]	Users who are involved in a complaint as a complainant, subject of allegation, witness, or any other type.
Associated Allegation [sn_lg_investigate_m2m_allegation_party]	Association between an allegation and its subjects of allegation. One allegation can be associated with one or more subjects of allegation.

Record producers for legal investigations

A record producer helps you set up an intake form containing fields that a requester has to fill in and initiate a request.

When Legal Investigations is installed, record producers for ethic complaints are installed.

When an employee submits a complaint, a legal request or universal request is created based on the active record producers' mapping to different tables.

Important: At any given time, only one set of record producers mapped to a specific table can be active.

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Legal requests

The following record producers can be activated for creating legal requests when a complaint is submitted.

Note: To submit a legal request via the Anonymous Report Center portal, you require a HRSD Pro/Enterprise license in addition to the Legal Investigations subscription.

Record producers for submitting complaints as legal requests

Record producer name	Mapped table	Description
Ethics Complaints	Ethics [sn_lg_ops_ethics]	• Submitting via Legal Service Portal or via the **Legal** menu option in the Employee Center portal. • Creates a legal request.
Ethics Complaints	Ethics [sn_lg_ops_ethics]	• Submitting via the Anonymous Report Center portal. • Creates a legal request.

Universal requests

The following record producers can be activated for creating universal requests when a complaint is submitted.

Note: These record producers are inactive by default. If you want to integrate Legal Investigations with HR Service Delivery Employee Relations and transfer complaints between the Legal and HR departments, you must activate them.

Record producers for submitting complaints as universal requests

Record producer name	Mapped table	Description
Ethics Complaints	Universal Request [universal_request]	• Submitting via the **Quick Link** option in the Employee Center portal. • Creates a universal request. • Marks the request as a sensitive case by default.
Ethics Complaints	Universal Request [universal_request]	• Submitting via the Anonymous Report Center portal. • Creates a universal request. • Marks the request as a sensitive case by default.

For more information, see Managing record producers for legal services.

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Ethics complaints intake form

Employees can use the Ethics Complaints intake form to report an ethics violation incident.

Ethics Complaints form

Field	Description
Complaint type	Type of complaint or allegation that violated the ethics policy of the organisation.
Detailed description	Detailed information about the incident, such as where and when it occurred.
Involved parties	Users who are the subject of the complaint.
Provide the approximate date and time of the incident	Tentative date when the incident occurred.

Add involved parties from the Add Row dialog box that appears by clicking the **Add** button in the **Involved Parties** section of the Ethics Complaints form.

Involved Parties - Add Row dialog box

Field	Description
Involved party type	Type of involved party. • **Internal**: An employee within the organisation who is the subject of the complaint. • **External**: A user outside of the organisation who is the subject of the complaint.
Internal party name	Name of the involved party. The **Internal party name** field is replaced by the **External party name** field when **External** is selected as the involved party type.
Email	Email ID of the involved party. For the internal employee, the email ID is auto-populated from the User profile. For an external employee, enter the email ID. This field is available only when **External** is selected from **Involved party type**.
Notes	Any additional information about the involved party.

Ethics complaints intake form in the Anonymous Report Center portal

Employees can use the Ethics Complaints intake form in the Anonymous Report Center (ARC) portal to report an ethics violation incident. Different sets of fields appear on the form based on the active record producers.

The following fields appear on the Ethics Complaints form in the ARC portal when the record producer mapped to the Ethics [sn_lg_ops_ethics] table is active.

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Ethics Complaints form in the ARC portal

Field	Description
Complaint type	Type of complaint or allegation that violated the ethics policy of the organization.
Detailed description	Detailed information about the incident, such as where and when it happened.
Involved parties	Users who are the subject of the complaint. Enter the names or email IDs of the involved parties, each name separated by a comma.
Approximate date of event	Tentative date when the incident happened.
I understand that the information I'm providing, including any sensitive or personal details, will be reviewed by the appropriate teams	Option to acknowledge submitting sensitive information or personal details of people involved through the request.

The following fields appear on the Ethics Complaints form in the ARC portal when the record producer mapped to the Universal Request [universal_request] table is active.

Ethics Complaints form - ARC portal

Field	Description
Summary of complaint	Type of complaint or allegation that violated the ethics policy of the organization.
Detailed description	Detailed information about the incident, such as the detailed description of the incident, the names of the people involved, and the approximate date and time of the incident.

Involved Party form

Legal fulfillers or matter owners can use the Involved Party form to add or modify an involved party in a legal request or legal matter assigned to them.

Involved Party form

Field	Description
Type	Type of involved party. • **Complainant**: A user who submitted the complaint. • **Subject of allegation**: A user against whom the complaint has been submitted. • **Witness**: A user who was present at the incident described in the complaint. • **Other**: A user who can be a stakeholder in the investigation.
External user	Option to specify whether the user is from outside the organization.

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Involved Party form (continued)

Field	Description
Internal party	User added as an involved party. The **Internal party** field is replaced by the **External party** field when the **External user** option is selected.
Email	Email ID of the involved party. For the internal employee, the email ID is auto-populated from the User profile. For an external employee, enter the email ID. This field is available only when the **External user** option is selected.
Notes	Any additional information about the involved party.

Legal Matter Task form for legal investigations

Matter owners can use the Legal Matter Task form for adding task type of Documents, Recommended Actions, and Interviews as part of the legal investigation.

Legal matter task form with Recommended Action Details

Field	Description
Name	Unique name for the task.
Type	Type of the task. Select **Recommended Action**.
Priority	Level of priority to work on and complete the task. The priority of a task determines its importance for resolving the matter.
Phase	Phase to which the task belongs.
Matter	Matter to which the task belongs.
Event name	Name of the calendar event associated with the task. A calendar event with a due date helps you to track the progress of the task for specific milestones.
State	Current state of the task to determine the progress of the task.
Order	Order in which the task should be worked on when there are multiple tasks in a phase or matter.
Assignment group	User group to which the task is assigned.
Assigned to	User to whom the task is assigned. If an assignment group is selected, the list shows members of the selected group.
Due date	Date to complete the task.

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Legal matter task form with Recommended Action Details (continued)

Field	Description
Internal party	Names of the involved parties to whom the recommended actions apply.
Recommended Action Details section	
Recommended action type	Type of the recommended action such as verbal warning or suspension.
Discussion date and time	Date when the recommended actions should be discussed with the associated involved parties.
Additional attendees	Users other than the involved parties who would be part of the discussion meeting.
Description	Description of the recommended actions.
Notes section	
Work notes	Comments or notes that only authorized users related to the matter can see.
Additional comments	Comments or notes that the requester can also see.

The following table describes about the fields specific to the recommended action task type.

Recommended Action Details section

Field	Description
Recommended action type	Type of the recommended action such as verbal warning or suspension.
Discussion date and time	Date when the recommended actions should be discussed with the associated involved parties.
Additional attendees	Users other than the involved parties who would be part of the discussion meeting.
Description	Description of the recommended actions.

The following table describes about the fields specific to the interview task type.

Interview section

Field	Description
Start date and time	Date and time when the interview starts.
End date and time	Date and time when the interview ends. By default, when you select the start date and time, the end date time is automatically set to one hour after the start time. You can change based on the interview time.

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Interview section (continued)

Field	Description
Additional interviewers	Users other than the main interviewer (user selected in the **Assigned to** field of the task) who would be on the interview panel. When the task is saved, the additional interviewers are notified via email about the interview task.

Data mapping fields

Data mapping of tables is necessary when ethics matter is transferred by the legal fulfiller to HR and an HR Employee Relations case is transferred to the Legal department.

Involved Party

Legal Table: sn_lg_investigate_involved_party.

HR Table: sn_hr_er_involved_party.

Involved Party field mapping

Legal Fields	HR Fields
external_user	not_in_system
type	type
internal_party	user
external_party	name

Allegations

Legal Table: sn_lg_investigate_allegation.

HR Table: sn_hr_er_allegation.

Allegations field mapping

Legal Fields	HR Fields
allegation_type	allegation_type
allegation_subtype	allegation_subtype
description	description

Subjects of Allegation

Legal Table: sn_lg_investigate_m2m_allegation_party.

HR Table: sn_hr_er_m2m_allegation_party.

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Subjects of Allegation field mapping

Legal Fields	HR Fields
involved_party	involved_party
allegation	allegation
outcome	outcome

Evidence/Artifact

Legal Table: sn_lg_matter artifact.

HR Table: sn_em_evidence.

Evidence/Artifact field mapping

Legal Fields	HR Fields
sn_lg_matter_artifact.short_description	name
involved_party_users	subjects_of_allegation
submitted_by	submitted_by_involved_party

Evidence of type link

Legal Table: sn_lg_matter_artifact_external_storage.

HR Table: sn_em_evidence.

Evidence of type link field mapping

Legal Fields	HR Fields
sn_lg_matter_artifact_external_storage.short_description	name
link	url source

Interviews

Legal Table: sn_lg_matter task.

HR Table: sn_hr_er_interview.

Interviews field maping

Legal Fields	HR Fields
involved_party	interviewee
interview_notes	notes

Corrective/Recommended Actions

Legal Table: sn_lg_matter task.

HR Table: sn_hr_er_corrective action.

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Corrective/Recommended Actions field mapping

Legal Fields	HR Fields
involved_party	involved_party
also_present	also_present
discussion_date	discussion_date
description	description
state	status
recommended_action_type	corrective_action_type
due_date	due_date

Note: The **Description** field includes **Assigned to** or **Discussion held by** fields for user name.

Legal Simple Contracts

The ServiceNow® Legal Simple Contracts application enables employees to submit legal requests for getting legal support and guidance for contracts. For example, they can submit legal requests for the creation of Non-disclosure Agreement (NDA) documents with third parties or the review of sales contracts or third-party contracts. The legal department can manage and process them from a centralized location.

For example, employees can submit legal requests for the creation of NDA documents with third parties or the review of sales contracts or third-party contracts. The legal department can manage and process these requests from a centralized location.

Important: Legal Simple Contracts is now deprecated and no longer supported or available for new activation. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

You can migrate your data from Legal Simple Contracts to Contract Management Pro to take advantage of the enhanced features available in Contract Management Pro.

The migration script is designed only for migrating data from Legal Simple Contracts to the Legal Contract Repository, which applies specifically to Contract Management Pro for Legal Service Delivery. Contact your ServiceNow account team to learn about entitlement for the paid Contract Management Pro application.

Migration considerations

Contract Management Pro for Legal Service Delivery supports the following additional features as compared to Legal Simple Contracts.

- Clause management to effectively manage a library of clauses and clause variations.
- Clause variations for a Microsoft Word document template to dynamically place content in a contract depending on specified conditions.
- Multiple document support for third-party contract reviews that enables reviewing and finalizing multiple contract documents from a single request.

If you want to start using the features, migrate the Legal Simple Contracts data to Contract Management Pro for Legal Service Delivery, a licensed application that must be installed separately.

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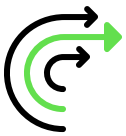
For more information, see Migrating to Contract Management Pro for Legal Service Delivery.

Explore  Learn about how employees, paralegal staff, and lawyers use Legal Simple Contracts.	**Setup**  Set up contract templates, deflection rules, third-party integrations, and other configurations.	**Request**  Submit and track legal requests for contracts.
Manage  Manage legal requests for contracts.	 **Analytics and Reporting** Coordinate work and improve processes with preconfigured dashboards.	**Reference**  Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Legal Simple Contracts

Legal Simple Contracts enables employees to submit legal requests for the creation or review of contracts with third parties, such as vendors, customers, and partners. The legal department can manage and process these submitted legal requests for contracts from a centralized location.

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Features

- Document templates in HTML, PDF and Microsoft Word format for standard contract documents such as non-disclosure agreements (NDA).
- Template blocks that can replace text based on conditions in the document templates of type HTML.
- Support for contract templates in Microsoft Word format that are easier to review, and modify.
- Integration with Microsoft Dynamics CRM to pull sales representatives and associated sales accounts and active opportunities data.
- Integration with electronic signature providers such as Docusign and Adobe Acrobat Sign.
- Integration with external storage providers such as Box, Google Drive, and Microsoft OneDrive to store final signed contract documents.
- Centralized repository of all signed and signed contract documents.

Legal support for contracts

Legal Simple Contracts enables your organization to provide legal support for the following contract requests:

- Non-disclosure agreement requests in Legal Simple Contracts
- Sales contract review requests
- Third-party contract review requests

To find out how to provide legal support for a custom contract type, see Create a legal contract intake workflow.

Configure Legal Simple Contracts

Set up the foundation data for legal simple contracts so employees can use them to submit a legal request to the legal department.

As an administrator, install and configure components for Legal Simple Contracts.

Install Legal Simple Contracts

Install Legal Simple Contracts application that enables employees to submit legal requests for getting legal support and guidance for contracts.

Activate Word Document Templates

By default Legal Simple Contracts support legal contract templates in HTML and PDF format. To enable the support for legal contract template in Microsoft Word format, install Word Document Templates (sn_doc_word) plugin.

Configure Legal Simple Contracts

Set up the foundation data for legal simple contracts so employees can use them to submit a legal request to the legal department.

Install Legal Simple Contracts

You can install the Legal Simple Contracts application (sn_lg_contracts) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

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Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Simple Contracts application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Legal Simple Contracts:

- Roles
- Tables

For more information, see Components installed with Legal Simple Contracts.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Simple Contracts application (sn_lg_contracts) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Simple Contracts.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Activate Word Document Templates

You can activate the Word Document Templates plugin (sn_doc_word) if you have the admin role. The application activates related ServiceNow® Store applications and plugins if they are not already installed.

About this task

The Word Template [sn_doc_word_template] table is installed with Word Document Templates.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Word Document Templates plugin (sn_doc_word) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Configure Legal Simple Contracts

Set up the foundation data for legal simple contracts so employees can use them to submit a legal request to the legal department.

As an administrator, review the installed components and modify them or add new ones as applicable.

Define a user as an internal signer

Define a user as an internal signer so that the signer can be added to a contract template to automatically populate in a contract document for a request.

Create a contract type

Create a contract type for defining different types of legal contract requests.

Legal contract templates

Create a document template that can be used when submitting a legal contract request to generate a standard legal contract with predefined content. You can create templates of HTML, PDF and Microsoft Word types.

Configure a rule for selecting a legal contract template

Configure a rule to identify and use the correct contract template based on the submitted legal request and generate a contract document for the requester.

Set up external signature and storage configurations

Set up external app configurations for legal contracts to enable services for electronic signature of contract documents and saving the signed contract documents in an external storage.

Email notifications

Configure email notifications to be sent when various events occur. Some possible event triggers might be when a signatory signs or declines to sign a contract document or all signatories have signed the contract document.

Configure Microsoft Dynamics CRM for sales contracts

Integrate with Microsoft Dynamics CRM to import active opportunities data and information on sales representatives and their associated sales accounts into the tables in the ServiceNow instance.

Schedule import set jobs to pull data from the CRM system

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Schedule import set jobs to pull sales representatives and associated sales accounts and active opportunities data from the CRM system into the ServiceNow instance.

Create a deflection rule for sales contracts

Create a deflection rule for providing guidance to requesters for a sales contract based on specified conditions.

Define a user as an internal signer

Define a user as an internal signer so that the signer can be added to a contract template to automatically populate in a contract document.

Before you begin

Role required: sn_lg_ops.legal_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Internal Signatories**.
2. Define or modify an internal signer.
   - To define a new internal signer, click **New**.
   - To modify an existing internal signer, open the internal signer from the list.
3. On the form, fill in the fields.

Internal Signatories form

Field	Description
Internal signer	User designated as an internal signer. The list shows users from the Users [sys_user] table.
Authorized signatory name	Legal name of the selected user. The legal name is fetched from the Employee Profile form.
Signatory title	Official title of the selected user.
Signatory email	Email id of the selected user.

4. Save the internal signer.
   - Save an internal signer by clicking **Submit**.
   - Save the changes to an existing internal signer by clicking **Update**.

Create a contract type

Create a contract type for defining different types of legal contract requests.

Before you begin

Role required: sn_lg_contracts.contracts_config

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Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Types**.
2. Create or modify a contract type.
   - To create a contract type, click **New**.
   - To modify an existing contract type, open the contract type from the list.
3. In the **Name** field, enter a unique name for the contract type.
4. Select the **Active** check box to enable this contract type.
   Only active contract types are available for use in document templates, contract repository, and third-party or NDA contract-related legal requests.
5. Save the contract type.
   - Save a contract type by clicking **Submit**.
   - Save the changes to an existing contract type by clicking **Update**.

Legal contract templates

Create document templates to generate contract documents depending on various request types.

You can save time and manual rework by using document templates to create contract documents instead of filling out a contract document from scratch for each request. It's also an efficient way of generating consistent contract documents for legal requests.

- Configure legal contract of type HTML
- Create a legal contract template of type PDF
- Configure legal contract templates of type Microsoft Word
- Configure a rule for selecting a legal contract template

Configure legal contract of type HTML

Configure a contract template of HTML format.

Document template blocks for legal contract HTML templates

Document template blocks are dynamic blocks of content that you can use when only a section of a template has to be changed for different requirements or request types. For example, say in an NDA contract document, only one section needs to be changed based on the geographic region of the signing legal entity. Ideally, you would create multiple document templates with the identical content with the only difference being location-related content. The condition-based document template blocks, on the other hand, enable you to create only one document template that can generate documents for different locations.

The following are the key features of using document template blocks in document templates:

- Use a single document template block in multiple document templates for different versions of the same contract.
- Add multiple document template block contents to a document template block with defined conditions and execution order. An appropriate block content is picked up dynamically in the generated document based on these defined conditions and execution order.
- Add multiple document blocks in a document template.

Create a document block for legal contract templates

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Create document blocks that you can use in multiple document templates for legal contracts.

Add block content in a document template block

Add one or more block contents in a document template block and define its condition and execution order.

Create a legal contract template of type HTML

Create a document template of type HTML.

Create a document block for legal contract templates

Create document blocks that you can use in multiple document templates for legal contracts.

Before you begin

Role required: admin

About this task

Note: All document template blocks must be created in the Legal Request Management application scope only.

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Template Blocks**.
2. Click **New**.
3. On the form, fill in the fields.

Document Templates Block form

Field	Description
Name	Unique name for the document template block.
Table	Table to which you want to associate the document template block. Select **General Contract Support [sn_lg_ops_general_contract_support]**.
Active	Option to make the document template block active and available for use.
Description	Information about the document template block.

4. Click **Submit**.

What to do next

Add block content in a document template block.

Add block content in a document template block

Add one or more block contents in a document template block and define its condition and execution order.

Before you begin

Role required: admin

About this task

Note: All block content in a document template block must be created in the Legal Request Management application scope only.

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Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Template Blocks**.
2. Select a document template block.
3. In the **Document Templates Block Contents** related list, click **New**.
4. On the form, fill in the fields.

Document Template Block Contents form

Field	Description
Name	Unique name for the block content.
Block	Name of the document template block associated with the document block content.
Order	Order in which a block content is used. If multiple block contents meet a condition, the block content with the lower-order value is chosen first.
Active	Option to indicate that the block content is active and available for use.
Applies when	Filter conditions applied on the selected table to determine which document template block to use.
Applies to	User criteria to which the block content is applicable. For example, a block content applicable to employees of a specific location, associate the block content with a user criteria containing only employees of that region.
Body	Text in the block content that appears on the document generated from the associated document template. Include fields from the selected table from the **Select Variable** pane.

5. Click **Submit**.

What to do next
Create a legal contract template of type HTML.

Create a legal contract template of type HTML

Create a document template of type HTML.

Before you begin
Role required: admin

About this task
Legal contract templates help you to create and organize standard contract templates along with fillable metadata placeholders. You can create templates of HTML, PDF and Microsoft Word types. In an HTML document template type, you can map the inputs provided in the intake form to the fillable metadata placeholders.

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Select **New**.

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3. Select **HTML Document Template**
4. On the form, fill in the fields.

HTML Template form

Field	Description
Name	Unique name of the template.
Table	Name of the table that contains the fields to include in the document template. Select **General Contract Support [sn_lg_ops_general_contract_support]**. **Note:** Tables are shown depending on the selected application scope.
Contract type	Contract type to which the template is associated.
User criteria	User criteria to control which users can use the document.
Body	Content to include in the generated legal contract document. Insert columns from the selected table to the document template: **a.** Point the cursor to the desired location in the text editor. **b.** In **Select variables**, click the plus icon (⊞) beside **Fields**. **c.** From the fields list, select a column name. The selected column is added at the cursor position. **Note:** The variables from the legal intake form must be mapped to a column so that they can be used to populate the template.
Select variables	List of variables that can be used in the body of the template. Variables pull information from the selected table to customize the template.
Header tab	
Header Image	Image file to use in the document header.
Header image height	Maximum height of the header image.
Header Position	Position of the image within the header.
Footer tab	

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Field	Description
Footer image	Image file to use in the document footer.
Footer image height	Maximum height of the footer image.
Footer image position	Position of the image within the footer.
Footer text	Text such as privacy and confidential statement to appear in the footer.
Footer text position	Position of the footer text within the footer.
Vertical alignment	Placement of the footer text relative to the footer image.
Page tab	
Page size	Page size of the document.
Custom font	Font of the text on the page.
Top/Bottom margin	Margin to leave on the top and bottom sides of the page.
Left/Right margin	Margin to leave on the left and right sides of the page.

5. **Optional:** Click **Insert Date** to insert a date at the cursor location in the template.
   You can insert multiple date types mapped to different date columns from the selected table such as start date, end date, or current date.
6. **Optional:** Add a document template block to insert condition-based content on the generated document.

   a. Point the cursor to the desired location in the text editor and click the **Add Blocks** button.

   b. In the Add Blocks pane, search for a document template block.

   c. Select a block to add to the template and click **Insert to Template**.
   The selected block is inserted at the selected point in the template.

   d. **Optional:** Drag the inserted block to place it to another location in the template.

7. Save the contract template.
   - Save a contract template by clicking **Submit**.
   - Save the changes to an existing contract template by clicking **Update**.

   The contract template is saved in the Draft state. The Participants related list appears.
8. Add participants in the contract template.

   a. In the Participants related list, click **New**.

   b. In the **Name** field, enter the display name for the participant.
   For example, for an internal signatory, you could enter `Internal Signer 1`.

   c. In the **Order** field, enter the order in which the signature request will be initiated for the participant.

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d. In the **Signer** field, select a user field from the list of fields populated from the selected table. The user in the mapped field is automatically added as a signatory in the document.

e. In the **User** field, select the same field as in the **Signer** field.

f. Click **Submit**.

9. Insert signatures in the contract template.
   a. Place the cursor in the desired location in the **Body** field.
   b. Select **Insert Signature** to insert signature variable for a participant.
   c. In the Add a signature window, select a participant.
   d. Click **OK**.
10. Insert signature date in the contract template.

    a. Place the cursor in the desired location in the **Body** field.

    b. Enter the code `${sign_date:<Participant Name>}` to insert signature date variable for a participant.
    For example: To capture the signature date for the participant Abel in the contract template, enter `${sign_date:Abel}`.

11. To make the template available for usage, click **Publish**.

Create a legal contract template of type PDF

Create a document template of type PDF by uploading an editable and fillable PDF file.

Before you begin
Role required: admin

About this task
Legal contract templates help you to create and organize standard contract templates along with fillable metadata placeholders. You can create templates of HTML, PDF and Microsoft Word types. In a PDF document template type, you can upload a fillable PDF file and map fields in the PDF file with fields in a table.

Procedure
1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Select **New**.
3. Select Create **PDF Document Template**.
4. On the form, fill in the fields.

PDF Template form

Field	Description
Name	Unique name of the template.
Table Name	Name of the table that contains the fields to include in the document template.

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Field	Description
	Select **General Contract Support [sn_lg_ops_general_contract_support]**.
Contract type	Contract type to which the template is associated.
Active	Option for marking the contract template as active.
User criteria	User criteria to control which users can use the document.
Document	Option to upload a fillable PDF for further customization. Click the **Click to add** link to upload a PDF file.

5. Save the contract template.
   - Save a contract template by clicking **Submit**.
   - Save the changes to an existing contract template by clicking **Update**.

   The contract template is saved in the Draft state. Related lists to manage participants and to map PDF Template fields appear.
6. Add participants in the contract template.
   a. In the Participants related list, click **New**.
   b. In the **Name** field, enter the display name for the participant.
   For example, for an internal signatory, you could enter `Internal Signer 1`.
   c. In the **Order** field, enter the order in which the signature request will be initiated for the participant.
   d. In the **Signer** field, select a user field from the list of fields that are populated from the Signer [sn_lg_contracts_signer] table.

      Note: You can select only the highlighted user fields.

      The user in the mapped field is automatically added as a signatory in the document.
   e. In the **User** field, select a user field from the list of fields that are populated from the Users [sys_user] table.
   f. Click **Submit**.
7. Map a PDF field mapping to a field in the selected table.
   a. Click the **Parse PDF** related link.

      Note: The related link appears only if the attached PDF file is editable.

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The editable fields from the attached PDF file are added in the PDF Template Mappings related list.

b. In the PDF Template Mappings related list, click **Field name** to open the field mapping.

c. On the PDF Template Mappings form, update the fields.

PDF Template Mapping form

Field	Description
Field name	Name that represents the field mapping and stored as part of the document mapping in the database.
PDF template	Name of the PDF template to which the mapping record belongs.
Document field	Field from the editable PDF file. ⚠ **Warning:** Editing the document field might break the document template flow.
Document field type	Type of the mapping field.
Preview value	Value of the mapping field for preview. You can use this field to validate a field value that would appear in the generated document without creating a legal request to test your mappings.
Format	Format to enter values by the participant in the field. A validation error appears when the participant doesn't enter a value in the specified format.
Read only	Option for enabling the editing of the field by the selected participant.
Mandatory	Option for marking the field as required to be filled by the assigned participant.
Active	Option for marking the field mapping as active.
Mapping table	Table from which the mapping fields are referenced.
Mapping field	Field from the mapping table that maps to the field in the **Document field**.
Participant	User who can edit the field in the document. The list is populated from the Participants related list.
Advanced script	Option for using scripted fields for complex mapping of a field. On selecting, the **Script** field appears.
Script	Enter a script to configure script fields for a complex field mapping.

d. Click **Update**.

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8. Specify an area in the PDF document where you want to collect the signatures of the participants.

   a. Click the **Mark Signatures** related link.

   b. In the Mark Signature Blocks dialog box, click **Add Field**.

   c. In the document preview pane, mark an area by dragging the mouse device.

   d. In the **Name** field, enter a name for the signature-mapping record.

   e. In the **Mapping** list, select a user as the signer.
   The list shows participants from the Participants related list.

   f. Click **Save**.

9. **Optional:** Click **PDF Preview** to preview the document.
10. To make the template available for usage, click **Publish**.

Configure legal contract templates of type Microsoft Word

Configure a contract template of Microsoft Word format that are easier to review and modify.

Add content controls in a Microsoft Word document

As a legal contract configurator, prepare a Microsoft Word document that you want to import as a contract template by marking the content with content controls so it can be efficiently parsed and reused.

Before you begin

Ensure that you are on a Windows system to add content controls in a Microsoft Word document.

Role required: sn_lg_contracts.contracts_config

Procedure

1. In Microsoft Word, open the document that you want to import as a contract template.
2. Display the **Developer** tab in Microsoft Word.
   For more information, see the Show the Developer tab topic in the Microsoft Office 365 documentation.
3. Select the content to be tagged.
4. Select **Plain Text Content Control** from the **Developer** tab.
5. Select the **Properties** option from the **Developer** tab.
6. In the **Content Control Properties** dialog box, enter a title for the content control.
7. Enter a tag value.

Note:

- The tag names are not case sensitive. If there are two tag names as field_COMPANY and field_company, both will be treated same.
- The maximum character limit for the tag is 200.

Tag names contain a prefix with the content control type.

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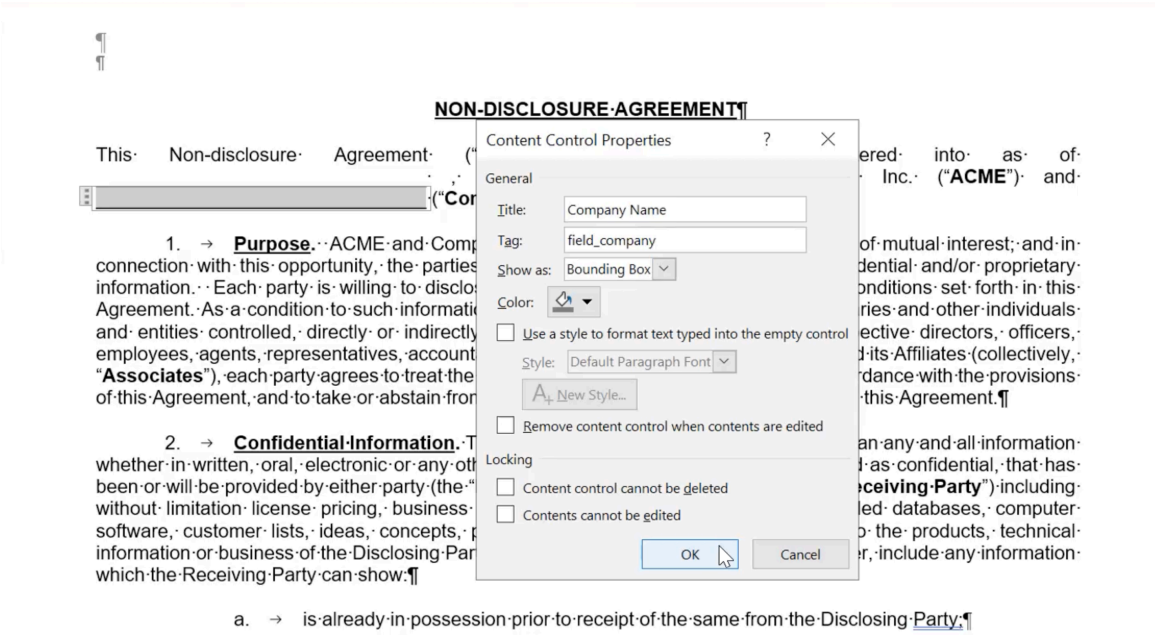
Supported content control types

Content control type	Description
field_	Indicates metadata.
signature_	Indicates a signature.
sign_date_	Indicates the signing date.

For example, Microsoft Outlook Add-In for Legal Service Delivery If you are adding a metadata for company name, you would name the tag *field_company*.



8. Select **OK**.

Create a Microsoft Word legal contract template

Create a legal contract template in Microsoft Word format that can be used to generate a standard contract with predefined content when an employee submits a contract request.

Before you begin

Role required: sn_lg_contracts.contracts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Select **New**.
3. Select **Word Document Template**.
4. On the Word Template New Record form, fill in the fields.
   For a description of the field values, see Word Template New Record form.
5. Extract the content marked by the supported content controls from the imported document by selecting **Parse Document**.

   The supported content controls are:

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- **field** - Indicates metadata
- **signature_** - Indicates a signature
- **sign_date_** - Indicates the signing date

For more information on the supported content controls and tagging guidelines, see Add content controls in a Microsoft Word document.
The content controls derived from the documentare listed in the Template mappings related list.

6. Select **Save**.

Result
The contract template is saved in the Draft state.

Create and configure participants for legal contract template

Add and configure participants that act as placeholder for users who will be assigned as signers of a contract document.

Before you begin
A Microsoft Word document must have been uploaded and parsed to provide template mappings for the contract template. For more information, see Create a Microsoft Word legal contract template.

Role required: sn_lg_contracts.contracts_config

Procedure
1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Open a contract template.
3. In the Participants related list, click **New**.
4. On the form, fill in the fields.

Participant New record form

Field	Description
Name	Unique display name of the mapped participant. **Note:** The length of the name should be equal to or less than the length allocated in the Word document template for a signer.
Order	Order in which the signature request will be initiated for the participant.
Signer	User field from the list of fields that are populated from the Signer [sn_lg_contracts_signer] table. **Note:** You can select only the highlighted user fields. The user in the mapped field is automatically added as a signatory in the document.

5. Select **Submit**.

Update contract template mappings for legal contract template

Update template mappings to pre-fill information that will be placed in the contract document.

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Before you begin

Role required: sn_lg_contracts.contracts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Open a contract template.
3. Navigate to the Template mapping related list.
4. Select the field to update.
5. On the form, fill in the fields.

Template Mapping form

Field	Description
Field name	This field is automatically populated with the title of content control. For example: Company
Document field	This field is automatically populated with the tag of the content control. The field has the field type prefixed to the name. For example: field_companyName.
Document field type	The type of field being mapped. The choices are: ○ Text Field: A placeholder for metadata. ○ Signature: A placeholder for signatures during the electronic signature process. ○ Signature date: A placeholder for the date of the signing.
Preview value	A field mapping value used instead of the placeholder when testing the template. This field appears only when **Text field** is selected from **Document field type**.
Format	Format in which values are to be entered by the participant. A validation is displayed if the entered value does not match the specified format, This field appears only when **Text field** is selected from **Document field type**.
Read Only	Option for enabling the editing of the field by the selected participant.
Active	Option for activating the template mapping.
Mapping table	This field is automatically set to the table to which the document template is associated.
Mapping field	Mapping field used to map the values from the table field that will be inserted when this template is used in a contract. This field appears only when **Text field** is selected from **Document field type**.
Participant	Select the participant associated with the contract template.

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Field	Description
	○ If **Document field type** is set to **Text field**, the selected participant is responsible for the task. ○ If **Document field type** is set to **Signature**, the selected participant is responsible for signing the document. ○ If **Document field type** is set to **Signature date**, the date of signing by the signatory will be placed in the document.
Advanced script	Option to display the Script editor.
Script	Script configuring the mapping between fields and record producer variables. This field is enabled only when the **Advanced script** field is selected.

6. Select **Update**.

Publish a contract template

Publish contract template to make it available for generating a standard legal contract document with predefined content when a legal user submits a contract request.

Before you begin

Ensure the template mappings has been completed before you publish a contract template mappings. For more information, Update contract template mappings for legal contract template.

Role required: sn_lg_contracts.contracts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Open a contract template.
3. **Optional:** Review the contract document template.
   a. Generate and preview the contract document.
   For more information, see Preview a contract document for a Word document template.
   b. If any changes are necessary, update the document and save it.
4. On finalizing the content of the contract document, select **Publish**.

Result

The state of the contract template is published.

Configure a rule for selecting a legal contract template

Configure a rule to identify and use the correct legal contract document template based on the submitted legal request and generate a contract document for the requester.

Before you begin

Role required: sn_lg_ops.legal_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Template Rules**.
2. Configure or modify a contract template rule.

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- To configure a new contract template rule, click **New**.
- To modify an existing contract template rule, open the contract template rule from the list.

3. On the form, fill in the fields.

Contract Template Rule form

Field	Description
Name	Unique name of the contract template rule.
Active	Option for marking the rule as active.
Description	
Contracts table	Table in which the contract requests are saved.
Condition	Conditions under which the contract template selection rule applies. For example, to apply a rule when a legal request is submitted in an NDA category, you would enter the following condition: **[Category][is][NDA]**.
Document template	Published and active document template that will be picked for generating the contract document when the specified conditions are met.
Execution order	Order in which the selection rule is run. If there are multiple rules that meet the conditions from a legal request, a template rule with a lower-order number is run for selecting the template.

4. Save the contract template rule.
   - Save a contract template rule by clicking **Submit**.
   - Save the changes to an existing contract template rule by clicking **Update**.

   The Internal Signatories Mapping related list appears.
5. Map internal signers.
   a. In the Internal Signatories Mapping related list, click **New**.
   b. In the **Internal Signer** field, select a user from the list of internal signers.
   The list shows all users from the Signer [sn_lg_contracts_signer] table.
   c. In the Participant field, select user from the list of participants added in the template selected in the **Document template** field.
   d. Click **Submit**.

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Configuring external applications for legal contracts

Set up external applications that provide services such as electronically signing contract documents and saving signed contracts or the documents related to legal requests in an external storage system.

The Legal Service Delivery applications use spokes from Integration Hub to integrate with external applications. The legal configurator can complete configuring these external apps after the administrator has installed and configured these spokes.

Integration with external storage systems

Configure external storage provider spokes

The administrator can use the Integration Hub to install and configure the following external storage provider spokes for saving documents attached to legal requests and signed contract documents:

- Box spoke
- Google Drive spoke
- Microsoft OneDrive spoke

Configure an external storage provider

The legal configurator can set up the external storage app integrations for legal apps from **Legal Integrations**. For more information, see Configure an external storage system for legal requests and legal matters.

Integration with e-signature providers

Configure electronic signature provider spokes

The administrator can use the Integration Hub to install and configure the following electronic signature provider spokes for contract documents:

- Adobe Acrobat Sign spoke
- Docusign spoke

Set up the electronic signature provider app

The legal configurator can set up the electronic signature app integrations for legal apps from **Legal Integrations**. For more information, see Configure an e-signature provider for legal contracts.

Configure an e-signature provider for legal contracts

Configure an electronic signature provider to enable users to sign contract documents electronically.

Before you begin

Ensure that the administrator has installed and set up spokes in Integration Hub for the electronic signature providers that you want to configure.

Adobe Sign spoke **spoke v2.5.1 or later version**

For more information on the setup and synchronizing the Adobe Acrobat Sign group, see Synchronize Adobe Acrobat Sign group with ServiceNow.

DocuSign spoke **spoke v2.2.0 or later version**

For more information on the setup and creating the Docusign account, see Set up Docusign eSignature spoke using authorization code grant.

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Role required: sn_lg_ops.request_config or sn_lg_contracts.contracts_config or sn_lg_matter.matter_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Legal Integrations** > **Integrations**.
2. Create or modify an external app configuration.
   - To create an external app configuration, click **New**.
   - To modify an existing external app configuration, open the external app configuration from the list.
3. On the Integration Type page, click the **Electronic Signature** link.
4. On the form, fill in the fields.

Electronic Signature form

Field	Description
Name	Name of the external app configuration.
Description	Description of the external app configuration.
Active	Option for marking the external app configuration as active.
Table	Table in which the contracts data is stored. Select the **General Contract Support [sn_lg_ops_general_contract_support]** table.
Condition	Filter conditions to determine which integration account to use. For example, say you've already set up the Docusign electronic signature account and want only NDA contracts to use that account for signatures, you can define the condition as follows: **[Category] [is] [NDA]** and then select the Docusign in the **Integration provider** and its associated account in **Account**.
Execution order	Order in which an integration account is used for electronic signature of contract documents. Integration account with the lower-order value is chosen first.
App	Electronic signature provider such as Adobe Acrobat Sign or Docusign.
Account	Account number associated with the electronic signature provider. This field appears only when **Docusign** is selected from **Integration provider**.
Group	Group associated with the electronic signature provider. This field appears only when **Adobe Acrobat Sign** is selected from **Integration provider**.

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Field	Description
Attributes	Additional configuration items based on your electronic signature provider. Provide the following details: **Host Url**: Add the URL of the selected electronic signature provider that enables you to finalize or update the contract document before sending them to signatories. For example, use Web UI URL for **Adobe Acrobat Sign** or use **Docusign** UI for DocuSign.

5. Save the external app configuration.
   - Save a new external app configuration by clicking **Submit**.
   - Save the changes to an existing external app configuration by clicking **Update**.

   The external app configuration is saved.
6. Click **Publish**.

Result
The configuration of the e-signature app is published and is ready to be used for the electronic signing of contract documents.

Configure Microsoft Dynamics CRM for sales contracts

Configure Microsoft Dynamics CRM to import the sales representatives, sales accounts, and active opportunities data into the tables in the ServiceNow instance for the sales contracts support.

Before you begin
Ensure that the administrator has installed and set up spokes for the CRM app you want to configure.

Microsoft Dynamics CRM spoke v1.3.0 or later version

For more information on the setup and creating the Microsoft Dynamics CRM account, see Set up Microsoft Dynamics CRM spoke.

Role required: sn_lg_ops.request_config, sn_lg_contracts.contracts_config, or sn_lg_matter.matter_config

Procedure
1. Navigate to **All** > **Legal Administration** > **Legal Integrations** > **Integrations**.
2. Create or modify an external app configuration.
   - To create an external app configuration, click **New**.
   - To modify an existing external app configuration, open the external app configuration from the list.
3. On the Integration Type page, click the **CRM** link.
4. On the form, fill in the fields.

CRM form

Field	Description
Name	Name of the CRM app configuration.

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Field	Description
Description	Description of the CRM app configuration.
Active	Option for marking the configuration for CRM app configuration as active.
Table	Table in which the information about sales contracts is stored.
Condition	Filter conditions to determine which CRM app configuration to use.
Execution order	Order in which a CRM app is used for creating contract documents. The system with the lower-order value is chosen first.
App	CRM app such as Microsoft Dynamics CRM.

5. Save the external app configuration.
   - Save a new external app configuration by clicking **Submit**.
   - Save the changes to an existing external app configuration by clicking **Update**.
6. Click **Publish**.

Result
The configuration for the Microsoft Dynamics CRM app is published and is ready to be used in sales contract review requests.

What to do next
- Schedule import set jobs to pull data from the CRM system
- Create a deflection rule for sales contracts

Schedule import set jobs to pull data from the CRM system

Schedule import set jobs to pull sales representatives and associated sales accounts and active opportunities data from the CRM system into the ServiceNow instance.

Before you begin
Configure Microsoft Dynamics CRM for sales contracts.

Role required: admin

About this task
- By default, the import set job is scheduled to run daily to pull the data from the CRM system.
- Only active sales representatives and opportunities are pulled from the CRM system. All opportunities that are not won or lost are considered as active opportunities.
- When an opportunity is closed and not associated in any other active legal requests, the scheduled job will remove the opportunity record from the ServiceNow instance.

The import set jobs trigger a Workflow Studio flow that pulls the data from the CRM system into the ServiceNow instance. The maximum number of records pulled each time the job runs is based on the following Workflow Studio properties:

- **The maximum number of records to return when fetching data** (*sn_flow_designer.action_picker_limit*)
- **The maximum amount of iterations that a loop will run in flow designer** (*sn_flow_designer.max_iterations*)

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Based on the number of records pulled for your system, you can modify the values of these properties. For more information, see Workflow Studio system properties.

Procedure

1. Navigate to **All** > **System Import Sets** > **Administration** > **Scheduled Imports**.
2. Open a scheduled data imports record to update.
   The following scheduled data import jobs for pulling data from the CRM system are available:
   - **Sales Representatives Scheduled Data Import**
   - **Sales Accounts Scheduled Data Import**
   - **Sales Opportunities Scheduled Data Import**

   For more information, see Scheduled data imports
3. Configure the data import job as needed.
   For more information on configuring a data import set schedule, see Schedule a data import.
4. **Optional:** To pull data from a different set of fields from the CRM system, update the corresponding transformation maps.
   For more information on configuring a transformation map, see Create a transform map.

Create a deflection rule for sales contracts

Create a deflection rule for providing guidance to requesters for a sales contract based on the specified conditions.

Before you begin

Role required: sn_lg_contracts.contracts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Deflection Rules**.
2. Create or modify a deflection rule.
   - To create a deflection rule, click **New**.
   - To modify an existing deflection rule, open the deflection rule from the list.
3. On the form, fill in the fields.

Deflection Rule form

Field	Description
Name	Unique name of the deflection rule.
Order	Order in which the deflection rule is run. If there are multiple rules that meet the conditions from a legal request, a deflection rule with a lower-order number is run for providing the guidance.
Active	Option for marking the deflection rule as active.
Short description	Brief description about the deflection rule.
Table	Table in which the contract requests are saved.

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Field	Description
	The table name is automatically set to **Sales Contract Support [sn_lg_ops_sales_contract_support]**.
Conditions	Conditions under which the deflection rule applies. For example, to apply a rule when a sales contract has an opportunity size greater than or equal to $50,000, you would enter the following condition: **[Opportunity size][greater than or is] [$50,000]**.
Guidance	Message that is shown to the requester while submitting a sales contract review request to provide guidance. For example, you can add a link to knowledge base article relevant to the legal request or to external web page. **Note:** Some formatting options, such as text alignment, underline text, and different fonts and sizes, might not apply in the output.

4. Save the deflection rule.
   - Save a deflection rule by clicking **Submit**.
   - Save the changes to an existing deflection rule by clicking **Update**.

Activate a system property to generate a certificate of completion

As an admin, activate the *sn_lg_contracts.enable_executed_contract_audit_certificate* system property to generate a certificate of completion for electronically signed non-disclosure agreements (NDA) and third-party contracts.

Before you begin

You must have configured an electronic signature provider. For more information, see Configure an e-signature provider for legal contracts.

Role required: sn_lg_ops.legal_admin

About this task

Note: This feature is applicable only for electronically signed contracts. For more information on submitting NDA and third-party contracts, see Submit a legal request for a NDA and Submit a legal request for a third-party contract review.

The certificate of completion provided by Docusign or Adobe Acrobat Sign includes the audit trail with the timestamp details about each signatory action during an electronic signature. The audit trail ensures non-repudiation and resolves any objections.

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Procedure

1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `sn_lg_contracts.enable_executed_contract_audit_certificate` property.
3. Select the property.
4. If you aren't able to edit the property in the current application scope, select the word **here** in the message at the top of the page.
5. Update the **Value** field to `true`.
6. Select **Update**.

Result
A certificate of completion will be issued for the contract.

Create a legal contract intake workflow

Create a legal contract intake workflow by creating a record producer and configuring base system settings so that employees can request the legal department's guidance on legal contracts.

Before you begin
Role required: sn_lg_contracts.contracts_config, admin

About this task
The legal support for a contract request works based on a workflow, so you must provide specific information while setting up the intake process.

Procedure

1. Create a record producer for a new contract type.
   For more information, see Create or modify a record producer for legal services through Classic environment. On the form, you must provide the following specifications in the record producer for a new contract type:

   a. In the **Table name** field, select the General Contract Support [sn_lg_ops_general_contract_support] table.
   The contract workflow is associated with the General Contract Support table.

   b. Set the **contract_type** field to a contract type name such as `NDA`, `MSA`, or `SOW`, if you wish to set up the intake form to select specific contract type.

   Example
   For example, to set the contact type to NDA, enter the following code:

   ```
   current.contract_type = 1;
   ```

   c. If the contract requires the signature of outside parties, in the Variable Sets related list, click **Edit** and add the **External signatory details** variable set.

2. Add a new intake form in the Contracts practice area.
   For more information, see Add an intake form to a practice area. Ensure to provide the following details in the respective fields.

   a. From the **Type** drop-down list, select **Request**.

   b. In the **Options** field, select **Assigned To field not mandatory**.

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c. For third-party contract intake form, the **Generate Document from Template** option must not be enabled.

d. From the **Request record producer** field, select the record producer created in the Step 1 to associate with the intake form.

3. Create legal contract templates.
   - For more information, see Legal contract templates.
   - In the **Conditions**, you must select the new category added for the new contract.
4. Configure a rule for selecting a legal contract template when a legal contract request is being created by a user.
5. Configure the settings in the Standard Ticket Page for legal requests.

   Note: The following settings must be updated in the Legal Simple Contracts application scope.

   a. Navigate to **Standard Ticket** > **Standard Ticket Configuration**.

   b. Select the **sn_lg_ops_request** ticket configuration.

   c. On the Ticket Configuration form, select **Documents** in the Tab Configuration related list.

   d. On the Tab Configuration form, add the condition **[Category][is][<CategoryName>]** in the **Visible** field, where <CategoryName> is the category created for the new contract.

   e. Click **Update**.

   f. Repeat steps 5c-5e for the **Preview** tab configuration.

   For more information, see Configure the standard ticket page

Migrating to Contract Management Pro for Legal Service Delivery

Migrating from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery enables you to use Microsoft Word templates and contract templates.

Preparing for migration from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery

Prepare the ServiceNow instance to migrate the data from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery.

Note the following requirements to prepare your ServiceNow instance for migration:

- Contract Management Pro for Legal Service Delivery is installed.

  Note: Contract Management Pro for Legal Service Delivery is a licensed application and must be installed separately from the ServiceNow® Store. For more information, see Install Contract Management Pro for Legal Service Delivery.

- Any customizations done in Legal Simple Contracts must be reproduced in Contract Management Pro for Legal Service Delivery.
- Any changes to the contract repository records should be done before closing the legal request or the changes will have to be done manually after migration.
- Record producers available in Legal Simple Contracts should be re-created in Contract Management Pro for Legal Service Delivery.
- If you have configured external storage for Legal Simple Contracts, ensure you have done so for Contract Management Pro for Legal Service Delivery.

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- Create Microsoft Word document templates in Contract Management Pro for Legal Service Delivery that are equivalent to the HTML or PDF contract templates available in Legal Simple Contracts.
- Ensure that Contract Management Pro for Legal Service Delivery is set up correctly. For more information, see Configure Contract Management Pro for Legal Service Delivery

Migrate to Contract Management Pro for Legal Service Delivery from Legal Simple Contracts

As a legal contracts administrator, migrate data from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery using the migration script.

Before you begin

Ensure you have prepared the ServiceNow instance for migration. For detailed information, see Preparing for migration from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery.

Role required: sn_lg_cnt.contract_admin

About this task

- Migrating a large number of records can take a significant amount of time, so consider running the migration during non-peak working hours.
- The data related to Legal Simple Contracts will be available even after migration.
- During migration, the following artifacts are copied to Contract Management Pro for Legal Service Delivery:
  - Contract types
  - Contract repository records

  For more information, see Data copied to Contract Management Pro for Legal Service Delivery during migration from Legal Simple Contracts

  Note: Legal requests that are in progress are not migrated. Once a request is closed and the contract finalized, the contract repository records created are automatically copied to Contract Management Pro for Legal Service Delivery if you have run the migration script.

- During migration, data related to Sales contract review will not be migrated.
- During migration, contract revisions and intake forms will not be migrated.

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Types**.
2. Note the contract types listed in the table.
3. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Contracts Types**.
4. Create the contract types noted in step 2.
   While creating contract type ensure you associate it with a contract model. For more information, see Create a contract type
5. Navigate to **All** > **Legal Practice Apps** > **Legal Contracts** > **All Contracts**.
6. Note the number of records in the list of contract repository records.
7. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
8. Select the *Migrate Old Contracts* scheduled job.

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9. Select **Execute Now** to migrate the data.
10. Compare the number of records created in the Legal Contracts Repository [sn_lg_cnt_repository] table to the number of records you noted to track the progress and the total migration success.
11. Access the log messages to check for any failures.
    a. Check for error messages with the prefix *ContractMigrationUtils*, which indicates a failure to migrate a record.
    b. For any failed records, check the *Migrate contract related records* and *Copy Contract Attachments* subflow to determine the cause of the failure.
    c. Fix the errors and re-run the migration script.

Data copied to Contract Management Pro for Legal Service Delivery during migration from Legal Simple Contracts

A migration utility copies data from Legal Simple Contracts tables to Contract Management Pro for Legal Service Delivery tables.

Tables migrated

Legal Simple Contracts tables	Contract Management Pro for Legal Service Delivery tables
Contract type [sn_lg_contracts_type]	Contract type [sn_cm_core_contract_type]
Legal Contract [sn_lg_contracts_repository]	Legal Contracts Repository [sn_lg_cnt_repository]

Contract type table

The contract type table is copied to Contract Management Pro for Legal Service Delivery.

If a contract type already exists in the Contract Management Pro for Legal Service Delivery table, the contract type is not migrated.

After migration, any modification or deletion of the contract type in the Legal Simple Contracts table will not be automatically synced to the Contract Management Pro for Legal Service Delivery table.

Data migrated

Contract type [sn_lg_contracts_type]	Contract type [sn_cm_core_contract_type]	Description
Name	Name	Name of the contract type.
Active	Active	State of the contract type.
Domain	Domain	Regional domain.

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Legal Contract Repository table

Legal requests for non-disclosure agreement and third-party contract reviews that are in the Close Complete state are copied to Contract Management Pro for Legal Service Delivery.

The following table provides the details of the Legal Simple Contracts data and the corresponding Contract Management Pro for Legal Service Delivery data.

Data copied from Legal Contract to Legal Contracts Repository

Legal Contract [sn_lg_contracts_repositc	Legal Contracts Repository [sn_lg_cnt_repository]	Description
Contract Request	Contract Request	Contract request number
Contract Status	State	The state of the request. The mapping between states in the old and new repository. • Terminated in the old repository is marked as Cancelled in the new repository. • If the start date of the contract is in the past, Amended in the old repository is marked as Active. • If the start date of the contract is in the future, Amended in the old repository is marked as Draft. • Expired in the old table without dates is marked as Expired in the new table. • Expired in the old table with contract start date in the past is marked as Active. • Expired in the old table with a contract end date in past is marked as expired. • Expired in the old table with a contract start date in future is marked as Draft. • Active in the old table with a start date in past is marked as Active. • Active in the old table with a start date in the future is marked as Draft.

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Data copied from Legal Contract to Legal Contracts Repository (continued)

Legal Contract [sn_lg_contracts_repositc	Legal Contracts Repository [sn_lg_cnt_repository]	Description
		• Active in the old table without dates is marked as Active. • Canceled in the old repository is marked as Canceled in the new repository.
Number	Legacy Contract	The contract number from Legal Simple Contracts.
Contract Type	Contract Type	Type of contract from Contract Management Pro for Legal Service Delivery table.
Contract Start Date	Starts	Start date of contract
Contract End Date	Ends	End date of contract
Contract Owner	Contract administrator	The administrator of the contract.

Company Name	Company Legal name
	Vendor
		The Vendor field is populated based on the availability of Company Name in the Companies [core_company] table.
		• Company name exists.
		  ○ Single match found - Vendor is populated with the company name.
		  ○ Multiple matches found - Vendor field is populated with the Company Legal name. When the contract repository record is opened, a recommendation is displayed to modify the Vendor value manually.
		• New company does not exist in both tables.
		  ○ Single match found- Vendor is populated with the company name.
		  ○ Multiple matches found- Vendor field is not populated and an error is displayed when the record is opened. You can map the value for Vendor manually.
		When there is no match for vendor field, the company name is copied to company

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Data copied from Legal Contract to Legal Contracts Repository (continued)

Legal Contract [sn_lg_contracts_reposito	Legal Contracts Repository [sn_lg_cnt_repository]	Description
		legal name and error is displayed to fill the vendor value.
Company Address	None	The Company Address is part of the Vendor details.
Country	None	The Country details are part of the Vendor details.
None	Contract type model	Contract model associated with the contract type.

Data copied from the Legal Contract table to the Contract Document table

Legal Contract [sn_lg_contracts_reposito	Contract Document [sn_cm_core_document]	Description
None	Name	Name of the document. The name is in the format "<contract type> for <company_name>." If the contract type is empty, the name is in the format "<contract_number> for <company_name>."
External folder URL	URL	URL of the external storage folder.
External folder id	External id	ID of the external storage folder.
External provider	Storage provider	Document storage provider.
Request opened by	Owner	The user who opened the request.
None	Contract type	Contract type corresponding to the record.
None	Default version	Version of the document revision that is marked as Ready.

Data copied from the Legal Contract table to the Contract Document Revision table

Legal Contract [sn_lg_contracts_reposito	Contract Document Revision [sn_cm_core_document_revision]	Description
Refer to the newly created document	Document	Revision of the document.
None	Name	Name of the document revision.

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Data copied from the Legal Contract table to the Contract Document Revision table (continued)

Legal Contract [sn_lg_contracts_reposito	Contract Document Revision [sn_cm_core_document_revision]	Description
		For external storage: The name is in the format "<contract type> for <company_name>." If the contract type is empty, the name is in the format "<contract_number> for <company_name>." For internal storage: The name is in the format <document_name>.
None	File type	The type of document revision. For external storage, the document revision type is a URL. For internal storage, the document revision type is an attachment.
Signed Contract	URL	The signed contract is available at the external storage URL.
External file ID	External id	ID of the external file.
None	Version state	The document revision number, which is set to 1 initially.
Document	Document	The file in the document field is copied to the newly created revision record.

Result of migration from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery

On the running the script to migrate data from Legal Simple Contracts to Contract Management Pro for Legal Service Delivery, the data is copied along with other changes made to Legal Simple Contracts modules, Legal Counsel Center, and the Legal Executive dashboard.

- After migration, the following modules of Legal Simple Contracts are marked as legacy:
  - **Simple Contracts Admin**
  - **Simple Contracts**
  - **Legal Contracts**
- Legal contract requests that are not yet complete continue to be visible in the Legal Counsel Center.
- In the Legal Counsel Center, the migrated contract repository records are displayed in the All Contracts list in Legal Contracts, which you can access by navigating to **Lists** > **Legal Contracts** > **All Contracts**.

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- In the Legal Executive dashboard, legacy contract requests from Legal Simple Contracts are displayed in the following tabs:
  - Contracts(legacy) tab
  - Contracts tab: Navigate to the Legacy contract requests section to view the contract requests.
- Any new contract repository records created due to completion of a legal request are automatically migrated to Contract Management Pro for Legal Service Delivery.

Submitting Legal Simple Contracts requests

Employees from different departments in your organization can submit legal requests for the creation or review of contracts with third parties, such as vendors, customers, and partners.

Non-disclosure agreement requests in Legal Simple Contracts

Employees can submit legal requests for creating non-disclosure agreement (NDA) contracts with third parties such as vendors, customers, and partners. The legal department can manage and process these requested changes from a centralized location.

Features

- Contract templates with metadata and business rules for selecting the most relevant template for a request.
- Complete self-service for creating standardized NDA contracts.
- Requests to change the standardized contracts routed to the legal team.
- Support for electronic signatures.
- Electronic signature integrations with Adobe Acrobat Sign and Docusign.
- Support for wet signature to enable effective collaboration between the signatories.
- Document storage on the ServiceNow instance as well as external storage systems such as Box, Google Drive, and Microsoft OneDrive.
- Legal contracts repository containing the metadata of signed contract documents.
- Configurable system property to generate a certification of completion for an electronically signed non-disclosure agreement (NDA). For more information, see Activate a system property to generate a certificate of completion.

Non-disclosure agreement contract request - Workflow

When a requester submits a legal request, an NDA contract document is created using a standard contract template based on the information from the request. The information from the request is inserted at the appropriate places in the template.

If needed, requesters can request specific changes in the generated NDA contract document. The legal department can manage and process these requested changes to make necessary revisions to the NDA contract document from a centralized location.

If the generated NDA document doesn't require any changes, the requester can send it to the signatories for an electronic or manual signature. After all signatories have signed the contract document, it's stored in the ServiceNow instance or an external storage system. The requester and legal department members can access the signed contract document from the Legal Contracts repository.

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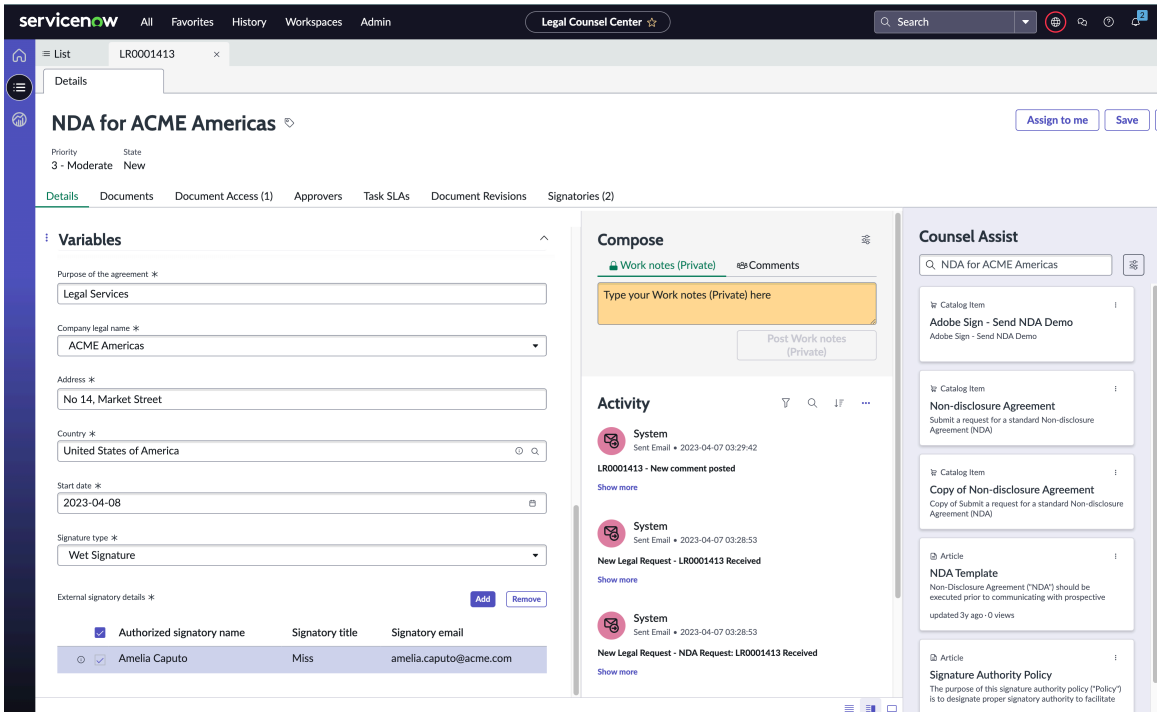

Example: Workflow for a non-disclosure agreement contract request

A sample workflow for a non-disclosure agreement contract request might progress as follows:

1. Setting up the following items in the application:
   - Multiple variations of NDA templates
   - Template selection rule to choose the correct template based on the legal request
   - Internal signatories for different templates
   - E-signature integration - Adobe Acrobat Sign or Docusign
2. Employee fills out the NDA intake request form.
3. Employee previews the generated contract with metadata and sends it to the signatories.
4. All signatories submit the required signatures.
5. The signed contract is attached to the legal request record.
6. A contract repository record is created with the metadata and signed contract.
7. (Optional) The signed contract is moved to the configured storage and referenced in the contract repository section.

Submit a legal request for a NDA

Submit a legal request for a non-disclosure agreement with third parties such as vendors, customers, or partners.

Before you begin
Role required: sn_lg_ops.legal_user

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Procedure

1. Access the non-disclosure agreement intake form.

Option	Description
Using Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **Legal** > **Browse all Legal** from the header. **c.** Search for and open the **Non-disclosure agreement** request item.
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**. **c.** Search for and open the **Non-disclosure agreement** request item.

2. On the form, fill in the fields.

Non-disclosure agreement intake form

Field	Description
Is this for a Vendor, Customer, or Partner?	Category of the third party.
Purpose of the Agreement	Purpose of the agreement. Example: Non-disclosure agreement for new business investments.
Company legal name	Legal name of the third party with whom you are making an agreement. If the company name isn't listed, select **[Company not listed]** option and enter the name in the **New company legal name**.
Address	Mailing address of the third party.
Country	Country of the third party.
Start date	Start date of the agreement period.
Signature type	Type of signature. ○ Electronic signature: The signatory digitally signs the contract. ○ Wet signature: The signatory manually signs the physical version of the contract. The default signature type is Electronic Signature.
External signatory details	List of people from the selected third party who would sign the agreement.

3. **Optional:** Modify the list of signatories.

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- (Optional) To add a signatory, select **Add** and provide the signatory's details.
- (Optional) To modify a signatory's information, select the Edit row icon (✎) on the signatory's row and update the details.
- (Optional) To remove a signatory, select the Remove row icon (✖) on the signatory's row.

4. Select **Submit**.
   - A legal request for generating a contract document for non-disclosure agreement is created in the New state.
   - A contract document in the Document Ready status is generated with data from the request using a contract template based on the contract template rules. Internal signatories based on the template are also populated in the generated document. For more information, see Configure a rule for selecting a legal contract template.

     Note:
     - If more signatories have been added in the request than are needed for the contract as defined in the contract template, only the default number of signatories are necessary for signing the contract. Other signatories are marked as Not Considered.
     - If fewer signatories are included in the request than are required for the contract, you can add more signatories.

     In either case, you can submit a change request to update the number of signatories as required for your contract.
   - A record for each external signatory is created in the Signer [sn_lg_contracts_signer] table.

   For more information on how to view and track a legal request, see View and track legal request details.
5. **Optional:** If you need changes in the generated document, submit a change request to the legal department.
   For more information, see Review and finalize the contract document.
6. **Optional:** Modify the request details or manage signatories by selecting **Actions** and then selecting **Edit Request**.
   This option is available only if the request state is New and the document status is Document Ready. For more information, see Modify a legal request.
7. When the contract document is finalized, send it to the signatories for getting it signed.
   For more information, see Review and finalize the contract document.

Work on a legal contract request

As a member of the legal contracts support team, review and revise a contract document as per the requested changes. Upload the revised document to the request and send the document to the requester from within the request.

Before you begin

The practice area lead or group manager should have assigned you the request. If not, you can open the request to assign it to yourself or someone in the group.

Role required: sn_lg_ops.legal_fulfiller

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About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Note: During times when you're unavailable, you can delegate your legal duties to other users.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. **Optional:** If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

   Note: Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal request.
5. **Optional:** Initiate an ad hoc approval for a legal request or its attachment for the legal request or its attachments when an approval is required from other stakeholders.
6. **Optional:** In the **Signatories** tab, review the signatories for the contract document and their status.
7. In the Activity section, review the changes requested by the requester and make necessary changes in the contract document.
   For the contract documents is in DOCX format,
   - When external storage is configured, you can edit and save the document revision directly from the external storage.
   - When internal storage is configured, download the contract document, edit, save it and upload it using Create revision option.
8. Upload the revised contract document.
   a. In the **Document Revisions** tab, click **Create Revision**.
   b. In the Upload Revision dialog box, click the **Attach File** link and upload the revised document.

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c. **Optional:** Add work notes to provide any information on the attached document.

d. If the attached file is the final revision and is ready to be sent to the requester for review and confirmation, select the **Mark as ready** check box.

e. Click **Upload**.
The attached document is added to the request. The revision number of the latest document is one higher than the previous document revision number. The document is listed in the **Document Revisions** tab.

9. Click **Send Document** to send the contract document that is marked as ready to the requester.

Result
The updated document is sent to the requester for the review. The document status updates to Document Ready.

Review and finalize the contract document

Review and finalize the contract document for sending it for signature.

Before you begin
Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.
2. Select **My Requests** from the form context menu.
3. Select **View all requests** from the drop-down list.
4. Select the legal request from the list.
5. Review the contract document from the Preview tab.
In the preview tab, the contract document of type PDF or HTML will be downloaded in PDF format, whereas contract document of type Microsoft Word will be download in DOCX format.
6. **Optional:** If any changes need to be made to the contract document, submit a change request.

a. From the **Actions** drop-down list, select **Request Changes**.

b. In the Request Changes dialog box, enter the details you want to update.

c. Select **Submit**.
The change request is submitted to the legal department for revision in the contract document and its status updates to Work in Progress. The document status of the contract document updates to Internal Legal Review.

Anyone from the legal department can make the requested changes in the document and send the updated document back to you.

Note: You cannot access a document preview until the legal department sends back the revised document.

What to do next
When the contract document is finalized, send it for signature by selecting **Send for signature**.

Signature process for a legal request

You can require either an electronic or a wet (manual) signature for a legal request. The contract approval process differs depending on the signature type selected.

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- Electronic Signature: Enables users to sign contract documents electronically. For more information, see Configure an e-signature provider for legal contracts. Select the signature type as Electronic Signature if you also want to generate a certificate of completion. For more information, see Activate a system property to generate a certificate of completion.
- Wet Signature: Enables the finalization of the contract manually rather then electronically. You can then upload the finalized document. For more information on uploading the document, see Add a manually signed contract.

When the contract document is finalized, it is sent it to the signatories to get it signed.

Submitting a Contract document for signature

For Electronic Signature	For Wet Signature
• The document status updates to Sent for Signature and electronic signature flow is triggered as in legal integration. An email notification that the contract document is available for signature is sent to the first signatory. The email contains a link to the contract document that the signatory can open and sign the document through the Docusign or Adobe Acrobat Sign electronic signature provider as configured in the electronic signature legal integration. The first signatory is the one whose Order value in the list of signatories is set the lowest in the contract template rule. For more information, see Configure a rule for selecting a legal contract template. An email is sent to the next signatory in order after the first has signed the contract to request their signature. • Signatories can accept or decline the signature request. For more information, see Sign or decline a legal contract electronically in Legal Simple Contracts.	• The document status updates to Pending Signature. • An email notification is sent to the signatories with the contract document attached. • The signatories print the document, sign it, and return it to the legal requester. • The legal requester uploads the contract document in PDF format to the request. For more information, see Add a manually signed contract.

Sign or decline a legal contract electronically in Legal Simple Contracts

As a signatory, you can review and sign or decline to sign a contract document.

Before you begin

Role required: none

About this task

This task is applicable only for contracts that have the signature type set to **Electronic Signature**. If the contract requires a wet (manual) signature, the signatories receive an email with the contract attached, sign it, and return it to the legal requester. The legal requester then attaches the contract document in PDF format to the request.

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Procedure

1. Select the link in the email notification.
2. Review the contract document and sign it or decline to sign it.

Result

The following table shows the results of signing the contract document and declining to sign it.

Result of approving or rejecting a contract

Sign the contract document	Decline to sign the contract document
• If there are more signatories to sign the contract document, it's sent to the next signatory in the order. The status of current signatory in the request updates from Pending Signature to Signed. The status of the next signatory updates from Not Started to Pending Signature. • If the last signatory has signed the document, a legal contract record is created. The document status updates to Contract Signed. • If the system property `sn_lg_contracts.enable_executed_contract_audit_certificate` is set to `true`, the certificate of completion is generated and appended to the finalized contract document.	• The contract document is sent back to the requester. An email notification that the signer has declined to sign the document is sent to the requester. The requester can review the document and request changes in the document and resend to signatories for signature. The Signatory status in the request updates to Cancelled. • The document status in the request updates from Pending Signature to Contract Declined.

Wet Signature workflow

The wet signature workflow is triggered when a legal request with signature type as Wet Signature is sent to the signatories for signing.

The signature type is specified while submitting a legal request. For more information, see Submit a legal request for a NDA.

The generic workflow for wet signature might progress as follows.

As a signatory:

- Receive an email notification requesting your signature.
- Open the contract document attached to the email.
- Print the contract attachment.
- Sign the contract printout and send it back to the requester.

As a legal requester:

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- After receiving the signed contract document from all signatories, generate digital copy in PDF format.
- Attach the digital copy of the contract document to the legal request. For more information, see Add a manually signed contract.

Add a manually signed contract

As a legal requester, on receiving the signed contract document from the signatories, add the digital version to the legal request record.

Before you begin

You must have a PDF version of the signed contract.

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.

   Note: If you're using Employee Center, you can submit a legal request by navigating to the Employee Center portal and selecting a request from the **Legal services** > **Browse Legal services** menu.

2. Select **My Requests** option in the form context menu.
3. Select **View all requests** from the drop-down list.
4. Select the legal request from the list.
5. Select **Upload Contract** and navigate to the file.
6. Select **Open**.
7. If you have uploaded an incorrect file, upload the correct document by selecting **Reupload Contract** from the **Actions** drop-down list.
8. Select **Close Complete** to close the legal request.

   Note: You can't make any changes to the legal request after the legal request is closed.

Result

When the legal request is closed, an email with the final contract document attached is sent to the signatories.

Sales contract review requests

Sales team members can submit legal requests for sales contract review when they have to engage legal counsel for customer queries, review the terms and conditions provided by customers, or for legal guidance. The commercial legal team can review the sales contract and provide the requested contract support.

Features

- Routing requests to the legal team for changes to standard contracts and on-demand approvals for content changes.
- Configurable deflection rules to provide predefined legal guidance based on the CRM data, such as account segment and opportunity size.
- Ad hoc approvals for contract drafting.
- Legal contracts repository containing metadata of signed contract documents.

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Setting up a sales contracts review request

The administrator must set up the following items for the sales team members to see their assigned sales accounts and opportunities while submitting legal requests for sales contract review:

- Configure Microsoft Dynamics CRM for sales contracts
- Schedule import set jobs to pull data from the CRM system
- Create a deflection rule for sales contracts

Sales contracts review request - Workflow

As a sales team member, you can submit a legal request for getting legal support on sales contracts for the sales opportunities or accounts you own. On clicking the **Submit** button, the system checks for a deflection rule to match its defined conditions with the information entered in the request.

- If the conditions in any deflection rules do not match the details of the request, the legal request is submitted and assigned to the legal sales contract group.
- If the conditions of a deflection rule match the details of the request, the preconfigured legal guidance text appears in a dialog box. You can choose to take one of the following actions:
  - Follow the guidance and cancel submitting the Legal request.
  - Provide appropriate reasons in **Business justification** and submit the request.

The legal department can manage and process these requested changes to make necessary revisions to the contract document from a centralized location.

Submit a legal request for sales contract review

Submit a legal request to the legal team for review and legal support for a sales contract.

Before you begin

Role required: sn_lg_contracts.sales_user

About this task

You can submit a request for review of a sales contract to engage legal counsel, get a response to customer questions, or have the terms and conditions provided by customers reviewed.

Procedure

1. Access the sales contract review intake form.

Option	Description
Using Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **Legal** > **Browse all Legal** from the header. **c.** Search for and open the **Sales Contract Review** request item.

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Option	Description
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**. **c.** Search for and open the **Sales Contract Review** request item.

2. On the form, fill in the fields.

Sales Contract Review intake form

Field	Description
What does your request involve?	Category of the contract. If the required category is not listed, select **Others**.
Provide details if others	Details of the category. This field appears only when **Others** is selected from **What does your request involve?**.
Account	Sales accounts, owned by you, pulled from the Microsoft Dynamics CRM system. **Note:** Only the sales account that you have been assigned to are listed.
Opportunity	List of active opportunities associated with the selected account. If no opportunity is associated with the selected account, leave the field empty. **Note:** Only the opportunities that you have been assigned to are listed.
Deal closure date	Expected closure date of the opportunity, pulled from the CRM system. You can modify the deal closure date to any future date, as required.
Additional information	Additional information about the sales contract.

3. **Optional:** Click the add attachments icon (📎) to upload an attachment to the request.
4. Click **Submit**.
   The system checks for deflection rules to provide guidance based on the entered information.

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- If the conditions in any deflection rules do not match the details of the request, the legal request is submitted.
- If the conditions of a deflection rule match the details of the request, the preconfigured legal guidance text appears in a dialog box. You can choose to take any one of the following actions:
  - Follow the guidance and cancel submitting the Legal request.
  - Provide appropriate reasons in **Business justification** and submit the request.

Result
The legal request is created and assigned to the legal sales contract group.

Work on a sales contract review request

As a member of the legal contracts support team, review and revise a sales contract document as per the requested changes. Upload the revised document to the request and send it to the requester directly from the request.

Before you begin
The practice area lead or group manager should have assigned you the request. If not, you can open the request to assign it to yourself or someone in the group.

Role required: sn_lg_ops.legal_fulfiller

About this task
As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. **Optional:** If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

   Note: Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field.

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The collaborators are notified via email that they have been added as collaborators to a legal request.

5. **Optional:** Initiate an ad hoc approval for a legal request or its attachment for the legal request or its attachments when an approval is required from other stakeholders.
6. In the Activity stream section, review the changes requested by the requester and make necessary changes in the contract document.
7. **Optional:** Communicate using emails from Legal Counsel Center with the requester or other stakeholders.
8. Download the attached contract document to make changes requested by the requester
9. **Optional:** After the sales contract is finalized, create a legal contract repository record to store the document.

   a. In the **Legal Contracts** tab, click **New**.
   The Legal Contract form displays that contains most fields auto-populated from the legal request fields.

   b. Upload the updated contract document.

   Upload contract document

Option	Steps
Upload the contract document in the request	In the **Attachments** section, attach the contract document file. ▪ If you are attaching a file for the first time, click **Browse**. ▪ If you are attaching additional files, click the add attachment icon (+).
Upload the contract document to an external storage and add its link	In the **Signed Contract** field, enter the URL of the contract document that is uploaded on the external storage system.

   c. Click **Save**.

10. After resolving the legal request, close the request by clicking **Close Complete**.

Third-party contract review requests

Employees can submit legal requests for review of third-party contracts by the legal team.

Features

Third-party review requests include the following features:

- Electronic signature integrations with Adobe Acrobat Sign and Docusign.
- Support for storing contract documents in your ServiceNow instance or external storage systems such as Microsoft OneDrive and Google Drive.
- Legal contracts repository containing the metadata of signed contract documents.

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- Support for a configurable system property (`sn_lg_contracts.enable_executed_contract_audit_certificate`) to generate a certification of completion. For more information, see Activate a system property to generate a certificate of completion.

Third-party contract review request - Workflow

As a legal fulfiller on the legal team, you can work on the assigned third-party review requests by completing the following activities:

- Review the contract document attached to the legal request and make any necessary changes.
- Email the revised contract document to third-party contacts for review directly from the Legal Counsel Center.
- View responses from third-party contacts in the activity stream of the legal request.

  Multiple iterations of revisions between your company and the third party might be necessary before the contract document is finalized by all parties.
- Complete the document in the configured e-signature system by adding required fields and send it for signature
- Send the contract document to the required signatories (both internal and external) for their electronic signatures.

After all signatories have signed the contract document, it is stored on the ServiceNow instance or an external storage system. The requester and legal department members can access the signed contract document from the Legal Contracts repository.

Submit a legal request for a third-party contract review

Submit a legal request for review of third-party contracts by the legal team.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

- You can submit a request for review of a third-party contract to engage legal counsel, get answers to questions from the third party, or have the terms and conditions provided by them reviewed.
- The certificate of completion is generated only if you have configured the system property `sn_lg_contracts.enable_executed_contract_audit_certificate`. For more information, see Activate a system property to generate a certificate of completion.

Procedure

1. Access the third-party contract review intake form.

Option	Description
Using Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **Legal** > **Browse all Legal** from the header. **c.** Search for and open the **Third-party Con tract Review** request item.

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Option	Description
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**. **c.** Search for and open the **Third-party Contract Review** request item.

2. On the Third Party Contract Review form, fill in the fields.
   For a description of the field values, see Third Party Contract Review form.
3. Click **Submit**.

Result
A legal request for reviewing of the attached third-party contract document is created in the New state.
For more information on how to view and track the legal request, see View and track legal request details.

What to do next
As a member of the legal department contract support team, you can work on the request to review the contract and get it signed. For more information, see Work on a TPC review request.

Modify a legal request

As a legal user, modify a legal request to update the request's details or replace the attached contract document with an updated version.

Before you begin
You can modify a request until it is in the New state.

Role required: sn_lg_ops.legal_user

Procedure
1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **Legal services** from the header.
3. Open your submitted legal request from the **My Requests** option on the header menu.
4. On the Standard Ticket page, from the Actions menu, select **Edit Request**.
5. Update the request's details or replace the attached contract document with an updated version.
6. Select **Save** to update the record.

Work on a TPC review request

As a member of the legal contracts support team, review and revise a third-party contract document. You can email the revised document to stakeholders to verify the revisions and then send the ready document for e-signature from within the legal request.

Before you begin
Role required: sn_lg_contracts.contracts_fulfiller

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About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Note: During times when you're unavailable, you can delegate your legal duties to other users.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the list icon ( ).
3. In the **Lists** tab, open a legal request by selecting an option under **Legal Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state of the legal request is Work in progress and the document is Legal review.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. **Optional:** If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

   Note: Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal request.
5. In the **Document Revisions** tab, manage all revisions of the contract document.

Option	Steps
To review an existing document revision	○ Select the name of the document to open the document revision record. ○ To preview the file, click the file name in the **Document** field. ○ To download the file, click the download icon ( ). ○ To mark the document revision as ready, se lect **Ready**.
To create another document revision	Create another document revision if more changes are required in the most recent ver sion of the document.

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Option	Steps
	a. Click **Create Revision**. The Create Revision dialog box displays. **b.** In the **Create revision from** list, select the location of the document. ▪ **Computer**: Select a file from your local system. Click **Attach File** and upload a file. ▪ **Activity**: Select an attachment from the Activities stream. All files that are attached in the inbound emails are listed in the **Document** field. ▪ **Online**: Select a file stored in the configured external storage system. **c.** Add more information about the document in the **Work notes** field. This information is added to the Activities stream along with the attachment. **d.** To make the document ready for review or sending for e-signature, select **Ready**. **e.** Click **Create**. The document is added to the request. The revision number of the latest document is one higher than the previous document revision number. The document revision is listed in the **Document Revisions** tab.

Note: If you mark the current document revision as Ready, any previous document versions that were marked as Ready are cleared.

6. **Optional:** Send the document for ad-hoc approval when an approval is required from other stakeholders.
7. Send an email to stakeholders to have the completed contract document reviewed and the changes confirmed.

   a. Click **Compose Email**.

   b. In the **New Email Draft** tab, add recipients' email addresses in the **To**, **CC**, and **BCC** fields as required.
   The **To** field is pre-populated with the third-party point of contact email entered in the request, and the **CC** field with the requester's email id.

   c. Enter the subject of the email in **Subject**.
   The short description of the request is populated by default.

   d. In the **Attachments** field, click the **+Add File** link to add the documents and then select the source of the file.

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If you've marked a contract document revision as Ready, it is attached to the email by default.

e. Enter the message in the email body.

f. Click **Send Email** to send the email immediately, or **Save as draft** to send it later.

8. In the **Signatories** tab, add signatories to whom the contract will be sent for e-signature.
9. When all stakeholders have agreed on a contract document revision, click **Prepare for Signature** to prepare and send the document to the signatories for e-signature.

   Note: When you select **Prepare for Signature**, the document opens on the configured e-signature portal.

   The document status updates from Internal Legal Review to Preparing for Signature.
10. Complete the document in the configured e-signature system and send it for signature.
    a. Preview the document to ensure that the content is correct.
    b. Add the required fields including the Signature field.
    c. Click **Send**.
    An e-signature envelop is created and sent to all signatories. If the system receives a success notification from the electronic signature provider, the document status updates from Preparing for Signature to Pending Signature.

What to do next

1. Signatories can review and sign or decline to sign the contract document.
2. You can check the document status in the request.
   - If all signatories sign the contract document, the document status updates to Contract Signed. A legal contracts repository record is created where the signed document is attached or linked. You can also access the legal contract repository record from the **Legal Contracts** tab.
   - In the **Signatories** tab, the status of all signatories updates to Signed.
   - If any signatory declines to sign the contract document, the document status updates to Contract Declined.If more changes are required in the contract document, update it and resend it to the signatories for signature.
3. If the contract is signed by all parties, you can close the request by clicking **Close Complete.**

Cancel a legal request

Cancel a third-party contract request if it is no longer necessary.

Before you begin

Important: Cancelling a legal contract request after it has been sent for signature stops the process in its current state.

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.
2. Open your submitted legal request from the **My Requests** option on the header menu.
3. On the Standard Ticket page, from the Actions menu, select **Cancel Request**.

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4. In the dialog box, enter comments to explain why the request was canceled.
5. Select **Confirm Cancellation**.

Result

- The request is canceled and the associated active flows are terminated. The cancellation comments appear in the **Activity** tab of the request.
- The document status changes to Contract Voided.
- The document signature sent to signatories is canceled to block further signing. The signatories get an email notification that the legal request has been canceled.

Manage Legal Simple Contracts

As administrator work on managing the legal contract templates and legal contracts.

Edit a contract template of type Microsoft word

Edit a contract template to reflect any modifications that must be included in the template to generate a standard contract when an employee submits a contract request.

Before you begin

Role required: sn_lg_contracts.contracts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Open a contract template from the list.
3. On the form, modify the fields.

Word Template New Record form

Field	Description
Name	Unique name for the contract template.
Table	Table to which you want to associate the contract template.
Category	Document category to which you want to associate the contract template.
Document	The document from which you want to import template field mapping. The selected document should be a Microsoft Word (.docx) document and should have valid content controllers. For more information, see Add content controls in a Microsoft Word document.
Template date format	Format in which you want the date to appear when an agent previews the document, generates the attachment, or initiates document tasks for participants.

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Field	Description
	Note: ○ When signing using a ServiceNow application or the AdobeSign application: If no value is selected in **Template date format**, the value specified in the **template_date_format** system property is considered. If both **Template date format** and **template_date_format** system property are empty, the value in the Date format field from the agent's user profile is considered. ○ When signing using a DocuSign application: The date format selected in Signing settings in the DocuSign application is considered over **Template date format** in the configured word template in a ServiceNow instance.
Template language	Language in which you want dynamic tokens to be translated when an agent previews the document, generates the attachment, or initiates document tasks for participants. **Note:** ○ Template language is a mandatory field. The default language is none. ○ Translation feature is available only when language plugins are installed on the ServiceNow instance.
State	The state is automatically set to Draft.
Application	Application to which the contract template belongs. This field is automatically set to the application scope in which you're creating the contract template.
Active	Option to make the template active and available for use.

4. In the **Contract Type** field, select only one category of the contract type.
   If you're creating a template for non-disclosure agreement, select **Non Disclosure Agreement** as the contract type.
5. Select **Parse Document** to extract any modified content marked by content control from the imported document.
   Any new added content controls will be listed under Template Mappings.
6. Map any new meta data found during parsing.
   For more information, see Update contract template mappings for legal contract template.
7. Select **Update** to save the modifications.

Preview a contract document for a Word document template

View the final form of a contract document with the content controls replaced with the values of the variables or return values of scripts.

Before you begin
Role required: sn_lg_contracts.contracts_config

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Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Open a contract template.
3. Select **Preview**.
4. In the Preview Document window, select the Lookup using list icon
5. Select a legal contract request from the list for which you want to generate a sample contract document.
6. Select **Generate Preview** and close the Preview document pop-up window.
7. In the **Manage Attachments** field, select **View** to view the document.
8. **Optional:** Select the document link to download it.
9. **Optional:** Modify the contract template if you want to make any changes.

Preview and download a signed contract document

Preview and download a signed contract document.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

When all signatories have signed a contract document, it is considered the final contract document and stored in the Legal Contract [sn_lg_contracts_repository] table.

Access to a contract document is based on the following user roles and conditions:

- A Contracts Fulfiller can create, view, and update contract documents.
- Only a Contracts Administrator can delete contract documents.
- Requesters can view only contract documents for which they submitted the legal request.
- Users can view only contract documents for which they are included on the watch list of the corresponding legal requests.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the list icon ( ).
3. In the **Lists** tab, under **Simple Contracts**, select **Legal Contracts** .
4. In the list of legal contracts, select a company name to open the contract.
5. Review the contract document and associated request details.
6. **Optional:** Download the contract document.

External integration status	Action
Active and published	Select the link in the Signed Contract list in the **Details** tab
Not available	**a.** Select the attachment icon in the Counsel Assist sidebar. **b.** In the Attachments section, select the ac tions icon ( ) and then select **Download**.

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- If an external integration is active and published, open the external storage location to download the contract document by selecting the link in the Signed Contract list in the **Details** tab.
- If an external storage integration is not available, select the attachment icon in the Counsel Assist sidebar and then in the Attachments section, click the actions icon (⋮) and select **Download**.

Create a Word document contract template from an existing template

Create a new contract template from an existing template if you need only a small variation in the content of an existing template.

Before you begin

Role required: sn_lg_contracts.contracts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Simple Contracts Admin** > **Contract Templates**.
2. Open the contract template from the list.
3. Select **Copy**.
   A template revision is created with the data related to participants and template mappings.
4. **Optional:** Import template field mappings from a Microsoft Word document with content controls.
   For more information, see Add content controls in a Microsoft Word document.

   a. In the **Document** field, select **Update**.

   b. Select **Choose file**.

   c. Choose a file and select **Ok**.

   d. Select **Parse document**
      - The document is parsed.
      - The metadata that was already present is retained.
      - The metadata that was present earlier but not found in the recent parsing is deleted.
      - The metadata that is new is added.

   A new file is uploaded to the contract template.

What to do next

Map any new meta data found during parsing. For more information, see Update contract template mappings for legal contract template.

Legal Simple Contracts reference

Reference topics provide additional information about the lists and forms that you use in Legal Simple Contracts.

Components installed with Legal Simple Contracts

Several types of components are installed with activation of the Legal Simple Contracts application, including tables and user roles.

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Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed

Role title [name]	Description	Contains roles
Contracts Administrator [sn_lg_contracts.contracts_admin]	Application-specific administrator role for the Legal Simple Contracts app having the administrative access for the app and full access to the underlying data.	• sn_lg_contracts.contracts_config • sn_lg_contracts.contracts_fulfiller
Contracts Configurator [sn_lg_contracts.contracts_config]	Provides access to configure data such as document templates, internal signatories, template rules. It does not provide access to transactional data of requests and matters.	• connection_admin • sn_docusign_spoke.docusign_user • sn_adobesign_spoke.Adobe_Sign_User • sn_lg_ops.legal_user
Contracts Fulfiller [sn_lg_contracts.contracts_fulfiller]	Provides the fulfiller access for working on assigned contract requests.	sn_lg_ops.legal_user
Sales User [sn_lg_contracts.sales_user]	Provides the read access on sales opportunities and accounts data.	sn_lg_ops.legal_user

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Scheduled data imports

Scheduled data imports installed

Scheduled data imports	Description
Sales Representatives Scheduled Data Import	Pulls all sales representatives data from the CRM system into the Sales Representative [sn_lg_contracts_sales_representative] table. This is the main scheduled data import job that is scheduled to run once daily at the set time.
Sales Accounts Scheduled Data Import	Pulls Accounts associated with the sales representative into the Sales Account [sn_lg_contracts_sales_account] table. This job runs after the Sales Representatives Scheduled Data Import job finishes.
Sales Opportunities Scheduled Data Import	Pulls Opportunities associated with the sales representative into the Sales Opportunity [sn_lg_contracts_sales_opportunity] table. This job runs after the Sales Accounts Scheduled Data Import job finishes.

Tables

Tables installed

Table	Description
Contract Request Mapping [sn_lg_contracts_repository_request_m2m]	Stores the details of the relationship between a request in the General Contract Support [sn_lg_ops_general_contract_support] table and a contract record in the Legal Contract [sn_lg_contracts_repository] table.
Contract Template Rule [sn_lg_contracts_template_rule]	Stores rules to identify a template contract document based on the input data in a request. Extends the Application File [sys_metadata] table.
Contract Type [sn_lg_contracts_type]	Stores the types of contract.
Deflection Rule [sn_lg_contracts_deflection_rule]	Stores deflection rules for sales contract reviews to provide resolution to the requesters based on the entered information in the request, without the need to submit the request. Extends the Application File [sys_metadata] table.

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Tables installed (continued)

Table	Description
Document Revision [sn_lg_contracts_contract_draft]	Stores the first draft and other revisions of a contract document for a legal request.
Legal Contract [sn_lg_contracts_repository]	Stores all signed contract documents.
Sales Account [sn_lg_contracts_sales_account]	Stores information about sales accounts that belong to sales representatives.
Sales Account Import Set [sn_lg_contracts_sales_account_import_set]	Staging table for sales account records pulled from the Microsoft Dynamics CRM system.
Sales Dynamics Staging Data [sn_lg_contracts_sales_dynamics_staging_data]	Stores data imported from the CRM system. The data is pulled from the Microsoft Dynamics CRM system using a scheduled import set job.
Sales Opportunity [sn_lg_contracts_sales_opportunity]	Stores all opportunities associated with sales accounts. The data is pulled from the Microsoft Dynamics CRM system using a scheduled import set job.
Sales Opportunity Import Set [sn_lg_contracts_sales_opportunity_import_set]	Staging table for sales opportunity records pulled from the Microsoft Dynamics CRM system.
Sales Representative [sn_lg_contracts_sales_representative]	Stores sales representatives received from the CRM system. The data is pulled from the Microsoft Dynamics CRM system using a scheduled import set job that runs daily.
Sales Representative Import Set [sn_lg_contracts_sales_representative_import_set]	Staging table for sales representative records pulled from the Microsoft Dynamics CRM system.
Signer [sn_lg_contracts_signer]	Stores information of internal and external signatories.
Signer Config [sn_lg_contracts_signer_config]	Stores the mapping between an internal signatory and the participant field of a document template.
Signer Task	Stores all signatory information, including the order of signatories to sign the

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Tables installed (continued)

Table	Description
[sn_lg_contracts_signer_task]	contract document and current signature status a request.

Third Party Contract Review form

The Third Party Contract Review form is used to submit a legal request to the legal department to get the third-party contracts reviewed.

Submit a legal request for a third-party contract review.

Third Party Contract Review form

Field	Description
Is this for a Vendor, Customer, or Partner?	Third party type with whom the contract has to be signed.
Purpose of the contract	Subject and purpose of the contract.
Contract type	Type of contract. Only active contract types are listed in the field. For more information, see Create a contract type.
Upload contract document	Contract document to be reviewed by the legal department.
Company legal name	Legal name of the third party with whom the contract has to be signed.
Expected completion date	Date by which the contract review has to be completed.
Other party legal point of contact name	Name of the person from the third party who is the point of contact.
Other party legal point of contact email	Email address of the point of contact.

Word Template New Record form

The Word Template New Record form is used to create document template.

Word Template New Record form

Field	Description
Name	Unique name for the contract template.
Table	Table to which you want to associate the contract template.
Category	Document category to which you want to associate the contract template.
Document	The document from which you want to import template field mapping. The selected document should be a Microsoft Word (.docx) document and should have valid content controllers. For more information, see Add content controls in a Microsoft Word document.

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Word Template New Record form (continued)

Field	Description
Template date format	Format in which you want the date to appear when an agent previews the document, or generates the attachment.
Template language	Select a language from the drop-down list. **Note:** Although this field is not marked as mandatory, it is required to process the template.
Contract Type	The type of contract that is generated using the word document template. For example, if you're creating a template for a non-disclosure agreement, you would select Non Disclosure Agreement as the contract type. **Note:** Although this field is not marked as mandatory, it is required to process the template.
State	The state is automatically set to Draft.
Application	Application to which the contract template belongs. This field is automatically set to the application scope in which you're creating the contract template.
Active	Option to make the template active and available for use.
Start date	Date on which the Word document template becomes valid. Providing a start date helps when maintaining multiple versions of same template. This field is available only when **Category** is selected.
End date	Date until which the Word document template is valid. Providing an end date helps when maintaining multiple versions of same template. If the values in the **Start date** and **End date** fields are empty the template will always be valid. **Note:** If you specify an end date, you must also specify a start date. This field is available only when **Category** is selected.

Legal Simple Privacy

The ServiceNow® Legal Simple Privacy application provides a mechanism to raise a Privacy Assessment request to resolve privacy related concerns.

As a legal requester, you can submit a **Privacy Assessment** request and track it.

As a legal fulfiller, you can collaborate in a centralized **Legal Counsel Center** to work on privacy assessment requests and resolve them.

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Explore Learn about the features and benefits of Legal Simple Privacy.	**Set up** Install the application, and set up practice areas, intake forms, and other configurations.
Request and Manage privacy assessment request Submit and track privacy assessment requests.	**Reference** Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore Legal Simple Privacy

The ServiceNow® Legal Simple Privacy provides a mechanism to raise a request for a privacy assessment to resolve privacy-related concerns.

Features

The features of this application include:

- The ability to submit a request for privacy assessment.
- Tracking of privacy assessment requests.

Benefits

The benefits of this application include:

- An easily accessed **Privacy Assessment** service through a service catalog to replace manual, unstructured email processes and tasks.
- Efficient collaboration with teams to resolve requests.

Configure Legal Simple Privacy

Configure the foundation data to enable submitting a privacy impact assessment request to the legal department.

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As an administrator, review the installed components and modify them or add new ones as applicable.

Create or modify a practice area

Set up the practice areas specific to law practices such as Intellectual Property, Privacy, or Compliance. Associate categories to the practice area and assign a legal department user as the practice area lead.

Create or modify a legal catalog category

Create catalog categories to group legal services that employees can use to find a specific legal service request on the Legal Service Portal.

Configure an external storage system for legal requests and legal matters

Configure an external storage system to store documents attached to the Legal Simple Privacy requests by the requester or the fulfiller, which enables your organization to have a centralized documentation management and retention policy.

Create or modify a response template for legal services

Configure a response template with a reusable message that legal fulfillers can use to send users quick and consistent messages through work notes, comments, emails, or chat conversations.

For chat response templates, you can specify a short name that can be used as a shortcut to present the response message to a user quickly.

Create an email notification

Create or modify email notifications that are sent when specific events occur,for example, when a request is assigned, closed, or canceled, or a message has been posted to request additional information.

Configuring the form layout

To track dispositions from Legal Simple Privacy requests, add the Legal Disposition [sn_lg_ops_legal_disposition] table as a related list to any Legal Simple Privacy Request form.

Install Legal Simple Privacy

Install the a Legal Simple Privacy (sn_lg_privacy) application if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

- Review the Legal Simple Privacy application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Ensure that the application Legal Request Management (sn_lg_ops) is installed before you install Legal Simple Privacy.

Role required: admin

About this task

The following items are installed with Legal Simple Privacy:

- Plugins
- Store applications

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- Roles
- Scheduled jobs
- Tables

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Simple Privacy (sn_lg_privacy) application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   The available versions are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

What to do next

(Optional) Reconfigure the forms in the application to use the new privacy assessment record producer, catalog category, and content taxonomy. For more information, see Reconfigure forms to use new components

Use the Legal Service Delivery Guided Setup to configure the application on your instance. To access Legal Service Delivery guided setup, navigate to **Legal Administration** > **Legal Guided Setup**. For more information about using the guided setup interface, see Using guided setup .

Reconfigure forms to use new components

As an administrator, after installing Legal Simple Privacy reconfigure forms to use the new privacy assessment record producer, catalog category, and content taxonomy.

Before you begin

Role required: admin

About this task

The privacy assessment legal request that was part of Legal Request Management has been moved to a new application Legal Simple Privacy. With the new application, new privacy assessment components are available for Legal Simple Privacy. You can reconfigure the intake forms to use the new privacy assessment record producer, catalog category, and content taxonomy depending on the following points.

- If you use the new privacy assessment components, you must redo any customizations you made to the previous forms.
- The previous privacy assessment components won't be enhanced for new functionalities.

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Procedure

1. Reconfigure the **Intake Form Privacy Assessment**.
   a. In the navigation filter, enter `sn_lg_ops_category.list`.
   b. From the list, select **Privacy Assessment**
   c. In the **Request record producer** field, select the Lookup using list icon ( )
   d. If you aren't able to edit the form in the current application scope, select the word **here** in the message at the top of the page.
   e. In the record producers list, select the Show/hide filter icon ( ).
   f. In the **choose field** field, select **Application**.
   g. In the condition field, select **is** if it is not displayed.
   h. Enter *`Legal Simple Privacy`* in the text box.
   i. Select the **Run** button.
   j. Select **Privacy Assessment** from the list of record producers that belong to the Legal Simple Privacy application.
   k. Select **Update**.
2. Reconfigure the catalog item for Catalog item categories.
   a. In the navigation filter, enter `sc_cat_item_category.list`.
   b. In the Catalog item categories list, locate **Privacy Assessment** and select the Preview this record icon ( ).
   c. Select **Open Record**.
   d. In the **Catalog item** field, select the Lookup using list icon ( ).
   If you are unable to edit the record, select **here** in the access message at the top of the form.
   e. In the catalog items list, select the show/hide filter icon ( ).
   f. In the **choose field** field, select **Application**.
   g. In the condition field, select **is** if it is not already displayed.
   h. Enter *`Legal Simple Privacy`* in the text box.
   i. Select the **Run** button.
   j. Select **Privacy Assessment** from the list of catalog items that belong to the Legal Simple Privacy application.
   k. Select **Update**.
3. Reconfigure the catalog item for Connected Content.

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a. In the navigation filter, enter `m2m_connected_content.list`.
The Connected Content Catalog Item: Privacy Assessment form is displayed.

b. In the **Catalog item** field, select the Lookup using list icon ( ).

c. In the catalog items list, select the show/hide filter icon ( ).

d. In the **choose field** field, select **Application**.

e. In the condition field, select **is** if it is not displayed.

f. Enter *`Legal Simple Privacy`* in the text box.

g. Select the **Run** button.

h. Select **Privacy Assessment** from the list of record producers that belong to the Legal Simple Privacy application.

i. Select **Update**.

Privacy assessment requests

Privacy assessment requests enables employees to seek services from the Legal Privacy department to resolve privacy-related concerns.

Submit a privacy assessment request

Submit a privacy assessment request for yourself or on behalf of another user to seek services from the legal department.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

If you have the Legal Virtual Agent Conversations application installed on your instance, you can submit a privacy assessment request through the Virtual Agent chat. For more information, see Legal Virtual Agent Conversations.

Procedure

1. Open privacy assessment intake form, using one of the following options.

Option	Description
Using Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **Legal** from the header. **c.** Select **Privacy and Data**. **d.** Select **Privacy Assessment**.
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**.

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Option	Description
	c. Select the expand icon + on **Legal Requests** from the left panel. d. Select **Privacy Requests**. e. Select **Privacy Assessment**.

2. On the Privacy Assessment form, provide a description of the project or initiative for which you need the privacy assessment and the project sponsor.
3. Indicate whether personal data is involved in the **Is personal data involved?** field.
4. If you have selected **Yes** to indicate that personal data is involved, fill in the details for additional fields as following.
5. Select **Submit**.

Result

- A privacy assessment request is created in the New state.
- The request is assigned to a group or user in the legal department based on the assignment rule set in the associated practice area. For more information, see Assignment rule to automatically assign legal requests or matters.
- If the administrator has configured notifications, you receive notifications about the progress of the request.

Update a privacy assessment request

Update request details, add comments, or upload documents in a privacy assessment request you submitted while it is still in the New or Assigned state.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **Legal services** from the header.
3. Select **My Requests** from the header.
4. Open your submitted privacy assessment request.
5. On the standard ticket page, review and edit the request details.
6. From the Actions menu, select **Edit Request**.
7. In the Variables form, modify the request details.
8. Select **Save**.
9. Select **Back** to return to the standard ticket page.
   The request is updated with the new information. The changes appear as comments in the Additional Comments section of the request.

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10. **Optional:** In the **Activity** tab, provide comments or more information about your request for the request fulfiller.
11. **Optional:** Manage documents supporting your request.

Option	Steps
If the Attachments tab is visible	○ To upload a new document, select the add attachment icon () and select a file. ○ To rename an attached file, select the ed it file name icon () and update the file name. ○ To remove an attached file, select the delete icon ().
If the Documents tab is visible	○ To upload a new document, select **Attach** and select a file. A link to the document is listed in the **Exter nal URL** column of the documents list. ○ To remove an attached file, select **Delete**. In the Delete document dialog box, select a document from the list, and then select **Delete**.

12. **Optional:** In the **Approvals** tab, view the approval details associated with the request.

> **Note:** The **Approvals** tab appears only when the privacy assessment request or an attachment has approval records.

Assign a privacy assessment request

Assign a legal privacy assessment request to yourself or to someone in your assignment group.

Before you begin

Role required: sn_lg_simple_priva.privacy_fulfiller

About this task

When an employee submits a legal request, it is automatically assigned to a group or user in the legal privacy department. The assignment is done based on the assignment rules configured for the intake form of the associated practice area. If the request is assigned to a legal group, any member from the group can triage the request themselves or assign it to another member of the group. For more information, see Assignment rule to automatically assign legal requests or matters.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ().
3. In the **Legal Requests** section, select **Unassigned**.
4. In the list of unassigned requests, open a request by selecting its request number.
5. **Optional:** Update the **Assignment group permission** to change the permission level of the legal request for the users.

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- **No Access**: Only the practice area lead, group manager, and user in the **Assigned to** field can access the legal request and assign it to one of the members in the assignment group.
- **Read**: All members from the assignment group can only view the legal request. This option is the default permission level.
- **Edit**: All members from the assignment group can view and work on the legal request. The **Assigned To** field becomes optional if this option is set.

6. Based on the permission option, assign the request to yourself or to another member from the assigned group.
   - To assign the request to yourself, select **Assign to me**.
   - To assign the request to another member, on the **Details** tab, select a user in the **Assigned to** field and select **Save**.

Result
The state of the request updates to Assigned.

What to do next
The assigned user can start working on the legal request. For more information, see Work on a legal request.

Cancel a privacy assessment request

Cancel a privacy assessment request if it is no longer necessary.

Before you begin
Note: You can cancel a privacy assessment request regardless of its state.

Role required: sn_lg_ops.legal_user

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.
2. Select **View all** from the **My Requests** panel.
3. Open your submitted privacy assessment request.
4. From the Actions menu, select **Cancel Request**.
5. In the Confirm request cancellation dialog box, provide the reason for the cancellation in the **Comments** field.
6. Select **Confirm Cancellation**.
   The request is canceled and the cancellation comments appear in the Additional Comments section of the request.

   Any associated active flows are terminated. Any pending approval record is also canceled and a comment is posted in the Additional Comments section of the approval record.

Legal Simple Privacy Reference

Reference topics provide additional information about the lists and forms that you use in Legal Simple Privacy.

Components installed with Legal Simple Privacy

Several types of components are installed with activation of the Legal Simple Privacy application, including user roles.

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Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

User roles installed with Legal Simple Privacy

Role title [name]	Description	Contains roles
sn_lg_simple_priva.privacy_fulfiller	Provides fulfiller access for working on assigned privacy requests and matters.	sn_lg_ops.legal_user
sn_lg_simple_priva.privacy_admin	Application-specific system administrator role for the Legal Simple Privacy application, which provides administrative access for the application and full access to the underlying data.	• sn_lg_simple_priva.privacy_fulfiller • sn_lg_simple_priva.privacy_config
sn_lg_simple_priva.privacy_config	Provides access to configure data for the Legal Simple Privacy application such as search sources.	None

Tables

Tables installed with Legal Simple Privacy

Table	Description
Privacy and Data Security [sn_lg_ops_privacy_and_data_security]	Stores the details of a privacy assessment request.
Privacy and Data Security [sn_lg_matter_privacy_and_data_security]	Stores the details of any legal matters created.

Legal Simple Compliance

The ServiceNow® Legal Simple Compliance suite provides prebuilt legal workflows to submit and manage legal compliance requests.

The Legal Simple Compliance includes the following applications:

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- Gifts and Entertainment Compliance: Manage disclosures related to gifts and entertainment when employees give or receive them from internal or external parties to ensure they are in accordance with company policies.
- Legal Conflict of Interest: Manage the disclosure, approval, and registry of conflicts of interest that might arise from employees having competing interests or loyalties.
- Legal Stock Preclearance: Manage stock preclearance requests in accordance with your company's stock preclearance policy.

Install Legal Simple Compliance

Install the Legal Simple Compliance application to offer prebuilt workflows for various legal compliance needs. It enables you to manage legal compliance requests.

Before you begin

Review the Legal Simple Compliance (sn_lg_simplecompl) application listed in the ServiceNow® Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

When you install the Legal Simple Compliance application, the following applications are installed along with the other dependent applications and plugins if they aren't already installed:

- Gifts and Entertainment Compliance
- Legal Conflict of Interest
- Legal Stock Preclearance

Note: You can also install these applications separately.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Simple Compliance (sn_lg_simplecompl) application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   The available versions are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Gifts and Entertainment Compliance

The ServiceNow® Gifts and Entertainment Compliance enables you to manage disclosures from employees giving or receiving gifts or entertainment to internal or external parties to ensure they comply with company policies.

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Get started

Explore	Configure	Use
 Learn about the features and benefits of Gifts and Entertainment Compliance.		 Use Predictive intelligence for Legal Service Delivery
Manage	**Reference**	
 Manage gifts and entertainment disclosures	 Get details about components such as roles, fields, tables, and properties.	

Troubleshoot and get help

- Ask questions and explore other resources for Gifts and Entertainment Compliance in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore Gifts and Entertainment Compliance

The Gifts and Entertainment Compliance application enables you to manage disclosures and its approval arising from employees giving or receiving gifts or entertainment.

Gifts and Entertainment Compliance overview

Gifts and Entertainment Compliance enables you to streamline the giving and receiving of gifts and entertainment as per the configured gift policies. You can create and manage gift policies according to your organizations policies.

Disclosure requests are auto-approved when the value of disclosure is within the limits configured in the gift policy. This expedites the approval process, so you get quick responses.

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Gifts and Entertainment Compliance users

Users

User	Description
Gifts and entertainment administrator	Administers Gifts & Entertainment application with full access to the underlying data.
Gifts and entertainment configurator	Manages gifts and entertainment policies.
Gifts and entertainment fulfiller	Works on Gifts & Entertainment disclosure requests with access to all disclosure records.

Gifts and Entertainment Compliance workflow

1. The Gifts and entertainment configurator defines a gift policy.
2. An employee with legal user role submits a gift or entertainment disclosure request.
   - If a policy is configured and the value of gift or entertainment disclosure is within the permissible limits, the request is auto-approved.
   - If a policy is configured and the value of gift or entertainment disclosure is not within the permissible limits, the request is sent for manager's approval.
   - If there is no policy configured, the request is sent for manager's approval.
3. After manager's approval the request is sent to the members of Legal - Gifts Compliance group for approval.
4. Any one of the members of the Legal - Gifts Compliance group approves the disclosure request.
5. The manager or Legal - Gifts Compliance group members can reject the approval which will result in the request being rejected.

Gifts and Entertainment Compliance benefits

Gifts and Entertainment Compliance benefits

Benefit	Feature	Users
Configure gift policies in accordance with the organization's policies.	Gifts and Entertainment Compliance	Configurator
Use the gifts and entertainment workflow to submit disclosure	Gifts and Entertainment Compliance	User
Approve or reject the disclosure request	Gifts and Entertainment Compliance	Manager and fulfiller

What to explore next

To learn more about configuring and using Gifts and Entertainment Compliance, see:

- Configure Gifts and Entertainment Compliance
- Requesting legal clearance for gifts and entertainment

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- Managing gifts and entertainment disclosure requests
- Gifts and Entertainment Compliance reference

Configure Gifts and Entertainment Compliance

Configure the foundation data required for managing the gift and entertainment disclosure requests.

As an administrator, you can review the installed components and modify them or add new ones as applicable.

- Approver group for managing Gifts and Entertainment Compliance requests
- Gift policies for Gifts and Entertainment Compliance.
- Notifications to inform different stakeholders at different stages of a gift and entertainment disclosure requests.

Install Gifts and Entertainment Compliance

You can install the Gifts and Entertainment Compliance application (sn_lg_gifts) if you have the admin role.

Before you begin

Note:

The Gifts and Entertainment Compliance application is installed automatically when you install the Legal Simple Compliance suite.

Gifts and Entertainment Compliance requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

The following items are installed with Gifts and Entertainment Compliance:

- Store applications
- Roles
- Flows
- Tables

For more information, see Components installed with Gifts and Entertainment Compliance.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Gifts and Entertainment Compliance plugin (sn_lg_gifts) using the filter criteria and search bar.

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You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Configure gift policy for Gifts and Entertainment Compliance

Configure a gift policy in accordance with your organization's policy. This policy will outline the conditions under which approval is required.

Before you begin

Ensure that the Gifts and Entertainment Compliance application scope is selected.

Role required: sn_lg_gifts.gifts_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Gifts Admin** > **Gift Policies**.
2. Select **New**.
3. On the form, fill in the fields:

   For description on the field values, see Gift Policies form.

4. Click **Save**.

Configure approval workflow for Gifts and Entertainment Compliance

Review the flows installed with the Gifts and Entertainment Compliance application and configure them to align to your company's policy.

Before you begin

Ensure that the Gifts and Entertainment Compliance application scope is selected.

Role required: sn_lg_gifts.gifts_config

About this task

Gifts and Entertainment Compliance uses the Gifts Approval flow to trigger multi-level approvals when an employee submits a gifts and entertainment disclosure request

The flows are built using ServiceNow Workflow Studio, so make sure you're familiar with the Flow Designer basics.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Find the *`Gifts Approval`* and click the name of the flow to open.
3. Modify the trigger to set the conditions for the flow to trigger, and actions to add or update the approval levels.

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For information on how to create or modify flows, see Create a flow.

4. Click **Save**.
5. Test the flow by clicking **Test**.

   For more information, see Test a flow.

6. If not already active, click **Activate** to enable the flow.

Requesting legal clearance for gifts and entertainment

Employees who engage in giving or receiving gifts and entertainment can submit a disclosure and obtain the legal clearance for their transaction.

Submit a gifts and entertainment disclosure

Submit a disclosure to obtain the legal clearance for gifts and entertainment.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center** > **Legal services** > **Ethics and compliance**.
2. Select **Gifts & Entertainment Disclosure**.
3. **Note:** For description on the field values, see Gift and entertainment disclosure form

   On the form, fill in the fields and click **Submit**.

Result

- A gifts and entertainment disclosure request is created in the New state. If the value of the disclosure is within the maximum amount allowed, the request is auto-approved and the state is updated to Approved.
- The approval flow is triggered under the following conditions.
  - There are no gift policies defined or there are no active policies.
  - The value of the disclosure is more than the maximum amount allowed.
  - The external company name is not available in the list and was manually entered.
- The Standard Ticket page displays the following tabs to perform different tasks:
  - Activity: Track the activity history of the request and post messages for the fulfiller working on the request.
  - Attachments or Documents: Upload and manage the documents in the legal request.

    Note: If the external storage option is enabled, the **Documents** tab is displayed. Otherwise, the **Attachments** tab is displayed.

  - Request details: Review request details.

Managing gifts and entertainment disclosure requests

As a member of the Legal - Gifts Compliance group, review gifts and entertainment disclosure requests from employees and approve or reject them.

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Use the Legal Counsel Center to manage gifts and entertainment disclosure requests.

Approve or reject a gifts and entertainment disclosure request

Approve or reject a gifts and entertainment disclosure request assigned to you or a Legal - Gifts Compliance group of which you're a member.

Before you begin

Role required: sn_lg_gifts.gifts_fulfiller or sn_lg_ops.request_fulfiller

About this task

The *Gifts Approval* flow available in the base system, automatically routes your gifts and entertainment disclosure request through multiple approval levels. Once your request gets approved, it moves on to the next level.

Note: If the approval is assigned to an approval group, any member from the group can approve or reject the request.

Procedure

1. Open the approval request

Method	Steps
From Legal Counsel Center list	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center**. **b.** Select the list icon ( ). **c.** In the **Lists** tab, under **My Work**, click **Items Pending Approval**. **d.** In the Items Pending Approval list, open a request by clicking the request number in the **Approving** column.
From Legal Counsel Center landing page	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center**. **b.** Select **View All** on the Pending approval widget **c.** Select the request for approval.
From Employee Center	**a.** Navigate to **All** > **Self Service** > **Employee Center** **b.** On the menu bar, click the **My Tasks**. **c.** Under the Open tab, select the request for approval

2. In the **Approvers** tab, click **Requested** in the **State** column to open the approval form.
3. Approve or reject the request.
   - To approve the gifts and entertainment disclosure request, click **Approve**.
   - To reject the gifts and entertainment disclosure request, click **Reject**.

Result

The approval status of the request is updated in the Approvers tab.

The following table shows the results of approve and reject actions on the approval request.

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Results of actions on the approval request

Approve	Reject
• The state of the current approval level in the request updates to Approved. • If available, the request advances to the next approval level and is assigned to an approver or approver group set in the approval level. The state of the next approval is set as Requested. • If the current approval is the last in the approval flow, the approval moves to the Approved state. The legal request status changes to Approved.	• The state of the current approval level in the request updates to Rejected. • All the subsequent approval levels in the approval flow are skipped. • The legal request status updates to Rejected. • The comments for rejection posted by the approver is added to the request.

Update a submitted gifts and entertainment disclosure request

Update request details, add comments, or upload documents in a gifts and entertainment disclosure request you submitted while it is still in the New state. You can cancel a submitted request irrespective of its state.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Self Service** > **Employee Center**.
2. Open your submitted legal request from the **My Requests** option on the header menu.
3. On the Standard Ticket page, review and edit the request details, manage attachments, or cancel the request.

Action	Steps
Modify the request details	**Note:** This option is available only if the request is in the New state. **a.** From the Actions menu, select **Edit Request**. **b.** In the Variables form, modify the request details. **c.** Click **Save**. **d.** Click **Back** to return to the Standard Ticket page. The gifts and entertainment disclosure request is updated with the new information.
Cancel the request	**a.** From the Actions menu, select **Cancel Request**. **b.** In the Confirm request cancellation dialog box, provide the reason for the cancellation in the **Comments** field and click **Confirm Cancellation**.

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Action	Steps
	The request is canceled and the cancellation comments appear in the Activity tab of the request. Any associated active flows are terminated. Any pending ap proval record is also canceled and a comment is posted in the Activity tab of the approval record.

4. **Optional:** In the **Activity** tab, provide comments or more information about your request for the request fulfiller.
5. **Optional:** Manage documents supporting your request.

Option	Steps
If the Attachments tab is visible	○ To upload a new document, select the add attachment icon (📎) and select a file. ○ To rename an attached file, select the ed it file name icon (✎) and update the file name. ○ To remove an attached file, select the delete icon (✖).
If the Documents tab is visible	○ To upload a new document, select **Attach** and select a file. A link to the document is listed in the **Exter nal URL** column of the documents list. ○ To remove an attached file, select **Delete**. In the Delete document dialog box, select a document from the list, and then select **Delete**.

Gifts and Entertainment Compliance reference

Reference topics provide additional information about the components, lists and forms that you use in Gifts and Entertainment Compliance.

Components installed with Gifts and Entertainment Compliance

Several types of components are installed with installation of the Gifts and Entertainment Compliance, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

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Roles

Roles installed with Gifts and Entertainment Compliance

Role title [name]	Description	Contains roles
Gifts and Entertainment administrator [sn_lg_gifts.gifts_admin]	Provides the administrative permissions for Gifts & Entertainment app and full access to the underlying data.	• sn_lg_gifts.gifts_fulfiller • sn_lg_gifts.gifts_config
Gifts and Entertainment Configurator [sn_lg_gifts.gifts_config]	Provides access to configure data for the Gifts & Entertainment application.	sn_lg_ops.legal_user
Gifts and Entertainment Fulfiller [sn_lg_gifts.gifts_fulfiller]	Provides fulfiller access to all Gifts & Entertainment disclosure records.	sn_lg_ops.legal_user

Flows

Flows installed with Gifts and Entertainment Compliance

Flow	Description
Gifts Approval	This flow controls the multi-level approvals for gift and entertainment disclosure requests.

Tables

Tables installed with Gifts and Entertainment Compliance

Table	Description
Gift Policy [sn_lg_gifts_policy_configuration]	Stores gifts and entertainment policy records.

Gift Policies form

Use the Gift Policies form to add policy in accordance with your organization's policy.

Participant form

Field	Description
Name	Display name of the gift policy.
Description	Description of the policy.
Category	The category of transaction. **Note:** You can add subcategories as per your requirement. For more information, see Add a subcategory for the intake form.

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Participant form (continued)

Field	Description
Transaction type	The type of transaction between the parties. • Giving: When the requester of disclosure is giving a gift or entertainment. • Receiving: When the requester of disclosure is receiving a gift or entertainment.
Recipient type	Recipient that is either internal or external to the organization. • Internal - within the company: An employee within the company who is giving or receiving gifts or entertainment. • External party: A user outside of the company who is giving or receiving gifts or entertainment.
Maximum amount allowed	The maximum permissible value for gifts or entertainment. An approval flow is triggered when the submitted disclosure exceeds the maximum amount allowed.
Effective from date	Date from which the policy is active.
Effective to date	Date on which the policy becomes inactive.
Active	Option for if the gift policy is active.

Gift and entertainment disclosure form

Use the Gift Policies form to add policy in accordance with your organization's policy.

Participant form

Field	Description
Select the category for gifts or entertainment	Category of the transaction. **Note:** You can customize the options by adding subcategory. For more information, see Add a subcategory for the intake form.
Provide additional information	Additional information when the category selected in **Others**.
Are you giving or receiving any gifts or entertainment?	The type of transaction. • Giving: When the requester is giving a gift or entertainment. • Receiving: When the requester is receiving a gift or entertainment.
Select the recipient - is it someone within the company or an external party?	Recipient that is either internal or external to the organization.

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Participant form (continued)

Field	Description
	• Internal organization: An employee within the company who is giving or receiving gifts or entertainment. • External party: A user outside of the company who is giving or receiving gifts or entertainment.
Provide the approximate event date	Date of the transaction.
Provide the approximate value for the gift or entertainment	Value of the gift or entertainment.
Fields when recipient is within the company	
Employee name	Employee who is giving or receiving gifts or entertainment.
Fields when recipient is an external party	
Company name	Name of the company
Company personnel accepting or offering gifts and entertainment	Name of the company personnel giving or receiving.
A government entity or government personnel?	Indicates whether the disclosure involves a government entity or personnel.
A relative of government personnel?	Indicates whether the disclosure involves a relative of government personnel.
Affiliated with a state-owned enterprise (such as a public-funded university or hospital)?	Indicates whether the company involved is state-owned.

Gifts and Entertainment Compliance notifications

Notifications alert you of changes in gift and entertainment disclosure request and actions to be taken. Use the notifications received to work on the requests.

Gifts and Entertainment Compliance notification details

Name	Recipient	Tile
G&E Request Approval - Approved/rejected	Requested for, Assigned to	Your request was ${state}.

Legal Conflict of Interest

Legal Conflict of Interest enables you to manage the disclosure, approval, and registry of conflict of interest that might arise from employees having competing interests or loyalties. Employees can submit disclosures using the conversational interface of Now Assist in Virtual Agent or intake form available in the Employee Center.

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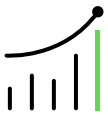
Explore  Learn about how employees, paralegal staff, and lawyers use Legal Conflict of Interest.	**Configure**  Set up approver groups, flows, and notifications.	Submit COI request form Employee Center Use  Use Legal Conflict of Interest
Analytics and Reporting  Coordinate work and improve processes with preconfigured dashboards	**Reference**  Get details about components such as roles, tables, plugins, and store applications that are installed.	

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Legal Conflict of Interest

Learn more about the Legal Conflict of Interest application through a sample workflow and review the benefits that it can provide.

Legal Conflict of Interest overview

The ServiceNow® Legal Conflict of Interest enables you to manage the disclosure, approval, and registry of conflict of interest that might arise from employees having competing interests or loyalties. Employees can submit disclosures using the conversational interface of Now Assist in Virtual Agent or intake form available in the Employee Center. The Requests are evaluated against predefined risk factors to calculate an overall risk score. Based on this score, requests are routed to the appropriate approval workflow for faster resolution.

Note: The conversational intake functionality is available only when you have installed and configured Legal Service Delivery - Prime that is a paid application. For more information, see Now Assist for Legal Service Delivery (LSD).

For more information on how to submit the requests using the two methods, see Submit COI request form Employee Center and Submit COI request using Now Assist conversational intake

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Risk assessment

When an employee submits a COI disclosure—either through the Employee Center intake form or via Now Assist in Virtual Agent conversational intake—the risk assessment utility evaluates the submission against a set of predefined risk factors. Each risk factor contributes to an overall risk score, which determines the risk level (Low, Medium, or High) and the corresponding approval routing.

The risk level determines whether the request needs approval or can be auto-approved.

- Low risk — The request is auto-approved, and both the employee and their manager receive notification. No approvers are engaged.
- Medium risk — The approval chain is triggered. The request is routed to the first-level approvers as determined by the conflict type (for example, Manager and Legal Compliance for an Outside Employment disclosure).
- High risk — The full approval chain is triggered, including escalated approvers. The request is routed through all approvers defined for the conflict type (for example, Manager, Legal Compliance, and Board Approval for a Board Service fiduciary role).

Risk factors support three evaluation types that determine how each condition is assessed:

- Condition: Evaluates the disclosure against rule-based field-value conditions. Use this type for deterministic, field-based evaluations.
- Skill: Uses an AI skill to analyze the disclosure content and return a risk score. This evaluation type is available only when you have installed and configured Legal Service Delivery - Prime plugin (sn_lg_ai_prime), which is a paid application.
- Subflow: Executes a Flow Designer subflow for complex logic, external integrations, or multi-step processing.

The risk assessment process generates a report that provides legal fulfillers visibility into the evaluation. The report includes request details, risk level and score, detailed risk factor analysis with reasoning, and all submitted request variables. Legal fulfillers can review the report from the Risk Assessment tab of the legal request to take quicker decisions.

A notification is sent to the requesters before the expiry of the validity of their COI disclosure records. If the requesters need an extension, they should review and resubmit a request to get the legal clearance for the extended period.

For more information, see Configure risk assessment.

Approval workflow

The approvers and the number of approval levels differ based on the conflict type.

Following illustration shows the approvers and number of approval levels for each conflict type. For example, the Outside Employment conflict type has two approval levels. The first-level approver is the manager of the requester, and the second-level approver is the legal compliance group.

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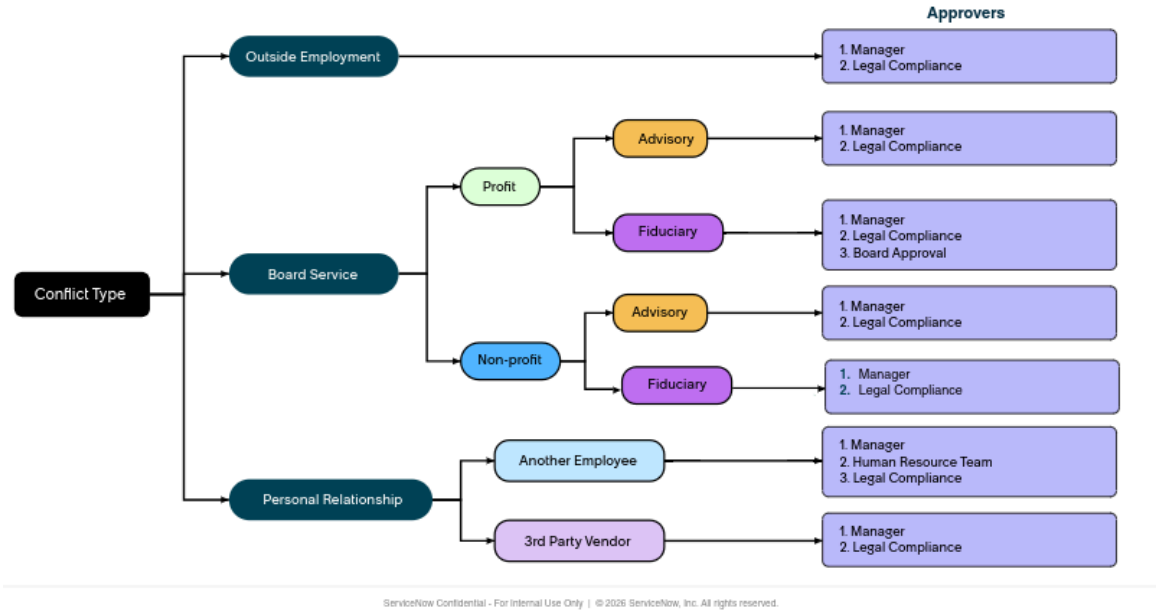
Conflict of Interest approval flow



The administrator can modify the approval flow in the following ways:

- Change the number of levels of approval required.
- Add or modify approvers or approver groups at each level of approval.

For more information, see Configure flows for Legal Conflict of Interest.

Legal Conflict of Interest users

Users

User	Description
Legal conflict of interest Admin	Configures intake forms and approval workflows.
Legal conflict of interest fulfiller	Works on fulfilling the COI requests.
Legal conflict of interest read	Has read-only access to view all COI disclosure records.

Legal Conflict of Interest workflow

1. The legal user submits a new conflict of interest disclosure request by selecting the appropriate conflict type.
2. The risk assessment evaluates the request and assigns a risk level (Low, Medium, or High) based on the calculated risk score.
3. The conflict of interest disclosure request enters a predefined approval workflow depending on the risk level.
4. The conflict of interest fulfiller reviews the risk assessment report.
5. The conflict of interest fulfiller either approves or rejects the submitted request.

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6. The final decision is communicated to the employee via email notification.
7. A corresponding record is automatically generated in the system.

Legal Conflict of Interest benefits

Legal Conflict of Interest benefits

Benefit	Feature	Users
Submit COI request using natural language from the conversational interface of Now Assist in Virtual Agent. This is available only when you have installed and configured Legal Service Delivery - Prime that is a paid application.	Submit COI request using Now Assist conversational intake	Legal user
Submit COI request from the Employee Center	Submit COI request form Employee Center	Legal user
Risk assessment with configurable risk factors and score to automate approval workflow	Configure risk assessment	Legal fulfiller
Risk assessment reports with detailed scoring and analysis enable legal fulfillers to make faster, informed approval decisions.	View risk assessment details	Legal fulfiller
Configurable approval flows in accordance with the organization's Conflict of Interest (COI) policy.	Configure flows for Legal Conflict of Interest	Legal administrator

What to explore next

To learn more about configuring and using Legal Conflict of Interest, see:

- Configure Legal Conflict of Interest
- Using Legal Conflict of Interest
- Legal Conflict of Interest reference

Configure Legal Conflict of Interest

Configure the foundation data required for managing the conflict of interest requests.

As an administrator, you can review the installed components and modify them or add new ones as applicable.

- Approver group for managing conflict of interest requests
- Flows for Legal Conflict of Interest
- Notifications to inform different stakeholders at different stages of a conflict of interest request
- To submit conflict of interest request using conversational intake from Now Assist in Virtual Agent, install and configure Legal Service Delivery - Prime that is a paid application.

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Install Legal Conflict of Interest

You can install the Legal Conflict of Interest application (sn_lg_coi) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Note:

- The Legal Conflict of Interest application is installed automatically when you install the Legal Simple Compliance suite.
- The Legal and Contracts Common Utilities (sn_lco_cmn) application is automatically installed when you install Legal Conflict of Interest.

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Conflict of Interest application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Legal Conflict of Interest:

- Plugins
- Store applications
- Roles
- Tables
- Business Rules

For more information, see Components installed with Legal Conflict of Interest.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Conflict of Interest application (sn_lg_coi) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   In the list, next to the **Install** button, the versions that are available are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

6. Select **Install**.

What to do next

To submit conflict of interest request using conversational intake from Now Assist in Virtual Agent, install and configure Legal Service Delivery - Prime that is a paid application.

Use the Legal Service Delivery Guided Setup to configure the application on your instance.

To access Legal Service Delivery guided setup, navigate to **Legal Administration** > **Legal Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Configure risk assessment

Configure the risk assessment to automatically evaluate conflict of interest disclosures and assign risk levels that determine approval routing.

Before you begin

Role required: sn_lco_cmn.config

About this task

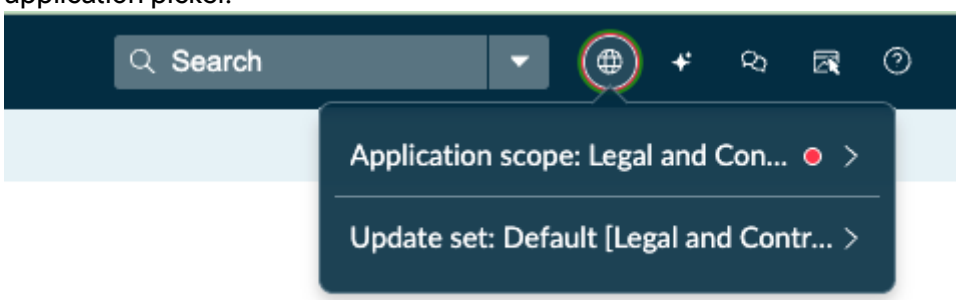
The risk assessment functionality evaluates each request against a set of risk factors to calculate a risk score. The risk score determines the risk level (Low, Medium, or High), which drives the approval workflow. Low-risk disclosures are auto-approved; Medium and High-risk disclosures enter the approval workflow with approvers determined by the conflict type.

The risk assessment record defines the risk factors, the table it applies to, and the conditions under which it runs.

COI Risk Assessment is available in the base system to evaluate the COI requests. You can also configure risk assessments to evaluate other compliance requests.

Procedure

1. Set the application scope to **Global** or **Legal and Contracts Common Utilities** in the application picker.



2. Navigate to **All** > **Legal and Contracts Common Utilities** > **Risk Assessment**.
3. Select **New**.
4. On the form, fill in the fields.

Risk assessment form fields

Field	Description
Name	The name of the risk assessment.

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Field	Description
Table	The table the assessment applies to.
Active	Select the check box to activate the risk assessment.
Application	Displays the application scope.
Order	Execution order when multiple assessments exist. Lower numbers run first.
Report template	Select a report template to generate risk assessment reports.
Applies to	Conditions under which this assessment runs.

5. Right-click on the form header and select **Save**.
   The risk assessment is saved and the related list for Risk factors appear

What to do next

Add risk factors to define the criteria the risk assessment functionality evaluates a request. For more information, see Configure risk factors.

Configure risk factors

Configure risk factors to define the criteria the risk assessment functionality evaluates a request. Each risk factor uses one of three evaluation types: Condition, Skill, or Subflow.

About this task

Risk factors define the criteria evaluated when scoring a request. Each factor is assigned a weight that reflects its impact on the overall risk score. The utility supports three evaluation types:

- Condition: Evaluates the disclosure against rule-based conditions defined in risk factor conditions. Each condition tests a specific field value and assigns a score when the condition is met. Use this type for deterministic, field-based evaluations.
- Skill: Uses an AI skill to evaluate the disclosure. Use this type when the evaluation requires natural language understanding or analysis that cannot be expressed as a simple field condition.

  Note:

  - The skill is available in the base system to evaluate an COI request only when you have installed and configured Legal Service Delivery - Prime that is a paid application.
  - You can access the skill by navigating to **Now Assist Skill Kit** > **Home** > **Custom skills** and selecting Legal Risk Evaluator Prompt.

  For more information, see Now Assist for Legal Service Delivery (LSD).

- Subflow: Executes a Flow Designer subflow to evaluate the disclosure. Use this type when the evaluation requires complex logic, external integrations, or multi-step processing.

Before you begin

Role required: sn_lco_cmn.config

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Procedure

1. Add risk factor using any of the following methods.
   - Add risk factor from the risk assessment record
     - Navigate to **All** > **Legal and Contracts Common Utilities** > **Risk Assessment**.
     - From the Risk factors related list, select **New**.
   - Add a risk factor record directly
     - Navigate to **All** > **Legal and Contracts Common Utilities** > **Risk factor**.
     - Select **New**.
2. On the form, fill in the following fields.

Risk factor fields

Field	Description
Name	A descriptive name for the risk factor.
Risk assessment	The risk assessment where the risk factor will be evaluated. When you create a risk factor from the risk assessment record it will be populated with the risk assessment name.
Active	Select the check box to include this factor in risk evaluations.
Description	An explanation of what the condition evaluates and why it contributes to the risk score.
Weight	The scoring weight assigned to this factor. Higher weights indicate greater impact on the overall risk score.

3. Configure evaluation type.

Evaluation type	Steps
Subflow	A Subflow reference field appears. Select the Flow Designer subflow that exe cutes custom evaluation logic and returns a risk score in the Subflow field.
Condition	○ Right-click on the form header and select **Save**. ○ In the Risk factor conditions related list, se lect **New**. ○ In the **Name** field, enter descriptive name. ○ In the **Table** field, select the table on which the condition is evaluated. ○ In the **Risk factor** field, select parent risk factor. It is auto-populated when creating from the related list. ○ Select the **Active** check box to activate the condition. ○ In the **Order** field, enter the evaluation or der.

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Evaluation type	Steps
	○ In the **Score** field, assign a score assigned when this condition is met. ○ In the **Applies to** filter, define filter conditions using the condition builder. Example: Is it a true governance board for an organization is Advisory Board.
Skill	A Skill reference field appears. Select the AI skill that analyzes the disclosure content and returns a risk score.

4. Select **Submit**.

Result
The risk factor is configured and active. When the risk assessment utility evaluates a request, it processes each active risk factor based on its evaluation type: The scores from all active risk factors are aggregated to produce the overall risk score, which determines the risk level (Low, Medium, or High) and the corresponding approval routing.

Configure flows for Legal Conflict of Interest

Review the flows installed with the Legal Conflict of Interest application and configure them to align with your business needs.

Before you begin
Ensure that the Legal Conflict of Interest application scope is selected.

Role required: sn_lg_coi.coi_admin and admin

About this task
Legal Conflict of Interest uses the following flows:

- COI Approval flow: Triggers multi-level approvals when an employee submits a conflict of interest request
- Scheduled Flow to Deactivate COI: Triggers to validate and deactivate any existing conflict of interest disclosure record that has the end date before the current date. The flow triggers at a scheduled time.

The flows are built using ServiceNow Workflow Studio, so make sure you're familiar with the Flow Designer basics.

Procedure
1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. Find the *COI Approval flow* and click the name of the flow to open.
3. Modify the trigger to set the conditions for the flow to trigger, and actions to add or update the approval levels.

   For information on how to create or modify flows, see Create a flow.
4. Click **Save**.
5. Test the flow by clicking **Test**.

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For more information, see Test a flow.

6. If not already active, click **Activate** to enable the flow.

Using Legal Conflict of Interest

Employees who engage in activities that could potentially conflict with their primary employment duties can disclose these potential conflicts and obtain the legal clearance by submitting a request.

Overview of Legal Conflict of Interest workflow

Employees can submit disclosures using the intake form in the Employee Center or through the conversational interface of Now Assist in Virtual Agent.

1. The legal user submits a new conflict of interest disclosure request by selecting the appropriate conflict type.
2. The risk assessment evaluates the request and assigns a risk level (Low, Medium, or High) based on the calculated risk score.
3. The conflict of interest disclosure request enters a predefined approval workflow depending on the risk level.
4. The conflict of interest fulfiller reviews and either approves or rejects the submitted request.
5. The final decision is communicated to the employee via email notification.
6. A corresponding record is automatically generated in the system.

Submit COI request form Employee Center

Submit a request to obtain the legal clearance before you involve in any activity that might pose a risk of potential conflict with the primary employer duties.

Before you begin
Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you are using Legal Service Portal, you can submit a legal request by navigating to the Legal Service Portal portal and selecting a request from the **Service Catalog**.

2. Select **Legal services** from the header.
3. Select **Browse Legal services**.
4. Search for the conflict of interest disclosure request item.
5. Click **Conflict of Interest Disclosure**.
6. In the **Conflict type** field, select the type of conflict.
   The following options are available to select:

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- **Board Service**: A conflict of interest when a board member's interest might compromise the organization's interest or derive a financial or personal gain from a direct or indirect relationship.
- **Outside Employment**: A conflict of interest when employees take up a second job that might be in conflict with the primary job duties.
- **Personal Relationship**: A conflict of interest when employees having personal relationships also have a professional relationship within the organization.

Based on the selection, more fields appear to fill in the required information.

7. On the form, fill in the fields and click **Submit**.

Result

- A conflict of interest disclosure request is created in the New state. The risk assessment utility evaluates the submission against a set of predefined risk factors. Each risk factor contributes to an overall risk score, which determines the risk level (Low, Medium, or High) and the corresponding approval routing. The risk level determines whether the request needs approval or can be auto-approved.
- Approvers assigned at each approval level can approve the request. Once the approval flow gets triggered, the state of the request updates to Work in Progress.
- The Standard Ticket page displays that has the following tabs to perform different tasks:
  - Activity: Track the activity history of the request and post messages for the fulfiller working on the request.
  - Attachments or Documents: Upload and manage the documents in the legal request.

    Note: If the external storage option is enabled, the **Documents** tab is displayed. Otherwise, the **Attachments** tab is displayed.

  - The approval details appear under the **Approvals** tab on the Standard Ticket page.
  - Request Details: Review request details.

Update an existing conflict of interest disclosure request

Update an existing conflict of interest disclosure request to obtain the legal clearance again before it expires. You might want to get fresh approvals for an extension of the period or for the revised conditions that might pose a risk of potential conflict with the primary employer duties.

Before you begin

Role required: sn_lg_ops.legal_user

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you're using Legal Service Portal, open a request by navigating to the Legal Service Portal portal and selecting **My Requests** from the header.

2. Select **Legal services** from the header.
3. Select **My Requests** from the header.
4. Open the conflict of interest disclosure request.
5. From the Actions menu, select **Edit Request**.

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6. On the form, update the fields and click **Submit**.

   Note: You cannot update a few fields on the form, and so they show up as inactive.

7. **Optional:** Manage documents supporting your request.

Option	Steps
If the Attachments tab is visible	○ To upload a new document, select the add attachment icon (📎) and select a file. ○ To rename an attached file, select the ed it file name icon (✏) and update the file name. ○ To remove an attached file, select the delete icon (✖).
If the Documents tab is visible	○ To upload a new document, select **Attach** and select a file. A link to the document is listed in the **Exter nal URL** column of the documents list. ○ To remove an attached file, select **Delete**. In the Delete document dialog box, select a document from the list, and then select **Delete**.

Result

The conflict of interest disclosure request is updated and the state is set as New. The Activities stream shows the details of the updated fields. The request is sent for approval. The approval flow for the selected conflict type controls the request to go through the required number of approval levels. Approvers assigned at each approval level can approve the request. After the approval flow gets triggered, the state of the request updates to Work in Progress.

The approval details appear under the **Approvals** tab on the Standard Ticket page.

Approve or reject a conflict of interest disclosure request

Approve or reject a conflict of interest disclosure request assigned to you or a legal user group of which you're a member.

Before you begin

Role required: sn_lg_ops.coi_fulfiller or sn_lg_ops.request_fulfiller

About this task

Before approving or rejecting a request, you can review the risk assessment results to understand the risk level and the factors that contributed to the score. The risk level (Low, Medium, or High) is displayed in the request header, and detailed evaluation results are available in the Risk responses tab. For more information, see View risk assessment details.

The multi-level approval flow for a conflict of interest disclosure request is automated through the *COI Approval flow*. The flow controls the request to advance to the next approval level when approved at one approval level. After the final-level approval, a conflict of interest disclosure record is created. The approval or rejection of the request and the end date specified in the request determines the state of the newly created disclosure record.

For more information on approval flow, see Conflict of Interest – Approval flow.

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Note: If the approval is assigned to an approval group, any member from the group can approve or reject the request.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **My Work**, click **Items Pending Approval**.
4. In the Items Pending Approval list, open a request by clicking the request number in the **Approval for** column.
5. If it's an existing request that is updated by the requester, review and validate the changes from the Activities stream.
6. View risk assessment details by viewing the Risk level field on the secondary header and navigating to Risk responses tab.
7. In the **Approvers** tab, click **Requested** in the **State** column to open the approval form.
8. Approve or reject the request.
   - To approve the conflict of interest disclosure request, click **Approve**.
   - To reject the conflict of interest disclosure request, click **Reject**.

Result

The approval status of the request is updated in the Approvers tab.

The following table shows the results of approve and reject actions on the approval request.

Results of actions on the approval request

Approve	Reject
• The state of the current approval level in the request updates to Approved. • If available, the request advances to the next approval level and is assigned to an approver or approver group set in the approval level. The state of the next approval is set as Requested. • If the current approval is the last in the approval flow, the approval moves to the Approved state. The legal request status changes to Closed. • For a new request, a corresponding conflict of interest disclosure record is created. For an existing request, the related conflict of interest disclosure record is updated. The state of the conflict of interest disclosure record is based on the following conditions:	• The state of the current approval level in the request updates to Rejected. • All the subsequent approval levels in the approval flow are skipped. • The legal request status updates to Closed. • The comments for rejection posted by the approver is added to the request. • For a new request, a corresponding conflict of interest disclosure record is created in the Rejected state. • For an existing request, the related conflict of interest disclosure record is updated without changing its existing state.

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Results of actions on the approval request (continued)

Approve	Reject
○ If the end date of the record is empty or later than the approval date, the state is Active. ○ If the end date of the record is prior to the approval date, the state of the record is Inactive.	

Update an existing conflict of interest disclosure record

You can update an existing conflict of interest disclosure record to change the validity period or the status of the record.

Before you begin

Role required: sn_lg_ops.coi_fulfiller

About this task

You can only update conflict of interest disclosure records that have the conflict status as Active.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Open a conflict of interest disclosure record that you want to review or update.
3. On the form, update the fields as required.
   You can update only the following fields that are available based on the conflict type of the disclosure record:
   - **Start date**: Available in Board Service and Outside Employment conflict types.
   - **End date**: Available in Board Service and Outside Employment conflict types.
   - **Conflict status**: Available in all conflict types.
4. Click **Update**.

View risk assessment details

Review the risk assessment results for a conflict of interest disclosure, including the overall risk score, risk level, individual risk factor responses, and the risk assessment report.

Before you begin

Role required: sn_lg_ops.coi_fulfiller or sn_lg_ops.request_fulfiller

About this task

When an employee submits a COI disclosure, the risk assessment evaluates the request against configured risk factors and assigns an overall risk score and risk level. As a fulfiller, you can view the assessment results to understand why a request was scored at a particular level, review individual risk factor responses, and access the risk assessment report.

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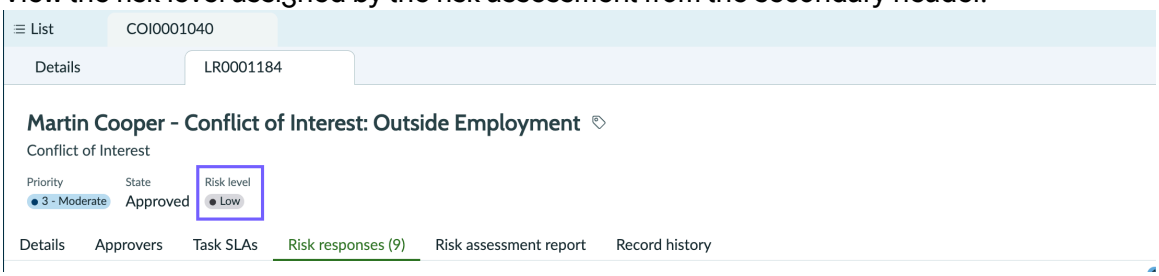
Procedure

1. View risk level and risk responses from the legal request.

   a. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.

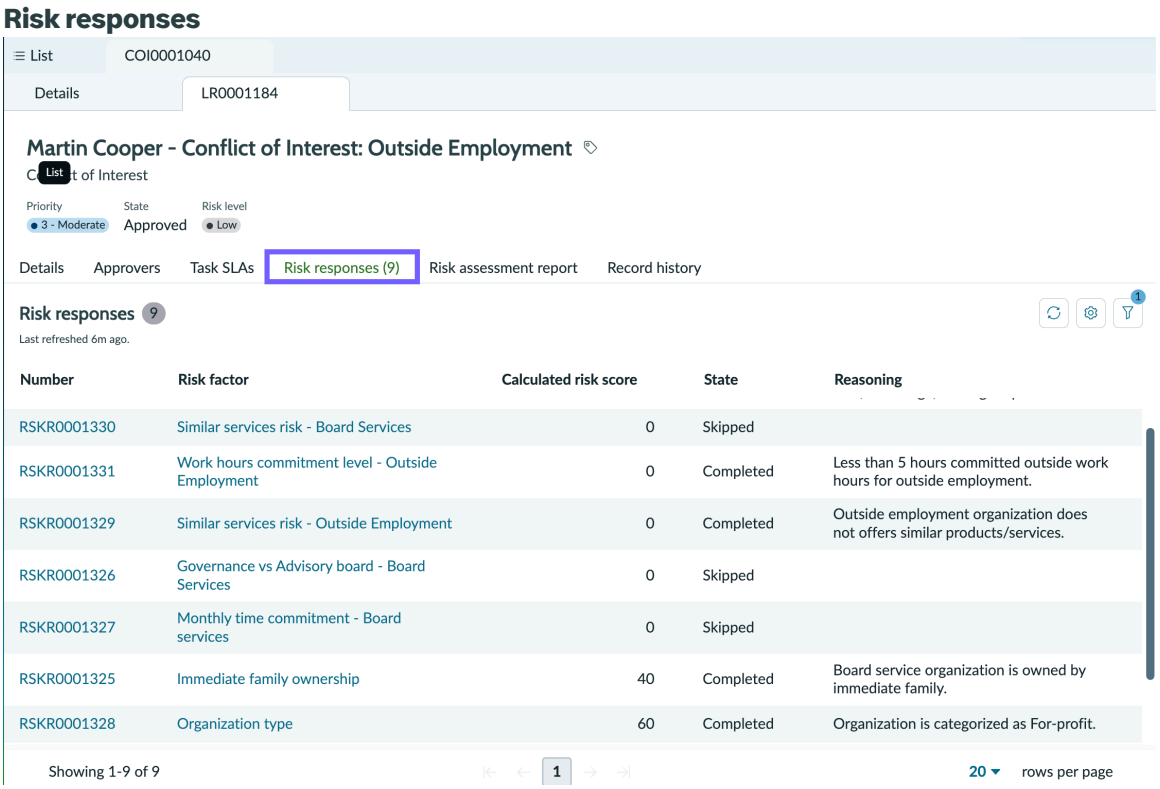
   b. Open the COI disclosure request.

   c. View the risk level assigned by the risk assessment from the secondary header.



2. View risk responses.

   a. Select the **Risk responses** tab to view the individual risk factor evaluation results.
   The Risk responses tab displays a list of all risk factor evaluations performed for this request.
   The count in the tab label indicates the number of risk factors evaluated.



   b. Select the risk response to see details.

3. Select the **Risk assessment report** tab to detailed report.

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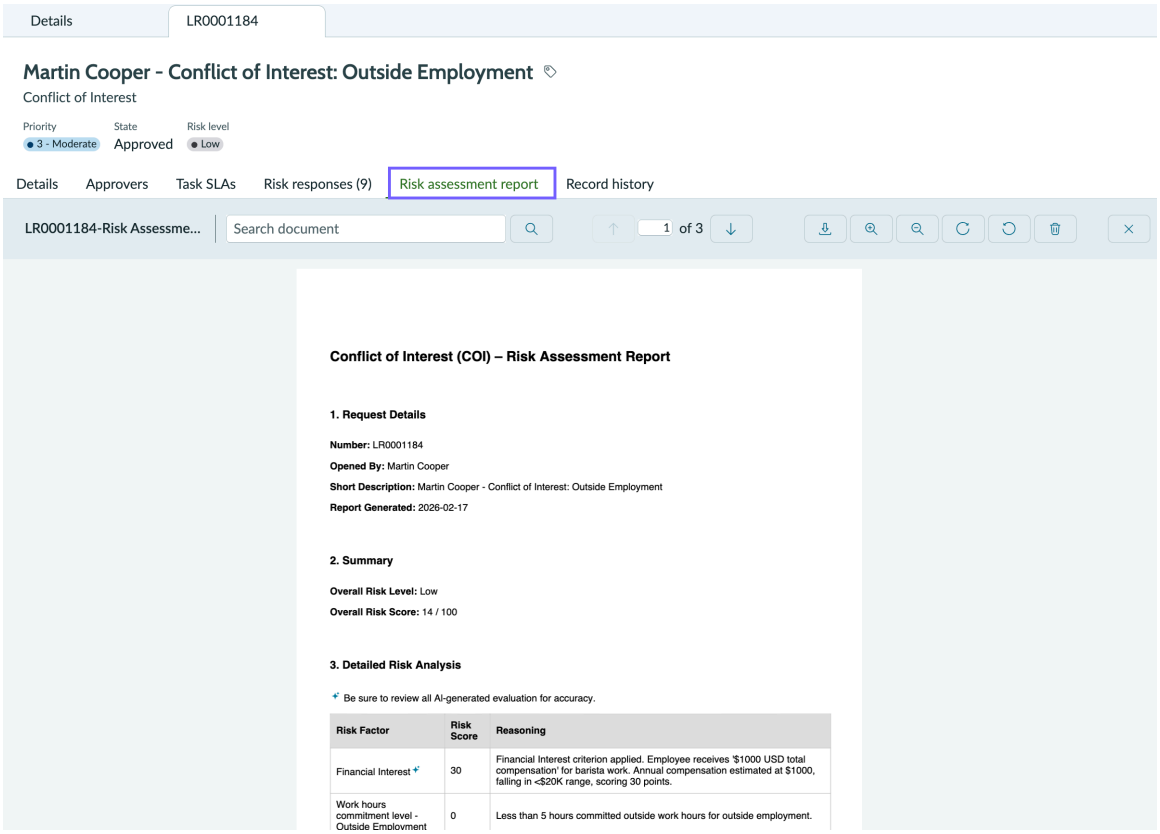

4. View overall risk assessment score.
   a. Navigate to **All** > **Legal and Contracts Common Utilities** > **Overall Risk Assessment Scores**.
   b. Select the record associated with the legal request number for which you want to view the overall risk assessment.

Legal Conflict of Interest reference

Reference topics provide additional information about the lists and forms that you use in Legal Conflict of Interest.

Components installed with Legal Conflict of Interest

Several types of components are installed with installation of the Legal Conflict of Interest, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles

Roles installed with Legal Conflict of Interest

Role title [name]	Description	Contains roles
COI Admin [sn_lg_coi.coi_admin]	Provides the administrative permissions for Conflict of Interest app and full access to the underlying data.	• sn_lg_coi.coi_fulfiller • sn_lco_cmn.admin

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Roles installed with Legal Conflict of Interest (continued)

Role title [name]	Description	Contains roles
COI Fulfiller [sn_lg_coi.coi_fulfiller]	Provides fulfiller access to all conflict of interest disclosure records.	• sn_lg_coi.coi_read • sn_lco_cmn.risk_reader
COI Read [sn_lg_coi.coi_read]	Provides the read-only access to view all conflict of interest records.	sn_lg_ops.legal_user
Legal and Contracts Common Utilities configurator [sn_lco_cmn.config]	Provides write permission on the Legal and Contracts Common Utilities records	• decision_table_admin • sn_doc.writer
Legal and Contracts Common Utilities administrator [sn_lco_cmn.admin]	Provides administrator permission on the Legal and Contracts Common Utilities records	• sn_lco_cmn.config • sn_lco_cmn.risk_reader
Legal and Contracts Common Utilities reader [sn_lco_cmn.risk_reader]	Provides read permission on the Legal and Contracts Common Utilities records	None

Scheduled jobs

Schedules jobs installed with Legal Conflict of Interest

Scheduled job	Description
Send Reminder Email to COI Requestor	The job checks for the active conflict of interest disclosure records that have the end date in the next 30 days. For all such records, it sends reminder notifications to requesters to update any changes in their conflicts records.

Flows

Flows installed with Legal Conflict of Interest

Flow	Description
COI Approval flow	This flow controls the multi-level approvals for conflict of interest disclosure requests.
Scheduled Flow to Deactivate COI	This scheduled flow runs daily to check for the active conflict of interest disclosure records for which the end date has passed the current date. For all such records, it updates the state from Active to Inactive.

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Tables

Tables installed with Legal Conflict of Interest

Table	Description
Conflict of Interest Associated Requests [sn_lg_coi_coi_request]	Stores the mapping of legal requests submitted by the user and the conflict of interest disclosure records.
Conflict of Interest Disclosure [sn_lg_coi_conflict_of_interest]	Stores conflict of interest disclosure records.
Risk factor conditions [sn_lco_risk_factor_conditions]	Stores the risk factor condition records used to evaluate a risk factor.
Risk factor [sn_lco_risk_factor]	Stores the risk factor records associated with risk assessment.
Overall risk assessment score sn_lco_overall_risk_assessment_score	Stores the overall risk assessment score records.
Risk assessment [sn_lco_risk_assessment]	Store the risk assessment records.
Risk response sn_lco_risk_response	Store the risk response records for the evaluated risk factors.

Legal Stock Preclearance

Legal Stock Preclearance enables you to manage stock preclearance requests complying with the company's stock preclearance policy. You can set up trading windows, manage an access persons list, and approve or reject stock preclearance requests.

Explore	Set up	Request
Learn about how employees and stock approvers use Legal Stock Preclearance.	Set up trading windows, trading holidays, access persons, and other configurations.	Submit and track stock preclearance requests.

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Manage	Analytics and Reporting	Reference
Manage stock preclearance approval requests.	Coordinate work and improve processes with preconfigured dashboards.	Get details about components such as roles, tables, plugins, and store applications that are installed.

Request apps on the Store

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Legal Stock Preclearance

Legal Stock Preclearance application keeps you in compliance with your organization's stock preclearance policy through automation of submission and approvals of preclearance requests.

Employees of your organization on designation as an access person, such as directors and executives, must obtain the preclearance approval from the legal department before they can trade in securities of the organization.

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Legal Stock Preclearance workflow

WORKFLOW:

Stock Preclearance

Legal Administration > Stock Preclearance Admin

Even with an open trading window, some employees need pre-approval to trade in company securities due to their access to material, non-public information. For instance, a sales person working on a major account or an employee that has access to company strategy (like VP and above).

Set up the following items in the application:



- 1) Access persons list
- 2) Trading windows
- 3) Trading exchange holidays

After setup, here's what the workflow looks like:

Trading window opens

Employee submits request

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Configure Legal Stock Preclearance

Configure the foundation data for your stock preclearance process to enable employees to submit preclearance approval requests before they trade in the securities.

As an administrator, you can review the installed components and modify them or add new ones as applicable.

- Legal stock approvers
- Fiscal calendar
- Trading windows
- Trading holidays
- Access Persons list
- Notifications

Install Legal Stock Preclearance

You can install the Legal Stock Preclearance application (sn_lg_stock_cp) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Note:

The Legal Stock Preclearance application is installed automatically when you install the Legal Simple Compliance suite.

- Verify that the application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Stock Preclearance application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following components are installed with installation of the Legal Stock Preclearance application:

- Plugins
- Store applications
- Roles
- Tables
- Business Rules

For more information, see Components installed with Legal Stock Preclearance.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Stock Preclearance application (sn_lg_stock_cp) using the filter criteria and search bar.

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You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.

3. In the *Application installation* dialog box, review the application dependencies.

   Dependent plugins and applications are listed that are already installed, will be installed, or must be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Stock Preclearance.

4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

What to do next

Use the Legal Service Delivery Guided Setup to configure the application on your instance.

To access Legal Service Delivery Guided Setup, navigate to **Legal Administration** > **Legal Guided Setup**. For more information about using the guided setup interface, see Using guided setup.

Set up a trading window

Set up a trading window for a period in which certain designated employees of the organization are permitted to trade in the securities of your organization.

Before you begin

Role required: sn_lg_stock_cp.stock_config

About this task

During an open trading window, the designated employees such as directors and executives can trade in compliance with your organization's Insider Trading Policies.

Procedure

1. Navigate to **All** > **Legal Administration** > **Stock Preclearance Admin** > **Trading Windows**.
2. Click **New** to set up a trading window.
3. On the form, fill in the fields.

Trading Window form

Field	Description
Short description	Unique short description for the trading window.
Fiscal quarter	Fiscal quarter for which the trading window is open.
Opening date	Date the trading window opens.
Closing date	Date the trading window closes.
Request submission start date	Date from which you can start submitting preclearance requests.

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Field	Description
Earnings date	Date of your company's earnings.
Approval validity days	Number of days a stock preclearance approval is valid for.
Exclude trading holidays	Option to exclude trading on holidays that fall within the trading window. Selecting this option extends the approval validity days by the number of holidays during the trading period. **Note:** By default, weekend days are excluded for calculating the validity due date. For example, say that a trading window opens from January 1 to January 31 and you have set the approval validity days to 10 days. If January 24 and 25 are trading holidays, then, ○ If the preclearance is approved on January 8, the approval validity is until January 22 (10 days from January 8 + 4 days of two weekends). ○ If the preclearance is approved on January 15, the approval validity is until January 31 instead of January 25 (10 days + 4 days of two weekends + 2 holidays from January 15). ○ If the preclearance is approved on January 21, the approval validity is until February 6 (10 days + 2 holidays from January 20 + 4 days of two weekends). However, as the trading window closes earlier than the validity of approval, the last date is January 31 rather than February 6.

4. Click **Submit**.

Add trading holidays

Add trading holidays during which the trading is closed.

Before you begin
Role required: sn_lg_stock_cp.stock_config

About this task
A trading holiday might impact the stock preclearance approval validity period based on the **Exclude trading holidays** field's setting in the trading window. For more information, see Set up a trading window.

Procedure
1. Navigate to **All** > **Legal Administration** > **Stock Preclearance Admin** > **Trading Holidays**.
2. Click **New**.
3. Enter the calendar year for which you want to add trading holidays and click **Submit**.
4. Open the calendar year you created to add trading holidays.
5. In the Holidays related list, click **New**.
6. On the form, fill in the fields.

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Holiday form

Field	Description
Short description	Unique short description for the trading holiday, such as New Year, Labor Day, or Christmas.
Date	Date of holiday.

7. Click **Submit**.

Manage access persons list

Add users who have access to non-public information regarding the trade of securities of your organization.

Before you begin

Role required: sn_lg_stock_cp.stock_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Stock Preclearance Admin** > **Access Persons**.
2. To add a user to the access persons list,
   a. Click **Add Users**.
   b. In the Add User dialog box, select users from the list to add as access persons.
   The list shows only active users from the Users [sys_user] table.
   a. Scroll down to the Actions on selected rows menu and choose **Add Users to Access List**.
   The selected users are added to the Access Persons list.
3. To modify a user's information in the Access Persons list,
   a. Click the preview icon ( ) and click **Open Record**.
   b. On the form, update the fields.

Access Persons form

Field	Description
User	Name of the user.
Entry date	Date on which the user was added to the access persons list. This field is not available for modification.
Exit date	Date the user is automatically removed from the access persons list.
Sec 16 officer	Option for marking the user as a Section 16 officer.

   c. Click **Update**.

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Submitting Legal Stock Preclearance requests

Employees from different departments in your organization can submit stock preclearance requests complying with the company's stock preclearance policy

Submit a preclearance approval request

As a designated access person, submit a request to obtain the preclearance approval from the legal department before you can trade in the securities of your organization.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

You can submit a preclearance request during an open trading window period only if you are in the Access Persons list.

Procedure

1. Navigate to **All** > **Employee Center**.

   Note: If you are using Legal Service Portal, you can submit a legal request by navigating to the Legal Service Portal portal and selecting a request from the **Service Catalog**.

2. Select **Legal services** from the header.
3. Select **Browse Legal services**.
4. Search for the stock preclearance request item.
5. Click **Stock Preclearance**.
6. On the form, fill in the fields.

Stock Preclearance form

Field	Description
Transaction type	Type of securities transaction for which you need a preclearance approval. ○ Purchase ○ Sell ○ Transfer ○ Gift
Number of securities	Number of shares to trade.
Nature of securities	Type of shares for which you need a preclearance approval. ○ Open Market ○ ESPP (Employee Stock Purchase Plan) ○ ESOP (Employee Stock Option Plan) ○ RSU (Restricted Stock Unit)
Proposed transaction date	Date on which you want to perform the securities transaction. The date must be within the current trading window.

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Field	Description
Short description	Description for the preclearance approval.
I agree	Option to confirm your consent to trade in securities in accordance with your organization's insider trading policies.

7. Click **Submit**.

Result

- A preclearance approval request is created and assigned to the legal stock approvers group. If configured by the administrator, you get the notification about the progress of your request.

  Note:

  The approval details appear under the **Approvals** tab on the Standard Ticket page.

- When submitting the stock preclearance request as a Sec-16 officer, the **Subcategory** in the request is automatically set as Sec-16 Officer.
- The Standard Ticket page displays that has the following tabs to perform different tasks:
  - Activity: Track the activity history of the request and post messages for the fulfiller working on the request.
  - Attachments or Documents: Upload and manage the documents in the legal request.

    Note: If the external storage option is enabled, the **Documents** tab is displayed. Otherwise, the **Attachments** tab is displayed.

  - Request Details: Review request details.

Approve or reject a stock preclearance approval

As a member of the legal stock approvers group, approve or reject a stock preclearance approval request so that the requester can trade in the securities of the organization.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, under **My Work**, click **Items Pending Approvals**.
4. Open a stock preclearance approval request record by clicking **Requested**.
5. Approve or reject the stock preclearance approval request.
   - To approve the stock preclearance approval request, click **Approve**.

     The state of the approval request updates to **Approved**.

   - To reject the stock preclearance approval request, click **Reject**.

     The state of the approval request updates to **Rejected**.

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Result

- If you approve the stock preclearance approval request, the requester can perform the requested securities transaction within the current trading window. The approval is valid based on the approval validity days settings or the closing date of the current trading window, whichever is earlier.
- If you approve the request on a holiday, the approval validity starts from the next business day.
- If you reject the request, the requester cannot perform any securities transactions.

Legal Stock Preclearance reference

Reference topics provide additional information about the lists and forms that you use in Legal Stock Preclearance.

Components installed with Legal Stock Preclearance

Several types of components are installed with activation of the Legal Stock Preclearance application, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Demo data is available for this feature.

Roles

Roles installed with Legal Stock Preclearance

Role title [name]	Description	Contains roles
Stock Preclearance Administrator [sn_lg_stock_cp.stock_config]	Provides access to set up stock preclearance data such as trading windows, holidays, and access persons.	sn_lg_ops.legal_user

Tables

Tables installed with Legal Stock Preclearance

Table	Description
Access Persons [sn_lg_stock_cp_access_person]	Stores users designated as Access Persons to submit a stock preclearance request.
Calendar year [sn_lg_stock_cp_trading_year]	Stores calendar years used for setting up trading holidays for your organization during which no trading in securities is permitted.
Holiday [sn_lg_stock_cp_trading_holiday]	Stores the stock exchange trading holidays for your organization.
Trading Window	Stores the trading window details for stock preclearance requests.

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Tables installed with Legal Stock Preclearance (continued)

Table	Description
[sn_lg_stock_cp_trading_window]	
Trading Window Requests [sn_lg_stock_cp_trading_window_request]	Stores the trading window requests for stock preclearance requests.

Legal Hold Notification

The ServiceNow® Legal Hold Notification application helps organizations manage their legal obligations to preserve relevant information when a legal hold is issued. It enables you to submit a legal hold matter, add custodians, send notices, and close the legal hold matter, to ensure legal and regulatory compliance.

Get started

Explore



Learn about the workflow, user roles, features, and key benefits of Legal Hold Notification.

Configure



Install and configure Legal Hold Notification to efficiently manage the end-to-end legal hold process.

Use



Use the Legal Hold Notification to manage legal obligations by creating, issuing, and closing legal hold matters.

Reference



Get details about Legal Hold Notification components such as tables and other elements.

Troubleshoot and get help

- Ask questions and explore other resources for Legal Hold Notification in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

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Exploring Legal Hold Notification

Explore the Legal Hold Notification application to understand its workflow, user roles, and the key benefits it offers across your organization.

Legal Hold Notification overview

The The ServiceNow® Legal Hold Notification application helps organizations manage their legal obligations to preserve relevant information when a legal hold is issued. It enables you to submit a legal hold matter, add custodians, send notices, and close the legal hold matter, to ensure legal and regulatory compliance.

Legal Hold Notification users

Users

User	Description
Legal hold administrator	Manages the administrative processes for the Legal Hold Notification application.
Legal hold configurator	Handles the setup and management of Legal Hold Notification records.
Legal hold fulfiller	Responsible for managing legal hold notification requests, including creating notices and sending email notifications to custodians to ensure acknowledgment.
Custodian	Responsible for preserving potentially relevant data related to a legal hold matter and are held accountable for receiving and acknowledging the legal hold notice.

Legal Hold Notification workflow

The following workflow outlines the legal hold process, from creating to closing a legal hold notification matter.

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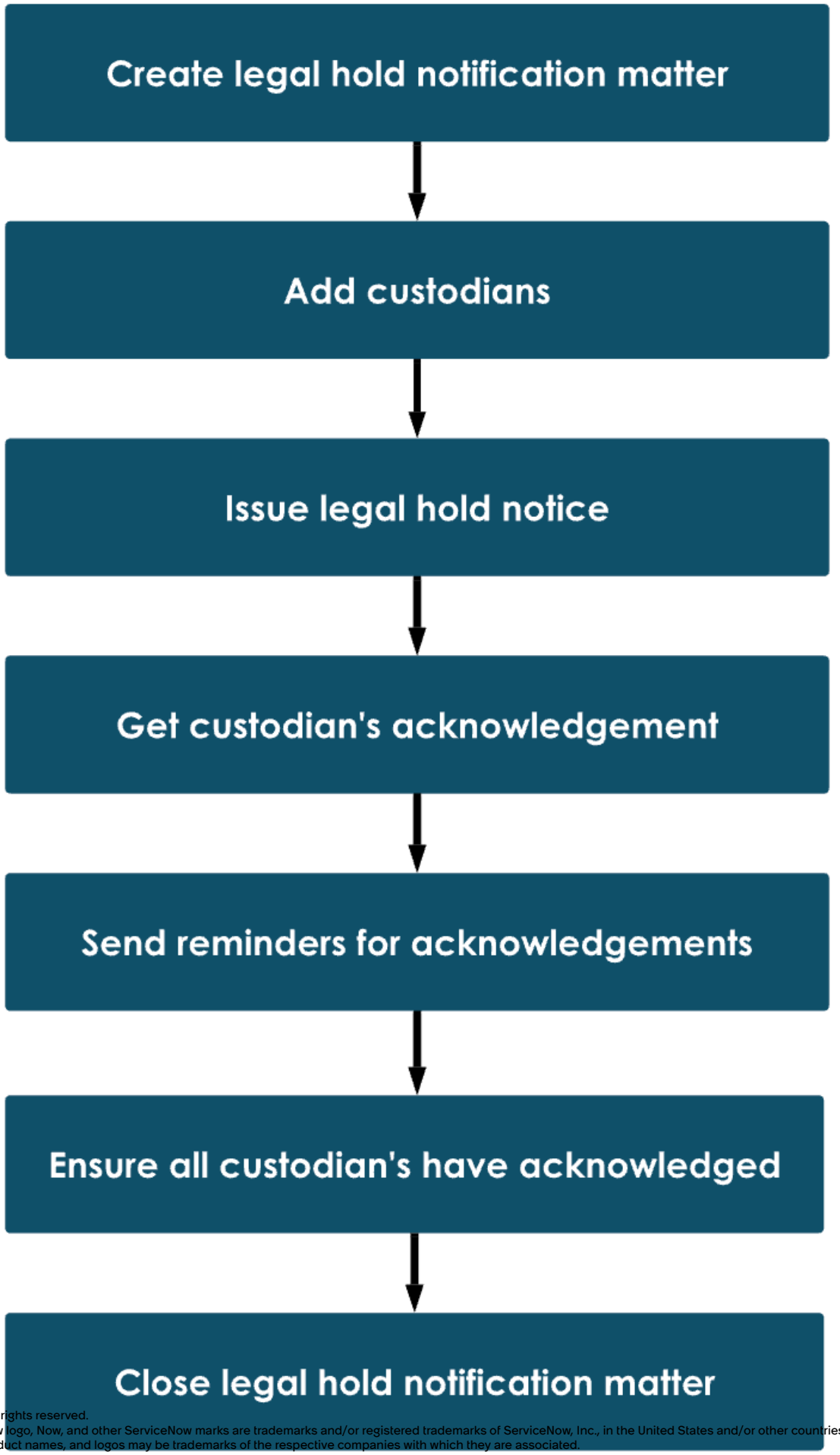
Legal Hold Notification End-to-End workflow



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1. A legal hold fulfiller submits a legal hold notification matter when a legal hold is issued.
2. A group manager or practice area lead assigns the matter owner (legal hold fulfiller) to the legal hold matter.
3. The legal hold fulfiller drafts the legal hold notice, adds custodians, and sends the notice to ensure that related data is preserved.
4. The custodians receive the legal hold notice and formally acknowledge its receipt.
5. The legal hold fulfiller tracks the custodian acknowledgment status and sends reminders to custodians who haven't acknowledged the notice.
6. The legal hold fulfiller confirms that all custodians have acknowledged the notice.
7. The legal hold fulfiller closes the legal hold notification matter when the legal hold is officially lifted.

Legal Hold Notification benefits

Legal Hold Notification provides the following benefits:

- Provides a streamlined legal hold workflow that simplifies processes and integrates smoothly with existing legal and corporate systems.
- Minimizes administrative effort in tracking legal hold status through the use of structured interfaces and dashboards.
- Enhances overall efficiency by reducing the time required to manage legal hold–related tasks.

What to explore next

To find out more about configuring and using Legal Hold Notification, see:

- Configure Legal Hold Notification
- Using Legal Hold Notification
- Legal Hold Notification reference

Configure Legal Hold Notification

Install and configure the Legal Hold Notification application for creating and managing legal hold notification matter.

Install Legal Hold Notification

Install the Legal Hold Notification plugin to be able to create a legal hold notification matter, add custodians, issue the legal hold notice, and close the legal hold notification matter.

Before you begin
To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task
The following items are installed with Legal Hold Notification:

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- Dependent store applications
- Roles
- Tables

For more information, see Components installed with Legal Hold Notification.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Hold Notification (sn_lg_hold) application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   The available versions are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

What to do next

If the Legal Counsel Center application hasn't been previously installed, you must install it to start using Legal Hold Notification. For more information, see Install Legal Counsel Center Workspace.

Assign the legal user role to a custodian

Assign the legal user role to a custodian who is responsible for preserving data related to a legal hold.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Search for and select the target user.
   If the user record does not exist, create it. For more information, see Create a user.
3. In the Roles related list, select **Edit**.
4. In the Collection list, search for and select the sn_lg_ops.legal_user role.

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5. Add the user to the Roles list by selecting the right arrow icon ( ) to add it to the **Roles List**.
6. Select **Save**.

Result
The user is assigned as the legal user role and can be added as a custodian when issuing a legal hold notice.

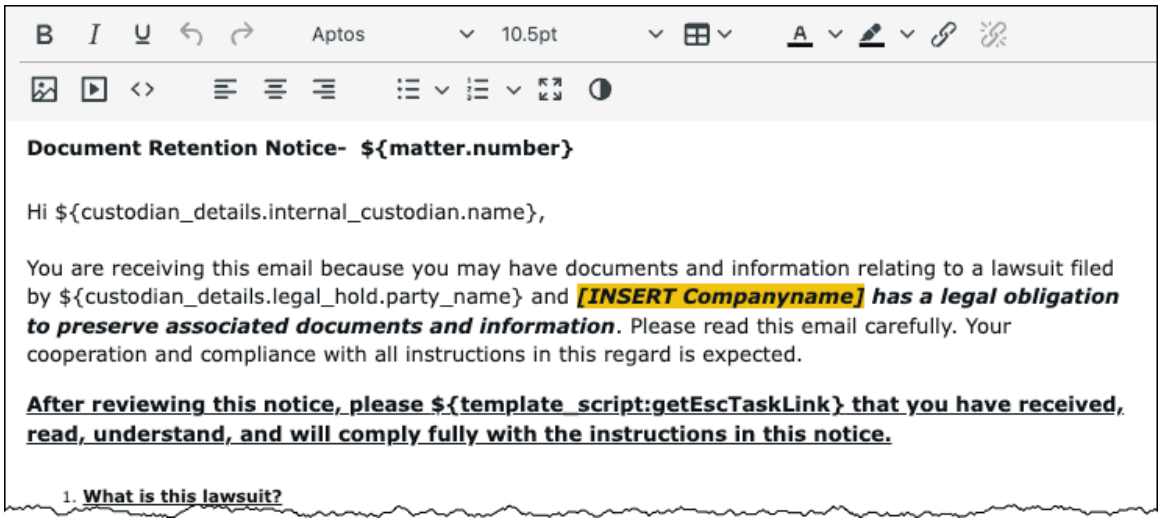
Customize an existing legal hold notice template

Customize the legal hold notice template available in the base system to align with your organizational requirements.

Before you begin
Role required: sn_lg_ops.legal_config

Procedure
1. Navigate to **All** > **Document Templates** > **All Document Templates**.
2. Search for and select **Legal hold notice**.
3. If a message appears about the application scope, select **here** to be able to edit the record.

   A legal hold notice opens in an editable format.



4. Customize the template by substituting your company's name for the placeholder text and adding any additional text you want to include.

   ⚠ **Warning:** Do not modify the JavaScript variables marked with ${ } in the legal hold template. Editing these variables might corrupt the template and prevent the legal hold notice from being generated.

5. Select **Publish**.

Result
A customized legal hold template is created.

Configure a new legal hold notice template

Configure a legal hold notice template to align with your organizational requirements.

Before you begin
Role required: sn_lg_ops.legal_config

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Procedure

1. Navigate to **All** > **Document Templates** > **All Document Template**.
2. Select **New**.
3. Select **HTML Document Template**.
4. On the form, fill in the fields.

HTML Template New record form

Field	Description
Name	Name of the template.
Application	The application to which the template belongs, which in this case is Legal Hold Notification. **Legal Hold Notification**.
Table	Table associated with the type of template, which in this case is sn_lg_matter_task. The table determines the available variables that can be used. **Note:** The tables that are listed are based on the application scope that is selected.

5. Fill in the remaining fields as needed.
   For more information, see Configure an HTML document template.
6. Select **Publish**.

Result
A new legal hold notice template is created.

Configure a restricted caller access privilege

Configure a restricted caller access privilege for the document templates application with a global scope to allow the legal matter application to perform read operations.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access**.
2. Set the application scope.
   a. Select the Application scope icon ( ).
   b. In the filter navigator, search for and select **Document Templates**.
3. In the **Restricted Caller Access Privileges** page, select **New**.
4. Enter the following field values.

Field	Value
Source Scope	Global

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Field	Value
Application	Document Templates
Source Type	Source Include
Target Scope	Document Templates
Status	Allowed
Target Type	Table: Document Templates
Description	Short description text.

5. Select **Submit**.

Using Legal Hold Notification

The Legal Hold Notification application enables organizations to issue, track, and manage legal hold notices efficiently.

If the Legal Counsel Center application hasn't been previously installed, you must install it to start using Legal Hold Notification. For more information, see Install Legal Counsel Center Workspace.

Submit a Legal Hold Notification matter

Create a Legal Hold Notification matter to initiate the process of preserving the data related to the legal hold when the legal hold is issued.

Before you begin

If the Legal Counsel Center application hasn't been previously installed, you must install it to start using Legal Hold Notification. For more information, see Install Legal Counsel Center Workspace.

Role required: sn_lg_hold.legal_hold_fulfiller or sn_lg_ops.legal_fulfiller

Procedure

1. Access the Legal Hold Notification matter intake form through either the Employee Center or the Legal Counsel Center.

Option	Description
Using Employee Center (sn_lg_hold.legal_hold_fulfiller)	**a.** Navigate to **All** > **Employee Center** **b.** Select **Legal services** from the header. **c.** In the **Ethics and compliance** category, select **Legal Hold Notification**.
Using Legal Counsel Center (sn_lg_ops.legal_fulfiller)	**a.** Navigate to **List** > **Matters** > **All** **b.** Select **New**. **c.** In the **Request type** pop-up window, select **Legal Hold Notification**. **d.** Select **Submit**.

2. On the Legal Hold Notification matter intake form, fill in the fields.

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Note: For a description of the field values, see Legal hold notification matter intake form.

3. Select **Submit**.

Result
A **Legal Hold Matter** is created.

In the **Legal Hold Matter** page, under the **Tasks** tab, a task is created with the initial state set to **Draft**.

In the **Custodians** tab, the custodian details are added.

Assign a matter owner

Assign a matter owner (fulfiller) for the legal hold matter to be responsible for managing it.

Before you begin
If the Legal Counsel Center application hasn't been previously installed, you must install it to start using Legal Hold Notification. For more information, see Install Legal Counsel Center Workspace.

Role required: admin

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Default lists** tab, navigate to **Matters** > **All**.
4. Select the legal matter from the list.
5. Update the **Assignment group permission** field value to **Read**.
6. In the **Matter owner** field, select the Search for Record icon ( ) and search for and select the fulfiller to be responsible for managing this legal hold matter.
7. Select **Save**.

Result
The legal matter state changes from New to Assigned.

A matter owner (fulfiller) is assigned to the legal hold matter.

Issue a legal hold notice

Issue the legal hold notice to the custodian to ensure timely preservation of relevant data.

Before you begin
Role required: sn_lg_hold.legal_hold_fulfiller

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Default lists** tab, navigate to **Matters** > **All**
4. Select the legal matter from the list.
5. Select **Start work**.

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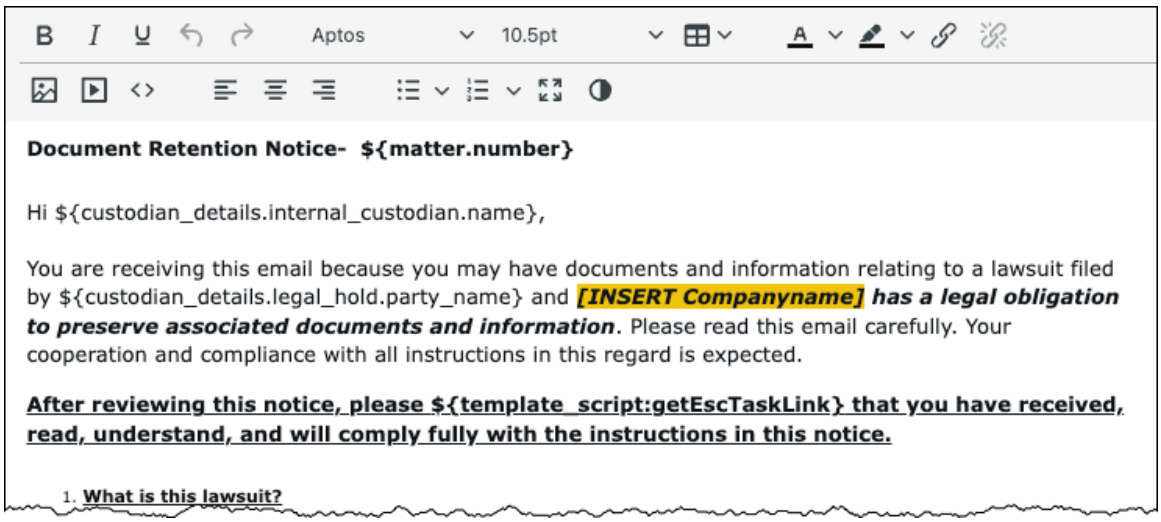
The legal matter state changes from Assigned to Work in progress.

6. In the legal matter page, select **Preview and issue hold**.
   The legal hold notice appears in the window.
7. Select **Edit**.

   A legal hold notice opens in an editable format.



8. Customize the notice by substituting your organization's company name for placeholder text and adding any additional text you want to include.

   ⚠ **Warning:** Do not modify the JavaScript variables marked with ${ } in the legal hold template. Editing these variables might corrupt the template and prevent the legal hold notice from being generated.

   If you need to revert changes, select **Discard changes**.
9. Select **Save and preview**.
10. Review the edited legal hold notice and select **Issue legal hold**.

Result

In the **Activity** section, a message is displayed as **Legal hold notice has been sent to X custodians**.

In the **Tasks** tab, the state of the task assigned to the custodian changes from Draft to Assigned.

A legal hold notice is issued to the custodian via email, with the fulfiller copied in the **Cc** field.

A copy of the legal hold notice sent to the custodian is attached under the **Artifacts** tab within the corresponding legal matter.

Add a new custodian to an existing legal hold matter

Add a new custodian to issue the legal hold notice if a user is later identified as responsible for preserving data relevant to the existing legal hold.

Before you begin

Role required: sn_lg_hold.legal_hold_fulfiller

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Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Default list** tab, navigate to **Matters** > **All**
4. Select the legal hold matter from the list.
5. In the **Custodians** tab, select **New**.
6. On the Create New Custodians form, in the **Custodian name** field, select the Search for Record icon ( ) and search for and select the custodian name.
   Only users with the custodian role are available in the list. For more information, see Assign the legal user role to a custodian.
7. On the form, fill in the remaining fields.

Create New Custodians form

Field	Description
Legal matter	Legal matter with which the custodian is associated. This field is automatically set to the parent matter number and a description.
Custodian email	Email of the custodian. This field is automatically set to the custodian's email when the custodian is selected.
Data sources	Data source type related to the legal hold matter such as documents, spreadsheets, presentations, emails, and attachments.

8. Select **Save**.
   - A new custodian is added under the **Custodians** tab.
   - A new task is created for a new custodian under the **Tasks** tab, with the initial state set to Draft.
9. Issue a legal hold notice to the newly added custodian.
   a. In the legal matter page, select **Preview and issue hold**.
   b. In the legal hold notice, select **Edit**.
   A legal hold notice opens in an editable format.

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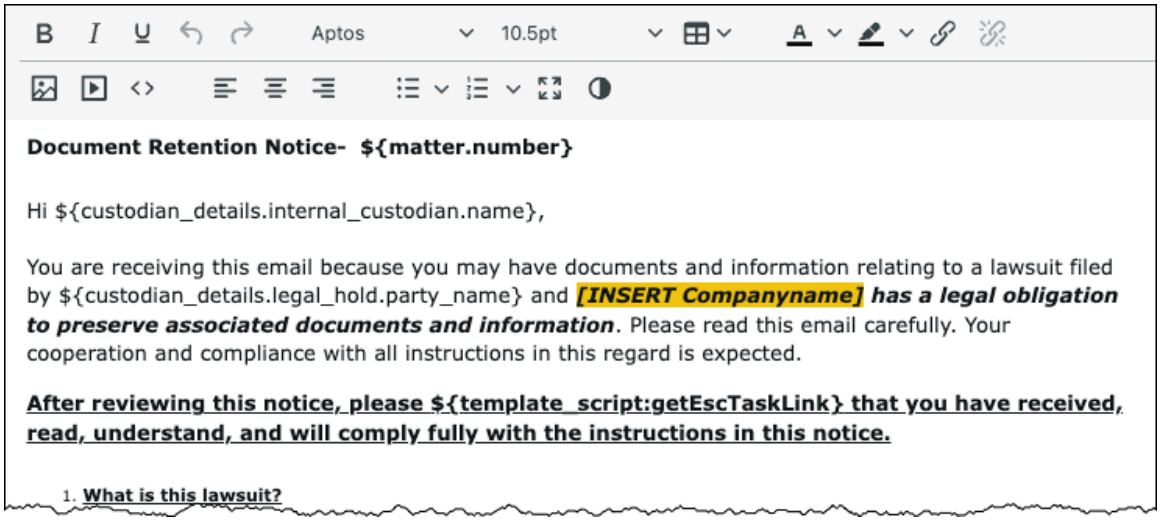

c. Customize the template by substituting your company's name for the placeholder text and adding any additional information you want to include.

> ⚠ **Warning:** Do not modify the JavaScript variables marked with ${ } in the legal hold template. Editing these variables might corrupt the template and prevent the legal hold notice from being generated.

If you want to revert the changes, select **Discard changes**.

d. Select **Save and preview**.

e. Review the edited legal hold notice and select **Issue legal hold**.

Result

The message **Legal hold notice has been sent to X custodians** appears in the **Activity** section.

A legal hold notice is issued to the custodian via email, with the fulfiller copied in the **Cc** field.

In the **Tasks** tab, the state of the task changes from Draft to Assigned.

In the **Artifacts** tab, the legal hold notice sent to the custodian is automatically attached.

Acknowledge the legal hold notice

As a custodian, acknowledge that you have received the legal hold notice, confirming your agreement to preserve all relevant data. This acknowledgment serves as formal documentation supporting the legal team in the context of legal proceedings.

Before you begin

Role required: Custodian

Procedure

1. Open the email with the subject line Legal Hold Notice - Action Required <LM number>.

2. Open the legal hold notice attachment and read it carefully.

3. Acknowledge the legal notice.

a. Select the link either from the email body or from the legal hold notice attachment.

b. In the **My Tasks** tab of Employee Center, select the legal hold matter from the Open tasks list.

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c. Review the legal hold matter details.

d. Select **Acknowledge**.

Result

In the Employee Center, under the **My Tasks** tab, the acknowledged legal hold matter moves from Open to Completed.

In the Legal Counsel Center, under the **Custodians** tab of the legal matter page, the state changes from Assigned to Acknowledged.

Send a reminder to custodians for acknowledgment

Send a reminder to custodians for them to acknowledge their role in ensuring that the data related to the legal hold is preserved.

Before you begin

Role required: sn_lg_hold.legal_hold_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Default lists** tab, navigate to **Matters** > **All**
4. Select the legal hold matter for which the reminder must be sent.
5. Select the **Tasks** tab.
6. Select the task, which must be in the Assigned state.
7. Select **Send reminder**.
8. On the *`Send reminder`* pop-up window, select **Send**.

Result

A reminder email is sent to the custodian.

The message **Reminder notice is sent** appears in the **Activity** section.

Close a legal hold matter

Close a legal hold matter once the legal hold is officially lifted.

Before you begin

Role required: sn_lg_hold.legal_hold_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Default lists** tab, navigate to **Matters** > **All**
4. Select the legal hold matter that you want to close.
5. Select **Close complete**.
6. Enter your comments in the Close complete matter pop-up window.
7. Select **OK**.

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Result
All the custodians receive the mail stating that the legal hold is released.

The message **Legal matter has been closed** appears in the **Activity** section.

In the legal hold matter page, the state changes from Work in progress to Closed Complete.

Reopen a legal hold matter

Reopen a closed legal hold matter when a legal hold is either revoked or newly issued in relation to the same closed legal matter.

Before you begin
Role required: sn_lg_hold.legal_hold_fulfiller

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. In the **Default lists** tab, navigate to **Matters** > **All**
4. Select the legal matter from the list.
5. In the legal matter page, select **Reopen**.
6. In the **Comments** field of the Response matter pop-up window, enter the reason to reopen the legal hold notification matter.
7. Select **OK**.

Result
The closed legal hold notification matter is reopened, and its state changes from Closed complete to Work in Progress.

Legal Hold Notification reference

Reference topics provide additional information about the components used in Legal Hold Notification.

Components installed with Legal Hold Notification

Various components are installed with Legal Hold Notification.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application .

Roles

Roles installed with Legal Hold Notification

Role title [name]	Description	Contains roles
Legal hold admin (sn_lg_hold.legal_hold_admin)	Provides the administrative permissions for Legal Hold Notification application and full access to the underlying data.	• sn_lg_hold.legal_hold_config • sn_lg_hold.legal_hold_fulfiller
Legal hold configurator	Provides access to configure data for the Legal Hold Notification application.	sn_lg_ops.legal_config

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Roles installed with Legal Hold Notification (continued)

Role title [name]	Description	Contains roles
(sn_lg_hold.legal_hold_config)		
Legal hold fulfiller (sn_lg_hold.legal_hold_fulfiller)	Provides fulfiller access to all Legal Hold Notification records.	sn_lg_ops.legal_user
Custodian	Responsible for preserving the data related to the legal hold.	sn_lg_ops.legal_user

Tables

Tables installed with Legal Hold Notification

Table	Description
Legal hold sn_lg_matter_legal_hold	Stores legal hold matters.
Legal hold custodian sn_lg_hold_custodian	Stores custodian details.

Legal hold notification matter intake form

Use the Legal hold notification intake form to submit the legal hold notification matter.

Legal Hold Notification matter intake form

Field	Description
Reason for legal hold	Reason for the legal hold.
Short description	Brief overview of the legal hold purpose.
Summary of legal matter	Detailed summary of the legal issue.
Lawsuit filed by (party name)	Name of the party who filed the lawsuit.
When was the legal hold issued?	Date of the legal hold issued.
Legal hold start date	Date of the legal hold start date.
Legal hold end date	Date of the legal hold end date (if available).
Notice template	Legal hold notice template. An editable legal hold notice template is provided with the Legal Hold Notification application.
Custodial data	The legal user responsible for preserving data related to the legal hold. The field provides the following information:

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Legal Hold Notification matter intake form (continued)

Field	Description
	• Custodian name. • Custodian email, which is automatically populated when the custodian is selected. • Data sources such as documents, spreadsheets, presentations, emails, and attachments.
Add attachments	Enables the attachment of documents related to the legal hold.

Now Assist for Legal Service Delivery (LSD)

Use the ServiceNow® Now Assist for Legal Service Delivery (LSD) application to summarize a legal request or legal matter, generate actionable answers from Knowledge article search results. You can also a submit Conflict of Interest request using conversational intake from the Now Assist panel in Virtual Agent.

None of the Advanced AI and Data Products provide legal or professional advice. The outputs provided by the Advanced AI and Data Products are for informational purposes only and are not a substitute for advice from a qualified professional. Customer assumes all responsibility and obligations with respect to any decisions, advice, conclusions, legal opinions, recommendations made or given as a result of the use of the services, including without limitation, any decision made, or action taken by Customer in reliance upon the Advanced AI and Data Products.

The Advance AI and Data Products and services do not and are not intended to constitute legal advice and do not create an attorney-client relationship.

Get started

Explore



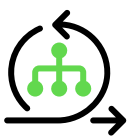
Learn more about Now Assist for LSD

Configure



Configure the Now Assist for LSD application to get started

Use



Use generative AI capabilities offered by Now Assist for LSD

Use agentic workflows

Use the agentic workflows in Now Assist for Legal Service Delivery

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Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- ServiceNow Community on AI and Intelligence
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support.

AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collect information about the Legal Request and/or Legal Matter (including related field information, comments and work notes), and information about search requests (including search prompts and results) from Knowledge articles in Legal Counsel Center and Employee Center. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Explore Now Assist for Legal Service Delivery (LSD)

With the Now Assist for Legal Service Delivery (LSD) application, request fulfillers can use generative AI to summarize a legal request or legal matter. Request fulfillers or legal users can also generate actionable answers from knowledge article search results in Employee Center, Legal Counsel Center, and global search.

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Now Assist for Legal Service Delivery (LSD) overview

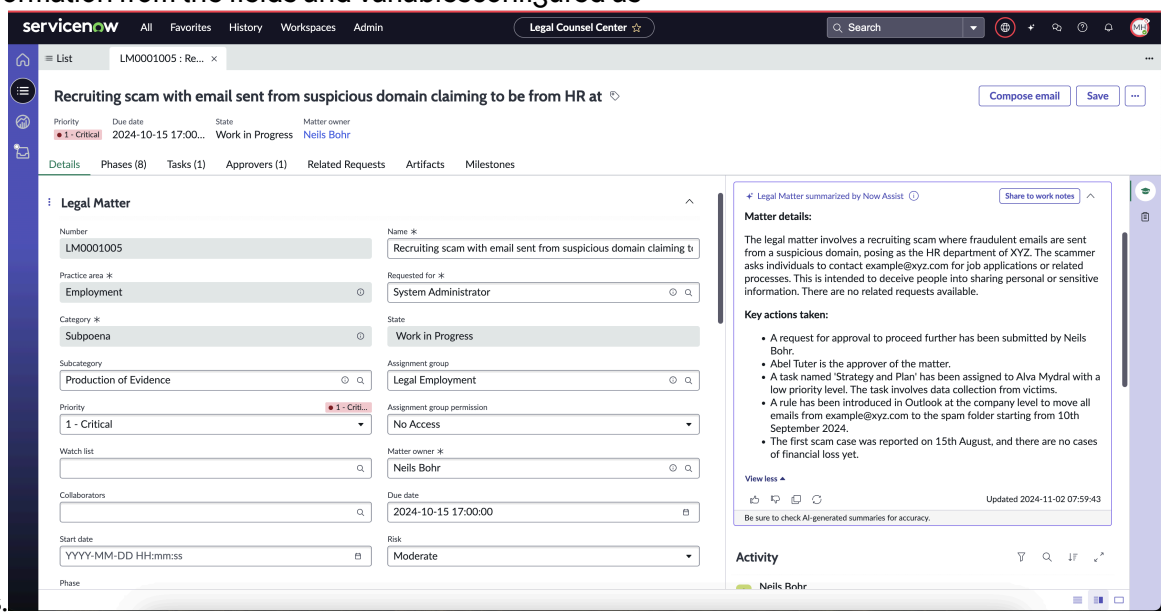
The following generative AI capabilities are available in Now Assist for Legal Service Delivery (LSD):

- Summarization capability for the request fulfillers to get a concise summary of a request or matter. This generative AI summary enables a request fulfiller to understand the context of the request for faster resolution. The summarization capability is available in Legal Counsel Center as well as the Now Assist panel.
- Q&A Genius Results capability for request fulfillers and legal users to generate concise, actionable answers from knowledge article results in Legal Counsel Center, Employee Center, and global search.
- Conversational intake experience allows legal users to initiate Conflict of Interest (COI) requests through Now Assist in Virtual Agent, guiding them with context driven follow-up questions to capture required details.

Legal Request and Legal Matter summarization

The Now Assist for Legal Service Delivery (LSD) application generates an AI-powered summary of a legal request or matter. This summary captures key details and the actions taken throughout the lifecycle of the request or matter. Request fulfillers can review the summary to quickly understand context, refresh it as needed, and post it to work notes for reference and collaboration.

The summary is displayed above the activity stream and includes the information from the fields and variablesconfigured as inputs.



For more information on the fields and variables that are considered for summarization, see Skill inputs for Now Assist for Legal Service Delivery (LSD) and Configure variables for Now Assist summarization.

For information on activating the Legal Request summarization skill or the Legal Matter summarization skill, see Configure Now Assist for Legal Service Delivery (LSD). For information on how to use the skills on Legal Counsel Center, see Summarize a legal request or matter by using Now Assist for Legal Service Delivery (LSD).

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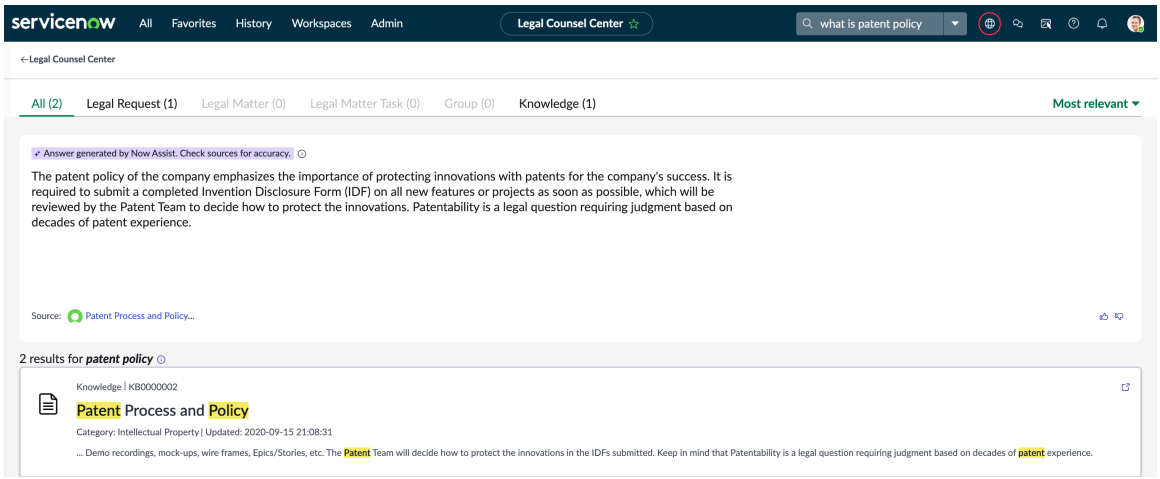
Q&A Genius Results

Q&A Genius Results use the Now LLM Service to generate search results from knowledge article results in Employee Center, Legal Counsel Center, and global search.

The answer card shows a topic snippet and an answer snippet that was extracted from a knowledge article, with direct access to the full article for additional context. For more information, see Genius Results.

It is enabled when both AI Search and Now Assist for Legal Service Delivery (LSD) are activated.



Conversational intake

Conversational Intake guides legal users through submitting Conflict of Interest (COI) requests using a chat-based experience from the Now Assist in Virtual Agent interface of Employee Center

Instead of completing static forms, legal users can describe the COI details in natural language. Details provided in conversational language are automatically populated into the intake form, reducing the effort required to fill in form fields. The system asks relevant follow-up questions based on the request type, and validates responses to ensure that all required details are captured accurately.

After submission, the system evaluates the COI request to determine risk. Low-risk requests are auto-approved, while medium- and high-risk requests are routed for approval.

For more information on COI application and the risk assessment, see Legal Conflict of Interest and Exploring Legal Conflict of Interest.

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

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Now Assist for Legal Service Delivery (LSD) users

Users

User	Description
Administrator [sn_lg_gen_ai.admin]	Provides administrative access to Now Assist for Legal Service Delivery (LSD). Installs Now Assist for Legal Service Delivery (LSD) plugin, and activates the required skills.
Request Fulfiller [sn_lg_gen_ai.request_fulfiller]	Provides access for users to utilize skill for legal requests provided via Now Assist for Legal Service Delivery (LSD).
Matter Fulfiller [sn_lg_gen_ai.matter_fulfiller]	Provides access for users to utilize skill for legal matters provided via Now Assist for Legal Service Delivery (LSD).

Supporting information for Now Assist for Legal Service Delivery (LSD)

Get a quick overview of the important information that is related to the Now Assist for Legal Service Delivery (LSD) application.

Application information

Activate the Now Assist for LSD store app (sn_lg_gen_ai) to use the summarization skills.

This store app has the following dependencies which will be installed automatically:

- Legal Request Management (sn_lg_ops)
- Now Assist for Platform (sn_genai_platform) - Version 7.x and above
- Now Assist Admin Console (sn_nowassist_admin)

You need to install the following applications manually:

- Legal Counsel Center (sn_lg_cf_workspace) - Version 1.5.1 and above
- Legal Matter Management (sn_lg_matter) – Required for Legal Matter summarization

For more information, see Configure Now Assist for Legal Service Delivery (LSD).

Supported user interfaces

The Now Assist for LSD application includes the skills that are listed in the following table.

Now Assist for LSD supported interfaces

Skill	Interface
• Legal Request summarization • Legal Matter summarization	• Core UI • Legal Counsel Center • Now Assist

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Now Assist for LSD supported interfaces (continued)

Skill	Interface
Now Assist Q&A Genius Results	• Employee Center • Global search
Conversational intake	Now Assist in Virtual Agent

Configure Now Assist for Legal Service Delivery (LSD)

If you have the admin role, you can configure the Now Assist for Legal Service Delivery (LSD) application so that legal users or request fulfillers can use the generative AI skills from Legal Counsel Center, Core UI, and Employee Center.

Before you begin

Confirm you have installed Legal Counsel Center (sn_lg_cf_workspace) - Version 1.5.1 or a later version.

Role required: admin

About this task

Important: These Now Assist skills are now turned on by default. The skills will be automatically available to appropriate role users for the application. This change simply activates the skills and does not touch the roles that are needed to use them. The new default behavior works as follows:

New customers

When you install a Now Assist product, designated skills are turned on automatically.

Existing customers who are upgrading (starting with Zurich Patch 4)

Any previously unconfigured skill is turned on automatically (the skill was never turned on, then off again).

There is no change to Now Assist skills that are currently enabled and customized.

Previously configured skills that were turned on, then off, remain inactive.

The legal request summarization and legal matter summarization skills are available in the base system with the required configurations. To customized the skill, you must create a copy of the skill that is in the base system before you modify the configuration. Activating a customized skill with the same base input table as the original skill automatically deactivates the original skill. For more information, see Customize a summarization skill in Now Assist for Legal Service Delivery (LSD).

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

The following table lists the features and skills that you can access from the Now Assist Admin console.

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Legal Service Delivery feature and skills in the Now Assist Admin console

LSD features	Skills
Legal Request and Matter	• Legal request summarization • Legal matter summarization

Procedure

1. Install the Legal Service Delivery - Prime plugin (sn_lg_ai_prime).
   - For information about the plugin dependencies and plugin activation order, see Application information.
   - For information about the installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
3. Navigate to **Employee** > **LSD**.
4. On the tile for your skill, select **Activate skill** if it is deactivated.
   The Now Assist skill is activated.
5. Define who can access the skill and the data.

   a. Select **Edit** from the options icon (⋮) of the active skill.

   b. Navigate to **Define access** to determine who can access the skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

   Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

   c. In the **Role restrictions to skill** section, grant data access to additional roles.
   For more information, see role masking.

   d. Select **Save and continue** to go to the next step.

   e. Complete remaining configurations and select **Done**.

Result

You can deactivate the skill by selecting **Deactivate** from the options icon (⋮) of the active skill.

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Customize a summarization skill in Now Assist for Legal Service Delivery (LSD)

If you have the admin role, you can customize a Now Assist for Legal Service Delivery (LSD) skill so that you can use the generative AI skills in Legal Counsel Center and in Core UI.

Before you begin

Role required: admin

About this task

The legal request summarization and legal matter summarization skills are available in the base system with the required configurations. To customized the skill, you must create a copy of the skill that is in the base system before you modify the configuration. Activating a customized skill with the same base input table as the original skill automatically deactivates the original skill.

From the Now Assist Admin console, you can select the input table, related records, and fields for each input template of the request summarization skill, and then configure the prompt headers to include in the general summary.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **LSD**.
3. Create a copy of the Now Assist for LSD feature summarization skill for customization.
   a. On the feature card that is associated with the skill that you would like to activate, select the More actions icon and create a copy that you can customize by selecting **Make a copy**.
   b. On the confirmation pop-up, select **Make a copy**.
   A guided setup leads you through the configuration of the general details, input, prompt, availability, display, review, and activation of the customized skill. If you complete the entire walk-through, the summarization skill is activated.
4. In the General details step, fill in the fields.
   For information about the inputs for each skill, see Skill inputs for Now Assist for Legal Service Delivery (LSD).
   a. Enter a name and description for the skill.
   b. Select **Save and continue** to go to the next step.
5. Customize the Now Assist context menu configuration.
   Customize the Now Assist context menu configuration to control which options should appear and how they are displayed in the Now Assist summarization.

   Note: Selecting the Enable Extended Tables check box applies the Now Assist context menu configuration to all the extended tables of the legal request and legal matter.

   For more information about the Now Assist context menu summarization, see Summarize records with the Now Assist context menu.
6. View the input data for each skill, such as the base input fields and related lists for the different input templates (New, Work in progress, or Closed states).

   Each skill relies on a base input table and input fields with descriptions to provide context for the Now LLM Service to generate a response.

   Select only those related tables that are offered as the base system, as part of the input data.

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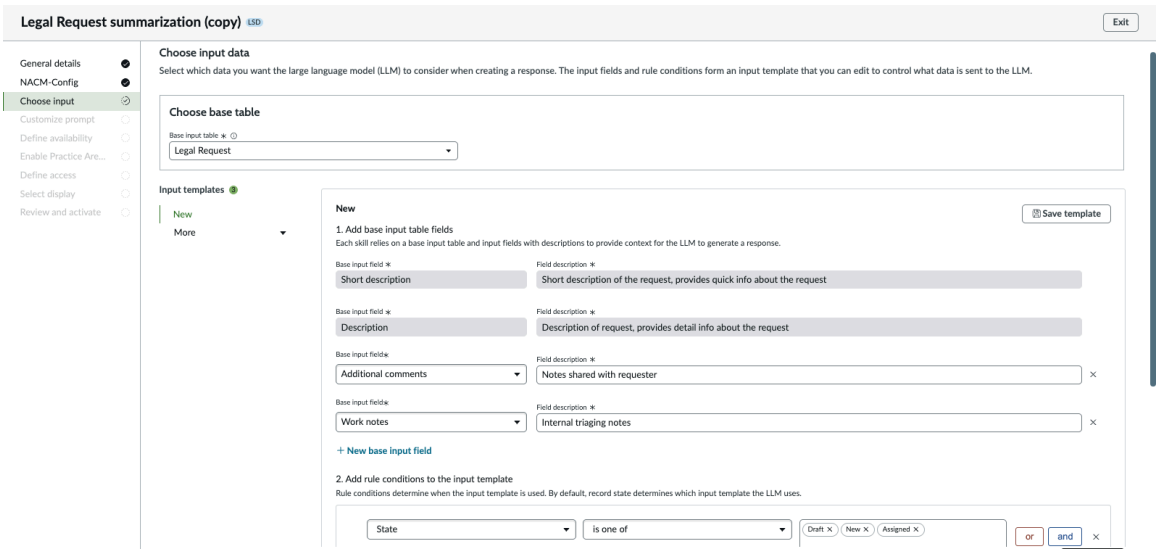
a. For each input template state (New, Work in progress, or Closed), select **+New base input field** and configure the base input table fields.

Add multiple base input fields, as necessary.



The following table lists the base input table fields and descriptions, including a relevant example.

Base input fields

Field	Description
Base input field	Field in the table whose value this skill uses in its response. For example, `Short description`.
Field description	Description of the base input field value. For example, `Short description of legal request, provides quick info about the request.`

b. For each input template state (New, Work in progress, or Closed), configure the rule conditions by using the condition builder to filter the data.

The rule conditions determine when the input template is used. By default, the record state determines the input template that the Now LLM Service uses.

You can build the condition out further by selecting **+New condition set** and configuring additional parameters.

The following table lists the input template states.

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Input template states

State	Description
New	State is New.
Work in progress	State is Work in Progress.
Closed	State is Closed.

c. For each input template state (New, Work in progress, or Closed), select **+New data source** to configure the additional related table and activity stream data, as needed.

Adding input data sources, like the related tables and activity streams, provide more context to the Now LLM Service in a related list.

You can also add the rule conditions to these additional data sources.

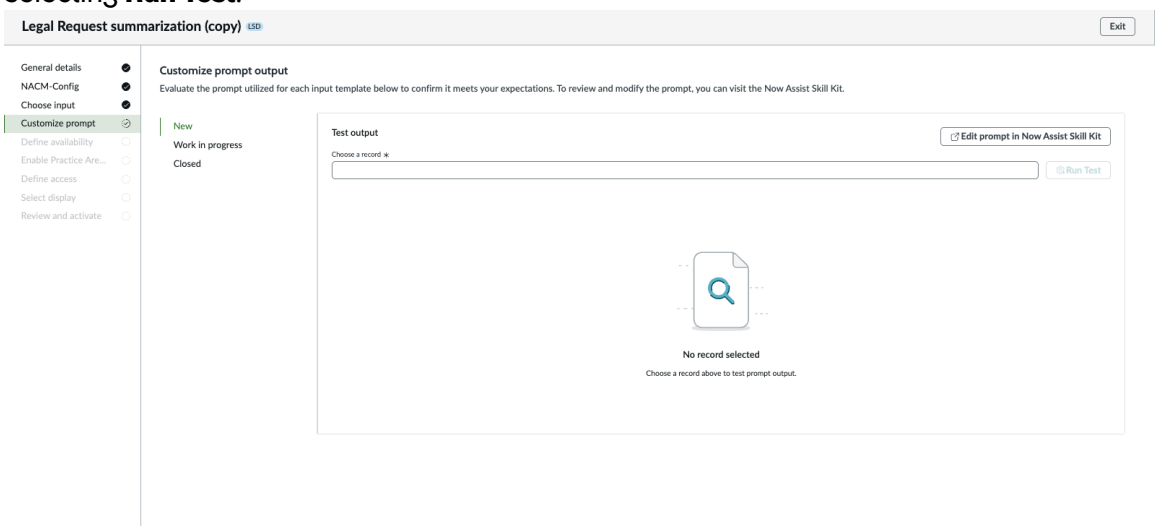
The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt header will contain missing information. For example, for a legal request, you see one related table, such as Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

d. Select **Save and continue** to go to the next step.

7. Customize the prompt.

Review and test the prompt for each input template configuration. You can edit the prompt by selecting **Edit prompt in Now Assist Skill Kit**

a. Select a record in the Test response section, and test the prompt response output format by selecting **Run Test**.



b. Select **Edit prompt in Now Assist Skill Kit** to edit the prompt.

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c. After editing and publishing the prompt in the Now Assist Skill kit, return and test the prompt.

d. On finalizing the prompt, select **Save and continue** to go to the next step.

8. Define how the skill is available to your users.

   a. Configure the skill to be always available to users or select conditions that must be met before the skill is available.
   Selecting **Customize skill availability** displays a condition builder to filter the data further.

   b. Select **Save and continue** to go to the next step.

9. Enable Legal Practice Area tables to be considered for summarization.

   a. Select the check box **Enable extended table selection**.

   b. Select **Save and continue** to go to the next step.

10. Define who can access the skill and the data.

    a. Select **Define access** to determine who can access the skill.

    By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:

    - If custom roles were added before the upgrade, they'll be updated automatically by a script.
    - If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

    > **Note:** In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

    b. In the **Role restrictions to skill** section, grant data access to additional roles.
    For more information, see role masking.

    c. Select **Save and continue** to go to the next step.

11. After you define access, select **Save and continue** to go to the next step.

12. Configure where to display the summarization.

    a. Select either **In-product**, or **Now Assist panel**.

    - **In-product**: When selected, the Now Assist skills are displayed on the forms and workspaces.

      For the skills that appear in-product, select the down arrow to identify the roles that can use the skill.

    - **Now Assist panel**: When selected, the Now Assist skills are available in the Now Assist panel.

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If you don't see this option, you must activate the Now Assist panel. For more information, see Turn on the Now Assist panel.

For the skills that appear in the Now Assist panel, select the down arrow to identify the roles that can use the skill.

b. Select **Save and continue** to go to the next step.

13. Review and activate the skill.
    Review your choices and select **Activate** to complete the skill customization.
    You can now select **Summarize** to generate the summary.
14. Configure the variables of the practice areas that you want to be considered as inputs for the legal request or matter summarization.
    For more information, see Configure variables for Now Assist summarization.

Skill inputs for Now Assist for Legal Service Delivery (LSD)

Get a quick overview of the skill inputs for Now Assist for Legal Service Delivery (LSD) so that you can configure how and when a skill is used.

Depending on the selected skill, you can configure inputs. An input identifies the data that is used for a skill, such as the table and fields that are used to generate a summary.

Configure the variables of practice areas to be considered as inputs for legal request or matter summarization. To add variables, see Configure variables for Now Assist summarization.

Legal Request summarization

The Legal Request summarization skill includes the inputs that identify the table and fields that are used when a summary is generated.

Note: These fields are read-only.

Summarization inputs for a request in the New, , Work in progress, or Closed states

Input table	Input fields
Legal Request [sn_lg_ops_request]	• Short description • Description • Priority • State • Additional comments • Work notes • Opened by

For requests in the Work in progress or closed state, the following additional related tables and fields are considered for summarization.

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Summarization inputs for request in the Work in progress or Closed state

Input table	Input fields
Task SLA->Task	• Has breached • Breach time • SLA definition • Stage • Business time left • Condition for Stage

Legal Matter summarization

The Legal Matter summarization includes the inputs that identify the table and fields that are used when a summary is generated.

Note: These fields are read-only.

Summarization inputs for matter in the New, Work in progress, or Closed state

Input table	Input fields
Legal Matter [sn_lg_matter_matter]	• Short description • Description • Priority • State • Additional comments • Work notes • Parent request
Legal Matter Task->Matter	• Name • State • Order • Priority • Requested by • Phase • Matter • Event name • Assigned to • Due date • Additional comments

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Summarization inputs for matter in the New, Work in progress, or Closed state (continued)

Input table	Input fields
	• Work notes • Short description
Legal Request	Legal Request
Approvers	• State • Approver • Comments • Approving

Configure variables for Now Assist summarization

Configure the variables of the practice areas that you want to be considered as inputs for legal request or matter summarization by using the Now Assist application.

Before you begin

Role required: admin or sn_lg_ops.legal_admin

Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Select the practice area, such as Contracts, Ethics, or Compliance, that you want to add the variables to.
3. On the **Intake Forms** tab, select and open the record.
4. In the information message at the top of the page, select the link **here** to edit the intake form record.
5. Unlock and select the variables by selecting the variables for summarization ( ) icon.

   Note: Only single-row variables that aren't mapped to a field are visible.

6. Add a single variable or multiple variables to an intake form of the practice area.

Option	Steps
Add a single variable	**a.** Open the list of variables by selecting the Lookup using list icon ( ). **b.** Find the variable by using the search bar or scrolling. **c.** Select the variable to add.

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Option	Steps
Add multiple variables	**a.** Open the Edit Members window by selecting the Add/Remove multiple icon ( ) icon. **b.** In the Available Variables list, use the search bar or scroll to find and select the required variables. **c.** Move the variables to the Selected Variable list by selecting the right arrow icon ( ). **d.** If you want to remove a variable, select it from the Selected Variables list and select the left arrow icon ( ). **e.** Apply the selected variables by selecting **Save**. **f.** If you don't want to save changes, select **Cancel**.

7. Lock the selected variables by selecting the unlock key icon).
8. Select **Update**.

Result
All the selected variables are added to the intake form of the practice area.

What to do next
You can add variables to the intake forms of other practice areas by repeating the steps in this procedure.

To summarize a legal request or legal matter, see Summarize a legal request or matter by using Now Assist for Legal Service Delivery (LSD).

Configuring Q&A Genius Results in Now Assist for Legal Service Delivery (LSD)

By using Q&A Genius Results in the Now Assist for Legal Service Delivery (LSD) application, you can quickly find the most optimal information in Employee Center, Legal Counsel Center, and global search.

Q&A Genius Results overview

The Q&A Genius Results capability enables request fulfillers and legal users to generate concise, actionable answers from knowledge article results in Legal Counsel Center, Employee Center, and global search.

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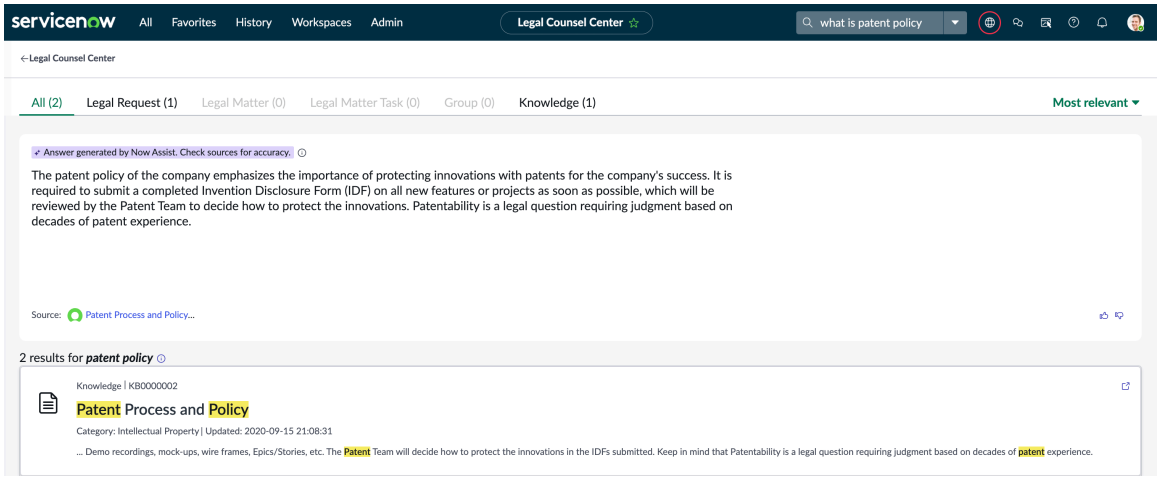

Q&A Genius Results configuration

For Legal Counsel Center, the Q&A Genius Results feature is activated by default when you install and activate AI Search and the Legal Service Delivery - Prime plugin (sn_lg_ai_prime) application.

For global search and Employee Center, you must enable Q&A Genius Results manually. For more information, see Enabling Now Assist Q&A Genius Results and Enable Now Assist genius results.

For more information on the other supported search engines, see Search in Legal Service Delivery.

Configure conversational intake for Conflict of Interest request

Confirm required applications are installed to enable legal users to submit a Conflict of Interest (COI) request using conversational interface of Now Assist panel in Virtual Agent.

Role required: admin

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

- Confirm you have installed and configured the following applications for the conversational intake for COI.
  - Now Assist in Conversational Catalog Request (sn_now_assist_cr)
  - Catalog Conversational CoverageApp id (sn_catalog_con_cov)
- Confirm AI Search is enabled. For more information, see Configuring AI Search.
- Confirm the Now Assist panel is turned on. For more information, see Turn on the Now Assist panel.
- Confirm Now Assist in Virtual Agent is configured. For more information, see .

Configure Triage legal requests agentic workflow

You can configure the Triage legal requests agentic workflow in the Now Assist for Legal Service Delivery (LSD) application to analyze the general legal requests, predict the appropriate legal category, and initiate a transfer when a legal fulfiller or group manager confirms the request.

You must complete the following tasks to activate and use the Triage legal requests agentic workflow:

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1. Install the Legal Service Delivery - Prime plugin (sn_lg_ai_prime).
2. Confirm the Now Assist panel is turned on. For more information, see Turn on the Now Assist panel.
3. Confirm the **Now Assist Panel - Platform (default)** assistant in the CI Admin Experience is turned on. For more information, see Manage LLM virtual agents on the Assistants screen.
4. Configure AI Search. For more information, see Configuring AI Search.
5. Activate the Triage Legal request use case business rule to activate the Triage legal requests agentic workflow. For more information, see Activate the business rule for the Triage legal requests agentic workflow.
6. Include the legal practice application tables for AI Search indexing. For more information, see Add legal request tables for data indexing.

Important: The Now Assist panel lists the following skills that are required for the Triage legal requests agentic workflow:

- Get category of the legal request
- Triage Legal Request Capability
- Triage Legal Request AI search

You can access the Now Assist panel by navigating to **All** > **Now Assist Admin** > **Skills** > **Employee** > **LSD**.

The skills are available in an active state in the base system and should not be modified.

Activate the business rule for the Triage legal requests agentic workflow

Activate the business rules for the Triage legal requests agentic workflow in the Now Assist for Legal Service Delivery (LSD) application.

Before you begin

Role required: admin

About this task

The Triage legal requests agentic workflow is shipped in an inactive state in the base system. To activate it, you must enable the business rule named the Trigger Triage Legal Request use case.

By default, the script include in this business rule contains the sys_id of the Trigger Triage Legal Request use case. If you have a customized use case, you must update the script include in the business rule with the sys_id of your customized use case.

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
   The Business Rules table appears.
2. In the Name column, search for `Trigger Triage Legal Request use case`.
3. Open the *`Trigger Triage Legal Request use case`* rule.
4. Select the **Active** check box.
5. **Optional:** For a customized agentic workflow, update *`usecaseId`* in the script with the sys_id of the customized agentic workflow.

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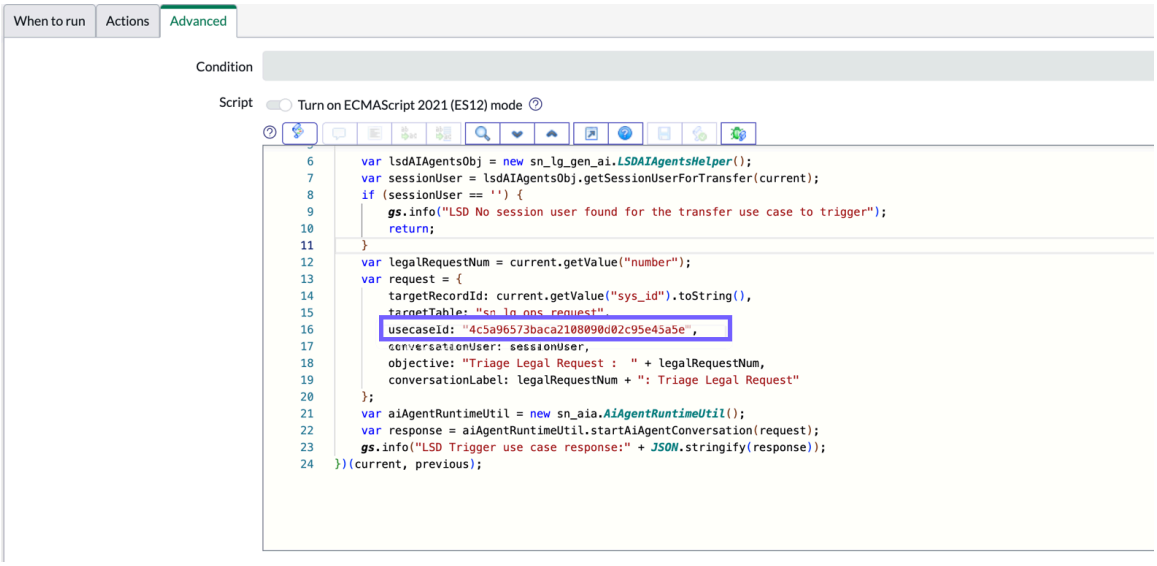
a. Navigate to the Advanced related list.

b. In the script, update the value for *usecaseId* with the sys_id of the customized agentic workflow.



To get the sys_id of a customized use case, navigate to the use cases list, right-click the customized use case record, and select#**Copy sys_id**.

6. Select **Update**.

Result

The Triage legal requests agentic workflow is activated for Now Assist for Legal Service Delivery (LSD).

Add legal request tables for data indexing

Add the legal request tables to be considered for data indexing for AI Search in the Now Assist for Legal Service Delivery (LSD) application. The legal request tables are indexed so that you can get relevant AI Search results for the legal records.

Before you begin

Set the application scope to **Legal Counsel Center** in the application picker. For more information, see Application picker.

Role required: admin

About this task

Include the legal request tables to define them as indexed sources. These added tables are then selected for indexing. For more information on the indexing of sources for AI Search, see Indexed source retention policies and filter conditions.

Procedure

1. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
2. In the Name column, search for `Legal Requests`.
3. Select the Legal Requests indexed source.
4. Select **Index All Tables**.

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Result
The legal request tables are indexed for AI Search.

Configure the semantic index settings for legal request tables

Configure the semantic index settings to define how AI Search indexes the content from the legal request tables in the Now Assist for Legal Service Delivery (LSD) application.

Before you begin
Set the application scope to **Legal Counsel Center** in the application picker. For more information, see Application picker.

Role required: admin

About this task
These semantic index settings specify how AI Search indexes the content from the indexed source for use with the semantic vector search. For more information on the indexing of sources for AI Search, see Semantic index configuration for indexed sources.

Procedure
1. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
2. In the Name column, search for `Legal Requests`.
3. Select the Legal Requests indexed source.
4. Select the Semantic Index configurations related list.
5. Add the semantic index configuration by selecting **New**.
6. On the form, fill in the fields.

Semantic Index configurations New Record form

Field	Description
Name	Name of the semantic index. In the **Name** field, enter `body`.
Embedded Models	List of the embedded models to use for the semantic index configuration. The **Embedded Models** field is automatically set to **Embedded Models**.
Active	Option to make the semantic index configuration active for your instance. AI Search ignores inactive semantic index configurations when indexing content from the specified index source.
Indexed Source	Reference to the AI Search indexed source that you want to apply this semantic index configuration to. The **Indexed Source** field is automatically set to**Legal Counsel Center**.
Application	Name of the application to which the semantic index belongs.

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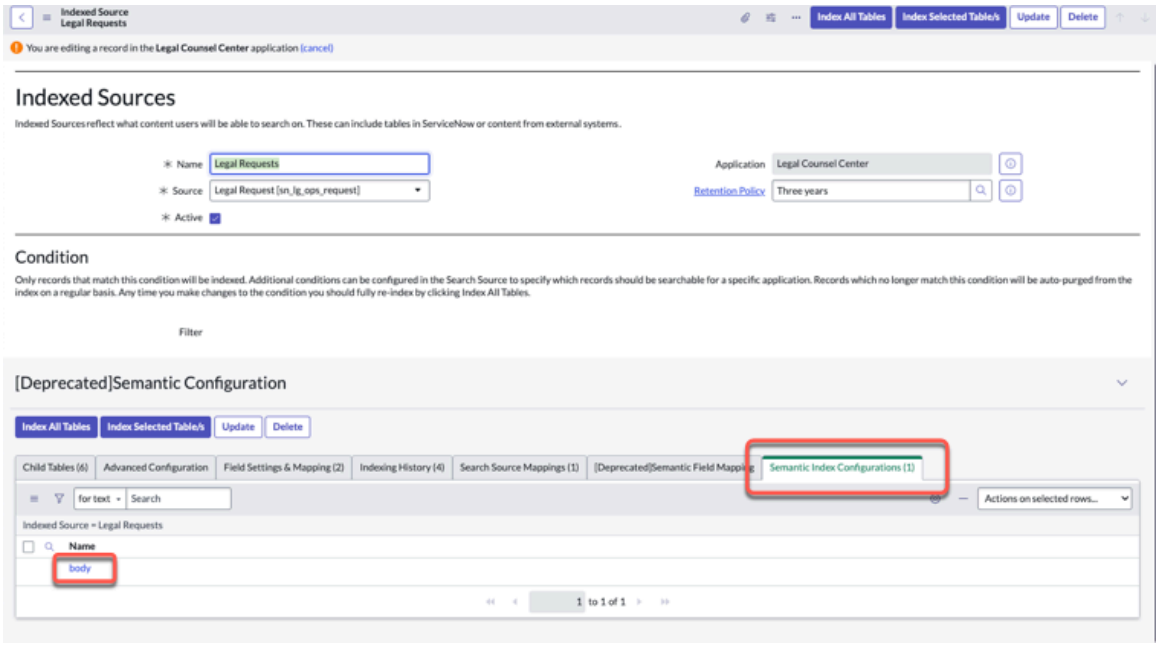
Field	Description
	The **Application** field is automatically set to **Legal Counsel Center**.

7. Select **Submit**.

Result
The data from the legal request tables are indexed for AI Search according to the semantic index settings.

Semantic index record



What to do next
Add fields to the semantic index record by selecting **body**. For more information, see Add fields to the semantic index for legal records.

Add fields to the semantic index for legal records

Add the description, short description, and legal category field to the semantic index record to be indexed for a semantic search in the Now Assist for Legal Service Delivery (LSD) application. During AI Search, the legal records are retrieved based on the description, short description, and legal category fields that are added in the semantic index.

Before you begin
Set the application scope to **Legal Counsel Center** in the application picker. For more information, see Application picker.

Role required: admin

About this task
These semantic index settings specify how AI Search indexes the content from the indexed source for use with the semantic vector search. For more information on the indexing of sources for AI Search, see Semantic index configuration for indexed sources.

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Procedure

1. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
2. In the Name column, search for `Legal Requests`.
3. Select the Legal Requests indexed source.
4. Select the Semantic Index configurations related list.
5. Select the record **body**.
6. Select **New**.
7. In the application picker, set the application scope to **Legal Request Management**.
8. On the form, fill in the fields.

Semantic Index Fields New Record form

Field	Description
Semantic Index Name	Name of the semantic index. The **Semantic Index Name** field is automatically set to **body**.
Source	Source table whose value you want to include in the semantic index. The **Source** field is automatically set to **Legal Request**.
Type	Type of object to index for a semantic vector search. From the drop-down list, select **Field**.
Application	Name of the application that the Semantic Index belongs to. The **Application** field is automatically set to **Legal Request Management**.
Order	Order of concatenation for this field's value relative to the values of other semantic index fields that are defined in the same semantic index configuration. The fields with lower values appear first in the concatenation.
Field Name	Name of the legal request field to include in the semantic index. Select the **short-description** field to include in the semantic index.

9. Select **Submit**.
10. Repeat the steps 6 and 7 to add the following fields from the Legal Request [sn_lg_ops_request] table.

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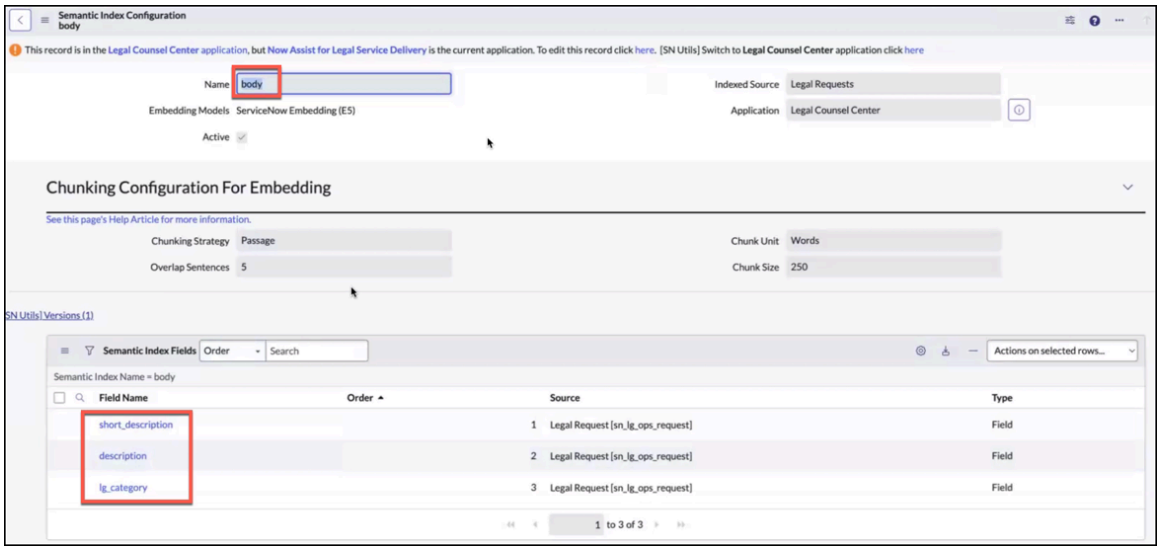
- **description**
- **lg-category**

Note: You must add all description, short description, and legal category fields (**description**, **short_description**, and **lg-category**) to the Semantic Index **body** record.

Result

The description, short description, and legal category fields are indexed for the semantic search.

Add fields to the semantic index



Add restricted caller access privileges for accessing the legal request table

Create restricted caller access (RCA) privileges to ensure authorized access to the legal request table in the Now Assist for Legal Service Delivery (LSD) application.

Before you begin

Set the application scope to **Legal Request Management** in the application picker. For more information, see Application picker.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **Application Restricted Caller Access**.
2. Create an RCA for a script include.
   a. Select **New**.
   b. On the form, fill in the fields.

Create RCA for script include form

Field	Description
Source Scope	Scope of the calling application. Select **Now Assist AI Agents**.
Source Type	Type of record that is calling the application resource.

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Field	Description
	Select **Script Include**.
Source Table	Table that contains the Source record. Select **Script Include [sys_script_include]**.
Source	Cross-scope record that is accessing a restricted application resource. ▪ Select Lookup Documents by using the list icon ( ). ▪ In the field document, search and set the value as **Script Include: AiAgentRuntimeRequest**.
Status	Status of the access request. From the drop-down list, select **Allowed**.
Application	Application of the target resource. The field is automatically set to **Legal Request Management**.
Target Scope	Scope of the requested resource. Select **Legal Request Management**.
Target Type	Type of the requested resource. Select **Table: Legal Request**.
Operation	Operation that was performed on the target resource. Select **Read**.

c. Select **Submit**.

3. Create an RCA for a short description.

a. Select **New**.

b. On the form, fill in the fields.

Create RCA for short description form

Field	Description
Source Scope	Scope of the calling application. Select **Global**.
Source Type	Type of record that is calling the application resource. Select **GlideScopedEvaluator**.
Source Table	Table that contains the Source record.

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Field	Description
	Select **Value [sys_variable_value]**.
Source	Cross-scope record that is accessing a restricted application resource. ▪ Select Lookup Documents by using the list icon ( ). ▪ In the field document, search and set the value as **58d70eff2bb0ea50099bfd2cce91bf1d**.
Status	Status of the access request. From the drop-down list, select **Allowed**.
Application	Application of the target resource. The field is automatically set to **Legal Request Management**.
Target Scope	Scope of the requested resource. Select **Legal Request Management**.
Target Type	Type of the requested resource. Select **Dictionary Entry: Short description**.
Operation	Operation that was performed on the target resource. Select **Read**.

c. Select **Submit**.

4. Create an RCA for the description.

a. Select **New**.

b. On the form, fill in the fields.

Create RCA for description form

Field	Description
Source Scope	Scope of the calling application. Select **Global**.
Source Type	Type of record that is calling the application resource. Select **GlideScopedEvaluator**.
Source Table	Table that contains the Source record. Select **Value [sys_variable_value]**.
Source	Cross-scope record that is accessing a restricted application resource.

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Field	Description
	▪ Select Lookup Documents by using the list icon ( ). ▪ In the field document, search and set the value as **58d70eff2bb0ea50099bfd2cce91bf1d**.
Status	Status of the access request. From the drop-down list, select **Allowed**.
Application	Application of the target resource. The field is automatically set to **Legal Request Management**.
Target Scope	Scope of the requested resource. Select **Legal Request Management**.
Target Type	Type of the requested resource. Select **Dictionary Entry: Description.**
Operation	Operation that was performed on the target resource. Select **Read**.

c. Select **Submit**.

5. Create an RCA for a legal request.

a. Select **New**.

b. On the form, fill in the fields.

Create RCA for legal request form

Field	Description
Source Scope	Scope of the calling application. Select **Global**.
Source Type	Type of record that is calling the application resource. Select **GlideScopedEvaluator**.
Source Table	Table that contains the Source record. Select **Value [sys_variable_value]**.
Source	Cross-scope record that is accessing a restricted application resource. ▪ Select Lookup Documents by using the list icon ( ). ▪ In the field document, search and set the value as **58d70eff2bb0ea50099bfd2cce91bf1d**.

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Field	Description
Status	Status of the access request. From the drop-down list, select **Allowed**.
Application	Application of the target resource. The field is automatically set to **Legal Request Management**.
Target Scope	Scope of the requested resource. Select **Legal Request Management**.
Target Type	Type of the requested resource. Select **Table: Legal Request**
Operation	Operation that was performed on the target resource. Select **Read**.

c. Select **Submit**.

6. Create an RCA for a category.

a. Select **New**.

b. On the form, fill in the fields.

Create RCA for category form

Field	Description
Source Scope	Scope of the calling application. Select **Global**.
Source Type	Type of record that is calling the application resource. Select **GlideScopedEvaluator**.
Source Table	Table that contains the Source record. Select **Value [sys_variable_value]**.
Source	Cross-scope record that is accessing a restricted application resource. ▪ Select Lookup Documents by using the list icon ( ). ▪ In the field document, search and set the value as **58d70eff2bb0ea50099bfd2cce91bf1d**.
Status	Status of the access request. From the drop-down list, select **Allowed**.
Application	Application of the target resource.

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Field	Description
	The field is automatically set to **Legal Request Management**.
Target Scope	Scope of the requested resource. Select **Legal Request Management**.
Target Type	Type of the requested resource. Select **Table: Category**.
Operation	Operation that was performed on the target resource. Select **Read**.

c. Select **Submit**.

Using Now Assist for Legal Service Delivery (LSD)

If you have a sn_lg_gen_ai.request_fulfiller role, you can summarize the details of the legal requests and matters with the Now Assist for Legal Service Delivery (LSD) application. You can also use Now Assist Q&A Genius capability to get actionable search results from knowledge articles.

Summarize a legal request or matter by using Now Assist for Legal Service Delivery (LSD)

Generate a summary from the fields that you selected on the legal request or matter record and quickly understand the request context by using the Legal Request or Legal Matter summarization skill in the Now Assist for Legal Service Delivery (LSD) application.

Before you begin

Role required: sn_lg_gen_ai.request_fulfiller

About this task

The Legal Request or Legal Matter summarization skill provides you with a concise summary of a legal request or legal matter, including the actions taken and resolution details. By viewing a summary, you can understand the context, refresh the summary, and post the summary to the work notes.

You can configure the variables of practice areas that you want to be considered as inputs for legal request or matter summarization by using the Now Assist application. To add variables, see Configure variables for Now Assist summarization.

The summarization skills are available in Legal Counsel Center and in Core UI.

- In Legal Counsel Center, you use the Legal Request summary by Now Assist component to generate a summary. This component appears above the activity stream.

  Note: You can also generate a summary on demand from the Now Assist panel. For more information, see Use the Now Assist for Legal Service Delivery (LSD) capabilities from the Now Assist panel.

- In Core UI, you select the **Summarize** button on the legal request or matter record to generate a summary.

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Procedure

1. Navigate to **Workspaces** > **Legal Counsel Center** and open a legal request or matter.
2. In the Legal Request summary by Now Assist component, select **Summarize**.
   The summary by Now Assist component appears above the activity stream.

   Note: Generating and displaying the summary may take several seconds.

3. **Optional:** When you finish summarizing a record, you can add it to the work notes, expand or collapse it, provide feedback, copy it, or view information about it.

Option	Procedure
Save the summary information by adding it to the work notes	**a.** Select **Share as Work notes**. **b.** In the Share to work notes dialog box, edit the summary. **c.** Select **Save to Work notes**.
Expand or collapse the summary	Select the expand card icon ( ) or the collapse card icon ( ) to see more details or fewer summary details.
Provide feedback for the summary	If you think that the summary was helpful, select the helpful icon ( ). If you think that the summary wasn't helpful, select the not helpful icon ( ). This feedback improves the generative AI model and can help to improve the future versions of this skill. The system gathers the feedback on each generated summary and stores it in the generative AI logs (sys_generative_ai_log_list.do).
Copy the summary	Select the copy to clipboard icon ( ) to use the summary information for another purpose, such as pasting into an email.
Refresh the summary	Select the Refresh icon ( ) to summarize the request again.
View the information about the summary	If you want to check some details about the summary, select the more info icon ( ).
Elaborate	Select elaborate to get more comprehensive summary with additional details.

Use the Now Assist for Legal Service Delivery (LSD) capabilities from the Now Assist panel

Use the contextual generative AI capabilities, such as a request summary by using the conversational interface in the Now Assist panel.

Before you begin

Make sure that Next Experience is enabled in the instance. For more information, see Next Experience UI.

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Role required: sn_lg_gen_ai.request_fulfiller

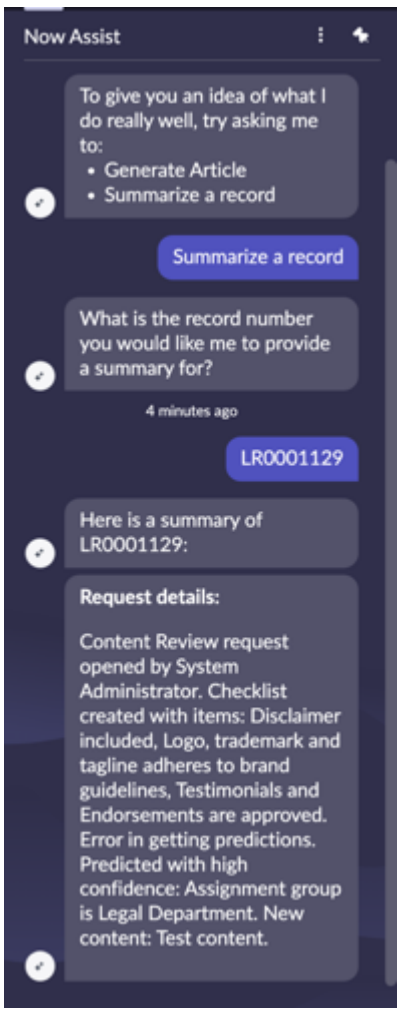
About this task

You can use the Now Assist panel to request a summary.

For more information about the Now Assist panel, see Now Assist panel. For information about activating the Now Assist panel, see Turn on the Now Assist panel.

Procedure

1. Log in to an instance where the Now Assist for LSD application is installed.
2. Navigate to **Workspaces** > **Legal Counsel Center**.
3. Request the generative AI capabilities in LSD for summarization by selecting the Now Assist icon.
4. After you request the generative AI capabilities, select **Summarize a record**.
5. Enter the record number that you want to summarize.
   The summary is displayed.



Generate search results using Q&A Genius Results in Now Assist for Legal Service Delivery (LSD)

Generate actionable search results from knowledge article results in Legal Counsel Center, Employee Center, and global search by using Q&A Genius Results in Now Assist for Legal Service Delivery (LSD).

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Before you begin

For Legal Counsel Center, Q&A Genius Results is activated by default when you install and activate AI Search and Legal Service Delivery - Prime plugin (sn_lg_ai_prime).

For global search and Employee Center, you must enable Q&A Genius Results manually. For more information, see Enabling Now Assist Q&A Genius Results and Enable Now Assist genius results.

Ensure you have configured the Q&A Genius skill. For more information, see Configuring Q&A Genius Results in Now Assist for Legal Service Delivery (LSD).

For more information on the other supported search engines, see Search in Legal Service Delivery.

Role required:

- sn_lg_ops.legal_fulfiller for Legal Counsel Center
- sn_lg_ops.legal_user for Employee Center
- No specific role is required to access global search.

Procedure

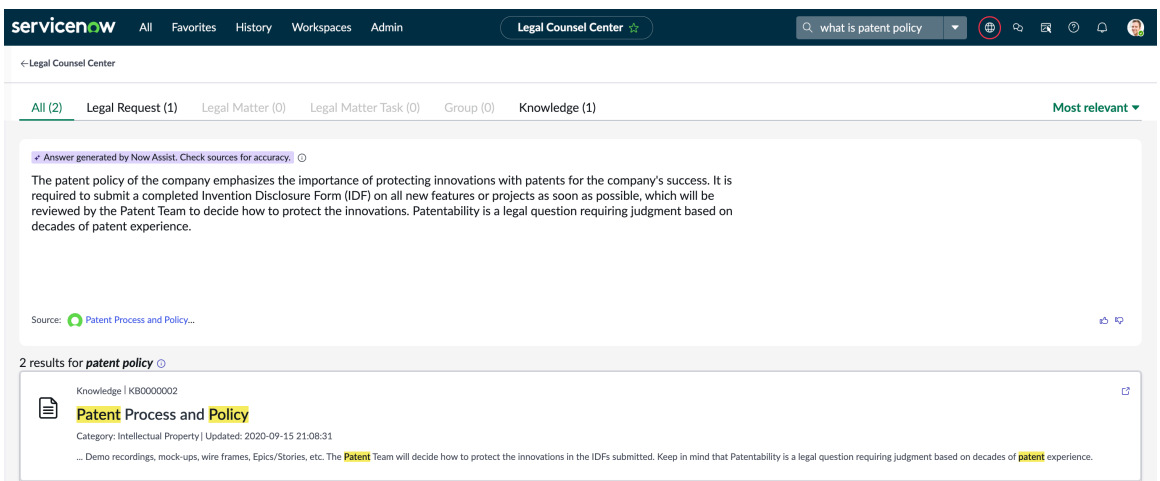
1. Navigate to the workspace through either the Legal Counsel Center, Employee Center, or Global Search.

Option	Description
Legal Counsel Center with the sn_lg_ops.legal_fulfiller role	Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
Employee Center with the sn_lg_ops.legal_user role	Navigate to **All** > **Employee Center**
Global search	Navigate to landing page of a ServiceNow instance.

2. In the **Search** field, enter your query.

Result

With your search results, you also see an answer card with a topic snippet and an answer snippet extracted from a single knowledge article. You can view the full article directly from the answer card.



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Submit COI request using Now Assist conversational intake

Submit Conflict of Interest (COI) requests through natural language conversations.

Before you begin

Role required: sn_lg_ops.legal_user

About this task

Legal Conflict of Interest (COI) enables you to manage the disclosure, approval, and registry of conflict of interest that might arise from employees having competing interests or loyalties. You can submit COI requests using any of the following methods in the Employee Center:

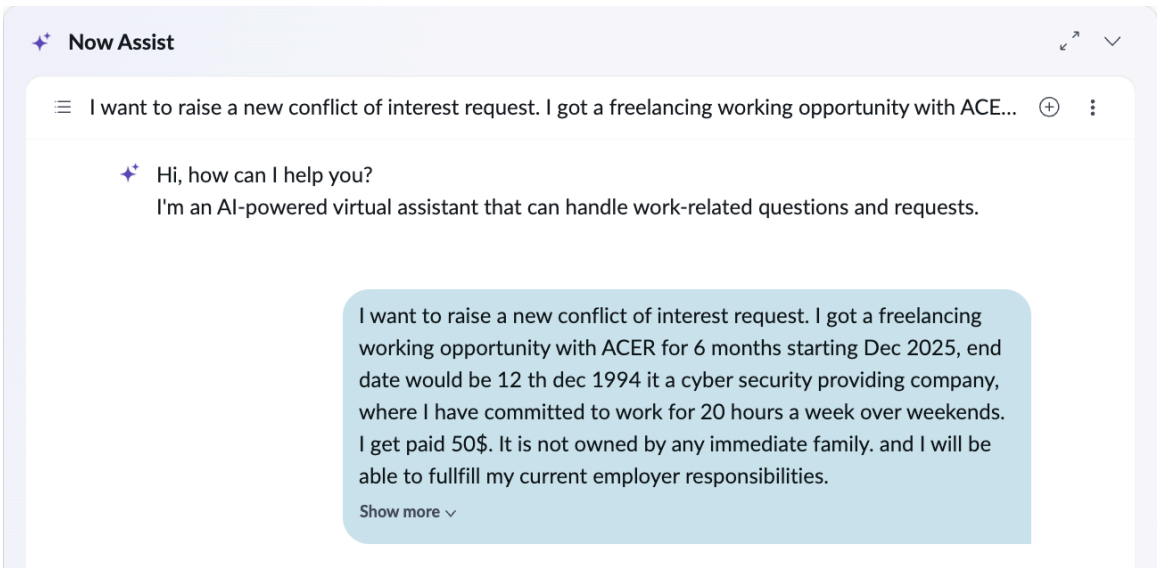
- COI intake form.
- Conversational intake interface from the Now Assist in Virtual Agent.

This topic describes how to submit a COI request using the conversational interface. The conversational intake functionality is available only when you have installed and configured Legal Service Delivery - Prime plugin (sn_lg_ai_prime) that is a paid application.

For more information on how to submit a COI request using Employee Center intake form, see Submit COI request form Employee Center

Procedure

1. Navigate to **All** > **Employee Center**.
2. Select the Now Assist panel icon ( ).
3. Enter a message in the chat to indicate that you want to report disclose a conflict of interest. Example: I need to disclose an employment opportunity for Acme, a for-profit services company, for an 18-month starting 2026-04- 01 and ending 2027-09-30. The organization is not family-owned. My role will involve providing technical services on a project basis.



4. The message is analyzed and you are presented with suggestions, including an option to initiate a COI request.

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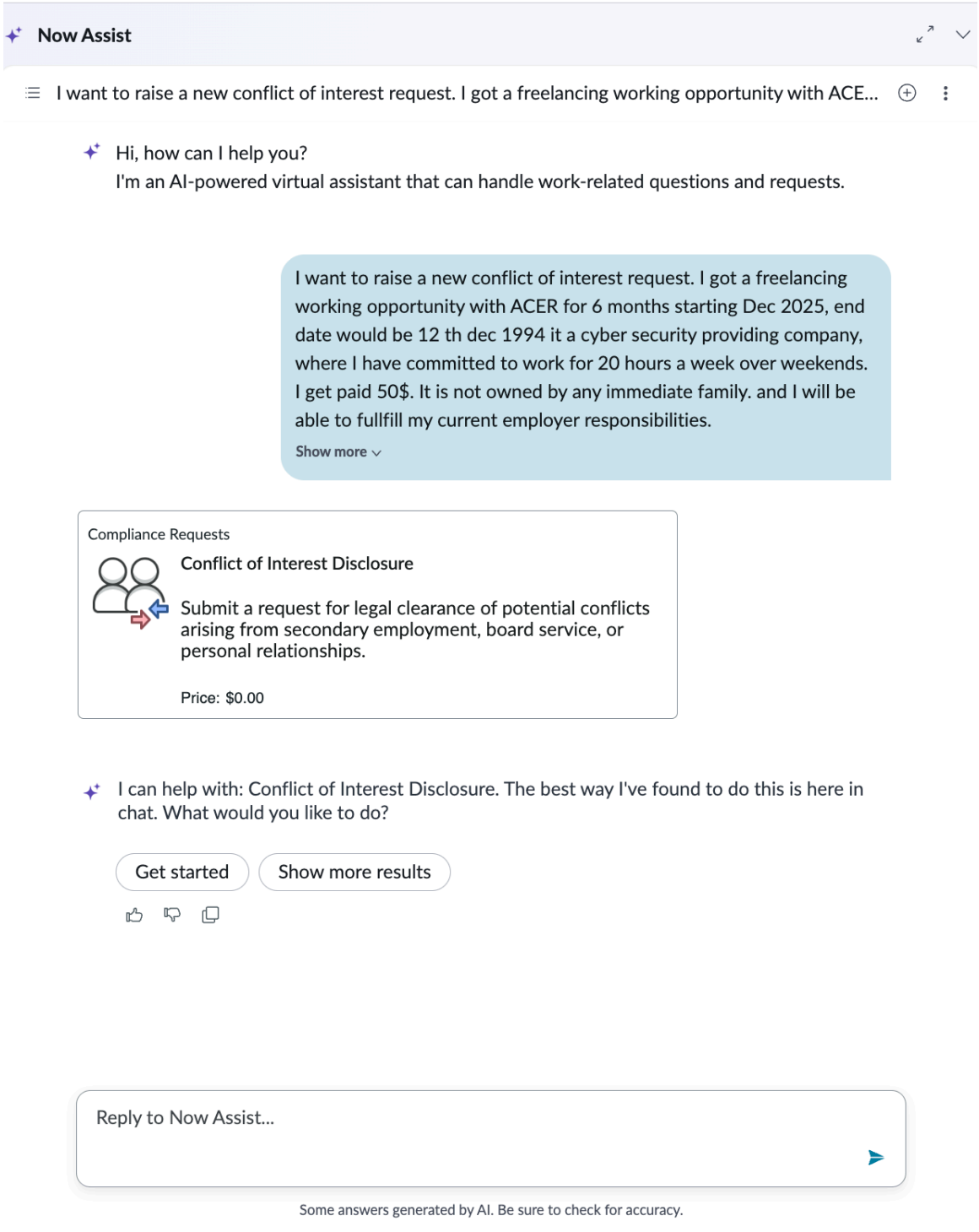

5. Select **Get started**.
   Relevant follow-up questions are prompted to gather additional details.
6. Respond to the follow-up questions with the relevant details.
   After all relevant details are gathered, a summary is displayed with an option to submit the request.

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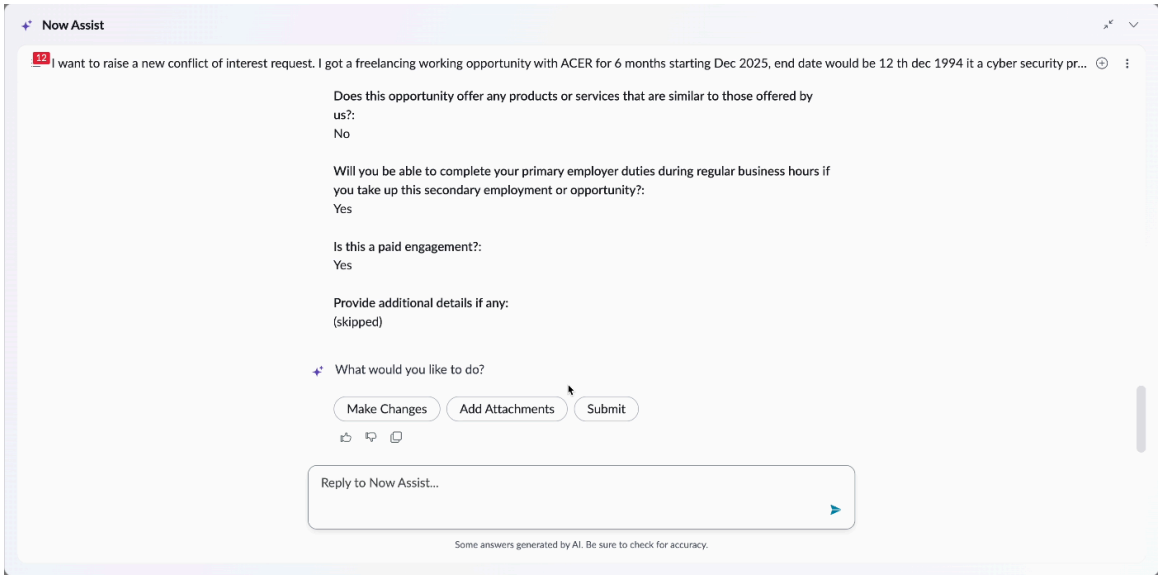
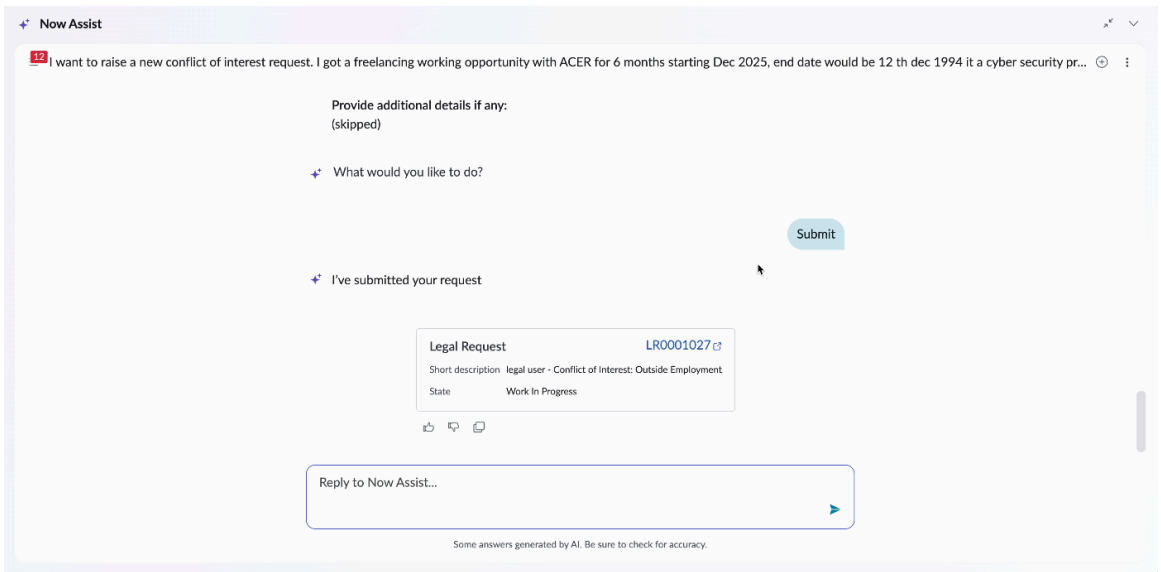


7. Review the summary and select **Submit** when the details are as required.
   The request is submitted and you can view it from the Employee Center. The system evaluates the COI request to determine risk. Low#risk requests are auto#approved, while medium# and high#risk requests are routed for approval.



For more information, see Approve or reject a conflict of interest disclosure request

Result

When an employee submits a COI disclosure the risk assessment utility evaluates the submission against a set of predefined risk factor . Each risk factor contributes to an overall risk score, which determines the risk level (Low, Medium, or High) and the corresponding approval routing. The risk level determines whether the request needs approval or can be auto-approved. For more information in how to manage COI requests, see Approve or reject a conflict of interest disclosure request.

Using agentic workflow in Now Assist for Legal Service Delivery (LSD)

Use agentic workflows for Legal Service Delivery to analyze general legal requests, predict the appropriate legal category, and initiate a transfer after confirmation from the legal fulfiller or group manager.

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Available agentic workflows for Legal Service Delivery AI Agent Collection

Agentic workflow name	Description	Available AI agents
Triage legal requests	Uses AI agents to analyze general legal requests, predict the appropriate legal category, and initiate a transfer upon a confirmation from the legal fulfiller. The agentic workflow enhances response times, reduces manual tasks, and improves overall productivity. **Note:** The agentic workflow is triggered in the Now Assist panel. It is not supported in the Virtual Agent panel.	• Record field value prediction AI agent • Transfer legal request AI agent

Important: By default, all agentic workflows and AI agent records are read only.

For more information on the AI agents, see Now Assist AI agents.

To modify an agentic workflow, you must first duplicate it, and then update it. For more information, see:

- Duplicate an agentic workflow
- Create an agentic workflow
- Modify an agentic workflow

Note:

- When you modify an agentic workflow, AI agents, or tools, make sure that you update all instructions accordingly.
- If you have a customized triage legal request agentic use case, update the script include of the business rule with the sys_id of the customized use case. For more information, see Activate the business rule for the Triage legal requests agentic workflow.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Triage legal requests agentic workflow

Use the Triage legal requests agentic workflow to predict the appropriate legal category and to initiate a transfer after a confirmation from the legal fulfiller or group manager.

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Triage legal requests agentic workflow overview

Important:

- To run the Triage legal requests agentic workflow, ensure that you have completed all the configurations. For more information, see Configure Triage legal requests agentic workflow.
- If your generative AI service provider is not Now LLM Service, ensure that the API connections and credentials are configured. For more information, see Configuring API credentials for generative AI capabilities.
-

The agentic workflow is triggered under the following conditions:

- A general legal request is submitted and an assignment rule is configured for it.
- The **Assigned to** field is updated for a general legal request.

The agentic workflow conversation can be seen in the Now Assist panel by the legal fulfiller or group manager with the now_assist_panel_user role.

Accessing the Triage legal requests agentic workflow from the AI Agent studio

You can access the agentic workflow from AI Agent Studio when you have the sn_aia.admin role.

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Triage Legal Requests**.

AI agents used in the Triage legal requests agentic workflow

AI agents names and descriptions

Name	Description
Record management AI agent	Obtains the request details from the provided description.
Record field value prediction AI agent	Checks for similar records and predicts the legal category.
Transfer legal request AI agent	Is the supervised agent. The AI agent predicts the appropriate legal category, and initiates a transfer after a confirmation from the legal fulfiller.

Using Triage legal requests agentic workflow

The agentic workflow conversation can be seen in the Now Assist panel by the legal fulfiller or group manager with the now_assist_panel_user role.

1. Open the Now Assist panel by selecting the Now Assist icon
2. In the Now Assist chat panel, select the legal request under the active chat.
3. See the agentic workflow conversation and the predicted legal category:

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- If you choose to transfer the general legal request, enter `Yes` and select the send icon ( ) in the panel. When it's transferred, the original request is canceled and a new request is created with the predicted legal category. The agentic conversation is closed after the transfer of the legal request.
- If you choose not to transfer the general legal request, enter `No` and select the send icon ( ) in the panel. The general legal request isn't transferred and the agentic conversation is closed.

Integration of Legal Service Delivery with ServiceNow applications

Extend Legal Service Delivery capabilities by integrating with other ServiceNow applications.

Contract Management Pro for Legal Service Delivery

With the Legal Contract Management Pro for Legal Service Delivery, you can configure and automate the legal contract lifecycle by creating contract document templates, clauses, and clause variations. The legal contract lifecycle enables you to submit, review, finalize, and manage legal contract and amendment requests. The integration also supports e-signatures and external storage systems.

Get started

Explore Learn about the features and benefits of Contract Management Pro for Legal Service Delivery.	**Configure** Install and configure Contract Management Pro for Legal Service Delivery.	**Use** Use Contract Management Pro for Legal Service Delivery to submit, review, finalize, and manage legal contract requests.
Manage Manage legal requests and legal contracts	**Reference** Get details about components such as roles, tables, plugins, and store applications that are installed.	**Now Assist in Contract Management** Use Now Assist in Contract Management to enhance user productivity using generative AI

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Troubleshoot and get help

- Ask or answer questions in the Legal Service Delivery community forum
- Search the Known Error Portal for known error articles
- Learn more about how to create your own apps on the developer site.
- Contact Customer Service and Support

Explore Contract Management Pro for Legal Service Delivery

Learn more about Contract Management Pro for Legal Service Delivery through a sample workflow and review the benefits it can provide.

Contract Management Pro for Legal Service Delivery overview

With the Legal Contract Management Pro for Legal Service Delivery, you can configure and automate the legal contract lifecycle by creating contract document templates, clauses, and clause variations. The legal contract lifecycle enables you to submit, review, finalize, and manage legal contract and amendment requests. The integration also supports e-signatures and external storage systems.

Contract Management Pro for Legal Service Delivery users

Users

User	Description
Contract Management Pro for Legal Service Delivery configurator	Contract Management Pro for Legal Service Delivery configurator can configure contract templates, external systems, and configuration rules.
Contract Management Pro for Legal Service Delivery administrator	Contract Management Pro for Legal Service Delivery administrator manages contract records, user roles, and system configurations.
Contract Management Pro for Legal Service Delivery fulfiller	Contract Management Pro for Legal Service Delivery fulfiller works on legal requests.
Legal User	Legal user submits legal and amendment requests and track their progress.
Contract user	Contract user initiates and tracks a contract request.
Contract fulfiller	Contract fulfiller work on contract request and initiates actions while fulfilling an assigned contract execution.

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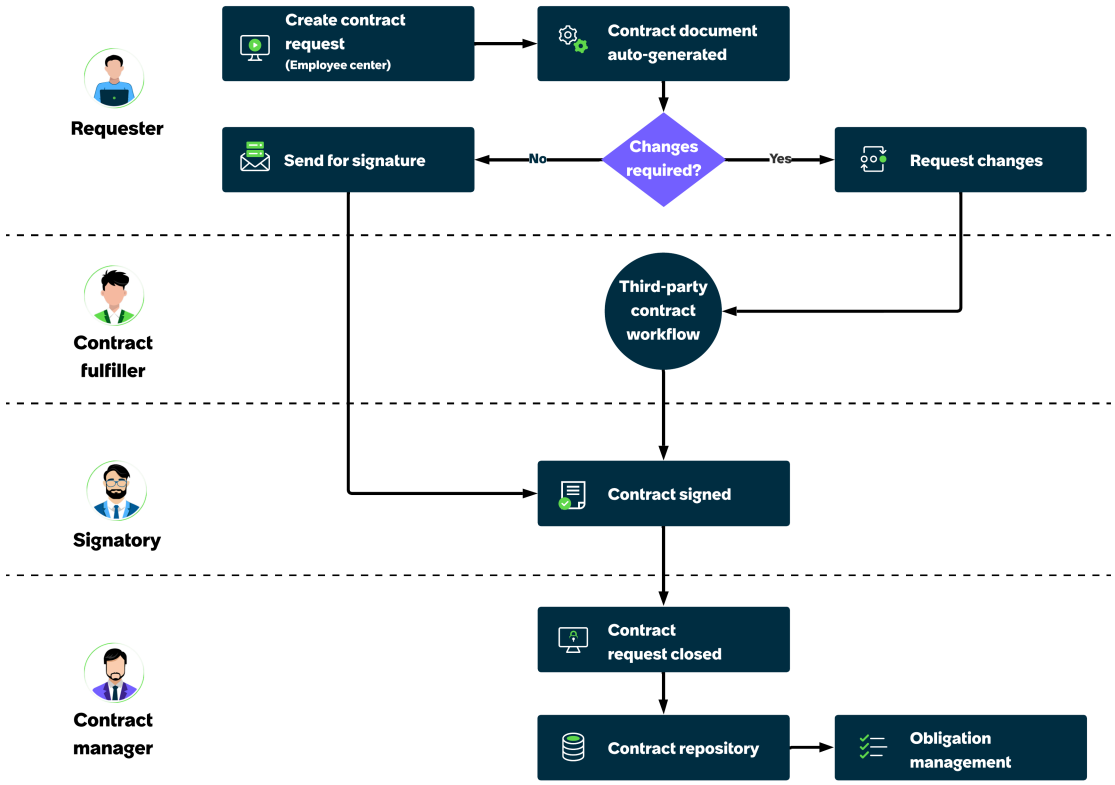
Non-disclosure agreement contract request workflow

Non-disclosure agreement request workflow



A sample workflow for a non-disclosure agreement (NDA) contract request might progress as follows:

1. Legal configurator sets up the foundation data for submitting an NDA request. For more information, see Configure Contract Management Pro for Legal Service Delivery.
2. Legal requester fills out the NDA intake request form.
3. A contract request is initiated.
4. Contract document is generated from a contract template and content is added dynamically per predefined conditions.
5. Contract user edits the requests for any changes and creates a new version of the contract document using the **Regenerate** or **Sync document** option.
6. The Contract requester views the contract document.
   a. If no changes are required, the document is sent for signature.
   b. If any changes are required, the contract requester submits a change request, which is sent to the contract fulfiller.
7. Based on the change request, the contract fulfiller can take the following actions.
   a. The contract fulfiller initiates an internal review process.
      i. The contract fulfiller submits a review task for internal review.

> **Note:** You can create parallel review tasks for the same contract document for different reviewer groups. However, you cannot create a review task for the same document with the same reviewer group if another active task already exists.

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ii. A contract reviewer group manager can assign the review task, or a contract reviewer can self-assign it.

iii. The assigned contract reviewer starts working on the contract document.

iv. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.

v. If a request for more information was submitted, the contract fulfiller shares the information.

vi. The contract reviewer reviews the document, accept or reject redlines, proposes edits, and adds comments.

vii. The contract reviewer completes the review and shares the updated contract document if available.

viii. The contract fulfiller receives updated document and makes the necessary changes based on the feedback.

- For internal storage - If any changes are required, a new document version is created after finalizing the document.
- For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.

b. The contract fulfiller initiates an ad-hoc approval from the stakeholders. If the review reveals any required changes, the changes are made and a new document revision is created.

c. Once the document is finalized, fulfiller sends document to requester.

8. The contract requester previews the generated contract and, if no changes are required, sends it to the signatories.

9. All signatories submit the required signatures.

10. The signed contract is attached to the legal request record.

11. If an external storage is configured, the signed contract is stored in it and referenced in the contract repository.

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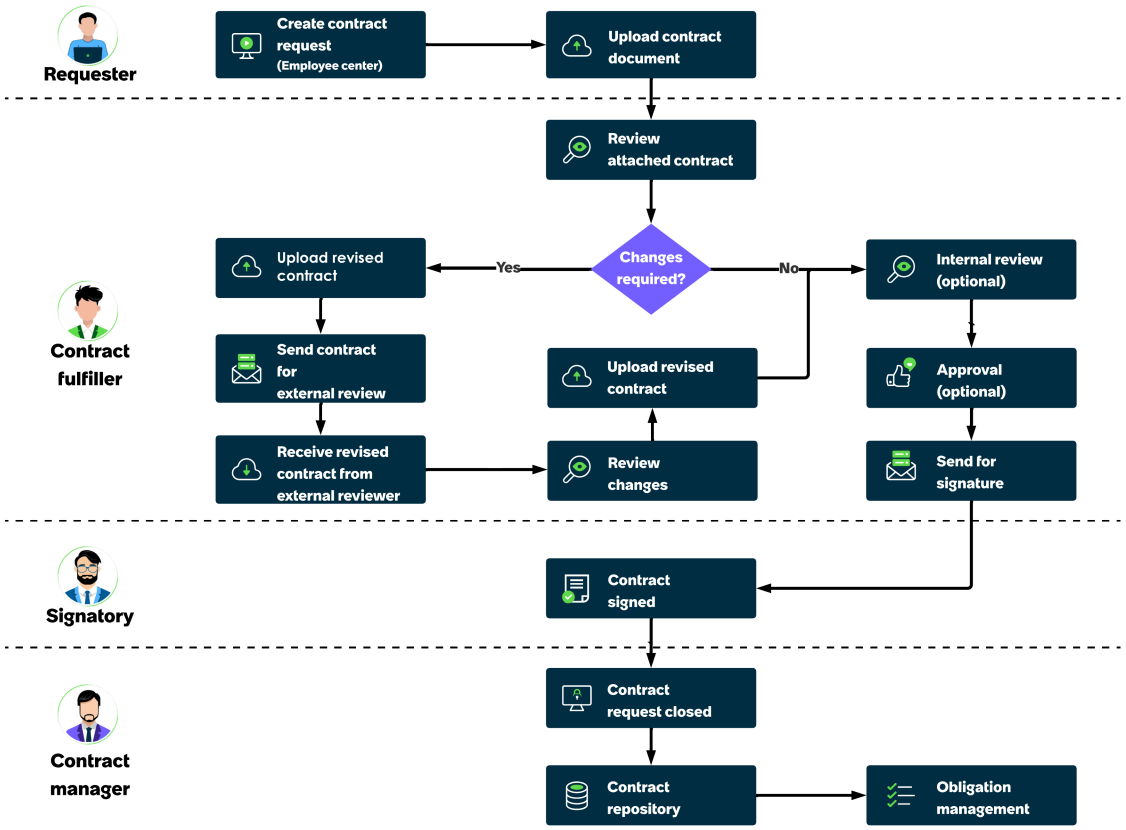
Third-party contract review request workflow

Third-party contract review workflow



As a legal fulfiller on the legal team, you work on assigned third-party review requests by completing the following activities:

1. The legal user creates a third-party contract review request.
2. The legal user uploads a single or multiple contracts and their supporting documents and classifies them.
3. The contract fulfiller reviews the contract document attached to the legal request.
4. If necessary, the contract fulfiller reclassifies the contract and supporting documents.
5. If an expert review or feedback is required from internal teams, the contract fulfiller initiates internal review process.
   a. The contract fulfiller submits a review task for internal review.

      Note: You can create parallel review tasks for the same contract document for different reviewer groups. However, you cannot create a review task for the same document with the same reviewer group if another active task already exists.

   b. The contract reviewer is assigned the review task
   c. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.
   d. If a request for more information was submitted, the contract fulfiller shares the information.
   e. The contract reviewer reviews the document, accept, reject, or proposes edits, and adds comments.

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f. The contract reviewer reviews the contract and provides feedback. If a revised document is available, it is also shared with the contract fulfiller.

g. The contract fulfiller receives updated document and makes the necessary changes based on the feedback.

- For internal storage - If any changes are required, a new document version is created after finalizing the document.
- For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.

6. The contract fulfiller uploads the revised contract to the contract request.
7. The contract fulfiller emails the revised contract document to third-party contacts.
8. View responses from third-party contacts in the activity stream of the contract request.

   Multiple iterations of revisions between your company and the third party might be necessary before the contract document is finalized by all parties. The review process may be conducted again with different reviewer groups.

9. The contract fulfiller initiates an ad-hoc approval from the stakeholders. If the review reveals any required changes, the changes are made and a new document revision is created. The contract document can be sent for signature only when it has been approved.
10. The contract fulfiller prepares for signatures by specifying the order in case of multiple contract documents, adding fields required in case of e-signature and sends the contract document for signature.
11. Signatories review the contract document.
    - If no change is required, the contract document is signed by all the signatories.
    - If any changes are required, signature is declined, the user who is working on the contract request generates a new document and resends it for signature.
12. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The requester and department members can access the signed contract document from the contracts repository.

Contract Management Pro for Legal Service Delivery benefits

Features and benefits of Contract Management Pro for Legal Service Delivery

Benefit	Feature	Users
Submit, review, finalize, and manage legal contract requests. The legal department can manage and process these submitted legal requests for contracts from a centralized location.	Contract Management Pro for Legal Service Delivery	• Legal user and contract user • Contract Management Pro for Legal Service Delivery contract fulfiller
Configure word document templates for contract to streamline and reduce the need for rework and maintain uniformity across generated contract documents. Set up dynamic content generation through	Word Document Templates	Contract configurator

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Features and benefits of Contract Management Pro for Legal Service Delivery (continued)

Benefit	Feature	Users
mappings and conditions for clauses and tables.		
Effectively manage a library of clause variations. Use clause variations to dynamically place content in a contract depending on the specified conditions.	Clause Management	Contract configurator
Use Microsoft Word documents to add content controls that act as placeholders for the content. Word templates are easier to review, mark up, and modify.	Microsoft Word add-in for ServiceNow Contracts	Contract configurator
Initiate and manage amendment requests.	Contract amendments	• Legal user and contract user • Contract Management Pro for Legal Service Delivery fulfiller
Track and manage contract obligations to help ensure compliance and minimize risks.	Obligation Management	Obligation fulfiller or Obligation user
Use Now Assist in Contract Management to analyze contracts for non-standard and missing clauses, and extract information from signed contracts to add in the contract repository.	Now Assist in Contract Management	Now Assist contract fulfiller

What to explore next

To learn more about configuring and using , see:

- Configure Contract Management Pro for Legal Service Delivery
-
- Non-disclosure agreement requests
- Third-party contract review requests
- Contract Management Pro for Legal Service Delivery reference

Contract Management Pro for Legal Service Delivery

Contract Management Pro for Legal Service Delivery enables you to submit, review, finalize, and manage legal contract requests. The legal department can manage and process these submitted legal requests for contracts from a centralized location.

Features

- Workflow for tracking, approval, and execution of requests.
- Support word contract templates for own paper.
- Support for adding multiple contract and supporting documents in a third-party contract review request.

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- Integration with external storage providers to store final signed contract documents.
- Support for electronic and wet signatures.
- Centralized repository for all signed contract documents.

Benefits

- Legal support for reviewing and finalizing non-disclosure agreements, third-party legal requests and amendment requests.
- Ability to track, prioritize, and work on multiple requests concurrently with the Legal Counsel Center.
- Contract templates for uniformity across legal contracts and reduced rework.
- Automatic notifications to monitor contracts and take timely action.
- Multiple document support for third-party contract review enables reviewing and finalizing multiple contract documents from single request.

Configure Contract Management Pro for Legal Service Delivery

Install Contract Management Pro for Legal Service Delivery and Microsoft Word add-in for ServiceNow Contracts. Set up the requirements for managing legal contract requests.

Install Contract Management Pro for Legal Service Delivery

Install the Contract Management Pro for Legal Service Delivery (sn_lg_cnt) application. The application installs demo data and related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Review the Contract Management Pro for Legal Service Delivery (sn_lg_cnt) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Contract Management Pro for Legal Service Delivery:

- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Contract Management Pro for Legal Service Delivery

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Contract Management Pro for Legal Service Delivery (sn_lg_cnt) application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

   The available versions are displayed.

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3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Install Microsoft Word add-in for ServiceNow Contracts

You can activate the Microsoft Word add-in for ServiceNow Contracts plugin (sn_cm_word_addin) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Microsoft Word add-in for ServiceNow Contracts plugin (sn_cm_word_addin) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Configure the Microsoft Word add-in for ServiceNow Contracts

As an admin, configure the Microsoft Word add-in for ServiceNow Contracts.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In Manifests**.
2. From the Office Manifests list, select **ServiceNow Contracts**.
3. Select **Download Manifest** to download the file.
4. Configure the add-in.

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System	Steps
macOS	**a.** Copy the manifest file to the `/Users/<user-id>/Library/Containers/com.microsoft.Word/Data/Documents/wef` directory. **b.** Open Microsoft Word. **c.** Open a document where you want to mark the content controls. **d.** Navigate to **Insert** > **My Add-ins**. **e.** Select **ServiceNow Contracts**. **f.** Navigate to the menu **Home**.
Windows	**a.** Publish the manifest file. For more information, see Office Add-ins with the unified [illegible] from the Microsoft Office 365. **b.** Open Microsoft Word. **c.** Open a document where you want to mark the content controls **d.** Navigate to the menu **Insert** > **My Add-ins**. **e.** Select **ServiceNow Contracts** to add the add-in. **f.** Navigate to the **Home** menu.
Microsoft Word Online	**a.** Open Microsoft Word online. **b.** Select **File** > **Get Add-ins**. The add-ins are listed. **c.** Select **More Add-ins**. The office Add-ins are listed. **d.** Navigate to **ADMIN MANAGED**. **e.** Select **Upload My Add-in**. **f.** In the Upload Add-in pop-up, browse and select the manifest file. **g.** Select **Upload**. The Upload confirmation screen is displayed.

Result

The **ServiceNow Contracts** add-in is available in the Home ribbon.

Create a legal contract intake workflow

Create a legal contract intake workflow by creating a record producer and configuring base system settings so users can request the legal department's guidance on legal contracts.

Before you begin

Role required: sn_lg_cnt.contract_config, admin

About this task

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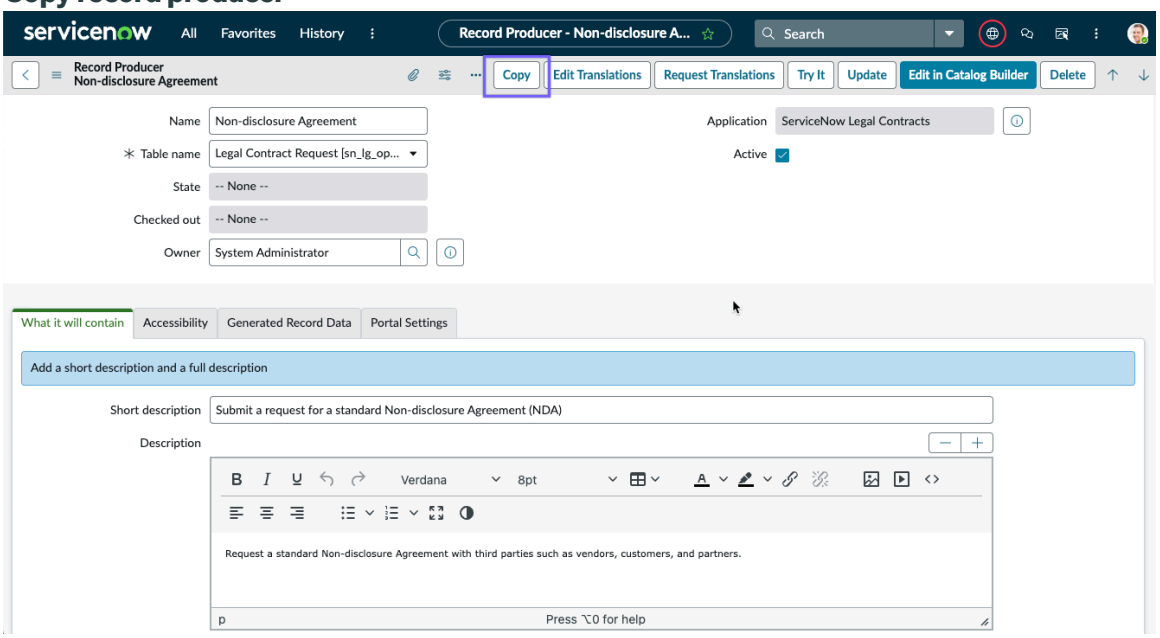
- The legal support for a contract request and amendment request works based on a workflow, so you must provide specific information while setting up the intake process.
- Three record producers are available with the base system, Non-disclosure Agreement, Third-party Contract Review, and Amendment request. You can create a record producer by copying a base system (OOB) record producer to reuse its existing configuration settings.
- To add supporting documents to an own-paper request, include the supporting documents widget in the record producer. For more information, see Add supporting document widget in own-paper record producer.
- To add external signatories to an third-party paper request, include the external signatories widget in the record producer. For more information, see Add external signatories widget in third-party paper record producer.

Procedure

1. Navigate to **All** > **Legal Administration** > **Legal Catalog** > **Record Producers**.
2. Create a record producer or copy a base system record producer for a new contract type.
   - To create a record producer, click **New**.

     For more information, see Create or modify a record producer for legal services through Classic environment.
   - To copy a base system record producer, open the record producer and then select **Copy**.

Copy record producer



3. On the record producer form, provide the following specifications for a new contract type.

   a. In the **Table name** field, select the Legal Contract Request table [sn_lg_ops_contract_request].
   The contract workflow is associated with the Legal Contract Request table.

   b. **Optional:** Create variables to add fields on the legal intake form.

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i. In the Variables related list, select **New**.

For more information on creating variables, see Create a service catalog variable.

ii. Map the variable to the corresponding column in the Legal Contract Request [sn_lg_ops_contract_request] table.

c. If the intake form requires user input for the type of contract, in the Variables related list, select **New**, and then add a variable of type Reference.
Map the variable to the Contract type table [sn_cm_core_contract_type] in the **Type Specifications** tab.

d. If the contract requires the signature of outside parties, in the Variable Sets related list, select **Edit**, and then add the **External signatory details** variable set.

e. If you want to validate the state of contract type and restrict creation of a legal request for the inactive contract type on submission of the legal request, add the **Verify if Contract type is active** script from the base system non-disclosure agreement record producer to the new record producer.
For more information on adding a catalog client script, see Create a Service Catalog client script.

Note: If you don't add this script in the new record producer, the legal request with the corresponding record producer will be created in the Cancelled state and the contract request won't be created.

4. Add an intake form in the Contracts practice area.
For more information, see Add an intake form to a practice area. Provide the following details in the respective fields.
   a. From the **Type** drop-down list, select **Request**.
   b. In the **Options** field, select **Assigned To field not mandatory**.
   c. For the third-party contract intake form, the **Generate Document from Template** option must not be enabled.
   d. For an Amendment intake form, the **Amendment request indicator** option must be enabled.
   e. From the **Request record producer** field, select the record producer created in Step 1 to associate with the intake form.
5. Modify business rule to enable data synchronization for custom intake forms.
For more information, see Configure a practice area table.
6. For Non-disclosure agreement intake form that use own-papers, create a contract template.

   For more information, see Create a contract template.

   In the **Conditions**, you must select the new category added for the new contract.
7. For Non-disclosure agreement intake form that use own-papers, configure contract template rules when a legal contract request is being created by a legal user.
For more information, see Configure contract template rules.
8. Configure the settings in the Standard Ticket Page for legal requests.

Note: The following settings must be updated in the Contract Management Pro for Legal Service Delivery application scope.

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a. Navigate to **Standard Ticket** > **Standard Ticket Configuration**.

b. Select the **sn_lg_ops_request** ticket configuration.

c. On the Ticket Configuration form, select **Documents** in the Tab Configuration related list.

d. On the Tab Configuration form, add the condition **[Category][is][<CategoryName>]** in the **Visible** field, where <CategoryName> is the category created for the new contract.

e. Select **Update**.

f. Repeat steps for the **Preview** tab configuration.

For more information, see Configure the standard ticket page.

Enable transfer of a legal request

As a admin, configure business rule to enable transfer of general legal request to contract practice area.

Before you begin

Role required: admin

About this task

The business rule should be configured only if you have custom record producer that will be used to generate a contract request. For information on how to create a custom record producer, see Create or modify a record producer for legal services through Classic environment and Create or modify a record producer for legal services through Catalog Builder.

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Open the *`Initializing Legal Contract`* business rule.
3. In the **When to run** tab, add a new OR condition for the custom record producer.
   a. Set the following filter condition: **[Category][is][<record-producer>]**.
   b. Select **AND**.
   c. Set the following filter condition: **[Questions][<record-producer>][<mandatory-question>][is not empty]**.
4. Select **Update** to save the business rule.

Set up Contracts Core

As a contract configurator, create and manage a library of clauses, clause variations and contract templates that will be used to generate contract document when a legal request is submitted.

On installing Contract Management Pro for Legal Service Delivery, Contracts Core plugin is also installed. Contracts Core enables you to effectively manage a library of clause variations, requests for electronic signature, receive notifications, and integrate with an external storage system.. Perform the following tasks to create and manage the clauses, clause variations, and contract templates that will be used for generating a contract document.

Create a contract type

Create a contract type for defining different types of legal contract requests and associate it to a contract model.

Create document template categories

Create document template categories to easily identify similar documents and find the correct document template more easily.

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Enable users to view email details in activity stream

Enable users to view the details of email sent in the activity stream.

Activate a system property to generate a certificate of completion

Activate a system property to generate a certificate of completion for electronically signed non-disclosure agreements (NDA) and third-party contracts.

Configure conditions to send reminder notifications for expiring contracts

Configure reminders for expiring contracts that each business unit can use without the need to create their own.

Configure templates for a contract and amendment request in Contract Management Pro

Create a contract template of type .docx that can be used when submitting a legal contract request to generate a standard legal contract with predefined content.

Configure dynamic clauses for contract templates

Enable dynamic customized content in contract templates through clauses that contain clause variations for preset conditions.

Configuring external applications for legal contracts

Set up external applications that provide services such as electronically signing contract documents and saving signed contracts or the documents related to legal requests in an external storage system.

The Legal Service Delivery applications use spokes from Integration Hub to integrate with external applications. The legal configurator can complete configuring these external apps after the administrator has installed and configured these spokes.

Integration with external storage systems

Configure external storage provider spokes

The administrator can use the Integration Hub to install and configure the following external storage provider spokes for saving documents attached to legal contract requests and signed contract documents:

- Google Drive spoke
- Microsoft OneDrive spoke

Configure an external storage provider

The legal configurator can set up the external storage app integrations for legal apps from **Legal Integrations**. For more information, see Configure an external storage system for legal requests and legal matters.

Integration with e-signature providers

Configure electronic signature provider spokes

The administrator can use the Integration Hub to install and configure the following electronic signature provider spokes for contract documents:

- Adobe Acrobat Sign spoke
- Docusign spoke

Set up the electronic signature provider app

The legal configurator can set up the electronic signature app integrations for legal apps from **Legal Integrations**. For more information, see Configure an e-signature provider for legal contracts.

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Configure an external storage system for legal contracts

Configure an external storage system to store signed contract documents.

Before you begin

Ensure that the administrator has installed and set up spokes for the external storage system you want to configure.

Google Drive spoke v1.3.0 or later version

For more information on the setup and creating the Google Drive account, see Set up Google Drive spoke.

Microsoft OneDrive spoke v2.1.0 or later version

For more information on the setup and creating the Microsoft OneDrive account, see Set up Microsoft OneDrive spoke.

Role required: sn_lg_cnt.contract_admin

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Integrations** > **Integrations**.
2. Create or modify an external app configuration.
   - To create an external app configuration, click **New**.
   - To modify an existing external app configuration, open the external app configuration from the list.
3. On the Integration Type page, click the **External Storage** link.
4. On the form, fill in the fields.

External Storage form

Field	Description
Name	Name of the external app configuration.
Description	Description of the external app configuration.
Active	Option for marking the configuration for external storage as active.
Table	Table in which the signed legal contracts information is stored. Select the **Legal Contract Request [sn_lg_ops_contract_request]** table. **Note:** If you select a different table, you must associate a corresponding flow.
Condition	Filter conditions to determine which integration app to use. For example, say you've already set up the Google Drive external storage integration and want only NDA contracts to be stored there, you can define the condition as follows: **[Category] [is] [NDA]** and then select the Google Drive.

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Field	Description
Execution order	Order in which an external storage system is used for storing contract documents. The system with the lower-order value is chosen first.
App	External storage system such as Google Drive or Microsoft OneDrive.
Folder structure	Filepath to store the signed contract documents in the external storage system. Define a folder structure using a combination of static text and dynamically generated text from the selected fields. For example, the folder structure `Legal/${company}/Contracts/${number}`, where, ○ `Legal` and `Contracts` are the static texts ○ `${company}` and `${number}` are the fields chosen from the **Select variables** list. These field variables are dynamically replaced by the values in each field while saving a document.

5. Save the external app configuration.
   - Save a new external app configuration by clicking **Submit**.
   - Save the changes to an existing external app configuration by clicking **Update**.

   The external storage configuration is saved.
6. Click **Publish**.

Result
The configuration for the external storage system is published and is ready to be used for storing contract documents.

Configure an e-signature provider for legal contracts

Configure an electronic signature provider to enable users to sign contract documents electronically.

Before you begin
Ensure that the administrator has installed and set up spokes in Integration Hub for the electronic signature providers that you want to configure.

Adobe Sign spoke v2.8.0 or later version

For more information on the setup and synchronizing the Adobe Acrobat Sign group, see Synchronize Adobe Acrobat Sign group with ServiceNow.

DocuSign spoke v4.1.x or later version

For more information on the setup and creating the Docusign account, see Set up Docusign eSignature spoke using authorization code grant.

Role required: sn_lg_cnt.contract_admin

Procedure
1. Navigate to **All** > **Contracts Core** > **Contracts Integrations** > **Integrations**.
2. Create or modify an external app configuration.

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- To create an external app configuration, click **New**.
- To modify an existing external app configuration, open the external app configuration from the list.

3. On the Integration Type page, click the **Electronic Signature** link.
4. On the form, fill in the fields.

Electronic Signature form

Field	Description
Name	Name of the external app configuration.
Description	Description of the external app configuration.
Active	Option for marking the external app configuration as active.
Table	Table in which the contracts data is stored. Select the **Legal Contract Request [sn_lg_ops_contract_request]** table.
Condition	Filter conditions to determine which integration account to use. For example, say you've already set up the Docusign electronic signature account and want only NDA contracts to use that account for signatures, you can define the condition as follows: **[Category] [is] [NDA]** and then select the Docusign in the **Integration provider** and its associated account in **Account**.
Execution order	Order in which an integration account is used for electronic signature of contract documents. Integration account with the lower-order value is chosen first.
App	Electronic signature provider such as Adobe Acrobat Sign or Docusign.
Account	Account number associated with the electronic signature provider. This field appears only when **Docusign** is selected from **Integration provider**.
Group	Group associated with the electronic signature provider. This field appears only when **Adobe Acrobat Sign** is selected from **Integration provider**.
Attributes	Additional configuration items based on your electronic signature provider. Provide the following details: **Host Url**: Add the URL of the selected electronic signature provider that enables you to finalize or update the contract document before sending them to signatories. For example, use Web UI URL for **Adobe Acrobat Sign** or use **Docusign** UI for DocuSign.

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5. Save the external app configuration.
   - Save a new external app configuration by clicking **Submit**.
   - Save the changes to an existing external app configuration by clicking **Update**.

   The external app configuration is saved.
6. Click **Publish**.

Result
The configuration of the e-signature app is published and is ready to be used for the electronic signing of contract documents.

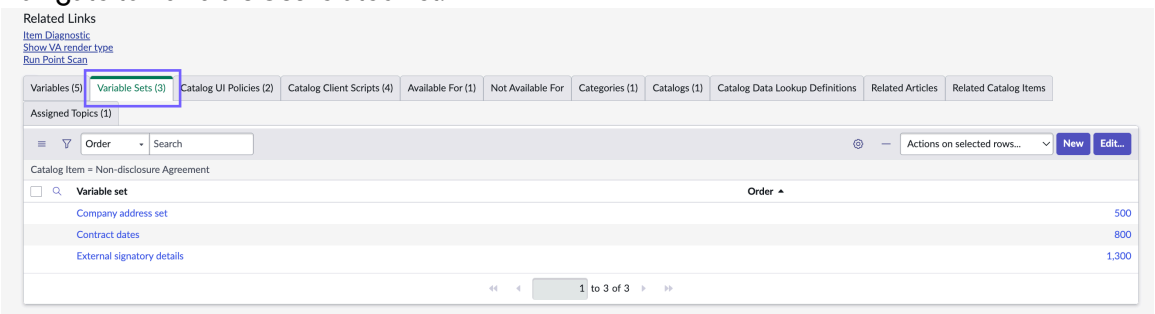
Add supporting document widget in own-paper record producer

Add the supporting document widget to a record producer to enable uploading of supporting documents.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Legal Administration** > **Legal Catalog** > **Record Producers**.
2. Select the own-paper record producer (Example: Non-disclosure Agreement) for which you want to add the supporting document widget.
3. Configure the variable set.

   a. Navigate to **Variable Set** related list.



   b. Select **Edit**.

   c. Add the widget by moving **Upload Contract Documents** and **Upload documents optional interaction** from the Collection to the Variable set list.

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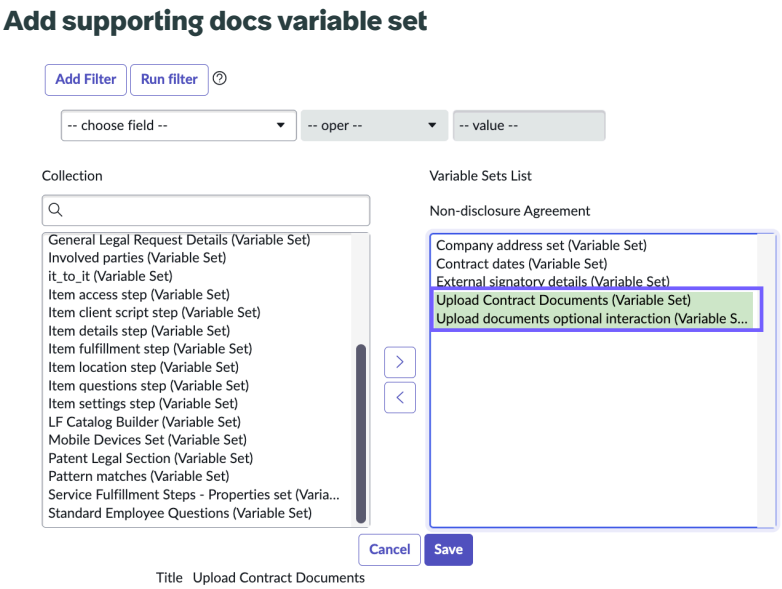

d. Select **Save**.

4. Configure variables for **Upload documents optional interaction** variable set.



a. Select **Upload documents optional interaction** from the variable set related list.

b. Select **Variables** related list.

c. Set the value for *internal_type_of_paper* to own_paper and for *internal_contract_type* give sys_id of the contract type associated with the record. To get sys_id, go to contract type record, select and hold (or right-click) on the header and select **Copy sys_id** Example: If you're adding the widget to the Non-disclosure agreement record producer, add the sys_id of the Non-disclosure agreement contract type.

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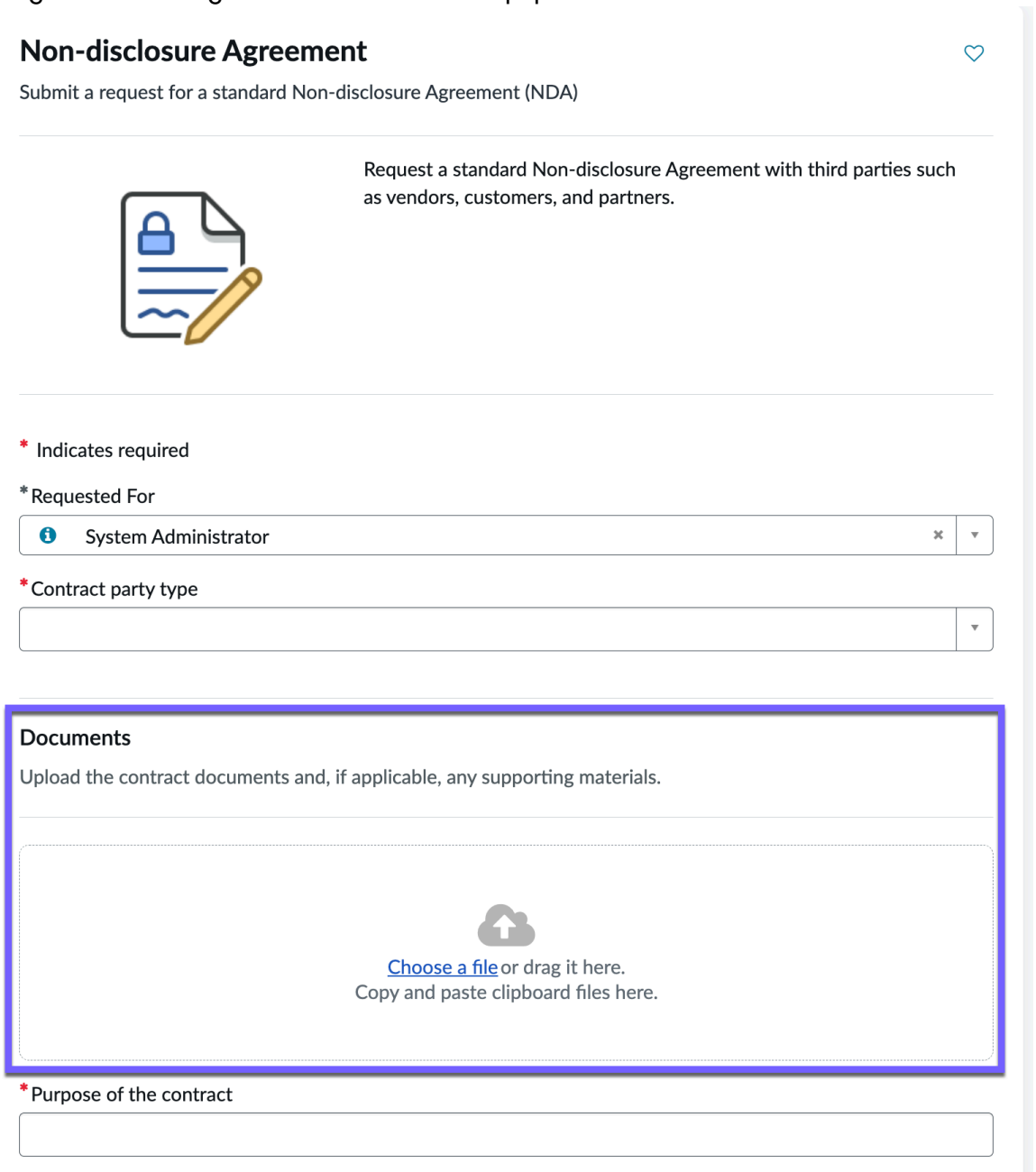
The supporting document widget is available in the own-paper record



producers.

5. Customize the standard ticket page to display the supporting document related list.

   a. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.

   b. Select the record with table sn_lg_ops_request.

   c. Navigate to **Tab configurations** related list.

   d. Select **Supporting Documents**.

   e. In the script, find the following code block.

```
answer = gs.nil(contractExecutionGr) ?
 false : contractExecutionGr.request_type ==
```

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```
 sn_cm_core.CMConstants.CONTRACT_REQUEST_TYPE.AMENDMENT_REQU
EST ||
 contractExecutionGr.contract_configuration.document_type ==
 sn_cm_core.CMConstants.DOCUMENT_TYPE.THIRD_PARTY_CONTRACT;
```

f. Replace it with the following code block.

```
answer = gs.nil(contractExecutionGr) ? false : true
```

g. Save the tab configuration.

6. Enable the supporting document widget in edit request mode.

a. Navigate to **All** > **System Definition** > **Business Rules**.

b. Search for *`Contract-generation variable change`* and open the record.

c. Navigate to **Advanced** related list.

d. In the script, find the following code block.

```
       msg = gs.getMessage("The legal request has been
updated, and a new contract document revision will be
generated based on the modified values.");
                gs.addInfoMessage(msg);
                var externalSigners =
JSON.parse(current?.variables?.external_signatory_details +
'' || '[]');
                initiatePayload = {
                    ...initiatePayload,
                    externalSigners: externalSigners
                };
```

e. Add the following code block after the located code block.

```
contractCoreUtils.createOrUpdateDocumentsFromWidget({
                    ...commonArgs,
                    contractDocuments:
current.variables.contract_documents + '',
                });
```

f. Save the business rule.

A supporting document widget is available while editing an own-paper based request.

Add external signatories widget in third-party paper record producer

Add the external signatories widget to a record producer enabling you to add external signers.

Before you begin
Role required: admin

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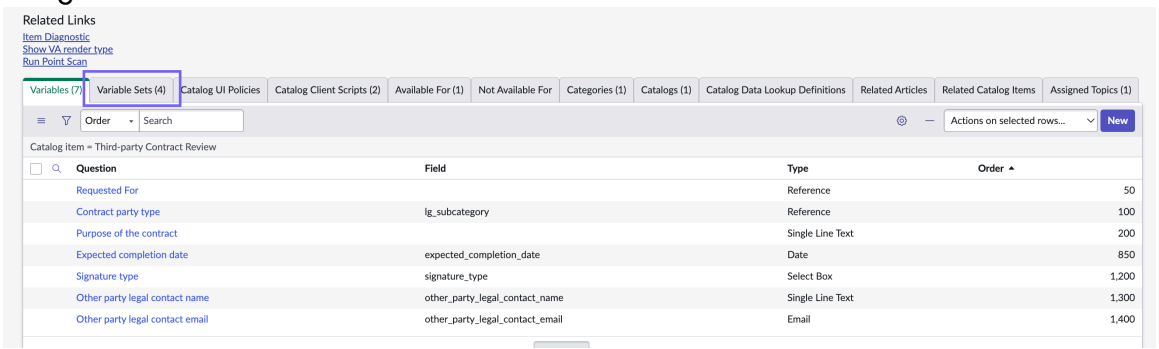
Procedure

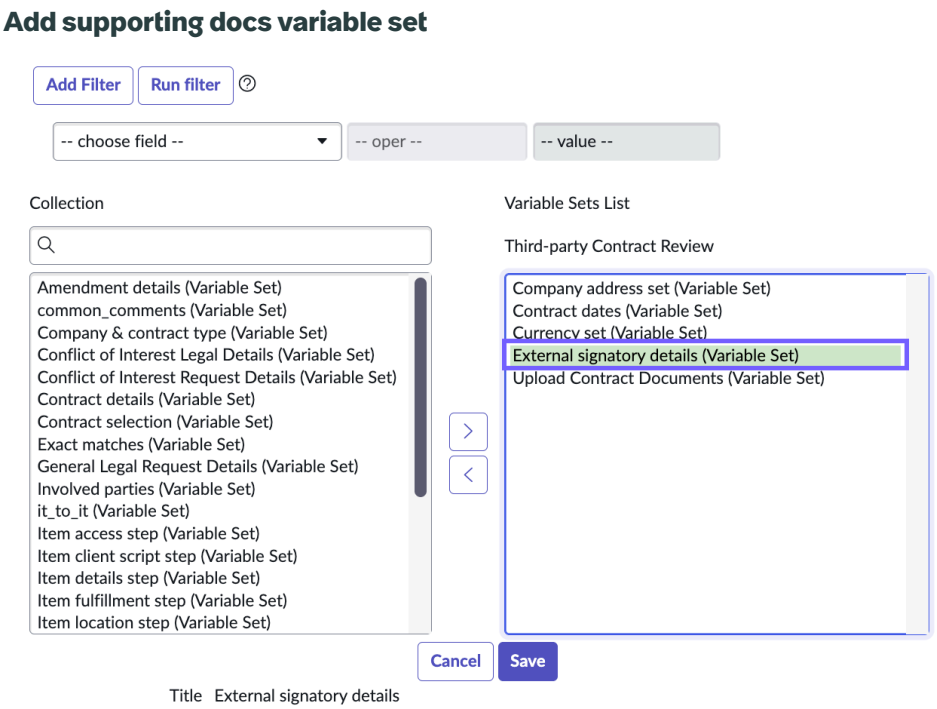
1. Navigate to **All** > **Legal Administration** > **Legal Catalog** > **Record Producers**.
2. Select the third-party paper record producer (Example: Third-party Contract Review) for which you want to add the supporting document widget.
3. Configure the variable set.

   a. Navigate to **Variable Set** related list.



   b. Select **Edit**.

   c. Add the widget by moving **External signatory details** from the Collection to the Variable set list.



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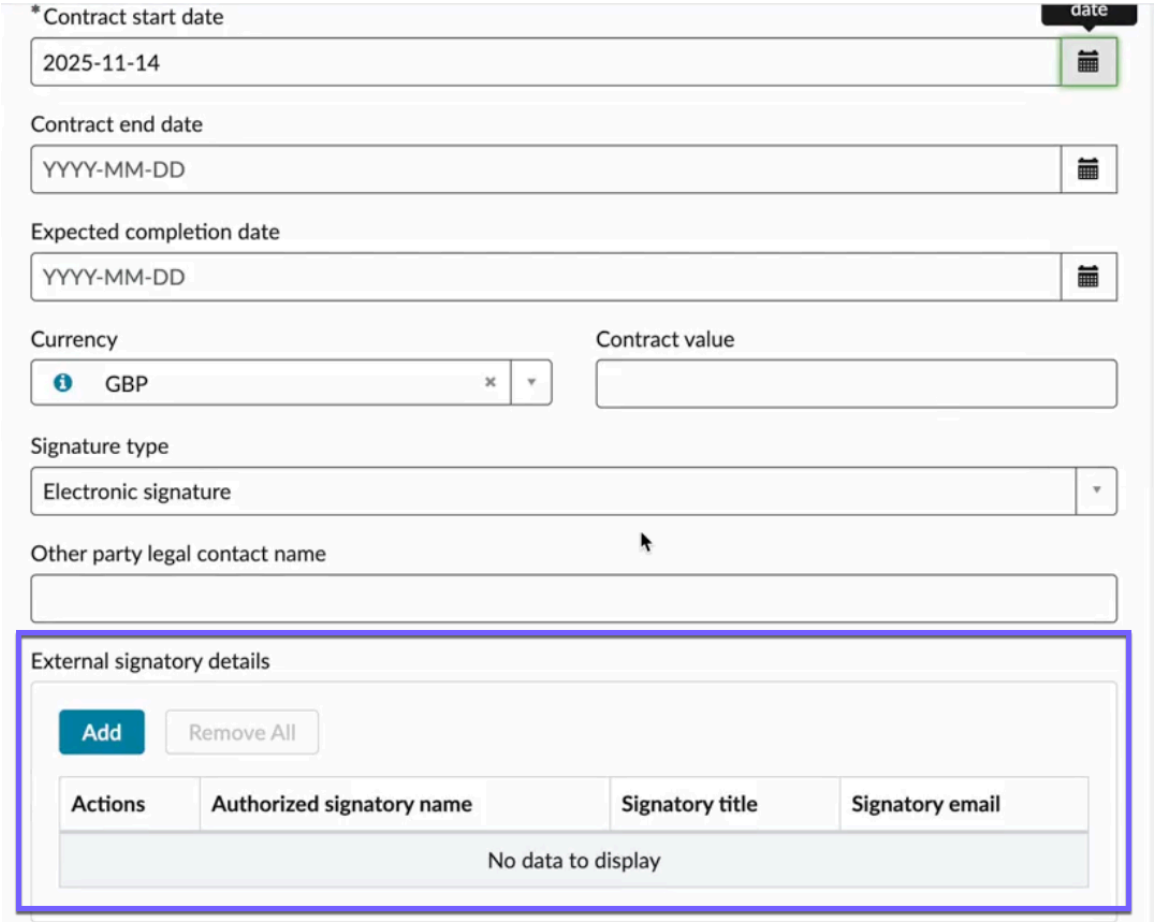
d. Select **Save**.



4. Enable the external signatories widget in edit request mode.

a. Navigate to **All** > **System Definition** > **Business Rules**.

b. Search for *`Contract-generation variable change`* and open the record.

c. Navigate to **Advanced** related list.

d. In the script, find the following code block.

```
          if (documentType == 'third_party_contract') {
                var contractRequestResponse =
contractExecutionUtils.createOrEditContractRequest(current,
documentType, contractType, signatureType, null, 'edit');
                if (contractRequestResponse.success ==
false) {
                    current.comments = response.message;
                    current.update();
                    return;
                }

contractCoreUtils.createOrUpdateDocumentsFromWidget({
                    ...commonArgs,
                    contractDocuments:
current.variables.contract_documents + '',
```

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```
                    });
```

e. Add the following code block after the located code block.

```
 var externalSigners =
 JSON.parse(current?.variables?.external_signatory_details +
 '' || '[]');
contractExecutionUtils.processSigners(current,
 externalSigners, contractRequestResponse, documentType);
```

f. Save the business rule.

External signatories document widget is available while you are editing third-party paper based request.

Use Contract Management Pro for Legal Service Delivery

Use Contract Management Pro for Legal Service Delivery to submit legal requests for non-disclosure agreement (NDA) and third-party contracts.

Non-disclosure agreement requests

Employees can submit legal requests for creating non-disclosure agreement (NDA) contracts with third parties such as vendors, customers, and partners. The legal department can manage and process these requested changes from a centralized location.

Features

- Contract templates with metadata and business rules for selecting the most relevant template for a request.
- Microsoft Word format contract templates to enable easier editing for the contract fulfiller.
- Self-service capability for creating and executing standardized NDA contracts.
- Electronic signature integrations with Adobe Acrobat Sign and Docusign.
- Wet signature support for manual signing.
- External storage integrations with Google Drive and Microsoft OneDrive for storing signed contract documents.
- Centralized legal contracts repository containing the metadata of signed contract documents.

Non-disclosure agreement contract request workflow

When a requester submits a legal request, an NDA contract document is created using a standard contract template based on the information from the request. The information from the request is inserted at the appropriate places in the template.

Because contract documents are in Microsoft Word format, reviewing, editing, and finalizing the contract documents is easier than documents in PDF or HTML format.

If the generated NDA document doesn't require any changes, the requester can send it to the signatories for an electronic or wet signature. After all signatories have signed the contract document, it's stored on the ServiceNow instance or an external storage system based on the configuration. The requester and legal department members can access the signed contract document from the Contracts repository.

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A sample workflow for a non-disclosure agreement (NDA) contract request might progress as follows:

1. Legal configurator sets up the foundation data for submitting an NDA request. For more information, see Configure Contract Management Pro for Legal Service Delivery.
2. Legal requester fills out the NDA intake request form.
3. A contract request is initiated.
4. Contract document is generated from a contract template and content is added dynamically per predefined conditions.
5. Contract user edits the requests for any changes and creates a new version of the contract document using the **Regenerate** or **Sync document** option.
6. The Contract requester views the contract document.
   a. If no changes are required, the document is sent for signature.
   b. If any changes are required, the contract requester submits a change request, which is sent to the contract fulfiller.
7. Based on the change request, the contract fulfiller can take the following actions.
   a. The contract fulfiller initiates an internal review process.
      i. The contract fulfiller submits a review task for internal review.

      Note: You can create parallel review tasks for the same contract document for different reviewer groups. However, you cannot create a review task for the same document with the same reviewer group if another active task already exists.

      ii. A contract reviewer group manager can assign the review task, or a contract reviewer can self-assign it.
      iii. The assigned contract reviewer starts working on the contract document.
      iv. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.
      v. If a request for more information was submitted, the contract fulfiller shares the information.
      vi. The contract reviewer reviews the document, accept or reject redlines, proposes edits, and adds comments.
      vii. The contract reviewer completes the review and shares the updated contract document if available.
      viii. The contract fulfiller receives updated document and makes the necessary changes based on the feedback.
         - For internal storage - If any changes are required, a new document version is created after finalizing the document.
         - For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.
   b. The contract fulfiller initiates an ad-hoc approval from the stakeholders. If the review reveals any required changes, the changes are made and a new document revision is created.
   c. Once the document is finalized, fulfiller sends document to requester.
8. The contract requester previews the generated contract and, if no changes are required, sends it to the signatories.
9. All signatories submit the required signatures.

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10. The signed contract is attached to the legal request record.
11. If an external storage is configured, the signed contract is stored in it and referenced in the contract repository.

Submit a legal request for a non-disclosure agreement

Submit a legal request for a non-disclosure agreement (NDA) with third parties such as vendors, customers, or partners.

Before you begin

- The contract type must be active.
- Role required:
  - sn_lg_ops.legal_user and sn_cm_core.contract_user

Procedure

1. Access the non-disclosure agreement intake form.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center**. **b.** Select **Legal** > **Browse all Legal** from the header. **c.** Search for and open the **Non-disclosure agreement** request item.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**. **c.** Search for and open the **Non-disclosure agreement** request item.

2. On the form, fill in the fields.

Non-disclosure agreement intake form

Field	Description
Requested For	User for whom you want to submit a legal request. This field is visible only when you are a legal fulfiller with the sn_lg_cnt.contract_fulfiller role.
Contract party type	Category of the third party entity with whom the contract has to be signed.
Purpose of the contract	Purpose of the agreement. Example: Non-disclosure agreement for new business investments.
Company	Legal name of the third party with whom you are making an agreement. If the company name isn't listed, select the **[Company not listed]** option and enter the name in the **New company legal name** field.

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Field	Description
Address	Mailing address of the third party.
Country	Country of the third party.
Contract start date	Start date of the contract period.
Contract end date	End date of the contract period.
External signatory details	List of people from the selected third party who should sign the agreement.
Signature type	Type of signature. ○ Electronic signature: The signatory electronically signs the contract. ○ Wet signature: The signatory manually signs the physical version of the contract. The default signature type is Electronic Signature.

3. **Optional:** Modify the list of signatories.
   - (Optional) To add a signatory, select **Add** and provide the signatory's details.
   - (Optional) To modify a signatory's information, select the Edit row icon (✎) on the signatory's row and update the details.
   - (Optional) To remove a signatory, select the Remove row icon (✖) on the signatory's row.
4. Select **Submit**.
5. **Optional:** Modify the request details or manage signatories by selecting **Actions** and then selecting **Edit Request**.
   This option is available only if the request state is Draft or Work in progress. For more information, see Modify a non-disclosure agreement legal request.

Result

- A legal request is submitted and a contract request is created for generating contract documents.
  - If there are no validation errors, a contract request is created in the Work in progress state.
  - If there is a validation error due to incorrect signatory information, a contract request is created in Draft state.
- If a contract template rule or contract configuration is not available, a contract request will not be created. The contract configurator should correct the configuration to trigger contract request creation. The legal request remains in Draft state.
- Version 1.0 of a contract document is generated and listed in the **Contract Document** tab of the contract request.
- The contract document generation process involves:
  - Using the correct contract template based on contract template rules.
  - Replacing the metadata with data from the request.

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- Replacing the signatory information.
- Placing the content of the clauses in the contract document according to the clause variation rules.

- Internal signatories based on the template are also populated in the generated document. For more information, see Define an internal signatory rule.

Note:

- If more signatories have been added in the request than are needed for the contract as defined in the contract template, only the default number of signatories are necessary for signing the contract. Other signatories are marked as Not Considered.
- If fewer signatories are included in the request than are required for the contract, you can add more signatories.

A record for each external signatory is created in the Signer [sn_cm_core_signer] table.

For more information on how to view and track a legal request, see View and track non-disclosure agreement requests as a legal user.

Modify a non-disclosure agreement legal request

As a requester, modify the legal request for a non-disclosure agreement (NDA).

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_cm_core.contract_user

About this task

Note the following:

- You can modify a request until it is in the Draft or Work in progress state.
- You can't modify the **Signature type** field.

Procedure

1. Open an NDA legal request.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** from the header.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **My Requests** from the header.

2. Select the request that you want to edit.
3. On the request page, from the Actions menu, select **Edit Request**.
4. Edit the fields that you want to modify.
5. Select **Save** to update the record.

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Result

- Based on the change in values in the request form, the contract document is updated as follows:
  - The correct contract template is used based on contract template rules. For example, The contract template rules can be defined for specific countries. If a change is made in the Country value, the contract document is updated per the contract template defined for the updated value of the country.
  - Metadata and signatory information is replaced with data from the modified request.
  - Content is inserted in the clauses in the contract document per the clause variation rules.
- A new document revision is created and the file name is appended with the version number.
- The Contract status is marked as Ready revision.

View and track non-disclosure agreement requests as a legal user

View the details of a non-disclosure agreement request after it has been submitted and track the activities in the request.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

Procedure

1. Open a legal request.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** option on the header menu. **c.** Open your submitted non-disclosure agreement request.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted non-disclosure agreement request.

2. View the details of the contract request.

Contract request details

Information type	Tab
Contract document	Contract Documents

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Information type	Tab
	○ If the request uses internal storage for attachments, access the document by selecting it. ○ If the request uses external storage, access the document by selecting the link.
Signatories	Signatories
Request details	Request Details **Note:** If legal fields have been modified in a workspace, the updated values and previous values are displayed in the corresponding variables in the **Request Details** tab in Employee Center.
Signed contract document	Legal Contract
Attachment documents in internal storage	Preview

3. **Optional:** Track the activities in the request and post messages for the fulfiller working on it by accessing the **Activity** tab.

Work on NDA legal requests

As a member of the legal contracts support team, work on the legal request. Upload the revised document to the request and send the document to the requester from within the request.

Before you begin

The practice area lead or group manager should have assigned you the request. If not, you can open the request to assign it to yourself or someone in the group.

Role required: sn_lg_cnt.contract_fulfiller

About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure

1. Assign a legal request to yourself or to someone in your assignment group.
   For more information, see Assign a legal request
2. Start working on a legal request.
   a. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
   b. Select the list icon ( ).
   c. Select **Legal requests** option.
   d. Select **Assign to me**.
   e. Open the legal request from the list.
   f. Select **Start work**
   The state of the legal request updates to Work in progress.
3. In the **Lists** tab, navigate to **Legal Requests** or **Contract Requests**.

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Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a contract request to work on.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a contract request to work on.

4. **Optional:** If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

   Note: Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal request.
5. **Optional:** In the legal request, update the **Watch list**, **Collaborators**, and **Requested for**. Any changes done to the **Watch list**, **Collaborators**, and **Requested for** are synced to the contract request.
6. **Optional:** Update a company name by selecting its name in the **Company** field.
   If the company name is not listed in the **Company** field, select the **Add new company name** check box and then enter the company name in the **New company legal name** field.
7. **Optional:** If you have opened a contract request from the **Legal requests** listing, select the **Contract Requests** tab.
8. **Optional:** Initiate an ad hoc approval for the contract document revision when an approval is required from other stakeholders.
   For more information, see Initiate an ad hoc approval for a contract document revision.
9. **Optional:** Add internal or external signatories to the contract request by accessing the **Signatories** tab and selecting **Add**.

   Note: You can add signatories in NDA legal requests only when the contract is generated from a template configured with signature blocks

Option	Steps
Internal	**a.** In the **Internal Signer** field, enter the name of the signer. The fields **Authorized signatory name**, **Signatory**, and **Signatory email** are automatically populated. **b.** In the **Order** field, enter the order in which the contract should be sent to the signer. The order value should be unique **c.** Select **Add**.
External	**a.** In the **Authorized signatory name** field, enter the external signer's name. **b.** In the **Signatory** field, enter the external signer's title.

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Option	Steps
	c. In the **Signatory email** field, enter the external signer's email address. **d.** In the **Order** field, enter the order in which the contract should be sent to signers for an e-signature. The order value should be unique. **e.** Select **Add**.

10. **Optional:** Remove the signatories from the contract request by accessing the **Signatories** tab, selecting the signatory, and selecting **Remove**.

    Note: You can remove signatories in NDA legal requests only when the contract is generated from a template configured with signature blocks

11. **Optional:** In the **Signatories** tab, select **Sync signatories** to update the contract document with the latest signatory details.
    For more information, see Updating and synchronizing signatories

    Note: This option is not available on Contract Management Pro starting with version 1.2.1.

12. In the Activity section, review the changes requested by the requester and make the necessary changes in the contract document.
13. Upload the revised contract document.

    a. In the **Contract documents** tab, select **Create Revision**.

    b. In the Create revision dialog box, select the source of the updated contract and upload a new document revision.

    Computer

    Select this option to upload a file from your system. The **Attachment** field appears upon selecting this option. Select **Attach File** and upload the updated contract from your system.

    Activity stream

    Select this option to select a document from the activity stream. The **Document** field appears upon selecting this option. Select the document in the activity stream.

    The activity stream includes documents attached while requesting changes for a contract or documents received through email.

    External storage

    Select this option if external storage is enabled. The **Document** field appears upon selecting this option. Select the updated contract from external storage.

    c. **Optional:** Add work notes to provide any information on the attached document.

    d. Select **Create**.

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The attached document is added to the request. The revision number of the latest document is one higher than the previous document revision number. The document is listed in the **Contract document** tab.

14. When a legal request changes, create a new version of the contract document with updated metadata and signatories and retain the changes in the previous version by selecting **Sync document**.
    For more information, see Synchronize a non-disclosure agreement document after modifying a self-served contract request (Contract Management Pro 1.2.1).

    Note: This option is available on Contract Management Pro starting version 1.2.1

15. **Optional:** For any changes in legal request, select **Regenerate** option to create a new version of the contract document with updated metadata and signatories, and discard the changes in the previous version.
    For more information, see Regenerate contract document after modifying request.
16. Set up an email to stakeholders to request to have the completed contract document reviewed and the changes confirmed.

    a. Select **Compose Email**.

    b. In the **New Email Draft** tab, add recipients' email addresses in the **To**, **CC**, and **BCC** fields as appropriate.
    The **CC** field is automatically populated with the requester's email address.

    c. Enter the subject of the email in the **Subject** field.
    The short description of the request is populated by default.

    d. In the **Attachments** field, select **+Add File**.

    e. Select whether the file source is your computer or an attachment to a record and select the file to be attached.
    If you've marked a contract document revision as Ready, it's attached to the email by default.

    f. Either enter your own message in the email body or copy and paste the content from an email response template into the email body.

    Using response templates, you can insert predefined content into the email body. Select the response template icon ( ) and find an appropriate response template based on the subject of your email. Copy and paste the template's content into the email body.

    Note: Only response templates configured for the email channel are available to use. For more information, see Response templates configured for email channel.

    g. Either send the email immediately or indicate that it should be sent later.

    - To send the email immediately, select **Send email**.
    - To indicate that the email should be sent later, select **Save as draft**.

      If you choose to save the email as a draft, you can modify it later. If a newer document revision has been posted, you have to substitute that revision for the document you attached.

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Synchronize a non-disclosure agreement document after modifying a self-served contract request (Contract Management Pro 1.2.1)

Synchronize the contract document for non-disclosure agreements contract requests to create a new revision of the document with updated metadata and signatories while retaining the changes made in the previous version of the contact document.

About this task

Note: The **Sync document** option is available only starting with Contract Management Pro version 1.2.1

You can synchronize a contract document only when the contract request is in the Work in progress state.

Note: Tables are not updated when you use the **Sync document** option. You must regenerate the document to update the tables. For more information, see Regenerate contract document after modifying request.

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_cm_core.contract_user
- sn_cm_core.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Navigate to **Legal Requests**.
4. Open a legal request.
5. Navigate to the **Contract Requests** tab and open the request.
6. In the **Contracts documents** tab, select **Sync document**.

Result

A new contract document revision is created with the update metadata and signatories. The changes made in the previous revision are retained.

Regenerate contract document after modifying request

As a legal user or legal fulfiller, regenerate the contract document for non-disclosure agreement contract requests when the legal request has been modified.

About this task

When the parent request is modified, you can use the **Regenerate** option to generate a new contract document from the contract template with the latest metadata, signatories, and tables. You can regenerate a contract document only when the State is Draft or Work in progress.

Any changes made to the signatory information in the contract request will be overwritten by the signatory information from the contract template. If the signatory information is incomplete or inconsistent after regeneration, you can manually update the signatories. For more information, see Updating and synchronizing signatories.

You can regenerate a contract document only when the State is Draft or Work in progress.

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Before you begin

Role required:

- sn_lg_ops.legal_user and sn_cm_core.contract_user
- sn_cm_core.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Navigate to **Legal Requests**.
4. Open a legal request.
5. Navigate to **Contract request** and open the request.
6. Select the More Actions icon ( ) and select **Regenerate**.

Result

The results of the regeneration depends on the initial state of the document:

- Draft: Replaces the existing contract document revision.
- Work in progress: Creates a new contract document revision and any changes made in the previous revision is discarded.

Note that although contract fulfillers can see all contract document revisions, a contract user can see only the latest revision.

Updating and synchronizing signatories

As a legal user or fulfiller, update and sync signatory details when the contract submission has failed, or contract document cannot be sent due to incomplete signatory information.

Note: If you are using Contract Management Pro version 1.2.1 and the document is stored on your ServiceNow instance, signatories are automatically updated when you send the document for signature or resubmit the contract request.

Resolve the failure to send contract documents for signature (starting Contract Management Pro 1.2.1)

Update signatory details in an external contract document when there is a failure in sending the document for signature due to a mismatch between the signatory information in the contract request and the contract document.

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_cm_core.contract_user
- sn_cm_core.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Navigate to **Legal Requests**.
4. Open a legal request.

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5. Navigate to the **Contract Requests** tab and open the request.
6. Navigate to the **Activity** stream to learn the validation error.
7. Select the **Signatories** tab.
8. Select the signatory and update the information.
9. Select **Save** to save the signatory details.
10. Select the **Contracts documents** tab.
11. Select **Sync document**.
    A new contract document revision is created with the updated signatory information.
12. Select **Save** to save the contract request.
13. Select **Send for signature.**
    A message appears displaying details of the contract document that is sent for signature.
14. Select **Send for signature** on the confirmation message.

Resolve the failure to submit a self-serve contract

As a legal user, resubmit a contract request that was not submitted due to incomplete signatory information by updating and syncing signatory information.

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_cm_core.contract_user
- sn_cm_core.contract_fulfiller

About this task

If the signatory information is missing, the contract request will be saved as a draft and won't be submitted. Update the signatories and synchronize them to resolve the failure.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Navigate to **Legal Requests**.
4. Open a legal request.
5. Select the **Contract Requests** tab and open the request.
6. Select the **Activity** stream to know the validation error.
7. Select the **Signatories** tab.
8. Select the signatory and update the information.
9. Select **Save** to save the signatory details.
10. Select the **Signatories** tab.
11. Select **Sync signatories**.
    The contract document is updated with the new signatory details.
12. Select **Save**.
13. Select **Resubmit**.

Result

The contract request is resubmitted and the state changes from Draft to Work in progress.

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Resolve an error during send for signature

As a legal user or fulfiller, update and synchronize signatory details when send for signature fails due to a mismatch between signatory information in the contract request and contract document.

Before you begin

Role required:

- sn_lg_ops.legal_user and sn_cm_core.contract_user
- sn_cm_core.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Navigate to **Legal Requests**.
4. Open the legal request.
5. Navigate to the **Contract Requests** tab and open the request.
6. Navigate to the **Activity** stream to find the validation error.
7. Select the **Signatories** tab.
8. Select the signatory and update the information.
9. Select **Save** to save the signatory details.
10. Select the **Signatories** tab.
11. Select **Sync signatories**.
    The contract document is updated with the new signatory details.
12. Select **Save**.
13. Select **Send for signature.**
    A message appears displaying details of the contract document that is sent for signature.
14. Select **Send for signature** on the confirmation message.

Result

A new contract document revision is created with the latest signatory details and sent for signature. The Activity stream displays details of the contract document that is sent for signature.

Reviewing and finalizing a self-served contract document

Review and finalize the contract document generated after the self-serve contract request is submitted, then send it for signature.

After submitting a self-serve contract request, a contract document is generated based on the contract template and contract template rules. A workflow for reviewing and finalizing a self-serve contract document might progress as follows:

1. The contract user reviews the contract document.
   - If no changes are required, the contract user submits the document for signature.
   - If changes are necessary, the contract user submits a change request to the contract fulfiller and the process continues.
2. An email notification with the details of the change request is sent to the contract fulfiller.
3. The contract fulfiller updates the document and creates a document revision.

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4. Contract fulfiller gets ad-hoc approval from the stakeholders.
5. Contract fulfiller sends the contract document back to the contract user.
6. An email notification is sent to the contract user that the document has been updated.
7. The contract document can shared with stakeholders and on finalizing can be sent for signature.
8. If additional changes are required, the contract user submits the change request again and this process continues until the document is acceptable and can be sent for signature.

Review a contract document in Employee Center

As a contract user, review a contract document and submit a change request to the contract fulfiller if changes are required in the contract document.

Before you begin

Role required: sn_cm_core.contract_user and sn_lg_ops.legal_user

About this task

- Change requests can be submitted only by the user who has initiated the contract request or for whom it was initiated.
- The Contract state is Work in progress.
- The **Request changes** option isn't available if a previously submitted change request isn't completed.

Procedure

1. Open a legal request.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** option on the header menu. **c.** Open your non-disclosure agreement re quest.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Counsel Center** **b.** Select the List icon ( ). **c.** Select **View all requests**. **d.** Open your non-disclosure agreement re quest.

2. Select the **Contract documents** tab.
3. Access the contract document.

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Location	Action
From internal storage	**a.** Select **Preview document**. **b.** In the drop-down list, select the contract type. **c.** Select **Preview** to view the document.
From external storage	Select the link in the **URL** column. The document opens from the external stor age.

4. Review the contract document.

Review result	Action
No change is required	Send the document for signature. For more information, see Send a non-disclo sure agreement document for signature.
Changes are required	Submit a change request. **a.** From the Actions drop-down list, select **Re quest Changes**. **b.** Attach a file in the **Attachment document** field. **c.** Describe the desired changes in the **Com ments** box. **d.** Select **Submit**. The change request is submitted for the contract document. The change request de tails and the attached document are added to the activity stream. ○ When a contract request has been as signed to a contract fulfiller, its status up dates to Changes requested and the Con tract state remain in Work in progress. ○ If a contract request isn't assigned to any one, its state changes to New and it is listed as unassigned in the contract workspace for a contract fulfiller to work on.

Work on a contract change request

As a contract fulfiller, review the change request, update the contract document and send it back to the contract user.

Before you begin

Role required: sn_cm_core.contract _fulfiller and sn_lg_cnt.contract_fulfiller

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Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Select **Legal Requests**.
4. Go to the contract request listing.
   - For assigned contract request - Select **Assigned to me**.
   - For unassigned contract request - Select **Unassigned**.
5. Select the legal request for which the change request has been submitted.
   - When you have opened a request from the unassigned list, assign it to yourself or the group manager has to assign it to a user.
   - When the legal request is assigned, select **Start work**.
   - You can get the details of the change request from the Activity stream or the notification email received.
6. Select Contracts request tab and open the request.
   You can get the details of the change request from the Activity stream or the notification email received.
7. Select the Contract documents tab.
8. Access and edit the contract document.

Choice	Steps
Download contract document from the internal storage	**a.** Select **Preview document**. **b.** In the drop-down list, select the contract type. **c.** Select **Preview**. **d.** Select the Download icon ( ). **e.** Edit the downloaded document.
Download contract document from the external storage	**a.** Select the URL. The document opens from the external storage. **b.** Download the contract document **c.** Edit the downloaded document.
Edit the contract document directly from the external storage	**a.** Select the URL. The document opens from the external storage. **b.** Edit the document directly from the external storage. The document is automatically saved in the external storage. **c.**

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9. If you have downloaded the document from the storage, upload the updated contract document by creating a revision.

   a. Select **Create revision**.

   b. In the Create revision from drop-down list, select a storage type and upload the new document.

      - **In the workspace**: Select **Attach File** and upload the document.
      - **Activity stream**: In the **Document** field, select the document that is displayed based on attachments in the activity stream.

        The documents attached while requesting changes for a contract and the documents received through inbound emails are available in the Activity stream.

      - **External Storage**- In the Document field, select the document. This option is displayed only if external storage is configured.

10. **Optional:** Get approval of the updated document from stakeholders.
    For more information, see Initiate an ad hoc approval for a contract document revision.
11. Return the contract document to the change requester.

    a. Select **Send document**.

    b. Select **Send document** on the confirmation screen.

Result

The document is sent back to the user and the Contract status updates to Document ready to indicate that the contract document has been updated according to the change request.

Initiate an ad hoc approval for a contract document revision

Initiate an ad hoc approval for a contract document revision from a user or a user group.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

You can assign these approvals to any user or user group in your organization who have the sn_lg_cnt.contract_fulfiller role. When you initiate an approval, the approvers receive an email notification and can review and act on the approval.

Note: If a contract document revision already has a pending approval record, you cannot initiate another approval for the same item.

Procedure

1. Navigate to **All** > **Legal request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, navigate to **Legal Requests** or **Contract Requests**.

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Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a contract request to work on.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a contract request to work on.

4. **Optional:** If you have opened contract request from the **Legal requests** listing, select **Contract request** tab.
5. In the **Approvers** tab, click **Initiate Approval**.

   You can also initiate an approval by clicking the more actions button ( ) and selecting **Initiate Approval**.
6. On the Initiate Approval dialog box, fill in the fields.

Initiate Approval dialog box

Field	Description
Contract type	Contract type for which you need to initiate approval.
Document revision	This field is automatically populated with the latest document revision.
Approval by	Approval required at user level or user group level. ○ **User**: Get approval from an individual user. ○ **User group**: Get approval from a set of users. The **Select user** field is replaced by the **Select user group** field.
Select user	User or user group who must approve the item. **Note:** Users or user groups with the sn_lg_cnt.contract_fulfiller role are listed. ○ If you selected **User** in the **Approval by** field, select a user from whom the approval is required. ○ If you selected **User group** in the **Approval by** field, select a user group from whom the approval is required.
Approval note	Note for the selected user or user group.

7. Click **Initiate**.

Result

Assigned approvers are added in the **Approvers** tab based on the following conditions:

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- If you selected **User** in the **Approval by** field, an approval record is created for the selected user.
- If you selected **User group** in the **Approval by** field, an approval record for each user in the selected user group is created. Anyone from the group can approve.

The assigned approvers get an email notification with a link to open the record for review and action.

The approval details appear under the **Approvals** tab on the Standard Ticket page.

Send a non-disclosure agreement document for signature

After a non-disclosure agreement contract document has been reviewed and finalized, send the document for signature.

Before you begin

The contract document must have been reviewed and finalized, and the contract status must be set to Document ready. For more information, see and Review a contract document in Employee Center and Work on a contract change request.

Role required: sn_cm_core.contract_user and sn_lg_ops.legal_user

Procedure

1. Open a legal request.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** option on the header menu. **c.** Open your submitted non-disclosure agreement request.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted non-disclosure agreement request.

2. Select the **Contract documents** tab.
3. Select **Send for signature**.

Note: If a message states that the signatories are not in sync, update and sync them before sending the document for signature.

- If you are using Contract Management Pro 1.2.1, see Resolve the failure to send contract documents for signature (starting Contract Management Pro 1.2.1).
- If you are using an earlier version of Contract Management Pro, see Resolve an error during send for signature.

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A message appears displaying details of the contract document that is sent for signature.

4. Select **Send for signature** on the confirmation message.

Result

The document is sent for signature to the specified signatories. The activity stream displays details of the contract document that is sent for signature.
The contract state and contract status updates to Awaiting Signature. For more information, see Signature workflow for a request.

Signature workflow for a request

Contract Management Pro for Legal Service Delivery supports electronic signature or wet (manual) signature for a contract request.

- Electronic Signature: Enables signatories to sign the contract document electronically. For more information, see Configure an e-signature provider.

  If you want to generate a certificate of completion, you must select the **Electronic Signature** as signature type in the contract request. For more information, see Activate a system property to generate a certificate of completion.

- Wet Signature: Enables signatories to sign the contract document manually. You can then upload the signed document to a contract request. For more information, see Upload a manually signed contract document.

Electronic signature workflow

- Send the finalized document to the signatories for signing.
  - The state and contract status updates to Awaiting Signature and the electronic signature flow is triggered as configured in Configure an e-signature provider for legal contracts.
  - An email notification that the contract document is available for signature is sent to the first signatory. The email contains a link to the contract document that the signatory can open and sign the document through the Docusign or Adobe Acrobat Sign electronic signature provider.

    The signatories will receive signature request email according to the order set in the signatories tab.

  - The signatory fields—such as Name, Title, and Email—are not pre-filled in the contract document before it is sent for signature. These fields will be populated by the electronic signature provider when the signatory access the document to sign it.
- Signatories can sign or decline the contract document.

Signatories action on the contract document

Signatories action	Workflow
All the signatories choose to do an electronic signature	○ First signatory signs the contract document If there is more than one signatory,the contract document is sent to the next signatory in the order. The status of the current signatory in the request updates from Pending Signature to Signed. The status of the next signatory

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Signatories action	Workflow
	updates from Not Started to Pending Signature. ○ After the last signatory has signed the document, the contract repository record is created and the signed document is attached to it. For contract requests containing multiple contract documents, the signed contract document is split into individual documents and attached to the contract repository record for the respective contract type. The state of the requests updates to Contract Signed.
One or more signatories decide to do a wet signature	○ One or more signatories decided to do a wet signature instead of electronic signature. ○ The wet signed contract document in PDF format is shared with the contract fulfiller. ○ The contract fulfiller uploads the signed document, selects the signatories who have shared the wet signed contract document and proceeds with the signature worklow by sending the document to the next signatories. The status of the signatory in the request updates from Pending Signature to Signed. The status of the next signatory updates from Not Started to Pending Signature. The signature type is updated to Mixed signature after all the signatories have signed the document. ○ After the last signatory has signed the document, the contract repository record is automatically created and the signed document is attached to it. For contract requests containing multiple contract documents, the signed contract document is split into individual documents and attached to the contract repository record for the respective contract type. The state of the requests updates to Contract Signed.
The document is declined by the signatory.	An email notification that the signer has declined to sign the document is sent to the requester.

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Signatories action	Workflow
	The Signatory status in the request updates to Declined. The State changes to Work in progress and the Contract status changes to Signing Declined.
The signature request is not delivered to a signatory.	The Signatory status in the contract request changes to Delivery failed. The state of the contract request changes to Signature delivery failed. An email notification is sent to the contract fulfiller informing them that the signature request could not be delivered. A notification appears on the contract request informing about the undelivered signature request and the available actions for the fulfiller. ○ For Docusign, you can update the signatory's information and retry, cancel the signature process to restart it, or upload a manually signed contract. ○ For Adobe Sign, you can cancel the signature process to restart it, or upload a manually signed contract.
The contract document is resent for signature.	For contract request fulfilled by the contract user: A contract user can submit a change request. The contract fulfiller works on the change request and sends the updated document back to the contract requester. The updated contract document is sent for signature by the contract user. For contract request fulfilled by contract fulfiller: The contract fulfiller creates a document revision manually or by using regenerate option and resends the document for signature.

If the system property *sn_cm_core.enable_executed_contract_audit_certificate* is set to true, the certificate of completion is generated and attached to the contract repository record.

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Wet signature workflow

- Send the finalized document to the signatories for signing.
  - The state and contract status are updated to Awaiting signature.
  - An email notification is sent to the first signatory in order and the contract documents are attached as PDFs in the email.

    The current signatory is placed in the To field of the email. The contract fulfiller, the person who opened the contract, the person for whom the contract was requested, and the initiator of send for signature action are placed in the CC field.
- Signatories accept or decline the document.

Signatories action on the contract document

Signatories action	Workflow
The current signatory accepts the document and there are pending signatories	○ The signatory prints the contract document,signs it, and then returns it to the signature requester. ○ On receiving the signed contract document, the contract fulfiller uploads the signed contract and sends the document to the pending signatories.
The signatory declines the document	The signatory sends the document back to the requester for necessary correction. The signatories and the contract fulfiller can collaborate and finalize the contract document.
All the signatories have signed the document	○ On receiving the contract document signed by all the signatories, contract fulfiller uploads the signed contract document in PDF format. ○ The contract document is added to the repository after it is uploaded. For self-served contracts, the state of the request updates to Closed complete and the contract status updates to Contract signed. For non-self-served contracts, the state of the request and the contract status updates to Contract signed. To close the contract request, select Close complete. For more information, see Upload a manually signed contract document.

Modify signatories when the signature workflow is in progress

Modify Signatories options enables you to add, remove, edit, or reorder pending signatories #while a signature workflow is in progress. Initiating this action pauses the signature workflow #for a duration defined by the system property*#maximum_signature_pause_duration*.

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To continue the signature workflow after making changes, use the#**Resume Signature** option to resume the workflow.

The workflow might progress as follows:

- Use **Modify signatories** option to modify the signatories.
- Add, remove, modify, or reorder signatories.

  Note:

  - For signature block-based contract templates, you can add, modify, remove, and reorder actions, whereas for participant based templates, only modify and reorder actions are enabled.
  - Modify signatories option is available in wet signature workflow and Electronic signature workflow with Docusign electronic signature provider integration.

- Select **Resume signature** to resume the signature workflow once modifications are complete.

  Note: If the signature workflow is not resumed within the configured time duration, any changes made to the signatories are reverted, and the signature workflow resumes from its previous state.

- Signature request email notifications are sent to the signatories.
- After the last signatory has signed the document, the contract repository record is created and the signed document is attached to it.

For more information, see Modify signatories and Resend signature request.

Contract document access

Access to a contract document is based on the following user roles and conditions:

- A contract fulfiller can view and update contract documents
- Only a contract administrator can delete contract documents.
- Requesters can view only the contract documents for which they submitted the contract request.
- Users added to the watch list can view only contract documents for contract requests they have added.

While generating the contract repository record, mapped fields and their values are validated for data type and correctness. If validation errors are found, an email notification is sent to the contract fulfiller. The email also displays the list of fields that haven't been copied into the final contract document and the link to the contract repository record. The fulfiller then opens the record using the link and corrects the values to resolve the validation errors.

Upload a manually signed contract document

Upload the wet signed contract document you have received from the signatories. You need to upload a contract document for a wet signature workflow or if one of the signatories in the electronic workflow decides to do a wet signature.

About this task

The state of the non-disclosure agreement should be Awaiting signature.

Before you begin

You can only upload a contract document in PDF format.

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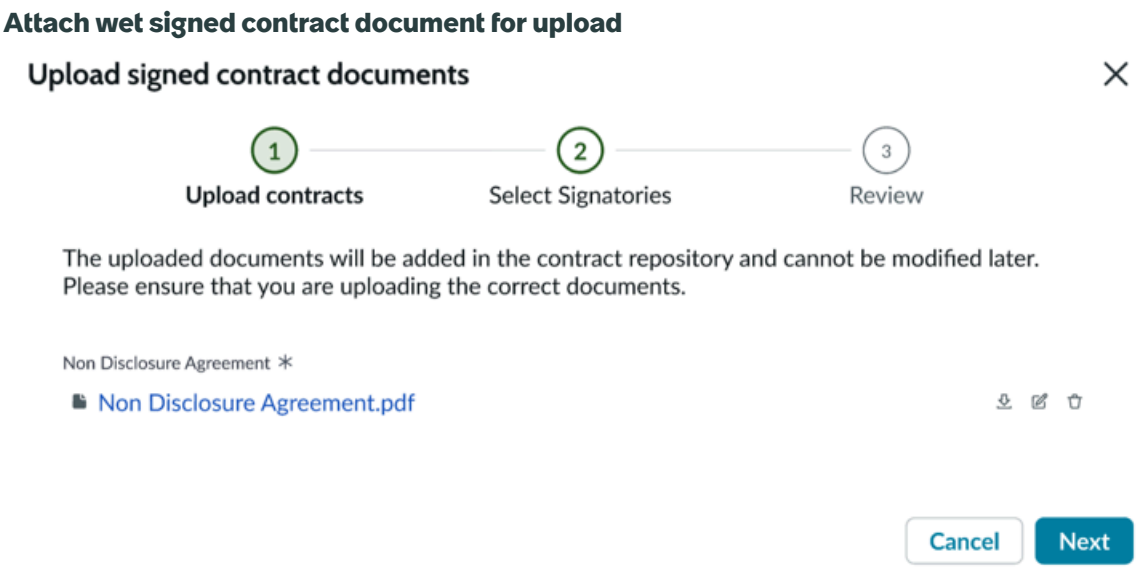
Role required: sn_lg_cnt.contract_fulfiller and sn_cm_core.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal request** > **Legal Counsel Center**.
2. Select the list icon ( ).
3. In the **Lists** tab, navigate to **Legal Requests** or **Contract Requests**.
4. **Optional:** If you have opened a contract request from the **Legal requests** listing, select the **Contract request** tab.
5. Select **Upload signed contract documents**.
6. Attach the wet signed contract document received from the signatories.
   a. In the Upload contracts step, select **Attach File**.
   b. Select the contract document and select **Open**.



   The contract document is attached.

   c. Select **Next**.
7. Select the signatories who have signed and share the contract document.

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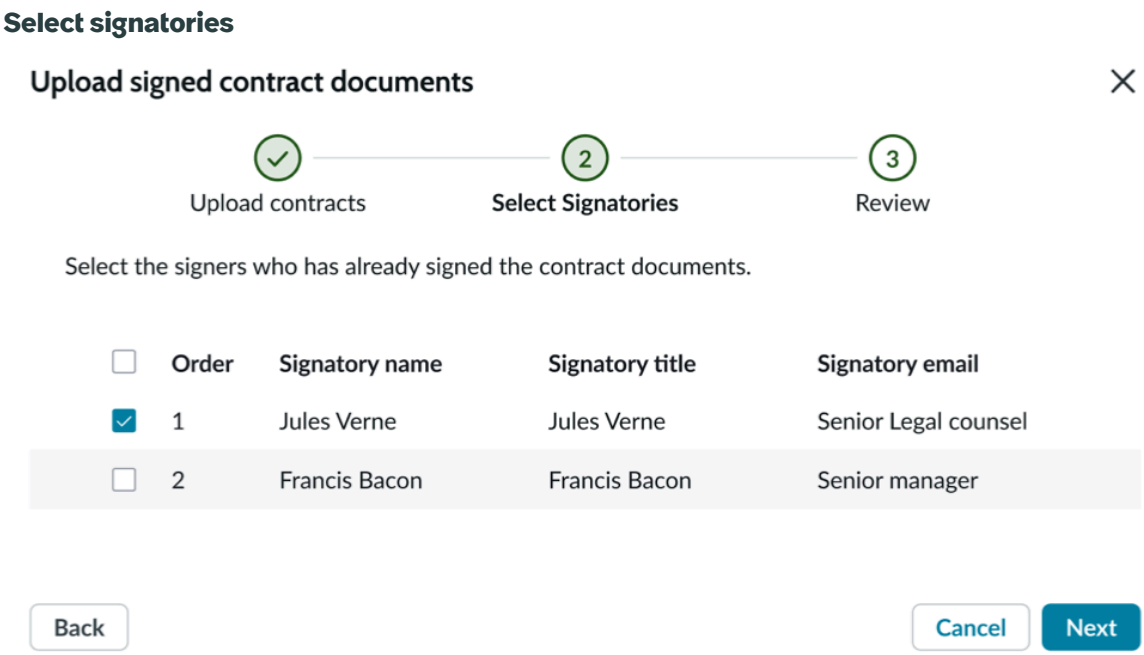
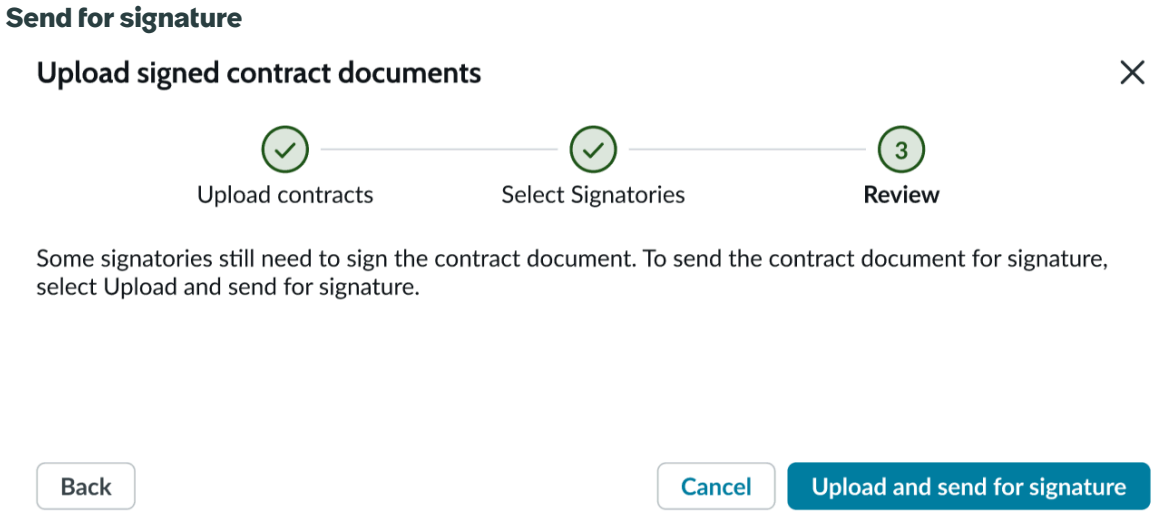
a. Select the check box for the signatories who have signed the contract document.

b. Select **Next**.



8. Review and upload the contract document.

- Upload the signed contract document - If all signatories have signed the contract document, select **Upload** to upload the document.
- Send the uploaded document to the next signatories - If some of the signatures are pending, select **Upload and send for signature** to upload and send the document to the pending signatories.



Result

When all the signatories have signed the contract document, it is uploaded to the contract request. A contract repository record is created and the signed contract document is attached to it.

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An email with the attached final contract document is sent to the signatories.

For Non-disclosure agreement legal requests, the state of the request updates to **Closed complete** and the contract status updates to **Contract signed**.

For Third-party contract review requests, the state of the request and the contract status updates to **Contract signed**. To close the contract request, select **Close complete**.

Modify signatories

Modify signatories while a signature workflow is in progress.

Before you begin

- Configure the system property *maximum_signature_pause_duration* to define the time duration for which the signature workflow is be paused after you select to modify signatories option. The minimum value that can be set is 8 hours and the maximum is 24 hours. For more information, see Configure signature pause duration when modifying signatories.
- Modify signatories option is only available for wet signature workflow and Electronic signature workflow with Docusign electronic signature provider integration.

Role required: sn_cm_core.contract_fulfiller

About this task

Use the **Modify signatories** option to pause the signature process when you want to add, modify, reorder or remove a signatory. If the signature process is not resumed within the configured time duration (as defined by the system property *maximum_signature_pause_duration*), any changes made to the signatories are automatically reverted, and the signature process resumes from its previous state.

- You can select the option to modify signatories only when the contract request is in Awaiting signature state.
- You can only remove, modify, or reorder signatories who have not yet signed the contract document.
- When the signature process is paused, signatories with pending signature task will not be able to access the contract document from the already received signature request email.
- For signature block based contract requests, you can perform add modify, remove and reorder actions.
- For participant based contract requests, you can only perform modify and reorder actions.

Procedure

1. Navigate to your workspace.
2. Open the contract request which is in Awaiting signature state.
3. Select **Modify signatories**.
   - The Contract Status updates to Signature Paused.
   - The activity stream records the modify signatories action.
4. Select **Modify** on the confirmation screen.
5. Navigate to **Signatories** tab.
6. Modify signatories.

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Action	Steps
Add signatories	**a.** Select **Add**. **b.** Select **Internal** or **External**. **c.** Fill in the details. **d.** Select **Add**. **Note:** The **Add** option is not available for self-served contract requests using contract templates with partici pant-based signatories.
Edit signatory	**a.** Select a signatory from the list by clicking on the signatory or der. Signatory details page is displayed. **b.** Modify the fields. **c.** Select **Save**.
Reorder signatories	**a.** Select **Reorder**. Reorder pop-up is displayed. **b.** For the signatory you want to reorder, select and hold the Re order icon ( ). **c.** Drag the signatory to the required order. **d.** Select **Reorder**.
Remove signatories	**a.** Select the signatory by checking the corresponding checkbox. **b.** Select **Remove**. **Note:** The **Remove** option is not available for self-served contract requests using contract templates with partici pant-based signatories.

Result
The signature process is paused and signatories modified.

What to do next
Resume the signature process after you have modified the signatories. For more information, see Resume signature process.

Resume signature process

Resume the paused signature process with the modified signatories.

Before you begin
Role required: sn_cm_core.contract_fulfiller

About this task
Use the **Resume signature** option to resume the signature process. If the signature process is not resumed within the configured time duration (as defined by the system property

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maximum_signature_pause_duration), any changes made to the signatories are automatically reverted, and the signature process resumes from its previous state.

Resume signature option is only available for wet signature workflow and electronic signature workflow with Docusign electronic signature provider integration.

Procedure

1. Navigate to your workspace.
2. Open the contract request that is in Signature paused status.
3. Select **Resume signature**.
4. Select **Resume** on the confirmation screen.

Result

- The Contract Status is updated to Awaiting signature.
- If the current signatory is different from before the pause, a notification is sent for signature request.
- The activity stream records the resume signature action.

Resend signature request

Resend signature request functionality enables contract fulfillers to manually trigger signature request when needed.

Before you begin
Role required: sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the contract request that is in Awaiting Signature status.
3. Select **Resend signature request**.
4. Select **Resend** on the confirmation screen.

Result
Notification is resent to the current signatory.

Cancel a wet signature process for non-disclosure agreement legal requests

As a legal user, cancel the wet signature process for contract documents in NDA legal requests that have been sent to signatories.

Before you begin
Role required: sn_cm_core.contract_user and sn_lg_ops.legal_user

About this task
The state of the contract request should be Awaiting signature.

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Procedure

1. Open a legal request.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** in the header menu. **c.** Open the non-disclosure agreement re quest.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Ser vice Portal** **b.** Select **My Requests** in the header menu. **c.** Select **View all requests**. **d.** Open the non-disclosure agreement re quest.

2. On the Standard Ticket page, from the **Actions** menu, select **Cancel signature**.
3. On the confirmation window, select **Cancel signature**.

Result

The contract status updates to Signature cancelled, and a notification email is sent to all signatories.

Third-party contract review requests

Employees can submit legal requests for review of third-party contracts by the legal team.

Features

Third-party review requests include the following features:

- Ability to submit a third-party document for review.
- Ability to upload multiple contract and supporting documents for review.
- Get review and feedback from the internal subject matter experts on contract documents
- Electronic signature integrations with Adobe Acrobat Sign and Docusign.
- Support for storing contract documents in your ServiceNow instance or external storage systems such as Microsoft OneDrive and Google Drive.
- Legal contracts repository containing the metadata of signed contract documents.
- Support for a configurable system property to generate a certification of completion.

Third-party contract review request workflow

As a legal fulfiller on the legal team, you work on assigned third-party review requests by completing the following activities:

1. The legal user creates a third-party contract review request.
2. The legal user uploads a single or multiple contracts and their supporting documents and classifies them.
3. The contract fulfiller reviews the contract document attached to the legal request.

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4. If necessary, the contract fulfiller reclassifies the contract and supporting documents.
5. If an expert review or feedback is required from internal teams, the contract fulfiller initiates internal review process.
   a. The contract fulfiller submits a review task for internal review.

      Note: You can create parallel review tasks for the same contract document for different reviewer groups. However, you cannot create a review task for the same document with the same reviewer group if another active task already exists.

   b. The contract reviewer is assigned the review task
   c. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.
   d. If a request for more information was submitted, the contract fulfiller shares the information.
   e. The contract reviewer reviews the document, accept, reject, or proposes edits, and adds comments.
   f. The contract reviewer reviews the contract and provides feedback. If a revised document is available, it is also shared with the contract fulfiller.
   g. The contract fulfiller receives updated document and makes the necessary changes based on the feedback.
      - For internal storage - If any changes are required, a new document version is created after finalizing the document.
      - For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.
6. The contract fulfiller uploads the revised contract to the contract request.
7. The contract fulfiller emails the revised contract document to third-party contacts.
8. View responses from third-party contacts in the activity stream of the contract request.

   Multiple iterations of revisions between your company and the third party might be necessary before the contract document is finalized by all parties. The review process may be conducted again with different reviewer groups.

9. The contract fulfiller initiates an ad-hoc approval from the stakeholders. If the review reveals any required changes, the changes are made and a new document revision is created. The contract document can be sent for signature only when it has been approved.
10. The contract fulfiller prepares for signatures by specifying the order in case of multiple contract documents, adding fields required in case of e-signature and sends the contract document for signature.
11. Signatories review the contract document.
    - If no change is required, the contract document is signed by all the signatories.
    - If any changes are required, signature is declined, the user who is working on the contract request generates a new document and resends it for signature.
12. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The requester and department members can access the signed contract document from the contracts repository.

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For e-signatures, after all signatories have signed the contract document, it's stored on the ServiceNow instance or an external storage system. If an external storage is configured, the signed contract is stored in it and referenced in the contract repository.

For wet signatures, after all signatories have signed and returned the contract document, the legal fulfiller uploads the signed contract to the contract request. The document is then stored in the contract repository.

The requester and legal department members can access the signed contract document from the Legal Contracts repository.

Create a legal request for a third-party contract review

Create a legal request for the legal team to review a third-party contract or the terms and conditions provided by the third party.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

About this task

Procedure

1. Access the third-party review intake form either from the Legal Service Portal or from Employee Center.

Method	Action
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select **Service Catalog**. **c.** Search for and open the **Third-party review** request item.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center** **b.** Select **Legal** > **Browse all Legal** from the header. **c.** Search for and open the **Third-party review** request item.

2. On the form, fill in the fields.

   For a description of the field values, see Third-party Contract Review form

3. Add single or multiple contract and supporting documents to be reviewed by the legal department.

   a. In the Documents section, attach documents.

Method	Actions
Choose the file	**a.** Select **Choose a file**. **b.** Select the files to attach and select **Open**.

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Method	Actions
Drag the file	Drag files from your local computer into your browser window to attach them to the current record.

4. Classify the attached documents.

Classification	Actions
Contract document	In the **Document type** list, select the contract type that is relevant to the attached docu ment. Only active contract types are displayed in the list. **Note:** At least one document should be classified as a contract document.
Supporting document	In the **Document type** list, select **Supporting Documents**.

Note: Adding a single contract document classifies the request as a single contract type request while adding more than one contract documents classifies it as multiple contract type requests.

5. **Optional:** Save the information in the request to submit later in Employee Center by selecting **Save as Draft**.

Note: If the contract type is deactivated when the request is saved as draft, the inactive contract type is not included in the list displayed in the **Document type** field. You must select an active contract type before submitting the request.

6. Select **Submit**.

Result

- A legal request for reviewing the attached third-party contracts and any supporting documents is created in the New state.
- The contract documents and supporting documents are available in the respective tabs, and the contract status is New.
- For a custom record producer, if no documents are attached, the legal request is created in the Draft state. You must upload the documents and resubmit the contract request. For more information, see Resubmit third-party contract request.

For more information on how to view and track the legal request, see View and track third-party contract review request as a legal user.

What to do next

As a member of the legal department contract support team, work on the request to review the contract and get it signed. For more information, see Work on a third-party contract review request

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Resubmit third-party contract request

As a legal user, resubmit contract request in draft state.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

About this task

For a custom record producer, if no documents are attached while submitting the legal request, the legal request will created be in Draft state. You need to upload document and resubmit the contract request.

Procedure

1. Open the third-party contract review request.

Method	Action
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select the **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted legal request from the list. **e.** On the Standard Ticket page, from the Actions menu, select **Edit Request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center** **b.** Select the **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted legal request from the list. **e.** On the Standard Ticket page, from the Actions menu, select **Edit Request**.

2. In the Documents section, attach documents.

Method	Actions
Choose a file	**a.** Select **Choose a file**. **b.** Select the files to attach and select **Open**.
Drag file	Drag files from your local computer into your browser window to attach them to the current record.
Copy and paste clipboard files	○ From your local computer, copy the files that you want to attach. ○ Click inside the Documents box and paste the files.

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The attached files are listed with File name, Document type, and Actions in the Documents section The list of documents attached can be seen in the activity stream of the request.

3. Classify the attached documents.

Classification	Actions
Contract document	**a.** In the **Document type** field, select the drop-down arrow. **b.** Select the type of contract relevant to the document. Only active contract types are displayed in the list. **Note:** At least one document should be classified as a contract document.
Supporting document	**a.** In the **Document type** field, select the drop-down arrow. **b.** Select **Supporting Documents** from the drop-down list.

4. Select **Resubmit**.

View and track third-party contract review request as a legal user

View the details of a third-party contract review request after it has been submitted and track the activities in the request.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

Procedure

1. Open a legal request.

Method	Actions
Employee Center	**a.** Navigate to **All** > **Employee Center** **b.** Select **My Requests** option on the header menu. **c.** Open your submitted third-party contract re view request.
Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Ser vice Portal** **b.** Select **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted third-party contract re view request.

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2. View details of the request.
   - View the contract document by accessing **Contract documents** tab.
   - View the supporting documents by accessing the **Supporting documents** tab.
   - Track the request's activities and post messages for the fulfiller working on it by accessing the **Activity** tab.
   - View the list of signatories and their details by accessing the **Signatories** tab.
   - View the details of the third-party contract review by accessing the **Request Details** tab.

     When legal fields are modified in a workspace, the updated value and previous values are displayed in the corresponding variables in the **Request Details** tab.
   - View the final contract documents by accessing the **Legal Contract** tab. When multiple contract documents are attached, a separate record is created for each contract type.

Modify a third-party review request

As a requester, modify a legal request to update the request details or replace the attached contract document with an updated version.

Before you begin

You can modify a request until it is in the Draft state.

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

Procedure

1. Open the third-party contract review request.

Method	Action
Using Legal Service Portal	**a.** Navigate to **All** > **Legal Request** > **Legal Service Portal** **b.** Select the **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted legal request from the list. **e.** On the Standard Ticket page, from the Actions menu, select **Edit Request**.
Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center** **b.** Select the **My Requests** option on the header menu. **c.** Select **View all requests**. **d.** Open your submitted legal request from the list. **e.** On the Standard Ticket page, from the Actions menu, select **Edit Request**.

2. Modify the request.

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Action	Steps
Modify the request details	Modify the fields of the third-party review request. For more information, see Third-party Contract Review form.
Add and classify documents	For more information, see Resubmit third-party contract request
Delete documents	In the Documents section, select the Delete icon ( ) next to the document you want to delete.

3. Select **Save** to update the record.

Work on a third-party contract review request

As a member of the legal contracts support team, review and revise a third-party contract document. You can email the revised document to stakeholders to verify the revisions and then send the ready document for signature from within the legal request.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure

1. Assign a legal request to yourself or to someone in your assignment group.
   For more information, see Assign a legal request
2. Start working on a legal request.
   a. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
   b. Click the list icon ( ).
   c. Select **Legal requests** option.
   d. Select **Assign to me**.
   e. Open the legal request from the list.
   f. Select **Start work**
   The state of the legal request updates to Work in progress.
3. In the **Lists** tab, navigate to **Legal Requests** or **Contract Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a contract request to work on.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a contract request to work on.

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4. **Optional:** If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field.

   Note: Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field.

   The collaborators are notified via email that they have been added as collaborators to a legal request.

5. **Optional:** Reclassify the contract or supporting documents submitted for review.
   For more information, see Reclassify contract documents in third-party contract review request as a legal fulfiller and Modify supporting documents in third-party contract review request as a legal fulfiller.

6. **Optional:** If you have opened contract request from the **Legal requests** listing, select **Contract request** tab.

7. Open an existing revision of a contract document.
   - For internal storage:In the **Contract documents** tab, select the name of the document to open the document revision record.
   - For external storage: In the **Contract documents** tab, click the link in the **URL** tab to view the document online.

8. Review the contract documents.

9. Revise the contract document if any changes are required and upload it by creating revision.

   a. Select **Create revision**.

   b. In the **Select contract type** field, select the contract type.

   c. In the **Create Revision from** field, select the storage type to attach the revision.

   - To select a file from your local system, select **Computer** and upload a file.

   - To select an attachment from the activity stream, select **Activity stream**.

     Files attached to inbound emails are listed in the **Document** field.

   - To select a file stored in the configured external storage system, select **External storage**.

     This option is displayed only if an external storage has been configured.

     (Optional) Add more information about the document in the **Notes** field.

     This information is added to the activity stream along with the attachment.

   d. Select **Create**.

   The document is added to the request. The revision number of the latest document is one higher than the previous document revision number. The document revision is listed in the **Contract Documents** tab.

10. If an approval is required from other stakeholders, send the document for ad hoc approval.
    For more information, see Initiate an ad hoc approval for a legal request or its attachment.

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11. Set up an email to stakeholders to have the completed contract document reviewed and the changes confirmed.

    a. Select **Compose Email**.

    b. In the Compose Email pop-up, select documents to be attached to the email.

    c. Select **Add** to attach the document to the email.
    An email editor is displayed.

    d. In the **New Email Draft** tab, add recipient email addresses in the **To**, **CC**, and **BCC** fields as appropriate.

    In the **To** field enter the email address of the recipient, The **CC** field will be set to requester's email address.

    e. Enter the subject of the email in the **Subject** field.
    The short description of the request is populated by default.

    f. In the **Attachments** field, select the **+Add File** link to add the documents and then select the source of the file.

    g. Either enter your own message in the email body or copy and paste the content from an email response template into the email body.

    Using response templates, you can insert predefined content into the email body. Select the response template icon ( ) and find an appropriate response template based on the subject of your email. Copy and paste the template's content into the email body.

    Note: Only response templates configured for the email channel are available to use. For more information, see Response templates configured for email channel.

    h. Either send the email immediately or indicate that it should be sent later.

    - To send the email immediately, select **Send email**.
    - To indicate that the email should be sent later, select **Save as draft**.

12. In the **Signatories** tab, add signatories to whom the contract will be sent for signature by selecting **Add**.

Option	Steps
Internal	**a.** In the **Internal Signer** field, enter the name of the signer. The fields **Authorized signatory name**, **Signatory**, and **Signatory email** are automatically populated. **b.** In the **Order** field, enter the order in which the email should be sent to the signer. The order value should be unique

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Option	Steps
External	**a.** In the **Authorized signatory name** field, enter the internal signer's name. **b.** In the **Signatory** field, enter the internal signer's title. **c.** In the **Signatory email** field, enter the internal signer's email address. **d.** In the **Order** field, enter the order in which the contract should be sent to signers for signature. The order value should be unique.

13. When all stakeholders have agreed on a contract document revision, select **Prepare for Signature** to prepare and send the document to the signatories for signature.

    a. In the Reorder the document pop-up, drag and place the documents to define the order. The reorder option is displayed only when more than one documents are attached in the contract request.

    b. Select **Prepare for Signature**.

    > **Note:** When you select **Prepare for Signature**, the document opens on the configured e-signature portal.

    The Contract status and State updates to Preparing for Signature.

14. Complete the document in the configured e-signature system and send it for signature.

    a. Preview the document to verify that the content is correct.
    The contract documents submitted in the third-party contract review request will be combined into a single document.

    b. Add the required fields including the Signature and Signature date field for all the signatories.

    c. Select **Send**.

    An e-signature envelope is created and sent to all signatories. If the system receives a success notification from the electronic signature provider, the Contract status updates from Preparing for Signature to Awaiting Signature.

15. **Optional:** If you need to cancel the signature request before all signers have completed signing the document, select **Cancel Signatures**.
    The Contract status updates to Signature cancelled.

What to do next

- Signatories can review and sign or decline to sign the contract.

  For more information, see Signature workflow for a request.

- Check the Contract status in the request.

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- If all signatories sign the contract document, the Contract status updates to Contract Signed. In the **Signatories** tab, the status of all signatories updates to Signed. You can access the legal contract repository record from the **Legal Contracts Repository** tab.
- If any signatory declines to sign the contract document, the Contract status updates to Signing declined. In the **Signatories** tab, the status of all signatories updates to Declined. If more changes are required in the contract document, update it and resend it to the signatories for their signature.
- After all the signatories have signed the document, an email is sent to the legal signatories with the finalized contract document attached.
- If the certificate of completion is enabled, a certificate will be issued with the timestamp details about each signatory's action during an electronic signature.

- If the contract is signed by all signatories, you can close the request by selecting **Close Complete**. For more information, see Close a legal request

Reclassify contract documents in third-party contract review request as a legal fulfiller

As a legal fulfiller, reclassify the documents submitted in a third-party contract review request. For example, you need to change the contract document type from Non-disclosure Agreement to Partnership Agreement.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

About this task

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Open the legal request for which you want to reclassify the documents.
4. Select the contract request from the **Contract Requests** tab.
5. In the **Contract Documents** tab, select **Reclassify**.
6. In the **Contract type** drop-down list, select the contract type that you want to reclassify.
7. In the **Reclassify to** drop-down list, select the contract type into which you want to reclassify. Only active contract types are displayed in the list.
8. **Optional:** Add more information about the document in the **Work notes** field.
9. Select **Reclassify** to update the classification.
10. Select **Save** to save the record.

Modify supporting documents in third-party contract review request as a legal fulfiller

As a legal fulfiller, add, remove, or reclassify supporting documents submitted in a third-party contract review request.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

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About this task

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ().
3. Open the request for which you want to reclassify the documents.
4. Select the contract request from the **Contract Requests** tab.
5. Navigate to **Supporting Documents** tab.
6. Modify the supporting documents.

Action	Steps
Add supporting documents	**a.** Select **Attach Document**. **b.** In the **Upload From** drop-down list, select a storage type and upload a new document. The available storage types are: ▪ **Computer** - Select **Attach File** and up load the revised document. ▪ **Activity stream** - In the **Document** field, select the document that is displayed based on an attachment in the activity stream. ▪ **External Storage** - In the **Document** field, select the document. This option is dis played only if external storage is config ured. **c.** (Optional) Add more information about the document in the **Work notes** field.
Reclassify supporting documents	Reclassify contract documents in third-party contract review request as a legal fulfiller
Remove the supporting document	**a.** Select the document you want to delete. **b.** Select **Remove**. **c.** On the Confirmation screen, select **Re move**.

7. Select **Save** to save the record.

Cancel the wet signature process from the Employee Center

Cancel a wet signature process for a Non-disclosure agreement legal requests from the Employee Center.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

About this task

You can cancel the signature process from the Employee Center under following conditions:

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- The legal request is of type Non-disclosure agreement.
- The signature type of the Non-disclosure agreement legal request is Wet signature.
- The state of the contract request should be Awaiting signature.

Procedure

1. Navigate to **All** > **Employee Center**
2. Select **My Requests** from the header.
3. Open the legal request for which you want to cancel the signature.
4. On the request page, from the Actions menu, select **Cancel signature**.
5. On the confirmation window, select **Cancel signature** to confirm the cancellation.

Result

The contract status updates to Signature cancelled, and a notification email is sent to all signatories.

Contract amendments

The contract amendment workflow enhances contract lifecycle management by enabling you to initiate, track, and finalize amendments to existing contracts with an audit trail.

Amendments can be made by adding, removing, or updating terms, without the need to replace the entire contract.

You can use the **Amendment request** intake form available in the Employee Center to submit an amendment request.

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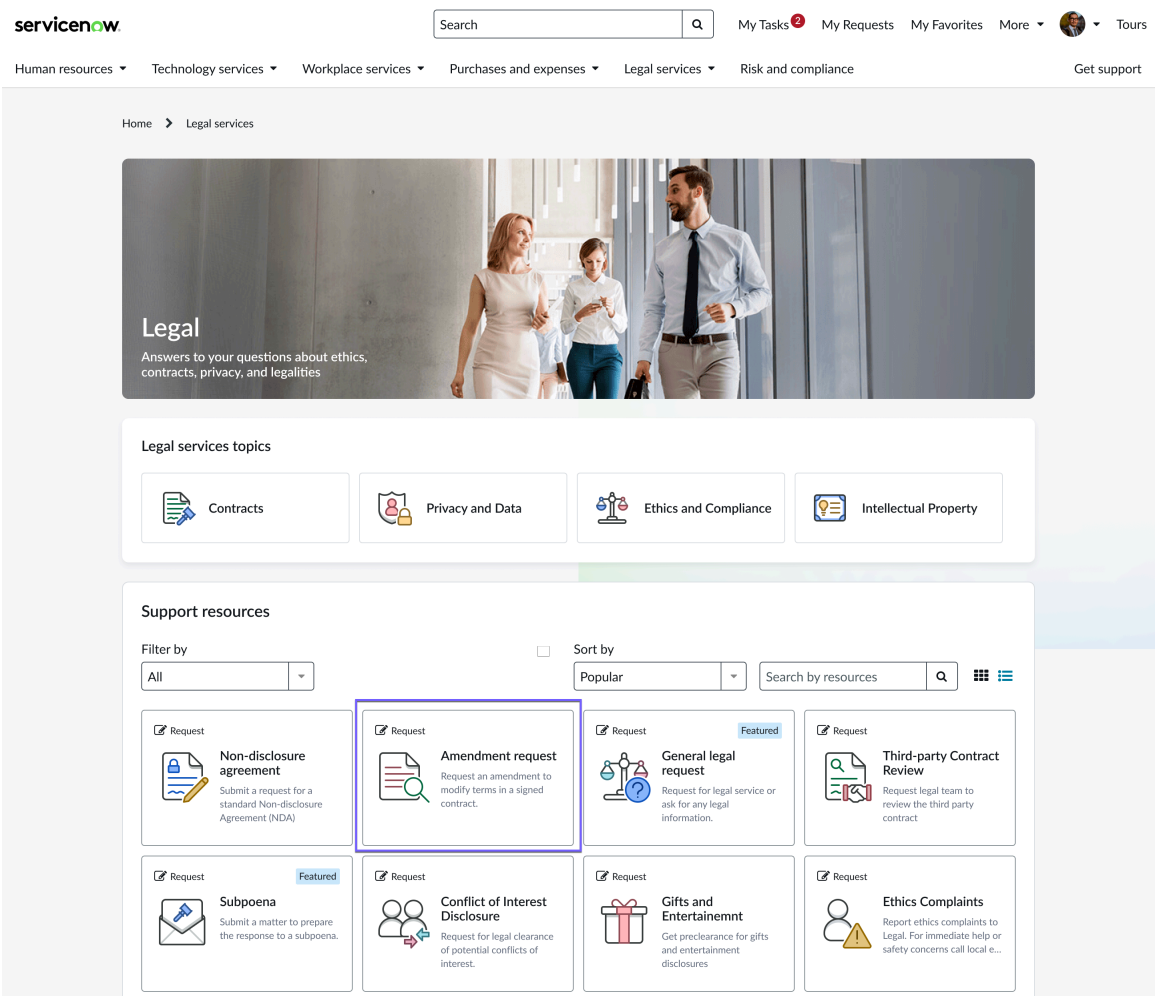

Distinguish contract and amendment request

The field, **Request type**, differentiates contract and amendment requests. For amendment request, the value is **Amendment** and for contract request its **New contract**.

The Request type field is displayed in the contract details secondary header, and list pages making it easy to differentiate between the two request types.

This field is also available in the following base system configurations (when demo data is installed) to indicate whether the configuration applies to a contract or an amendment request:

- Contract template rules
- Contract configurations

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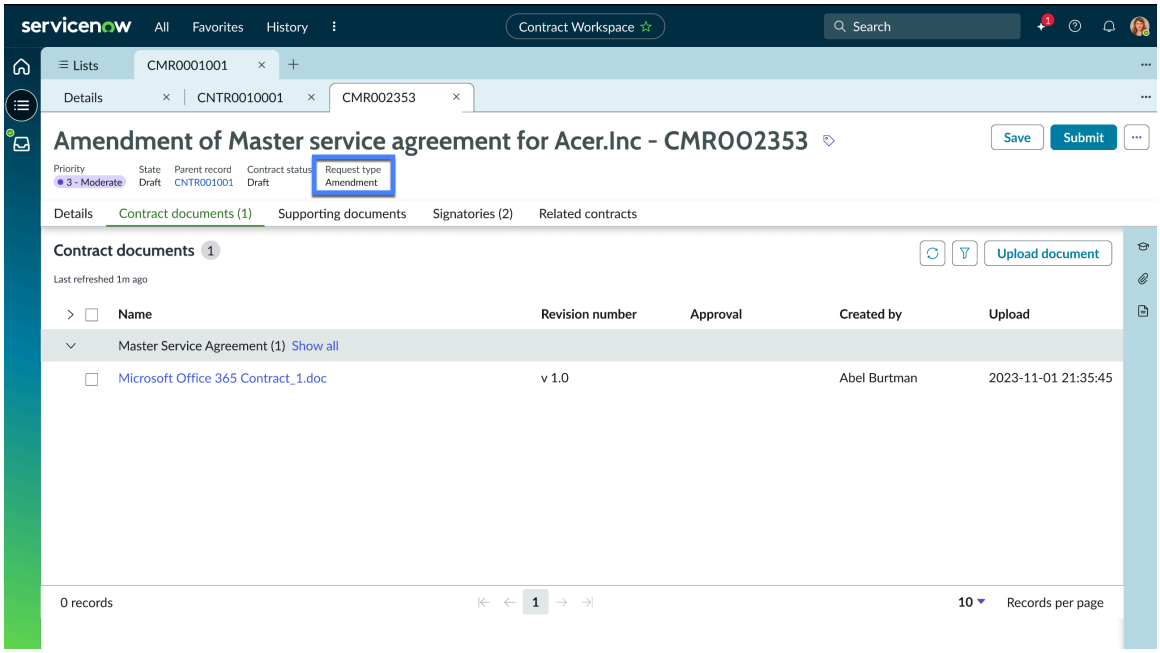
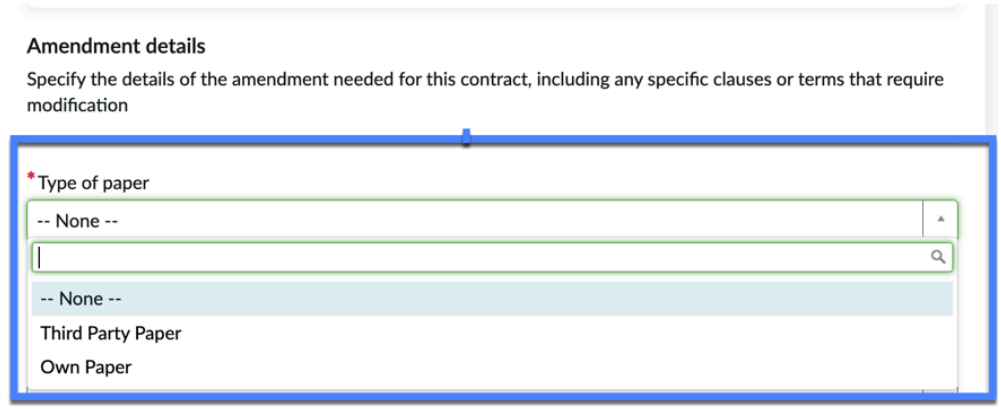


Types of paper for an amendment request

The amendment workflow supports both own-paper and third-party amendment requests.

Note: Third-party amendments are supported only for single contract types.

While submitting an amendment request, you can select the **Type of paper** from the intake form.



Amendment intake form and record producer

The intake form and record producer for an amendment are available in the base system, enabling you to submit an amendment requests.

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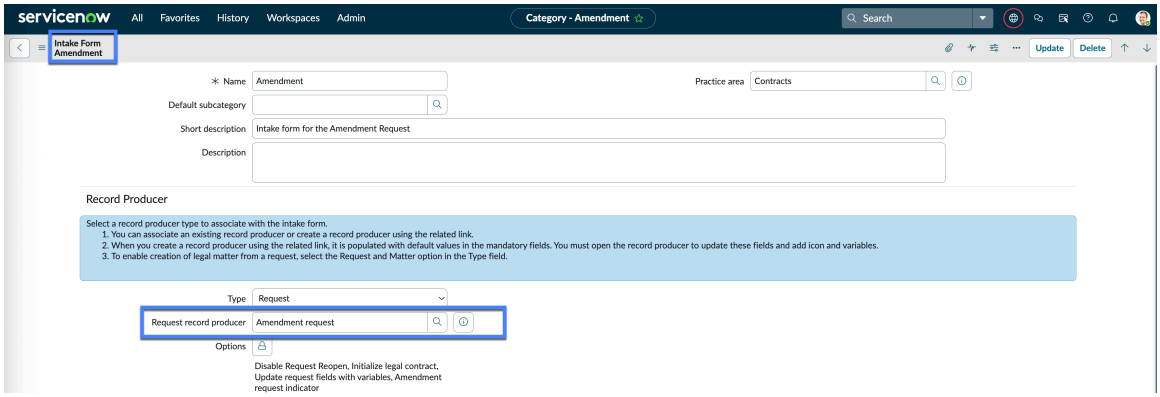


You can also create a customized record producer by copying a base system (OOB) record producer to reuse its existing configuration settings. For more information on how to create record producer, see Create a legal contract intake workflow.

While linking the record producer to an intake form, verify that the **Amendment request indicator** is selected in the **Options** field.

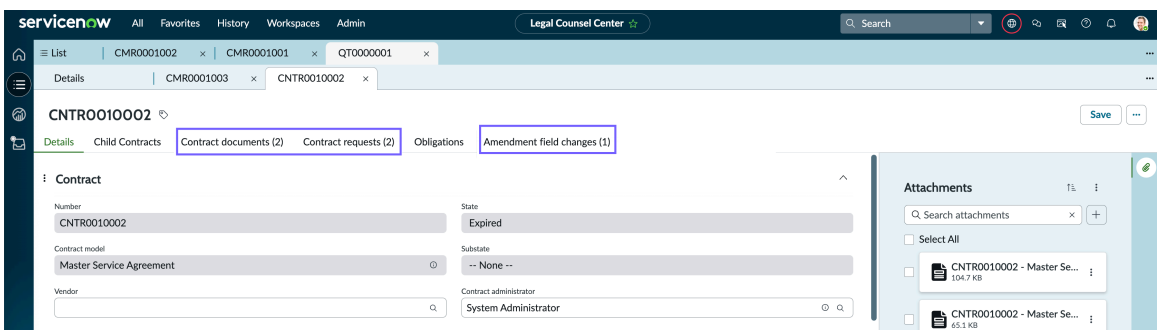
The following other configurations are available in the base system when demo data is installed:

- Contract template (Sample - NDA Amendment-SignBlocks) used to generate amendment document for own-paper based amendment request.
- Contract template rule (Sample - NDA Amendment-SignBlocks) to identify the contract template used for generating a contract document for an amendment request.
- Contract Configuration (Sample - NDA Amendment-SignBlocks) to define and map the fields that will be populated in the amendment document.

View contract amendment details

The following tabs are available within the contract repository record to provide amendment details:

- Contract Documents: Provides access to all documents related to the signed contracts, including those generated or updated as part of amendment processes.
- Contract Requests: Displays all contract and amendment requests associated with the contract.
- Amendment Field Changes: Shows a detailed log of all field changes made through amendments, enabling easy tracking of modifications over time.



Contract amendment workflow

The contract amendment workflow might progress as follows:

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1. The contract requester does the following:
   a. Initiates an amendment request from the Employee Center.
   b. Selects a contract for amendment or enters contract details manually.

      Note: When a contract is selected while submitting an amendment request, it's automatically linked as the parent contract for the amendment request.

   c. Enters amendment details and submits the request.
2. The contract fulfiller does the following:
   a. Assign the amendment contract request.
   b. Link a parent contract, if it's already not linked.
   c. Modify legal request.
   d. Review the details of the amendment requested.
   e. Update the contract details and contract document according to the amendment request.
   f. Upload revised contract document using **Create revision** option.
   g. Finalizes the contract amendment using the review, approval, and signature workflow.
3. After all signatories have approved the document, the signed amendment is attached to the contract repository record.
4. The contract repository record displays the amendment details in the Contract Documents, Contract Requests, and Amendment Field Changes tabs.
5. The signed amendment is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The signed contract and its amendment documents are stored in a centralized repository under the parent contract for easy access and manage all related documents from a single location. The field values that have been modified is updated in the amendment according to the contract configuration mapping.

Now Assist in Contract Management features for amendment documents

For amendment documents, Now Assist in Contract Management features of obligation extraction or metadata extraction aren't supported. However, Contract Analysis is supported when all the configurations are complete and valid, enabling users to review and analyze amendments effectively.

For more information, see Now Assist in Contract Management.

Submit amendment request

Submit an amendment request from the Employee Center.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

About this task

A sample workflow while submitting on an amendment request would be:

1. Initiate an amendment request.
2. Select a contract for amendment or enters contract details manually.

   Note: When a contract is selected while submitting a request, it's automatically linked as the parent contract for the amendment request.

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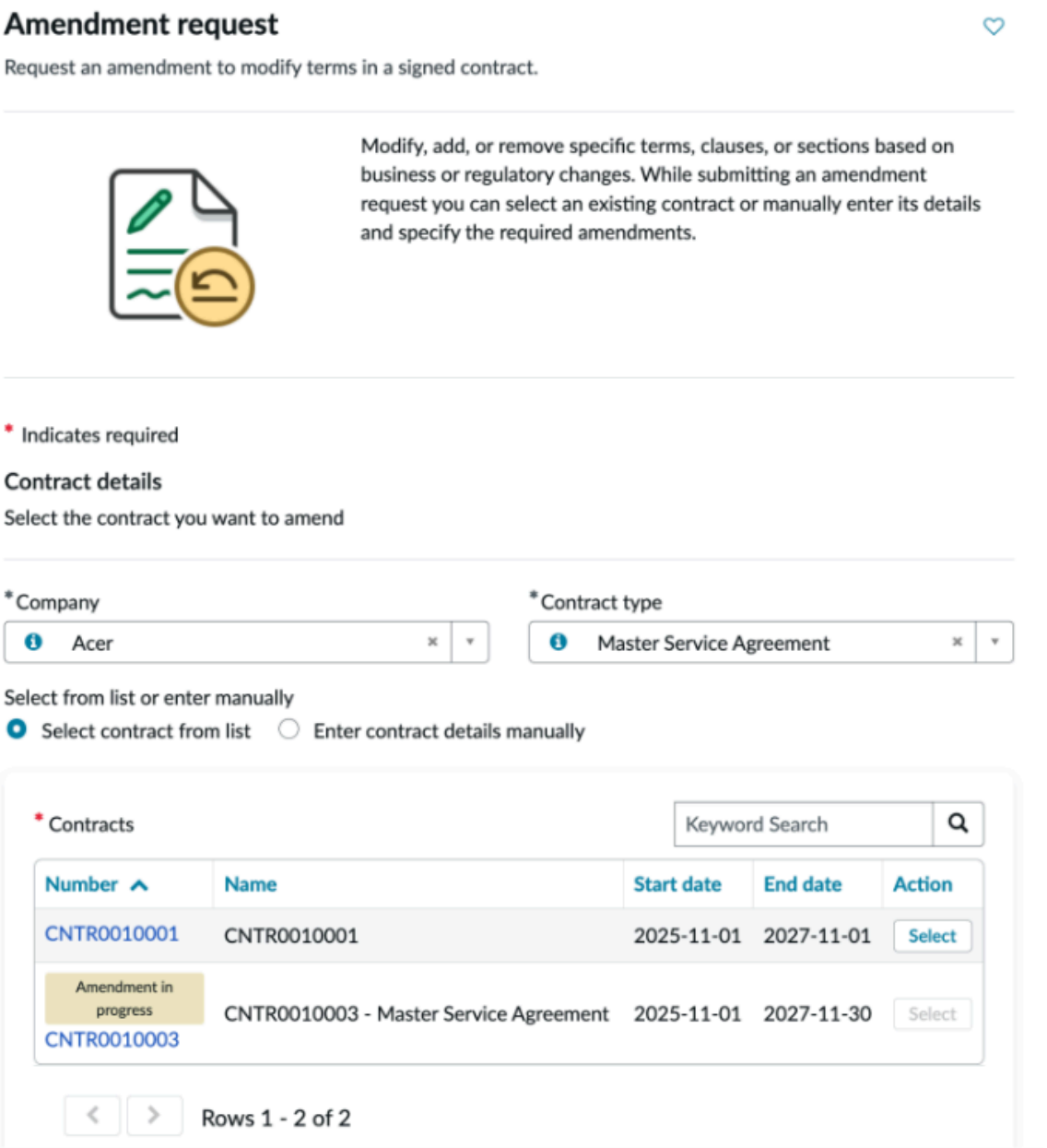
3. Select the paper type.
4. Enters amendment details.
5. Select the signature type.
6. Attach documents.
7. Submit the request.

Procedure

1. Navigate to **All** > **Employee Center**.
2. Select **Legal services** from the header.
3. Search for **Amendment request** and open the intake form.



4. Enter the contract details.

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Option	Steps
Select an existing contract	**a.** Select company in the **Company** drop-down. **b.** Select the contract type in the **Contract type** dropdown. **Note:** Only active contracts and contracts with no pending amendment requests are listed. **c.** Select the contract number to view details and the associated documents. Although some of the fields look editable, changes made cannot be saved to the contract record. **d.** Select **Select** to choose the contract. **Note:** ▪ You can't select contracts that have an active amendment request. ▪ If the required contract isn't listed, choose **Enter contract details manually** option and provide the contract and amendment details. ▪ A parent contract child hierarchy is established between the selected contract and the amendment request. You can't unlink the parent and the child contract.
Manually enter contract details	**a.** Select **Enter contract details manually**. **b.** Select **Upload**. **Note:** You can only upload one document of PDF type. **c.** Select the file to upload and select **Open**.

5. Select type of paper in the **Type of paper** field.
   - For own-paper based amendment request, select **Own paper**.
   - For third-party paper based amendment request, select **Third Party Paper**. The amendment is supported for third-party contracts with a single contract type.
6. Enter amendment details.
   a. In the **Effective date** field, select a date within the existing contract's start and end dates to indicate when the amendment takes effect.
   b. In the **Requested for**, select the user for whom you want to submit a legal request.
   c. In the **Description** field, enter the details of the changes required to the existing contract document and any other details.
7. Select Electronic or Wet signature, in the **Signature type** drop-down.
   For more information on the signature flow, see Signature workflow for a request
8. Attach contract documents.

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- For own paper based amendment requests: Adding documents isn't required. The attached documents are classified as supporting documents.
- For third-party paper based amendment requests: Adding documents is required. You must classify the attached document. The options available for classification are supporting documents and contract type selected in the contract details section.

Method	Actions
Choose the file	**a.** Select **Choose a file**. **b.** Select the files to attach and select **Open**.
Drag the file	Drag files from your local computer into your browser window to attach them to the current record.

9. Add external signatories.
   Adding an external signatory is required for own-paper based amendment request and optional for third-party based amendment request.
   - To add a signatory, select **Add** and provide the signatory's details.
   - To modify a signatory's information, select the Edit row icon (✎) on the signatory's row and update the details.
   - To remove a signatory, select the Remove row icon (✖) on the signatory's row.
10. **Optional:** Save the information in the request to submit later in Employee Center by selecting **Save as Draft**.

    Note: If the contract type is deactivated when the request is saved as draft, the inactive contract type isn't included in the list displayed in the **Contract type** and **Document type** fields. You must select an active contract type before submitting the request.
11. Select **Submit**.

Result

- An amendment request is submitted in the New state and a contract request is created for the contract fulfiller to work on it.
- For own paper based amendment request, Version 1.0 of the amendment document is generated and listed in the **Contract Document** tab.
- The contract document process involves:
  - Using the correct contract template based on contract template rules.
  - Replacing the metadata with data from the request.
  - Replacing the signatory information.
  - Placing the content of the clauses in the contract document according to the clause variation rules.
- Internal signatories based on the template are also populated in the generated document. For more information, see Define an internal signatory rule. View the signatories in the Signatories tab of the contract request.

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For more information on how to view and track a legal request, see View and track non-disclosure agreement requests as a legal user.

View and track amendment requests as a legal user

View the details of an amendment request after it has been submitted and track the activities in the request.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

Procedure

1. Navigate to **All** > **Employee Center**
2. Select **My Requests** option on the header menu.
3. Open your submitted amendment request.
4. View the details of the amendment request.

Contract request details

Information type	Tab
Legal contract	This tab is visible only after all signatories have signed the contract. It displays the contract selected for amendment when submitting a request. The tab does not appear if the contract details were entered manually. Select the document to download and view it.
Contract Documents	Contract Documents ○ If the request uses internal storage for attachments, download and then view the document by selecting it. ○ If the request uses external storage, access the document by selecting the link.
Supporting Documents	Supporting documents attached while submitting the amendment request.
Activity	Amendment request details, actions taken, comments added and progress of the request.
Signatories	Internal and external signatories added while submitting the amendment request and their progress.
Request details	Request Details

5. **Optional:** Track the activities in the request and post messages for the fulfiller working on it by accessing the **Activity** tab.

Work on amendment request

Review and work on an amendment request for an existing contract.

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Before you begin

The practice area lead or group manager should have assigned you the request. If not, you can open the request to assign it to yourself or someone in the group.

Role required: sn_lg_cnt.contract_fulfiller

About this task

A sample workflow while working on an amendment request would be:

1. Assign the amendment contract request.
2. Link a parent contract, if it's already not linked or you want to change the linked contract.
3. Modify legal request.
4. Review the details of the amendment requested.
5. Update the contract details and contract document according to the amendment request.
6. Upload revised contract document using **Create revision** option.
7. Finalizes the contract amendment using the review, approval, and signature workflow.

Identify the legal and contract requests created for amendment using the following indicators:

- In the legal request, the subject is in the *`Amendment request of <contract_type> for <company_name>`* format.
- In the contract request, the subject is in the *`<type of paper> - <contract type> - amendment request - <CMR-number>`* format and the **Request type** is set to Amendment

Procedure

1. Assign to yourself and start working on an amendment request.
   a. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
   b. Select the list icon ( ).
   c. In the **Legal Requests**, select **Unassigned**.
   d. In the list of unassigned requests, open a request by selecting the request number.
   e. Select **Assign to me**.
   f. Select **Start work**
   The state of the legal request updates to Work in progress.
2. Link parent contract (Example: CNTR0010077) when prompted with a message or you want to change the already linked parent contract.

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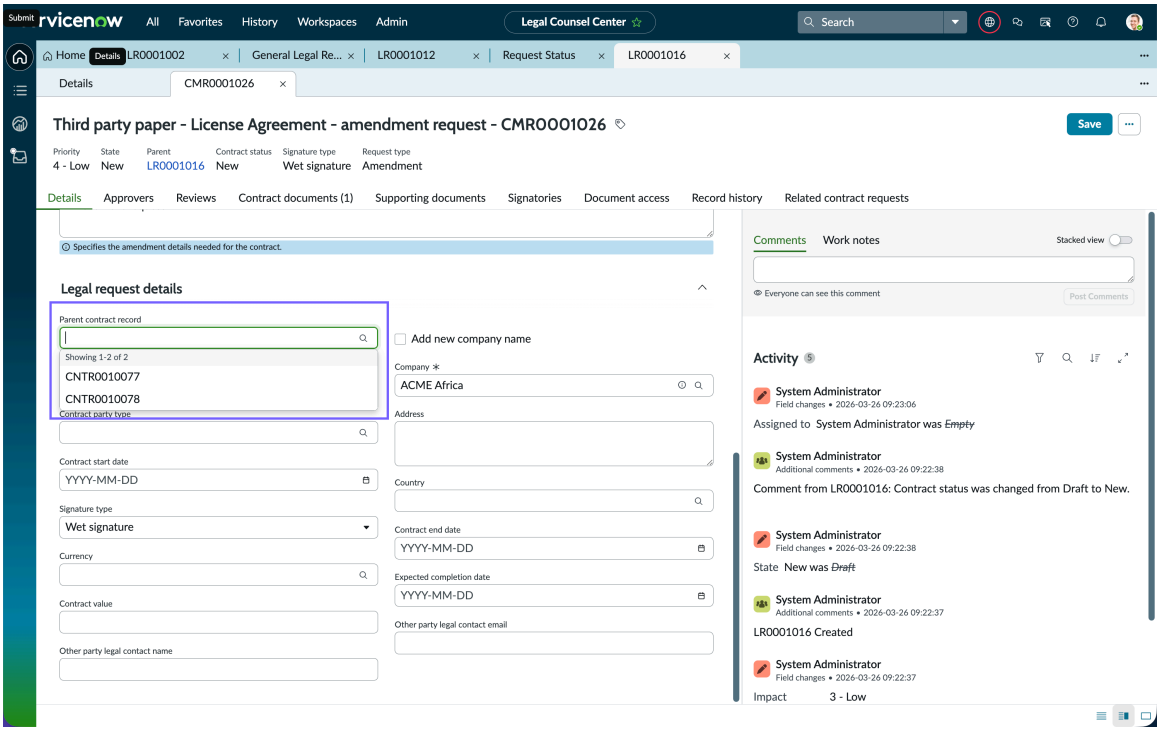

- If you didn't select a contract while submitting the amendment request, you're prompted to link a parent contract record.
- When a contract is linked, its corresponding contract request (Example: CMR0001026) will automatically be linked through a parent-child hierarchy. You can't manually unlink the contract request as it depends on the contract selection.

a. Navigate to the Legal request details section.

b. In the Parent contract record field, select the Search for Record icon ( ).
Only active contracts that don't have any ongoing amendment requests are listed.

c. Select the contract from the list.

3. **Optional:** Modify legal request.

Options	Steps
Add collaborators	If you need help from other fulfillers to work on the legal request, add them in the **Collaborators** field. **Note:** Users with the sn_lg_contracts.contracts_fulfiller role are listed in the **Collaborators** field. The collaborators are notified via email that they've been added as collaborators to a legal request.
Update the users in watch list and requested for	Update the **Watch list** and **Requested for**. Any changes done to the **Watch list** and **Requested for** are synced to the contract request.

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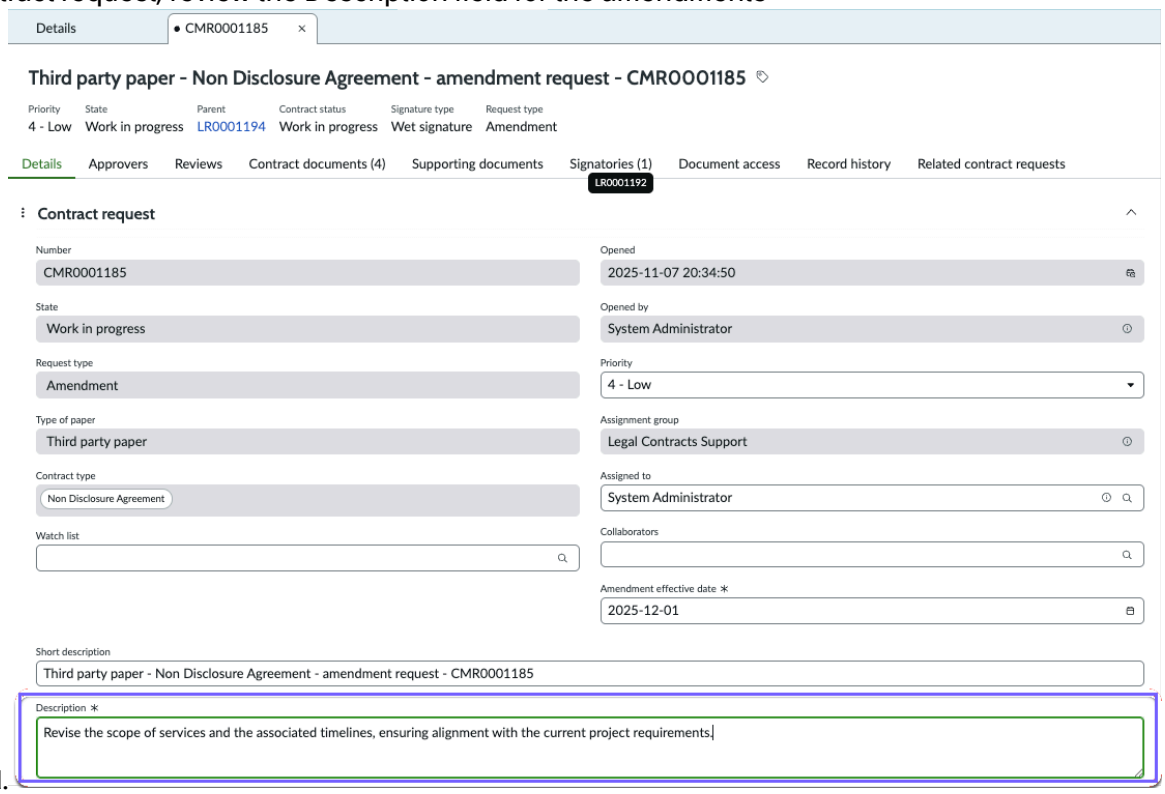
4. **Optional:** If you have opened a contract request from the **Legal requests** listing, select the **Contract Requests** tab and open the contract request.
5. In the contract request, review the Description field for the amendments requested.



6. Update the contract request.

   a. Change the values of fields that must be amended.
   For example, if there was a requirement to change the end date, change the date in the **Contract end date** field.

7. Download the contract document.

   a. Navigate to **Contract documents** tab.

   b. Select **Preview document**.

   c. Select the contract type.

   d. Select **Preview**.
   The document opens in a new tab.

   e. Select the Download icon (⬇)
   The document is downloaded into your system.

   f. Edit the document for the amendments requested.
   While authoring or negotiating a contract revision, add clauses from the clause library listed in the Microsoft Word add-in for ServiceNow Contracts.

8. Upload the revised contract document.

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a. In the **Contract documents** tab, select **Create Revision**.

b. In the Create revision dialog box, select the source of the updated contract and upload a new document revision.

c. **Optional:** Add work notes to provide any information on the attached document.

d. Select **Create**.
The attached document is added to the request. The revision number of the latest document is one higher than the previous document revision number. The document is listed in the **Contract document** tab.

9. **Optional:** Add or remove signatories to the contract request.

Options	Steps
Add signatory	Add signatories to the contract request by accessing the **Signatories** tab and selecting **Add**.
Remove signatory	Remove the signatories from the contract re quest by accessing the Signatories tab, select ing the signatory, and selecting **Remove**.

Note: You can add or remove signatories in own-paper based amendment legal requests only when the contract is generated from a template configured with signature blocks.

10. For any metadata or signatory changes, synchronize the document by selecting **Sync document** in the **Contracts documents** tab.
A new contract document revision is created with the update metadata and signatories. The changes made in the previous revision are retained.

11. Finalize the contract amendment using the review, approval, and signature workflows.

Options	Steps
Ad hoc approval	Initiate an ad hoc approval for a contract doc ument revision
Internal review	Request an internal review.
Email communication	Set up an email to stakeholders to request to have the completed contract document reviewed and the changes confirmed using **Compose Email** option.
Signature workflow	

12. Send the contract amendment document for signature.
For more information, see Signature workflow for a request

Result

- When all the signatories have signed the existing Contract Repository record associated with the request is updated with the changes from the amendment.
- The state of the amendment request updates to **Contract signed**.

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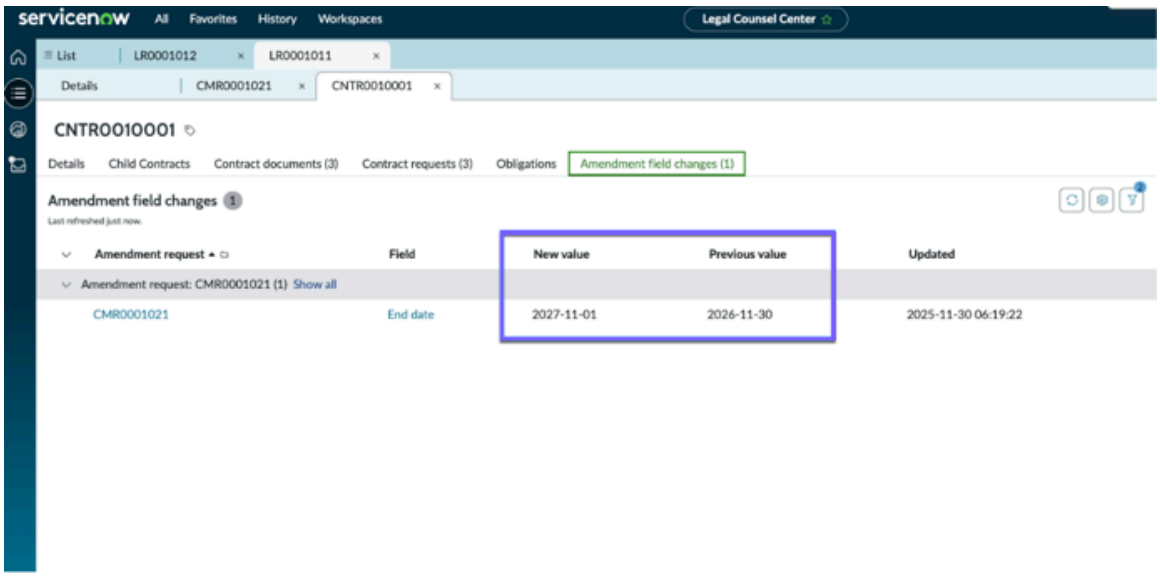
- In the Related contract request tab, you can view the parent contract child hierarchy is established between the parent contract and the amendment request. You can't unlink the parent and the child contract.
- The following tabs are available within the contract repository record to view the amendment details:
  - Details: View the changes done to the contract request for the amendment request. Example: If the end date is changed, it is reflected in the details section. Example: If the end date is changes, it will be reflected in the details section.
  - Contract Documents: Provides access to all signed documents related to the contract, including those generated or updated as part of amendment processes. The amendment contract documents have *Amend<version>* (Example: CNTR0010003 - Non Disclosure Agreement - Amend001) appended to the name. The <version> is automatically incremented for each signed amendment, but not for intermediate amendment versions.
  - Contract Requests: Displays all contract and amendment requests associated with the contract repository record.
  - Amendment Field Changes: Shows a detailed log of all field changes made through amendments. Example: Change in the contract end date is available in this tab. Example: Change in the contract end date is available in this tab.



  - Attachment pane: View the certificate of completion for the contract and amendment requests if electronic signature was selected.

View amendment details

View the amendment details in the contract repository record.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

About this task

For an amendment request, once the contract document is finalized and all signatures are complete, the existing Contract Repository record is updated with the changes from the amendment. In this record, you can view:

- Contract details
- Child Contracts

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- Contract Documents
- Contract requests
- Amendment field changes

You can view the certificate of completion from the Attachment pane.

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. View all contract repository records by navigating to **Legal contracts** > **All Contracts**.
4. Open the contract repository record.
5. To view the field changes, navigate to Details tab.
6. To view all the signed contract and the amendment requests associated with the contract repository record, navigate to **Contract requests tab**.
   The contract and amendment requests associated with the contract request is displayed.
7. To view all the revisions of the contract and amendment documents, navigate to **Contract documents**.
   - The contract and amendment documents associated with the contract request is displayed.
   - The amendment contract documents have *Amend<version>* appended to the name. The <version> is automatically incremented for each signed amendment, but not for intermediate amendment versions.
   - Use **Preview document** option to view the document.
8. To view field changes due to amendment, navigate to **Amendment field changes**.
   Field changes for each of the amendment is displayed along with new and old values.
9. To view certificate of completion for the contract and amendment request, navigate to **Attachments** pane.
   The certification of completion is available for electronic signature workflow only. For more information, see Activate a system property to generate a certificate of completion

Linking parent-child contracts

Link a parent contract to a child contract to establish hierarchical relationships between contract requests and inherit fields from the parent contract request.

You can associate a contract request with a parent contract from the Related Contract Request tab. When linked, the **Parent contract** field in the contract request Details tab is automatically populated with the parent contract request number. Depending on configuration, child contracts can inherit fields from the parent contract. Additionally, the associated contract repository records for the parent and child contract requests are automatically linked.

To link a contract as a parent, the following conditions must be met:

- The user must be assigned to the contract request, be a group manager, or a collaborator.
- The contract request must be in one of the following states: Draft, Work in progress, Awaiting review, or Contract signed.

  Note: If the contract request is in Contract signed state, the parent contract request must be in Contract signed or Closed complete state.

- The parent contract must not be in a Canceled state.

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- Only one parent contract can be selected while linking.
- The parent contract must be a single contract type using own paper or third-party paper.

Related topics

Link parent contract requests

Link and inherit parent contract fields

Remove a linked contract

Configure field mapping for parent-child contract linking

Internal review overview

Get your content reviewed by internal teams who have the expertise you need.

A workflow for getting content reviewed by internal teams might progress as follows:

1. For non-disclosure agreements, legal user submits a change request to the fulfiller for the content that needs internal review.

   Note: For third-party contract review requests, the contract user cannot create a change request. Instead, the contract fulfiller creates a task for internal review.

2. The contract fulfiller submits a review task when contract request is in Work in progress or Awaiting review State.
3. The contract reviewer or the manager assigns the review task.
4. The assigned contract reviewer starts working on the contract document.
5. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.
6. If a request for more information was submitted, the contract fulfiller shares the information.
7. The contract reviewer reviews the document, accept, reject, or proposes edits, and adds comments.
8. The contract reviewer completes the review and shares the updated contract document if available.
9. The contract fulfiller receives updated document and makes the necessary changes based on the feedback.
   - For internal storage - If any changes are required, a new document version is created after finalizing the document.
   - For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.

The contract request remains in the Awaiting review State until a review task is active.

Request an internal review

Initiate a review task for review of the contract document by subject matter experts.

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Before you begin

- For non-disclosure agreements, you may want review and feedback from the internal subject matter experts. If needed, the contract requester can submit a change request to the contract fulfiller. The contract fulfiller then submits a review task with the change request details. For more information, see Review a contract document in Employee Center.
- For third-party contract review requests, the contract user cannot create a change request. Instead, the contract fulfiller creates a task for internal review.

Role required: sn_cm_core.contract_fulfiller

About this task

- You can raise a review task when the contract request State is Work in progress or Awaiting review.
- You can create parallel review tasks for the same contract document for different reviewer groups. You can't create a review task for the same document with the same reviewer group if another active task already exists.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. Navigate to **Legal Requests** > **All**.
4. Open a legal request.
5. Navigate to **Contract Requests** tab and open the request.
6. Select the Reviews tab.
7. Select **New task**.
8. On the Create New Review Task form, fill in the details.

Create task for requesting internal review

Field	Value
Contract type	Contract for which you want to submit an internal review request. **Note:** The field is auto-populated when there is only one contract type. The latest revision of contract document is sent for review
Due date	Date to complete the task.
Priority	Level of priority to address the review request.
Assignment group	User group with contract reviewer role to which the task is assigned.
Assigned to	User to whom the task is assigned. If an assignment group is selected, the list shows members of the selected group.
Instructions	Description to specify the content to be reviewed.

9. Select **Create**.

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Result

A review task is created, listed in the Reviews tab and the change request details are added to the Activity stream. The Contract status updates to Awaiting review. If the new task doesn't appear in the list, click the refresh list button () to view it.

Work on internal review task

As a contract reviewer, review and provide feedback on contract documents

Before you begin

Role required: sn_cm_core.contract_reviewer

Procedure

1. Open the review task.

Method	Steps
My Work listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon (). **c.** Select **My Work** > **Requested Tasks** **d.** Open the review task from the list
Delegated to me listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon (). **c.** Select **Delegated to me** > **Contract Review Tasks** **d.** Open the review task from the list
Contract Review Tasks listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon (). **c.** Under **Contract Review tasks**, select **All** or **My tasks** **d.** Open the review task from the list
Contract Request Reviews tab	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon (). **c.** Select **Contract Requests** > **Assigned to me** **d.** Open the contract request from the list **e.** Select **Reviews** tab. **f.** Open the review task from the list.

2. If the review task is not already assigned, select **Assign to me**.
3. Select **Start work**.
4. Open the contract document.

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- Internal storage: Download the document.
- External storage: Select the document link to open it.

5. If you need additional context to review the document, request more information.

   a. Select the More Actions icon ( ).

   b. Select **Request information**.

   c. In the Comments field, enter the details about the information needed.

   d. Select **Submit**.
   The contract request Status and the review task State changes to Awaiting information and you can proceed with review after receiving information.

6. Share the review feedback
   The reviewer can make edits to the document, suggest changes through comments, and approve or reject any redlines.

Type of storage	Steps
Internal storage	**a.** Select **Complete review**. **b.** If you have a modified contract document to share, select **Yes**. **Note:** If you do not have modified contract document to share, select **No** and enter work notes in the Com ments field **c.** Select **Attach file** link and select a file **d.** In the Comments field, enter work notes. **e.** Select **Submit**.
External storage	**a.** Select **Complete review**. **b.** In the Comments field, enter work notes. **Note:** The attach file option is not available as the contract document is directly edited in the external storage. **c.** Select **Submit**.

   The review task will be closed, work notes are added to the Activity stream, and the State changes to Closed Complete.

Share requested information for internal review

As a contract fulfiller, share information requested by the reviewer to proceed with the contract document review.

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Before you begin
Role required: sn_cm_core.contract_fulfiller

About this task
The work notes added when requesting information are available in the Activity stream. Review the information needed and gather the information to be sent to the reviewer.

Procedure
1. Open the review task.

Method	Steps
My Work listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Select **My Work** > **Requested Tasks** **d.** Open the review task from the list
Delegated to me listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Select **Delegated to me** > **Contract Review Tasks** **d.** Open the review task from the list
Contract Review Tasks listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Under **Contract Review tasks**, select **All** or **My tasks** **d.** Open the review task from the list
Contract Request Reviews tab	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Select **Contract Requests** > **Assigned to me** **d.** Open the contract request from the list **e.** Select **Reviews** tab. **f.** Open the review task from the list.

2. Select **Send information**.
3. If you have document to be shared, select **Attach file**.
4. Select the file to be shared.
5. In the Comments field, enter work notes.
6. Select **Send**.

Result
The information is shared with reviewer and the review task State changes to Work in progress.

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Cancel a review task

As a contract fulfiller, cancel a review task irrespective of its state.

Before you begin

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Open the review task.

Method	Steps
My Work listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Select **My Work** > **Requested Tasks** **d.** Open the review task from the list
Delegated to me listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Select **Delegated to me** > **Contract Review Tasks** **d.** Open the review task from the list
Contract Review Tasks listing	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Under **Contract Review tasks**, select **All** or **My tasks** **d.** Open the review task from the list
Contract Request Reviews tab	**a.** Navigate to **All** > **Legal Counsel Center**. **b.** Click the list icon ( ). **c.** Select **Contract Requests** > **Assigned to me** **d.** Open the contract request from the list **e.** Select **Reviews** tab. **f.** Open the review task from the list.

2. Select **Cancel review**.
If you have selected **Cancel review** from the Reviews tab, select the review task to be canceled in the pop-up window.

3. In the Comments field, enter information for canceling the request

4. Select **Yes, cancel**.

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Result

- The review task is canceled and the cancellation comments appear in the Additional Comments section of the contract request.
- When all the review tasks are cancelled or closed, the contract request State updates to Work in progress.

Cancel a legal request

Cancel a legal contract request if it is no longer necessary.

Before you begin

Important: Cancelling a legal contract request after it has been sent for signature stops the process in its current state.

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user, sn_lg_cnt.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Service Portal**.
2. Open your submitted legal request from the **My Requests** option on the header menu.
3. On the Standard Ticket page, from the Actions menu, select **Cancel Request**.
4. In the dialog box, enter comments to explain why the request was canceled.
5. Select **Confirm Cancellation**.

Result

- The request is canceled and the associated active flows are terminated. The cancellation comments appear in the **Activity** tab of the request.
- The Contract status changes to Contract cancelled.
- The document signature sent to signatories is canceled to block further signing. The signatories get an email notification that the legal request has been canceled.

View and download a signed contract document

View and download a signed contract document.

When all signatories have signed a contract document, it's considered as the final contract document and is stored in the Legal Contract [sn_lg_cnt_repository] table.

Access to a contract document is based on the following user roles and conditions:

- Group manager, Assigned to user and collaborator have edit access to the contract repository.
- Contract fulfiller belonging to the same assignment group has view access to the contract repository.
- Contract fulfiller not in assignment group do not have access to the to the contract repository.
- A Contracts Fulfiller can view and update contract repository record
- Only a Contracts Administrator can delete contract repository record.
- Requesters can view only the contract documents for which they submitted the legal request.
- Users can view only contract documents for which they have been added to the watch list of the corresponding legal requests.

When multiple contract documents are attached, a separate contract repository record is created for each contract type.

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View and download a signed contract document as a legal fulfiller

View and download a signed contract document as a legal fulfiller.

Before you begin

Role required: sn_lg_contracts.contracts_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the list icon ( ).
3. In the Lists tab, navigate to **Legal Contracts** > **All contracts**.
4. From the list, open a contract repository record.
5. Select the **Contract Documents** tab.
6. Download the contract document.
   - If an external storage integration is active and published, select the link in the **URL** tab to open the external storage location to download the contract document.
   - If no external storage integration is available, select the document in the **Contract Documents** tab to view the contract revision details. Select the Actions icon ( ) and select **Download** to download the document. You can click on the name of the document view option to it.

View and download a signed contract document as a legal user

View and download a signed contract document as a legal user.

Before you begin

Role required: sn_lg_ops.legal_user and sn_cm_core.contract_user

Procedure

Open the legal request either from the platform view or using Service Portal.

Method	Actions
Using platform view	**a.** Navigate to **All** > **Legal Contracts** > **All Con tracts**. **b.** From the list, open a contract repository record. **c.** Navigate to the Contract Documents related list. **d.** Select the document name to view the de tails. **e.** Navigate to the Contract Document Revi sions related list. **f.** View and download the contract document. ○ If an external integration is active and published, select the link in the **URL** tab to open the external storage location to download the contract document.

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Method	Actions
	○ If an external storage integration is not available, select the document name to view the revision. From the **Manage At tachments** field, select the document to download it. You can also select the **view** option to view the document.
Using Service Portal	**a.** Navigate to **All** > **Legal Service Portal**. **b.** Select the **My Requests** option on the head er menu. **c.** Open the request you have submitted. **d.** In the **Legal Contracts** tab, select the con tract repository number to view the docu ment. ○ For external storage: Contract document opens in new browser tab. ○ For internal storage: Contract Document is downloaded.

View contract requests

When a legal request is submitted a contract request associated with it is initiated.

Before you begin
Role required: sn_lg_contracts.contracts_fulfiller

About this task
You can access contract request through the legal request or directly from the Legal Counsel Center.

Procedure
1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the list icon ( ).
3. In the Lists tab, navigate to **Contract Requests**.
   - Select **Assigned to me** to see the contract requests assigned to you.
   - Select **Collaborations** to see the contract requests where you are a collaborator.
   - Select **All** to see all the contract requests.

Manage Contract Management Pro for Legal Service Delivery

As administrator work on managing the word document templates and legal contracts.

Refer to the following topics on how to manage word document templates and legal contracts.

Manage clauses, tables, and contract templates

Create a contract type for defining different types of legal contract requests and associate it to a contract model.

Manage contract records

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Define a user as an internal signer so that the signer can be added to a contract template to automatically add to the contract document for a request.

View a contract repository record

Create document template categories to easily identify similar documents and find the correct document template more easily.

Modify a contract record

Enable users to view the details of email sent in the activity stream.

View a contract repository record

View the history of a legal contract to track changes, review the audit trail, and update fields. Easily see the date a contract was modified and who modified it.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. View all contracts by navigating to **Legal Contracts** > **All Contracts**.
4. **Optional:** View expired contracts or contracts that will expire soon.
   - To view contracts that will expire within 30 days, select **Expiring contracts**.
   - To view expired contracts, select **Expired contracts**.
5. **Optional:** View a previous version of the contract.
   a. Select the contract from the list.
   b. In the **Contract History** related list, select a date in the **Contract Starts** column to view the earlier version.

Modify a contract record

After a contract record is created, you can change the end date, parent contract, and contract model.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

About this task

If changes are made to a contract end date or its terms and conditions, a copy of the contract is automatically saved and placed in contract history.

Procedure

1. Navigate to **All** > **Legal Counsel Center**.
2. Select the List icon ( ).
3. View all contracts by navigating to **Legal Contracts** > **All Contracts**.
4. Select a contract.
5. **Optional:** Modify the contract end date.

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a. In the **End date** field, select the Show End date calendar icon ( ).

b. In the calendar pop-up, select a date.

c. Select **OK**.

6. **Optional:** Modify the parent contract.

a. In the **Parent contract** field, select the Search for Record icon ( ).

b. In the Parent contract pop-up list, select a contract record to assign as the parent contract.

7. **Optional:** Change the contract model.

a. In the **Contract model** field, select the Search for Record icon ( ).

b. In the Contract model pop-up list, select the model.

8. Select **Save**.

Manage clauses and contract templates

As administrator manage clauses, clause variations, and contract templates.

Edit a contract clause variation

Edit a clause variation to modify the content that will be used in a contract template.

Edit contract templates by manually adding content controls

Edit a contract template to reflect any modifications that must be included in the template to generate a standard contract when an employee submits a contract request.

Edit a contract template using Microsoft Word add-in for ServiceNow Contracts

Edit the metadata, signatories, or clauses in a contract template that must be included in the contract template to generate a standard contract when an employee submits a contract request using the Microsoft Word add-in for ServiceNow Contracts.

Create a contract template from an existing template

Create a new contract template from an existing template if you need only a small variation in the content of an existing template.

Generate and preview a contract document from a template

View the final form of a contract document with the content controls replaced with the values of the variables or return values of scripts.

Delete a contract template

Delete contract template when you no longer need it.

Contract Management Pro for Legal Service Delivery reference

Reference topics provide additional information about Contract Management Pro for Legal Service Delivery.

Components installed with Contract Management Pro for Legal Service Delivery

Several types of components are installed with activation of the Contract Management Pro for Legal Service Delivery application which includes the components for Contracts Core and Word Document Templates, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application .

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Roles

Note: Some roles in the **Contains roles** column are available with installation of the respective Legal Service Delivery application. For example, roles with an sn_lg_matter prefix are added when you install the Legal Matter Management application.

Roles installed with Contract Management Pro for Legal Service Delivery

Role title [name]	Description	Contains roles
Contract Management Pro for Legal Service Delivery configurator sn_lg_cnt.contract_config	Provides access to configure data such as internal signatories and template rules. It does not provide access to data related to legal contract requests submitted.	• connection_admin • sn_lg_ops.legal_user • catalog_editor • sn_cm_core.contract_config
Contract Management Pro for Legal Service Delivery administrator [sn_lg_cnt.contract_admin]	Provides the administrative permissions for the Contract Management Pro for Legal Service Delivery app and full access to the underlying data.	• sn_lg_cnt.contract_config • sn_lg_cnt.contract_fulfiller
Contract Management Pro for Legal Service Delivery contract owner [sn_lg_cnt.contract_owner]	Manages lifecycle of legal contracts	sn_cm_core.contract_user
Contract Management Pro for Legal Service Delivery fulfiller [sn_lg_cnt.contract_fulfiller]	Provides fulfiller access for working on contract requests.	• sn_lg_ops.legal_user • sn_cm_core.contract_fulfiller • contract_manager
Legal User [sn_lg_ops.legal_user]	Provides access to submit legal requests and track their progress. Can work on assigned tasks related to matters.	sn_interview_temp.reader
Contract user [sn_cm_core.contract_user]	This role is required to initiate and track contract execution.	None
Contract administrator [sn_cm_core.contract_admin]	Provides administrative access to Contracts Core and underlying data.	• sn_cm_core.contract_fulfiller • sn_cm_core.contract_config • usage_admin
Contract configurator [sn_cm_core.contract_config]	Provides access to configure data for contract templates and contract configurations. It doesn't provide access to the transactional data of Contracts Core.	• user_criteria_admin • sn_cm_core.contract_fulfiller • view_changer

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Roles installed with Contract Management Pro for Legal Service Delivery (continued)

Role title [name]	Description	Contains roles
		• sn_doc.writer • contract_manager
Contract fulfiller [sn_cm_core.contract_fulfiller]	This role is required to initiate actions while fulfilling an assigned contract execution. Example: Create revisions, Add Signers, Cancel Signer.	sn_cm_core.contract_user

Tables

Note: In addition to the following tables, tables specific to practice areas are installed with Legal Request Management. For more information, see Practice area tables for legal requests.

Tables installed with Contract Management Pro for Legal Service Delivery

Table	Description
Legal Contracts Repository [sn_lg_cnt_repository]	Stores the details of the contract repository.
Clause [sn_cm_core_clause]	Stores the details of clause fields.
Imported Clause [sn_cm_core_imported_clause]	Stores data related to imported clauses
Clause mapping [sn_cm_core_m2m_clause_word_template]	Stores the details of clause mappings.
Clause Variation [sn_cm_core_clause_variation]	Stores the details of clause variations.
Clause Variation Field (sn_cm_core_clause_variation_field)	Stores the details of clause variation fields.
Contract Type [sn_cm_core_contract_type]	Stores the details of contract types.
Contract Document [sn_cm_core_document]	Stores the details of contract documents.
Contract Document Revision	Stores the details of contract revision.

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Tables installed with Contract Management Pro for Legal Service Delivery (continued)

Table	Description
[sn_cm_core_document_revision]	
Contract Type Association [sn_cm_core_m2m_contract_type_template]	Stores the details of contract type associations.
Contract Configuration [sn_cm_core_contract_configuration]	Stores details of mapped data that will be added to the contract document and the contract repository where the contracts will be stored.
Contract execution [sn_cm_core_contract_execution]	Stores the details of contract execution.
Contract Repository Mapping [sn_cm_core_contract_repository_mapping]	Stores the data related to mapping between contract request fields and contract repository fields.
Signer [sn_cm_core_signer]	Store data related to the details of signers such as their name, title, email, and signer type.
Signatory [sn_cm_core_signer_task]	Stores details and the status of the task assigned to the signers.
Internal Signatories Mapping [sn_cm_core_signer_mapping]	Stores details of internal signatories.
Contract Type - Contract Model Mapping [sn_cm_core_contract_type_m2m_contract_model]	Stores details of contract type to contract model mapping.
Contract Document References [sn_cm_core_document_reference]	Stores details of Document References.
Contract Template Rule [sn_cm_core_contract_template_rule]	Stores details of contract template rules.
Supporting File [sn_cm_core_supporting_file]	Store details of supporting files attached to the third-party contract review request.

Third-party Contract Review form

The Third-party Contract Review form provides information for a legal request to the legal department to use when reviewing a third-party contract.

For more information, see Submit a legal request for a third-party contract review.

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Third-party Contract Review form

Field	Description
Requested For	The user for whom the request is being submitted. This field is visible only when you're a legal fulfiller with the sn_lg_cnt.contract_fulfiller role and are submitting a request from the Legal Counsel Center.
Contract party type	Type of the third-party entity with whom the contract has to be signed.
Purpose of the contract	Subject and purpose of the contract.
Company	Legal name of the third party with whom the contract has to be signed.
Address	Mailing address of the third party.
Country	Country of the third party location.
Contract start date	Start date of the agreement period.
Contract end date	End date of the agreement period.
Expected completion date	The date by which the contract review has to be completed.
Currency	Contract currency.
Contract value	Cost value of the contract.
Signature type	Type of signature. • Electronic signature: The signatory electronically signs the contract. • Wet signature: The signatory manually signs the physical version of the contract. The default signature type is Electronic Signature.
Other party legal point of contact name	Name of the person from the third party who is the point of contact.
Other party legal point of contact email	Email address of the point of contact.
Documents	Contract and supporting documents to be reviewed by the legal department.

Predictive intelligence for Legal Service Delivery

The Predictive Intelligence for Legal Service Delivery uses machine-learning algorithms for the predicting Subcategory and Assignment group for legal requests.

Important: Starting with the Australia release, Predictive intelligence for Legal Service Delivery is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. There is no replacement for this plugin.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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Get started

Explore  Learn about Predictive intelligence for Legal Service Delivery	Configure  Install and configure Predictive intelligence for Legal Service Delivery
Use  Use Predictive intelligence for Legal Service Delivery	Reference  Get details about components such as roles, tables, plugins, and store applications that are installed.

Troubleshoot and get help

- Ask questions and explore other resources for Predictive intelligence for Legal Service in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore Predictive Intelligence for Legal Service Delivery

With Predictive Intelligence, you can train a model to predict a target value based on one or more input values. The Predictive Intelligence for Legal Service Delivery includes machine learning algorithms that predict the subcategory and assignment group for General Legal Requests and Ethics Complaints. You can create your own machine learning solution to meet your needs.

Predictive Intelligence for Legal Service Delivery overview

The Predictive Intelligence for Legal Service Delivery solution helps you reduce time spent on identifying and assigning General Legal Requests and Ethics Complaints by predicting the Subcategory and Assignment group based on short description, description and subcategory. Predictions with high confidence are automatically populated in the fields, while predictions with low and medium confidence are displayed as suggestions. The legal fulfiller can review the suggestions and fill in the fields as needed. You can customize the threshold for low, medium and high confidence scores.

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Predictive Intelligence for Legal Service Delivery users

Users

User	Description
Legal fulfiller	Reviews the predictions and updates the fields.

Predictive Intelligence for Legal Service Delivery workflow

1. The predictive intelligence administrator for Legal Service Delivery for Legal Service Delivery defines a solution definition that will be used to train a classification solution.
2. The predictive intelligence administrator for Legal Service Delivery for Legal Service Delivery defines a use case.
3. The predictive intelligence administrator for Legal Service Delivery for Legal Service Delivery defines a business rule which defines under what conditions the predictions will triggered.
4. The legal user submits a legal request.
5. The predictive intelligence solution is triggered.
6. The legal fulfiller opens legal request.
7. The predictions and suggestions for category and assignment fields are displayed.
8. For high confidence predictions, the fields are auto-populated. For medium and low confidence predictions, the predictions are only displayed.
9. The legal fulfiller reviews the suggestions and fills in the fields as needed.

Predictive Intelligence for Legal Service Delivery benefits

benefits

Benefit	Feature	Users
Improve productivity and efficiency of legal fulfillers as well as the legal department by predicting Subcategory and Assignment group, thereby reducing time spent in identifying and assigning legal requests.	Predictive intelligence for Legal Service Delivery	Legal fulfiller

What to explore next

To learn more about configuring and using Predictive Intelligence for Legal Service Delivery, see:

- Predictive Intelligence
- Configure Predictive Intelligence for Legal Service Delivery
- Use Predictive Intelligence for Legal Service Delivery
- Predictive Intelligence for Legal Service Delivery reference

Solution definitions and business rules for Predictive Intelligence for Legal Service Delivery

Solution definitions and business rules are defined to train, test, and monitor the predictive intelligence solution.

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Solution definitions

The solution definition for Predictive Intelligence for Legal Service Delivery is available when you activate Predictive Intelligence plugin (com.glide.platform_ml) and Predictive Intelligence for Legal Service Delivery (sn_lg_pi) plugin. You can customize the solution definition to meet your business requirements.

You can also create and train machine-learning solutions as per your requirement. For more information, see Predictive Intelligence.

The following solution definitions are available in the base system. You can access the solution definition by navigating to **All** > **Predictive Intelligence** > **Classification** > **Solution Definitions**.

Note: The solutions definitions in the base system are not trained. You need to train them on your instance before using them.

Predictive Intelligence for Legal Service Delivery solution definitions

Solution Type	Solution Definition	Description
Classification	Legal Request Sub-categorization	Predicts the subcategory for general legal request based on short description and description.
Classification	Ethics Complaints Sub-categorization	Predicts the subcategory for ethic complaints based on description.
Classification	Legal Request Assignment	Predicts the assignment group for general legal request based on short description, description, and subcategory.
Classification	Ethics Complaints Assignment	Predicts the assignment group for ethic complaints based on description and subcategory.

Use cases

The following use cases are available in the base system. You can access use cases by navigating to **All** > **Legal Administration** > **Legal AI Configurations**.

Legal Service Delivery use cases

Use case	Description
Legal Request Assignment	Predicts the assignment group for general legal request based on short description, description, and subcategory.
Legal Request Sub-categorization	Predicts the subcategory for general legal request based on short description and description.
Ethics Complaints Assignment	Predicts the assignment group for ethic complaints based on description and subcategory.
Ethics Complaints Sub-categorization	Predicts the subcategory for ethic complaints based on description.

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Business rules

The business rule triggers the predictive intelligence to predict the assignment group and sub categorization. The following business rules are available in the base system. To complete the solution definition and use cases available in the base system, create a business rule for Ethics Complaints.

You can create your own solution for any fields based on your requirement. For any solution definition defined, create a corresponding business rule.

Predictive Intelligence for Legal Service Delivery business rules

Solution Definition	Description
Predict legal request assignment group	Predicts the assignment group for general legal request based on short description, description, and subcategory.
Predict legal request subcategory	Predicts the subcategory for general legal request based on short description and description.

Configure Predictive Intelligence for Legal Service Delivery

Install and configure the Predictive Intelligence for Legal Service Delivery.

Configuration overview

Activate Predictive Intelligence for Legal Service Delivery

You can activate the Predictive Intelligence for Legal Service Delivery plugin (sn_lg_pi) for Legal Service Delivery if you have the admin role.

Before you begin

Predictive Intelligence for Legal Service Delivery requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

Roles are installed with Predictive Intelligence for Legal Service Delivery:

For more information, see Components installed for Advanced Work Assignment for Legal Service Delivery reference.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Predictive Intelligence for Legal Service Delivery plugin (sn_lg_pi) using the filter criteria and search bar.

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You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Train the classification solution to predict the subcategory for General Legal Request

Train the classification solution definitions to identify and predict an subcategory using short description and description for General Legal Request.

Before you begin

Role required: sn_lg_pi.admin and platlform_ml_read
Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for Legal Service Delivery (sn_lg_pi) plugins.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. In the Classification Definitions list, search for and select the Legal Request Sub-categorization (ml_x_snc_sn_lg_pi_global_legal_request_sub_categorization) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Classification Definition form fields, see Create and train classification solution.

Train the classification solution to predict the assignment group for General Legal Request

Train the legal request classification solution definition to identify and predict an assignment group using the short description, description and subcategory for General Legal Request.

Before you begin

Role required: sn_lg_pi.admin and platlform_ml_read
Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for Legal Service Delivery (sn_lg_pi) plugins.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. In the Classification Definitions list, search for and select the Legal Request Assignment (ml_x_snc_sn_lg_pi_global_legal_request_assignment) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Classification Definition form fields, see Create and train classification solution.

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Train the classification solution to predict the subcategory for Ethics Complaint

Train the legal request classification solution definition to identify and predict an subcategory using the description for an Ethics Complaint.

Before you begin

Role required: sn_lg_pi.admin and platlform_ml_read
Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for Legal Service Delivery (sn_lg_pi) plugins.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. In the Classification Definitions list, search for and select the Ethics Complaints Sub-categorization (ml_x_snc_sn_lg_pi_global_ethics_complaints_sub_categorization) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Classification Definition form fields, see Create and train classification solution.

Train the classification solution to predict the assignment group for Ethics Complaint

Train the legal request classification solution definition to identify and predict an group assignment using the description and subcategory for an Ethics Complaint.

Before you begin

Role required: sn_lg_pi.admin and platlform_ml_read
Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for Legal Service Delivery (sn_lg_pi) plugins.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. In the Classification Definitions list, search for and select the Ethics Complaints Assignment (ml_x_snc_sn_lg_pi_global_ethics_complaints_assignment) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Classification Definition form fields, see Create and train classification solution.

Configure fields to be displayed in Activity stream

Configure fields to be displayed in the Activity stream.

Before you begin

Role required: sn_lg_ops.legal_config

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Requests** > **All**.
2. Select a legal request to customize Activity stream for.
3. Select the activity stream icon .
4. Select the filter activity icon .

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5. Select **Configure available fields**.
6. Select the fields from Available list and add to Selected list.
7. Set the desired order.
8. Select **Save**.
9. Select **Update** to save the changes to the legal request form.

Use Predictive Intelligence for Legal Service Delivery

Use the Predictive Intelligence solution to predict and auto populate or view the suggestions for sub-category and assignment group.

Legal requests can be automatically assigned using assignment rules, Advanced Work Assignment or Predictive Intelligence. For more information, see Assigning legal request.

Use Predictive Intelligence for Legal Service Delivery

Use the Predictive Intelligence solution to predict and auto populate or view the suggestions for sub-category and assignment group.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

About this task

- Ensure you have installed and configured the Predictive Intelligence for Legal Service Delivery plugin (sn_lg_pi). For more information, see Configure Predictive Intelligence for Legal Service Delivery
- Ensure the solution definitions are trained on your ServiceNow instance.
- When a legal request is submitted, the Predictive Intelligence feature predicts values for the subcategory and assignment group based on solution definitions.
- Under the following conditions, the values are predicted again.
  - When the short description or description is modified, the subcategory is predicted again.
  - When short description, description or subcategory is modified, the assignment group is predicted again.

  The conditions under which the values are predicted again are defined in the business rules. For more information, see Solution definitions and business rules for Predictive Intelligence for Legal Service Delivery

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the list icon ( ).
3. In the **Lists** tab, open a General Legal Request or Ethics Complaints by selecting an option under **Legal Requests**.
   - Predictions for Subcategory and Assignment group are available.
   - Fields with high confidence predictions are automatically updated with the predicted value.

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- Fields with medium and low confidence predictions are not automatically updated but the values are shown as suggestions.
- The Activity stream is also updated with the predicted values. You can customize the activity stream to display additional fields. For more information, see Configure fields to be displayed in Activity stream.

Predictive Intelligence for Legal Service Delivery reference

Reference topics provide additional information about components installed, the lists and forms that you use in Predictive Intelligence for Legal Service Delivery reference.

Components installed with Predictive Intelligence for Legal Service Delivery

Several types of components are installed with activation of the Predictive Intelligence for Legal Service Delivery application, including user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with Predictive Intelligence for Legal Service Delivery

Role title [name]	Description	Contains roles
Predictive Intelligence for Legal Service Delivery administrator [sn_lg_pi.admin]	Provides administrative access to Predictive Intelligence for legal applications.	• ml_admin • sn_lg_ops.legal_user

Tables

Tables installed with Predictive Intelligence for Legal Service Delivery

Role title [name]	Description
Legal AI Configuration [sn_lg_ai_configuration]	Stores information related to use cases for the solution definitions.

Advanced work assignment for Legal Service Delivery

Use Advanced Work Assignment for Legal Service Delivery feature to automatically assign legal requests to agents from the legal department (a paralegal staff or lawyer) based on availability, capacity, and optionally skills.

To route legal requests using skills, you need to set up Skills Management. For more information, see Skills Management

Note: If you're using skill management, ensure you have the right subscription.

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Get started

Explore  Learn about Advanced work assignment for Legal Service Delivery	Configure  Install and configure Advanced work assignment for Legal Service Delivery
Use  Use Advanced work assignment for Legal Service Delivery	Reference  Get details about components such as roles, tables, plugins, and store applications that are installed.

Troubleshoot and get help

- Ask questions and explore other resources for Advanced work assignment for Legal Service Delivery in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Explore Advanced Work Assignment for Legal Service Delivery

Use the ServiceNow Advanced Work Assignment for Legal Service Delivery feature to automatically assign legal to agents based on availability, capacity, and optionally skills.

Advanced Work Assignment for Legal Service Delivery overview

Advanced Work Assignment for Legal Service Delivery routes legal request to qualified agents from the legal department (a paralegal staff or lawyer) using work item queues, routing conditions, and assignment criteria that you define. The base system has configuration available for General Legal Request and Ethics Complaint. You can define your own configuration for other types of legal requests.

For more information, see Exploring Advanced Work Assignment.

If you want to use skills as one of the criteria for routing legal requests, ensure you have activated Skills Management [com.snc.skills_management]. For more information, see Skills Management

Note: If you're using skill management, ensure you have the right subscription.

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Advanced Work Assignment for Legal Service Delivery workflow

1. The legal Advanced Work Assignment administrator configures Advanced Work Assignment for Legal Service Delivery.
2. A new legal request is submitted
3. Advanced Work Assignment for Legal Service Delivery workflow identifies the new request to the available agents based on the availability, capacity and skills.
4. The legal fulfiller accepts or rejects the work assignment.
   a. The legal fulfiller accepts the assignment and works on it.
   b. The legal fulfiller rejects the assignment. The legal request is reassigned to another agent as per the availability, capacity and skills.

Advanced Work Assignment for Legal Service Delivery benefits

Advanced Work Assignment for Legal Service Delivery benefits

Benefit	Feature	Users
Automatic assignment of legal request based on availability, capacity and skills.	Advanced Work Assignment	Legal fulfiller

For more information on the benefits of Advanced Work Assignment, see Exploring Advanced Work Assignment

What to explore next

To learn more about configuring and using Advanced Work Assignment for Legal Service Delivery, see:

- Configure Advanced Work Assignment for Legal Service Delivery
- Use Advanced Work Assignment for Legal Service Delivery
- Components installed for Advanced Work Assignment for Legal Service Delivery reference

Configure Advanced Work Assignment for Legal Service Delivery

Configure the Advanced Work Assignment for Legal Service Delivery.

Configuration overview

Activate Advanced Work Assignment for Legal Service Delivery

Activate the Advanced Work Assignment for Legal Service Delivery plugin (sn_lg_awa) for Legal Service Delivery if you have the admin role

Set up Advanced Work Assignment for Legal Service Delivery

Configure various components, such as service channels, work item queues, and assignment rules that determine how a legal request should be routed to an agent.

Activate Skills Management

If you are going to use skill determination rules to map a skill to an legal request, activate Skills Management [com.snc.skills_management].

> **Note:** If you're using skill management, ensure you have the right subscription.

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Activate Advanced Work Assignment for Legal Service Delivery

You can activate the Advanced Work Assignment for Legal Service Delivery plugin (sn_lg_awa) for Legal Service Delivery if you have the admin role.

Before you begin

Advanced Work Assignment for Legal Service Delivery requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

Roles are installed with Advanced Work Assignment for Legal Service Delivery:

For more information, see Components installed for Advanced Work Assignment for Legal Service Delivery reference.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Advanced Work Assignment for Legal Service Delivery plugin (sn_lg_awa) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

What to do next

- If you are going to use skill determination rules to map a skill to an legal request, activate Skills Management [com.snc.skills_management].

  Note: If you're using skill management, ensure you have the right subscription.

- Configure live agent support for legal services. For more information, see Configure Virtual Agent conversation topics for legal services.

Set up Advanced Work Assignment for Legal Service Delivery

Configure various components, such as service channels, work item queues, and assignment rules that determine how a legal request should be routed to an agent.

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Before you begin

Role required: admin

The base system includes the Advanced Work Assignment solution for General Legal Requests and Ethics Complaints. You can also configure it for other types of legal requests.

Procedure

1. Navigate to **All** > **Advanced Work Assignment**.
2. Create a service channel to automatically route incoming legal requests to agents.

   For more information, see Create or configure a service channel.

   The following service channels are available in the base system Advanced Work Assignment for Legal Service Delivery.

   - Legal Request
   - Chat

   After you have created a service channel, do the following:

   a. Configure the agent capacity to determine the number of work items that can be automatically assigned to agents supporting a service channel. For more information, see Override agent capacity for selected agents.

   b. Create or change an inbox layout to determine the information shown on work item cards displayed in an agent's inbox. For more information, see Create or change an inbox layout.

   c. Create a work item size override if you want to calculate an agent's workload using a work item size other than the default. For more information, see Create or change a work item size override.
3. Make your service channel available in Agent Workspace by adding it to the Presence States.

   a. Navigate to **All** > **Advanced Work Assignment** > **Presence States**.

   b. Select **Available**.

   c. On the form, move the following to selected list.

   - Legal Request
   - Chat

   d. Select Active (if not already selected).

   e. Select **Update**.
4. Define or change a queue so that you can determine which work items are routed automatically to agents through a given service channel.

   The following queues are available in the base system for Advanced Work Assignment for Legal Service Delivery.

   - General Legal Request
   - Ethics Complaint

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Note: A queue is a unique alphanumeric identifier assigned to an application. If the application does not appear in the queue table, verify that its queue is not being used by another application. If it is already in use, create a new queue. For more information, see Create a work item queue.

5. Set the Advanced Work Assignment criteria for assigning work items to agents.
   For more information, see Configure agent assignment rules.

   An assignment rule Capacity and skill based assignment for Legal Requests is available in the base system for Advanced Work Assignment for Legal Service Delivery.

6. **Optional:** Use Skill Determination Rules as an alternative way to map skills to an legal request case.
   If you are going to use skill determination rules to map a skill to an legal request, activate Skills Management. For more information, see Skills Management.

   Skill determination rule for Legal is available in the base system for Advanced Work Assignment for Legal Service Delivery.

7. **Optional:** Configure the following parameters to improve your Advanced Work Assignment functionality:

   a. Create or modify the availability states that agents use to indicate whether they can receive work or are offline or away. Agents set these states in their Workspace Inbox. For more information, see Configure agent presence states. Add the service channel to

   b. Define the reasons that agents can use to decline work assignments that they receive in their Agent Workspace inbox. For more information, see Configure reasons for rejecting work items.

   c. Prevent an agent from being assigned too many work items by configuring the agent's maximum universal capacity. For more information, see Configure an agent's maximum universal capacity.

   d. Create or manage groups that have associated Advanced Work Assignment queues. For more information, see Create or change groups for Advanced Work Assignment queues.

      The following queues are available in the base system for Advanced Work Assignment for Legal Service Delivery.

      - Legal - Ethics
      - Legal Department

   For detailed instructions on how to configure Advanced Work Assignment, see Configuring Advanced Work Assignment.

Use Advanced Work Assignment for Legal Service Delivery

Use the ServiceNow Advanced Work Assignment for Legal Service Delivery feature to automatically assign legal to agents based on availability, capacity, and skills.

Legal requests can be automatically assigned using assignment rules, Advanced Work Assignment or Predictive Intelligence. For more information, see Assigning legal request.

Accept incoming legal request

As a legal fulfiller, accept or reject to an incoming legal request assignment from the Legal Counsel Center Inbox.

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Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Select the Inbox icon ().
3. Select **Available** from **Status** to indicate that you are available.
4. When a legal request assignment comes through the chat queue, accept or reject the **Accept**.

Action	Steps
Accept assignment	Select **Accept**. **Note:** The legal request will be as signed to you.
Reject assignment	Select **Reject**. **Note:** The legal request will be as signed to next agent available according to the availability, capacity and skills.

Advanced Work Assignment for Legal Service Delivery reference

Reference topics provide additional information about components installed, the lists and forms that you use in Advanced Work Assignment for Legal Service Delivery.

Components installed for Advanced Work Assignment for Legal Service Delivery reference

Several types of components are installed with activation of the Advanced Work Assignment for Legal Service Delivery plugin application, including user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with Advanced Work Assignment for Legal Service Delivery

Role title [name]	Description	Contains roles
Advanced Work Assignment for Legal Service Delivery administrator [sn_lg_awa.admin]	Provides administrative access to Advanced Work Assignment for legal applications.	• awa_admin • sn_lg_ops.legal_user

Legal services on the Employee Center portal

Employees can submit and track requests to get legal support or get information on legal services through the Employee Center portal.

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Legal Service Portal enables employees to submit legal requests to get services and support from the legal department only. Whereas ServiceNow® Employee Center provides a single and unified portal experience for employees to find information and request services across various departments, including Legal. Using the Content Taxonomy framework, you can modify the default Legal taxonomy to include your service-specific content types and child topics.

To enable legal services on the Employee Center portal, ensure you've the following ServiceNow applications and plugins installed:

- Legal Service Delivery applications
- Employee Center plugin (sn_ex_sp)
- Employee Experience Taxonomy plugin (sn_ect)

Legal taxonomy on Employee Center

The base system taxonomy — Employee — is installed when you install the Employee Experience Taxonomy plugin. To provide legal services, the following Legal taxonomy structure is available by default under the Employee taxonomy:

1. **Contracts** – Contains Sales Contract Review, Third Party Contract Review, and NDA intake forms.
2. **Privacy and Data** – Contains the Privacy Impact Assessment intake form.
3. **Ethics and Compliance** – Contains the Conflict of Interest, Stock Preclearance, and Ethics Complaints intake forms, and a knowledge base article on Insider Trading Policy. When enabled, an ethics complaint can also be submitted through the Anonymous Report Center portal.
4. **Browse all legal** – Contains General Legal Request, Marketing Content Review, Digital Forensics, and Subpoena intake forms.

Enabling legal services on the Employee Center portal

Complete the following tasks to enable legal services on the Employee Center portal:

1. To customize the base system taxonomy, duplicate the taxonomy and then make the required changes in the cloned taxonomy.

   For more information, see Clone taxonomy for employee content.

2. Create intake forms and knowledge base articles for legal services and support.

   For more information on creating a legal request intake form, see intake forms for legal requests; and for more information on creating a knowledge base article, see knowledge base articles.

3. Associate the content with a topic in the taxonomy.

   For more information, see Associate connected content to a topic.

Approvals for legal items through Employee Center

Employee Center uses configurable approvals using Task Configuration for the approvers to view and approve various items. The approvers review the detailed information about the item that needs approval from the **My Tasks** tab in Employee Center. The Task Configuration can be set up for both task tables (legal requests, legal matters, and practice area tables) and non-task tables (artifacts, matter templates, custodians and non-custodians, and external storage documents.)

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The following base system Task Configurations in the To-dos Configuration are available with Legal Service Delivery apps:

- Legal Request Management
  - Legal Requests
  - Legal Request Attachments
  - Legal Request External Documents
- Legal Matter Management
  - Legal Matters
  - Legal Matter Attachments
  - Legal Matter External Documents
  - Legal Matter Tasks
  - Legal Matter Artifacts
  - Legal Matter Templates
- Legal Digital Forensics
  - Custodial data
  - Non-Custodial data

Note: These new Task Configurations, which are mapped to tables of Legal Service Delivery apps, replace the existing To-dos Widget Mapping settings for the approvals via Employee Center. To use the existing mappings for approvals, you must disable the Task Configurations.

For more information about configurable approvals in the Employee Center and how to configure them, see Approvals hub.

Related topics

Setting up Employee Center

Unified taxonomy for Employee Center

Create a topic

Universal Request for Legal Service Delivery

Integrating Universal Request and Legal Service Delivery enables you to create a unified user experience for your employees to request services from the Legal department. Legal services can be provided to employees seamlessly without them having to deal with the difficulties of interdepartmental collaboration for resolution.

Journey of a universal request for a legal service

The ServiceNow® Universal Request application enables cross-departmental reporting from the time of an initial employee request through the final issue resolution. For more information, see Universal Request.

The Legal Request Management application provides a unified mechanism for employees to get all the information, services, and help that they need from the legal department.

You can fulfill requests across the organization to improve the employee experience by integrating legal requests with universal requests.

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- An employee submits a universal request using the **Request help** option in the Employee Center portal. The employee can also submit a direct legal request attached to a universal request.
- A routing agent identifies this request related to the Legal department and creates a legal request from the universal request. The legal request becomes the primary ticket of the universal request.
- Based on the services requested, a legal fulfiller can do the following while working on the legal request:
  - Provides a resolution and closes the legal request. The universal request also gets closed.
  - Transfers the request to another department or back to the universal request routing group with or without resolution.
  - Creates associated tickets for the tasks to be done by users in the Legal or any other department required to fulfill the request.
  - Marks the legal request as Restricted if it contains any sensitive or confidential information. Routing agents from the current assignment group with the sn_uni_req.sensitiveinfo_agent role, and the primary ticket agent can view the complete details of the ticket. Other routing agents cannot see fields in the universal request that may contain sensitive information, such as **Short description** and **Description**.

The universal request gives requesters complete visibility into the status of their requests. They can view all the relevant details from the Activities stream of the universal request, including users who are working on the issue, transfers between departments, and other updates.

When the universal request is closed, the requester can reopen it if not satisfied with the resolution.

For more information about submitting and tracking a universal request, see Using Universal Request.

For more information on submitting and managing ethics complaints, see Better together solution: Legal Investigations and HR Service Delivery Employee Relations.

Required ServiceNow plugins and apps

For integrating universal requests for legal services, you must have the following ServiceNow plugins and application installed:

- Universal Request plugin (com.snc.universal_request)
- Legal Request Management app 6.1 or later version
- Employee Center app

Also, you've to configure various settings in Universal Request. For more information, see Configure Universal Request for legal services.

Configure Universal Request for legal services

Review the base system configurations for integration of legal requests with universal requests and configure as per your business needs.

Before you begin

Ensure that you've the following plugins activated and apps installed:

- Universal Request plugin (com.snc.universal_request)
- Legal Request Management version 6.1

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You can also install Employee Center to provide employees to submit requests.

Role required: admin

About this task

Legal Request Management version 6.1 installs the service set, service set assignment group, transfer configuration, and state mappings required for the legal requests to work with the universal requests.

Procedure

1. Navigate to **All** > **Universal Request** > **Administration**.
2. Review and configure the following settings as per your business needs.

Setting	Description
Service set	A service set represents a department in your organization. The service set configured in Universal Request enables you to use the UR capabilities for a department. **Legal** is the base system service set available for the Legal department. For more information, see Create a service set.
Service for Universal Request	Register your service name for your service specific table and associate it with a service set (department) to use the Universal Re quest capabilities for a specific service in your organization. For more information, see Create your service for Universal Request
Mapping configuration	The mapping configuration enables you to configure a target table from the service set (department) and then map fields from the tar get table and Universal Request table to cre ate and transfer department-level tickets. For more information, see Configure map pings. You can update the `LegalUniversalRe quest` script include to map additional legal request and universal request fields in addi tion to the default mapped fields.
Service set assignment group	A service set must be assigned an assign ment group for automatically routing universal requests to the appropriate agents (assign ment group) within a certain department (ser vice set).

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Setting	Description
	Legal Routing Group is the base system as signment group assigned to the Legal service set. For more information, see Assign assignment group to your service.
State mapping	The state mapping enables you to map the states of the legal request and the universal request so that the changes in the state of the legal request are reflected in the state of the universal request. For example, say the legal request's states—New, Assigned to, and Work in Progress—are mapped to the In Progress state of the univer sal request. So, when a legal request is in any of these states, the universal request's state shows as In Progress. For more information, see Universal Request state mapping.
Transfer Configuration	The transfer configuration helps you to set the mandatory field updates, transfer, and clo sure information when transferring a legal re quest to another department or back to the universal request. For more information, see Transfer configura tion.

3. Add users to the **Legal Routing Group** service set assignment group.
   Legal Routing Group is the base system assignment group with the required roles added. Users in the assignment group will act as the routing agent, triaging the universal request and creating of legal requests to get support from the Legal department.
4. Select the **Enable Legal Request creation From Universal Request** option from the **Options** field of an intake form in a practice area.
   For more information, see Add an intake form to a practice area.

Create a legal request from a universal request

Create a legal request from a universal request to get the Legal department's assistance in resolving the request.

Before you begin

Ensure you have the Universal Request application installed and related configuration for legal services completed by the administrator.

An employee has submitted a universal request and the universal ticket is assigned to you.

Important: The routing agent with the required roles must also be a member of the Legal Routing Group assignment group.

Role required: sn_lg_ops.legal_user and sn_uni_req.universal_request_write

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About this task

A routing agent can also create a legal request from a universal request through the Agent mobile app. For creating legal ticket for a complaint, see Create an ethics legal matter from a universal request.

Procedure

1. Navigate to **All** > **Universal Request** > **Assigned to me**.
2. Open the universal request from which you want to create a legal request.
3. Click **Create Legal Ticket**.
4. In the Create Legal Ticket dialog box, fill in the fields.
   a. From the **Request type** list, select a legal request type.
   b. In **Additional comments**, enter details about the service and support required from the Legal department.
5. Click **Create**.

Result

- A legal request is created and becomes the primary ticket for the universal request. The legal request number is populated in the **Primary Ticket** field.
- The state of the universal request changes to In Progress.
- The **State reason** field displays with the pre-populated value Primary Ticket - In Progress.

What to do next

In the Legal department, the legal request is assigned a legal fulfiller. The assigned legal fulfiller works on the legal request and provides the resolution, or transfers the legal request to another department or back to the Universal Request.

To transfer the general legal request back to the Universal Request with external storage enabled, activate the **Name UR Transfer Post Processor** script action to sync the attachments. The script action is available in **All** > **Event** > **Script Actions**.

Transfer a legal ticket to another department

Transfer a legal ticket (legal request or legal matter) associated with a universal request to another department or back to the universal request for processing and resolution.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the List icon ( ).
3. Open the list of legal requests or legal matters.
   - To open the legal request list, in the **Lists** tab, select **Assigned to Me** under **Legal Requests**.
   - To open the legal matter list, in the **Lists** tab, select **Assigned to Me** under **Matters**.
4. Open a legal request or legal matter that you want to transfer.
5. Select **Transfer**.
6. In the Transfer Ticket dialog box, fill in the fields.

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Transfer Ticket dialog box

Field	Description
Action	Transfer options to other department or back to universal request.
Department	Department to which you want to transfer the request. If the user is not sure which department to transfer the legal ticket to, the **I'm not sure** option transfers the ticket back to the universal request.
Service	The service or request type within the selected department. **Note:** **Employee Relations** must be selected to transfer an ethics complaint legal matter to the Human Resources department. For any other service selected, an error message is displayed.
Transfer reason	Option to specify whether the legal ticket is being transferred with a resolution. ○ **Transfer with resolution**: The legal ticket is resolved and needs further processing by another department. The state of the legal ticket will update to Close Complete. ○ **Transfer without resolution**: The legal ticket is not resolved or does not belong to the Legal department. The state of legal ticket will update to Close Incomplete.
Transfer notes	Details that might be useful for the department to know for further processing.
Copy additional comments and attachments	Options for including additional comments and attachments from the legal ticket to the request of another department with the transfer. By default, this option is selected. If the additional comments and attachments shouldn't be transferred, clear the check box.

7. Select **Transfer**.

Result

- The legal ticket is transferred to the selected department.
- The legal ticket no longer remains a primary ticket for the universal request.

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Integration of Legal Service Delivery with third-party applications

Extend Legal Service Delivery capabilities by integrating with third-party applications.

Microsoft Outlook Add-In for Legal Service Delivery

The ServiceNow® Microsoft Outlook Add-In for Legal Service Delivery enables you to submit legal requests and matters from within Microsoft Outlook. You can receive requests or information over email. Use the add-in to submit legal requests or matters without having to log in to the instance. For adding attachments, just drag and drop emails, email attachments or attach files from your system.

Microsoft Outlook Add-In for Legal Service Delivery

The ServiceNow® Microsoft Outlook Add-In for Legal Service Delivery enables you to submit legal requests and matters from within Microsoft Outlook. You can receive requests or information over email. Use the add-in to submit legal requests or matters without having to log in to the instance. For adding attachments, just drag and drop emails, email attachments or attach files from your system.

Get started

Explore



Learn about Microsoft Outlook Add-In for Legal Service Delivery

Configure



Install and configure Microsoft Outlook Add-In for Legal Service Delivery

Use



Use Microsoft Outlook Add-In for Legal Service Delivery to submit legal requests and matters from within Microsoft Outlook

Reference



Get details about components such as roles, tables, plugins, and store applications that are installed.

Troubleshoot and get help

- Ask questions and explore other resources for Legal Request Management in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

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Explore Microsoft Outlook Add-In for Legal Service Delivery

Learn more about Microsoft Outlook Add-In for Legal Service Delivery through a sample workflow and review the benefits it can provide.

Microsoft Outlook Add-In for Legal Service Delivery overview

Microsoft Outlook Add-In for Legal Service Delivery enables legal fulfiller to submit legal requests and matters from within Microsoft Outlook. Legal fulfiller get seamless experience without having to leave the Microsoft Outlook client.

Microsoft Outlook Add-In for Legal Service Delivery users

Users

User	Description
Legal request fulfiller	Legal request fulfiller can submit legal request, view details and add attachments for the assigned legal requests directly from the Microsoft Outlook.
Legal matter fulfiller	Legal matter fulfiller can submit legal matters, view details and add attachments for the assigned legal matters directly from the Microsoft Outlook.

Microsoft Outlook Add-In for Legal Service Delivery workflow

1. The legal administrator enables intake forms for ServiceNow for Legal add-in.
2. The legal request fulfiller perform the following actions:
   a. Selects an email in Microsoft Outlook for which legal request needs to be submitted.
   b. Opens Microsoft Outlook Add-In for Legal Service Delivery.
   c. Logs into Microsoft Outlook Add-In for Legal Service Delivery.
   d. Selects option to submit a new request.
   e. Fills in the required information and submits the legal request.

Microsoft Outlook Add-In for Legal Service Delivery benefits

Microsoft Outlook Add-In for Legal Service Delivery benefits

Benefit	Feature	Users
Create legal requests and matters from within Microsoft Outlook for the requests or information received over an email without having to log into your instance.	Submit, view, search and manage legal request and matter	• Legal request fulfiller • Legal matter fulfiller

What to explore next

To learn more about configuring and using , see:

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- Configure Microsoft Outlook Add-In for Legal Service Delivery
- Use Microsoft Outlook Add-In for Legal Service Delivery
- Microsoft Outlook Add-In for Legal Service Delivery reference

Configure Microsoft Outlook Add-In for Legal Service Delivery

Install and add the Microsoft Outlook Add-In for Legal Service Delivery to your Microsoft Outlook and enable intake forms for submitting legal requests or matters.

Activate Microsoft Outlook Add-In for Legal Service Delivery

You can activate the Microsoft Outlook Add-In for Legal Service Delivery plugin (sn_lg_outlook) for Legal Service Delivery if you have the admin role.

Before you begin

Microsoft Outlook Add-In for Legal Service Delivery requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: sn_lg_outlook.admin

About this task

Roles are installed with Microsoft Outlook Add-In for Legal Service Delivery:

For more information, see Microsoft Outlook Add-In for Legal Service Delivery reference.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Microsoft Outlook Add-In for Legal Service Delivery plugin (sn_lg_outlook) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Download Microsoft Outlook Add-In for Legal Service Delivery manifest file

As an admin, download Microsoft Outlook Add-In for Legal Service Delivery manifest file.

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Before you begin
Role required: sn_lg_outlook.admin

Procedure
1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In Manifests**.
2. From the Office Manifests list, select **ServiceNow for Legal**.
3. Select **Download Manifest** to download the file.
4. If your ServiceNow instance is configured with single sign-on (SSO) login, update the manifest file.
   a. Open the manifest file.
   b. Locate the `AppDomains` element.
   c. Add a `AppDomain` element and enter the SSO URL inside it.
   Example
   ```
   <AppDomains>
   <AppDomain><Instance URl></AppDomain>
   <AppDomain><SSO URl></AppDomain>
   </AppDomains>
   ```
   d. Save the manifest file.

What to do next
Deploy Microsoft Outlook Add-In for Legal Service Delivery.

Deploy Microsoft Outlook Add-In for Legal Service Delivery

Deploy Microsoft Outlook Add-In for Legal Service Delivery for it to be available in Microsoft Outlook to submit legal requests.

Before you begin
Role required: sn_lg_ops.request_fulfiller

Procedure
1. Open Microsoft Outlook.
2. On the Outlook ribbon, click **Get Add-ins**.
3. Select **My add-ins**.
4. In the Custom add-ins section, select **Add a custom add-in** > **Add from file**.
5. Select the manifest file that you have downloaded.
6. Select **Install**.

Result
The ServiceNow for Legal Add-in is available in the Outlook ribbon.

If you do not want to open the ServiceNow for Legal add-in each time you select a new email, keep it pinned by making changes to the manifest file. For more information on the changes to be made to the manifest file, see Implement a pinnable task pane in Outlook topic in the Microsoft Outlook documentation.

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Enable intake forms for Microsoft Outlook Add-In for Legal Service Delivery

Enable intake forms to be available as categories while submitting legal requests or matters from Microsoft Outlook using Microsoft Outlook Add-In for Legal Service Delivery.

Before you begin
Role required: sn_lg_ops.legal_config

Procedure

1. Navigate to **All** > **Legal Administration** > **Practice Areas**.
2. Select a practice area.
3. From the Intake Forms related list, select an intake form.
4. If you are prompted in a message at the top of the form to switch applications to be able to edit the record, select the word **here**.
5. Select the Unlock Options icon in the **Options** field in the Record Producer section.
6. Enter `Enable` in the **Select target record** field.
7. Select **Enable for Microsoft Outlook Add-in** from the list.
8. Select **Update**.

Result
The request category will be available while submitting a legal request from Microsoft Outlook Add-in.

Auto populate information from email to legal request or matter

Map the sender's email address, email content, and subject field from an email to legal request fields to automatically fill in information from the email to the submitted legal request.

Before you begin
Role required: sn_lg_ops.legal_config

About this task
The script include **OutlookMappingConfig** available in the base system supports the mapping of the following variables of the email.

- *`subject`* - Subject of the email.
- *`fromEmail`* - Sender's email address.
- *`body`* - Email content

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. Select the **OutlookMappingConfig**.
3. Define the email mapping with the intake forms of the practice area.
   a. Open the script include.
   b. Copy and paste the existing mapping object into the script field.
   c. Copy the sys_id of the intake form of the practice area that you want to map to the email.

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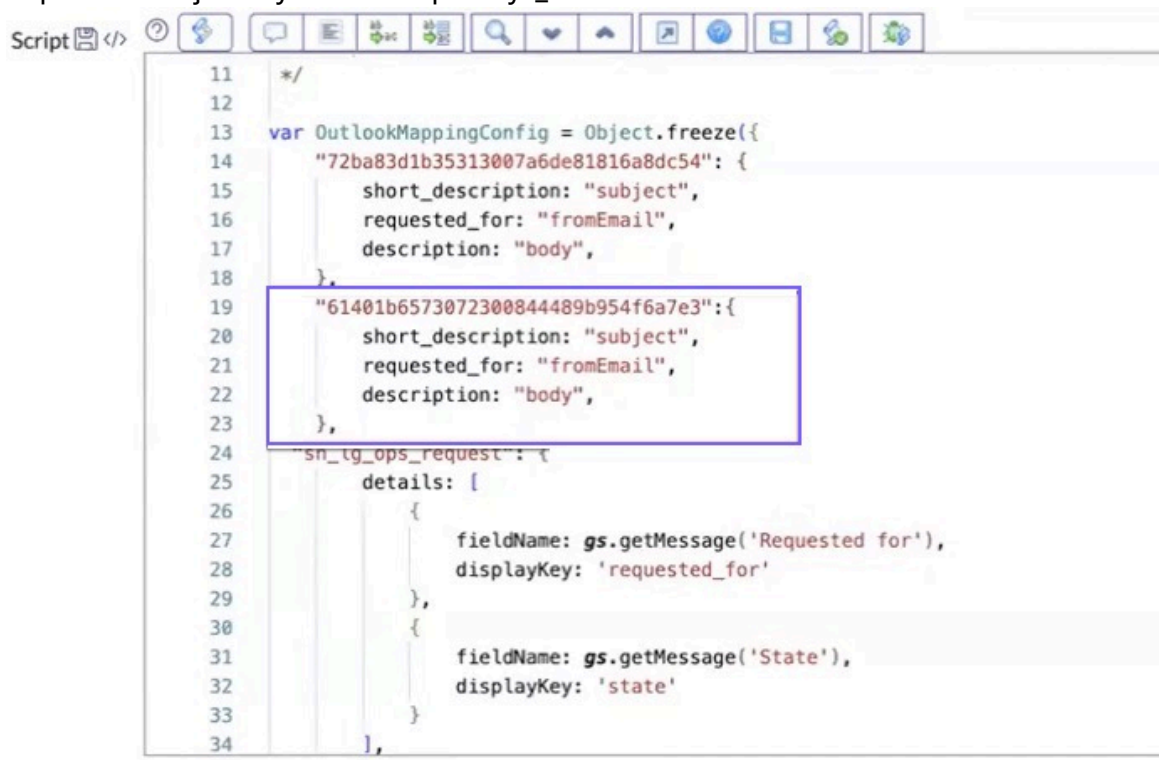
d. Replace the object key with the copied sys_id.



4. In the copied mapping object, specify the key-value pairs using the variables from the intake form.

Variables from email	Variables from legal request
subject	Specify the legal request variable into which you want to store the email subject line. Example: If you want to copy the subject of email into the short description of the legal request, map *`subject`* with *`short_description`* by including the following code. `short_description: "subject"`
fromEmail	Specify the legal request variable into which you want to store the sender's email address. Example: If you want to copy the sender's email address into the requested for of the legal re quest, map *`fromEmail`* with *`requested_for`* by including the following code. `requested_for: "fromEmail"`
body	Specify the legal request variable into which you want to store the email content.

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Variables from email	Variables from legal request
	Example: If you want to copy email content into the description, map *body* with *description* by including the following code. `description: "body"`

5. After defining the object, select **Update**.

Use Microsoft Outlook Add-In for Legal Service Delivery

Use the Microsoft Outlook Add-In for Legal Service Delivery to submit legal requests with attachments. You can submit requests, manage attachments, and view legal requests pr matters without leaving your Microsoft Outlook client.

Sign in to Microsoft Outlook Add-In for Legal Service Delivery

As a legal request fulfiller, sign in to Microsoft Outlook Add-In for Legal Service Delivery.

Before you begin

Ensure you have installed and configured Microsoft Outlook Add-In for Legal Service Delivery. For more information, see Configure Microsoft Outlook Add-In for Legal Service Delivery

Role required: sn_lg_ops.request_fulfiller or sn_lg_matter.matter_fulfiller

Procedure

1. Sign in to Microsoft Outlook Add-In for Legal Service Delivery using any of the two methods.

Method	Steps
Microsoft Outlook client	**a.** Open the Microsoft Outlook client. **b.** Select any email. **c.** On the Microsoft Outlook ribbon, select Service Now for Legal icon ().
Outlook Web App	**a.** Sign in to Microsoft Outlook from the browser. **b.** Select any email. **c.** From the header of the email, select the apps icon ( ). **d.** Select ServiceNow for Legal icon ().

2. Enter credentials as legal request fulfiller.
3. Select **Log in**.

Result

You are logged in and the Microsoft Outlook Add-In for Legal Service Delivery add-in lists the legal requests or matters you have access to.

Submit legal request or matter

As a legal request or matter fulfiller, submit a legal request or matter from within the Microsoft Outlook.

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Before you begin

Ensure you have installed and deployed Microsoft Outlook Add-In for Legal Service Delivery. For more information, see Configure Microsoft Outlook Add-In for Legal Service Delivery

Role required: sn_lg_ops.request_fulfiller or sn_lg_matter.matter_fulfiller

Procedure

1. Sign in to Microsoft Outlook Add-In for Legal Service Delivery.
   For more information, see Sign in to Microsoft Outlook Add-In for Legal Service Delivery.
2. Submit a legal request.
3. Select an email for which you want to submit a legal request.
4. Select **New**.
5. In the pop-up, select the legal request category.
   To see the legal request categories, enable the respective intake forms for the Outlook add-in. For more information, see Enable intake forms for Microsoft Outlook Add-In for Legal Service Delivery
6. Select **Create**.
   Legal request intake form will be displayed.
7. Enter the details in the intake form.
8. To attach documents, select Add attachments icon ( )
   For legal matter, select the artifact from the Artifact section and then select Add attachments icon ( )

Method	Steps
Add file from the system	**a.** Select **Choose a file**. **b.** Select the document. **c.** Select **Open**
Drag and drop file from the email	**a.** Select the document from the attachment. **b.** Drag and drop the file into the add attach ment pop-up.

9. Select **Submit**.
   A legal request is created in the New state.
10. Select **View details** to view the submitted legal request.
    To view the legal request or matters in the ServiceNow instance, select Open the request in workspace icon ( ).

View legal request from the Outlook add-in

As a legal request fulfiller, view legal requests and matters in the Microsoft Outlook Add-In for Legal Service Delivery.

Before you begin

Ensure you have installed and configured Microsoft Outlook Add-In for Legal Service Delivery. For more information, see Configure Microsoft Outlook Add-In for Legal Service Delivery

Role required: sn_lg_ops.request_fulfiller or sn_lg_matter.matter_fulfiller

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Procedure

1. Sign in to Microsoft Outlook Add-In for Legal Service Delivery.
   For more information, see Sign in to Microsoft Outlook Add-In for Legal Service Delivery.
2. On the Microsoft Outlook ribbon, select ServiceNow for Legal.
3. View the legal request.

Method	Steps
Using search	**a.** In the search box enter at least two char acters to search by Number, Short descrip tion, and Requested for Legal requests and matters matching the search criteria will be displayed. **b.** Select the legal request or matter.
For an email	**a.** Select the email. The legal request submitted for the email is displayed in the Created from this email section. **b.** Select the legal request.

   Legal request details are displayed and you can attach or delete documents.
4. To view the legal request or matters in the ServiceNow instance, select Open the request in workspace icon ( ).
   You can view the legal request or matters in the instance and perform actions that are available according to the current state.

Manage attachments from Microsoft Outlook Add-In for Legal Service Delivery

As a legal request fulfiller, add or delete documents in the legal request and matters from Microsoft Outlook Add-In for Legal Service Delivery.

Before you begin

Ensure you have installed and configured Microsoft Outlook Add-In for Legal Service Delivery.
For more information, see Configure Microsoft Outlook Add-In for Legal Service Delivery

Role required: sn_lg_ops.request_fulfiller or sn_lg_matter.matter_fulfiller

Procedure

1. Sign in to Microsoft Outlook Add-In for Legal Service Delivery.
   For more information, see Sign in to Microsoft Outlook Add-In for Legal Service Delivery.
2. Add attachment to the legal request

   a. In the search box enter at least two characters to search by Number, Short description, and Requested for

   b. Select the legal request or matter.
   Legal request or matter details are displayed.

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c. Select Add attachments icon ( )
For legal matter, select the artifact from the Artifact section and then select Add attachments icon ( )

Method	Steps
Add file from the system	**a.** Select **Choose a file**. **b.** Select the document. **c.** Select **Open**
Drag and drop file from the email	**a.** Select the document from the attachment. **b.** Drag and drop the file into the add attach ment pop-up.

3. Delete attachment from the legal request

a. In the search box enter at least two characters to search by Number, Short description, and Requested for

b. Select the legal request or matter.
Legal request or matter details are displayed.

c. Select Delete icon✖.
For legal matter, select the artifact from the Artifact section and then select Delete icon (✖).

d. Select **Ok** on the confirmation screen.
The document is deleted from the legal request.

Microsoft Outlook Add-In for Legal Service Delivery reference

Reference topics provide additional information about components installed, the lists and forms that you use in ServiceNow for Legal add-in for Outlook.

Components installed with Microsoft Outlook Add-In for Legal Service Delivery

Several types of components are installed with activation of the Microsoft Outlook Add-In for Legal Service Delivery application, including user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application .

Roles

Roles installed with Microsoft Outlook Add-In for Legal Service Delivery

Role title [name]	Description	Contains roles
Microsoft Outlook Add-In for Legal Service Delivery administrator	Provides administrative access to Microsoft Outlook Add-In for legal applications	sn_outlook_addin.outlook_addin_setup

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Roles installed with Microsoft Outlook Add-In for Legal Service Delivery (continued)

Role title [name]	Description	Contains roles
[sn_lg_outlook.admin]		

Search in Legal Service Delivery

Legal Service Delivery supports multiple search engines that helps you quickly find the most optimal information in the Legal Counsel Center and Employee Center.

Legal Service Delivery (LSD) supports the following search engines.

Search engines supported in LSD

Search engine	Available in
Zing search - Provides indexing and searching record data by table.	Enabled by default in the base system for the following: • Global search • Legal Counsel Center • Employee Center
AI Search - Provides a consumer-grade search engine with auto correction and most relevant results.	Enabled by default for the following when AI Search is activated: • Global search • Legal Counsel Center • Employee Center **Note:** If AI search is turned off for Legal Counsel Center or Employee center you need to enable it manually. For more information, see Configure AI Search for Legal Counsel Center and Configure search source when AI search is disabled.
Now Assist Q&A Genius Results - Provides concise, actionable answers search results from Knowledge article.	• Legal Counsel Center - Enabled by default when AI Search and Legal Service Delivery - Prime are activated. • Global search - Enable it manually. For more information, see Enabling Now Assist Q&A Genius Results. • Employee Center - Enable it manually. For more information, see Enable Now Assist genius results

For more information, see:

- Zing text indexing and search engine
- AI Search
- Now Assist for Legal Service Delivery (LSD)

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Legal Virtual Agent Conversations

The ServiceNow® Legal Virtual Agent Conversations application provides predefined conversation topics to enable automated chats with employees seeking legal services. You can build new topics or customize predefined topics to handle common legal requests from employees or guide them through self-service tasks.

Important: Starting with the Australia release, Legal Virtual Agent Conversations is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. There is no replacement for this plugin.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Features

- Automates handling of repetitive requests
- Reduces the response time for your employee queries
- Integrates with legal services to create requests on behalf of employees
- Provides live agent chat support

Predefined conversation topics for Legal Service Delivery

The Legal Virtual Agent Conversations application installs the following virtual agent conversation topics (chatbot conversations) to help employees with common self-service tasks in Legal Service Delivery. These conversation topics are grouped under the Legal Service Delivery category.

Check Legal Request and Matter status

Displays the status of legal requests and matters submitted by employees for themselves or on behalf of another employee.

General Legal Request

Helps employees create a general legal request. Based on the entered short description, it also provides links to relevant Legal knowledge base articles to resolve issues.

Privacy Assessment

Helps employees create a legal request to review whether projects comply with an organization's applicable privacy regulations and accepted privacy policy. The Legal department reviews such requests for potential risks and might recommend a mitigation plan if necessary.

Stock Trading

Helps employees to know about the stock trading window of your organization and with stock pre-clearance requests.

This virtual agent conversation topic is available only if you've installed the Legal Stock Preclearance application.

Legal Knowledge Base

Finds and displays Legal knowledge base articles based on the entered search string.

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Note: If Universal Request for legal services is enabled, the system creates a universal request and an associated legal request when an employee submits a legal request through virtual agent. General Legal Request, Privacy Assessment, and Stock Trading request types are supported.

Install Legal Virtual Agent Conversations

You can install the Legal Virtual Agent Conversations application (sn_lg_va) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Virtual Agent Conversations application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Note: To use the Live Agent support, install the Agent Chat (com.glide.interaction.awa) plugin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Virtual Agent Conversations application (sn_lg_va) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Virtual Agent Conversations.
4. Select **Install**.

Configure Virtual Agent conversation topics for legal services

Create or modify Virtual Agent conversation topics for legal services.

Before you begin

Role required: admin or virtual_agent_admin

About this task

The Legal Virtual Agent Conversations application installs various virtual agent conversation topics for seeking legal services.

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These virtual agent conversation topics are built using ServiceNow Virtual Agent Designer, so make sure you're familiar with the Virtual Agent Designer basics.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **> Designer**.
2. Configure a new conversation topic or customize a predefined conversation topic for a legal service.

   Note: All conversation topics for legal services are grouped under the Legal Service Delivery category.

Options	Steps
Create a new virtual agent conversation topic	**a.** In the Virtual Agent Designer page, click **+ Create.**. **b.** On the form, fill in the fields. For more information on creating a conversation topic and description of fields on the form, see
Customize a predefined conversation topic	**a.** In the Virtual Agent Designer page, click a conversation topic item to open. **b.** On the form, update the required fields and click **Update**. **Tip:** You can also duplicate the topic and then make the required changes in the newly created topic. To duplicate the topic, click **Duplicate**. For more information, see duplicate **c.** (Optional) Preview and test the topic in a chat test window by clicking **Test**.

3. Click **Publish** to make the conversation topic available to employees on the Virtual Agent client.
   For more information, see Publish a Virtual Agent topic.

Live agent support for legal services

Employees can contact a live agent from the Legal department (a paralegal staff or lawyer) via the Virtual Agent chat window to seek legal help.

Note: To use the Live agent support, you must install the Agent Chat (com.glide.interaction.awa) plugin.

Requester experience

Employees can connect to a live agent at any time during their ongoing virtual chats in the Legal Service Portal by clicking the support options icon ( ) in the Virtual Agent chat window and selecting **Contact Live Agent**.

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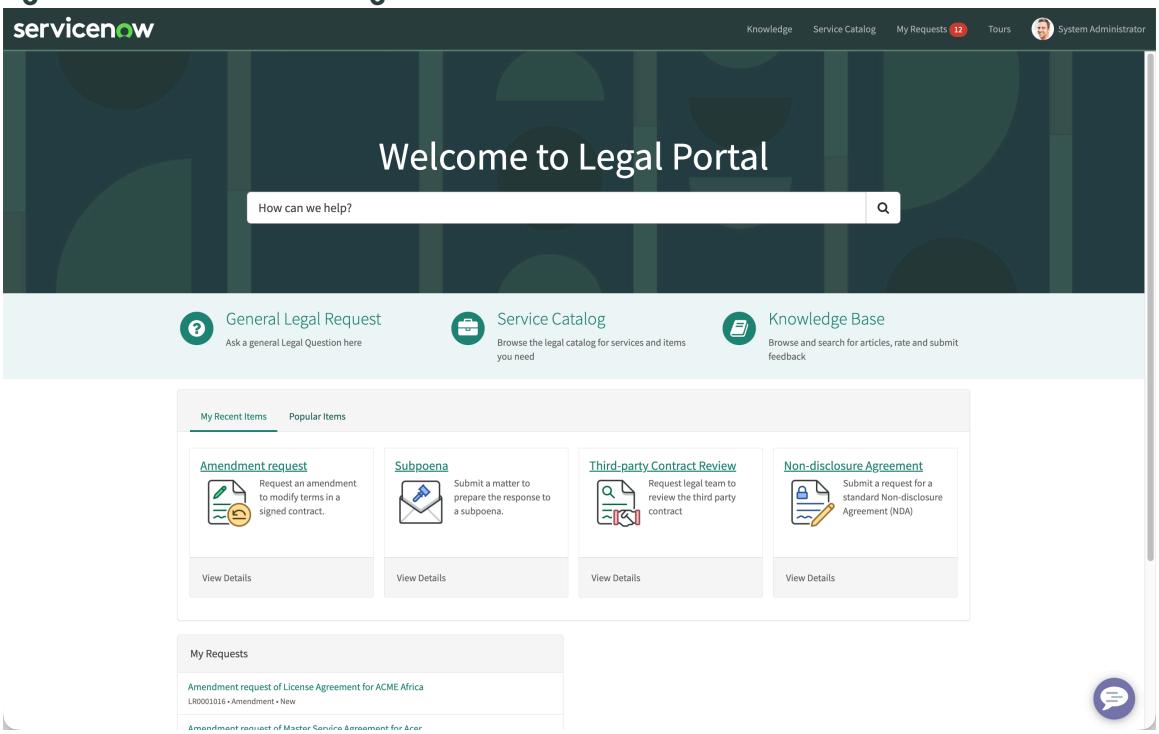
Note: The **Contact Live Agent** option is not available in Virtual Agent chat window on the Employee Service Center to connect with live agents in the Legal department.

Agent Chat window in the Legal Service Portal



If no agent accepts the chat request, the conversation automatically times out for the requesters.

Fulfiller experience

In the Legal Counsel Center, users in the Legal department with the legal_fulfiller role can make themselves available when they are ready to take any incoming chat requests.

Interaction records

When a live agent accepts an employee's chat request, an Interaction record is automatically created.

Other actions for live agents

While on a chat, live agents can do the following actions:

- Transfer the chat to another agent.
- Transfer the chat to another queue.
- Send attachments to the chat.

Related topics

Start a chat session through Legal Counsel Center Inbox

Configure live agent support settings for legal services

Configure settings to enable live agent support for legal services.

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Before you begin

- Ensure that you have the following applications installed:
  - Legal Request Management
  - Legal Virtual Agent Conversations
  - Legal Counsel Center
- Ensure you select **Load demo data** while installing Agent Chat.
- Ensure the user has legal fulfiller (sn_lg_ops.legal_fulfiller) role to use the Agent Chat.

Role required: admin

Procedure

1. Install Agent Chat along with the demo data.
   For more information, see Agent Chat and Advanced Work Assignment.
2. Configure the assignment rule to provide the criteria for routing the chat conversations to live agents in the Legal department.

   a. Navigate to **Advanced Work Assignment** > **Settings** > **Assignment Rules**.

   b. Open the base system assignment rule **Legal Chat Assignment Rule**.

   c. Update fields as required.
   For more information on the fields, see Configure agent assignment rules.

   d. Click **Update**.

3. Configure the work item queue and the associated assignment eligibility.

   a. Navigate to **Advanced Work Assignment** > **Settings** > **Queues**.

   b. Open the base system Queue **Legal Chat**.

   c. Update fields as required.
   For more information on the fields, see Create a work item queue.

   d. Click **Update**.

   e. In the Assignment Eligibility related list, open the base system record **Legal Department**.

   f. Update fields as required.
   For more information on the fields, see Define Assignment Eligibility.

Start a chat session through Legal Counsel Center Inbox

Accept an incoming chat request through Legal Counsel Center Inbox to start a chat session with the requester.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

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About this task

The live agent support enables a chat interaction between an employees and legal department users. For more information, see Live agent support for legal services.

Procedure

1. Navigate to **All** > **Legal Request** > **Legal Counsel Center**.
2. Click the inbox icon ( ).
3. Select **Available** from **Status** to make yourself ready to take incoming chat request.
   Employees on a Virtual Agent chat can use the **Contact Live Agent** option to connect.
4. When a chat comes through the chat queue, select **Accept**.
   A new interaction record is created and appears on the Legal Counsel Center.
5. From the Active Chat panel, interact with the employee who initiated the chat through the **Public Chat** tab or with another Legal department user for any information related to the current chat queries through the **Private Chat** tab.
   - To chat, enter a message and click the send icon ( ) or press the Enter key.

     Using response templates, you can insert predefined content in your chat conversations. Select the response template icon ( ) and find an appropriate response template. Copy and paste the template's content into the chat.

     Note: Only response templates configured for a chat channel are available to use. For more information see Response templates configured for chat channel.

   - To send an attachment, click the send attachment to chat icon ( ), select the file to attach, and click **Open**.
   - To transfer the chat to another queue, click the transfer to queue icon ( ) and select the queue.
   - To transfer the chat to another available agent, click the transfer to agent icon ( ) and select the agent name.

Related topics

Getting work from chats

Interaction records in Workspace

Legal Mobile

The ServiceNow® Legal Mobile application enables your employees to submit and track legal requests and lawyers to work on these requests on their mobile devices.

Employees can use the Now® Mobile app to do the following tasks:

- Submit and track legal requests
- Track the status of submitted requests

Lawyers can use the ServiceNow Agent app to do the following tasks:

- Triage unassigned requests and matters
- Approve or reject requests
- Create and manage matters

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- Create and assign tasks
- Create and manage artifacts
- View legal events and milestones

These apps run on the ServiceNow® mobile platform. You can download these mobile apps for the iOS platform from the Apple App Store or for the Android platform from the Google Play Store.

Default style for the Legal Mobile app

Legal Mobile app interfaces now match the ServiceNow AI Platform application. For more information on Next Experience in Mobile, see Next Experience in Mobile.

Install Legal Mobile

You can install the Legal Mobile application (sn_lg_mobile) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed. This app makes Legal Service Delivery applications available on Now Mobile and Mobile Agent mobile apps.

Before you begin

- Ensure that the Legal Mobile application and all of its associated store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Mobile application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Install the Legal Request Management (sn_lg_ops) application before you install Legal Mobile application (sn_lg_mobile).

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Mobile application (sn_lg_mobile) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Legal Mobile.
4. Select **Install**.

Download and log in to mobile apps to access legal services

Download the Now Mobile app to submit and track legal requests and the Mobile Agent mobile app to work on the submitted legal requests.

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Before you begin
Role required: none

About this task
After you install the Legal Mobile app in your instance, employees and lawyers can start using the legal services on their mobile device.

Procedure
1. Download the following mobile apps for the iOS platform from the Apple App Store or for the Android platform from the Google Play Store.
   - As a requester, download the Now Mobile app for submitting and tracking legal requests.

     For more information on using this mobile app, see Now Mobile app.
   - As a member of the legal department, download the Mobile Agent mobile app for working on legal requests.

     For more information on using this mobile app, see Agent mobile app.
2. Add your ServiceNow instance to the mobile app.
3. Log in to access the Legal Mobile apps functionality through the mobile device.
4. Open the Now Mobile or Mobile Agent mobile app and tap the plus icon (**+**).
5. Add your ServiceNow instance by entering the instance address.

   You do not need to include `service-now.com` at the end of the instance name.
6. **Optional:** In the **Enter nickname** field, enter an alias to quickly identify the instance.
7. Tap **Save and login**.
8. Log in to your instance.

Submit a legal request through Now Mobile

Submit a request to seek legal services from your organization's legal department.

Before you begin
Role required: sn_lg_ops.legal_user

Procedure
1. Open the Now Mobile app on your mobile device.
2. In the navigation bar, tap **Support**.
3. On the Support page, scroll down and tap **Legal** to view all available request categories.
4. Tap a request category.
5. Tap a legal service item for which you want to submit a request.
   If you are not sure which category to choose, tap the **General Legal Request** service item.
6. Fill in the fields.

   Note: Every legal service request has different set of fields based on the selected legal service item.
7. Tap **Submit**.

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A confirmation that your request has been submitted is displayed.

8. Tap **Close** to return to the list of service items.

Assign a legal request through Mobile Agent

As a legal group manager or a practice area lead, assign a legal request to a legal department's member to work on.

Before you begin
Role required: sn_lg_ops.legal_fulfiller

About this task
When an employee submits a legal request, it is automatically assigned to a group or user in the legal department based on the assignment rules configured for the intake form of the associated practice area. If the request is assigned to a legal group, any member from the group can triage the request themselves or assign it to another member of the group.

Procedure

1. In the Mobile Agent, navigate to the **Practice Area Work** list.
2. Tap **Unassigned Requests** to open the list of unassigned requests.
3. Tap a request item to assign it to a legal department's member.
4. In the **Details** tab, tap **Assign**.
5. In the **Assigned to** list, select the user to whom you want to assign the request.
6. Tap the submit icon ().

Result
The legal request is assigned to the selected user. The state of the legal request changes to Assigned.

Work on a legal request through Mobile Agent

As a member of the legal department, work on legal requests submitted by employees to resolve their issues or to answer their queries.

Before you begin
Role required: sn_lg_ops.legal_fulfiller

Procedure

1. Open the Mobile Agent app on your mobile.
2. In the navigation bar, tap **Legal**.
3. Open an assigned request you want to work on in any of the following ways:
   - In the global search bar, search for a request and tap on a request to open.
   - In the **Critical Requests Assigned to Me** list, tap on a request applet.
   - In the **My Work** list, tap on the **Assigned Requests** and then tap on a request.
4. Tap **Start Work** to start working on the legal request.

Result
The state of the legal request changes from Assigned to Work in Progress.

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What to do next

- Create and manage checklist to track what should be done to resolve the legal request.
- Add documents, videos, images.
- Promote the legal request to a legal matter. This option is available only if you have installed the Legal Matter Management application.
- Close the legal request when the request is resolved.

Manage a checklist for a legal request through Mobile Agent

Create and manage a checklist in an assigned legal request to ensure that you complete all the items necessary to fulfill the request.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. In the Mobile Agent, navigate to the **Assigned Requests** list.
2. Open a request for which you want to create the checklist.
3. In the **Checklist** tab, tap **Add Item** to add a new checklist item.
4. In the **Add Item** field, enter the checklist item description.
5. Tap the submit icon ().
6. Continue to add checklist items for the necessary actions to handle the request.
7. Check off completed items by tapping the corresponding item.

Promote a legal request to a legal matter through Mobile Agent

Promote a legal request to a legal matter when the request needs additional investigation and evaluation and substantial time to work on.

Before you begin

Ensure you have the Legal Matter Management app installed and the record producer type in the associated intake form is set to **Request and Matter**. For more information, see Add an intake form to a practice area.

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. In the Mobile Agent, navigate to the **Assigned Requests** list.
2. Tap the assigned request you want to work on.
3. In the **Details** tab, tap **Create Matter**.
4. In the Create Matter from Template screen, indicate whether to use a template to create a legal matter.
   - To create a legal matter record with predefined data, such as phases and tasks, select a template name from the **Matter template**.
   - To create a legal matter record without any predefined data, leave the **Matter template** field empty.
5. Tap the submit icon ().

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Result

- A legal matter is created with details copied from the legal request.
- If you selected a matter template, the matter has predefined phases, tasks, and attributes from the template.

Add collaborators to a legal matter through Mobile Agent

Add other users as collaborators so that they can view the details and progress of a legal matter.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

Procedure

1. In the Mobile Agent, navigate to the **Assigned Matters** list.
2. Tap the assigned matter to which you want to add a collaborator.
3. Tap the actions icon ( ) and select the **Add Collaborators** option.
4. Tap the **Add Collaborators** field and select the users to add as collaborators.
5. Tap the ok icon ( ).
6. Tap the submit icon ( ).

Add a phase in a legal matter through Mobile Agent

Add a phase to a legal matter to follow a structured approach to perform specific tasks to complete the matter.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

About this task

If you created a legal matter using a matter template, the predefined phases are available in the matter from the template. You can add more phases as required.

Procedure

1. In the Mobile Agent, navigate to the **Assigned Matters** list.
2. Tap an assigned matter in which you want to add a phase.
3. Tap the actions icon ( ) and select the **Create Phase** option.
4. In the **Enter Phase Name** field, enter a unique name for the phase.
5. In the **Enter Phase Order** field, enter the order in which the phase should be worked on.
6. Tap the submit icon ( ).

Result

A phase is added to the matter.

What to do next

Add tasks in the phase to manage activities in the legal matter. If the task has to be done by a different user, you can assign these tasks to that person.

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Add a task in a legal matter through Mobile Agent

Add a task in a legal matter or a phase of the matter that you or another user should perform to resolve the matter.

Before you begin

Role required: sn_lg_matter.matter_fulfiller

Procedure

1. In the Mobile Agent, navigate to the **Assigned Matters** list.
2. Tap an assigned matter.
3. In the **Others** tab, tap **Phase and Tasks**.
4. Open a phase in which you want to add a task.
5. Tap the actions icon ( ) and select the **Create Task** option.
6. On the form, fill in the fields.

Legal matter task form

Field	Description
Task Name	Unique name for the task.
Order	Order in which the task should be worked on.
Type	Type of the task: ○ Data collection ○ Risk and Mitigation
Due date	Date by which the task should be completed.
Short description	Short description to specify the expected activities and output involved in completing the task.

7. Tap the submit icon ( ).
8. Create a checklist to complete all the items necessary to fulfill the task.
   a. In the **Checklist** tab, tap **Add Item** to add a new checklist item.
   b. In the **Add Item** field, enter the checklist item description.
   c. Tap the submit icon ( ).
   d. Continue to add checklist items for the necessary actions to handle the task.
9. Assign the task to a user who can work on the task by tapping the **Assign** button.

Result

A legal matter task is created and is listed in the matter's Tasks tab. If the task was added in a phase record, then the task is also listed in the phase's Legal Matter Tasks tab.

Complete a legal matter task through Mobile Agent

When you finish working on an assigned matter task, you can mark the task as complete.

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Before you begin
Role required: sn_lg_ops.legal_user

Procedure

1. In the Mobile Agent, navigate to the **Assigned Tasks** list.
2. Tap an assigned task.
3. In the **Details** tab, tap **Mark as Complete**.

Result
The matter task is completed and its state updates to Review. It sent to the matter owner for approval.

Approve or reject a legal matter task through Mobile Agent

As a legal matter owner, you can review and approve or reject matter tasks that are marked as complete by the task owners.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

Procedure

1. In the Mobile Agent, navigate to the **Pending Approvals** list.
2. Tap an assigned task.
3. **Optional:** Review the task details and activities done by the task owner.
   a. Tap the task number on the **Approval for** field.
   b. Tap the back icon () to return to the task Pending Legal Matter Task Approval screen.
4. Approve or reject the task by tapping **Approve** or **Reject**.

Result

- If you approve the matter task, the task is closed. The state of the task updates to Closed Complete.
- If you reject the matter task, the task is opened again. The state of the task updates to Work in Progress. The task owner can work on the task again to fulfill the requirements of the task and mark it complete for approval.

Add an artifact to a legal matter through Mobile Agent

Add an artifact to a legal matter to upload and store documents, emails, and files related to the matter.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

About this task

Note: If the requester attached any files when submitting a request, a default artifact containing those files is created in the matter promoted from the request.

Procedure

1. In the Mobile Agent, navigate to the **Assigned Matters** list.
2. Tap an assigned matter to which you want to add an artifact.

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3. Tap the actions icon ( ) and select the **Create Artifact** option.
4. In the **Enter short description** field, enter a description for the artifact.
5. Tap the submit icon ( ).

Result
An artifact folder is created for the matter.

What to do next
Attach the matter-related files to the folder.

Attach files to a legal matter through Mobile Agent

Upload supporting documentation, such as documents, copies of email messages, images, or any other files into the artifact while you are working on a legal matter or matter task. You can also use these artifacts as a reference material to solve similar requests in future.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

Procedure
1. In the Mobile Agent, navigate to the **Assigned Matters** list.
2. Tap an assigned matter.
3. In the **Others** tab, tap **Artifacts**.
4. Open an artifact to which you want to attach a file.
5. Tap **Add Attachment** and select one of the options:
   - Take Photo
   - Record Video
   - Open Gallery
   - Attach File

   The file is attached and listed.
6. **Optional:** You can rename the file by tapping the edit icon ( ) and entering a new name.

   Note: If a file is no longer required for the legal matter, you can remove the file by tapping the delete icon ( ).

Close a legal matter through Mobile Agent

Close a legal matter assigned to you when you complete all activities for resolving it, or if you find that it doesn't need any further action.

Before you begin
Role required: sn_lg_matter.matter_fulfiller

Procedure
1. In the Mobile Agent, navigate to the **Assigned Matters** list.
2. Tap an assigned matter.
3. Tap **Close Complete**.

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4. In the Close Matter screen, enter comments in the **Comments** field describing the resolution of the matter or why it is being closed if not resolved.
5. To close related legal requests along with the parent request, tap **Close related requests** and select **Yes**.
   Only related legal requests that are in the Assigned or Work in Progress states are closed.
6. Tap **Submit**.

Result

- The legal matter is closed and its state updates to Closed Complete.
- If the parent legal request of the matter is not associated with any other open matters, the request is also closed.
- If you chose to close all related requests also, then they are also closed if they meet the following conditions:
  - The state of those requests is either Assigned or Work in Progress.
  - Those requests are not associated with any other open matters.
- Comments entered in the Close Matter screen are posted in all the open related requests.

Close a legal request through Mobile Agent

Close a legal request assigned to you when you've resolved it.

Before you begin

Role required: sn_lg_ops.legal_fulfiller

Procedure

1. In the Mobile Agent, navigate to the **Assigned Requests** list.
2. Tap the request item that you want to close.
3. Tap **Close Complete**.
4. Add your comments and tap **Submit**.
5. Tab **Yes** on the confirmation message.

Result

The legal request is closed and the state changes to Close Complete.

Legal Counsel Center

The Legal Counsel Center is the next experience Workspace that enables the legal department members to work with actionable widgets to quickly categorize, prioritize, and efficiently resolve legal issues.

It is a redesigned and restructured version of the Legal Counsel Center Classic Workspace experience built on a configurable UI Builder version. For more information on UI Builder, see UI Builder

Important: Legal Counsel Center Classic is now deprecated and no longer supported or available for new activation. For enhanced workspace experience, use Legal Counsel Center. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Review the following details to understand the key offerings and differences between these applications:

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Comparison between Legal Counsel Center and Legal Counsel Center Classic

Functionality and application availability	Legal Counsel Center	Legal Counsel Center Classic
Functionality comparison		
Leverage UI Builder • Edit component properties • Utilize variants and audiences • Next Experience UI Branding • Styling Configuration	✓	✗
AI search	✓	✗
Integration with the Legal Tracker application for Outside counsel engagement	✓	✗
Legal applications comparison		
Legal Request Management	✓	✓
Legal Matter Management	✓	✓
Contract Management Pro for Legal Service Delivery	✓	✗
Legal Simple Intellectual Property	✓	✗
Legal Conflict of Interest	✓	✓
Legal Content Review	✓	✓
Legal Digital Forensics	✓	✓
Legal Investigations	✓	✓
Legal Simple Contracts	✓	✓
Legal Simple Privacy	✓	✓
Legal Stock Preclearance	✓	✓

Exploring Legal Counsel Center

Legal Counsel Center enables legal department members to categorize, prioritize, and efficiently address legal issues.

Legal Counsel Center requires the installation of the following applications:

- Legal Request Management (sn_lg_ops)
- Legal Counsel Center (sn_lg_cf_workspace)

Install Legal Counsel Center to get the Next Experience. Review the Legal Counsel Center application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

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Note: Install Legal Counsel Center to get the Next Experience and then review and uninstall the Legal Counsel Center Classic. For more information, see Uninstall an application.

Legal Counsel Center benefits

Features and their benefits

Feature	Benefit
User action widgets and metrics	As a fulfiller, access an overview of new, assigned, draft, and work-in-progress requests and matters, and pending approvals. You can also see the trends for open and closed requests, matters, and matter tasks, and a consolidated list of all your selected links.
Multi-tab interface	Track and address multiple requests concurrently by navigating between multiple open records.
Real-time activity feed	View activities related to legal requests and legal matters and notifications in real time.
Intuitive search and filter capabilities	Search for relevant information across multiple sources such as knowledge bases, open and resolved legal requests and legal matters, and catalog items in Counsel Assist.
Compose and send emails	Compose and send emails from a legal request, legal matter, or matter task record forms through Legal Counsel Center. You can also compose emails and save them as drafts to send later.

Legal Counsel Center home page

The Legal Counsel Center home page enables you to work with actionable widgets that helps in quickly categorize, prioritize, and efficiently resolve legal issues.

The Legal Counsel Center is the next experience Workspace for the legal fulfillers. It acts as a starting point and gives a snapshot of what is important to the fulfiller. It enables the members of the legal department to categorize, prioritize, and efficiently address legal issues. On the Legal Counsel Center home page dashboard, get a quick overview of the legal requests, legal matters, matter tasks, and pending approvals that the fulfiller is working on and that are newly created or in draft state for your assignment group, which you can assign to yourself and address. The graphical representation of the various metrics and widget data helps you monitor your workload, focus on high-priority items, and easily navigate across your responsibilities. You can view the delegated items that others have delegated to you. Additionally, you can also view trends in open and closed requests and matters over a period of time. Finally, you can use the Your links widget as a bookmark to easily access important and frequently used internal and external URLs within the Workspace.

Important:

- The Matters and Matter tasks widgets are visible if the Legal Matter Management plugin is installed.
- To use interview templates, you must first install the Interview Templates plugin (com.sn_interview_templates) and enable the Requested RCA of Interview Templates for Legal Counsel Center application and Legal Matter Management scope. For more information, see Interview Management for Employee Relations.

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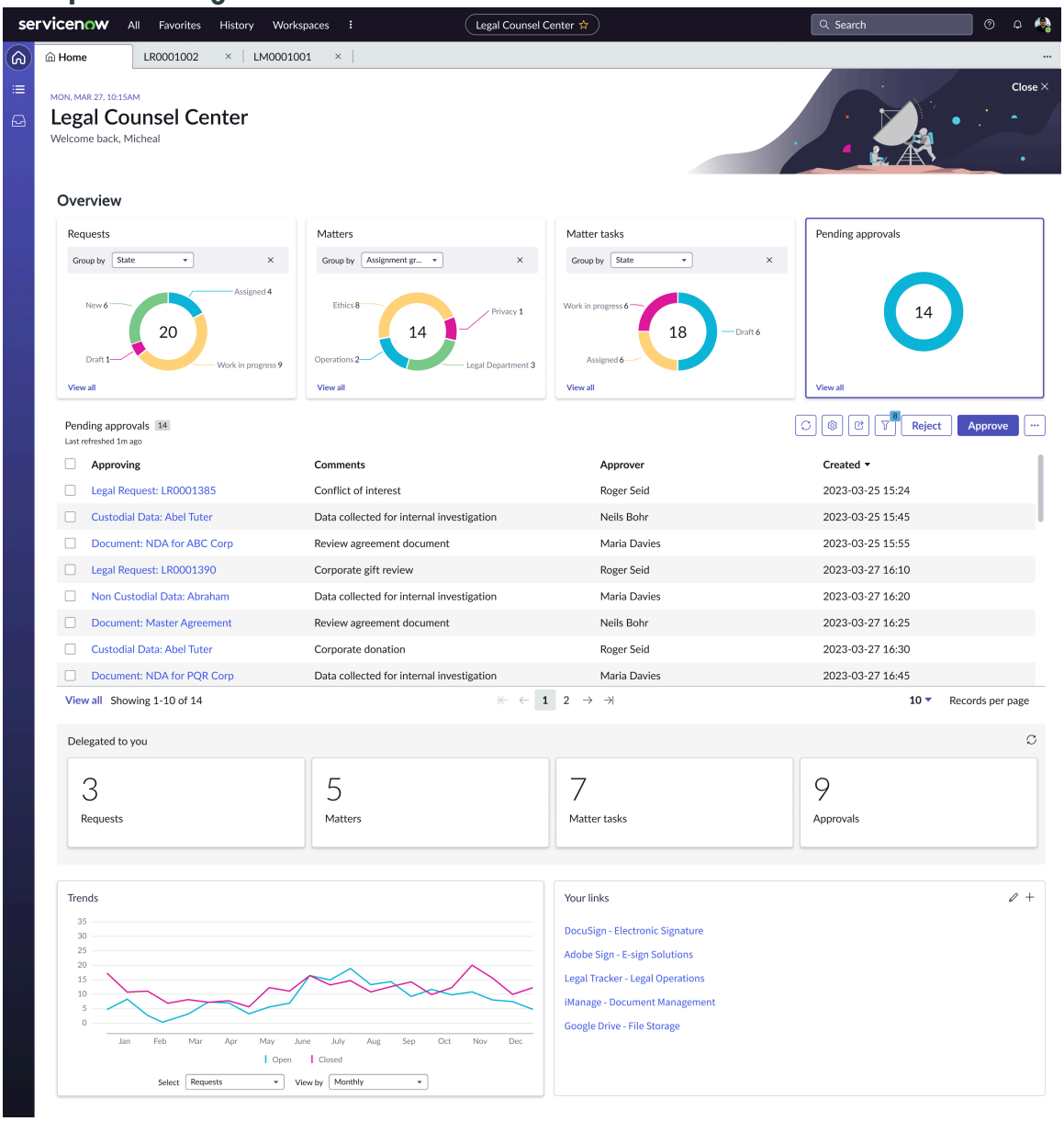
The following is an example of the Legal Counsel Center landing page.

Example of the Legal Counsel Center



Legal Counsel Center Classic

Legal Counsel Center Classic enables legal department members to categorize, prioritize, and efficiently address legal issues.

Important: Legal Counsel Center Classic is now deprecated and no longer supported or available for new activation. For enhanced workspace experience, use Legal Counsel Center. For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Legal Counsel Center Classic is available if you've installed the following apps:

- Legal Request Management (sn_lg_ops)
- Legal Counsel Center Classic (sn_lg_workspace)
- Legal Counsel Center Components (sn_lg_ws_comps)

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Legal Counsel Center Classic is built using the ServiceNow® Agent Workspace. You can customize Legal Counsel Center Classic as per your departmental needs.

The ServiceNow® Legal Counsel Center Components application enhances the workspace experience for the Legal Counsel Center Classic by decoupling the components in the Legal Counsel Center Classic to offer better performance.

Review the Legal Counsel Center Classic application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Key features

Legal Counsel Center Classic includes the following features:

Department and user level metrics

Get an overview of new, assigned, unassigned, and high-priority requests. Review and act on upcoming milestones and pending approvals.

Multi-tab interface

Track and address multiple requests concurrently by navigating between multiple open records.

Real-time activity feed

View activities related to legal requests and legal matters and notifications in real time.

Intuitive search and filter capabilities

Search for relevant information across multiple sources such as knowledge bases, open and resolved legal requests and legal matters, and catalog items in Counsel Assist.

Compose and send emails

Compose and send emails from within the Legal Counsel Center Classic from a legal request, legal matter, or matter task record forms. You can also compose emails and save them as drafts for sending them later.

Legal Counsel Center Classic users

Users with the sn_lg_matter.matter_fulfiller and sn_lg_ops.request_fulfiller roles can access Legal Counsel Center Classic and is personalized for different roles.

Accessing Legal Counsel Center Classic

To open Legal Counsel Center Classic, navigate to **All** > **Legal Request** > **Legal Counsel Center Classic**.

Legal Counsel Center Classic landing page

On the Legal Counsel Center Classic landing page, get a quick overview of the legal requests, legal matters, matter tasks, and upcoming milestones. The various metrics and widget data help you and your team in monitoring your workload, focusing on high-priority items, and easily navigating across your responsibilities.

Note: The widgets and data displayed in the widgets are determined by your role.

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Configure Legal Counsel Center Workspace

Configure the Legal Counsel Center Workspace to customize the dashboard and interface according to the needs of the fulfillers so that they can categorize, prioritize, and efficiently address legal issues.

Configuration overview

To configure and customize Legal Counsel Center Workspace along with the Home page, List page, and the Analytics Center page, get familiarized with the UI Builder basics. For more information, see UI Builder.

To work on the UI Builder, navigate to **UI Builder** from **All**. Then search and select **Legal Counsel Center** to configure. To configure the home page, select **Landing page default**. For more information on how to configure the list and analytics center pages, see Working in UI Builder.

You must also understand additional Configurable Workspace components to configure Legal Counsel Center. For more information, see Configuring Configurable Workspace.

Install Legal Counsel Center Workspace

You can install the Legal Counsel Center application (sn_lg_cf_workspace) if you have the admin role. The application installs ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.
- Review the Legal Counsel Center application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed:

- Plugins
  - Legal Request Management plugin
  - Legal Counsel Center plugin
- Store applications
- Roles

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Legal Counsel Center application (sn_lg_cf_workspace) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

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In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Enable or disable notifications

Enable or disable Legal Counsel Center notifications to subscribe to items that interest you and unsubscribe from information that does not interest you and is not mandatory.

Before you begin

You must have the following applications installed:

- Legal Request Management
- Legal Counsel Center

Role required: admin

About this task

For information about the available notifications, see Legal Counsel Center notifications.

Procedure

1. Navigate to **All** > **Self-Service** > **My Notification Preferences**.
2. Select **Advanced Preferences** in the **General** tab of the Notifications window.
3. Enter `Legal` in the Search notifications field.
4. Enable or disable any legal matters or legal request notifications.

Result

The notification is enabled or disabled for the user. For more information on the notifications, see Legal Counsel Center notifications.

Configure AI Search for Legal Counsel Center

Configure your AI Search implementation for Legal Counsel Center Workspace.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Search and select **Legal Counsel Center** from the Experiences section of the UI Builder homepage.
3. Select **Settings** to open the experience settings.
4. Search and select the **Search source** drop-down in the Global search section.
5. Select **Legal Counsel Center AI Search** from the drop-down.
6. Select **Save**.
7. Go back to the homepage and navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
8. The **AI Search Indexed Sources** page is displayed.

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Search for the following indexed sources:

- Legal Requests
- Legal Matters
- Legal Matter Task

9. Select each of them to open.
10. Select **Index All Tables** for each of them.
    This process generates the indexes for all the tables. You need not perform any task on the opened page and you can close the page.

Result

The AI Search for Legal Counsel Center is configured and is available for consumption in the Legal Counsel Center Workspace.

Legal Counsel Center reference

Reference topics provide additional information about components installed and the notifications available in Legal Counsel Center.

Roles installed with Legal Counsel Center

User roles are installed with activation of the Legal Counsel Center Workspace plugin.

Roles

Roles installed with Legal Counsel Center

Legal role title	Description	Contains Workspace ro
Legal Counsel Center Workspace administrator [sn_lg_cf_workspace.admin]	Grants permissions to all administrators to change the Legal Counsel Center Workspace for Legal Request Management to fit into the business or user requirements. • The chat_admin role administers the chat tables. • The uxframework_designer role has write access to UX page element records for designing UIs. • The agent_workspace_user role enables you to perform interaction agent and interaction queue transfers. • The sn_agent_recommend.recommendation_admin role manages fulfiller assist recommendation configurations. • The interaction_admin role enables you to administer the Interaction Management system. • The workspace_list_admin role enables you to manage Workspace lists and categories.	Workspace administra • Chat admin [chat_a • UX framework desig [uxframework_desig • Legal Counsel Cent [sn_lg_cf_workspac • Fulfiller recommend [sn_agent_recomm _admin] • Interaction admin [i • Workspace list adm [workspace_list_adr • UI action admin [ui_ • UI Builder admin [ui • UX framework user • Similarity Analyzer [sn_intel_analyzer.s _analyzer_admin] • Form admin [form_a • Personalize form [pe • UI notification admi

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Roles installed with Legal Counsel Center (continued)

Legal role title	Description	Contains Workspace ro
	• The ui_action_admin role enables you to manage UI actions. • The ui_builder_admin role provides permission to use the UI Builder APIs so you can create, update, read, and delete UX pages. • The uxframework_user role enables you to browse and select from the library of UX component records so they can set a component reference field on any accessible table. • The sn_intel_analyzer.similarity _analyzer_admin role enables you to administer the Similarity Analyzer. The Similarity Analyzer defines patterns and trends that can help you resolve a record. • The form_admin role manages forms, form sections, and section elements. • The personalize_form role enables you to personalize forms. • The ui_notification_admin role enables you to configure notification triggers.	
Legal Counsel Center Workspace user [sn_lg_cf_workspace.legal_workspace_user]	Provides users with access to the Legal Counsel Center Workspace.	Workspace user [work

User roles

Any user with sn_lg_ops.legal_fulfiller and sn_lg_ops.request_fulfiller roles can access Legal Counsel Center. You can customize Legal Counsel Center for different roles depending on assignment group, practice areas, and other access credentials. For more information on customization, see Configure Legal Counsel Center Workspace.

Accessing Legal Counsel Center

To access Legal Counsel Center, navigate to **Workspaces** > **Legal Counsel Center**. Alternatively, you can access the Legal Counsel Center by navigating to **All** > **Legal Request** > **Legal Counsel Center**.

Legal Counsel Center notifications

Legal Counsel Center notifications enable users to subscribe to items that interest them and unsubscribe from messages that do not interest them and are not mandatory.

Legal Counsel Center provides notifications for legal matters and for legal requests.

For information about how to enable or disable notifications, see Enable or disable notifications.

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Legal Requests notifications

Except for New Comments in Legal Request, the default state of all notifications in Legal Requests is Enabled.

Legal Requests notification details

Name	Recipient	Title
New Legal Request Created	Practice Area Leads, Assignment group manager and event creator if in the above roles	${Request} is created
Legal Request Assigned	Assigned to	${Request} is assigned to you
Legal Request Updated	Requested for, Opened by	${Request} is updated
New Comments in Legal Request	Assigned to, Practice Area Lead, Watchlist users with fulfiller role, Additional assignee list	${Request}: Comment added
Legal Request Resubmit	Requested for, Opened by	${Request} is resubmitted
Legal Request Reopen	Assigned to, Opened by	${Request} is reopened
Additional Interviewer Added	Current interviewer added	${Matter}: Interviewer added
Send for Wet Signature	Signer	${contract_request.short_description}
Send Wet Signed Contract	Created by	${contract_request.short_description}
Signer Declined to Sign	Contract request.Requested for	${contract_request.number}: Signature declined
Update Inactive COI Record	User(created by)	${legal_request} is deactivated
COI Approval	User(created by)	${legal_request} is approved
Stock Preclearance Request Approved	Requested for	${legal_request.number} is approved
Reminder to COI Requestor	User(created by)	${number} is expiring soon
Stock Preclearance Request Rejected	Requested for	${number} is rejected
Document Ready	Requested for	${number}: Document is ready

Legal Matters notifications

The default state of all Legal Matters notifications is Enabled.

Legal Matters notification details

Name	Recipient	Title
New Legal Matter Created	Practice Area Lead and event creator if in the practice area lead role	${Matter} is created

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Legal Matters notification details (continued)

Name	Recipient	Title
Legal Matter Assigned	Assigned to	${Request} is assigned to you
Legal Matter Updated	Created by, Requested for, Matter owner	${Matter} is updated
Legal Matter Reopen	Assigned to, Practice Area Lead, Watchlist users with fulfiller role and event creator if in the above roles	$(short description)
New Comments in Legal Matter	Assigned to, Practice Area Lead, Watchlist users with fulfiller role, additional assignee list	${Matter}: Comment added
Legal Matter Closed or Cancelled	Practice Area Lead, Watchlist users with fulfiller role and event creator if in the above roles	${Matter} is closed or cancelled
Legal Matter Task Assigned	Assigned to	${Request} is assigned to you
Legal Matter Task Rejected by Approver	Assigned to	${task} is rejected
Adhoc Approval Approve	Assigned to and event creator if assigned to	${Request} is approved
Adhoc Approval Reject	Assigned to and event creator if assigned to	${Request} is rejected

External Legal Service Center

The ServiceNow® External Legal Service Center application enables external users like customers, partners, and the public to directly contact your organization for legal information. They can ask for clarifications, submit concerns, and get the legal information they need. This access fosters trust and shows organization's commitment to accountability and legal compliance.

Get started

Explore



Learn about the features and benefits of External Legal Service Center

Setting up



Install and configure External Legal Service Center

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Use	Reference
	
Use External Legal Service Center to submit, view and track requests for legal services	Get details about components, such as roles that are installed

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

ServiceNow Community

Connect with other Legal Service Delivery users at ServiceNow Community.

Customer Success Center

Find useful resources related to your role and explore best practices at the Impact

Known Error Portal

Learn more about specific known errors, along with workarounds if any, from the Known Error Portal

Exploring External Legal Service Center

Learn more about External Legal Service Center with a sample workflow and review the benefits it can provide for different users in your organization.

External Legal Service Center overview

The ServiceNow® External Legal Service Center application enables external users like customers, partners, and the public to directly contact your organization for legal information. They can ask for clarifications, submit concerns, and get the legal information they need. This access fosters trust and shows organization's commitment to accountability and legal compliance.

External Legal Service Center users

Users

User	Description
Legal Administrator or Legal Configurator	Configure External Legal Service Center and record producers for submission of requests for legal services.
External Legal Service Center external user	Submit, view, and track requests for legal services.

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External Legal Service Center workflow

1. Legal administrator or legal configurator configures record producers to be available to external users.
2. External user takes the following actions for registering with the External Legal Service Center.
   a. Access the External Legal Service Center.
   b. Submits a request for registration.
   c. Configures password and completes the registration process.
3. External user takes the following actions to submit a request for legal services.
   a. Logs in to the External Legal Service Center.
   b. Selects the request type from the catalog.
   c. Submits the request.
4. Assigned group request works on the request.
5. External user views and tracks the request from the External Legal Service Center.

External Legal Service Center benefits

External Legal Service Center benefits

Benefit	Feature	Users
Improved Transparency: Maintains transparency in the organization's operations and fosters trust by addressing legal requests from external users.	Addressing legal queries submitted by external users.	External users
Enhanced Customer Service: Provides a direct and formal channel for addressing legal concerns and queries.	Configure record producers to be available in External Legal Service Center.	Legal configurator
Risk Management: Helps in identifying and mitigating potential legal risks.	Addressing legal queries submitted by external users.	Legal team
Compliance Assurance: Having a system for external legal queries helps promote that the organization conforms with relevant laws and regulations.	Addressing legal queries submitted by external users.	Legal team

What to explore next

To learn more about configuring and using External Legal Service Center, see:

- Configuring up External Legal Service Center
- Using External Legal Service Center
- External Legal Service Center reference

Configuring up External Legal Service Center

Install External Legal Service Center, set up the requirements for enabling external users to submit request for legal services.

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Configuration overview

1. Install External Legal Service Center

   Install and activate External Legal Service Center.

2. Enable record producer for external user

   Enable the record producer to be available in the External Legal Service Center catalog.

3. Enable save as draft option for record producer

   Enable the **Save as Draft** option for a record producer.

4. Configure the password reset process for External Legal Service Center

   The Password Reset application enables an end user to reset or change a password using a self-service process.

Install External Legal Service Center

You can activate the External Legal Service Center plugin (sn_lg_ext_portal) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

External Legal Service Center requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

Required plugins and roles are installed with External Legal Service Center.

For more information, see External Legal Service Center reference.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the External Legal Service Center plugin (sn_lg_ext_portal) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

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Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Enable record producer for external user

Enable the record producer to be available in the External Legal Service Center catalog.

Before you begin

Role required: sn_lg_ops.legal_admin

About this task

You can create record producers for external users to submit requests through the External Legal Service Center. For more information, see Managing record producers for legal services.

Procedure

1. Navigate to **All** > **Legal Administration** > **Record Producers**.
2. Select the record producer from the list.
3. Enable the record producer for external users.
   a. Select Available For related list.
   b. Select **Edit**.
   c. Select **Users with sn_lg_ext_portal.ext_user**.
   d. Select Add icon ( ).
   Users with sn_lg_ext_portal.ext_user is moved to the Available For List.
   e. Select **Save**.
4. Remove external user role from not available list.
   a. Select Not Available For related list.
   b. Select **Edit**.
   c. Select SNC External from the Not Available for list.
   d. Select Remove icon ( ).
5. Select **Update** to save the record producer.
6. For the record producer to be available in the catalog, configure ACLs for tables referenced from the record producers.
   For more information, see Configure an ACL rule.

Result

The record producer is available for the external users in the External Legal Service Center catalog.

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What to do next

If you want **Save as Draft** option to be enabled for a record producer, enable the system property *glide.sc.enable.save_as_draft.portal.elp*. For more information, see Enable save as draft option for record producer.

Enable save as draft option for record producer

Enable the **Save as Draft** option for a record producer.

Before you begin

Role required: sn_lg_ext_portal.ext_config

Procedure

1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `glide.sc.enable.save_as_draft.portal.elp` property.
   For more information on the system property, see Property installed with External Legal Service Center.
3. Select the property.
4. If you aren't able to edit the property in the current application scope, select the word **here** in the message at the top of the page.
5. Update the **Value** field to `true`.
6. Select **Update**.

Configure the password reset process for External Legal Service Center

The Password Reset application enables an end user to reset or change a password using a self-service process.

External users can reset their password on forgetting it. For more information on the password reset process configuration, see Configuring Password Reset.

Using External Legal Service Center

The ServiceNow® External Legal Service Center application enables external users to register themselves, submit, view, and track their requests for legal services.

You can also add attachments while submitting a request.

Note: You cannot add attachments to a request when you have external storage configured.

Overview of submitting a request for a legal service

To register yourself and submit a request for legal services, perform the following actions.

1. Register with External Legal Service Center

   Register yourself for External Legal Service Center to enable you to submit requests.

2. Create request from External Legal Service Center

   Create a request for a legal service from the External Legal Service Center. You can submit a request or save it in draft to submit later.

3. Edit requests in External Legal Service Center

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Edit requests that saved are as draft in External Legal Service Center.

4. View and track requests submitted in External Legal Service Center

   View and track requests submitted for a legal service from the External Legal Service Center.

Register with External Legal Service Center

To submit a request for legal services, register yourself with the External Legal Service Center.

Before you begin

Role required: sn_lg_ext_portal.ext_user

Procedure

1. Navigate to the External Legal Service Center home page by accessing your instance URL and adding a /elp suffix.
   For example, https://example.com/elp.
2. Select **Register**.
3. On the Account sign up form, fill in the fields.
   First name, Last name, and Email are required fields.
4. Select **Sign Up**.
   A verification email is sent to the email address that you provided.
5. Select **Verify Account** from the verification email.
   - After your details have been verified, the self-registration request is approved.
   - On approval of the self-registration request, you receive an email to set the password.
6. In the set password email, select **Set a new password** to set a new password for your account.
7. Set a password for your account.
   Your self-registration is complete. You can now log in to the External Legal Service Center.

Create request from External Legal Service Center

Create a request for a legal service from the External Legal Service Center. You can submit a request or save it in draft to submit later.

Before you begin

Role required: sn_lg_ext_portal.ext_user

About this task

Verify you have registered with External Legal Service Center before submitting a request for a legal service. For more information, see Register with External Legal Service Center.

Procedure

1. Navigate to the External Legal Service Center home page by accessing your instance URL and adding a /elp suffix.
   For example, https://example.com/elp.
2. Log in with your user name and password.
3. From the Legal Services catalog, select the request type to be submitted.
4. Add Summary description.
5. **Optional:** Add Description.
6. **Optional:** Add attachments.

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a. Select Add icon ( ).

b. Add attachments using any of the following methods.

- Select **Choose a file** and select the file to be attached.
- Drag files from your local computer into your browser window to attach them to the current record.
- From your local computer, copy the files that you want to attach. Click inside the Documents box and paste the files.

7. Submit the request or save it as a draft.

Action	Steps
Save as draft	Select **Save as Draft**.
Submit the request	Select **Submit**. **Note:** On submitting a request you receive an email notification with the request details.

Edit requests in External Legal Service Center

Edit requests that are saved as draft in External Legal Service Center.

Before you begin

You can only edit requests that are saved as draft. Once you submit a request, you cannot edit it.
Role required: sn_lg_ext_portal.ext_user

Procedure

1. Navigate to the External Legal Service Center home page by accessing your instance URL and adding a /elp suffix.
   For example, https://example.com/elp.
2. Log in with your user name and password.
3. Navigate to **My Requests** from the header.
4. Navigate to the Drafts tab.
5. Select a request.
6. Select **Update Draft**.
7. Edit the Summary description or Description.
8. Work on the attachments.

Action	Steps
Add attachments	**a.** Select Add icon ( ). **b.** You can add attachments by selecting, dragging, or pasting a file.
Rename attachments	**a.** Select Edit file name icon ( ). **b.** Edit the file name.

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Action	Steps
Delete attachments	**a.** Select Delete icon (✖). **b.** Select **OK** on the delete attachment confirmation.

9. Select **Update Draft** to save the file.
10. **Optional:** Select **Submit** if you want to submit the request.

View and track requests submitted in External Legal Service Center

View and track requests submitted for a legal service from the External Legal Service Center.

Before you begin

Role required: sn_lg_ext_portal.ext_user

About this task

After you submit a request, the assigned group starts working on it. You receive an email when a comment is added to the request. The request is marked as complete once it is resolved.

Procedure

1. Navigate to the External Legal Service Center home page by accessing your instance URL and adding a /elp suffix.
   For example, https://example.com/elp.
2. Log in with your user name and password.
3. Navigate to **My Requests** from the header.
4. Navigate to the Submitted request tab to see your requests.
   A list of submitted requests will be displayed with the State.
5. Select a request to view the details.
   - In the Activity tab, view the comments.
   - In the Attachment tab, view the attached files.
   - In the Request Details, view the summary and description.
6. Post a comment in the request.
   a. Navigate to the Activity tab.
   b. Enter a comment in the Type your message here field.
   c. Select **Post**.
7. Cancel the request if it is no longer needed.
   a. Select **Actions** > **Cancel request**.
   b. Enter the reason for cancellation.
   c. Select **Confirm cancellation**.
   The request is canceled and you will receive an email notification for the cancellation.

External Legal Service Center reference

Several types of components are installed with installation of the External Legal Service Center, including user roles.

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Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with External Legal Service Centre

Role title [name]	Description	Contains roles
External Legal Service Center administrator [sn_lg_ext_portal.ext_admin]	Provides administrative permissions for External Legal Service Centre application and full access to underlying data.	sn_lg_ext_portal.ext_config
External Legal Service Center Configurator [sn_lg_ext_portal.ext_config]	Provides access to configure data for External Legal Service Centre application.	• sn_lg_ops.legal_user • sn_lg_ext_portal.ext_user
External Legal Service Center User [sn_lg_ext_portal.ext_user]	Provides user access to External Legal Service Centre and perform actions.	None

Components installed with External Legal Service Center

Several types of components are installed with installation of the External Legal Service Center, including user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with External Legal Service Center

Role title [name]	Description	Contains roles
External Legal Service Center administrator [sn_lg_ext_portal.ext_admin]	Provides administrative permissions for External Legal Service Centre application and full access to underlying data.	sn_lg_ext_portal.ext_config
External Legal Service Center Configurator [sn_lg_ext_portal.ext_config]	Provides access to configure data for External Legal Service Centre application.	• sn_lg_ops.legal_user • sn_lg_ext_portal.ext_user
External Legal Service Center User [sn_lg_ext_portal.ext_user]	Provides user access to External Legal Service Centre and perform actions.	None

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Property installed with External Legal Service Center

Property that you can use to enable the **Save as Draft** option for a record producer in External Legal Service Center.

These properties are available for External Legal Service Center.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for External Legal Service Center

Property	Description
glide.sc.enable.save_as_draft.portal.elp	Enable "Save as Draft" option for a record producer. • Type: true| false • Default value: true • Other possible values: false • Location: System Property [sys_properties] table • Learn more:

Exploring Legal Service Portal

The Legal Service Portal is a self-service portal for employees to submit legal requests, monitor their progress, read legal knowledge base articles, and get help using virtual agent chat support.

The Legal Service Portal is installed with the installation of the Legal Request Management app.

Navigate to **All** > **Legal Request** > **Legal Service Portal** to access Legal Service Portal.

Legal Service Portal

Use the Legal Service Portal to do the following tasks:

- Submit legal requests by selecting from a catalog item from the Legal Service Catalog.
- Track the status of your submitted requests.
- Find and read through the top-rated legal knowledge base articles to find information.
- Chat with a virtual agent to submit and track legal requests and read legal knowledge base articles.

With ServiceNow® AI Search enabled, you get better search results through predictions and Natural Language Processing (NLP). For more information, see Enable and configure AI Search in Legal Service Portal.

Security in Legal Service Delivery

Legal Service Delivery provides security through various ServiceNow AI Platform security features such as Restricted Caller Access, Encryption Support, and Edge Encryption.

Restricted caller access for Legal Service Delivery

Restricted caller access (RCA) privilege settings define cross-scope access to an application, application resource (for example, access control role, business rule, UI action, script include), event, or to allow or deny requests for access. Using RCA, the administrators can track cross-

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scope applications or scripts that request access to a Legal Service Delivery application, application resources, or events and secure sensitive information in scoped tables and script includes.

The **Scoped Application Restricted Caller Access [com.glide.scope.access.restricted_caller]** plugin is activated during the Legal Service Delivery application installation or upgrade.

When you define cross-scope access to an application resource, use the following settings:

Caller tracking

This setting is recommended for the development stage. Access is allowed to the tables and script includes, but tracked in the Restricted Caller Access table. Access information can be viewed from **Application Restricted Caller Access**.

Caller restriction

This setting is recommended for the production phase after development is complete.

For more information, refer to Define cross-scope access to an application resource.

Encryption for Legal Service Delivery

Legal Service Delivery provides encryption to secure sensitive information.

Encryption prevents unauthorized users viewing specific fields. To encrypt fields in Legal Service Delivery, Column Level Encryption is activated by default and provides role-based encryption functions.

For more information on encryption, see Field Encryption.

Edge Encryption for Legal Service Delivery

ServiceNow® Edge Encryption ™ encrypts sensitive data on your company premises before sending it over the internet to your ServiceNow instance (encrypted in flight), where it remains encrypted at rest.

For more information, see Understanding Edge Encryption.

Because edge encryption is enabled on a proxy server on your side of the network, there is significant planning, network administration and management, and setup required. For more information, see Planning for Edge Encryption.

To install edge encryption, see Edge Encryption installation.

To configure edge encryption, see Edge Encryption configuration.

You can encrypt columns (fields) or attachments associated with tables. See Encrypt fields using encryption configurations.

Note: There are limitations when using edge encryption. See Edge Encryption limitations.

Scoped knowledge bases

To protect knowledge bases containing sensitive articles, use a scoped knowledge base. Even system administrators and knowledge administrators can't administer scoped knowledge bases unless explicitly authorized through user criteria.

For example, say you have a knowledge article with sensitive payroll information that should be seen only by the Payroll department and not by a system administrator or knowledge

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administrator. You could create a knowledge article with the sensitive information in a scoped knowledge base within the Human Resources: Core application.

Users with the admin role of an application and the knowledge_admin role can administer a scoped knowledge base. You control access to knowledge bases of an application with application administration enabled, such as HR, through the ACLs of the knowledge tables in the application instead of global ACLs. To define access to a scoped knowledge base, specify appropriate user criteria for users, including system administrators and knowledge administrators.

Note: For Scope Master tables to derive scope and execute scoped ACLS, you must set the *glide.enforce_security_scope.<scope_name>* system property to true.

You can't modify the scope of existing knowledge bases. They remain in the global scope. However, you can create a scoped knowledge base to protect sensitive knowledge articles.

To create a scoped knowledge base for an application, in addition to the knowledge_admin or admin role, you must have access to view and select that application in the application picker (see Application picker). For example, before you create a knowledge base in the Human Resources: Core application, you must select the Human Resources: Core application in the application picker, and then create the knowledge base. Then, when you create a knowledge base, on the Knowledge base form, the application scope of the knowledge base is set in the **Application** field.

Related topics

Create a knowledge base

Application administration

Control access at the knowledge base level through user criteria

Analytics and Reporting Solutions for Legal Service Delivery

Analytics and Reporting Solutions contain prepackaged Performance Analytics content for use with other ServiceNow AI Platform products. This Analytics and Reporting Solution enables data-driven decision making through insights and trends derived from legal services and operations data.

Required roles

The following roles and tasks are associated with this Solution:

- ServiceNow AI Platform administrator (admin): Install and activate this Analytics and Reporting Solution and make any necessary changes to system properties.
- Performance Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.

The Next Experience user interface (UI) Legal Executive Dashboard is available and can be accessed from **Workspaces** > **Platform Analytics Workspace** > **Dashboards** > **All** > **Legal Executive Dashboard**.

Activate the Analytics and Reporting Solution for Legal Service Delivery

Activate the content pack ServiceNow Store application for the Analytics and Reporting Solution.

Before you begin

Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a non-

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production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.

Review the Performance Analytics Content Pack for Legal Service Delivery application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Applications** > **ServiceNow Store**.
2. Browse for Performance Analytics Content Pack for Legal Service Delivery and verify that you have the necessary valid entitlements.

   You need a HI account and permission to request applications for the instances under consideration. The HI account and the instance need to be part of the same company. For more information, see Install a ServiceNow Product on the ServiceNow Store.
3. Search for `Performance Analytics Content Pack for Legal Service Delivery`.
4. Install the application.

Legal Executive dashboard

With the Legal Executive dashboard, you can get an insight into how your team and business are performing for resolving Legal service requests.

From a single place, you can track the status of legal requests and matters, analyze trends, and drill down into the details. You can view the details for top request categories, requests by user locations, practice area, and requesting department, SLA compliance of legal requests and legal matters, the average number of requests handled per attorney, and average time to close legal requests and legal matters over time.

Note: The classic version of Legal Executive Dashboard has been deprecated. If you open a saved URL to access the classic Legal Executive Dashboard, the Next Experience dashboard is automatically displayed. If you have customized the classic version, review and migrate your customizations to the Next Experience Legal Executive Dashboard.

For reports and metrics on legal requests and legal matters and the trend analysis, see Legal Operations dashboard.

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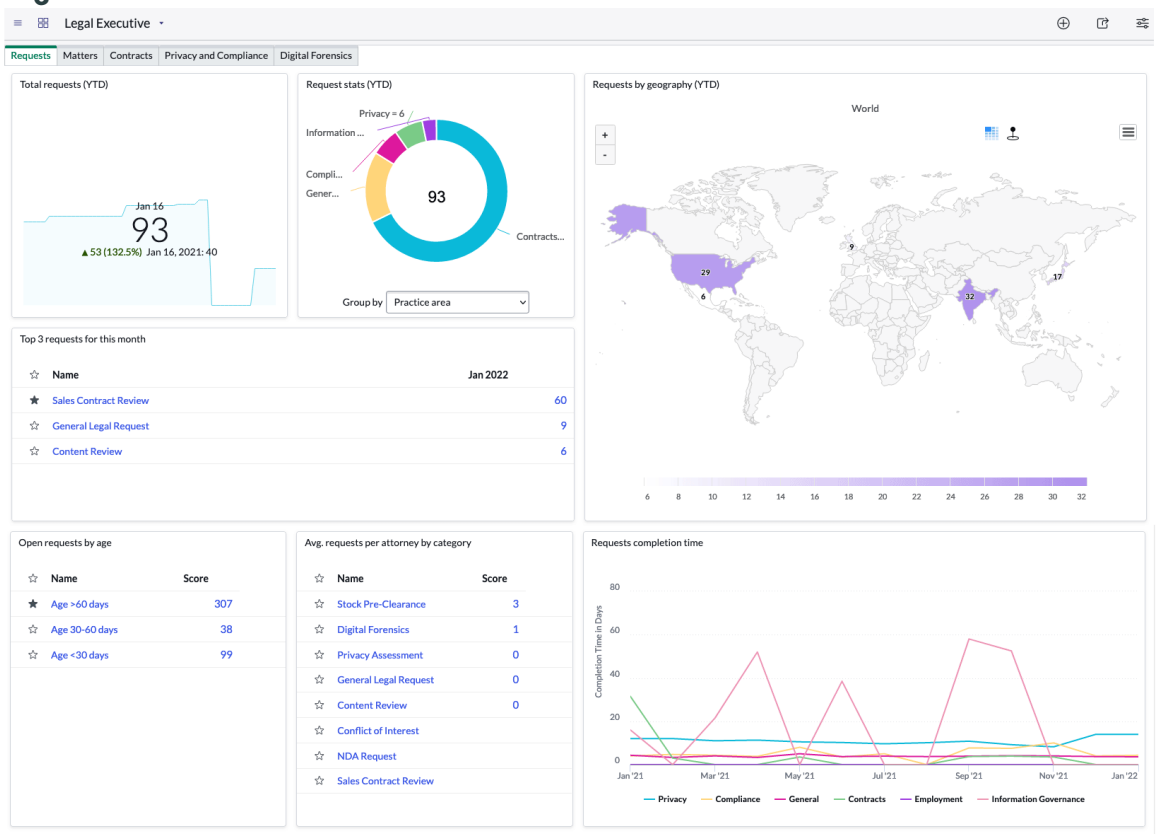
Legal Executive dashboard



Important: The tabs specific to practice areas are available on the Legal Executive dashboard depending on whether the corresponding application is installed. For example, the **Contracts** tab is available when you have installed the Legal Simple Contracts application. Also, you can add new tabs in the dashboard to view reports related to practice areas created by you.

Required ServiceNow AI Platform roles

- sn_lg_ops.legal_report_viewer, required to see the dashboard widgets and data.
- sn_lg_ops.legal_report_publisher, required to edit the dashboard.

Access the Legal Executive dashboard

To open the dashboard, navigate to **All** > **Legal Request** > **Legal Dashboards** and click **Legal Executive**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Use cases for different personas

User	Dashboard use
General counsel	Make data-driven decisions through insights into legal operations with the following metrics:

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Use cases for different personas (continued)

User	Dashboard use

	• Total number of legal requests and legal matters for the current year with breakdown by geography, practice area, and requesting department
	• Backlog of open legal requests and legal matters with aging
	• Average time to resolve different types of legal requests and legal matters
	• Practice area-specific metrics:
	  ○ Contracts: Open backlog by deal size and aging; average time to close contract requests
	  ○ Privacy and Compliance: SLA Compliance; average time to close different request types such as Conflict of Interest and Privacy Assessment
	  ○ Digital Forensics: Breakdown of requested activities; backlog of requested activities with aging; average time to close by activities

Practice area lead	Make data-driven decisions through insights into legal operations with the following metrics: • Average number of legal requests and legal matters handled per attorney • SLA compliance of legal requests and legal matters • Top practice area getting the highest number of requests • Average time to resolve different types of legal requests and legal matters

Indicator groups

Indicators to get an insight into team and business performance

Indicator group name	Description	Indicators
Average requests per attorney	Average number of legal requests handled by each attorney where breakdowns are Practice area and Category.	• Conflict of Interest • Content Review

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Indicators to get an insight into team and business performance (continued)

Indicator group name	Description	Indicators
		• Digital Forensics • General Legal Request • NDA Request • Privacy Assessment • Sales Contract Review • Stock Pre-Clearance • Third Party Contract Review
Average matters per attorney	Average number of legal matters handled by each attorney in a practice area.	• Digital Forensics • General Legal Request • Privacy Assessment • Subpoena
Digital Forensics Open Backlog	Number of days that the activities have been open for digital forensics requests created this year to date. An activity's age is calculated from the time the legal matter task associated with the activity was created to the present day.	• Collect • Preserve • Review • Present
Legal Contracts: Avg. Age	Average age of Contract requests of different deal sizes.	• <$500 K • $500 K - $1M • $1M - $5M • $5M

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Indicators to get an insight into team and business performance (continued)

Indicator group name	Description	Indicators
Open Backlog: Legal Requests	Number of open legal requests, as well as their age, which indicates how long they've been open.	• Age 30–60 days • Age <30 days • Age >60 days
Open Backlog: Legal Matters	Number of open legal matters, as well as their age, which indicates how long they've been open.	• Age 30–60 days • Age <30 days • Age >60 days
Privacy and Compliance Open Backlog	Age of open privacy and compliance requests that have been submitted. The age is calculated from the time the legal requests were created to the present day.	• Conflict of Interest • Privacy Impact Assessment • Stock Preclearance

Indicators

$1M - $5M

Average age of Contract requests with a deal size of $1 million to $5 million.

$500 K - $1M

Average age of Contract requests with a deal size of $500 K to $1 million.

$5M

Average age of Contract requests with a deal size of $5 million or more.

<$500 K

Average age of Contract requests with a deal size of $500 K or less.

Age 30–60 days (applies to legal requests)

Number of open legal requests created in the last 30–60 days.

Age 30–60 days (applies to legal matters)

Number of open legal matters created in the last 30–60 days.

Age <30 days (applies to legal requests)

Number of open legal requests created in the last 30 days.

Age <30 days (applies to legal matters)

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Number of open legal matters created in the last 30 days.

Age >60 days (applies to legal requests)

Number of open legal requests created more than 60 days ago.

Age >60 days (applies to legal matters)

Number of open legal matters created more than 60 days ago.

Average activity completion time for digital forensics

Monthly trend of average completion time of various digital forensics activities by phase. The completion time is calculated from the time an activity task is created and until it is closed.

Average matter completion time per practice area

Monthly trend of average completion time of legal matters by practice area. The completion time is calculated from the time a legal matter is created and until it is closed.

Average matters per Attorney

Average number of legal matters handled by each attorney where breakdowns are Practice area and Category.

Average request completion time for contracts

Monthly trend of the average completion time of contract requests by different contract types.

Average request completion time for privacy and compliance

Monthly trend of the average completion time of various privacy and compliance requests.

Average request completion time per practice area

Monthly trend of average completion time of legal requests by practice area.

Average requests per Attorney

Average number of legal requests handled by each attorney where breakdowns are Practice area and Category.

Collect

Number of days that the Collect activity has been open for digital forensics requests created this year to date. The activity's age is calculated from the time the legal matter task associated with the activity was created to the present day.

Conflict of Interest

Age of open Conflict of Interest requests that have been submitted. The age is calculated from the time the legal requests were created to the present day.

Count of members in Legal group

Number of users in a legal user group.

MoM trend of Legal Matters

Monthly trend of number of legal matters created.

MoM trend of Legal Requests

Monthly trend of number of legal requests created.

Open Backlog Contract Requests

Number of open Contract requests, broken down by deal size, that have been created so far this year, as well as their age.

Present

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Number of days that the Present activity has been open for digital forensics requests created this year to date. The activity's age is calculated from the time the legal matter task associated with the activity was created to the present day.

Preserve

Number of days that the Preserve activity has been open for digital forensics requests created this year to date. The activity's age is calculated from the time the legal matter task associated with the activity was created to the present day.

Privacy Impact Assessment

Age of open Privacy Assessment requests that have been submitted. The age is calculated from the time the legal requests were created to the present day.

Request Completed within SLA

Number of Privacy and Compliance requests closed on the day within SLA.

Review

Number of days that the Review activity has been open for digital forensics requests created this year to date. The activity's age is calculated from the time the legal matter task associated with the activity was created to the present day.

Stock Preclearance

Age of open Stock Preclearance requests that have been submitted. The age is calculated from the time the legal requests were created to the present day.

Total Completed Legal Requests with SLA

Number of legal requests closed on the day within SLA.

YTD Digital Forensics Request

Number of Digital Forensics requests that have been created so far this year.

YTD Legal contracts

Number of Contract requests that have been created so far this year.

YTD Legal matters

Number of legal matters that have been created so far this year.

YTD Legal Privacy and Compliance Requests

Number of Privacy and Compliance requests that have been created so far this year.

YTD Legal requests

Number of legal requests that have been created so far this year.

% of privacy and compliance requests that met SLA

Percentage of privacy and compliance requests that were responded to within the defined SLA this year to date. The score is calculated according to this formula: [Requests Completed within SLA]/[Total Completed Legal Requests with SLA] * 100

Conflict of Interest

Average number of legal matters in the Conflict of Interest category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = Conflict of Interest]/[Count of members in Legal group > Legal group = Legal - Ethics & Compliance]

Content Review

Average number of legal requests in the Content Review category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category

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= Content Review]/[Count of members in Legal group > Legal group = Legal Department]

Digital Forensics (applies to legal requests)

Average number of legal requests in the Digital Forensics category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = Digital Forensics]/[Count of members in Legal group > Legal group = Legal - Digital Forensics]

Digital Forensics (applies to legal matters)

Average number of legal matters in the Digital Forensics category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average matters per Attorney > Category = Digital Forensics]/[Count of members in Legal group > Legal group = Legal - Digital Forensics]

General Legal Request (applies to legal requests)

Average number of legal requests in the General Legal Request category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = General Legal Request]/[Count of members in Legal group > Legal group = Legal Department]

General Legal Request (applies to legal matters)

Average number of legal matters in the General Legal Request category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average matters per Attorney > Category = General Legal Request]/[Count of members in Legal group > Legal group = Legal Department]

NDA Request

Average number of legal requests in the Non-disclosure Agreement category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = NDA Request]/[Count of members in Legal group > Legal group = Legal Contracts Support]

Privacy Assessment

Average number of legal requests in the Privacy Assessment category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = Privacy Assessment]/[Count of members in Legal group > Legal group = Legal Privacy]

Privacy Assessment

Average number of legal matters in the Privacy Assessment category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average matters per Attorney > Category = Privacy Assessment]/[Count of members in Legal group > Legal group = Legal Privacy]

Sales Contract Review

Average number of legal requests in the Sales Contract Review category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = Sales Contract Review]/[Count of members in Legal group > Legal group = Legal Sales Contract]

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Stock Pre-clearance

Average number of legal requests in the Stock Preclearance category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = Stock Pre-Clearance]/[Count of members in Legal group > Legal group = Legal Stock Approvers]

Subpoena

Average number of legal matters in the Subpoena category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average matters per Attorney > Category = Subpoena]/[Count of members in Legal group > Legal group = Legal Employment]

Third Party Contract Review

Average number of legal requests in the Third Party Contract Review category handled by each attorney in the respective assignment group this year to date. The score is calculated according to this formula: [Average requests per Attorney > Category = Third Party Contract]/[Count of members in Legal group > Legal group = Legal Contracts Support]

Breakdowns

Common to Legal Service Delivery applications

- Group
- Assigned To (for all users in the system)
- Assigned To (for users in the Legal Privacy and Compliance groups)
- Category

Legal Request Management

- Age
- Assigned To
- Category
- Practice area
- Priority
- State
- Subcategory

Legal Matter Management

- Matter Owner
- Priority
- State (for legal matters)
- State (for legal matter tasks)

Legal Simple Contracts

- Assigned To
- Category

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- Deal Size
- Subcategory

Legal Digital Forensics

- Assigned To
- Requested Activities
- Subcategory

Indicator visualizations

Indicator and its type

Title	Type	Source indicator/ indicator group	Description
Requests tab			
Total requests (YTD)	Score 	YTD Legal requests	Compares the number of requests received this year to date to the same period of the previous year.
Top 3 requests for this month	Scorecard 	MoM trend of Legal Requests	Provides insight into the top active areas where the internal business is seeking legal assistance.
Open requests by age	List 	Open Backlog: Legal Requests	Provides the number of open requests along with their age, which indicates how long the requests have been open.
Request stats (YTD)	Donut 	Legal Request [sn_lg_ops_request]	Number of legal requests received this year to date grouped by practice area or the requesting department.
Avg. requests per attorney by category	List 	Average requests per attorney	Displays the average number of legal requests handled by each attorney in a practice area.
Requests completion time	Line 	Average request completion time per practice area	Displays the monthly trend of average completion time of legal requests by practice area. The completion time is calculated from the time a legal request is created and until it is closed.
Matters tab			
Total matters (YTD)	Score 	YTD Legal matters	Compares the number of legal matters received this year to date to the same period of the previous year.
Top 3 matters for this month	Scorecard 	MoM trend of Legal Matters	Provides insights into the legal team's most active areas of work.

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Indicator and its type (continued)

Title	Type	Source indicator/ indicator group	Description
Open matters by age	List 	Open Backlog: Legal Matters	Provides the number of open matters along with their age, which indicates how long matters have been open.
Matter stats (YTD)	Donut 	Legal Matter [sn_lg_matter_matter]	Number of legal matters received this year to date grouped by practice area or the requesting department.
Avg. matters per attorney by category	List 	Average matters per attorney	Average number of legal matters handled by each attorney in a practice area.
Matters completion time	Line 	Average matter completion time per practice area	Displays the monthly trend of average completion time of legal matters by practice area. The completion time is calculated from the time a legal matter is created and until it is closed.
Contracts tab			
Total Contract requests (YTD)	Score 	YTD Legal contracts	Compares the number of Contract requests received this year to date to the same period of the previous year.
Open Contract requests by deal size	Donut 	Open Backlog Contract Requests	Displays how long the Contract requests have been open by deal size.
Open Contract requests by deal size and age	List 	Legal Contracts: Avg. Age	Displays the average age of Contract requests of different deal sizes.
Contract requests by contract type (YTD)	Donut 	Legal Request [sn_lg_ops_request]	Number of Contract requests created so far this year.
Contract completion time	Line 	Average request completion time for contracts	Displays the monthly trend of average completion time of contract requests by different contract types. The completion time is calculated from the time a Contract request is created and until it is closed.
Privacy and Compliance tab			
Total Privacy and Compliance requests (YTD)	Score 	YTD Legal Privacy and Compliance Requests	Compares the number of privacy and compliance requests received this year to date to the same period of the previous year.

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Indicator and its type (continued)

Title	Type	Source indicator/ indicator group	Description
Open requests by category and age	List 	Privacy and Compliance Open Backlog	Displays how long the privacy and compliance requests have been open by different request types.
Privacy and Compliance requests by category (YTD)	Donut 	Legal Request [sn_lg_ops_request]	Number of open legal requests in Privacy or Compliance practice areas.
% Requests responded within SLA (YTD)	Score 	% of privacy and compliance requests that met SLA	Displays the percentage of privacy and compliance requests that were completed within the defined SLA.
Request completion time	Line 	Average request completion time for privacy and compliance	Displays the monthly trend of average completion time of various privacy and compliance requests. The completion time is calculated from the time a request is assigned to an attorney until it is closed.
Digital Forensics tab			
Total Digital Forensics requests (YTD)	Score 	YTD Digital Forensics Request	Compares the number of digital forensics requests received this year to date to the same period of the previous year.
Open activities by age	List 	Digital Forensics Open Backlog	Displays how long the digital forensics requests' activities have been open. An activity's age is calculated from the time the legal matter task associated with the activity was created to the present day.
Activities completion time	Line 	Average activity completion time for digital forensics	Displays the monthly trend of average completion time of various digital forensics activities. The completion time is calculated from the time an activity task is created and until it is closed.

Data visualizations

Reports displayed on the dashboard

Title	Type	Source table	Description
Requests by geography (YTD)	Map 	Legal Request [sn_lg_ops_request]	Number of legal requests received from users in various regions so far this year is displayed on a map.
Requested activities (YTD)	Donut	Legal Matter Task [sn_lg_matter_task]	Number of activities requested for the

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Reports displayed on the dashboard (continued)

Title	Type	Source table	Description
			Digital Forensics requests so far this year.
Open requests by category	Donut 	Legal Request [sn_lg_ops_request]	Number of open legal requests in Stock Preclearance, Conflict of Interest, or Privacy Assessment categories.
Open activities	Donut 	Legal Matter Task [sn_lg_matter_task]	Number of open activities for all Digital Forensics requests as of date.
Matters by geography (YTD)	Map 	Legal Matter [sn_lg_matter_matter]	Number of legal matters created from legal fulfillers in various regions so far this year is displayed on a map.

Legal Operations dashboard

The Legal Operations dashboard provides comprehensive reports to the legal department. The dashboard uses Performance Analytics to provide reports and metrics on legal requests and legal matters.

General Counsel and the practice area leads can use the Performance Analytics Legal Executive dashboard to gain insights into legal operations, performance, and trends with real-time reporting.

Note: The classic version of the Legal Operations dashboard has been deprecated. If you open a saved URL to access the classic Legal Executive Dashboard, the Next Experience dashboard is automatically displayed. If you have customized the classic version, review and migrate your customizations to the Next Experience Legal Operations dashboard.

Access the Legal Operations dashboard

To open the dashboard, navigate to **All** > **Legal Request** > **Legal Dashboards** and click **Legal Operations**.

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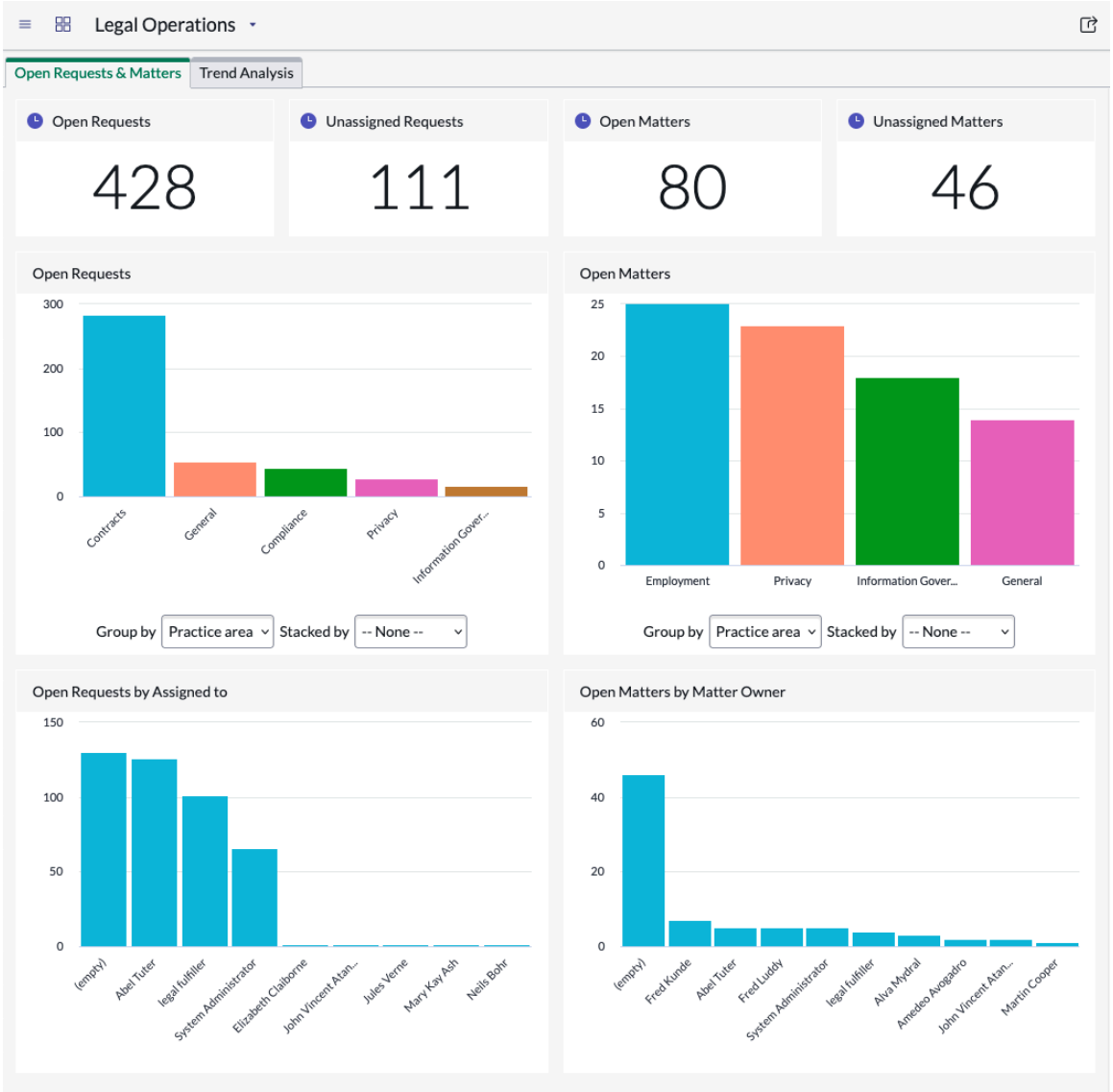
Open Requests & Matters tab



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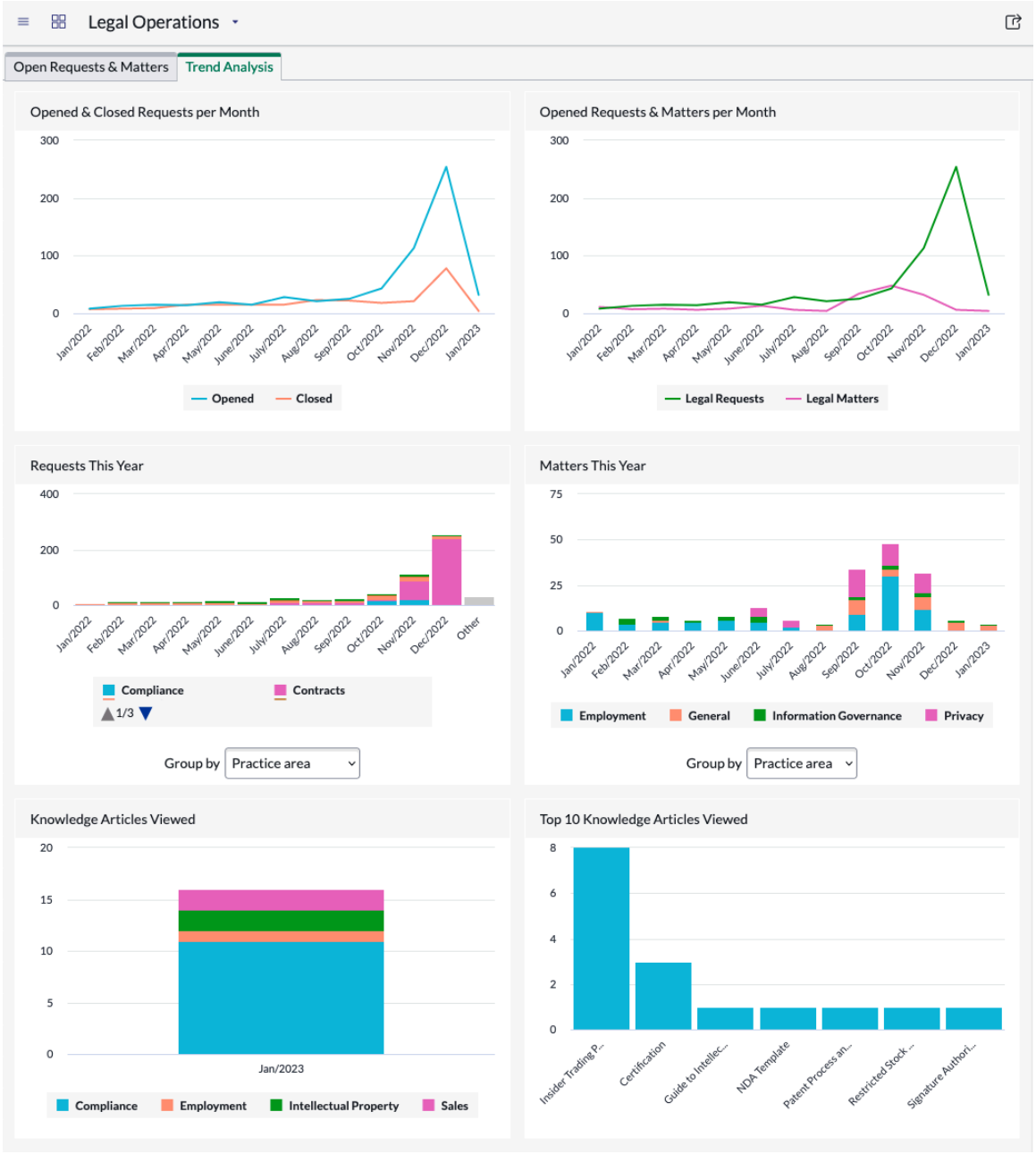
Trend Analysis tab



End user and roles

Roles required to view and publish reports

End user and goal	Required role
Legal Report Viewer: Has visibility in count, state, assigned and unassigned, trend over specific time for legal requests and legal matters.	sn_lg_ops.legal_report_viewer
Legal Report Publisher: Has access to create, modify, and publish reports for legal request and legal matter.	sn_lg_ops.legal_report_publisher

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Data visualizations

Reports displayed on the dashboard

Title	Type	Description
Open Requests & Matters tab		
Open Requests	Single score	Number of legal requests that are not in any of these states: Closed Complete, Closed Incomplete, or Cancelled.
Unassigned Requests	Single score	Number of legal requests that are in the New state and not yet assigned to anyone.
Open Matters	Single score	Number of legal matters that are not in any of these states: Closed Complete, or Cancelled.
Unassigned Matters	Single score	Number of legal matters that are in the New state and not yet assigned to anyone.
Open Requests	Bar	Number of open legal requests. The requests in this report are grouped by practice area. Use the **Group by** and **Stacked By** lists to change the data representation of the chart.
Open Matters	Bar	Number of open legal matters. The matters in this report are grouped by practice area. Use the **Group by** and **Stacked By** lists to change the data representation of the chart.
Open Requests by Assigned to	Bar	Number of open legal requests that are in any of these states: New, Assigned, Work In Progress. The requests in this report are grouped by assigned users.
Open Matters by Matter Owner	Bar	Number of open legal matters that are in any of these states: New, Assigned, Work In Progress. The matters in this report are grouped by matter owners.
Trend Analysis tab		

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Reports displayed on the dashboard (continued)

Title	Type	Description
Opened & Closed Request per Month	Time series line	Monthly trend of closed legal requests over opened requests that were created in the current year.
Opened Requests & Matters per Month	Time series line	Monthly trend of legal requests and legal matters.
Requests This Year	Stacked column	Legal requests created in the current year. The requests in this report are grouped by practice areas.
Matters This Year	Stacked column	Legal matters created in the current year. The matters in this report are grouped by practice areas.
Knowledge Articles Viewed	Stacked column	Number of knowledge articles created in the current year that have been viewed. The articles in this report are grouped by article categories.
Top 10 Knowledge Articles Viewed	Bar	Top 10 knowledge articles viewed the most number of times. The articles in this report are grouped by the short description of the articles.

Workflows in Legal Service Delivery

The Legal Request Management application installs automated workflows for electronic signature and external storage. These workflows enable support for multiple integrations and accounts at the same time.

These workflows available in Legal Service Delivery are built using Flow Designer.

Note: All workflows for Legal Service Delivery applications are read-only by default.

Electronic signature workflows

The following predefined workflows for electronic signing of documents are available:

Core electronic signature workflows

The following core electronic signature workflows are installed with Legal Request Management

- Electronic Signature Core - DocuSign
- Electronic Signature Core – AdobeSign

NDA Signature workflows

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The following electronic signature workflows are installed with Legal Simple Contracts and are used for sending the Non-disclosure Agreement (NDA) documents for electronic signature.

- NDA Electronic Signature (Dynamic Flow)
- NDA Electronic Signature - DocuSign
- NDA Electronic Signature - AdobeSign

External storage workflows

The Legal External Storage Core flow for storing documents in external storage systems is installed with Legal Request Management. The following subflows are installed within the core workflow for each external storage system integration.

- Legal External Storage Core - Microsoft OneDrive
- Legal External Storage Core – Google Drive
- Legal External Storage Core – Box
- Legal External Storage Core – Microsoft SharePoint
- Legal External Storage Core – iManage

Note: These external storage subflows can be used with another workflow to store documents in external storage.

The Legal Contracts External Storage Flow is the core external storage workflow installed with Legal Simple Contracts.

Domain separation and Legal Service Delivery

Domain separation is supported for applications in Legal Service Delivery. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Legal Service Delivery overview

Legal Service Delivery includes the following applications:

- Legal Request Management
- Legal Matter Management

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- Gifts and Entertainment Compliance
- Legal Conflict of Interest
- Legal Digital Forensics
- Legal Invention Disclosure
- Legal Investigations
- Legal Simple Contracts
- Legal Simple Privacy
- Legal Stock Preclearance

All tables installed with the following applications can be domain-separated:

- Legal Request Management
- Legal Matter Management
- Gifts and Entertainment Compliance
- Legal Conflict of Interest
- Legal Digital Forensics
- Legal Invention Disclosure
- Legal Investigations
- Legal Simple Contracts
- Legal Simple Privacy
- Legal Stock Preclearance

How domain separation works in Legal Service Delivery

- If an employee submits a legal service request, the request can be assigned to legal department users who are in the same domain as the employee.
- Lawyers or paralegal staff can work only on those legal requests that have been created within the domain that they belong to.

Related topics

Domain separation for service providers

Legal Service Delivery reference

Reference topics provide additional information about Legal Service Delivery.

Legal Service Delivery glossary

Learn about the terms and concepts used in Legal Service Delivery.

Glossary terms are grouped alphabetically.

A | C | D | G | I | L | N | O | R | S | V | W

A

automated workflows

Step-by-step digital processes that make legal work faster and reduce manual effort.

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C

centralized database

A single repository where all potential conflict disclosures and legal records are stored for easy monitoring.

D

digital transformation

Replacing old, slow ways of working with digital tools to make legal work faster and easier.

digital forensics

The process of collecting and analyzing electronic data for legal investigations, such as emails or files, to uncover important information.

G

generative AI

A technology that uses large language model (LLM) to generate text, summaries, and other content.

I

intellectual property

Ideas and creations like inventions, designs, or artworks that are legally protected from being copied or used without permission.

Integration

A process by which the ServiceNow platform can be made to work with a third-party application or web service.

L

legal service delivery (LSD)

A system in ServiceNow that helps legal teams handle their work more efficiently by using digital tools instead of paperwork.

legal request management

A feature that lets employees submit legal help requests online and ensures they reach the right team.

legal matter management

A tool that helps legal teams keep track of important legal cases without using spreadsheets.

legal counsel center

A special workspace where legal teams can track and manage requests from employees.

legal practice apps

Pre-built tools in ServiceNow that help legal teams work faster and more efficiently.

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legal knowledge management

A system that organizes and stores legal information so teams can quickly find what they need.

legal contracts

A tool that helps legal teams manage contracts quickly and safely.

legal investigations

A system that allows employees to report ethical or legal concerns, even anonymously.

legal operations

The everyday tasks and processes that help a legal team run efficiently.

legal digital forensics

A tool that assists in managing requests for data discovery during investigations or legal proceedings.

legal mobile

A mobile application that enables employees and legal professionals to submit, track, and manage legal requests on their mobile devices.

legal requests

Inquiries or demands for legal assistance or information submitted by employees or departments within an organization.

litigation

The process of taking legal action or resolving disputes through the court system.

legal compliance

Ensuring that an organization's actions and policies follow all applicable laws and regulations.

N

now mobile

A mobile app that lets employees and legal teams handle legal tasks on their phones.

O

omnichannel experience

The ability to connect with legal teams through different methods like email, chat, or a website, all working smoothly together.

R

reporting and dashboards

A feature that shows reports and charts to help teams track their work.

S

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self-service portal

An online platform where employees can independently access services and information, such as submitting legal requests.

ServiceNow AI Platform[var.now-plat]

The main system that supports the tools that help businesses run smoothly.

V

virtual agent

A conversational bot platform that provides user assistance through conversations in a messaging interface.

W

workflow

Defined sequence of steps automating processes in Sales and Order Management.

Contract Management Pro

The ServiceNow® Contract Management Pro solution enables you to set up contract document templates, clauses, and clause variations, and to initiate contract and amendment requests. It also supports Now Assist driven contract analysis and metadata extraction, e-signatures, wet signatures, and external storage systems.

You can use the actionable widgets on Contract Workspace to categorize, prioritize, and efficiently work on contract requests.

With Contracts Dashboard, you can analyze the various contract request trends and also get insights into the volume of contract requests that are handled by your team.

The following video provides an overview of Contract Management Pro.

https://player.vimeo.com/video/1121338208?h=19fe79daf7&badge=0&autopause=0&player_id=0&app_id=58479

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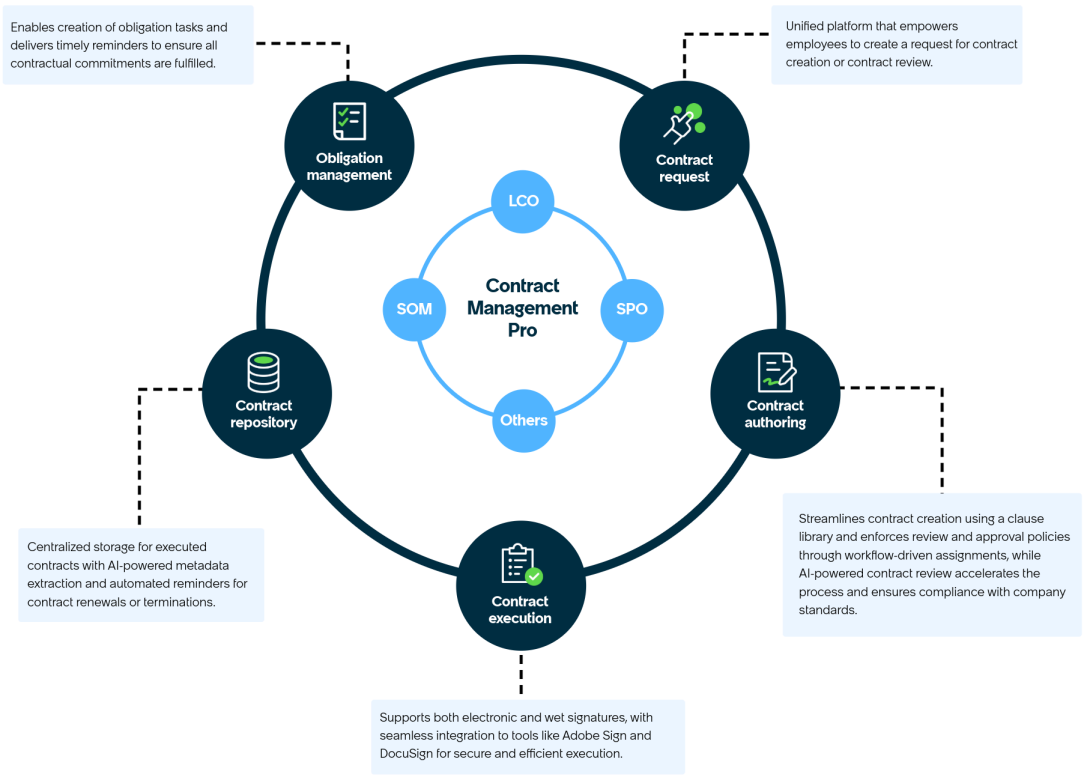
Contract Management Pro



Get started

Explore	Configure	Use
Learn about the features and benefits of Contract Management Pro	Install and configure Contract Management Pro	Use Contract Management Pro to submit contract requests, manage document templates and clauses, request signatures, and use external storage

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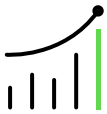
Manage	Reference	Analytics and Reporting
		
Manage contract templates and contracts	Get details about components, such as roles, tables, plugins, and store applications, that are installed	Coordinate work and improve processes with preconfigured dashboards

Now Assist in Contract Management

Use Now Assist in Contract Management to enhance user productivity using generative AI

Helpful resources

Some ServiceNow resources that can provide you with helpful information are:

Release Notes

Learn more about what's new and changed. See the .

ServiceNow Community

Connect with other Contract Management Pro users at ServiceNow Community.

Customer Success Center

Find useful resources related to your role and explore best practices at the Customer Success Center.

ServiceNow University

Access real-time courses, self-paced training, and career resources from ServiceNow University.

Known Error Portal

Learn more about specific known errors, along with workarounds if any, from the Known Error Portal.

Exploring Contract Management Pro

Learn more about the Contract Management Pro application through a sample workflow and review the benefits that it can provide.

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Contract Management Pro overview

Contract Management Pro solution enables you to set up contract document templates, clauses, and clause variations, and to initiate contract and amendment requests. It also supports Now Assist driven contract analysis and metadata extraction, e-signatures, wet signatures, and external storage systems.

Contract Management Pro users

Users

User	Description
Contracts Core administrator	Contract administrator manages contract records, user roles, and system configurations.
Contracts Core configurator	Contract configurator manages the configurations related to Contract Management Pro. They configure contract templates, external systems, and configuration rules.
Contracts Core fulfiller	Contract fulfiller initiates actions while fulfilling an assigned contract execution. This includes tasks such as creating revisions, adding signers, and canceling signer assignments.
Contracts Core user	Contract users initiate and track contract and amendment requests.
Contract reviewer	Contract reviewers review contract documents, track review tasks, and use clause library to add appropriate clauses.
Contract report viewer	Contract report viewer views contract reports, analyse contract trends, and support data-driven decision making.
Contract report publisher	Contract report publisher publishes reports on Contracts Dashboard.
Obligation user	Obligation user submits obligation request.
Obligation fulfiller	Obligation fulfiller initiates actions while fulfilling an obligation. This includes tasks like create obligations, approve, reject, or cancel obligation tasks.
Obligation administrator	Provides administrative access to Obligation management and underlying data.

Self-served contract request workflow

The following image provides an overview of the self-served contract requests.

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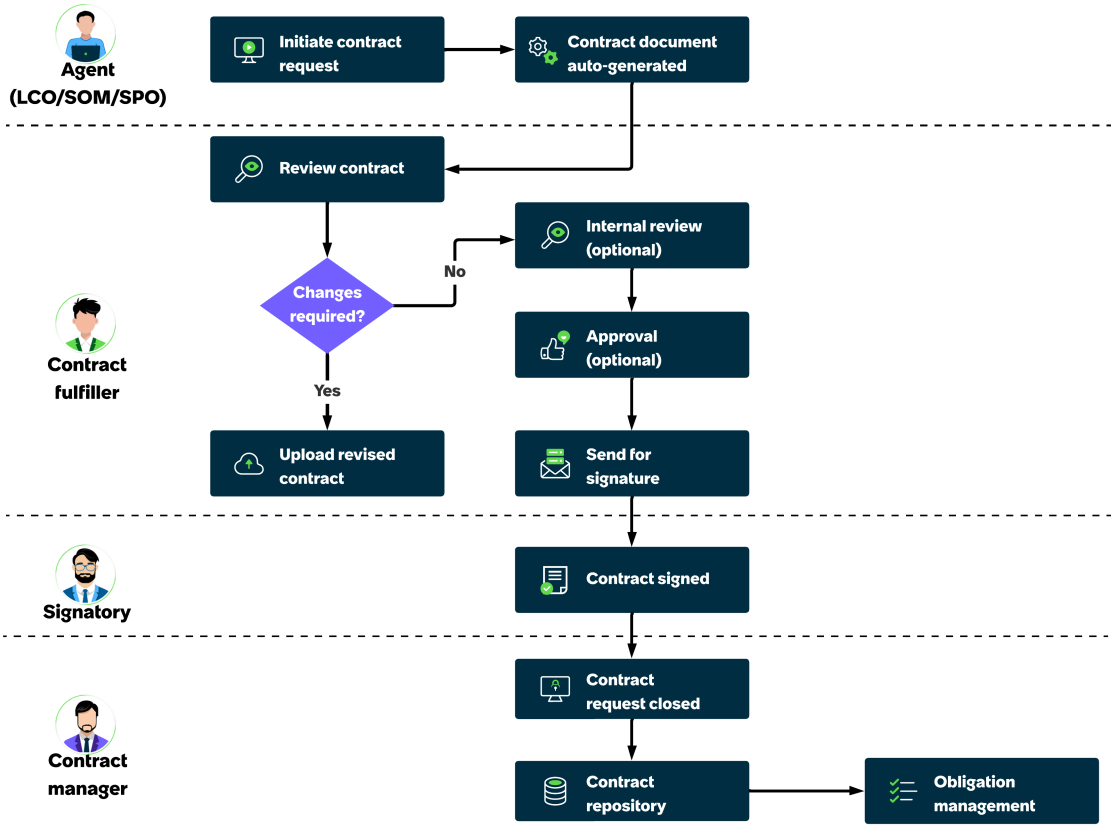
Self-served request workflow



1. The contract requester initiates a contract request.
2. A contract document is generated from a contract template and the metadata, clauses, signatories, and tables are added dynamically according to predefined conditions.
3. The contract fulfiller views the contract document and does one of the following actions:
   a. If no changes are required, gets approval from stakeholders. Sends the contract document for signature.
   b. If any changes are required, uploads a new revision of document and gets approval from stakeholders before sending it for signature.
4. If any signatory declines the document, it is sent back to the requester to be reworked and the revision is sent for signature.
5. After all signatories have approved the document. The signed contract is attached to the contract request record.
6. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The requester and department members can access the signed contract document from the Contracts repository.

Non-self-served contract request workflow

The following image provides an overview of the non-self-served contract requests.

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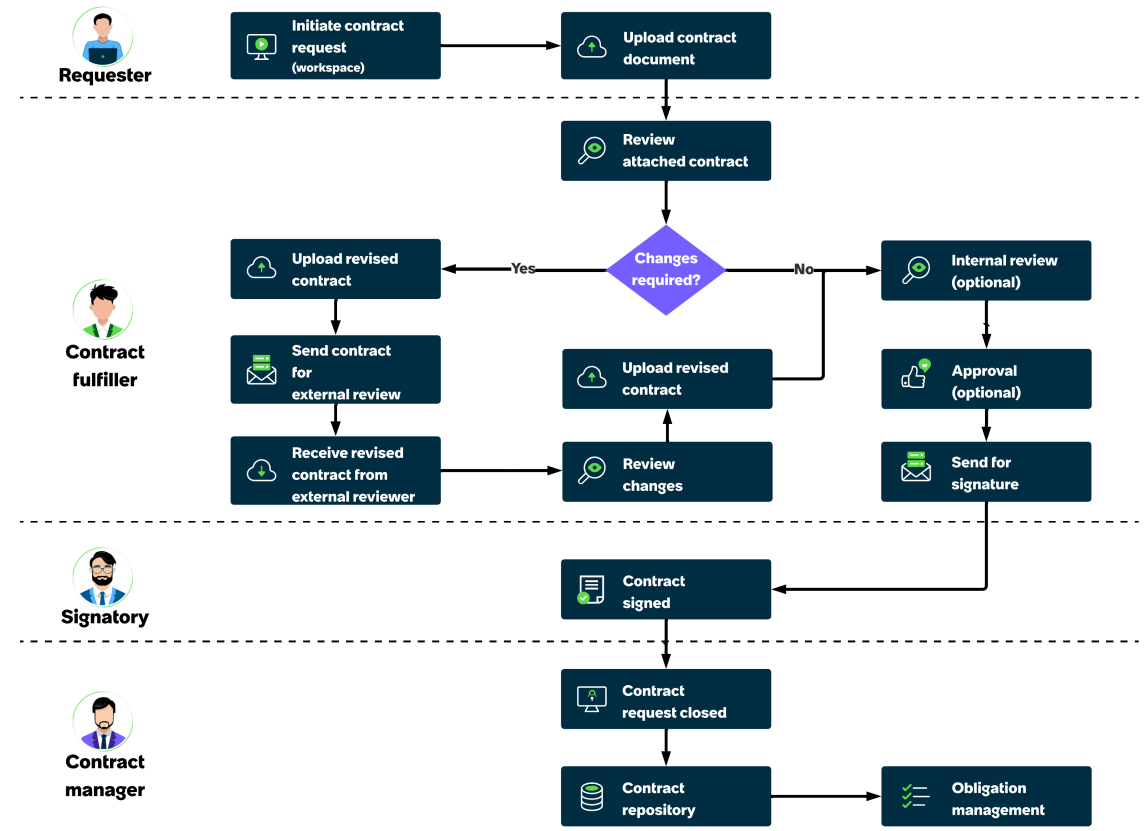
Non-self-served request workflow



A workflow for non-self-served contract request might progress as follows:

1. The Contract requester initiates a contract request from the workspace.
2. The Contract requester uploads a single contract or multiple contracts and their supporting documents and classifies them.
3. The contract fulfiller views the contract document attached to the contract request.
4. If necessary, the contract fulfiller reclassifies the contract and supporting documents.
5. The contract fulfiller views the contract document and does one of the following actions:
   a. If no changes are required, gets approval from stakeholders. Sends the contract document for signature.
   b. If any changes are required, modifies the contract document, gets internal or ad-hoc approval if required. Uploads new revision of the contract document and sends for signature.
6. If there are multiple contract documents, the contract fulfiller prepares for signatures by specifying the order. If there's an e-signature, the contract fulfiller adds the required fields and sends the contract document for signature.
7. Signatories review the contract document.
   - If no change is required, the contract document is signed by all the signatories.
   - If any changes are required, the signature is declined, and the user who is working on the contract request generates a new document and resends it for signature.
8. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The requester and department members can access the signed contract document from the contracts repository.

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Contract Management Pro benefits

Contract Management Pro benefits

Feature	Benefit	Users
Word Document Templates	Configure word document templates for contract to streamline and reduce the need for rework and maintain uniformity across generated contract documents. Set up dynamic content generation through mappings and conditions for clauses and tables.	Contract configurator
Clause Management	Effectively manage a library of clause variations. Use clause variations to dynamically place content in a contract depending on the specified conditions.	Contract configurator
Microsoft Word add-in for ServiceNow Contracts	Use Microsoft Word documents to add content controls that act as placeholders for the content. Word templates are easier to review, mark up, and modify.	Contract configurator
Contract and amendment requests	Initiate self-served or non-self-served contract requests.	Contract user
Contract amendments	Initiate and manage amendment requests.	Contract user, Contract fulfiller
Obligation Management	Track and manage contract obligations to help ensure compliance and minimize risks.	Obligation fulfiller or Obligation user
Configuring external applications for Contract Management Pro	Integration with external storage and electronic signature providers.	Contract configurator
Contracts Dashboard	Get an insight on the volume of contract requests that are handled by your team.	Contract fulfiller
Contract Workspace	Work with actionable widgets to categorize, prioritize, and efficiently work on contract requests.	Contract user or Contract fulfiller
Now Assist in Contract Management	Use Now Assist in Contract Management to analyze contracts for non-standard	Now Assist contract fulfiller

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Contract Management Pro benefits (continued)

Feature	Benefit	Users
	and missing clauses, and to extract information from signed contracts to add in the contract repository.	

What to explore next

To learn more about configuring and using Contract Management Pro, see:

- Configuring Contract Management Pro
- Using Contract Management Pro
- Now Assist in Contract Management
- Managing Contract Management Pro
- Contract Management Pro reference

Word Document Templates

Microsoft Word based contract template, enables you to create templates that are used to generate contracts or documents according to a submitted request.

Word document templates

Save time and the manual work of filling out contract documents or standard letters from scratch for each request by using contract or document templates to generate them. Word document templates can be used by business units to generate a contract document with predefined content when an employee submits a contract request. For example, you can create a contract template for Non-disclosure agreement to generate a Non-disclosure agreement contract document.

The contract template in Contract Management Pro takes a Microsoft Word document that contains content controls as an input. The content marked by the content controls are parsed and used to create clauses and clause variations.

You can add content controls either manually or by using the Microsoft Word add-in for ServiceNow Contracts. Use only one method for a single contract template.

Note:

By using Microsoft Word add-in, you can add content controls on macOS as well as Windows systems. The manual method enables you to add content controls only on Windows systems.

Word Document Templates features

- Support for contract templates in Microsoft Word format for standard contract documents such as non-disclosure agreements (NDA).
- Support for field, clause, signatories, and table content controls that act as placeholders for content in the document template.

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Word Document Templates benefits

- Document templates in Microsoft Word are easier to review, mark, and modify than PDF and HTML templates.
- Document templates reduce the need for rework and maintain uniformity across documents.
- Ability to set up dynamic content generation through mappings and conditions for clauses and tables.

Clause Management

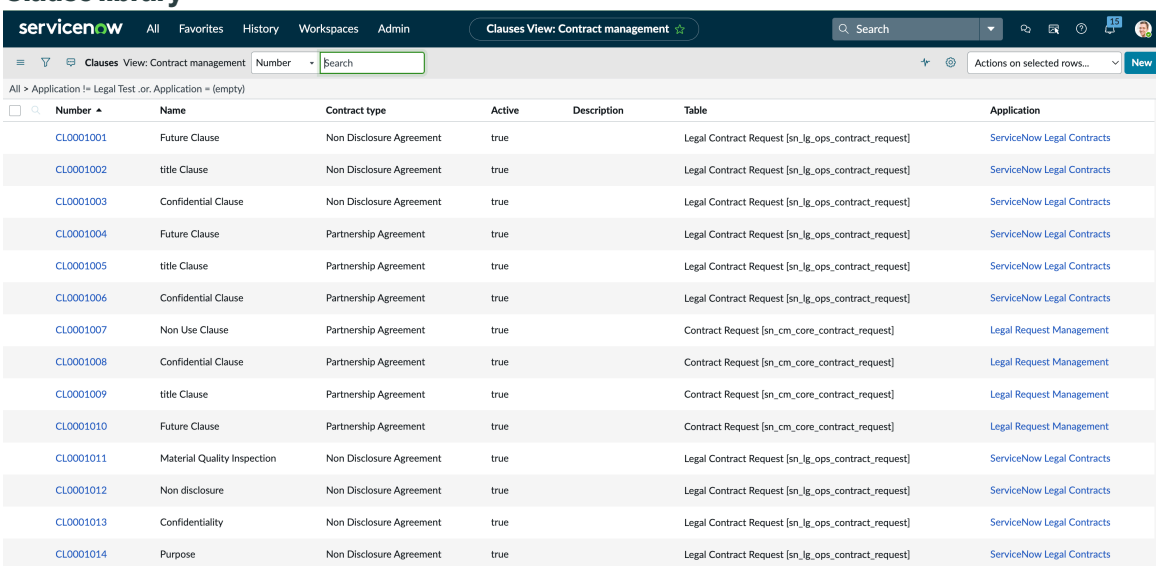
Clause management enables you to effectively manage a library of clauses, clause variations, and word document templates.

Clause

A clause is a collection of clause variations, which contain a block of content.

Clauses are stored in a clause library, from which you can insert them in contract templates. You can create and add clause variations while creating a contract template or add them later. For more information, see Create or edit a contract clause.

Clause library



Number	Name	Contract type	Active	Description	Table	Application
CL0001001	Future Clause	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001002	title Clause	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001003	Confidential Clause	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001004	Future Clause	Partnership Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001005	title Clause	Partnership Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001006	Confidential Clause	Partnership Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001007	Non Use Clause	Partnership Agreement	true		Contract Request [sn_cm_core_contract_request]	Legal Request Management
CL0001008	Confidential Clause	Partnership Agreement	true		Contract Request [sn_cm_core_contract_request]	Legal Request Management
CL0001009	title Clause	Partnership Agreement	true		Contract Request [sn_cm_core_contract_request]	Legal Request Management
CL0001010	Future Clause	Partnership Agreement	true		Contract Request [sn_cm_core_contract_request]	Legal Request Management
CL0001011	Material Quality Inspection	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001012	Non disclosure	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001013	Confidentiality	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts
CL0001014	Purpose	Non Disclosure Agreement	true		Legal Contract Request [sn_lg_ops_contract_request]	ServiceNow Legal Contracts

Clause variations

A clause variation is a block of content, which can be dynamically added to the contract document, eliminating the need for several templates for the same type of request. For example, say that for a Non-disclosure Agreement contract document only one section needs to be changed based on the geographic region of the signing entity. You would create multiple document templates with identical content with the only difference being location-related content. You could now use the condition-based clause variations to create only one contract template that can generate documents for different locations. For more information, see Configure dynamic clauses for contract templates.

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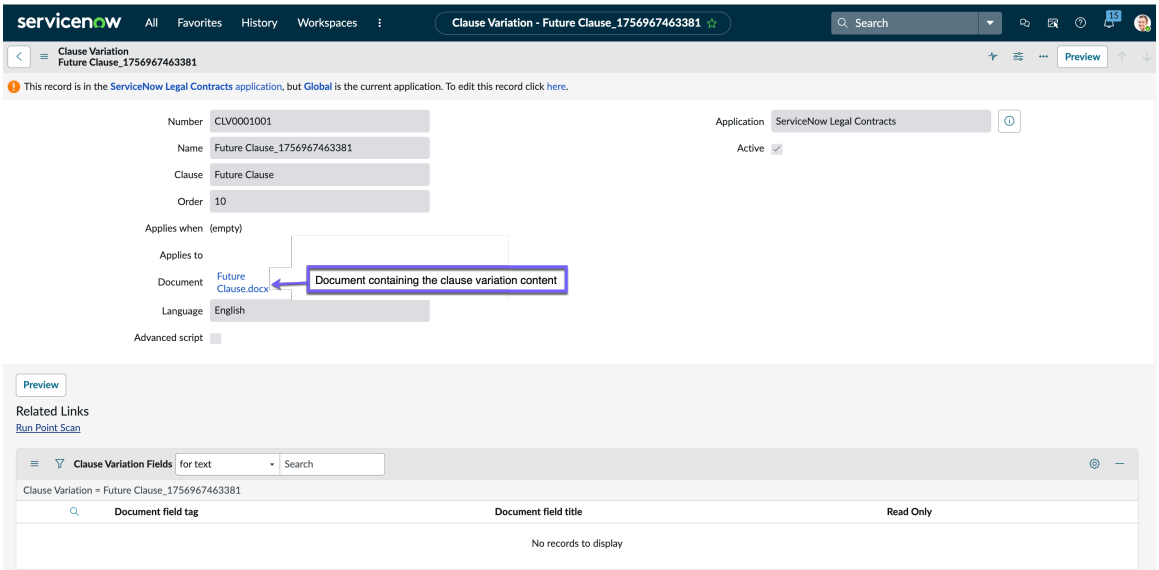
Clause variation

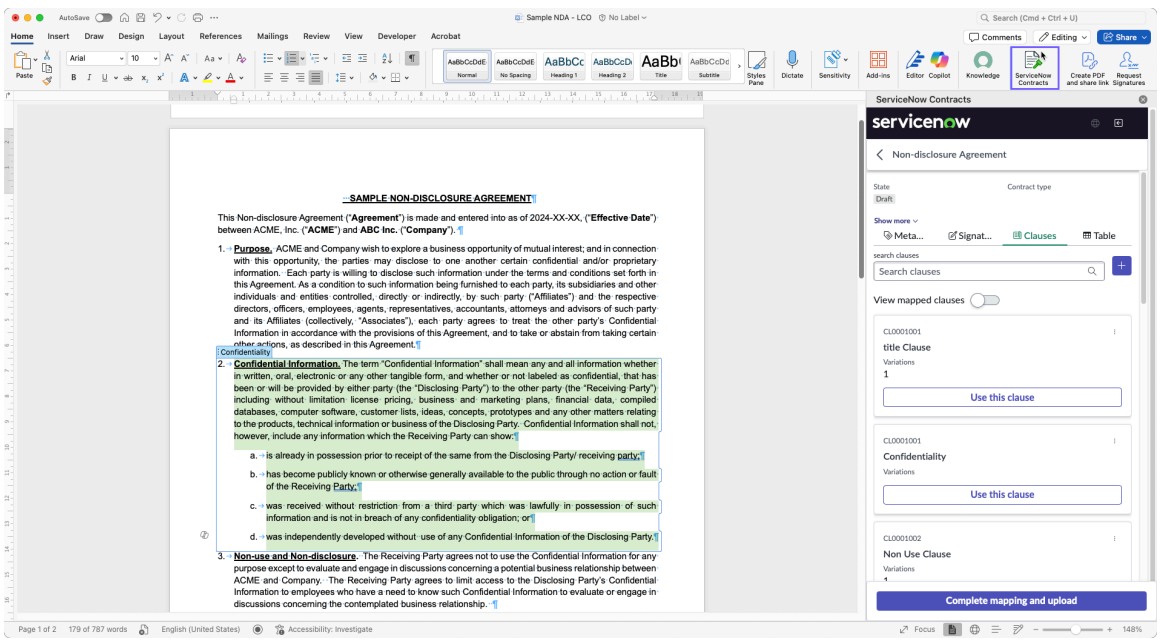


Clause Management benefits

- Effectively manage a library of clause variations using Clause Management.
- Use clause variations to dynamically place content in a contract depending on the specified conditions.
- Use contract templates to dynamically generate contracts for different conditions instead of having to create contracts for different circumstances manually.
- Add clauses from clause library to the contract revision during authoring or negotiation.

Microsoft Word add-in for ServiceNow Contracts

Microsoft Word add-in for ServiceNow Contracts enables you to add content controls in a Microsoft Word document in both Windows and macOS systems. Content controls act as placeholders for content in a document template



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Microsoft Word add-in for ServiceNow Contracts features

- Support for adding content controls for fields, clauses, tables, and signatories that act as placeholders for content in the document template.
- Support for adding content controls in both Windows and macOS systems using desktop or online versions of Microsoft Word.

Microsoft Word add-in for ServiceNow Contracts benefits

The Microsoft Word add-in enables you to add content controls on both macOS systems as well as on Windows systems, whereas adding content controls manually works only on Windows system.

For more information on content controls and how to configure contract template, see Add document content controls using Microsoft Word add-in for ServiceNow Contracts and Creating a contract template using Microsoft Word add-in for ServiceNow Contracts.

Contract and amendment requests

Contract Management Pro supports initiation of self-served contract requests, non-self-served contract requests, and amendment requests

The main difference between self-served and non-self-served contract requests is the use of own paper or third-party paper for generating contract documents.

Self-served contract requests

Self-served contract requests are fulfilled using the contract templates that are based on the company's own paper. Using contract templates, you save time and the manual work of filling out contract documents or standard letters from again for each request. In addition, contract templates ensure that the company’s contract guidelines are followed maintaining consistency. For example, you can create a contract template for a non-disclosure agreement to generate a non-disclosure agreement contract document. For more information, see Use self-served contract request.

Non-self-served contract requests

Non-self-served contract requests don’t use contract templates to generate contract documents but you can submit third-party paper contract documents for review. You don't need to create and configure any contract templates for third-party paper contract requests. Non-self-served contract requests support review of multiple contract and supporting documents from a single request. For more information, see Use non-self-served contract request.

Amendment requests

Amendment requests enable you to amend an existing contract by adding, removing, or updating terms, without the need to replace the entire contract.

The amendment workflow supports both own-paper and third-party amendment requests. While submitting an amendment request, you can select the **Type of paper** from the intake form.

For more information, see Contract amendments.

You can initiate an amendment request from your workspace using the **Initiate contract** modal.

Note: Third-party amendments are supported only for single contract types.

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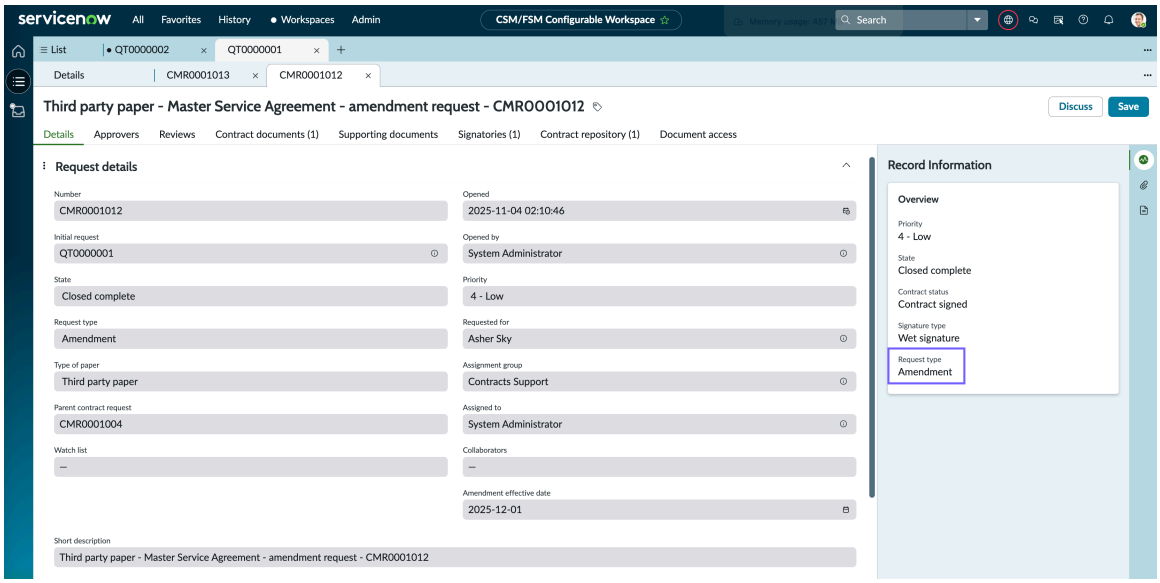
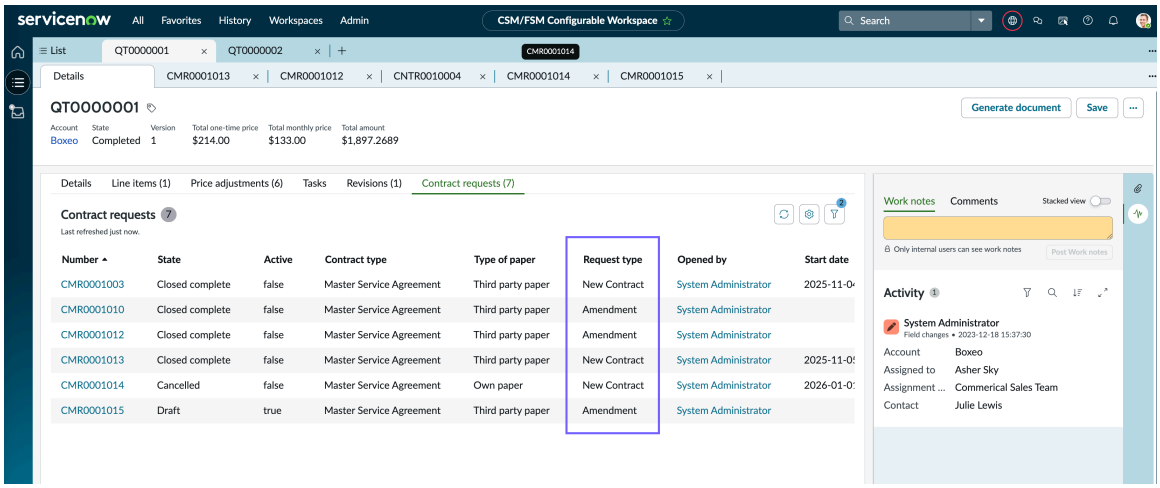
Distinguish contract and amendment request

The field, **Request type**, differentiates contract and amendment requests. For amendment request the value is **Amendment** and for contract request it's **New contract**.

The Request type field is displayed in the contract details and list view pages making it easy to differentiate between the two request types.





This field is also available in the following base system configurations (when demo data is installed) to indicate whether the configuration applies to a contract or an amendment request:

- Contract template rule
- Contract configuration

Optimizing Sales and Order Management through Contract Lifecycle Automation

Sales and Order Management integration with Contract Management Pro enables seamless integration between sales professionals and legal teams by enabling sales agents to create legal sales contracts from a quote.

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Benefits of integrating Contract Management Pro and Sales and Order Management

The integration provides the following benefits:

- Accelerate revenue recognition: Speed up the contract turnaround time to ensure a more predictable revenue stream
- Mitigate risk to the organization: Ensure contract compliance and consistency with pre-approved templates and proactive obligation management
- Optimize the quote-to-contract workflow: Streamline quote-to-contract processes with agile contract management
- Boost legal team productivity: Utilize common contract processes like review and signature to boost productivity.
- Reduce manual review work by using generative AI: Use AI to identify missing and non-standard clauses for reducing manual review work

Feature availability

Feature	Sales and order management	Contract management pro	All applications together
Product Catalog Management	✓	✗	✓
Pricing Management	✓	✗	✓
Lead Management	✓	✗	✓
Opportunity Management	✓	✗	✓
Sales Forecasting	✓	✗	✓
Quote Management	✓	✗	✓
Order Management	✓	✗	✓
Order to cash operations	✓	✗	✓
Post Sales Support	✓	✗	✓
Sales and Order Management workflows (lead-to-cash core)	✓	✗	✓
Customer Life Cycle Management Workflows	✓	✗	✓
Contract lifecycle management	✗	✓	✓
Contract document authoring	✗	✓	✓
Obligation Management	✗	✓	✓
Contract document Analysis using generative AI	✗	✓	✓
Contract document metadata extraction using generative AI	✗	✓	✓

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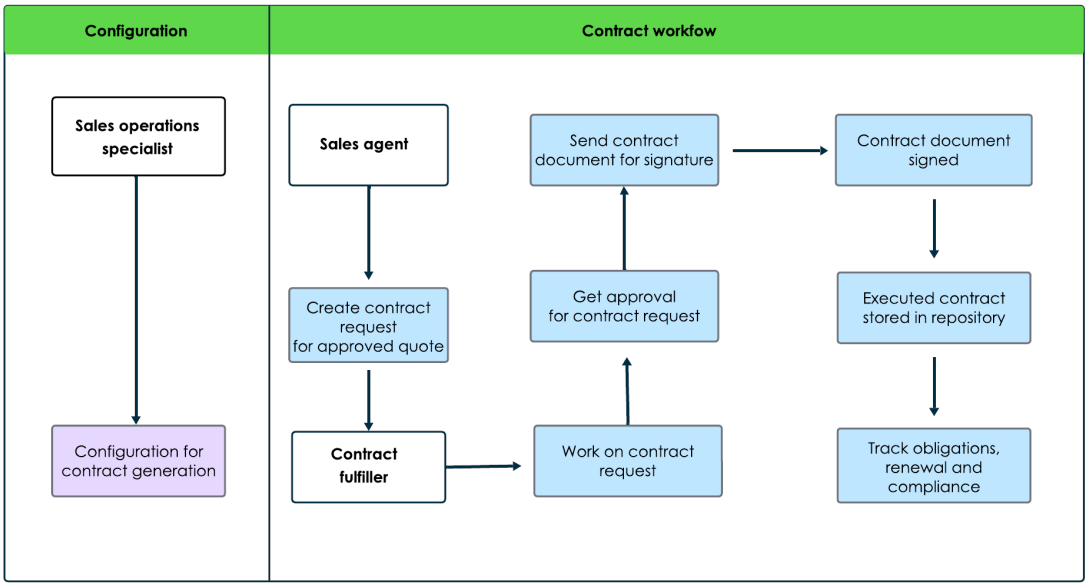
Workflow for Sales and Order Management

The following figure shows an example workflow of how an sales agent, sales operation specialist, and a contract fulfiller can use these applications to streamline collaboration with legal teams, enabling them to execute contracting tasks within the lead-to-cash workflow. It also provides sales operation professionals with full visibility into contract progress, reducing delays and improving operational transparency.

Sales and Order Management and Contract Management Pro workflow

Sales and Order Management - Contract Management Pro workflow



In this workflow:

1. Sales Agent creates forecast.
2. Sales Agent send the details to sales operation member to review customer requests and adds fall backs and/or non standard terms.
3. Sales operation member sends the quote for approval.
4. Sales operation member shares approved quote with sales agent.
5. Sales Agent creates contract based on approved quote.
6. Sales Agent send contract to customer for review.
7. Sales operation member sends for legal team approval.
8. Sales Agent sends contract to customer and internal signatory signature.
9. Contract signed by signatories.
10. Contract record created with signed contract.
11. Track milestones & compliance

User roles

The following roles are required to initiate, view, and manage contract execution:

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- **Sales agent**: This role is required to create and manage sales quotes, which are formal offers for products or services that agents propose to customers.
- **Contract fulfiller**: This role is assigned with the Sales agent role and it enables sales agents to create contracts and execute the contract workflow. Users with the Contract fulfiller role can perform all key actions, including authoring contracts, obtaining signatures, and tracking revisions.
- **Contract configurator**: This role is assigned with Sales Ops specialist role and it enables sales ops specialists to configure data required for contract initiation and its related tasks.
- **Contract user**: This role is required to initiate and track contract execution.

Requirements for integrating Sales and Order Management and Contract Management Pro

1. Install Quote Management.
2. Install Contract Management Pro.
3. Integrate with Contract Management Pro.

For more information, see Quote Management integration with Contract Management Pro.

Get started with initiating contract request

Get started with initiating contract request by completing these tasks:

1. Configuring Sales and Order Management applications.
2. Configure Contract Management Pro

Create a contract type

Create a contract type for defining different types of contract requests and associate it to a contract model.

Role:contract administrator.

Configure templates for a contract and amendment request in Contract Management Pro

Create a contract template of type .docx that can be used when submitting a contract request to generate a standard contract with predefined content.

Role:contract configurator.

Configure dynamic clauses for contract templates

Enable dynamic customized content in contract templates through clauses that contain clause variations for preset conditions.

Role:contract configurator.

Define an internal signatory rule

Define a user as an internal signatory rule so that the signer can be added to a contract template to automatically add to the contract document for a request.

Role:contract configurator.

Create document template categories

Create document template categories to easily identify similar documents and find the correct document template more easily.

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Role:contract configurator.

Create a contract configuration

Define the contract repository where the contracts will be stored and map the data to be added to the contract document.

Role:contract configurator.

3. Initiate a contract request

Optimizing Sourcing and Procurement Operations through Contract Lifecycle Automation

This solution enables seamless collaboration between sourcing professionals and legal teams by embedding contract request workflows into the Sourcing and Procurement Operations workflow.

Benefits of integrating Contract Management Pro and Sourcing and Procurement Operations

Using Sourcing and Procurement Operations and Contract Management Pro together provides the following benefits:

- Streamline Procurement and Contracts: Seamlessly request and manage contracts directly within the procurement workspace.
- Mitigate risk to the organization: Ensure contract compliance and consistency with pre-approved templates and proactive obligation management
- Control spend with contract data: Optimize procurement cost with access to historical metadata through a robust contract repository
- Boost legal team productivity: Utilize common contract processes like review and signature to boost productivity.
- Reduce manual review work by using generative AI: Use AI to identify missing and non-standard clauses for reducing manual review work

Feature availability

Feature	Sourcing and Procurement Operations	Contract Management Pro	All applications together
Connected procurement workflows across systems	✓	✗	✓
Omni-channel self-service for employees and suppliers	✓	✗	✓
Non-standard and negotiated purchasing capabilities	✓	✗	✓
Catalog access for goods and services requests	✓	✗	✓
Automated procurement with supplier risk assessment	✓	✗	✓
Interactive experiences for supplier engagement	✓	✗	✓

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Feature availability (continued)

Feature	Sourcing and Procurement Operations	Contract Management Pro	All applications together
Contract lifecycle management	✗	✓	✓
Contract document authoring	✗	✓	✓
Obligation Management	✗	✓	✓
Contract document Analysis using generative AI	✗	✓	✓
Contract document metadata extraction using generative AI	✗	✓	✓

Within the Source-to-Pay Workspace, Procurement Specialists can create contract requests for the following records:

- Purchase requests
- Purchase lines
- Sourcing requests
- Negotiations
- Negotiation events

Workflow for Sourcing and Procurement Operations and Contract Management Pro

The following figure shows an example workflow of how a procurement specialist and a contract fulfiller can use these applications to streamline collaboration with legal teams, enabling them to execute contracting tasks within the procurement workflow. It also provides procurement professionals with full visibility into contract progress, reducing delays and improving operational transparency.

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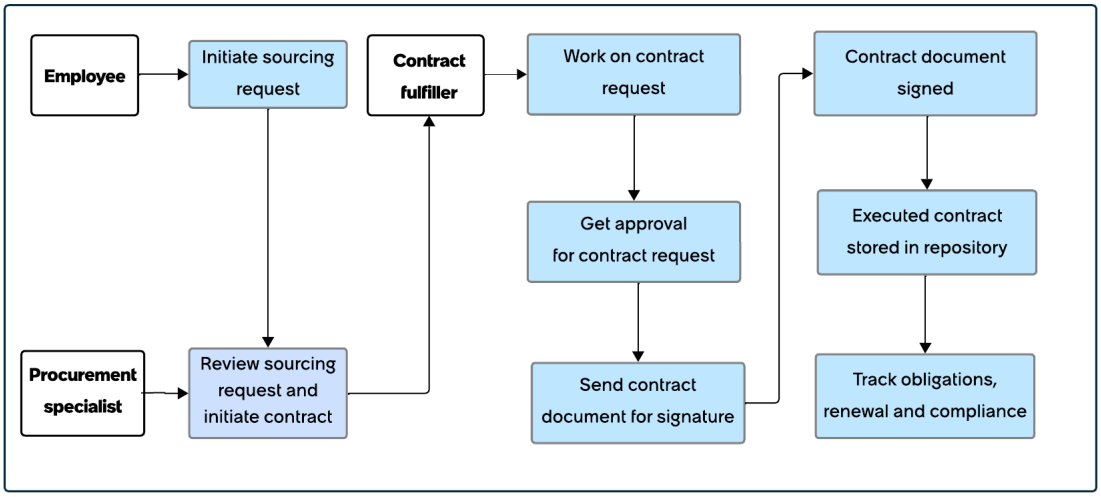
The Sourcing and Procurement Operations and Contract Management Pro workflow

Sourcing and Procurement Operations and Contract Management Pro workflow



In this workflow:

1. The employee initiates a sourcing request from the Sourcing and Procurement Operations workspace.
2. The procurement specialist reviews the sourcing request and initiates contract request.
3. The contract fulfiller reviews contract terms and clauses.
4. The contract fulfiller finalizes the contract document.
5. The contract fulfiller send the contract document for signature.
6. The contract document is signed.
7. A contract repository record with signed contract document is created in Sourcing and Procurement Operations.

User roles required for the Contract Management Pro and Sourcing and Procurement Operations better together solution

The following roles are required to initiate, view, and manage contract execution:

- **Sourcing and purchasing viewer**: This is a new role provided within the **Contract specialist** assignment group. This role can be assigned to the contracting and procurement professionals to have read-only access into the purchase lines, sourcing requests, negotiations, and purchase requisitions.
- **Contract fulfiller**: This is a licensed role for CM Pro. This role has to be explicitly assigned to the contracting and procurement professionals if they have to work on contract requests. Once assigned, they can work on the contract requests, leveraging all capabilities from CM Pro – obtaining contract signatures, authoring contracts, tracking revisions, and creating the contract documents to be stored in the contract repository.
- **Contract user**: This role is also provided within the **Contract specialist** assignment group and is required to initiate and track contract execution.

You can assign your procurement and contracting professionals to these roles as required.

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Requirements for integrating Sourcing and Procurement Operations and Contract Management Pro

1. Install Sourcing and Procurement Operations.
2. Install Contract Management Pro.
3. Integrate with Contract Management Pro.

> **Note:** To use this application, a license is required for both Contract Management Pro and Sourcing and Procurement Operations.

Get started with initiating contract request

Get started with initiating contract request by completing these tasks:

1. Configure Sourcing and Procurement Operations.
2. Configuring Contract Management Pro

   Create a contract type

   Create a contract type for defining different types of contract requests and associate it to a contract model.

   Role:contract administrator.

   Configure templates for a contract and amendment request in Contract Management Pro

   Create a contract template of type .docx that can be used when submitting a contract request to generate a standard contract with predefined content.

   Role:contract configurator.

   Configure dynamic clauses for contract templates

   Enable dynamic customized content in contract templates through clauses that contain clause variations for preset conditions.

   Role:contract configurator.

   Define an internal signatory rule

   Define a user as an internal signatory rule so that the signer can be added to a contract template to automatically add to the contract document for a request.

   Role:contract configurator.

   Create a contract configuration

   Define the contract repository where the contracts will be stored and map the data to be added to the contract document.

   Role:contract configurator.

3. Initiate a contract request.

Configuring Contract Management Pro

Install and configure foundational data for Contract Management Pro to effectively manage contract lifecycle for your organization.

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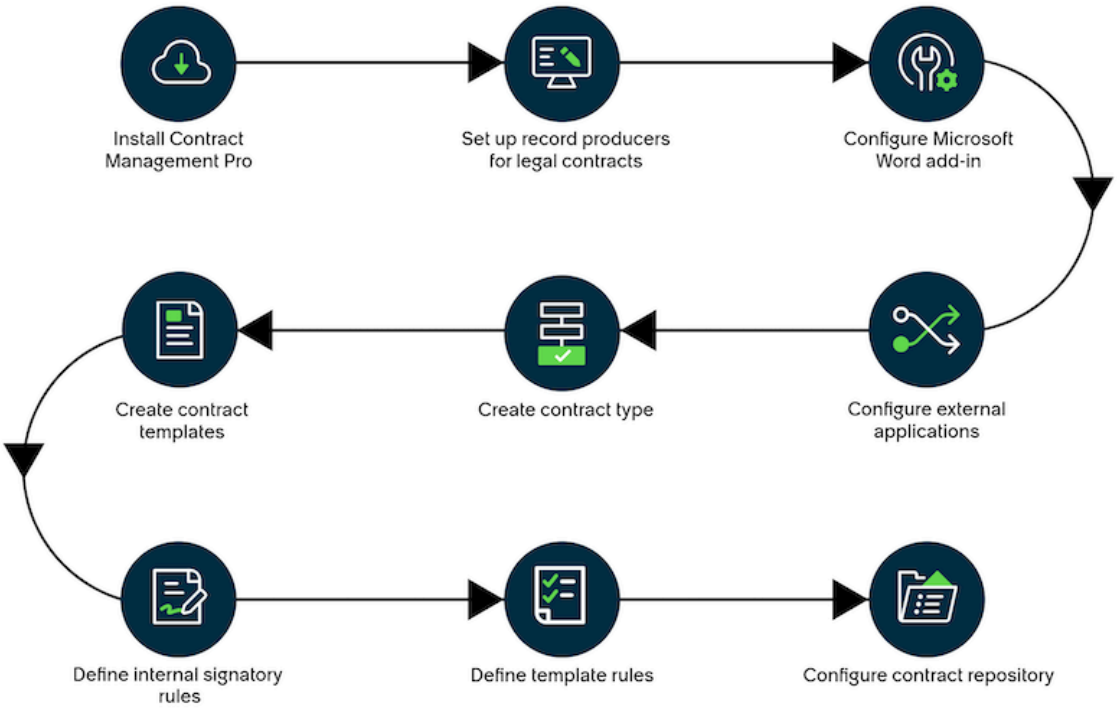
Configuration overview

This section provides a guided overview of all foundational setup tasks, from installing the application and integrating key tools, to defining contract types, templates, and repository rules.

Configuration steps



1. Install Contract Management Pro

   Install the#Contract Management Pro application. The application installs related #ServiceNow® Store applications and plugins, if they aren't already installed.

2. Set up record producers for legal contracts

   Create a record producer and specify base system settings so users can initiate contract request to seek legal department's guidance on legal contracts.

3. Configure the Microsoft Word add-in for ServiceNow Contracts

   Configure the Microsoft Word add-in for ServiceNow Contracts so that you can setup contract templates in Microsoft Word.

4. Configuring external applications for Contract Management Pro

   Set up external application in Contract Management Pro to support electronic signature and external storage.

5. Create a contract type

   Define various types of contract used in your organization and associate it with a contract model.

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6. Configure templates for a contract and amendment request in Contract Management Pro

   Create a contract template to add content controls for contract metadata, clauses, signatories, and dynamic tables. Contract documents in own-paper requests are generated from these contract templates based on contract type and other applicable rules.

7. Define an internal signatory rule

   Define an internal signatory rule to specify signatories for a contract template.

8. Configure contract template rules

   Define rules to select contract templates for generating contract documents in a contract request.

9. Configure contract repository

   Define a contract repository and map it to a specific table to store the executed contracts.

10. (Optional) Configure additional features in Contract Management Pro

    Set up these configurations to explore other useful capabilities in Contract Management Pro such as, enabling email notifications, related lists in contract requests, generating audit certificate, and activating contract workspace.

11. (Optional) Configure contract request functionality for your workspace

    Set up Contract Management Pro for your workspace.

Install Contract Management Pro

Install the Contract Management Pro application. The application installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Review the Contract Management Pro (sn_cm_pro) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Contract Management Pro:

- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Components installed with Contract Management Pro

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Contract Management Pro (sn_cm_pro) application using the filter criteria and search bar.

   You can search for the application by its name or ID. If you can't find the application, you might have to request it from the ServiceNow Store.

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The available versions are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Configure the Microsoft Word add-in for ServiceNow Contracts

As an admin, configure the Microsoft Word add-in for ServiceNow Contracts.

About this task

Microsoft Word add-in for ServiceNow Contracts will be installed when you install Contract Management Pro. You need to configure it to be available in the Microsoft Word as an add-in.

The following video walks you through the process of configuring Microsoft Word add-in for ServiceNow Contracts on macOS.

https://player.vimeo.com/video/1103595090?h=80fc82c814&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

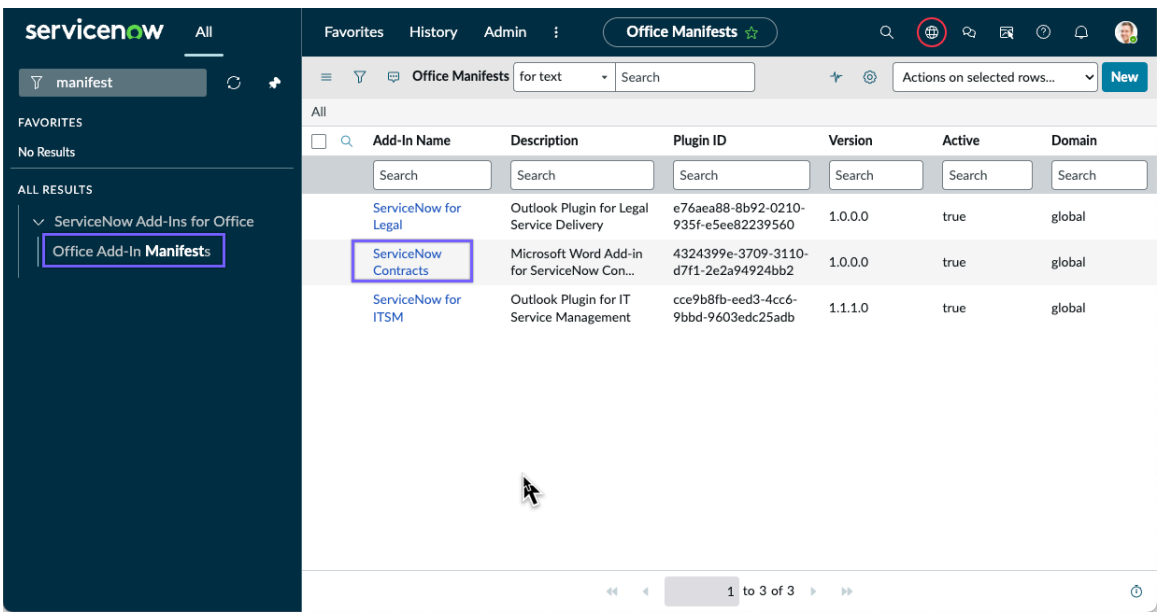
Ensure that the Global application for the Content-Security-Policy response header is inactive and the Microsoft Word Add-in for ServiceNow Contracts application is active. For more information, see Configure HTTP response headers.

Role required: admin

Procedure

1. Navigate to **All** > **ServiceNow Add-Ins for Office** > **Office Add-In Manifests**.
2. From the Office Manifests list, select **ServiceNow Contracts**.

Manifest file for ServiceNow Contracts



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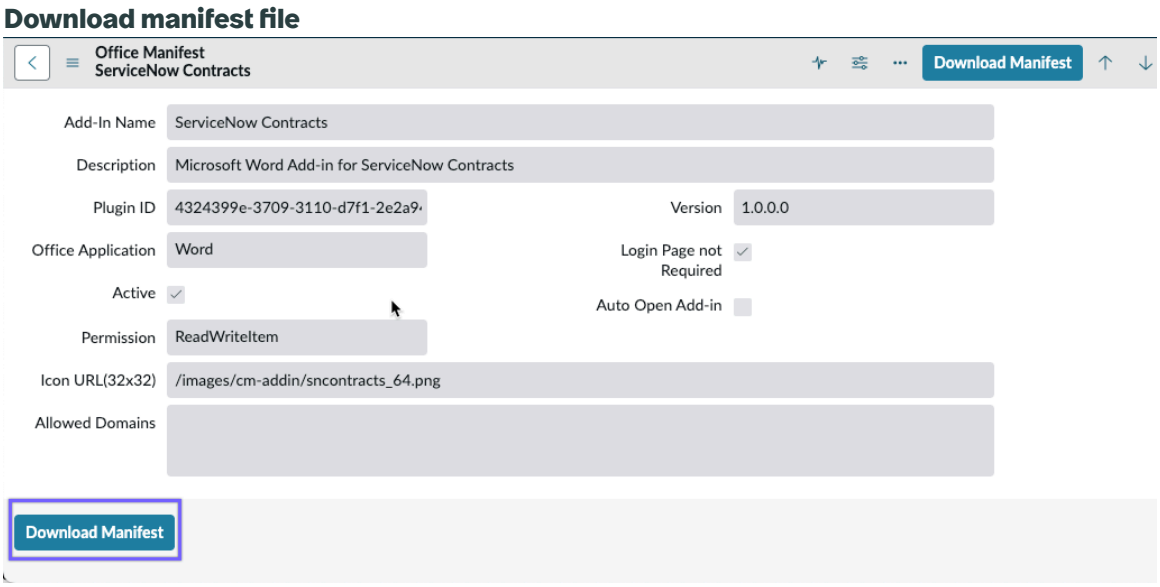
3. If your ServiceNow instance is configured with single sign-on (SSO) login, clear the **Login Page not Required** check box, right-click the form header, and then select **Save**.
4. Select **Download Manifest** to download the file.



5. If your ServiceNow instance is configured with single sign-on (SSO) login, update the manifest file.

   a. Open the manifest file.

   b. Locate the `AppDomains` element.

   c. Add a `AppDomain` element and enter the SSO host URL inside it.
   Example

```
<AppDomains>
<AppDomain><Instance URl></AppDomain>
<AppDomain><SSO Host URl></AppDomain> <!-- Enter the host URL
 only, e.g., www.<sso provider>.com -->
</AppDomains>
```

   d. Save the manifest file.

6. Configure the add-in.

System	Steps
macOS	**a.** Copy the manifest file to the `/Users/<user-id>/Library/Containers/com.microsoft.Word/Data/Documents/wef` directory. **b.** Open Microsoft Word. **c.** Open a document where you want to mark the content controls. **d.** Navigate to **Insert** > **My Add-ins**.

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System	Steps
	e. Select **ServiceNow Contracts**. **f.** Navigate to the menu **Home**. **Note:** To connect to multiple instances using the Microsoft Word add-in, add the corresponding manifest files to the wef folder in your system and ensure that each manifest file contains a unique ID.
Windows	**a.** Publish the manifest file. For more information, see Office Add-ins with the unified from the Microsoft Office 365. **Note:** Ensure you have completed the step for publishing the manifest file before proceeding with the next steps. **b.** Open Microsoft Word. **c.** Open a document where you want to mark the content controls **d.** Navigate to the menu **Insert** > **My Add-ins**. **e.** Select **ServiceNow Contracts** to add the add-in. **f.** Navigate to the **Home** menu.
Microsoft Word Online	**a.** Open Microsoft Word online. **b.** In the Home ribbon, select **Add-ins** > **More Add-ins**. The add-ins are displayed. **c.** Navigate to **ADMIN MANAGED**. **d.** Select **Upload My Add-in**. **e.** In the Upload Add-in pop-up, browse and select the manifest file. **f.** Select **Upload**. The Upload confirmation screen appears.

Result

The **ServiceNow Contracts** add-in is available on the Home ribbon. When you log in with ServiceNow instance credentials, the templates available in the ServiceNow instance appears in the add-in screen.

What to do next

Creating a contract template using Microsoft Word add-in for ServiceNow Contracts

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Configuring external applications for Contract Management Pro

Set up external applications that provide services such as electronically signing contract documents and saving signed contracts or the documents related to requests in an external storage system.

The Contract Management Pro application use spokes from Integration Hub to integrate with external applications. The contract configurator (sn_cm_core.contract_config) can complete configuring these external apps after the administrator completes installation and configuration of these spokes.

Integration with external storage systems

Configure external storage provider spokes

The administrator can use the Integration Hub to install and configure the following external storage provider spokes for saving documents attached to contract requests and signed contract documents:

- Google Drive spoke

> **Note:** Word (.docx) files edited directly from Google Drive using Google Docs may become incompatible with Contract Management Pro causing failures during processing, signature operations, and document updates. To avoid these issues, download the .docx file from the Google Drive, edit it in Microsoft Word (desktop or online), and upload it into the system using the Create Revision option.

- Microsoft OneDrive spoke

Configure an external storage provider

The contract configurator can set up the external storage app integrations from **Contract Integrations**. For more information, see Configure an external storage system.

External storage permissions

The permissions are granted at request level. All document folders and documents within the request folder inherit the permissions from the parent folder.

All user roles automatically have Read permission.

Write permission is granted to the following user roles when the contract request state is Work in progress or New (except if the contract document statues is also New):

- Assigned To
- Assignment Group Manager
- Collaborator

Integration with e-signature providers

Configure electronic signature provider spokes

The administrator can use the Integration Hub to install and configure the following electronic signature provider spokes for contract documents:

- Adobe Acrobat Sign spoke
- Docusign spoke

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Set up the electronic signature provider app

The configurator can set up the electronic signature app integrations from **Contract Integrations**. For more information, see Configure an e-signature provider.

Configure an external storage system

As a contract configurator, configure an external storage system to store signed contract documents.

About this task

The following video walks you through the process of configuring external storage for Contract Management Pro.

https://player.vimeo.com/video/1101939070?h=1bd8c1877f&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Ensure that the administrator has installed and set up spokes for the external storage system you want to configure.

Google Drive spoke v1.3.0 or later version

For more information on the setup and creating the Google Drive account, see Set up Google Drive spoke.

Note: Word (.docx) files edited directly from Google Drive using Google Docs may become incompatible with Contract Management Pro causing failures during processing, signature operations, and document updates. To avoid these issues, download the .docx file from the Google Drive, edit it in Microsoft Word (desktop or online), and upload it into the system using the Create Revision option.

Microsoft OneDrive spoke v2.1.0 or later version

For more information on the setup and creating the Microsoft OneDrive account, see Set up Microsoft OneDrive spoke.

Role required: sn_cm_core.contract_config

About this task

On configuring external storage, access permissions are granted to users associated with the contract request depending on the contract request state and contract document status. All user roles automatically have Read permission.

Write permission is granted to the following user roles when the contract request state is Work in progress or New and the contract document status is not Preparing for signature:

- Assigned To
- Assignment Group Manager
- Collaborator

Access permissions set on the parent request folder are automatically inherited by all sub folders and documents within it.

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Integrations** > **Integrations**.
2. Create or modify an external app configuration.

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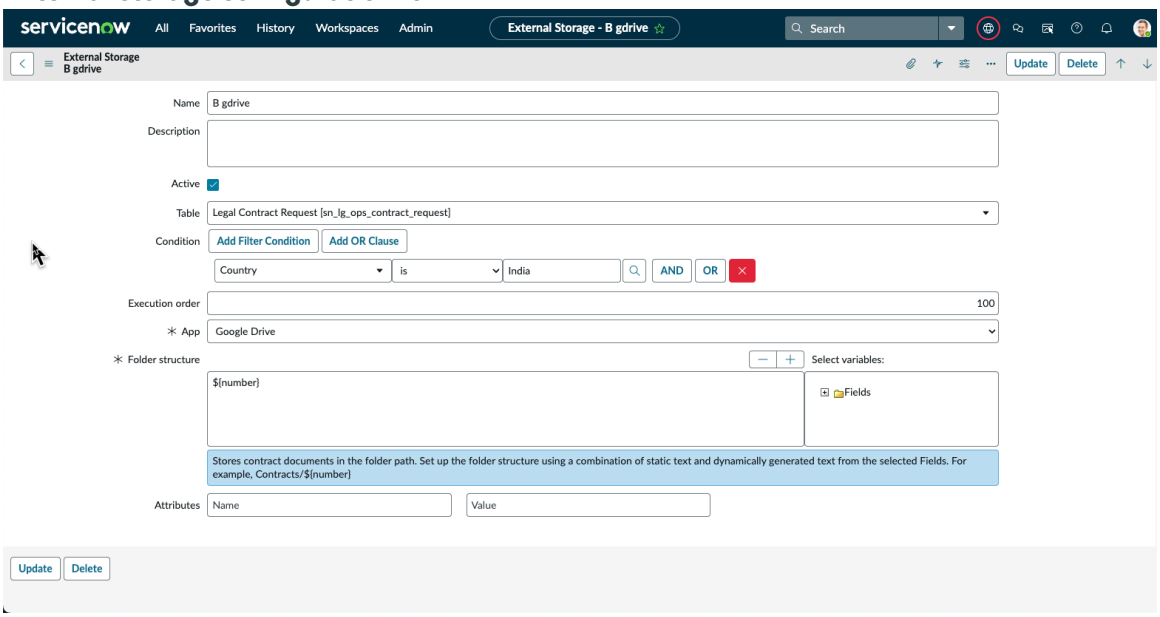
- To create an external app configuration, click **New**.
- To modify an existing external app configuration, open the existing external app configuration from the list.

3. On the Contract Integration Type page, click the **External Storage** link.

External storage configuration form



4. On the form, fill in the fields.

External Storage form

Field	Description
Name	Name of the external app configuration.
Description	Description of the external app configuration.
Active	Option for marking the configuration for external storage as active.
Table	Table configured to store the request details for your application. All the documents attached to the records created in the selected table are stored in the external storage you are configuring. For example, if you configure Google Drive as the external storage and select Contract Request table [sn_cm_core_contract_request], then all the documents attached to the records created in the Contract Request table will be automatically stored in Google Drive. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure a different table to configure external storage.

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Field	Description
	Note: If you select a different table, you must associate a corresponding flow.
Condition	Filter conditions to determine which integration app to use. For example, say you've already set up the Google Drive external storage integration and want to store only NDA contracts there, you can define the condition as follows: **[Category] [is] [NDA]** and then select the Google Drive. Similarly, you can define conditions based on region, for example, **[Location] [is] [United States]** and then select the Google Drive or **[Location] [is] [India]** and select the Microsoft OneDrive for better discovery.
Execution order	Order in which an external storage system is used for storing contract documents. The system with the lower-order value is chosen first.
App	External storage system such as Google Drive or Microsoft OneDrive.
Folder structure	Filepath to store the signed contract documents in the external storage system. Define a folder structure using a combination of static text and dynamically generated text from the selected fields. For example, the folder structure `Legal/${company}/Contracts/${number}`, where, ○ `Legal` and `Contracts` are the static texts ○ `${company}` and `${number}` are the fields chosen from the **Select variables** list. These field variables are dynamically replaced by the values in each field while saving a document.

5. Save the external app configuration.
   - Save a new external app configuration by clicking **Submit**.
   - Save the changes to an existing external app configuration by clicking **Update**.

Result
The external storage system is configured and ready to be used for storing contract documents.

Note: (Optional) You can view, edit, and delete the record.

For information on configuring electronic signature provider, see Configure an e-signature provider.

Configure an e-signature provider

Configure an electronic signature provider to enable users to sign contract documents electronically.

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About this task

The following video walks you through the process of configuring your e-signature provider for Contract Management Pro.

https://player.vimeo.com/video/1101939031?h=b0e8fb523e&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Ensure that the administrator has installed and set up spokes in Integration Hub for the electronic signature providers that you want to configure.

Adobe Sign spoke v2.8.0 or later version

For more information on the setup and synchronizing the Adobe Acrobat Sign group, see Synchronize Adobe Acrobat Sign group with ServiceNow.

DocuSign spoke v4.1.x or later version

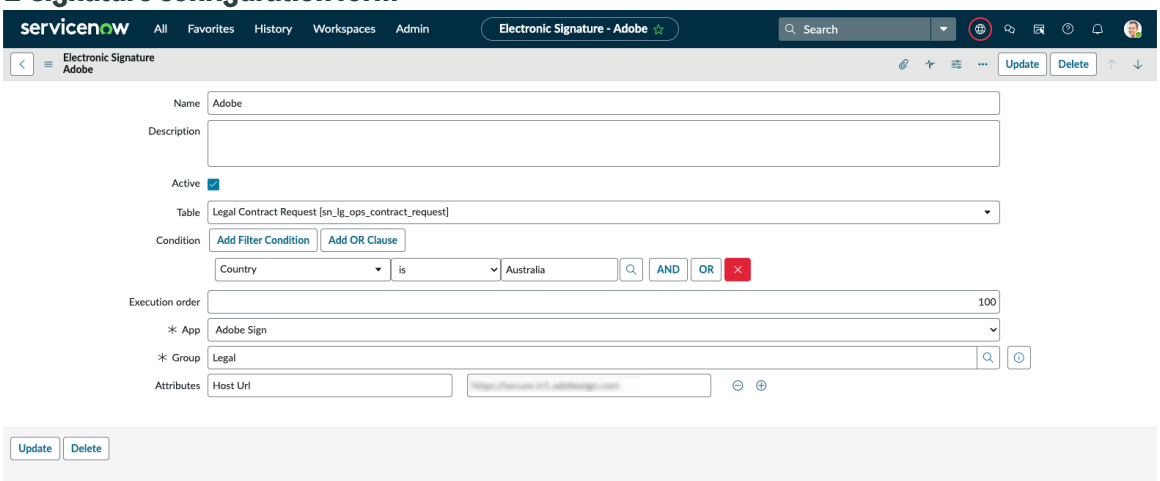
For more information on the setup and creating the Docusign account, see Set up Docusign eSignature spoke using authorization code grant.

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Integrations** > **Integrations**.
2. Create or modify an external app configuration.
   - To create an external app configuration, click **New**.
   - To modify an existing external app configuration, open the external app configuration from the list.
3. On the Contract Integration Type page, click the **Electronic Signature** link.

E-signature configuration form



4. On the form, fill in the fields.

Electronic Signature form

Field	Description
Name	Name of the external app configuration.
Description	Description of the external app configuration.
Active	Option for marking the external app configuration as active.

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Field	Description
Table	Table configured to store the request details for your application. All documents attached to records created in the selected table uses the configured electronic signature provider for signing. For example, if you configure Docusign as the electronic signature provider, and select the Contract Request table [sn_cm_core_contract_request], then all the contract documents attached to contract requests created in the Contract Request table will follow the Docusign e-signature flow for signing. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure a different table to configure electronic signature provider. **Note:** If you select a different table, you must associate a corresponding flow.
Condition	Filter conditions to determine which integration account to use. For example, say you've already set up the Docusign electronic signature account and want only NDA contracts to use that account for signatures, you can define the condition as follows: **[Category] [is] [NDA]** and then select the Docusign in the **Integration provider** and its associated account in **Account**.
Execution order	Order in which an integration account is used for electronic signature of contract documents. Integration account with the lower-order value is chosen first.
App	Electronic signature provider such as Adobe Acrobat Sign or Docusign.
Account	Account associated with the Docusign integration for Contract Management Pro. A Docusign account is used to manage users, templates, and documents. Organizations can configure separate accounts for different departments such as Legal or Procurement to manage their own signing workflows and permissions independently. This field appears only when Docusign is selected in the **App** field.
Group	Group associated with the Adobe Acrobat Sign integration for Contract Management Pro. Adobe Acrobat Sign groups are used to organize users and their documents based on teams or departments like Legal or

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Field	Description
	Procurement so that each group can manage its own signing workflows and permissions separately. This field appears only when Adobe Acrobat Sign is selected in the **App** field.
Attributes	Additional configuration items based on your electronic signature provider. Provide the following details: **Host Url**: Add the URL of the selected electronic signature provider that enables you to finalize or update the contract document before sending them to signatories. For example, use Web UI URL for **Adobe Acrobat Sign** or use **Docusign** UI for DocuSign.

5. Save the external app configuration.
   - Save a new external app configuration by clicking **Submit**.
   - Save the changes to an existing external app configuration by clicking **Update**.

Result
The configuration for the electronic signature is ready to be used for signing contract documents.

Note: (Optional) You can view, edit, and delete the record.

For information on configuring external storage, see Configure an external storage system.

Create a contract type

As a contract configurator, create a contract type for defining different types of contract requests and associate it to a contract model.

Before you begin
Ensure that the application is in Global scope.

Role required: sn_cm_core.contract_config

Procedure
1. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Contract Types**.
2. Create or modify a contract type.
   - To create a contract type, select **New**.
   - To modify an existing contract type, open the contract type from the list.

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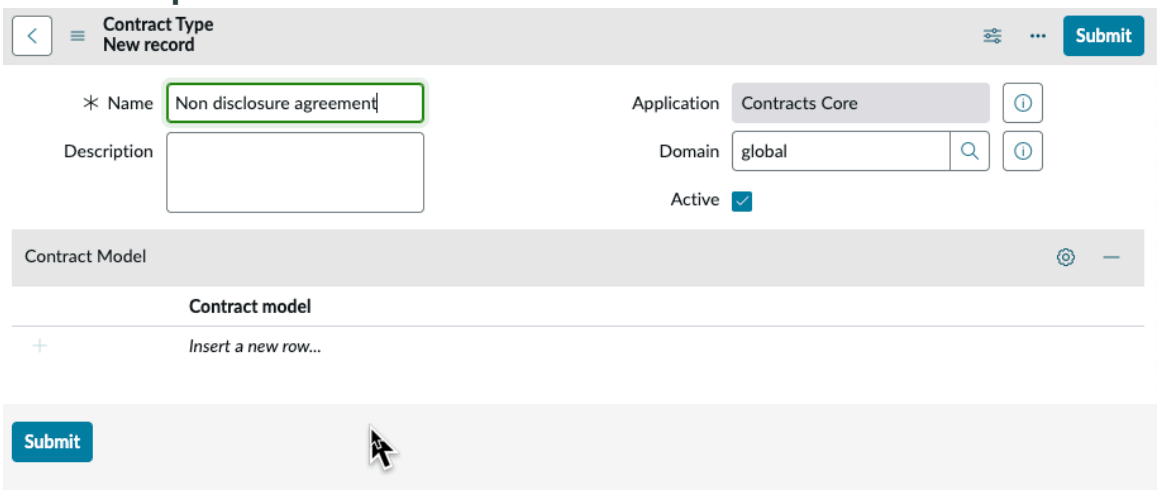
Contract template form



3. In the **Name** field, enter a unique name for the contract type.
4. The **Description** field, enter a description for the contract type.
5. Select **Active** to enable this contract type.
   Only active contract types are available for use in document templates, contract repository, and contract requests.
6. Add contract model.

   a. In the Contract Model embedded list, double-click **Insert a new row**.

   b. Select Lookup using list icon( ).
   List of contract models is displayed.

   c. Select the contract model that has not be mapped before to another contract type or create new one.

   Note: Map only one contract model to a contract type. An error will be displayed when try to save the contract type record after adding more than one contract model.

7. Save the contract type.
   - To save a new contract type, select **Submit**.
   - To save the changes to an existing contract type, select **Update**.

Result

The contract type is now available for selection in relevant configurations and when creating new contract requests.

Configure field mapping for parent-child contract linking

Select the child contract type and configure the parent-child field mapping to inherit the mapped fields from the parent contract when linking.

About this task

The following video walks you through the process of configuring parent-child field mapping to inherit mapped fields when linked.

https://player.vimeo.com/video/1101939047?h=05c71f2ee4&badge=0&autopause=0&player_id=0&app_id=58479

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About this task

You can configure a child contract type for a contract type and map the fields to automatically inherit values from the parent contract when linked. A contract type can have multiple child contract types and field mappings. You can map one field at a time.

The **Link and inherit fields** button on the Link contract window is available only when you configure the parent-child mapping.

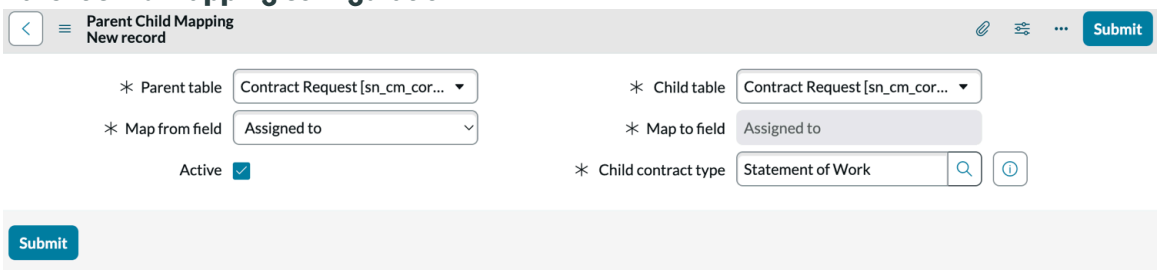
Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Contract Types**.
2. Select the contract type for which you want to configure a child contract type.
3. In the Parent Child Mappings related list, select **New**.
4. In the Parent Child Mapping form, configure the child contract type and map the fields.

Parent child mapping configuration



Parent child mapping form

Field	Description
Parent table	Table from which fields are to be copied for a child contract type.
Child table	Table to which fields are copied.
Map from field	Field in the parent table which is copied to a child contract type.
Map to field	Field in the child table that inherits the field from the parent table.
Child contract type	Child contract type for selected contract type.

5. Select **Submit**.
6. In the Contract type form, select **Update**.

Result

The parent child mapping is configured, and values from the mapped parent fields are inherited by the child contract when linked.

Create document template categories

As a contract configurator, create document template categories to easily identify similar documents and find the correct document template more easily. For example, a document template category of NDA-Japan could group non-disclosure agreements for Japan.

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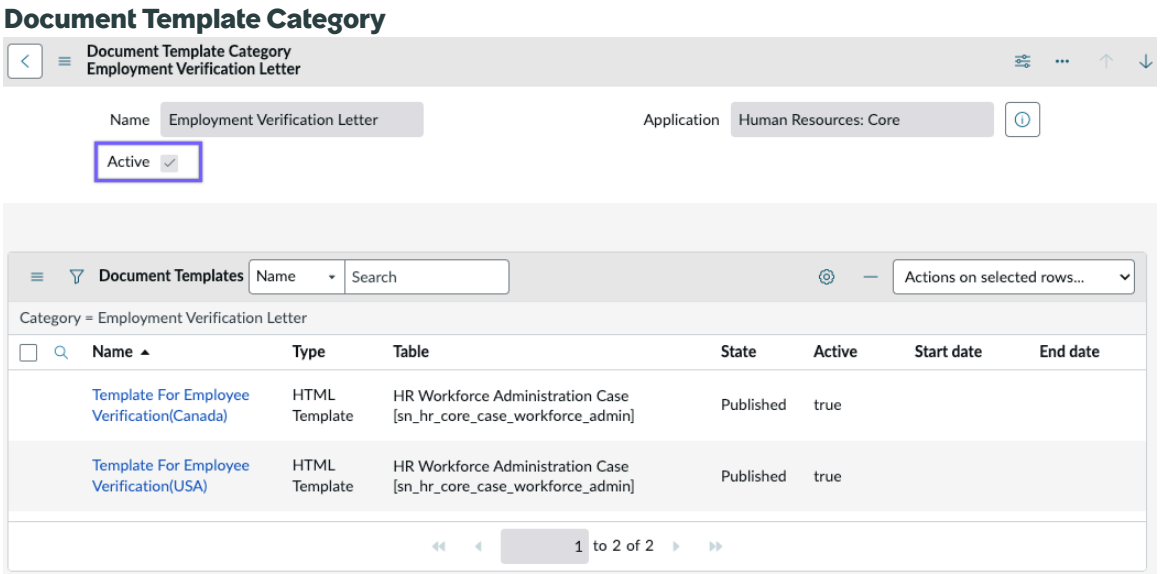
Before you begin
Role required: sn_cm_core.contract_config

Procedure
1. Navigate to **All** > **Document Templates** > **Document Template Categories**.
2. In the **Name** field, enter the name for the category.
3. Select **Active** to make the category active.



4. Select **Submit** to save the category.

Result
The document template category is activated and can be associated with a document template.

Configure templates for a contract and amendment request in Contract Management Pro

Create contract templates to easily generate Microsoft Word contract documents based on request types in Contract Management Pro.

The contract template in Contract Management Pro takes a Microsoft Word document that contains content controls as an input. The content marked by the content controls are parsed and used to create clauses and clause variations.

You can add content controls either manually or by using the Microsoft Word add-in for ServiceNow Contracts. Use only one method for a single contract template.

Note:

By using Microsoft Word add-in, you can add content controls on macOS as well as Windows systems. The manual method enables you to add content controls only on Windows systems.

For more information, see the following topics:

- Creating a contract template using Microsoft Word add-in for ServiceNow Contracts.
- Create contract template by manually adding content controls.

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Creating a contract template using Microsoft Word add-in for ServiceNow Contracts

Create contract templates by using Microsoft Word add-in for ServiceNow Contracts to add content controls.

Create a contract template to contain content controls

Create a contract template using the Microsoft Word add-in for ServiceNow Contracts to which you can then add content controls.

Before you begin

Verify that the application scope is set to **Global** by selecting the Application scope icon ( ) in the header of your homepage.

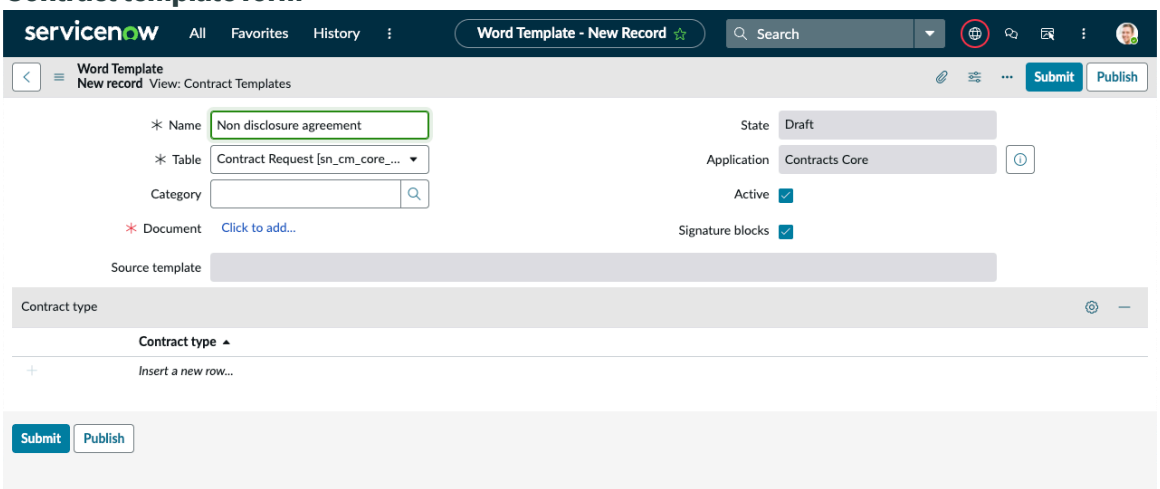
If you're creating a contract template for a non-task table, verify that the non-task table is added in the extension script. For more information, see Configure non-task tables for contract templates.

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Select **New**.

Contract template form



3. On the form, fill in the fields.

Word Template New Record form

Field	Description
Name	Unique name for the contract template.
Table	Table to which you want to associate the contract template. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure the template on a different table.
Category	Document category to which you want to associate the contract template.

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Field	Description
Document	Upload a Microsoft Word document of type `.docx`. This document will be replaced with an updated version containing content controls for metadata, signatory, and clauses using Microsoft Word add-in for ServiceNow Contracts.
State	The initial state is automatically set to Draft.
Application	Application to which the contract template belongs. This field is automatically set to the application scope in which you're creating the contract template.
Active	Option to make the template active and available for use.
Signature blocks	Option to disable signature blocks in the contract template. **Note:** The check box is selected by default to enable the signature block configuration for a contract template. When this option is selected: ○ You can't upload a participant-based template. ○ The **Participants** related list isn't available. For more information, see Add and configure signature blocks using Microsoft Word add-in for ServiceNow Contracts.
Start date	Date on which the Word document template becomes valid. Providing a start date helps when maintaining multiple versions of same template.
End date	Date until which the Word document template is valid. Providing an end date helps when maintaining multiple versions of same template. If the values in the **Start date** and **End date** fields are empty the template will be always valid. **Note:** If you specify an end date, you must also specify a start date.

4. In the **Contract Type** field, select only one category of the contract type.
   For example, if you're creating a template for a non-disclosure agreement, select **Non Disclosure Agreement** as the contract type.

   Note: Only active contract types are displayed in the list.

5. Select **Save**.

Result
The contract template is saved in the Draft state.

What to do next
Add document content controls using Microsoft Word add-in for ServiceNow Contracts

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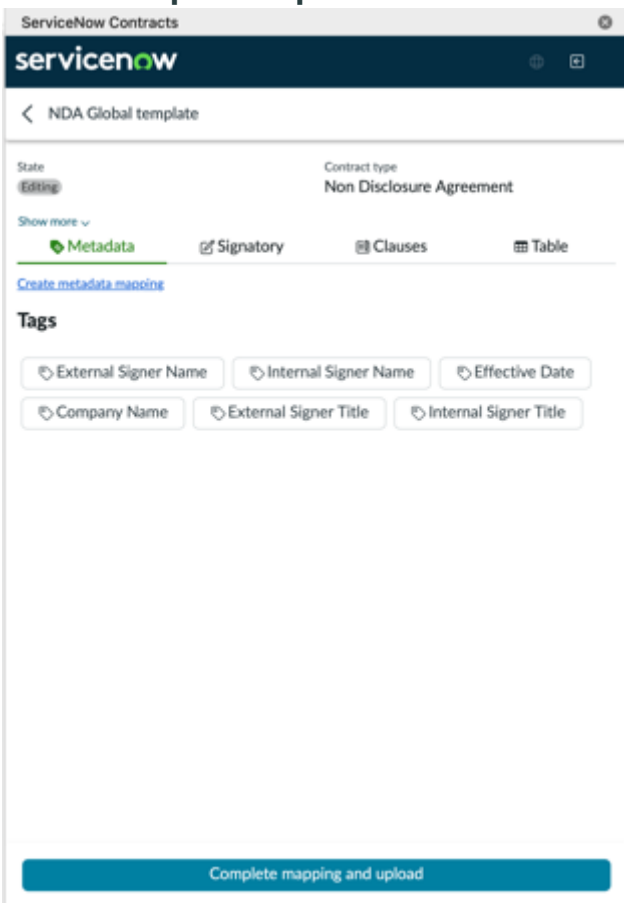
Add document content controls using Microsoft Word add-in for ServiceNow Contracts

Add content controls using the Microsoft Word add-in for ServiceNow Contracts. Content controls act as placeholders in contract templates.

The Microsoft Word add-in for ServiceNow Contracts enables you to add content controls for metadata, signatories, clauses, and table into the contract document from the following tabs.

- Metadata: View and add metadata for fields, variable, and variable sets to pre-fill the information in the contract document.
- Signatory: View and add signatories to add their signatures in the contract document.
- Clauses: View and add clause and clause variations to a contract document.
- Table: Determine the data that will be added from a data source table in your ServiceNow instance to a table in a contract document

Contract template components in Microsoft Word add-in



You can also switch application scope and log out using the following options:

- Switch scope icon: Use the switch scope icon ( ) to set the correct scope to enable editing of the contract template. This icon is active when you select a contract template for editing and also have an admin role.
- Logout icon: Use Logout icon ( ) to log out from Microsoft Word add-in for ServiceNow Contracts.

> **Note:** If you are directed to platform page instead of Word Add-in page when you re-login, follow the steps mentioned in this KB article to resolve the issue.

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Configure metadata for fields, variables, and variables sets in a contract document

As a contract configurator, add and configure metadata for fields, variable, and variable sets to pre-fill the information in the contract document.

Before you begin

The Microsoft Word add-in for ServiceNow Contracts must have been configured. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

A contract template must exist that is active and is in the Draft or Editing state. For more information, see Create a contract template to contain content controls.

Role required: sn_cm_core.contract_config and canvas_user

About this task

The metadata added for fields, variable, and variable sets act as placeholders for values that will be used while generating contract document.

Note: In Contract Management Pro version 1.4.1, the Legal Contract Request form in Legal Counsel Center and Contract Workspace displays only mapped legal fields for variables in the contract fulfiller view. You therefore need to apply the **Field mapping** option when setting up Metadata mapping for legal contracts. For existing templates with Variable mapping, edit the template and update the configuration with **Field mapping**.

For more information on editing a contract template, see Edit a contract template using Microsoft Word add-in for ServiceNow Contracts.

- The metadata of the type Field mapping gets its value from the table that the contract template is associated with.
- The metadata of type Variables gets its value from the record producer.

Procedure

1. Open the document in which you want to mark the content controls in Microsoft Word.
2. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.
3. On the login screen, enter the credentials of the ServiceNow instance for which the Microsoft Word add-in is configured.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. On the add-in screen in the **Templates** tab, select the contract template to which you want to add the metadata.
   Only templates that have been created in the global application scope are visible.
5. In the Microsoft Word document, place the cursor where you want to add the placeholder for metadata.

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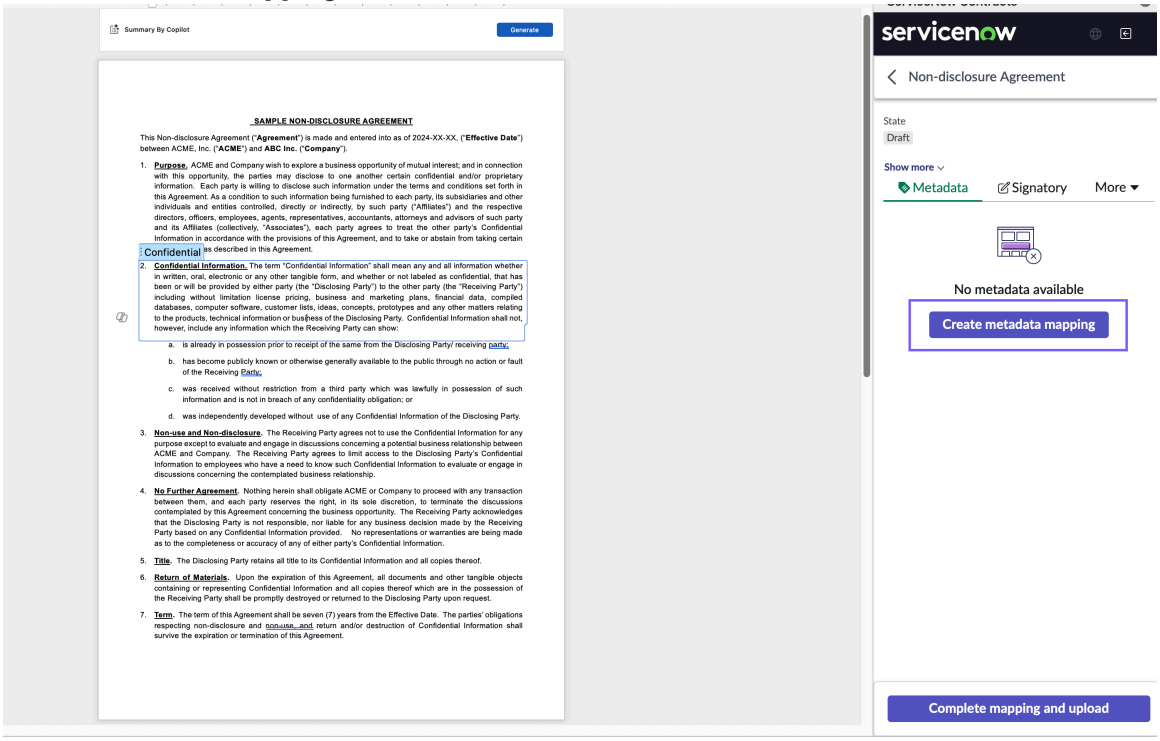
Create metadata mapping



6. In the **Metadata** tab, select **Create metadata mapping**.
7. On the Create mapping form in the **Type** field, select either field mapping or variables.

Type of metadata	Fields available
Field mapping	○ **Mapping field**- Fields of the table to which the contract template is associated. ○ **Field Name**- The field is automatically set to the value of the **Mapping Field**. You can al so modify the value.
Variables	**Note:** If a fulfiller updates the legal fields in a contract request and the tem plate of the contract request uses vari able mapping, the contract document will not be updated with the new values when you create a contract revision. ○ **Record producer**- The record producer from which you want to add the variable. For example, if you want to add a variable from a contract request for a non-disclo sure agreement, select the record producer for a non-disclosure agreement. ○ **Variable**- The variable of the record produc er that you want to add. ○ **Variable set row**- The row value of the vari able set. The field is displayed only when

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Type of metadata	Fields available
	the selected value in **Variable** is a set of val ues. For example, the Signatory variable is a set of variables for Title, Name, and email address. You can visualize this data set in rows and columns. **Signatory** | | **Title** | **Name** | **Email address** | | Row1 | Manager | Abel Tuter | abel.tuter@acme.com | | Row2 | COO | Beth Anglin | beth.anglin@acme.com | | Row3 | Lead | Lana Keels | lana.keels@acme.com | If you wanted to map the variable to Beth Anglin, you would enter Row2 as the value in the **Variable set row** field. ○ **Field Name**- This field is automatically popu lated depending on the values for **Variable** and **Variable set row**. You can also modify the value. The maximum character limit for the field name is 200. **Note:** Validation errors might occur for the following reasons: ▪ The field name is not unique. ▪ You have mapped metadata to a field that has already been mapped.

8. Select **Create**.

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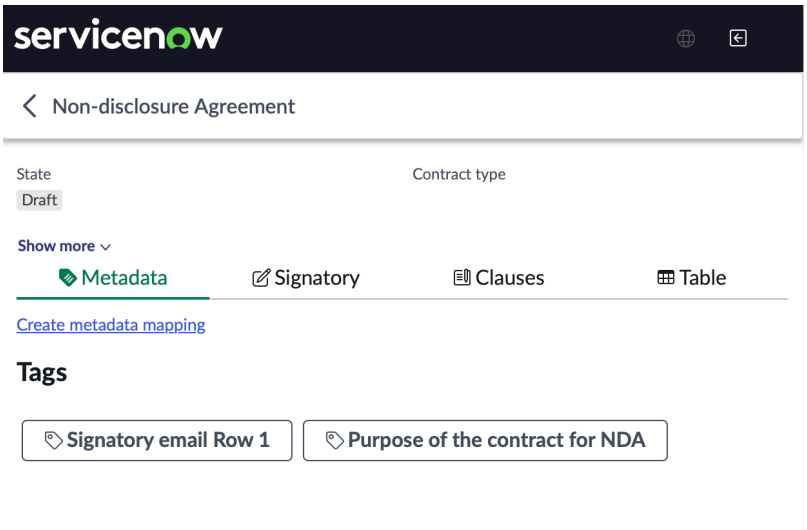
- The metadata is added and displayed as a tile with the field name as the title.

View added metadata



- The metadata is synced to the ServiceNow instance.

Note:

If you have included the sys_id variable, you must adjust this script to display it correctly. For more information, see Configure fields in contract template to display correct sys_id value in contract documents.

9. **Optional:** Add the metadata to other locations in the document or the header or footer of the Word document by selecting the tile and moving it to the desired location.
10. **Optional:** View the metadata by logging in to your ServiceNow instance and navigating to the **Template Mappings** related list of the contract template.

Configuring signatories in Contract template using Microsoft Word add-in

For signatories to add their signatures in the contract document, you can either create signature blocks or configure participants in a contract template with placeholders.

Add and configure participants for a contract using the Microsoft Word add-in for ServiceNow Contracts

As a contract configurator, configure participants and add placeholders for their signatures using the Microsoft Word add-in for ServiceNow® Contracts.

Before you begin

The Microsoft Word add-in for ServiceNow Contracts must have been configured. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

An active contract template must exist in the Draft or Editing state where the **Signature blocks** option is not selected. For more information, see Create a contract template to contain content controls.

Role required: sn_cm_core.contract_config and canvas_user

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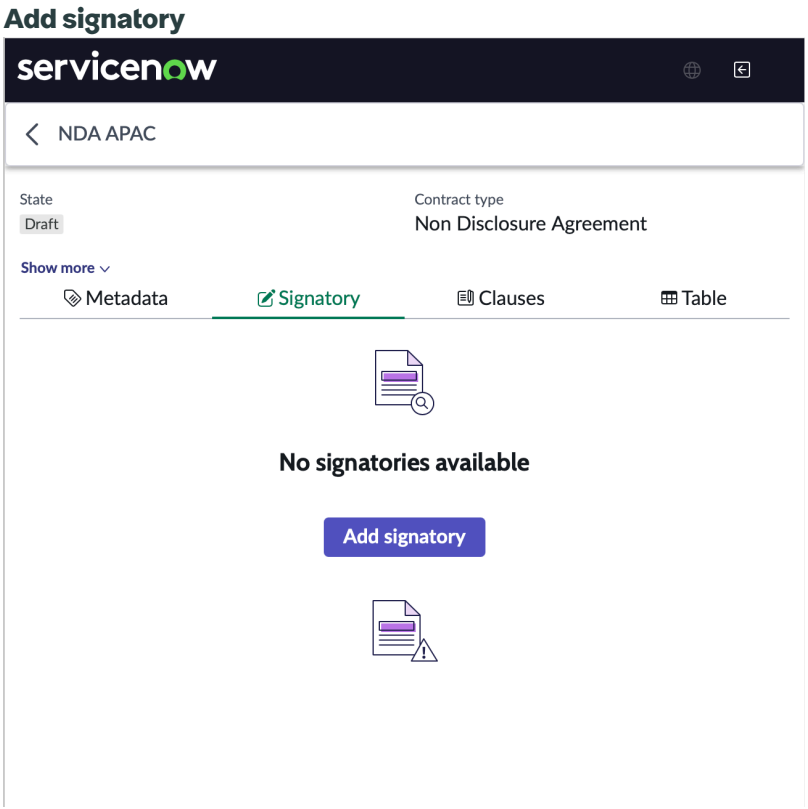
Procedure

1. Open the document in which you want to mark the content controls in Microsoft Word.
2. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.
3. In the login screen, enter the credentials of the ServiceNow instance from which you downloaded the manifest file.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. On the add-in screen in the **Templates** tab, select the contract template to which you want to add the metadata.
5. In the **Signatory** tab, select **Add signatory**.



6. Add and configure the participant as either an internal or external user.
   - While adding signatory details, if you add value in the **User** field, the participant is considered an internal signatory.
   - While inserting content controls for signatures or signatories, ensure the font color of the tagged text matches the document's background color.

Type of signatory	Available fields
Internal	○ **Name** - Unique display name of the mapped signer. ○ **Order** - Unique order in which a signature has to be initiated for the participant to complete the action. ○ **User** - The field from the table associated with the contract template that acts as a placeholder for the user. For exam ple: **Assigned to**.

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Type of signatory	Available fields
	Note: ▪ When you select a value for this field, the participant is considered to be an internal user. If values are pro vided for the optional fields **Participant Name** and **Participant Email** along with the **User** field, the elec tronic signature request is sent to participant email values rather than the **Name** and **Email** fields associ ated with the user record. ▪ If the **Advanced script** field is selected, the value in the **User** field is cleared when you save or update the template. ○ **Participant name** (Optional) - The field from the table associ ated with the contract template that will act as a placeholder for the participant name. For example: **Closed by**. ○ **Participant email** (Optional) - The field from the table asso ciated with the contract template that acts as a placeholder for the participant email address. For example: **Closed by > Email**. ○ **Participant title** (Optional) - Option to specify the title when the defined participant is an external user. **Note:** ▪ The value in the Participant title field is cleared when you save or update the template with the Advanced script field selected. ▪ This field is available only when signing type is AdobeSign or DocuSign.
External	○ **Name** - Fields of the table to which the contract template is associated. ○ **Order** - Order in which a signature has to be initiated for the participant to complete the action. ○ **User** - Do not provide any value. ○ **Participant name** - The field from the table associated with the contract template that acts as a placeholder for the par ticipant name. For example: **Closed by**. This field is available only when the signing type is AdobeSign or DocuSign. **Note:** The value in the **Participant name** field is cleared when you save or update the template with the Advanced script field selected. ○ **Participant email**- The field from the table associated with the contract template that acts as a placeholder for partici pant email. For example: **Closed by > Email**.

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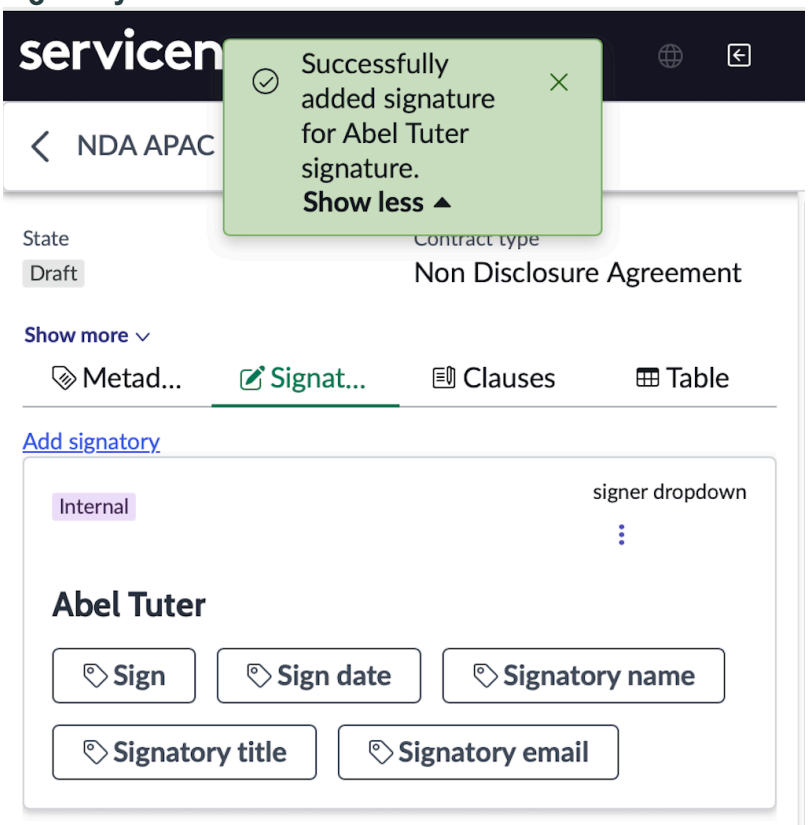
Type of signatory	Available fields
	This field is available only when the signing type is AdobeSign or DocuSign. **Note:** The value in the Participant email field is cleared when you save or update the template with the Advanced script field selected. ○ **Participant title** (Optional) - Option to specify the title when the defined participant is an external user. **Note:** ▪ The value in the Participant title field is cleared when you save or update the template with the Advanced script field selected. ▪ This field is available only when signing type is AdobeSign or DocuSign.

7. Fill in the signatory details and select **Create**.

Signatory card in Word Add-in



- The signatory is added and the signer card is displayed.
- The signatory is marked as internal or external depending on the values provided.
- The signatory added has Sign, Sign date, Sign Title, Sign Name, Sign Email metadata.

8. Add the signatory content controls to the placeholder text for the signature elements.

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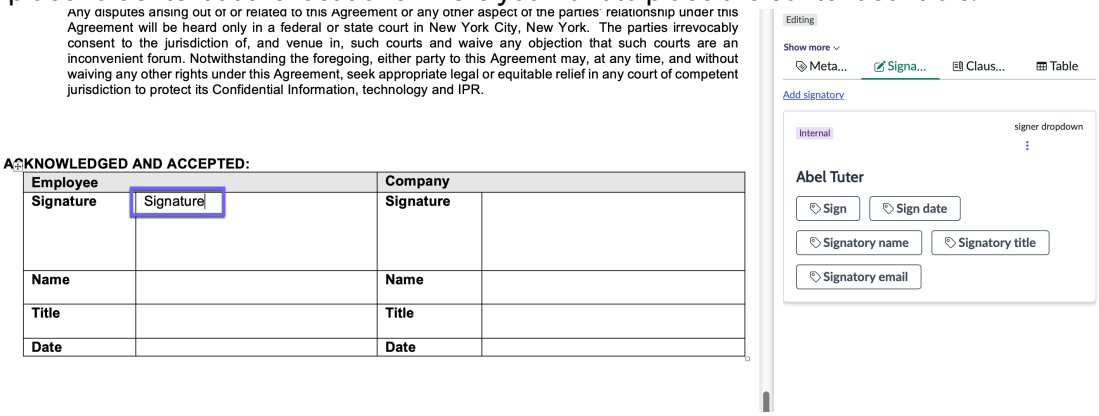
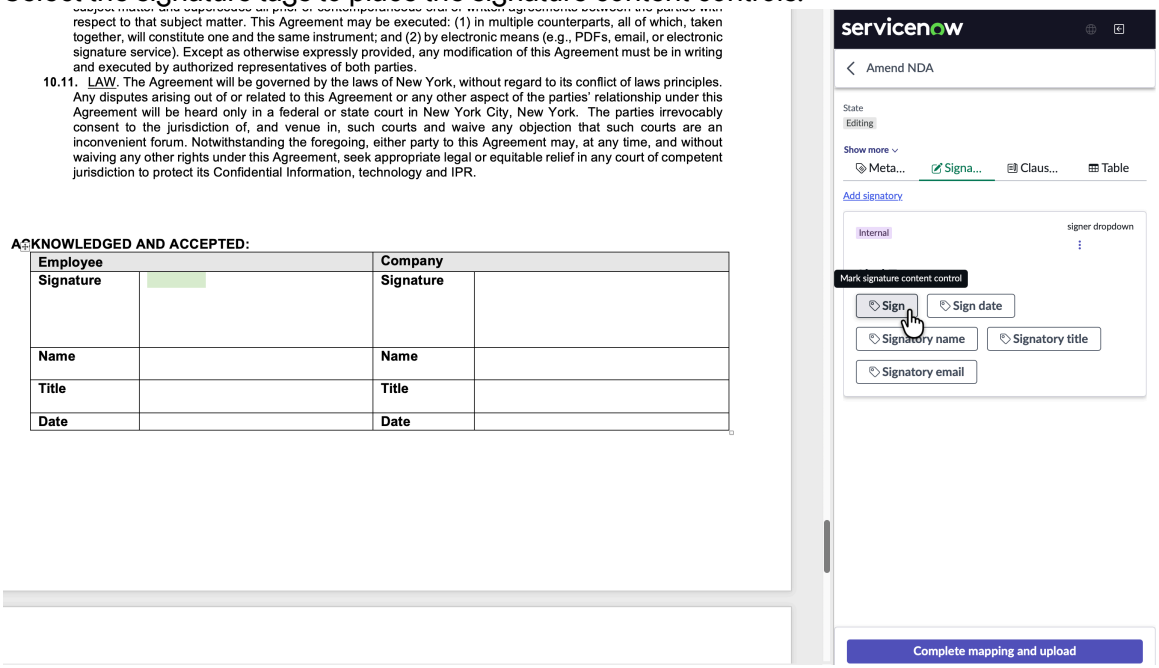
a. Place the cursor where you want the signature to be added.

b. Add placeholder text at the locations where you want to place the content controls.



c. Set the font color of the placeholder text to match the document's background color.

d. Select the signature tags to place the signature content controls.



9. Complete the steps for the other content controls:

- **sign_date**
- **signatory_title**
- **signatory_name**
- **signatory_email**

The signatory fields—such as Name, Title, and Email—are not pre-filled in the contract document before it is sent for signature. These fields will be populated by the electronic signature provider when the signatory access the document to sign it.

10. Optional: View the signatory details by logging in to the ServiceNow instance and navigating to the **Participants** related list of the contract template.

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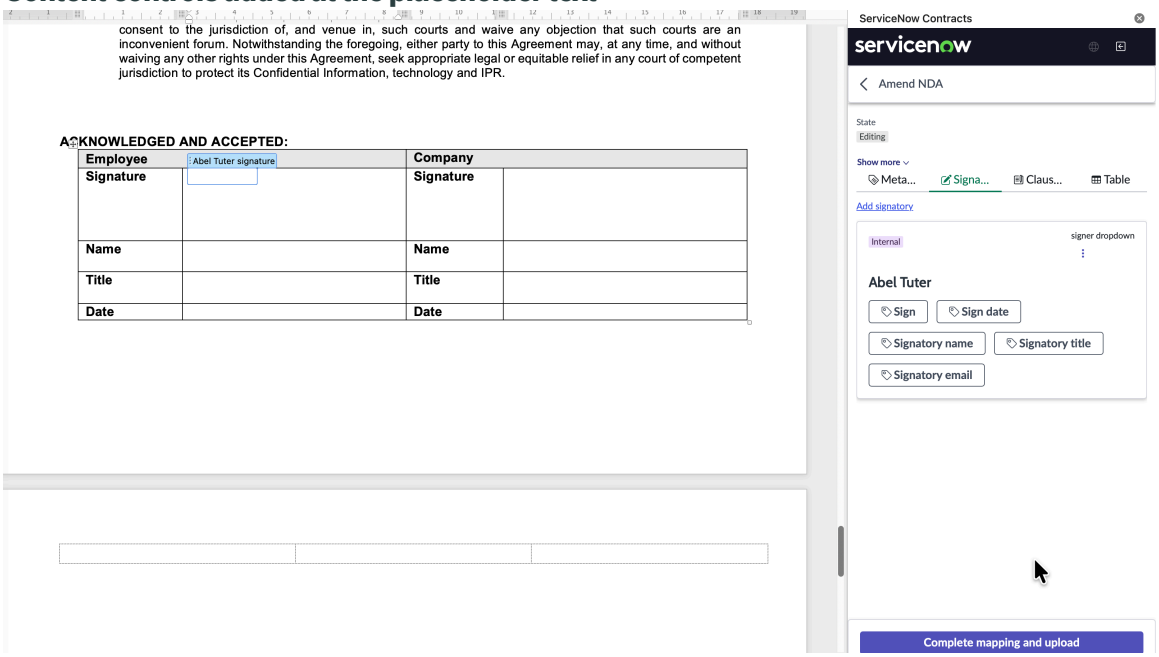
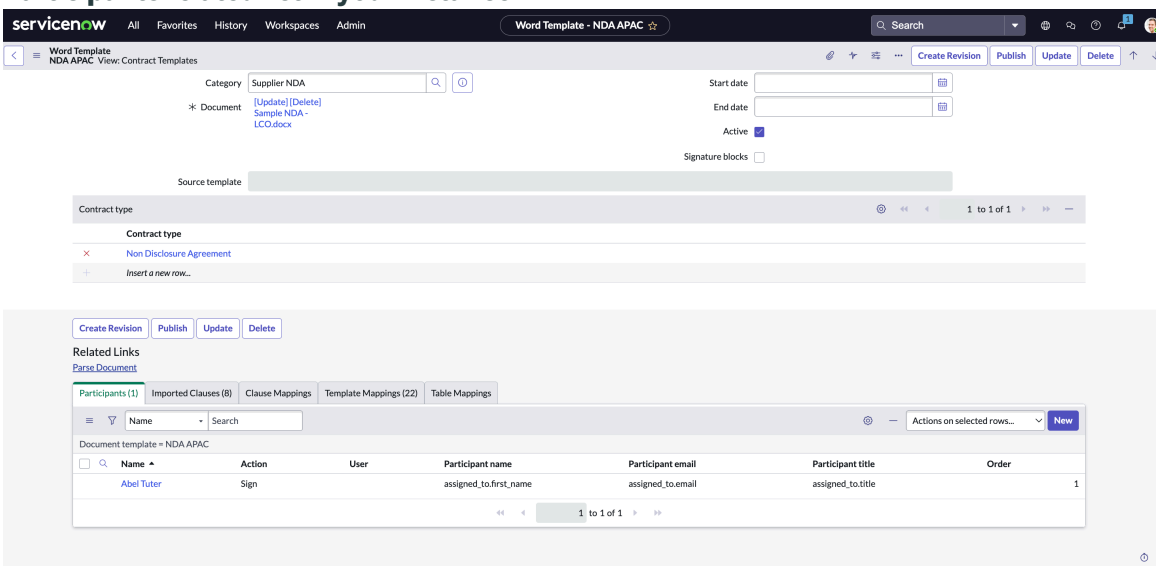
Result

The signatory content controls are added and the metadata is synced to the ServiceNow instance.

Content controls added at the placeholder text



Participants related list in your instance



Add and configure signature blocks using Microsoft Word add-in for ServiceNow Contracts

Add and configure signature blocks in contract templates to define signatories, placeholders for signatures, and other metadata in the contract document. Signature blocks are automatically added in the contract document based on the number of signatories specified in the contract request.

Before you begin

The Microsoft Word add-in for ServiceNow Contracts must be configured. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

An active contract template must exist in the Draft or Editing state where the **Signature blocks** option is selected. For more information, see Create a contract template to contain content controls.

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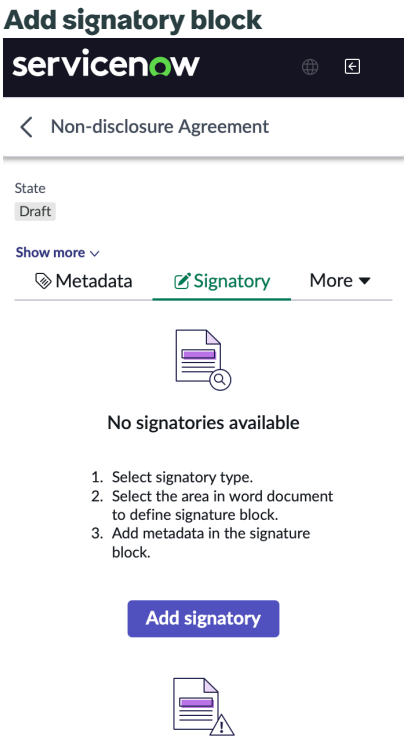
Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open the document in which you want to map the tables using Microsoft Word add-in.
2. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.
3. On the login screen, enter the credentials of the ServiceNow instance for which the Microsoft Word add-in is configured.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. On the add-in screen in the **Templates** tab, select the contract template to which you want to add the signature metadata.
5. In the **Signatory** tab, select **Add signatory**.



6. In the Signatory type section, set the signature type as internal or external, and select **Next**.

   Note: You can create one internal signature block and one external signature block.

7. Define the signature block in the Microsoft Word document.
   a. Select a placeholder in the Microsoft Word document.
   b. Select the signature tag.
   c. Select **Next**.
8. Insert the items you want to display in the signature block.
   While inserting content controls for signatures or signatories, ensure the font color of the tagged text matches the document's background color.
   a. Place the cursor within the signature block.
   b. Select the tag for the metadata you want to add.

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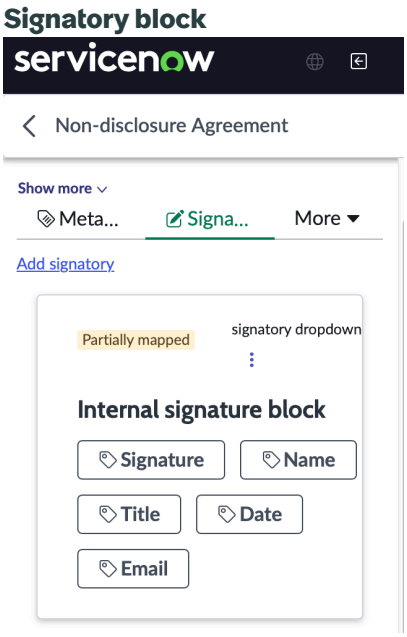
You can add the following metadata:

- Signature
- Name
- Title
- Date
- Email

9. Select **Complete**.



The signatory fields—such as Name, Title, and Email—are not pre-filled in the contract document before it is sent for signature. These fields will be populated by the electronic signature provider when the signatory accesses the document to sign it.

10. **Optional:** View the signatory details by navigating to the **Template Mappings** related list of the Contract template form.

What to do next

Define an internal signatory rule to automatically add signatory details in contract documents using the template. For more information, see Define an internal signatory rule.

Map clauses and clause variations using the Microsoft Word add-in for ServiceNow Contracts

As a contract configurator, add clause and clause variations to a contract using the Microsoft Word add-in for ServiceNow Contracts.

About this task

The following video walks you through the process of mapping clause and clause variations using Microsoft Word add-in for ServiceNow Contracts.

https://player.vimeo.com/video/1158564914?h=06daa1dbf3&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

The Microsoft Word add-in for ServiceNow Contracts must have been configured. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

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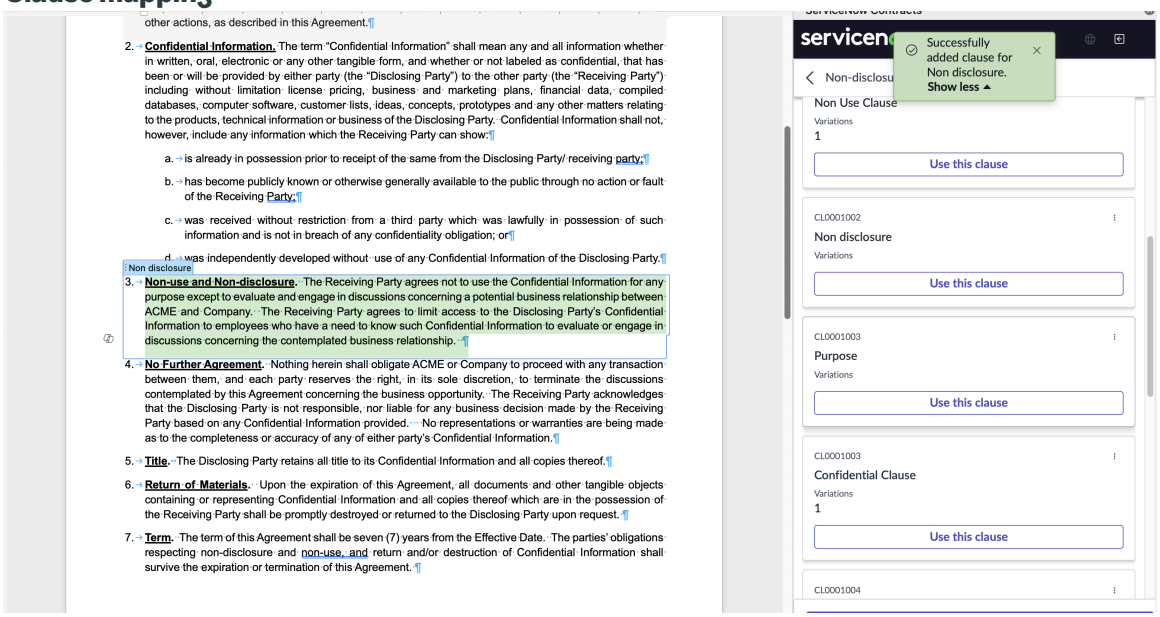
An active contract template in the Draft or Editing state must exist. For more information, see Create a contract template to contain content controls.

Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open the document in which you want to mark the content controls in Microsoft Word.
2. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.
3. In the login screen, enter the credentials of the ServiceNow instance from which you downloaded the manifest file.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. In the **Templates** tab, select the contract template for which you want to add or modify clauses.
5. Navigate to the **Clauses** tab.
   A list of active clauses associated with the table selected in the contract template is displayed.
6. On the Microsoft Word Home ribbon, select the Show/Hide formatting marks icon (¶) to see the formatting symbols.
7. In the Microsoft Word document, select the content to be tagged along with the paragraph ending symbol (¶).
8. Map the content to the clauses by either using an existing clause variation, creating a clause, or creating clause variation.
   A clause cannot be mapped to more than one piece of content.

Clause mapping



Methods for content and clause mapping	Steps
Use the clause as it is and do not update any of the existing clauses or clause variation	In the **Clauses** tab, select **Use this clause** for the clause that you want to use. **Note:** The imported clause is classified as No Change in the ServiceNow instance.

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Methods for content and clause mapping	Steps
Create a clause and do not create any clause variation	**a.** In the **Clauses** tab, select the Create a new clause icon ( ). **b.** In the New clause form, fill in the fields. ▪ **Name** - Unique name for the clause. ▪ **Contract type** - This field is automatically set to the contract type associated with the contract template. **Note:** If the contract type associated with the template is deactivated, the **Contract type** field will be empty. You will be able to select only active contract type in the field. ▪ **Description** - Information about the clause. **c.** Select **Create**. **Note:** ▪ You can manually add more contract types. ▪ No clause variations are created. ▪ The imported clause is classified as Existing Clause in the ServiceNow instance.
Create a clause variation for an existing clause	In the **Clauses** tab, select **Create Variation** for the clause that you want to use. The imported clause is classified as Existing Clause in the ServiceNow instance.

9. **Optional:** Select the **View mapped clauses** toggle switch to see the mapped clauses.

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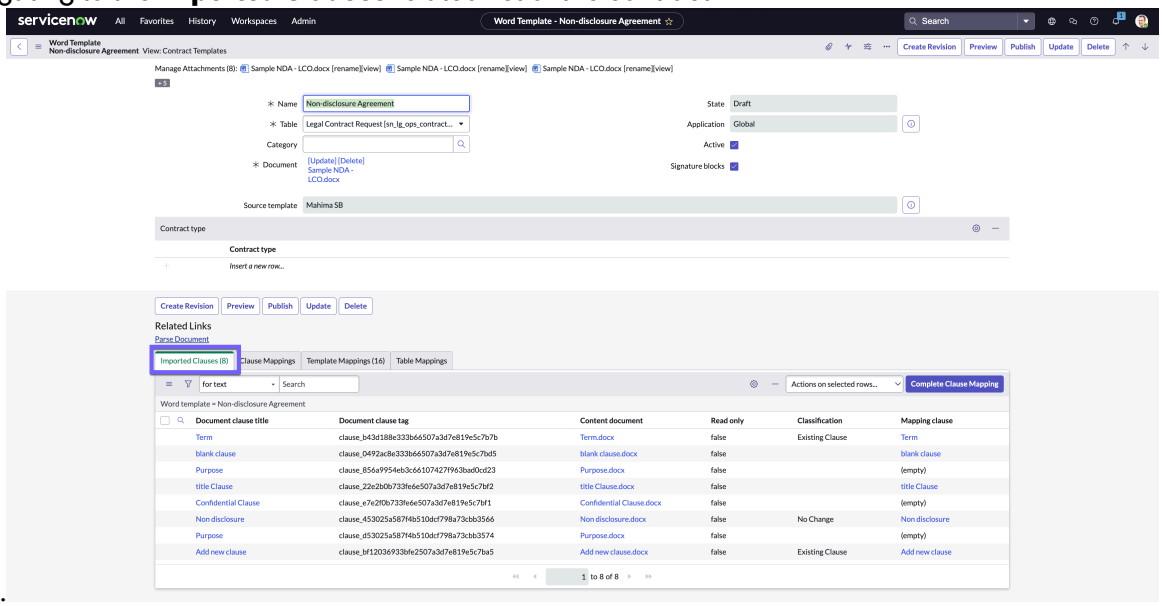
Result

- The selected content is tagged with the clause.
- The clause details are synced to the ServiceNow instance. You can access the clause details by logging to the ServiceNow instance and navigating to the **Imported Clauses** related list of the contract template.



What to do next

Complete mapping and upload Microsoft Word document that includes content controls

Map contract tables using the Microsoft Word add-in for ServiceNow Contracts

Use the ServiceNow Contracts add-in to map a contract table to a source table in your ServiceNow instance to determine the data that will be added in a contract document. When a contract document is generated from the template, the rows and columns are dynamically added in the mapped table of the contract document.

Before you begin

The Microsoft Word add-in for ServiceNow Contracts must be configured. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

An active contract template must exist in the Draft or Editing state. For more information, see Create a contract template to contain content controls.

Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open the Microsoft Word document in which you want to map tables.
2. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.
3. On the login screen, enter the credentials of the ServiceNow instance for which the Microsoft Word add-in is configured.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. In the **Templates** tab of the Microsoft Word add-in screen, select the contract template to which you want to map the data source table.
5. In the **Table** tab, create a table mapping for the template.

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- For a first table mapping, select **Configure table mapping**.
- For subsequent table mappings, select the add icon + beside the search bar.

6. In the **Table mapping details** section, configure the details for the data source table from which you want to add data in the contract document.

   a. In the **Parent request table**, select the source table from which contract request is created.

   > **Note:** The field appears only when Contract Request table [sn_cm_core_contract_request] is selected when creating the contract template.

   b. In the **Table** field, select the data source table from which you want to add data in a contract document.

   c. **Optional:** In the **Name** field, either retain the default name or enter a unique table name.

   d. In the **Record identifier** field, select a table field to determine which records are added to the contract document.
   For example, if you have selected the Quote Line Item table and you want to include data only from the Quote record that initiated the contract, you would select the **Quote** field.

   e. In the **Table Columns** field, select the columns of the data source table that you want to map to the contract template.

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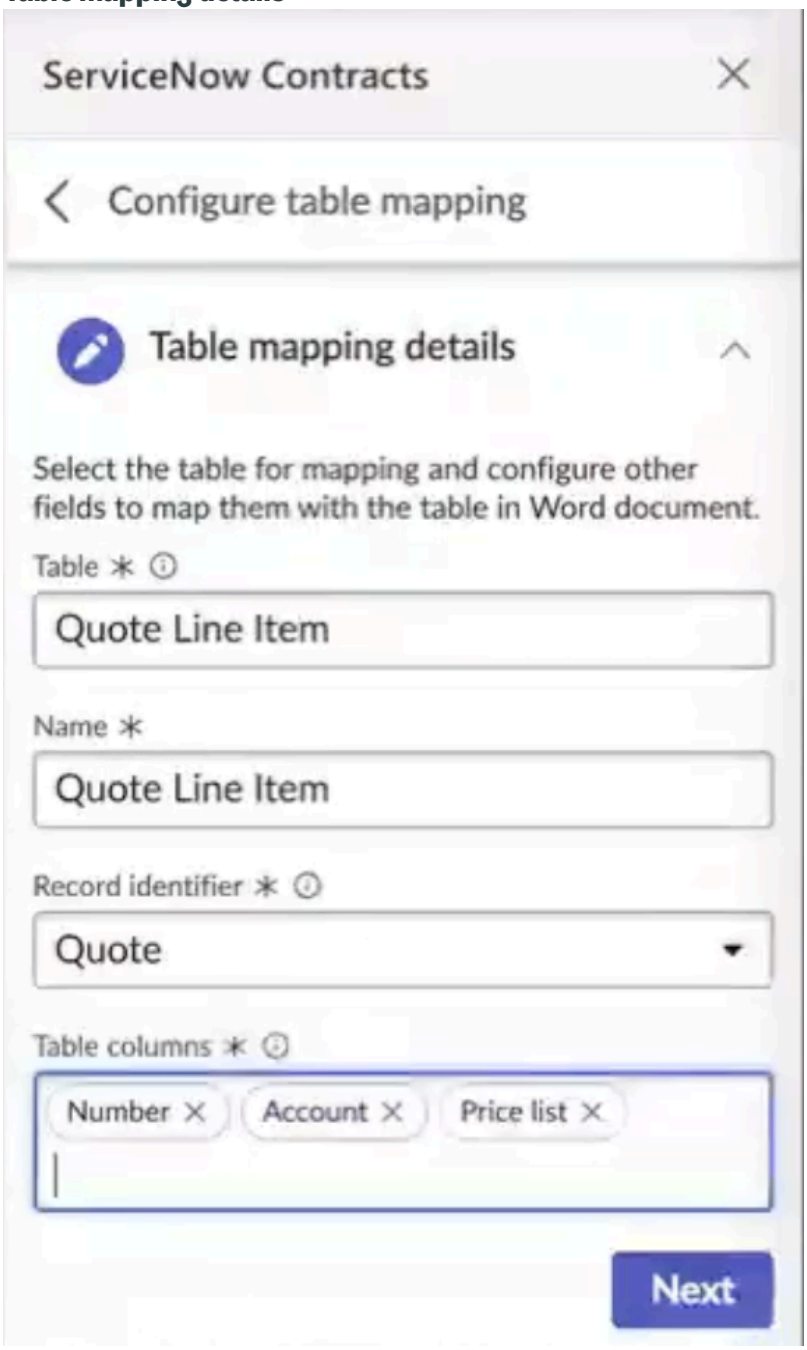
f. Select **Next**.

Table mapping details



7. In the **Table display configuration** section, set the display properties to define how the data appears within the table in the contract document and then select **Next**.

Field	Description
Sort by	The criteria by which to sort the data.
Sorting order	Sorts the data either in ascending or descend ing order.
Enable hierarchy	Option to group the data based on par ent-child relationships.

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Field	Description
Parent field	The parent field for the hierarchy view. This field appears only when **Enable hierar chy** has been selected.
Hierarchy column(s)	The columns for which data should be dis played in the hierarchy view. This field appears only when **Enable hierar chy** has been selected.
Row indentation	The number of spaces that child columns should be indented. This field appears only when **Enable hierar chy** has been selected.

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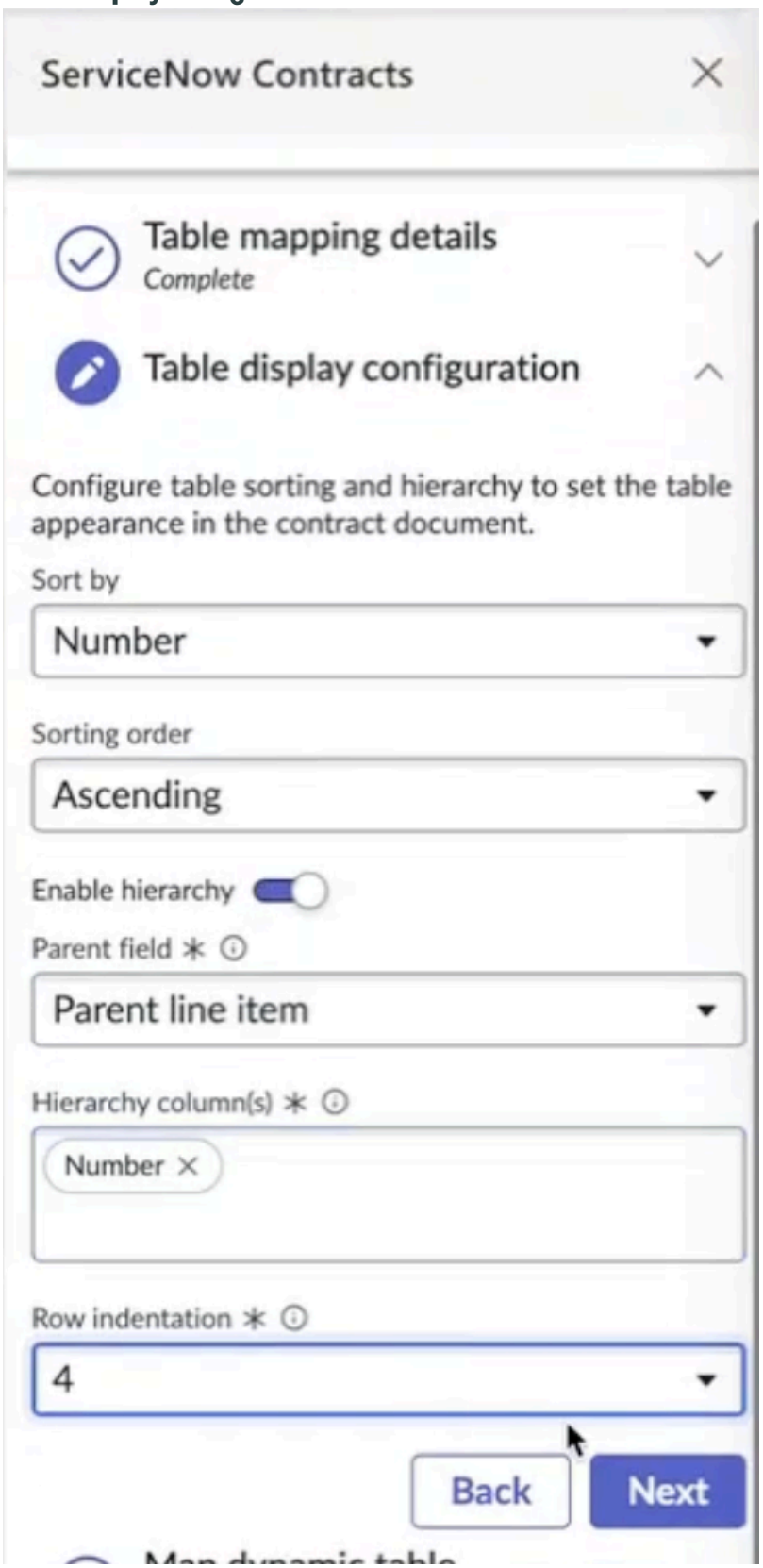
Table display configuration



8. Display the formatting symbols by selecting the Show/Hide formatting marks icon (¶) on the Microsoft Word Home ribbon.

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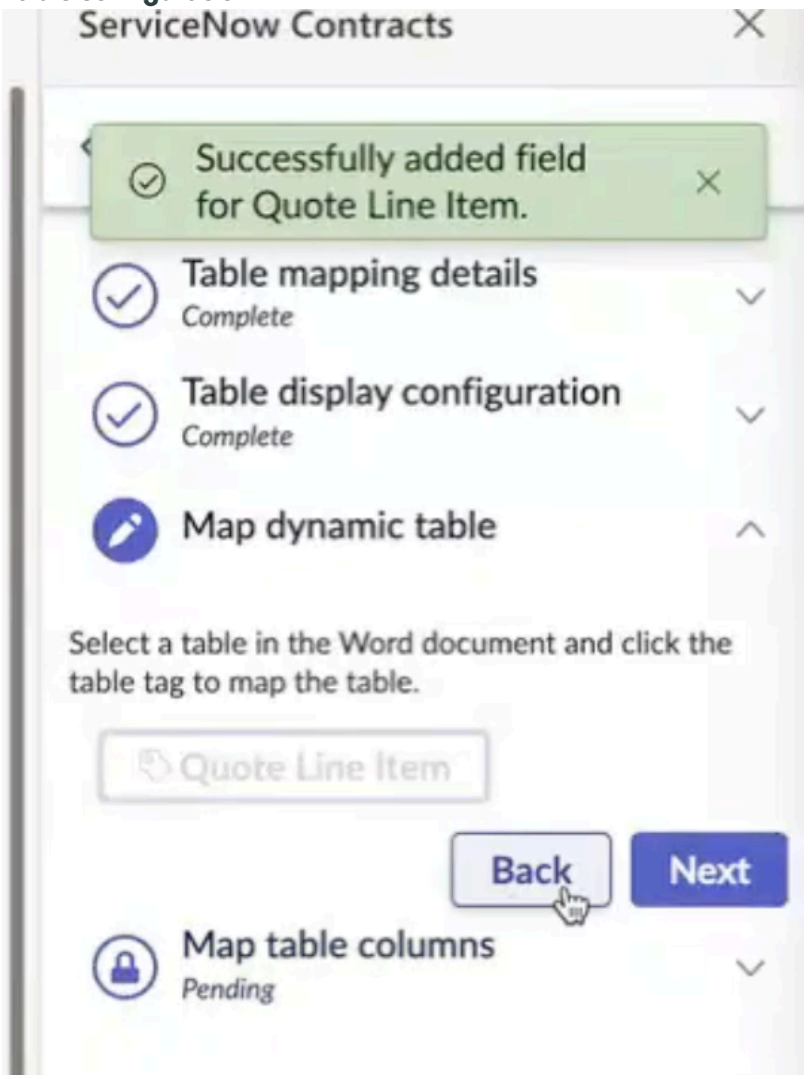
9. Initiate the table mapping in the contract template by selecting it along with the paragraph symbol (¶), and then selecting the table tag in the **Map dynamic table** section.
10. Select **Next**.
11. Map the columns in the contract template table by selecting a column in the mapped table and then selecting the appropriate column tag in the **Map table columns** section.
12. Select **Complete**.

Table configuration

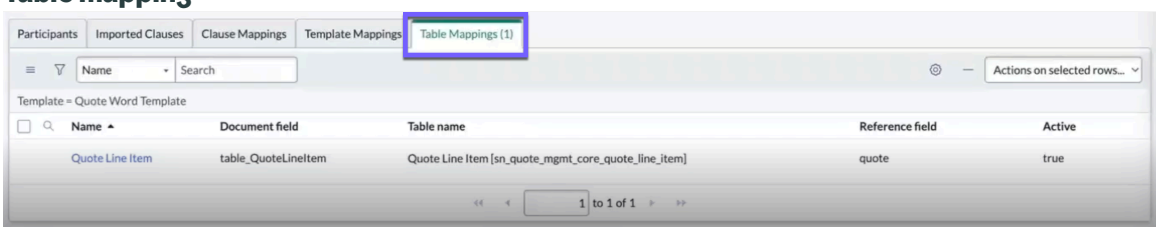


Result

The table mapping is completed and is listed under the **Table** tab on the add-in panel.

The table mappings are synced to the ServiceNow instance.

Table mapping



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You can add conditions for the table mapping to filter for the data that appears in the contract. For more information, see Add conditions for a table mapping.

Add conditions for a table mapping

As a contract configurator, use condition builders to define criteria for a table mapping in a contract template so only the essential data from the mapped table is displayed in the contract document.

Before you begin

- Map tables in Microsoft Word document using the Microsoft Word add-in for ServiceNow Contracts. For more information, see Map contract tables using the Microsoft Word add-in for ServiceNow Contracts.
- Upload and parse the document with the content controls. For more information, see Complete mapping and upload Microsoft Word document that includes content controls.
- Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. From the list, open the contract template for which you want to add table mapping conditions.
3. In the Table Mappings related list, select the mapping.
4. In the **Condition** field, define a condition for the table mapping.
   For more information, see Create a condition statement using the condition builder.
5. Select **Update**.

Configure mapped columns to append or add fields from related tables

Configure dynamic tables in a contract template to display additional data from related table fields by appending it to existing columns or adding it as new columns.

About this task

As a contract configurator, you can add scripts for configuring the mapped table columns in a contract template to include additional fields from related tables. You can choose to either append this information to an existing column or add it as a new column.

Before you begin

- Map tables in Microsoft Word document using the Microsoft Word add-in for ServiceNow Contracts. For more information, see Map contract tables using the Microsoft Word add-in for ServiceNow Contracts.
- Upload and parse the document with the content controls. For more information, see Complete mapping and upload Microsoft Word document that includes content controls.
- Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. From the list, open the contract template for which you want to add table mapping conditions.
3. In the Table Mappings related list, select a mapping.
4. In the Column Mapping related list, select a column.
5. In the Column Mapping form, select the **Advanced script** check box.
   The **Script** field appears.

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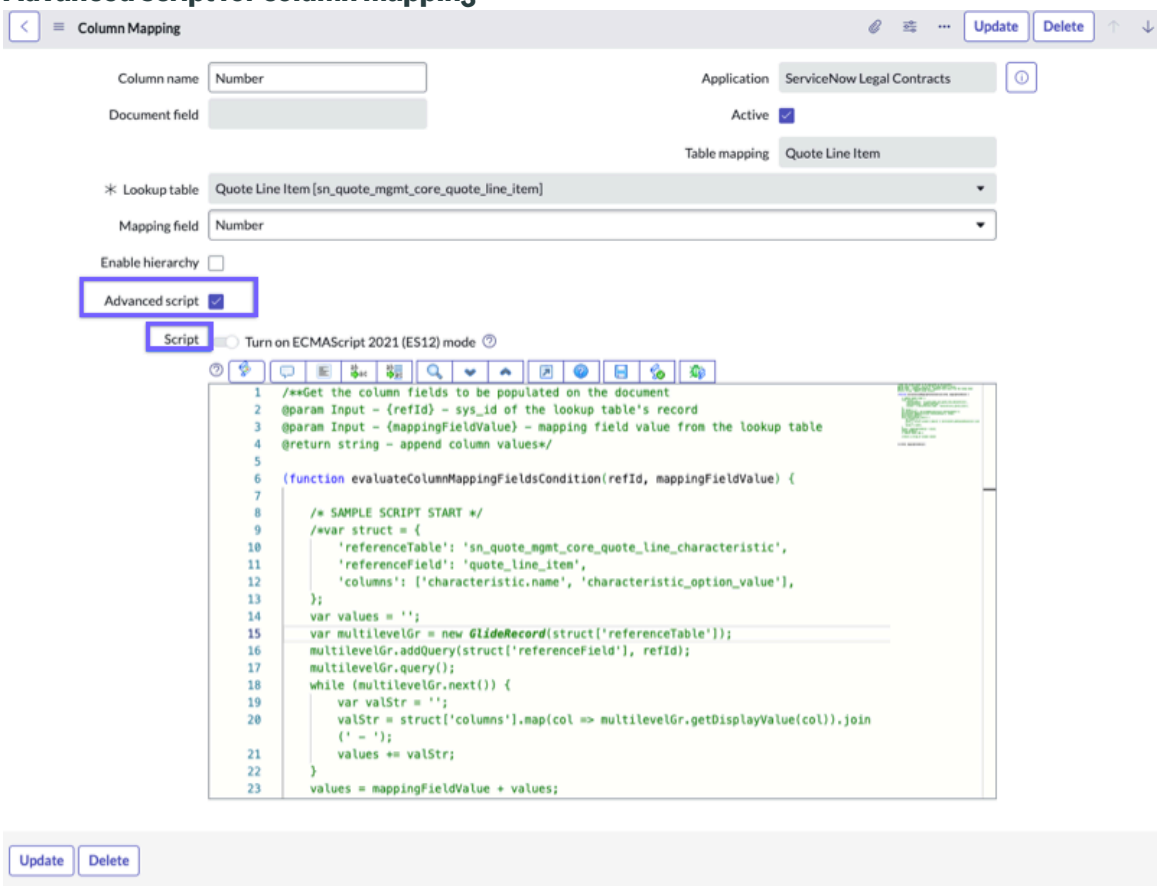
Advanced script for column mapping



6. In the **Script field**, add the script to include additional fields from related tables.
7. Select **Update**.
8. In the Table Mapping form, select **Update**.

Result

The additional fields will be appended to a column or added as a new column in the contract document that is generated using this template.

Complete mapping and upload Microsoft Word document that includes content controls

As a contract configurator, after adding the content controls to the Microsoft Word document to be used for the contract template using the Microsoft Word Add-in for ServiceNow Contracts, upload the document to the ServiceNow instance.

Before you begin

Add metadata, signatory details, and content controls for the clauses before uploading the document. The uploaded document is parsed for the content controls and data populated into the ServiceNow instance. For more information, see Add document content controls using Microsoft Word add-in for ServiceNow Contracts

Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open the document in which you have added content controls in Microsoft Word.
2. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.

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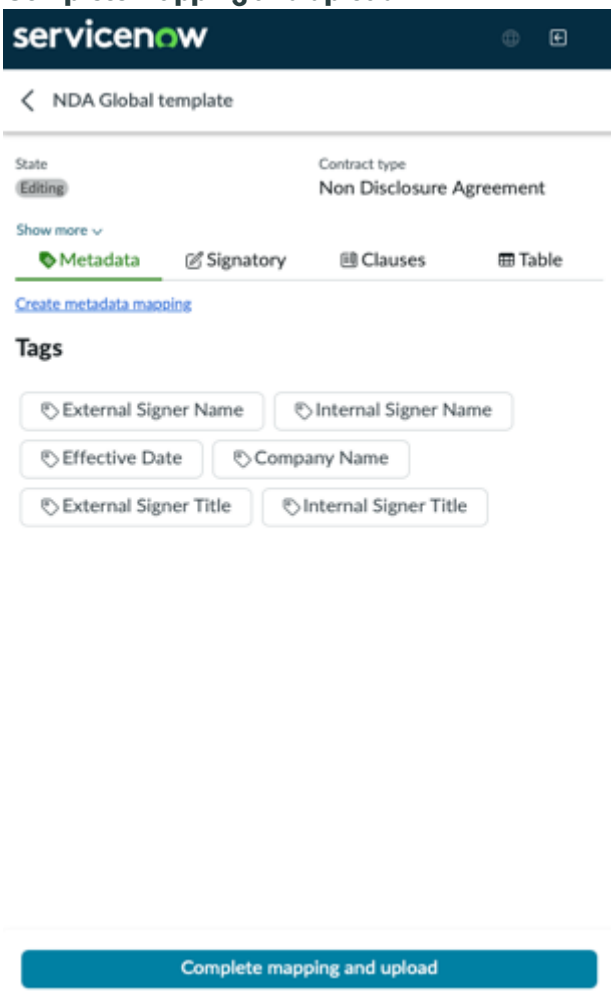
3. In the add-in login screen, enter the credentials of the ServiceNow instance from which you downloaded the manifest file.
4. Select the contract template for which you want to upload the document.
5. Select **Complete mapping and upload**.

Complete mapping and upload



6. On the confirmation screen, select **Complete mapping**.
   The contract document is uploaded and the content controls are parsed. The ServiceNow instance is updated with the data from the contract document.

What to do next

Complete clause mapping to build a clause library.

Complete clause mapping to build a clause library

As a contract configurator, complete clause mapping to build a clause library of clause variations containing the content marked in the Microsoft Word document using the Microsoft Word Add-in for ServiceNow Contracts.

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Before you begin

- Ensure that the application scope is set to **Global**. Otherwise, do the following:
  1. Select the Application scope icon ( ) on the top-right corner.
  2. In the drop- down, select the option consisting **Application scope**.
  3. In the filter navigator, search and select **Global**.
- Map clause and clause variations in the Microsoft Word document using the Microsoft Word Add-in for ServiceNow Contracts. For more information, see Map clauses and clause variations using the Microsoft Word add-in for ServiceNow Contracts
- Upload and parse the document with the content controls. For more information, see Complete mapping and upload Microsoft Word document that includes content controls.

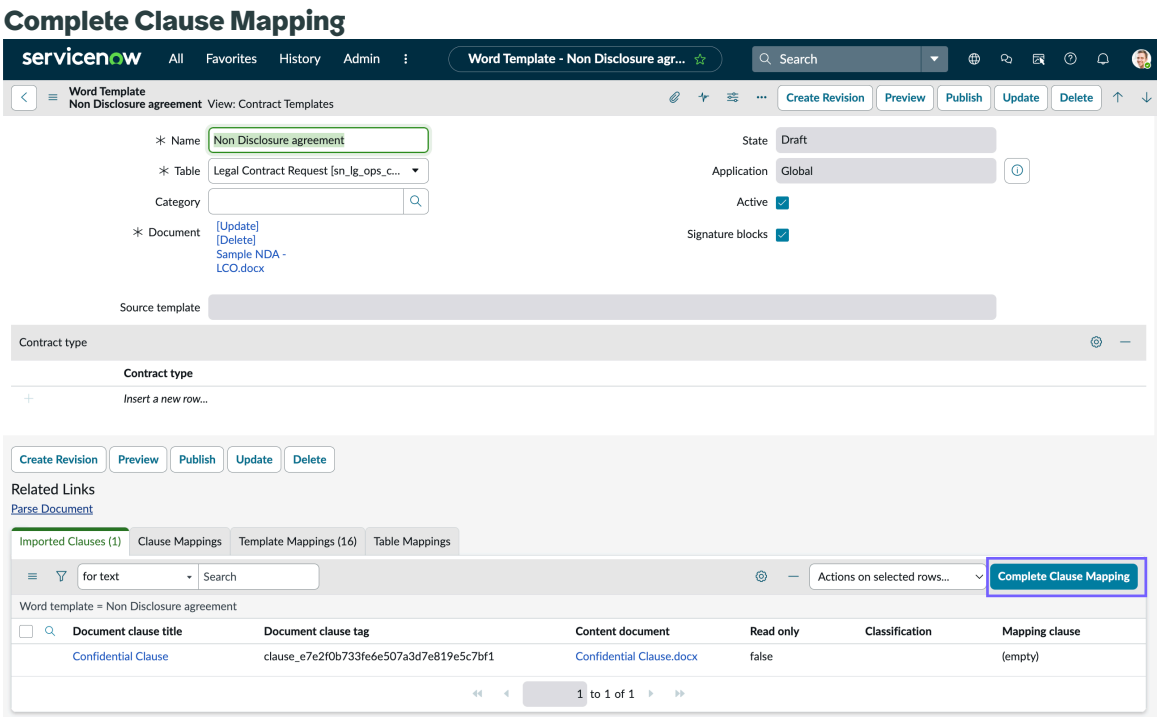
Role required: sn_cm_core.contract_config

About this task

Clauses that are imported from the Microsoft Word document are used to build a clause library of clause variations.

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. From the list, open the contract template for which you want to complete the clause mapping.
3. Navigate to the Imported clauses related list.
4. Select **Complete Clause Mapping**.



   - If the mapping is successful, the Clause Mappings related list displays the details of mapped clauses with their contract type.
   - If the mapping is not successful, an error message appears. Possible causes could include:

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- No contract type was selected.
- All clauses were not assigned a classification.
- Clauses classified as New clause were mapped to a clause instead of being empty.
- Clauses classified as Existing clause or No change don't have a clause mapped to them.

5. Select **Update** to save the contract template.
6. **Optional:** View the clause variations associated with a clause by selecting the Display/hide hierarchical lists icon ( ) for the clause.

Create contract template by manually adding content controls

Create contract templates by adding content controls manually.

Add content controls in a Microsoft Word document

As a contract configurator, prepare a Microsoft Word document that you want to import as a contract template by marking the content with content controls so it can be efficiently parsed and reused.

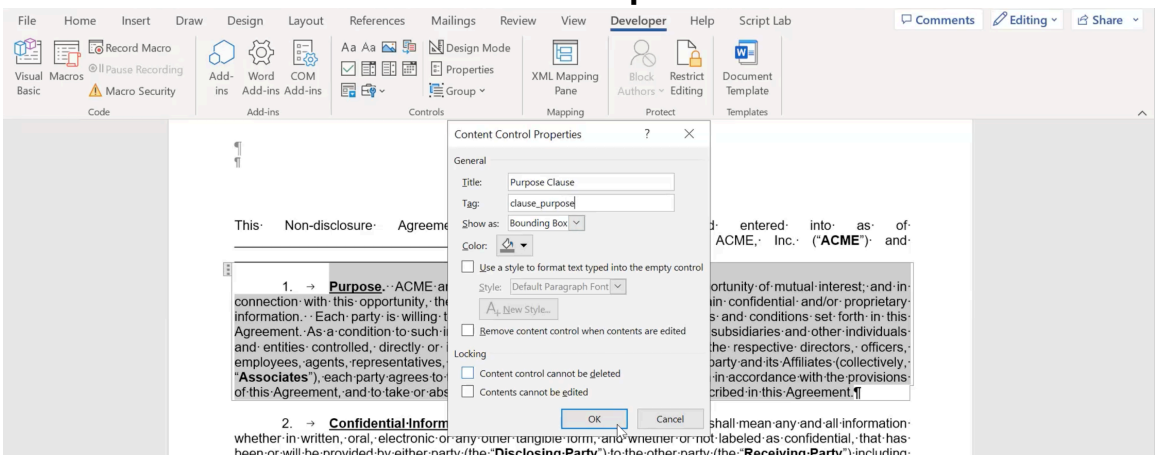
Before you begin

Ensure that you are on a Windows system to add content controls in a Microsoft Word document.

Role required: sn_cm_core.contract_config

Procedure

1. In Microsoft Word, open the document that you want to import as a contract template.
2. On the Microsoft Word Home ribbon, select the Show/Hide formatting marks icon (¶) to see the formatting symbols.
3. Display the **Developer** tab in Microsoft Word.
   For more information, see the Show the Developer tab topic in the Microsoft Office 365 documentation.
4. Select the content to be tagged.
5. Select **Plain Text Content Control** from the **Developer** tab.



6. Select the **Properties** option from the **Developer** tab.
7. In the **Content Control Properties** dialog box, enter a title for the content control.
8. Enter a tag value.

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Note:

- The tag names are not case sensitive. If there are two tag names as clause_PURPOSE and clause_purpose, both will be treated same.
- The maximum character limit for the tag is 200.
- When inserting content controls for signatures or signatories, ensure the font color of the tagged text matches the document's background color.

Tag names contain a prefix with the content control type.

Supported content control types

Content control type	Description
field_	Indicates metadata.
clause_	Indicates a clause.
signature_	Indicates a signature.
sign_date_	Indicates the signing date.
signatory_name	Indicates the name of the signatory.
signatory_email	Indicates the email of the signatory.
signatory_title	Indicates the title of the signatory.

9. Select **OK**.

Create a contract template

Create a contract template that can be used to generate a standard contract with predefined content when an employee submits a contract request.

Before you begin

Role required: sn_cm_core.contract_config

If you are creating a contract template for a non-task table, ensure that the non-task table is added in the extension script. For more information, see Configure non-task tables for contract templates.

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
   The Word Templates page opens in the Contract Templates view by default.
2. Select **New**.

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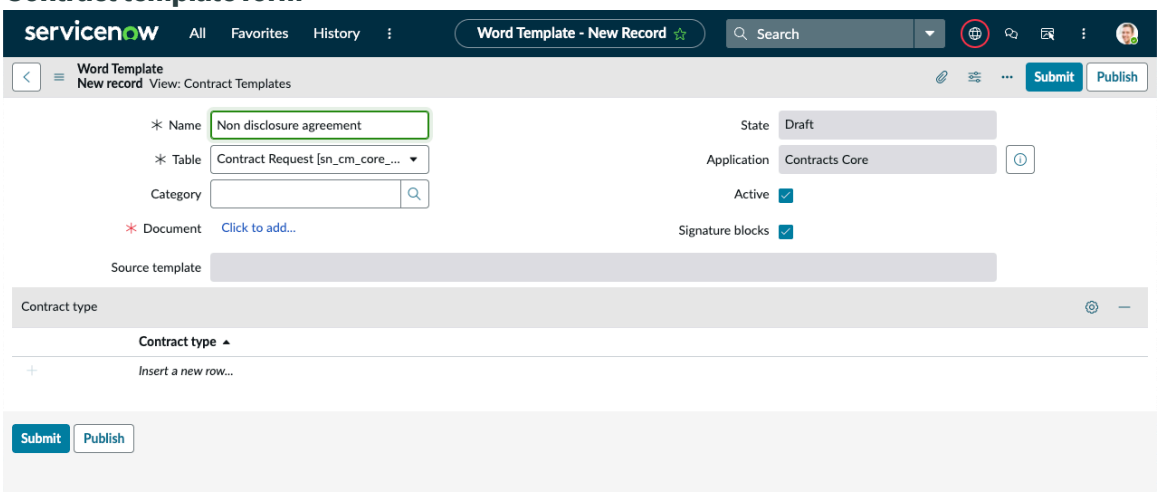
Contract template form



3. On the form, fill in the fields.

Word Template New Record form

Field	Description
Name	Unique name for the contract template.
Table	Table to which you want to associate the contract template.
Category	Document category to which you want to associate the contract template.
Document	The document from which you want to import clauses and template field mapping. The selected document should be a Microsoft Word (.docx) document and should have valid content controllers. For more information, see Add content controls in a Microsoft Word document.
State	Current state of the document template. ○ **Draft**: Indicates that the document template is not yet published. ○ **Editing**: Indicates that the document template is being edited after it has been published. ○ **Published**: Indicates that the document template can be consumed by services and cases.
Application	Application to which the contract template belongs. This field is automatically set to the application scope in which you're creating the contract template.
Active	Option to make the template active and available for use.
Start date	Date on which the Word document template becomes valid. Providing a start date helps when maintaining multiple versions of same template. This field is available only when **Category** is selected.
End date	Date until which the Word document template is valid. Providing an end date helps when maintaining multiple versions of same template.

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Field	Description
	If the values in the **Start date** and **End date** fields are empty the template will always be valid. **Note:** If you specify an end date, you must also specify a start date. This field is available only when **Category** is selected.

When the document is selected, the Participants, Imported Clauses, Clause Mappings, and Template Mappings related list appear.

4. In the **Contract Type** field, select only one category of the contract type.
   If you're creating a template for non-disclosure agreement, select **Non Disclosure Agreement** as the contract type.
5. Select **Parse Document** to extract the content marked by content control from the imported document.
   - The content controls that have *clause_* as prefix are derived from the document and listed under the Imported clauses related list.
   - The content controls that have *field_*, *signatory_*, *signature_*, and *sign_* as prefix are derived from the document and listed under the Template mappings related list.
6. Select **Save**.

Result

The contract template is saved in the Draft state.

What to do next

1. To add participants with whom you must obtain signatures, see Create and configure participants.
2. To insert signatures, open a **Signature_** record in the **Template mappings** related list. For more information, see Update contract template mappings
   a. In **Document field type**, specify `Signature`.
   b. In the **Participant** field, specify the participant with whom you require the signature.
   c. Select **Update**.
   Similarly, update the following records.
   - Sign
   - Sign date
   - field
   - Signatory name
   - Signatory email
   - Signatory title

   For a full list, see Add content controls in a Microsoft Word document
3. Select **Publish**.

Create and configure participants

Add and configure participants that act as placeholder for users who will be assigned as signers of a contract document.

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Before you begin

A Microsoft Word document must have been uploaded and parsed to provide clauses for the contract template. For more information, see Create a contract template.

Role required: sn_cm_core.contract_config

Before you begin

- Role required: sn_cm_core.contract_config

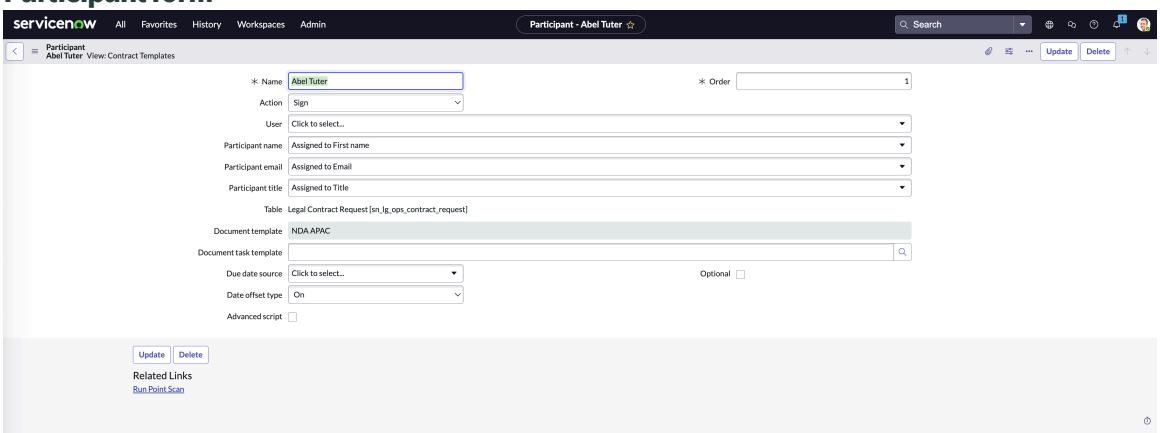
Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template.
3. In the **Participants** related list, click **New**.
4. On the form, fill in the fields:

   For description on the field values, see Participant form for contract templates.

   For more information on content controls, see Add content controls in a Microsoft Word document.

Participant form



5. Click **Submit**.

Result

The participant is added to the document template.

Participant form for contract templates

Use the Participant form to add participants in a contract template.

Participant form

Field	Description
Name	Display the name of the mapped participant.
Action	Type of action to be performed by the participant such as **Sign**.
Order	Order in which a task has to be initiated for the participant to complete the action.
User	Mapping the user field to a participant.

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Participant form (continued)

Field	Description
	Note: • When you select a value, the participant is considered to be an internal user. When the Participant Name and Participant Email fields (optional for internal user) are filled along with the User field, the electronic signature task is sent to Participant Name and Participant Email, not the Name and Email from the User field. When you do not select a value in the User field, the participant is considered an external user (Participant who does not have access to ServiceNow system). For such participants, specify Participant Name, Participant Email, and Participant Title. • The value in the User field is cleared when you save or update the template with the Advanced script field selected.
Participant name	Option to specify the name when the defined participant is an external user. **Note:** • Participant name and participant email are mandatory when you do not select a value in the **User** field. • The value in the Participant name field is cleared when you save or update the template with the Advanced script field selected. • This field is available only when signing type is AdobeSign or DocuSign.
Participant email	Option to specify an email address when the defined participant is an external user. **Note:** • Participant name and participant email are mandatory when you do not select a value in the **User** field. • The value in the Participant email field is cleared when you save or update the template with the Advanced script field selected. • This field is available only when signing type is AdobeSign or DocuSign.
Participant title	Option to specify the title when the defined participant is an external user. **Note:** • The value in the Participant title field is cleared when you save or update the template with the Advanced script field selected. • This field is available only when signing type is AdobeSign or DocuSign.
Table	Table (sys_user table or any table extending sys_user table) from which you choose to populate the variables.
Document template	Name of the document template.

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Participant form (continued)

Field	Description
Document task template	Template selected on the Document Template task table to populate additional details for the document task, such as description and short description for fill, sign and review tasks. **Note:** If additional details are not defined, the default values of the template are used in the document template task.
Due date source	Due date for the document task that is created for that participant.
Date offset type	Due date for the document task is picked from the task record. Additionally, you can offset the due date by days, weeks or months.
Advanced script	Option to display the Script field.
Script	Script indicating the participant conditions with User ID, Participant name, Participant email, and Participant title. This field is enabled only when the Advanced script field is selected.
Optional	When enabled, a participant will be skipped if the participant user and participant email is not available. This check is done during runtime only and not while configuring the template.

Classify and map imported clauses

Classify and map imported clauses to use the content from the clauses in a contract template.

Before you begin

A Microsoft Word document must have been uploaded and parsed to provide clauses for the contract template. For more information, see Create a contract template.

Role required: sn_cm_core.contract_config

About this task

The imported clauses contain content that have been extracted from the Microsoft Word document that are marked by the content controls. Classifying and mapping the imported clauses builds a clause library of clause variations containing the content available in the imported clauses.

For more information on clause variations, see Create a clause variation.

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template.
3. Navigate to the Imported clauses related list.
4. Either update an existing clause variation with the content available in the imported clause or create a new clause or clause variation with that content.

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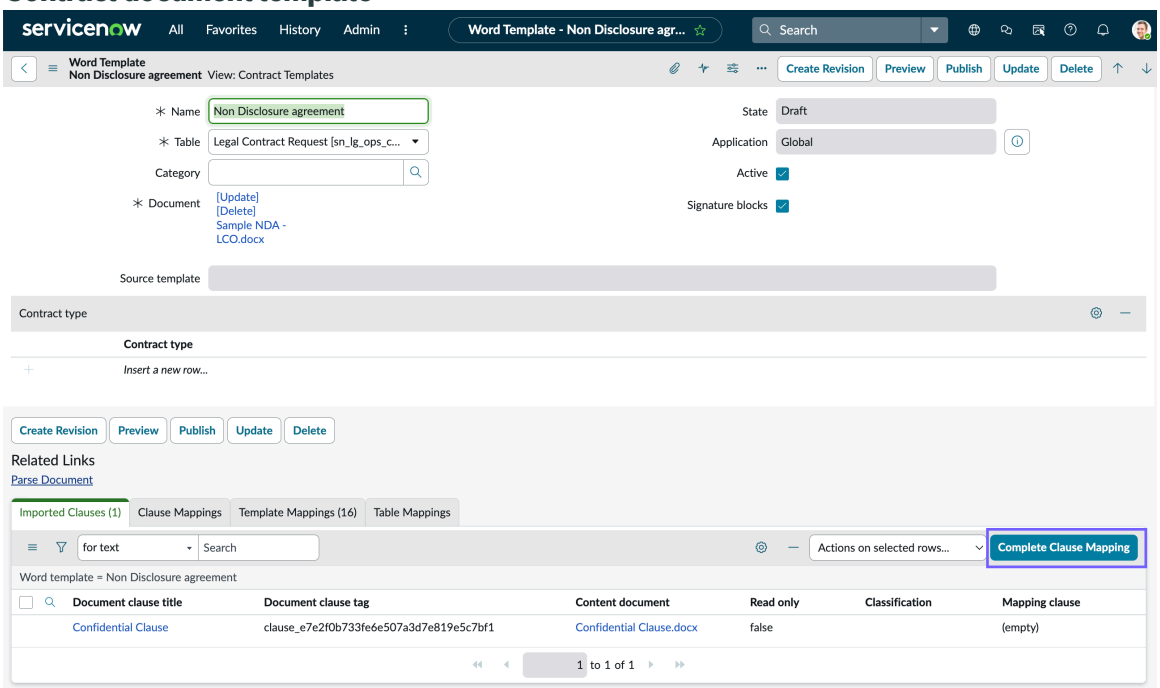
Usage of the imported clause data	Steps
Do not update any of the existing clause or clause variation	**a.** In the **Classification** field, select the drop down arrow. **b.** Select **No change** from the list. **c.** In the **Mapping clause** field, select an ac tive clause from the clause library.
Create a new clause and its clause variation	**a.** In the **Classification** field, select the drop down arrow. **b.** Select **New Clause** from the list. **c.** In the **Mapping clause** field, do not take any action.
Create a new clause variation	**a.** In the **Classification** field, select the drop down arrow. **b.** Select **Existing Clause** from the list. **c.** In the **Mapping clause** field, select an ac tive clause from the clause library.

5. Select **Complete Clause Mapping**.

Contract document template



- If the mapping is successful, the Clause Mappings related list displays the details of mapped clauses with their contract type.
- If the mapping is not successful, an error message appears. Possible causes could include:
  - No contract type was selected.
  - All the clauses were not assigned a classification.

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- Clauses with the classification of New clause were mapped to a clause instead of being empty.
- Clauses with the classifications of Existing clause or No change don't have a clause mapped to them.

6. **Optional:** View the clause variations associated with a clause by selecting the Display/hide hierarchical lists icon (for a clause.

Update contract template mappings

Update template mappings to pre-fill information that's placed in the contract document.

Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template.
3. Navigate to the Template mapping related list.
4. Select the field to update.
5. On the form, fill in the fields.

Template Mapping form

Field	Description
Field name	This field is automatically populated with the title of the content control. For example: Company
Document field	This field is automatically populated with the tag of the content control. The field has the field type prefixed to the name. For example: field_companyName.
Document field type	The type of field being mapped. The choices are: ○ Text Field: Descriptive metadata. ○ Signature: Signatures during the electronic signature process. ○ Signature date: Date of the signing. ○ Signatory name: Name of the signatory. ○ Signatory email: Email of the Signatory. ○ Signatory title: Title of the signatory. **Note:** ○ These options are available when the template is contracts-related for Contract Management Pro. ○ Ensure you have mapped Signature and Signature date to the participants and delete any unmapped Signature and Signature date fields.

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Field	Description
Preview value	A field mapping value used instead of the placeholder when testing the template. This field appears only when **Text field** is selected from **Document field type**.
Format	Format in which values are to be entered by the participant. If the participant doesn't enter a value in the specified format, a validation error appears for the participant.
Read Only	Option for enabling the editing of the field by the selected participant.
Active	Option for activating the template mapping.
Mapping table	This field is automatically set to the table to which the document template is associated.
Mapping field	Mapping field used to map the values from the table field that is inserted when this template is used in a contract. This field appears only when **Text field** is selected from **Document field type**.
Participant	Select the participant associated with the contract template. While creating of participants, ○ To create an internal signer, map user reference to the participant record, for example, P1. ○ To create an external signer, map the Participant name, Participant email, and Participant title fields in the participant record. When you map a participant to signatory name, email, and title fields in the template mappings, the participant record mapped value to the participant name, email, and title fields in the signer tasks. **Note:** When the template has a signatory rule, the signer mapping under the signatory rule takes precedence over the user mapping in participant record.
Advanced script	Option to display the Script editor.
Script	The script configuring the mapping between fields and record producer variables. This field is enabled only when the **Advanced script** field is selected.

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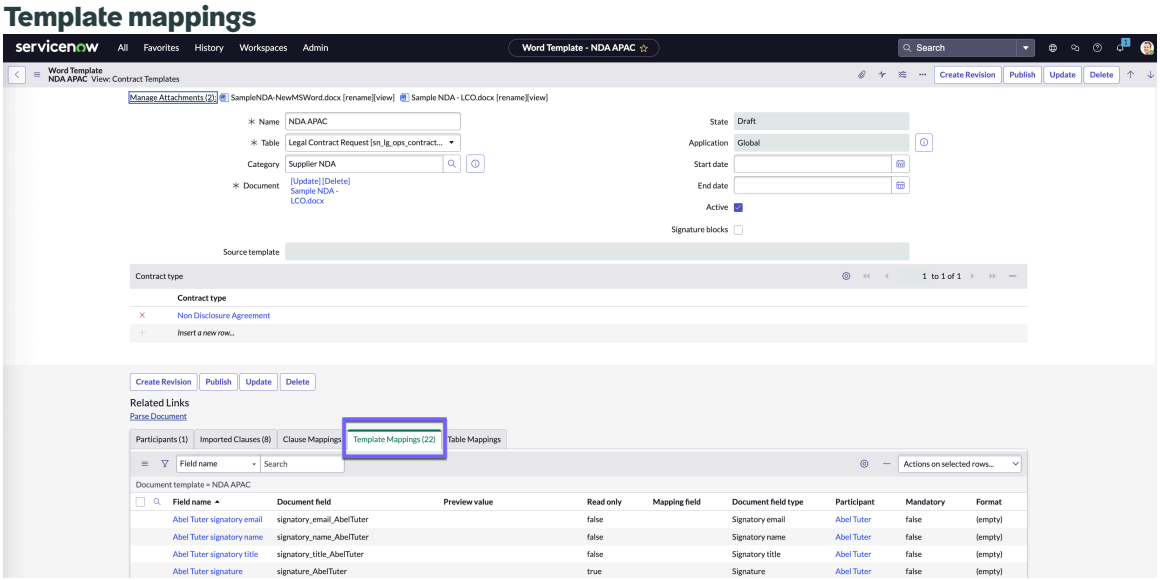
6. Select **Update**.



Publish a contract template

Publish a contract template to make it available for generating a standard contract document with predefined content when a contract user submits a request.

Before you begin

Ensure that the clause mapping has been completed before you publish a contract template with clauses. For more information, see Complete clause mapping to build a clause library and Classify and map imported clauses.

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Template**.
2. Open a contract template.
3. **Optional:** Review the contract document.

   a. Generate and preview the contract document.
   For more information, see Generate and preview a contract document from a template.

   b. If any changes are necessary, update the document and save it.

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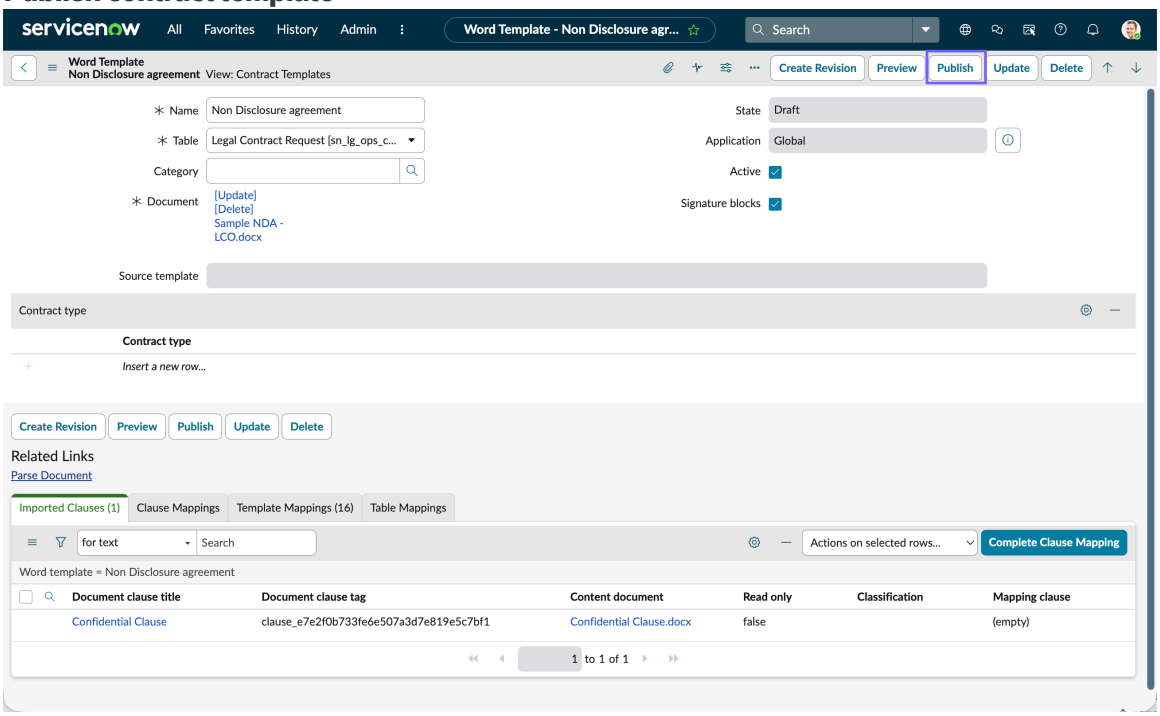
4. On finalizing the content of the contract document, select **Publish**.

Publish contract template



Result

The contract template is published.

Note: If the contract type associated with the contract template is deactivated when the contract template is in the Draft or Editing state, an error is displayed when you try to publish the template.

Configure dynamic clauses for contract templates

Enable dynamic customized content in contract templates through clauses that contain clause variations for preset conditions.

A clause is a collection of clause variations, which contain a block of content. For example, say only one section in a Non-disclosure Agreement contract document needs to be changed based on the geographic region of the signing legal entity. You would create multiple document templates with the identical content with the only difference being location-related content. You could then use the condition-based clause variations to create only one contract template that can generate documents for different locations.

Clauses are stored in a clause library, from which you can insert them in contract templates. You can create and add clause variations while creating a contract template or add them later.

Benefits of clause variations

The benefits of using clause variations in document templates are:

- Efficient use of a single contract template to produce contracts with different customized details.
- Inclusion of a single clause variation in multiple contract templates.
- Ability to define conditions and set the priority of execution so an appropriate content variation is picked up dynamically in the generated document.

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Related information

- Create or edit a contract clause
- Create a clause variation
- Add metadata to a clause using add-in

Create or edit a contract clause

As a contract configurator, create or modify clauses that manage clause variations that are mapped to contract templates.

Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Clause Management**.
2. Choose whether you are creating a new clause or modifying an existing clause.
   - To create a clause, select **New**.
   - To modify an existing clause, open a clause from the list.
3. On the form, fill in the fields.

Clause New Record form

Field	Description
Number	This field is automatically populated with a unique number.
Name	Unique name for the clause.
Contract Type	Type of contract for which you want to associate the clause. **Note:** Only active contract types are displayed in the list.
Table	Table to which you want to associate the clause. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure the clause library on a different table. Example: If you select Legal Contract Request table, the clause will appear only for the templates associated to that table.
Description	Information about the clause.
Application	Application to which the clause belongs. This field is automatically set to the application scope in which you're creating the clause.
Active	Option to make the clause active and available for use. **Note:** While editing an existing clause, you can't set the clause as inactive if an active clause variation is present.

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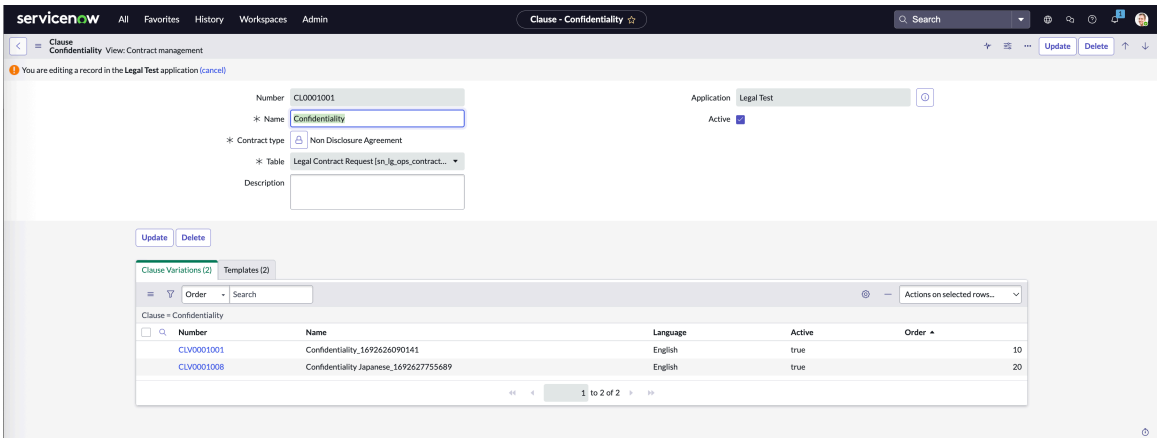
4. Right-click in the form header and select **Save**.
   The clause is saved and the related lists for Clause variations and Templates appear.
5. Save the clause.
   - To save a new clause, select **Submit**.
   - To save the changes to an existing clause, select **Update**.

Clause form



What to do next

Create clause variations to use them in the document template for a predefined condition. For more information, see Create a clause variation.

Create a clause variation

As a contract configurator, create a clause variation to use in a contract template for predefined condition.

Before you begin

Role required: sn_cm_core.contract_config

About this task

If you want the variables related to contract request to be available in condition builder, add the contract request reference to your application table. For more information, see Enable contract request fields in condition builders

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Clause Management**.
2. Select a clause.
3. In the **Clause Variations** related list, select **New**.

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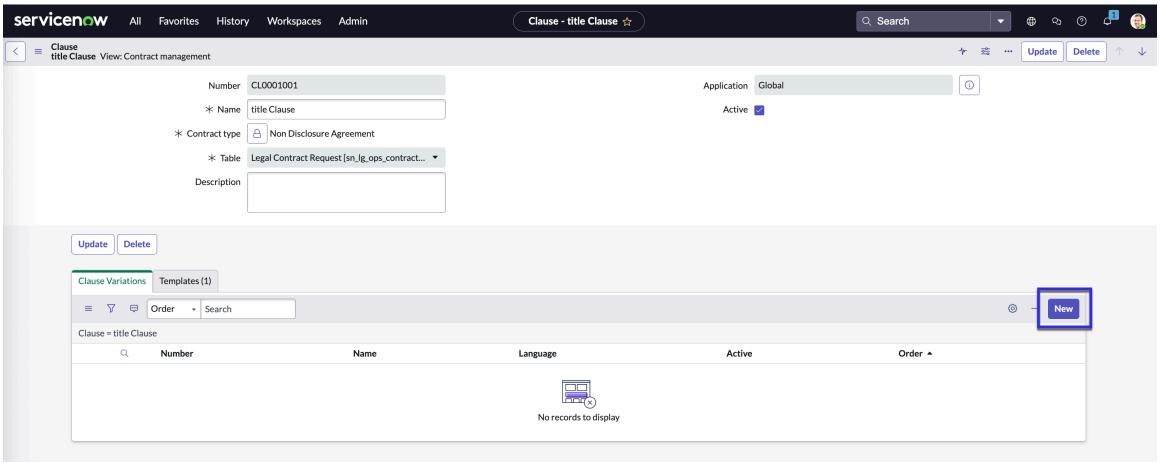
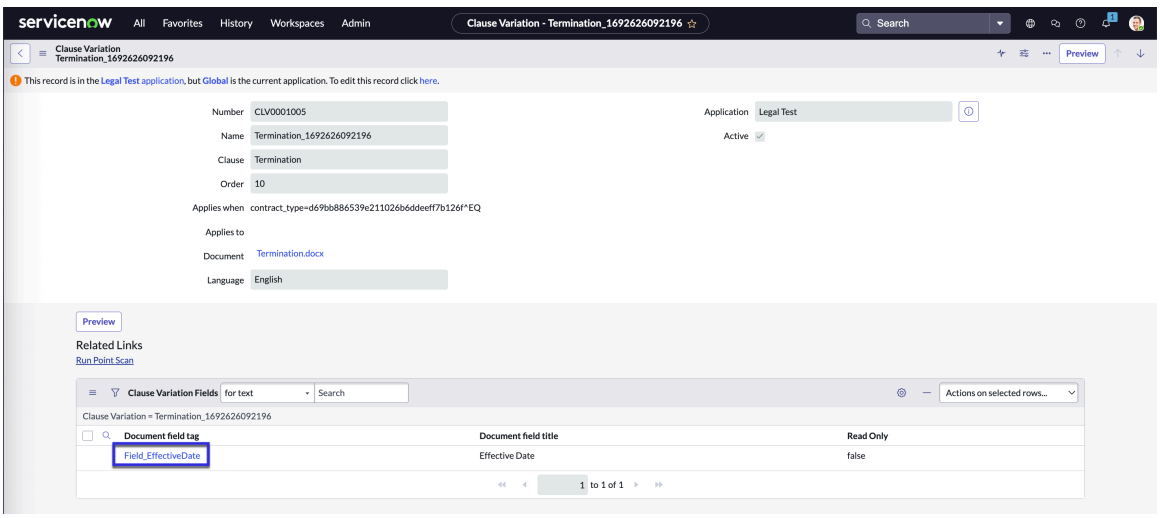
Add new clause variation



4. On the form, fill in the fields.
   For more information on fields, see Clause Variation form.
5. Right-click in the form header and select **Save**.
   - The Clause Variation Fields related list appears.
   - The imported document is parsed, and the content controls of type Field are extracted and displayed in the Clause Variation Fields related list.
   - If you are editing a clause variation that is associated with a published contract template and have imported a document that has additional content controls, the unmapped content controls will be listed under the Unmapped metadata related list
6. In the Clause Variation Fields related list, select a clause variation field.

Add new clause variation



7. On the form, view the following details.

Clause Variation Field form

Field	Description
Clause Variation	This field is automatically set to the clause variation name.
Document field title	Title of the content control.

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Field	Description
Document field tag	Tag of the content control.
Read Only	Option to prevent this field from being edited.

8. In the Clause Variation Field form, save the meta data by selecting **Update**.
9. In the Clause Variation form, save the clause variation by selecting **Update**.

Add metadata to a clause using add-in

As a contract configurator, add metadata to pre-fill information that will be placed in the contract document.

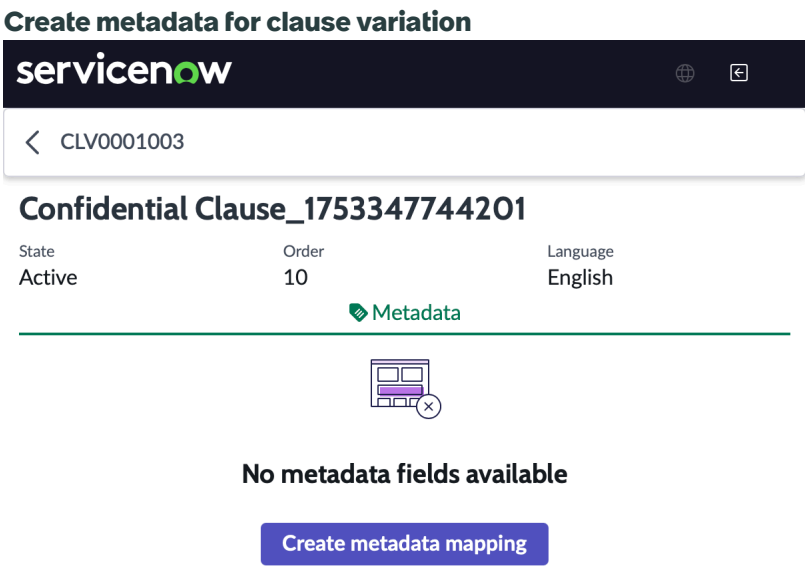
Before you begin

Ensure you have configured the Word add-in. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open a document where you want to mark the content controls in Microsoft Word.
2. From the Microsoft Word ribbon, select ServiceNow Contracts add-in.
   The add-in login screen is displayed.
3. Enter the credentials of the ServiceNow instance from where you downloaded the manifest file.
   The add-in screen is displayed with Templates and Clauses tabs.
4. In the Clauses tab, select a clause.
   The clause variation details are displayed.
5. Select the clause variation for which you want to add metadata.
6. In the Microsoft Word, place the cursor at the location where you want to add the metadata.
7. Select **Create metadata mapping**.



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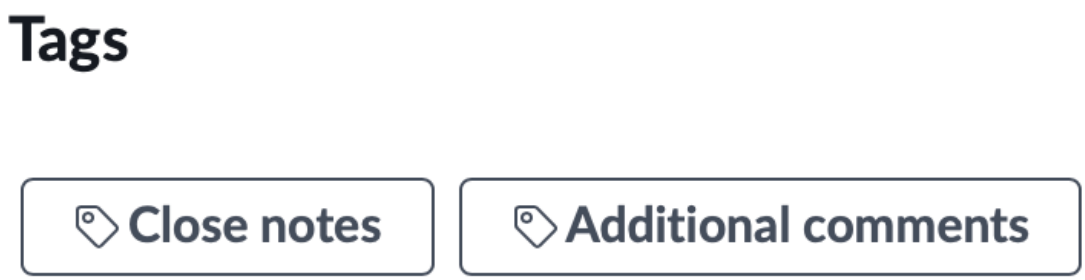
8. In the **Field name** field, enter unique name for the metadata.
9. Select **Create**.
   - The metadata is added and displayed as a tile with field name as the title.



   - The metadata is synced to the ServiceNow instance. You can view the meta data by logging to the ServiceNow instance and navigating to the **Field mapping** related list of a clause variation.
10. **Optional:** Add the created metadata to other locations in the document by clicking on the tag.
11. Select **Complete mapping and upload**.
    The file will be uploaded. If the clause variation is mapped to multiple templates and the variation has metadata, the unmapped metadata is displayed and you must map them for each of the templates.

Define an internal signatory rule

Define an internal signatory rule to map signatories to a template using signatory mappings.

Before you begin

Role required: sn_cm_core.contract_admin and sn_cm_core.contract_config

About this task

If you want the variables related to a contract request to be available in the condition builder, add the contract request reference to your application table. For more information, see Enable contract request fields in condition builders

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Internal Signatory Rules**.
2. Select **New**.
3. On the form, fill in the fields.

Internal Signatory Rules form

Field	Description
Name	Display name of the internal signatory rule.
Template	Template selected from the active and published templates list.
Table	Table that is associated with the selected template. The field is auto-populated when the template is selected.
Description	Description of the internal signatory rule.

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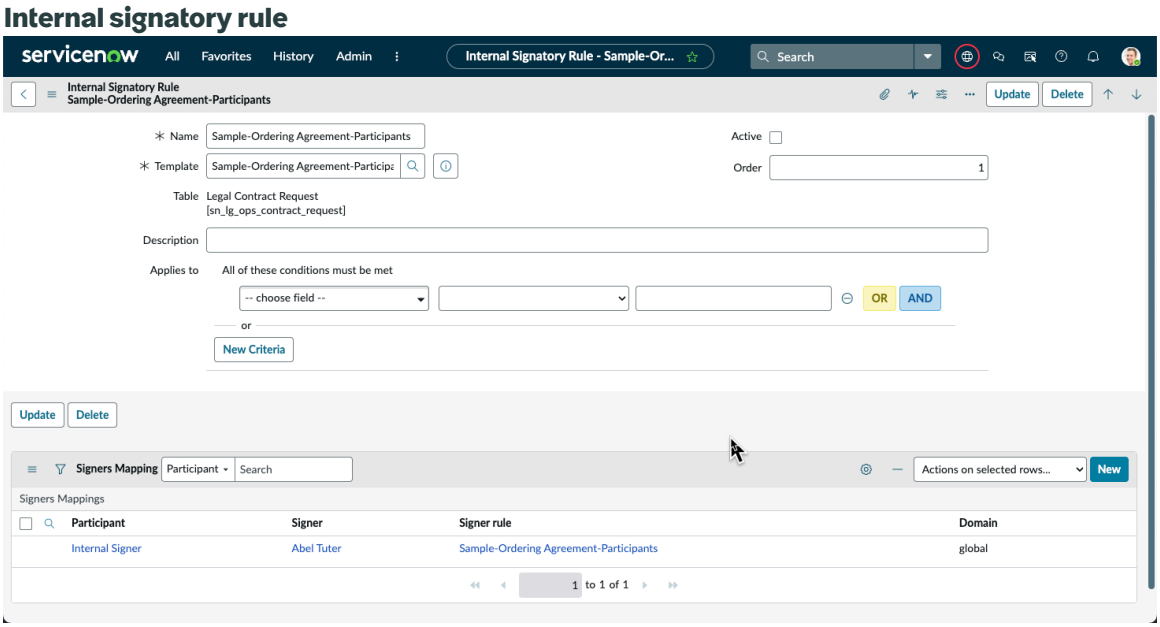
Field	Description
Active	Option to indicate that the signatory rule is active and available for use.
Order	Order in which the signatory rule is used.
Applies to	Conditions under which the internal signatory rule is selected. For example, if you select an assignment group and configure a user as signatory, that user will be the internal signatory for contract requests that include the selected assignment group.

4. Right-click the form header and select **Save**.



5. In the **Signers Mappings** section, select **New**.

   a. In the **Participant** field, select a participant.

      Note: If signature blocks are configured for the contract template, this field isn't available.

   b. In the **Signer** field, select a user from the list.

   c. Select **Submit**.

6. Select **Update**.

   Note: When more than one internal signatory rule is applicable, the signatory rule with the lowest order is considered.

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Result
An internal signatory rule is created to map a user as an internal signatory for the corresponding contract template.

Note: During signatory assignment for contract based on own paper, the *Internal Signatory* rule takes precedence.

- A user from **Signers mappings** is picked as a signatory.
- For contract templates configured with participants, when a participant does not meet the *Internal Signatory* rule criteria, a signatory is picked from the user field mapping of the participant list in the template.
- While creating the signer task for an internal user, check whether the user's legal name is available in the user's employee profile. If no value is provided in the **Legal Name** field, use the user name from the Users [sys_user] table. For more information, see Employee Profile form.
- When no data is found, an empty signatory record is created that can update with the correct signatory details.

Configure contract template rules

Configure a rule to identify the contract document template used for generating the contract document for a request.

Before you begin
Role required: sn_cm_core.contract_config

About this task
If you want the variables related to contract request to be available in condition builder, add the contract request reference to your application table. For more information, see Enable contract request fields in condition builders

Procedure
1. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Contract Template Rules**.
2. Select **New**.
3. On the form, fill in the fields.

Contract Template Rule form

Field	Description
Name	Unique name of the contract template rule.
Description	Description of the contract template rule.
Requested table	Table in which the contract requests are saved. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve and reusability across product lines. You can choose to configure the template rules on a different table.
Category	Category of the document template.
Template	The published and active contract template that will be used to generate the contract document.

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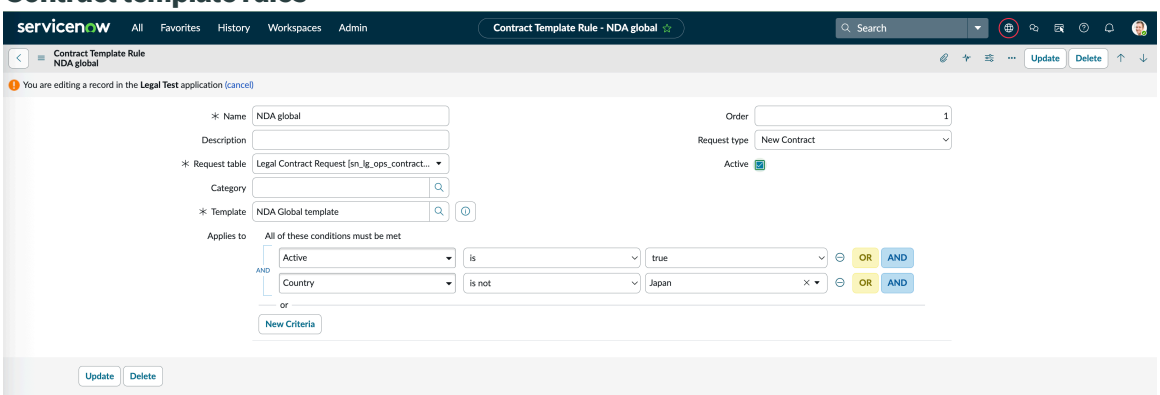
Field	Description
Order	Order in which the selection rule is run. If multiple rules meet the conditions from a contract request, the template rule with the lowest- order number is run for selecting the template.
Request type	Type of request the template rule is applicable to. For contract requests, select **New Contract**; for amendment requests, select **Amendment**.
Active	Option for marking the rule active. Only active rules are considered while submitting a request and identifying the appropriate template
Applies to	Conditions under which the contract template is selected. For example, to apply a rule when a contract request is submitted in an NDA category, you would enter the condition **[Category][is][NDA]**.

4. Select **Submit**.

Contract template rules



What to do next

Create a contract configuration

Create a contract configuration

Define the contract repository where the contracts will be stored and map the data to be added to the contract or amendment document.

Before you begin

A contract template and a template rule that will pick the template when the user submits a contract or amendment request must exist. For more information, see Configure templates for a contract and amendment request in Contract Management Pro and Configure contract template rules.

You can distinguish configurations for an amendment request from those for a new contract by using the **Request type** selection.

If you want the variables related to the contract request to be available in condition builder, add the contract request reference to your application table. For more information, see Enable contract request fields in condition builders

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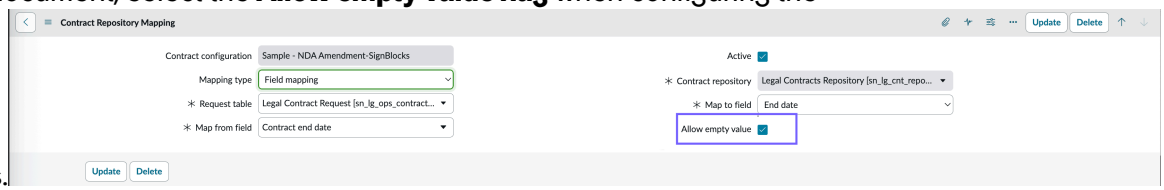
For a request:

- The fields mapped in the contract configuration determine which values will be updated in the contract document.
- For a contract request, a new contract repository record is created. According to field and variables mapping, the values are populated into the contract document.
- For an amendment request, a new contract repository record isn't created. Instead, the existing record is updated by overriding values for fields and variables that have a defined mapping. If a mapping doesn't exist for a specific field, its value remains unchanged. For example, to update the contract end date through an amendment, the mapping for the end date field must exist.

  If you want to copy fields with empty values and override existing values in the contract document, select the **Allow empty value flag** when configuring the mappings.



Role required: sn_cm_core.contract_config

About this task

To add data to the contract documents, you have to map request table fields to repository fields.

Note:

Third party contracts already have a default contract configuration in the base system.

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Configuration**.
2. Select **New**.
3. On the Contract Configuration form, fill in the fields.
   For more information, see Contract Configuration form.
4. Select **Save**.
5. In the Contract Repository Mappings related list, select **New**.

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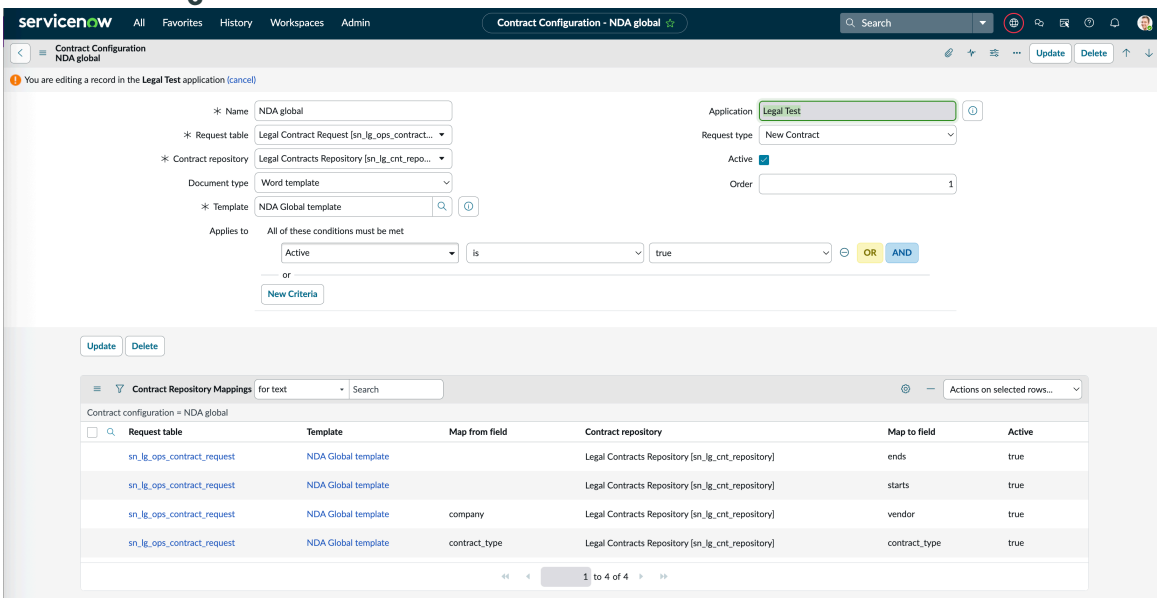
Contract configuration



6. In the **Mapping type**, select the type of mapping you want to do.
   The fields on the form change depending on the selection.

Mapping type	Fields available
Field mapping - Map fields from the request table to the fields in the contract repository table.	○ **Request table**- Table to which you want to associate the contract configuration. ○ **Map from field**- Field of the request table that you want to map to the **Map to field**, a field in the contract repository. ○ **Active** - Option to indicate that contract repository mapping is active. ○ **Contract repository** - This field is automati cally set to the configuration repository set in the **Contract repository** field. ○ **Allow empty value** - Option to enable copy ing of empty values to contract repository and override the existing value. **Note:** This option is available on ly when the **Request type** is set to Amendment in the contract configura tion and it isn't selected by default.
Template mapping- Map the template map pings of a contract template to the fields in the contract repository.	○ **Template** - This field is automatically set to the template for which you're creating the repository mapping. ○ **Template mapping** - The field from the tem plate that you want to map to the **Map to field** value, a field in the contract reposito ry. ○ **Active** - Option to indicate that the contract repository mapping is active.

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Mapping type	Fields available
	○ **Allow empty value** - Option to enable copy ing of empty values to contract repository and override the existing value. **Note:** This option is available on ly when the **Request type** is set to Amendment in the contract configura tion and it isn't selected by default.
Template mapping- Map variables of record producer to the fields in the contract reposi tory table.	○ **Record producer**- The record producer from which you want to copy the variable. For example, If you want to copy a variable from a contract request for Non-disclosure Agreement, select record producer for a Non-disclosure Agreement. ○ **Variable**- The variable of the record produc er that you want to map to a field in the con tract repository. ○ **Active**- Option to indicate that the contract repository mapping is active. ○ **Map to field**- The field to which you want to map the variable from the record producer. ○ **Allow empty value** - Option to enable copy ing of empty values to contract repository and override the existing value. **Note:** This option is available on ly when the **Request type** is set to Amendment in the contract configura tion and it isn't selected by default.

7. Select **Submit** to save the repository mapping.
8. Select **Update** to save the contract configuration.

Configure additional features in Contract Management Pro

Set up these configurations to unlock additional capabilities in Contract Management Pro, such as enabling email notifications, displaying related lists in contract requests, generating audit certificates, activating contract workspace, and more.

Configuring Contract Workspace

Configure and customize Contract Workspace by using the UI Builder web user interface builder.

Configuration overview

For more information about this application, see UI Builder.

Access UI Builder to customize the Contract Workspace by navigating to **All** > **UI Builder**, and then selecting **Contract Workspace**.

For more information, see Working in UI Builder and Configuring Configurable Workspace.

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Activate Contract Workspace

You can activate the Contract Workspace plugin (sn_cm_workspace) for Contract Management Pro if you have the admin role.

Before you begin

Review the Contract Workspace application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Two roles are installed with the Contract Workspace plugin.

For more information, see Components installed with Contract Workspace.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Contract Workspace plugin (sn_cm_workspace) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Configure AI search for Contract Workspace

Get improved search results in Contract Workspace by configuring the ServiceNow® AI Search application to work with it.

Before you begin

Role required: admin

About this task

With the AI Search engine in Contract Workspace, you can search with keywords related to contract requests and find the most relevant search results.

If you are a new customer, the AI Search application is configured with your base system.

If you are an existing customer, you have to configure Contract Workspace to use the AI Search application.

For more information on the AI Search application, and how to use most effectively use it, see AI Search. For information about how to associate the AI Search application with Contract Workspace, see Create a search application configuration for AI Search.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the Experiences section, select **Contract Workspace**.

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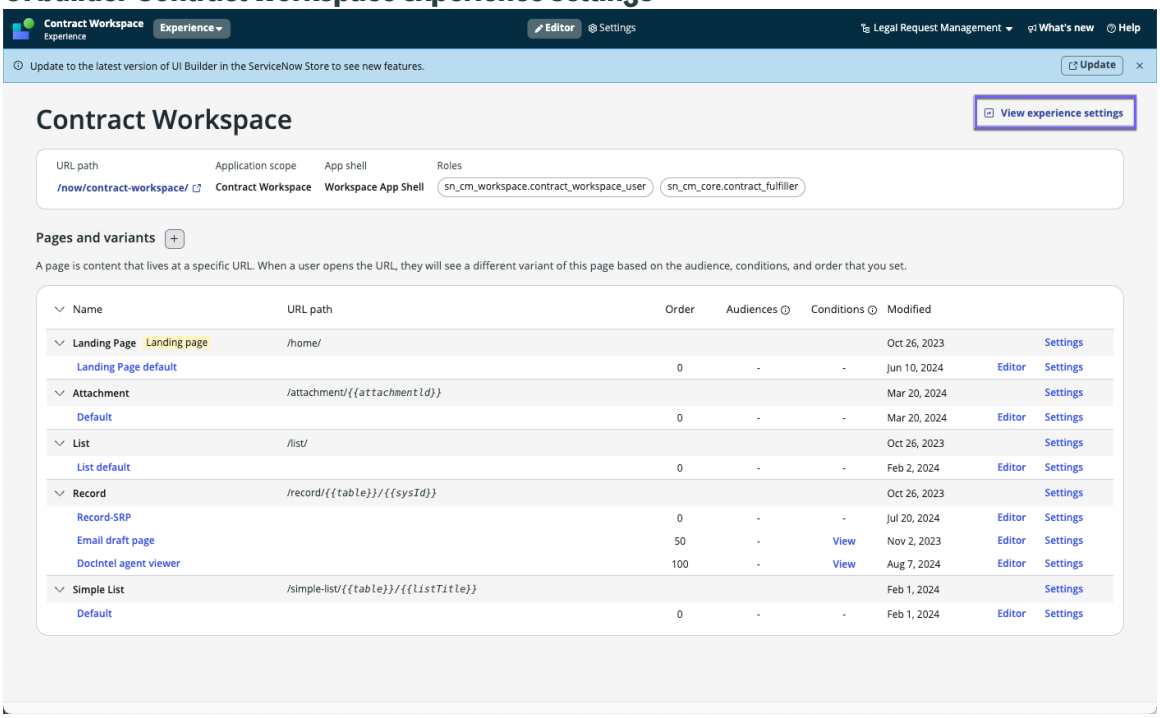
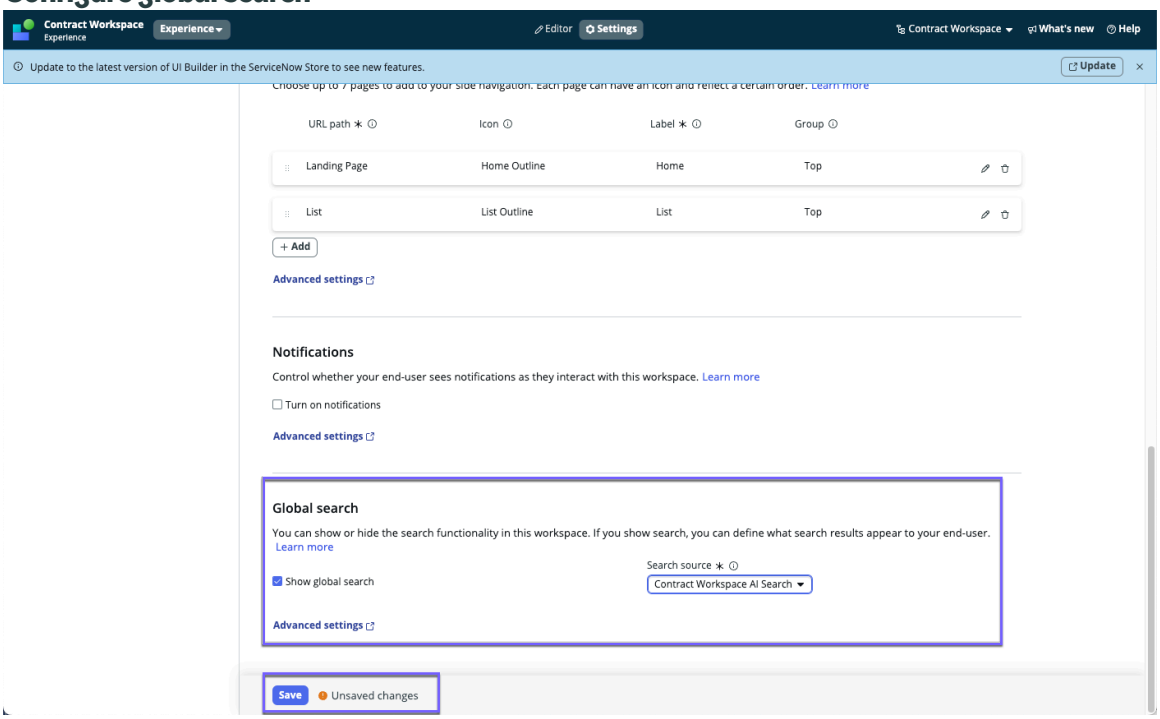
3. Select **View experience settings**.

UI builder Contract workspace experience settings



4. In the Global search section, in the **Search source** drop-down list, select **Contract Workspace AI Search**.
5. Select **Save**.

Configure global search



6. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.

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7. In the AI Search Index Sources page, select **Contract Request** and **Contract Repository**.
8. Index tables to improve the performance and accuracy of search results by selecting **Index All Tables** from the Actions for selected rows drop-down list.

Result
AI Search is configured for Contract Workspace.

Configure signature pause duration when modifying signatories

Configure the duration for which a signature workflow is paused when signatories are modified for an ongoing signature workflow.

Before you begin
The Modify Signatories and Resume Signature options enables a contract fulfiller to pause an ongoing signature process to add, remove, modify, or reorder pending signatories.

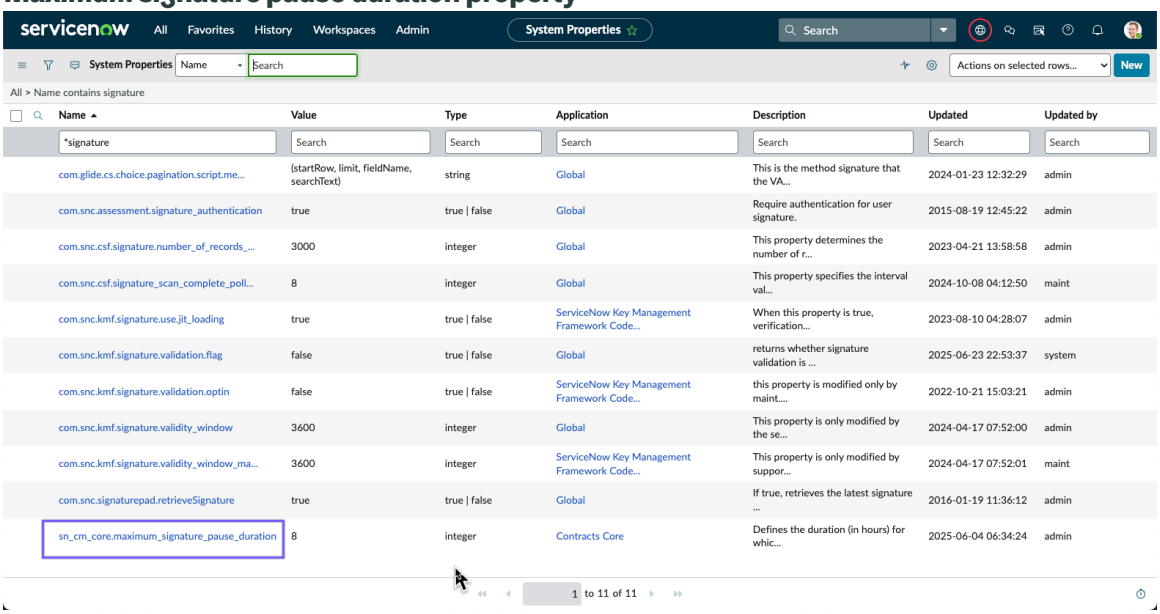
If the signature process is not resumed within the configured time limit set by the system property, changes made to the signatories are automatically reverted, and the signature process resumes from its previous state.

Role required: sn_cm_core.contract_admin

About this task
Note: This property is applicable only for wet signature workflow and electronic signature workflow with Docusign integration.

Procedure
1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `maximum_signature_pause_duration` property.

Maximum signature pause duration property



3. Select the property.
4. If you aren't able to edit the property in the current application scope, select the word **here** in the message at the top of the page.
5. Update the **Value** field with the time duration for which the signature process is paused.

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- The minimum value that can be set is 8 hours and the maximum is 24 hours. The default duration is set to 8 hours.
- The value of 8 hours is considered, if the value configured is outside the allowed range.

6. Select **Update**.

Result

The signature pause time duration is set. For more information on the signature workflow, see Signature workflow for a contract request and Modify signatories.

Auto-populate the start date and end date for contract requests

Configure an extension point implementation to automatically add the start date and end date while creating a contract request.

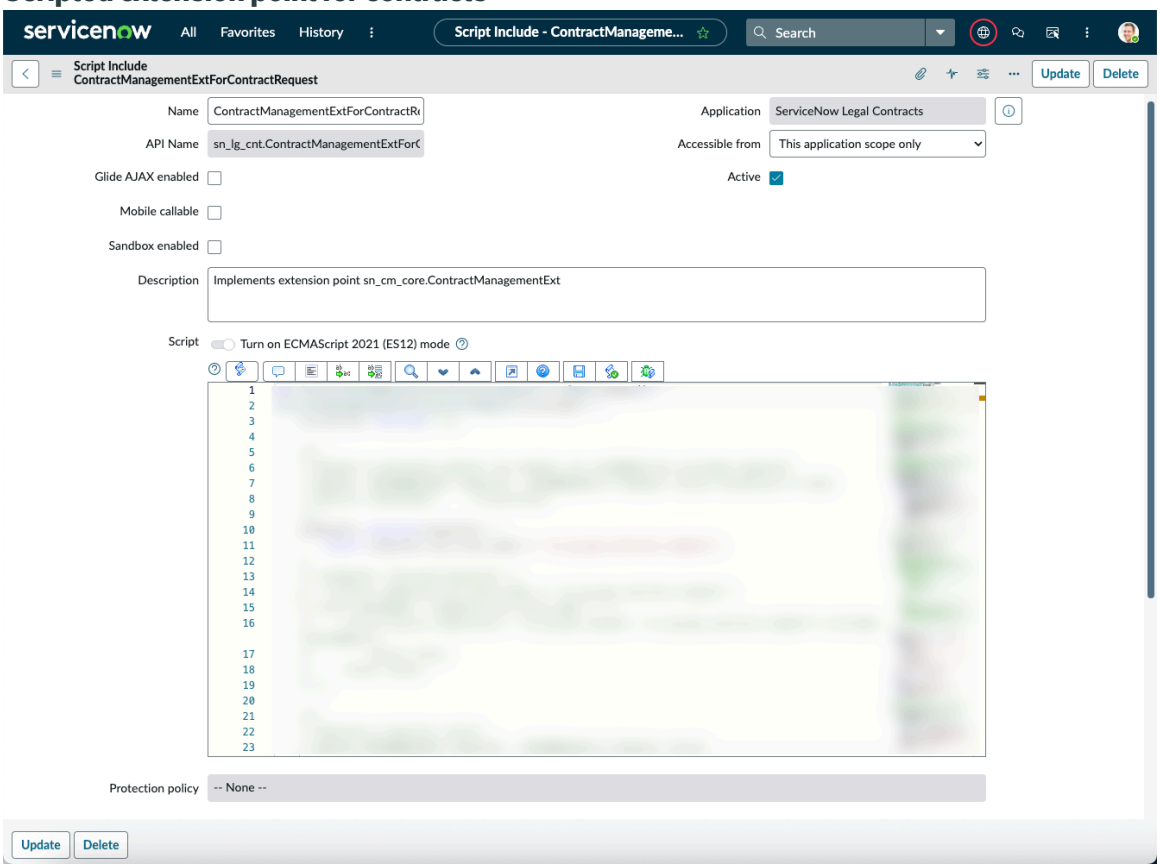
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, enter `sn_cm_core.ContractManagementExt`.
3. Select the record.
4. In the Related Links section, select **Create implementation**.
5. On the Script Include form, fill in the fields.

Scripted extension point for contracts



For a description of the field values, see Scripted Extension Point form fields.

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6. In the **Script** field, add a method `populateDataForInitiateContractModal` to define the fields from which the values will be automatically added in the **Start date** and **End date** fields of a contract request.
   You can also define the exact dates for the **Start date** and **End date**.
7. Select **Update**.

Result

The **Start date** and **End date** fields in the Initial contract window are automatically updated from the parent record while creating a contract request.

For more information on initiating a contract request, see Initiating a contract or amendment request.

Activate a system property to generate a certificate of completion

As a contract configurator, activate a system property to generate a certificate of completion for electronically signed contracts.

Before you begin

You must have configured an electronic signature provider. For more information, see Configure an e-signature provider.

Role required: admin

About this task

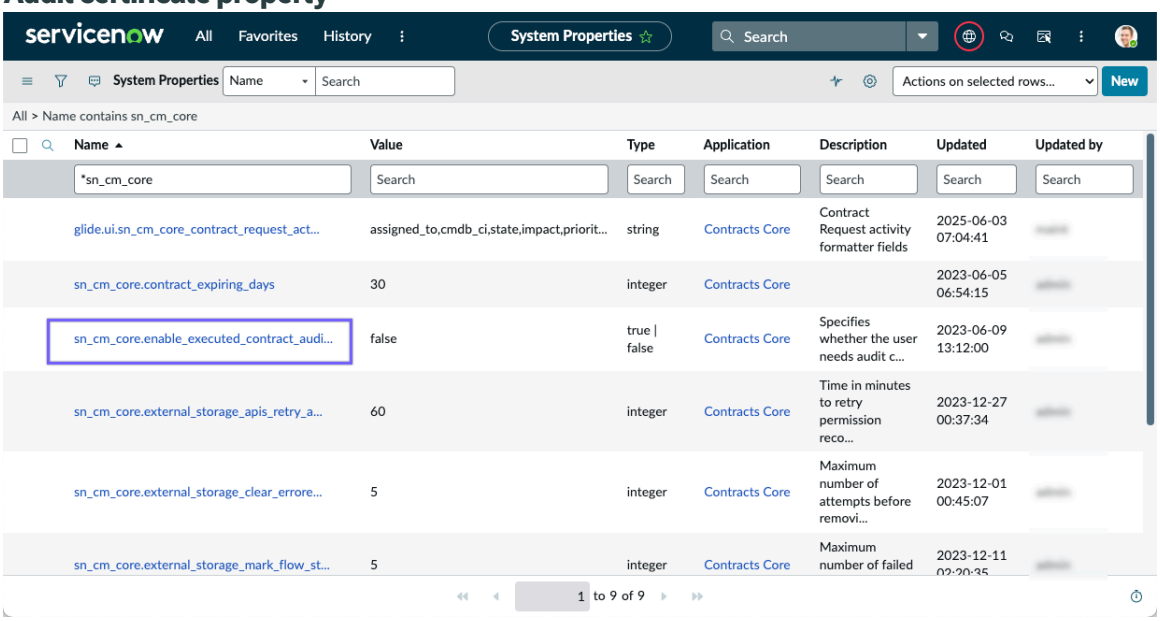
Note: This feature is applicable only for electronically signed contracts.

The certificate of completion provided by Docusign or Adobe Acrobat Sign includes the audit trail with the time stamp details about each signatory action during an electronic signature. The audit trail ensures non-repudiation and resolves any objections.

Procedure

1. In the filter navigator, enter `sys_properties.list`.
2. In the **Name** column, search for the `sn_cm_core.enable_executed_contract_audit_certificate` property.

Audit certificate property



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3. Select the property.
4. If you aren't able to edit the property in the current application scope, select the word **here** in the message at the top of the page.
5. Update the **Value** field to `true`.
6. Select **Update**.

Result
A certificate of completion will be generated for all electronically signed contracts.

Enable users to view email details in activity stream

As a contract configurator, specify the user roles to enable users to view email details in the activity stream of contract requests.

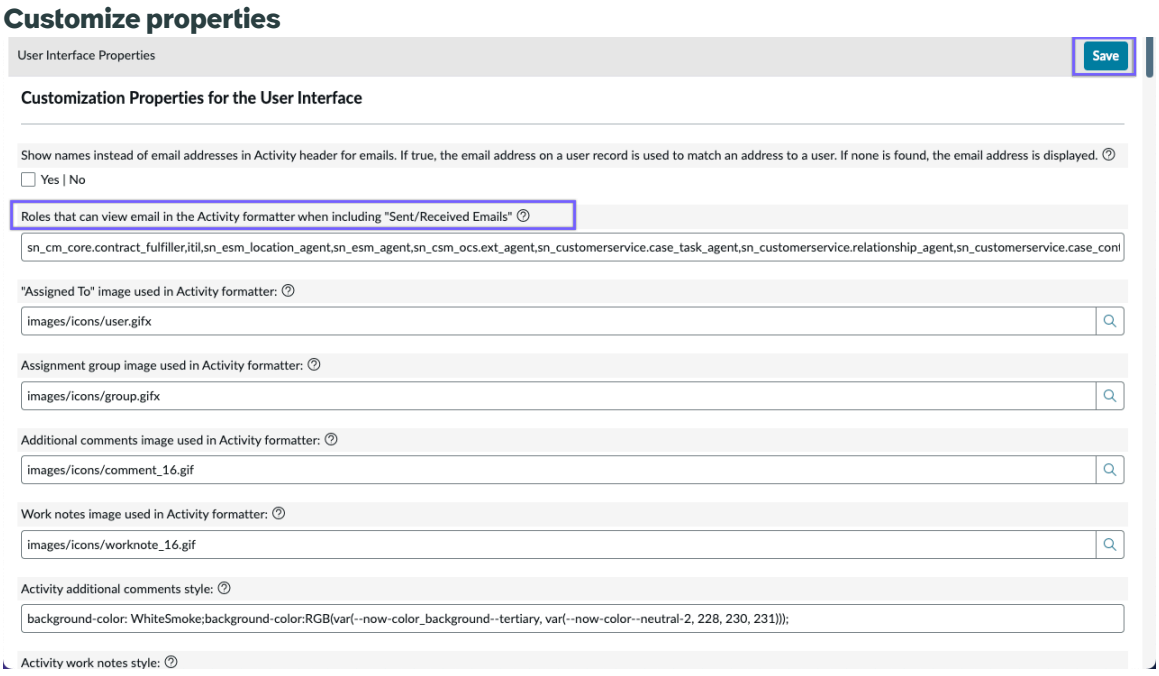
Before you begin
Role required: admin

Procedure

Specify the user roles for a user.

- Add role using user interface (UI).
  a. Navigate to **All** > **System Properties** > **UI Properties**.
  b. In the **Roles that can view email in the Activity formatter when including "Sent/Received Emails"** property field, add roles for which you want to enable viewing of sent email details in the activity stream. Use comma separator while adding additional roles.

     For example, to enable contract fulfillers to view email details in the activity stream, add `sn_cm_core.contract_fulfiller`.



  c. Select **Save**.
- Add role to the system property.

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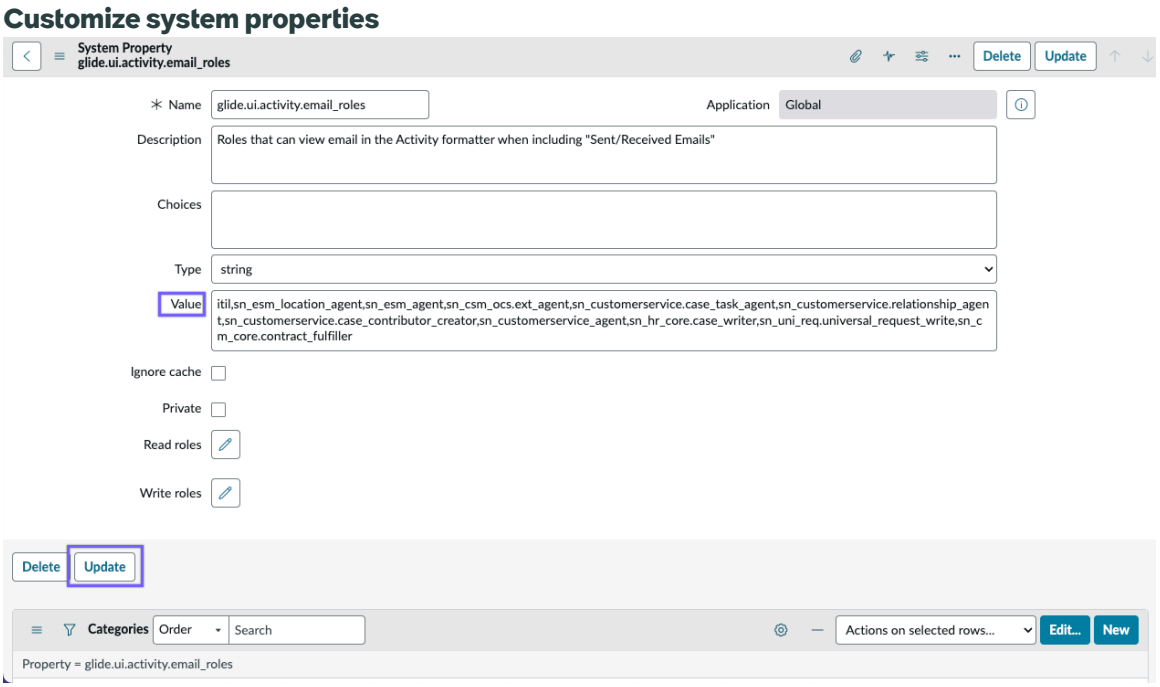
a. Select the **All** menu.

b. In the search bar, enter `sys_properties.list`.

c. In the **Name** column, search for the `glide.ui.activity.email_roles` property.

d. In the **Value** field, add roles for which you want to enable viewing of email details in the activity stream. Use comma separator while adding additional roles.

   For example, to enable contract fulfillers to view email details in the activity stream, add `sn_cm_core.contract_fulfiller`.



e. Select **Update**.

Result

The users with the assigned role that has been added to the system property can view email details in the activity stream of a contract request.

Enable keyword search for contract templates

Enable keyword search in contract templates.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Text Index Configurations**.
2. From the list, select the record with the table value **Word Template [sn_doc_word_template]**.
3. Select **Generate Text Index** from the Related Links

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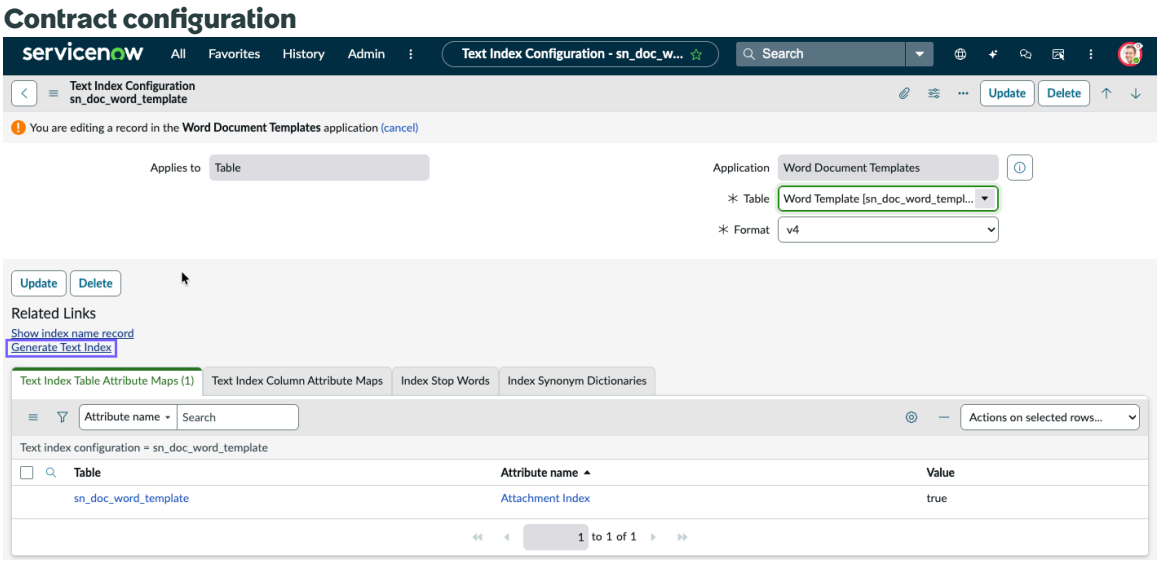
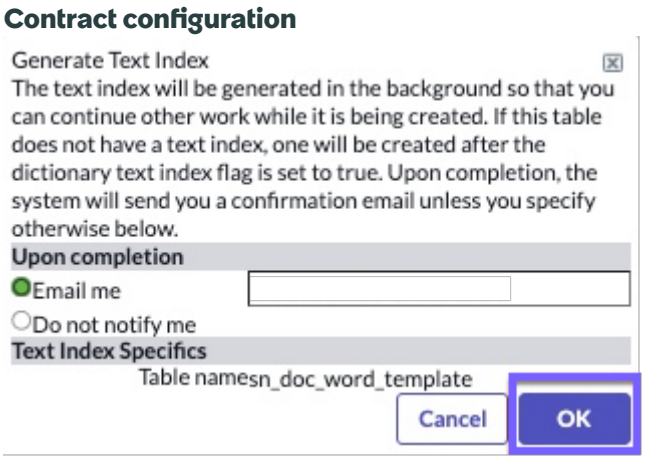


4. Select **Ok** in the Generate Text Index dialog box.



Result

The table will be indexed. For more information on how to search for a keyword in a contract template, see Search for keywords in contract templates

Configuring contract summarization for Contract Management Pro

Configure the smart documents skill in Now Assist in Document Management to generate a contract summary in Contract Management Pro.

You can summarize contracts, generate frequently asked questions (FAQs), and retrieve specific information from contracts in Contract Management Pro by using the Smart Documents feature.

To enable this feature in Contract Management Pro, do the following:

1. Activate the smart documents skill in Now Assist in Document Management. For more information, see .
2. To enable contract summarization for contract documents, supporting documents, and signed contracts, add the following tables in the **Define availability** tab of smart documents skill.
   - Contract [ast_contract]
   - Contract Document Revision [sn_cm_core_document_revision]

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- Legal Contracts Repository [sn_lg_cnt_repository]
- Supporting File [sn_cm_core_supporting_file]

3. To enable users to access the contract summarization feature, add the following roles in the **Define access** tab of the smart documents skill.
   - Contracts Core administrator [sn_cm_core.contract_admin]
   - Contracts Core user [sn_cm_core.contract_user]
   - Contracts Core fulfiller [sn_cm_core.contract_fulfiller]
   - Contract reviewer [sn_cm_core.contract_reviewer]
   - Contract manager [contract_manager]
   - Legal contract fulfiller [sn_lg_cnt.contract_fulfiller]
   - Legal contract administrator [sn_lg_cnt.contract_admin]
   - Legal contract owner [sn_lg_cnt.contract_owner]
4. Enable the Now Assist panel for your instance. For more information, see Turn on the Now Assist panel.

Configure conditions to send reminder notifications for expiring contracts

Configure contract repository rules to determine the expiration conditions under which reminder notifications for expiring contracts are sent.

About this task

Email notifications are available for the following contract expiration conditions in the base system:

- Expired – The email notification reminder is not sent and the expiration level in the contract is set as Expired.
- within 7 days – The email notification reminder is sent seven days before the expiration of the contract.
- within 15 days – The email notification reminder is sent 15 days before the expiration of the contract.
- within 30 days – The email notification reminder is sent 30 days before the expiration of the contract.

You can update the contract repository rule to modify or add expiration conditions that determine when the notification email is sent.

Before you begin

Role required: sn_cm_core.contract_admin

Procedure

1. Navigate to **All** > **Contracts Core** > **Contracts Administration** > **Contract Repository Rules**.
2. Set the condition for the notification to be sent.
   a. On the Condition Checks page, find the entry whose **Table** field value is Legal Contracts Repository (sn_lg_cnt_repository) and **Condition field** value is expiration_level, and select **Contract** in the **Category** field.
   b. In the Conditions section, select **New** to create a condition.

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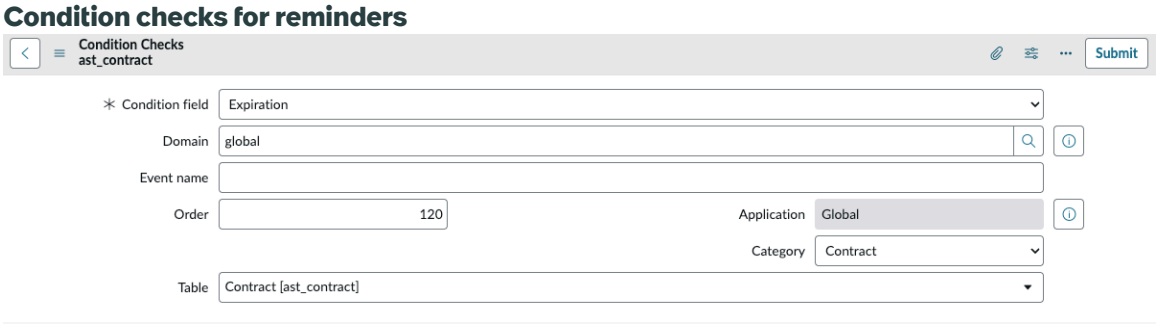
c. On the form, fill in the fields.



For more information on these fields, see Expiring Contracts Condition form fields.

d. Select **Submit**.

3. **Optional:** Customize the message content in the default email notification template.

a. Select **All** > **System Notification** > **Email** > **Notifications**.

b. Search for and select **Legal Contract Expiry Reminder**.

(Optional) If a message regarding the current application scope is displayed, select **here**.

c. In the Legal Contract Expiry Reminder window, select the **What it will contain** tab.

d. Enter the content for the email notification message in the **Message HTML** field.

e. Select **Update**.

Result

The contract expiration reminders will trigger based on the defined conditions for contract repository. For more information on configuring contract repository, see Create a contract configuration.

Copy fields from parent request to amendment request

Configure the *ContractManagementExt* extension point to automatically copy fields to contract request from the linked parent request and parent contract.

About this task

As an admin, you can configure fields for which the values from the contract repository record will be automatically copied to the amendment request. Configure common fields between the contract repository record and the amendment request so that the contract fulfiller can update them as per the requested amendments. Example: If you configure end date and payment terms to be available and automatically copied from the contract repository, the fulfiller can modify value for these fields as part of the amendment request.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, enter *sn_cm_core.ContractManagementExt*.
3. Select the record.
4. In the Related Links section, select **Create implementation**.
5. On the Script Include form, fill in the fields.

   For a description of the field values, see Scripted Extension Point form fields.

6. In the **Script** field, update the copyDataFromBUToCMR function to configure the fields that you want to copy from the parent record to the contract request.
   For example, if you want to copy the **Account** and **End date** fields from a parent record to contract request, you can use the following:

```
/**
  * @param {GlideRecord} parentRequestGr - GlideRecord of BU
 request record
  * @param {GlideRecord} contractGr - GlideRecord of signed
 contract record. This will be available only for amendments.
        * For new contract request, this will be null.
   * Make sure to check for null before using contractGr
  * @param {String} requestType - Helps to identify if the
 request is `amendment` or `cmr`
  * @param {String} application - Id of application. Helps to
 identify to which Business unit or appplication the contract
 request belongs to
  * @returns {Object} - Key value pairs of fieldName and its
 value in data sub-object
   * contractGr will be provided only in case of amendment
 request type.
   * Based on the request type, can add required mapppings for
 CMR record.
   * For New contract request, mapping can be done from
 parentRequestGr to ContractRequest record
   * For Amendment, mapping can be done from parentRequestGr
 and contractGr to ContractRequest record
  * Example- { data: {'account': 'xyz_sys_id', 'end_date':
 '2025-12-07'} }
  */
 copyDataFromBUToCMR: function(parentRequestGr, requestType,
 contractGr,  application) {
           data: {
                     'account':
 parentRequestGr.getValue('account'),
                     'end_date':
 parentRequestGr.getValue('contract_end_date'),
            },

    type: 'ContractManagementExt'
};
```

Note: The data type of the parent contract repository record field and the contract request field must match.

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7. Select **Update**.
8. In the Extension Point form, select **Update**.

Result
When a contract request is initiated, the configured fields are automatically populated with the corresponding values from the associated contract repository record selected while initiating an amendment request.

Manage notifications in Contract Management Pro

Configure the notifications in Contract Management Pro.

Configure Obligation Management notifications

Activate Obligation Management notifications to notify users when an obligation task is created, assigned, submitted, approved, or rejected.

About this task
The Approval Request and Approval Rejected, notifications are triggered when an obligation task is submitted for approval and the obligation task is approved or rejected.

To avoid duplicate notifications for an event, the following notifications are not activated by default:

- Obligation task submitted
- Obligation task approved
- Obligation task rejected

You can activate the notifications specific to obligation tasks and then set up a condition to stop the default system notifications.

For more information about obligation-related notifications, see Obligation Management notifications.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the **Name** column, search for `Obligation`.
3. Select the obligation notification that you want to activate.
4. On the Notification form, select the **Active** check box.
5. Select **Update**.
6. **Optional:** Ensure that default notifications will not be triggered for any events related to obligation tasks.

   a. Navigate to **All** > **System Notification** > **Email** > **Notifications**.

   b. Search for the default notifications that are triggered when an obligation task is submitted for approval and the obligation task is approved or rejected.
   The default notifications are *`Approval Request`* and *`Approval Rejected`*.

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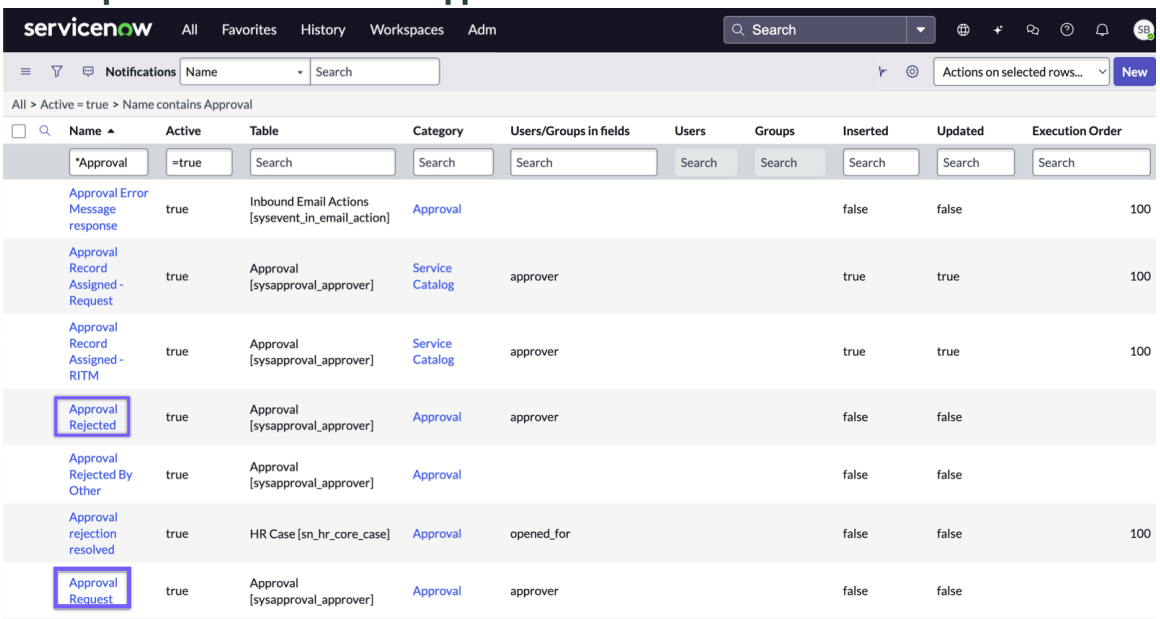
Default platform notifications for approval workflow



Name	Active	Table	Category	Users/Groups in fields	Users	Groups	Inserted	Updated	Execution Order
*Approval	=true	Search	Search	Search	Search	Search	Search	Search	Search
Approval Error Message response	true	Inbound Email Actions [sysevent_in_email_action]	Approval				false	false	100
Approval Record Assigned - Request	true	Approval [sysapproval_approver]	Service Catalog	approver			true	true	100
Approval Record Assigned - RITM	true	Approval [sysapproval_approver]	Service Catalog	approver			true	true	100
Approval Rejected	true	Approval [sysapproval_approver]	Approval	approver			false	false	
Approval Rejected By Other	true	Approval [sysapproval_approver]	Approval				false	false	
Approval rejection resolved	true	HR Case [sn_hr_core_case]	Approval	opened_for			false	false	100
Approval Request	true	Approval [sysapproval_approver]	Approval	approver			false	false	

c. Select the notification.

d. Select the **When to send** tab.

e. In the **Conditions** field, set the following condition to ensure that the selected notification will not be triggered for any events related to obligations tasks: **[Source table] [is not] [sn_cm_obligation_obligation_task]**.

Result

The obligation task-specific notifications are activated and the default system notifications are stopped for obligation events.

Configure email notifications for approval workflow in Contract Management Pro

Activate the notifications for Contract Management Pro to notify users when approval for contract revision is initiated, approved, rejected, or cancelled.

Before you begin

Role required: Admin

About this task

The platform notifications, Approval Request and Approval Rejected, are triggered when approval is initiated for contract revision in a contract request.

To avoid duplicate notifications for an event, the following notifications are not activated by default:

- Contract document - Approval requested
- Contract document - Approved
- Contract document - Approval cancelled

You can activate the notifications specific to Contract Management Pro approval workflow and then set up a condition to stop the default platform notifications.

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Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the **Category** column, search for `contracts support`.
3. Select the contract document approval notification that you want to activate.
   The available notifications are:
   - Contract document - Approval requested
   - Contract document - Approved
   - Contract document - Approval cancelled
4. On the Notification form, select the **Active** check box.
5. Select **Update**.

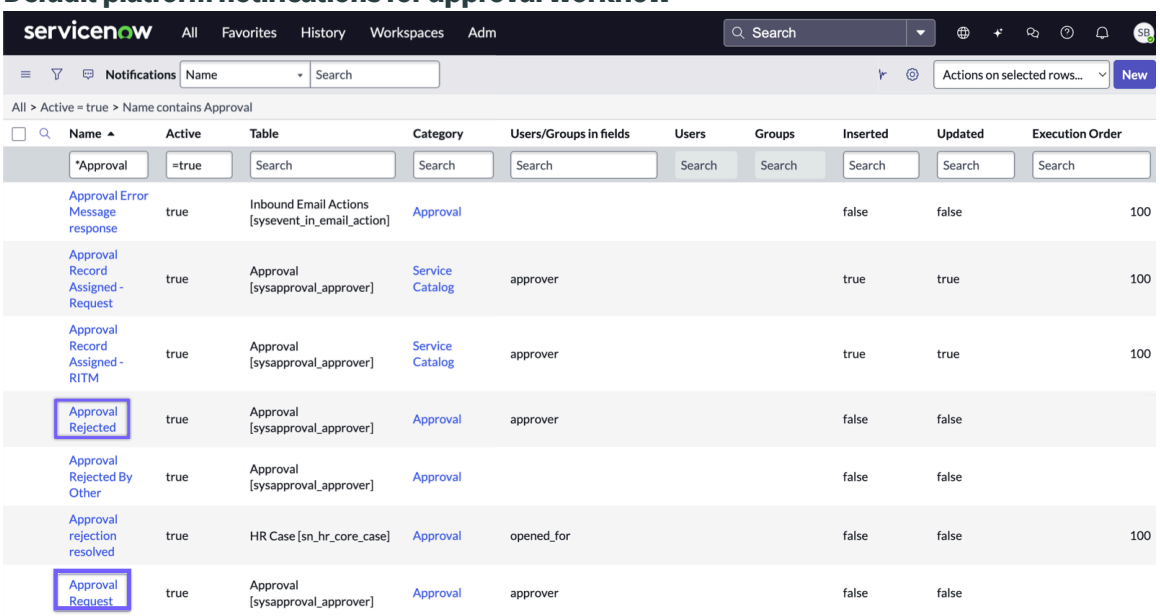
> **Note:** You must configure the **ApprovalNotificationWorkspaceURLExt** extension point to enable the notifications for Legal Counsel Center.
>
> For more information, see Configure extension point for notifications.

6. **Optional:** Ensure that default notifications will not be triggered for approval workflow related to Contract Management Pro.

   a. Navigate to **All** > **System Notification** > **Email** > **Notifications**.

   b. Search for the default notifications that are triggered when approval is initiated for a contract revision.
   The default notifications are *`Approval Request`* and *`Approval Rejected`*.

Default platform notifications for approval workflow



   c. Select the notification.

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d. Select the **When to send** tab.

e. In the **Conditions** field, set the following condition to ensure that the selected notification will not be triggered for contract revision approval workflow: **[Source table] [is not] [sn_cm_core_document_revision]**.

Result
The approval notifications for Contract Management Pro are activated and the default system notifications are stopped for contract revision approval.

Configure extension point for notifications

Add or modify an Action and its functionality on the Standard ticket page for a contract request.

Before you begin
Role required: Admin

- Review the configuration of the script include, scripted extension points, and widgets.
- For more information about using and customizing the script includes, see Script includes.
- Ensure that you've set the application scope to this application.

About this task
The base system `ApprovalNotificationWorkspaceURLExt` script provides the configuration of common actions for all request types. You can override these common actions for a specific request type or add more actions.

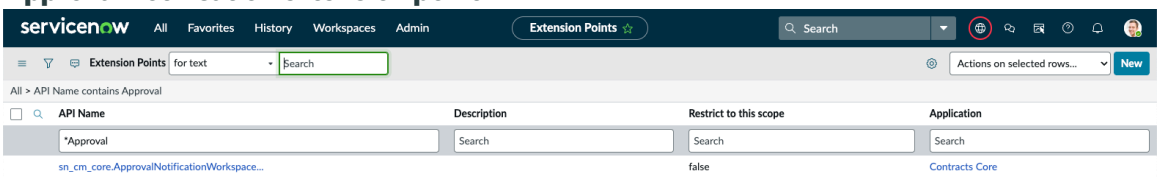
Procedure

Add or modify an action in the scripted extension point.

a. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.

b. Search and select the **ApprovalNotificationWorkspaceURLExt** extension point.

Approval notification extension point



c. Add or modify an implementation for a practice area.
To add a new implementation for a practice area, click the **Create implementation** related link.

On the Script Include form, update the script as required.

i. To restrict this implementation to the practice area, add the following code to the *canHandle* parameter:

```
appliesTo(parentRecord) {
        return <tablename of the parent record>;
    },
    /**
```

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```
   * @return {String} workspace to which the user can be navigated to view the contract
request from notification
   * The navigation URL is formed in runtime as '/now/' + (getWorkspaceURL return
value/output)  + '/record/' + table '/' + sysID.
   *
   * For example:
   * getWorkspaceURL output is  "legal/counsel-center"
   * URL formed in runtime is '/now/legal/counsel-center/record/' + table + '/' + sysId
   */
      getWorkspaceURL: function() {
           return  "legal/counsel-center";

      },
```

ii. To add a new action, update the *process* method.

For reference, see an existing *process* method of the `DefaultLegalTicketActions` script include or the implementation of another practice area.

d. Click **Update**.

Result

To see a list of available default email notifications, go to **All** > **System Notification** > **Notifications** and search for the **Contracts Support** category.

To create new email notifications, see Create an email notification.

Add and configure contract request functionality into your workspace

As contract administrator, configure your workspace to use the Contract Management Pro functionality.

Configure non-task tables for contract templates

Add non-task tables in the script of an extension point implementation so you can select them while creating contract templates. A non-task table does not extend task tables, and stores records, reference data, or configuration information used across the platform.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, enter `sn_cm_core.DocumentTemplateNonTaskTableConfiguration`.
3. Select the record.
4. In the Related Links section, select **Create implementation**.
5. On the Script Include form, fill in the fields.

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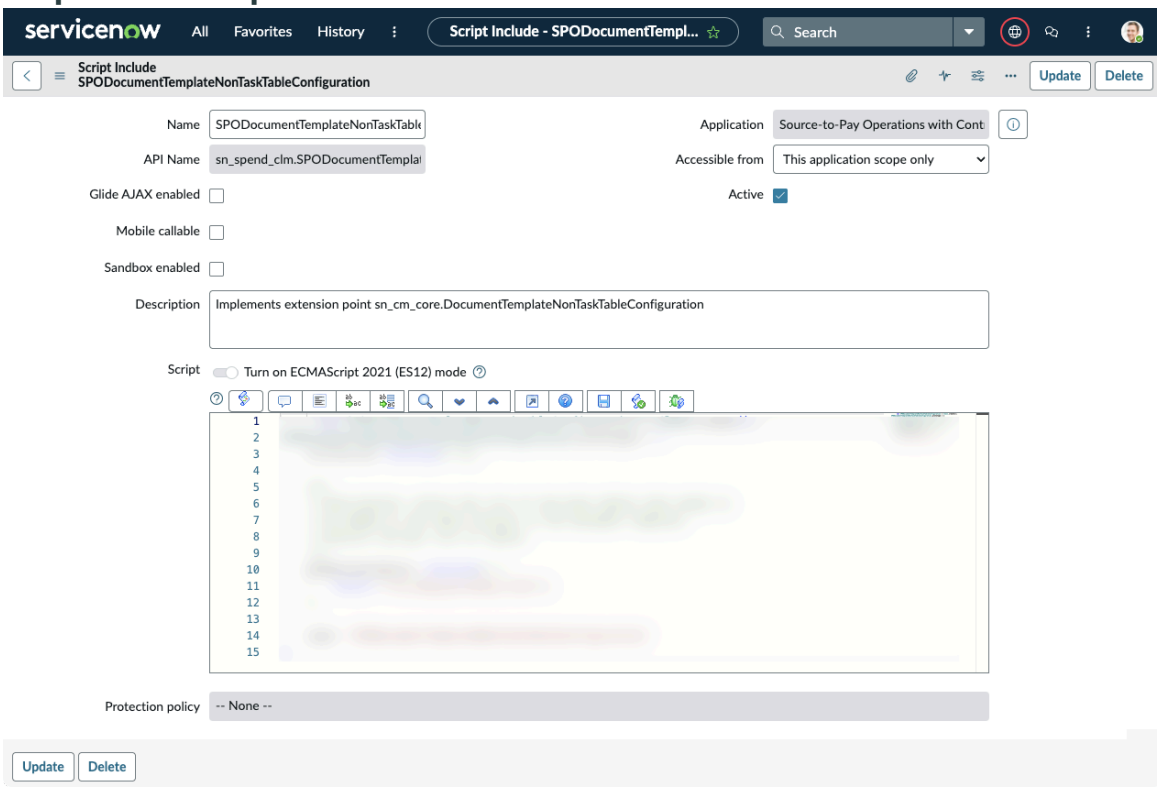
Scripted extension point



For a description of the field values, see Scripted Extension Point form fields.

6. In the **Script** field, enter the name of non-task tables that you want to configure for contract templates.
   Use a comma (,) to separate the non-task table names in the script.

   Example
   The following example shows a script in which two non-task tables are being added.

```
     var DocumentTemplateNonTaskTableConfiguration =
 Class.create();
DocumentTemplateNonTaskTableConfiguration.prototype = {
    initialize: function() {},

    /**
     * Description: return the list of non-task tables that
 needs to
     * be added in the table choices in the document template
     * @return {Array} list of tables
     */
    getNonTaskTables: function() {
  return
 ['sn_spend_psd_procurement_request_line','sn_quote_mgmt_core_q
uote'];
    },

    type: 'DocumentTemplateNonTaskTableConfiguration'
};
```

7. Select **Update**.

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Result

The non-task tables are available for selection in the **table** drop-down list in the Contract templates view of the Word Templates page of the Contract Administration application.

For more information, see Create a contract template.

Add a workspace action button for initiating a contract request

Define an action button in your workspace and map it to the built-in action that initiates a contract request.

Before you begin

Role required: admin

Procedure

1. Add initiate contract request functionality to your workspace.

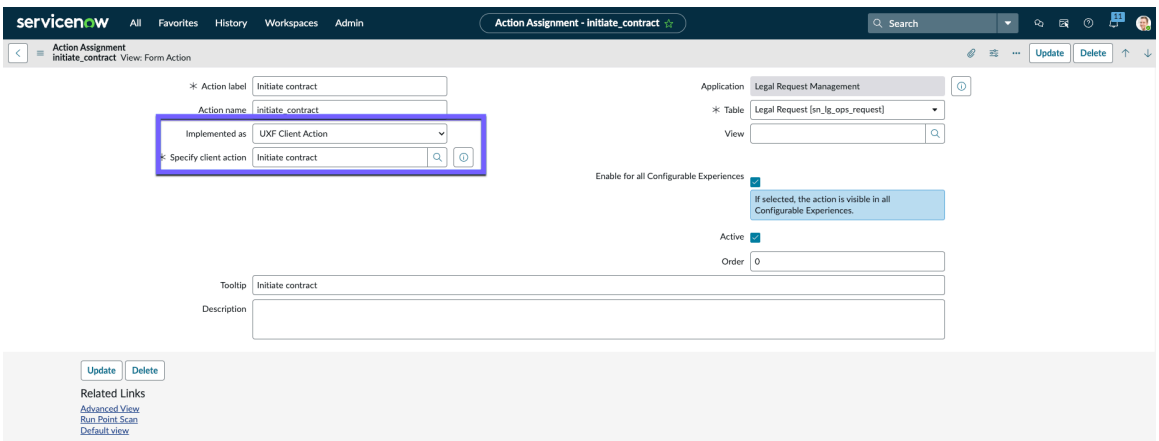
a. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **Form Actions**
For more information, see Customizing Configurable Workspace with declarative actions

b. Select **New**.

c. Set the action to the type UXF client action and map the action to the initiate contract request functionality and by entering the following field values.

Initiate contract request fields

Field	Value
Implemented as	UFX Client Action
Specify client action	Initiate contract



d. On the form, fill in the other fields.

For details, see Action assignment form

e. Right-click the form header and select **Save**.

2. Create an event mapping for the initiate contract declarative action.

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a. Select **Advanced view** listed under Related Links.

b. Select UX Add-on Event Mappings related list.

c. Select **New**.

d. In the Source Component field, select Action bar.

e. In the Source Declarative Action field, select initiate_contract.

f. In the Controller field, select Form.

g. In the Target Event field, select [Record Page] Open modal.

h. In the **Target Payload Mapping** field, define the fields to send by pasting the following JSON code.

```
{
    "container": {
        "fields": {
            "binding": {
                "address": [
                    "fields"
                ]
            },
            "type": "EVENT_PAYLOAD_BINDING"
        },
        "params": {
            "binding": {
                "address": [
                    "params"
                ]
            },
            "type": "EVENT_PAYLOAD_BINDING"
        },
        "route": {
            "binding": {
                "address": [
                    "route"
                ]
            },
            "type": "EVENT_PAYLOAD_BINDING"
        }
    },
    "type": "MAP_CONTAINER"
}
```

i. On the form, fill in the other fields.

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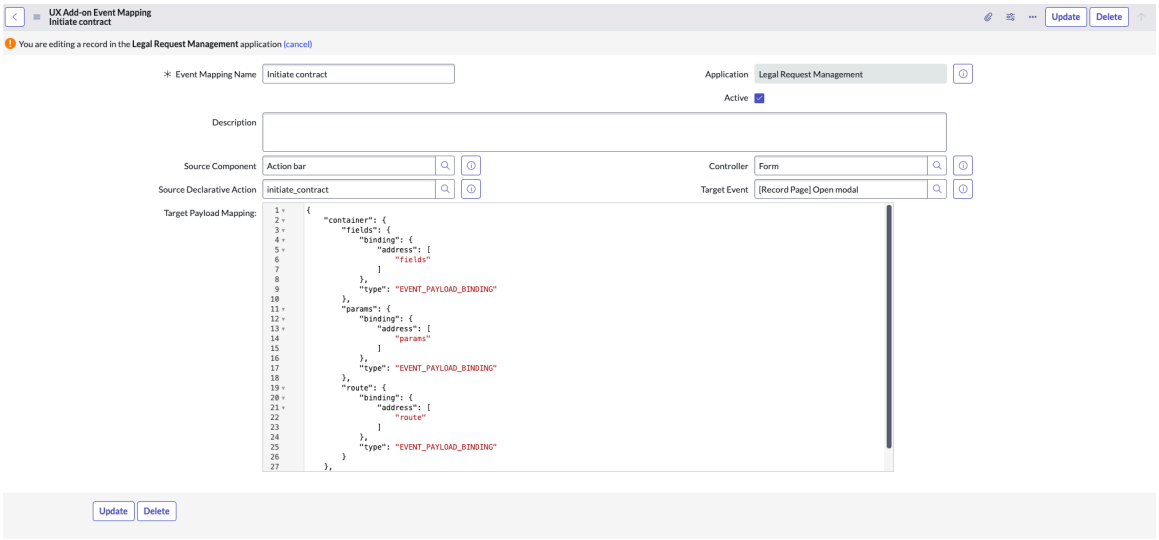


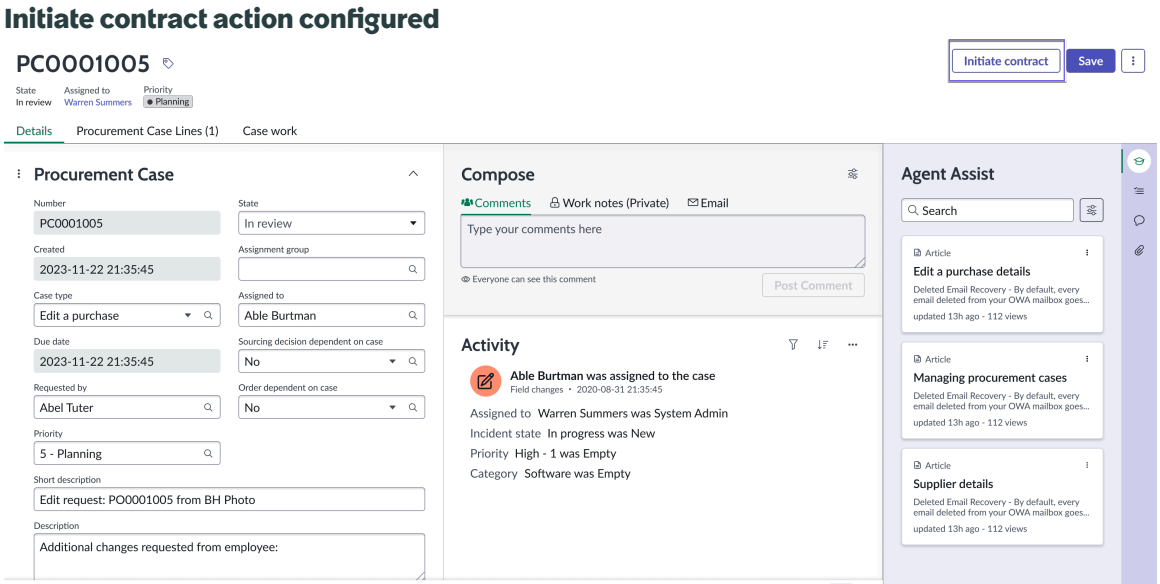
For a description of the field values, see UFX Add on Event mapping form.

j. Select **Submit**.

3. **Optional:** Configure visibility conditions for initiate contract action button.
   a. Select **Advanced view** listed under Related Links.
   b. Select to the Conditions related list.
   c. Set the conditions for the visibility of the action button.

Result

An action button to initiate contract requests from a contract record is available in your workspace.



Add Contract requests tab to the contract request record

As an administrator, add the ability to access contract request details to your form by adding the Contract requests tab.

Before you begin

Role required: admin

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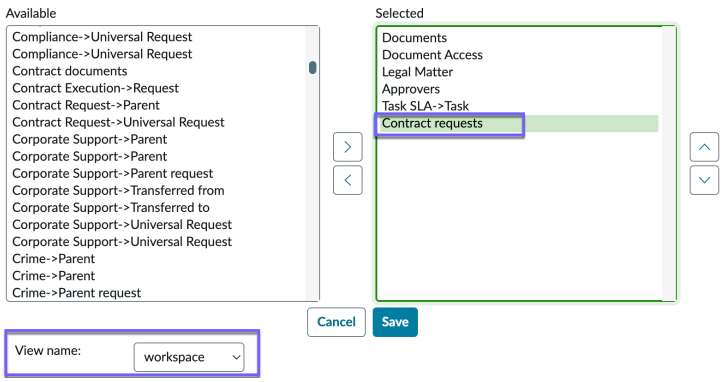
Procedure

1. Navigate to **All** > **System Definition** > **Tables**
2. Select the table to which your form is associated.
3. Right-click the context menu icon and select **Configure** > **Related Lists**.
4. In the **View** list, select the workspace view that should include the Contract Request tab.
5. Add the Contract requests tab by moving **Contract Request** from the Available list to the Selected list.

Add contract request related list

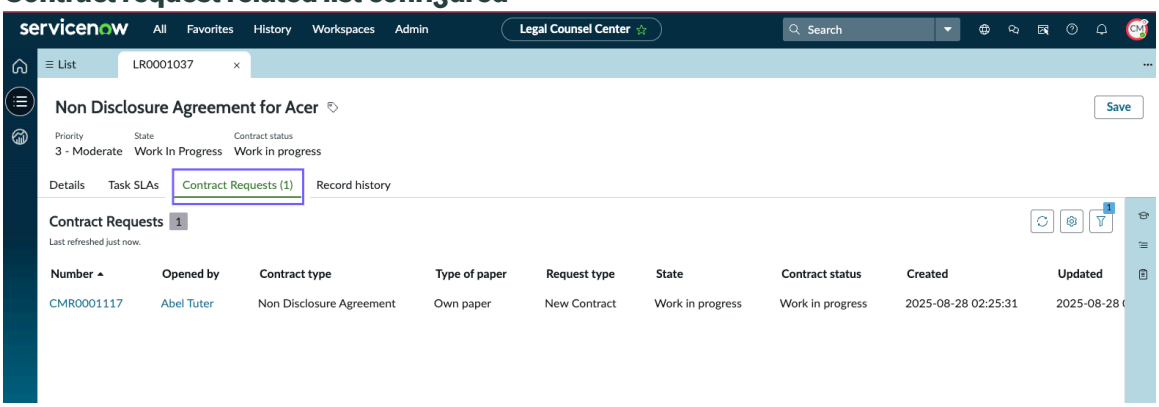


6. Select **Save**.
7. Select **Update**.

Result

The Contract requests tab is available your workspace to view the request details.

Contract request related list configured



For more information on roles required to work on contract requests, see Components installed with Contract Management Pro.

Add amendment tabs to contract repository record

To view the details of the contract amendment, add the amendment related tabs to the contract repository record.

Before you begin

Role required: admin

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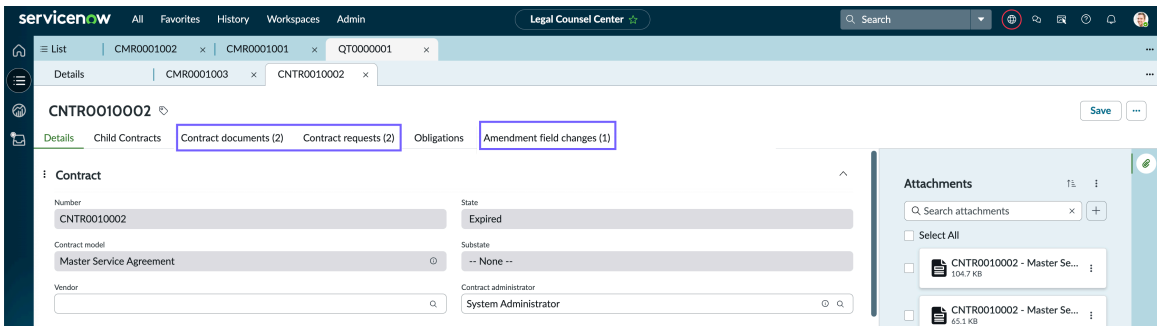
About this task

Once the contract amendment is signed, you can see the details in the following tabs of the contract repository record:

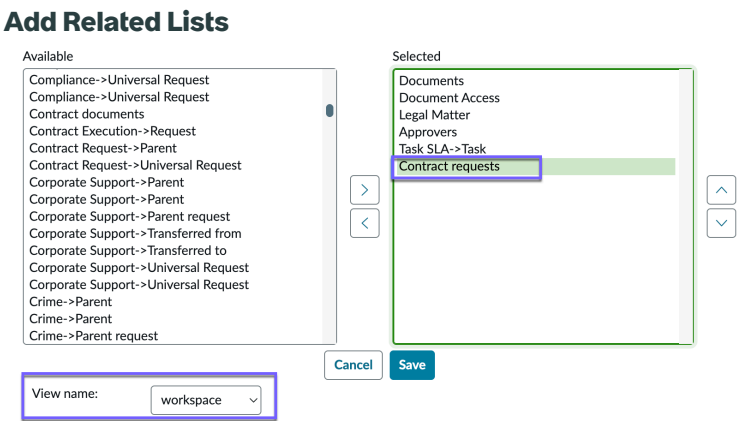
- Contract Documents: Provides access to all signed documents related to the contract, including those generated or updated as part of amendment processes.
- Contract Requests: Displays all contract and amendment requests associated with the contract.
- Amendment Field Changes: Shows a detailed log of all field changes made through amendments, enabling easy tracking of modifications over time.

You must add these tabs to the contract repository record for your workspace.



Procedure

1. Navigate to **All** > **System Definition** > **Tables**
2. Select the table to which your form is associated.
3. Select ☰ and select **Configure** > **Related Lists**.
4. In the **View** list, select the workspace view that should include the amendment related tab.
5. Add the Contract requests tab by moving **Contract Request**, **Contract documents**, and **Amendment history->Contract** from the Available list to the Selected list.



6. Select **Save**.
7. Select **Update**.

Result

The Contract amendment related tabs are available from your workspace to view the amendment details.

For more information on contract amendment, see Contract amendments.

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Add Contract documents tab to the contract repository record

Enable display of contract documents in a contract repository record by adding the Contract documents tab to it.

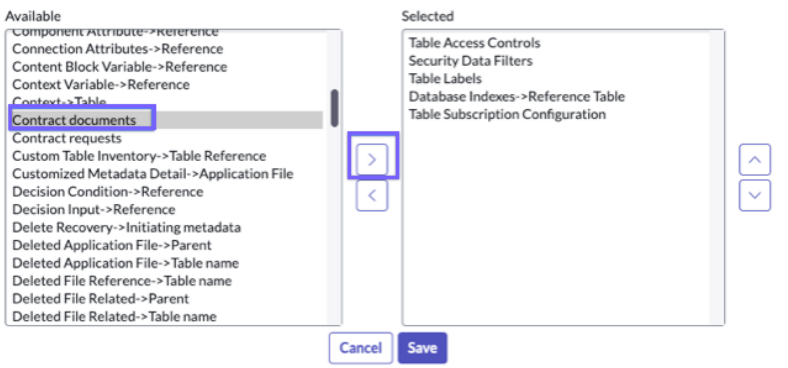
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**
2. Select the table configured as a contract repository.
   For more information, see Create a contract configuration.
3. Right-click the context menu icon and select **Configure** > **Related Lists**.
4. In the **View** list, select your workspace.
5. Add the Contract documents tab in contract repository records by moving **Contract documents** from the Available list to the Selected list.

Add contract documents related list

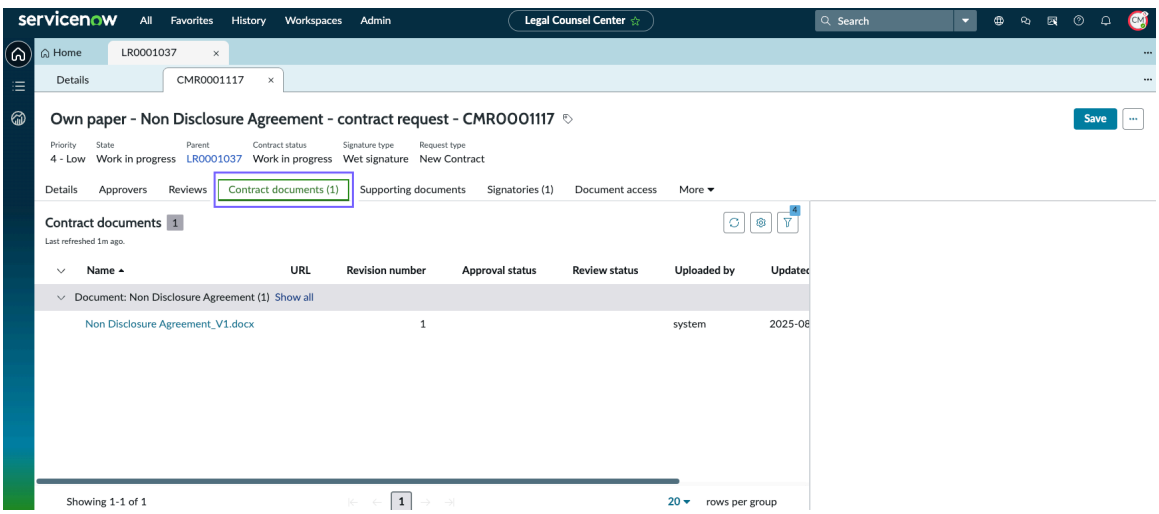


6. Select **Save**.
7. Select **Update**.

Result

The Contract document tab is available your workspace to view the contract documents and it's versions.

Contract document related list



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.

Copy fields from parent request to contract request

Configure the *ContractManagementExt* extension point to automatically copy required fields from the parent record to the contract request when it is initiated.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, enter *sn_cm_core.ContractManagementExt*.
3. Select the record.
4. In the Related Links section, select **Create implementation**.
5. On the Script Include form, fill in the fields.

   For a description of the field values, see Scripted Extension Point form fields.

6. In the **Script** field, update the copyDataFromBUToCMR function to configure the fields that you want to copy from the parent record to the contract request.
   For example, if you want to copy the **Account** and **End date** fields from a parent record to contract request, you can use the following:

```
copyDataFromBUToCMR: function(parentRequestGr) {
 return {
         data: {
          'account': parentRequestGr.getValue('account'),
          'end_date':
 parentRequestGr.getValue('contract_end_date'),
   }
  };
},
```

   Note: The data type of the parent record field and the contract request field must match.

7. Select **Update**.
8. In the Extension Point form, select **Update**.

Result
When a contract request is initiated, the configured fields are automatically populated with the corresponding values from the associated parent record.

Group contract documents by contract type in a contract request

As an administrator, group the contract documents by contract type in a contract request.

Before you begin
Role required: admin

About this task

Note: In Legal Counsel Center and Contract Workspace, the contract documents are grouped based on the contract type, by default.

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Customize the Standard Record Page (SRP) to display contract documents grouped by contract type in the Contract document tab through UI Builder, a web user interface builder. For more information, see UI Builder.

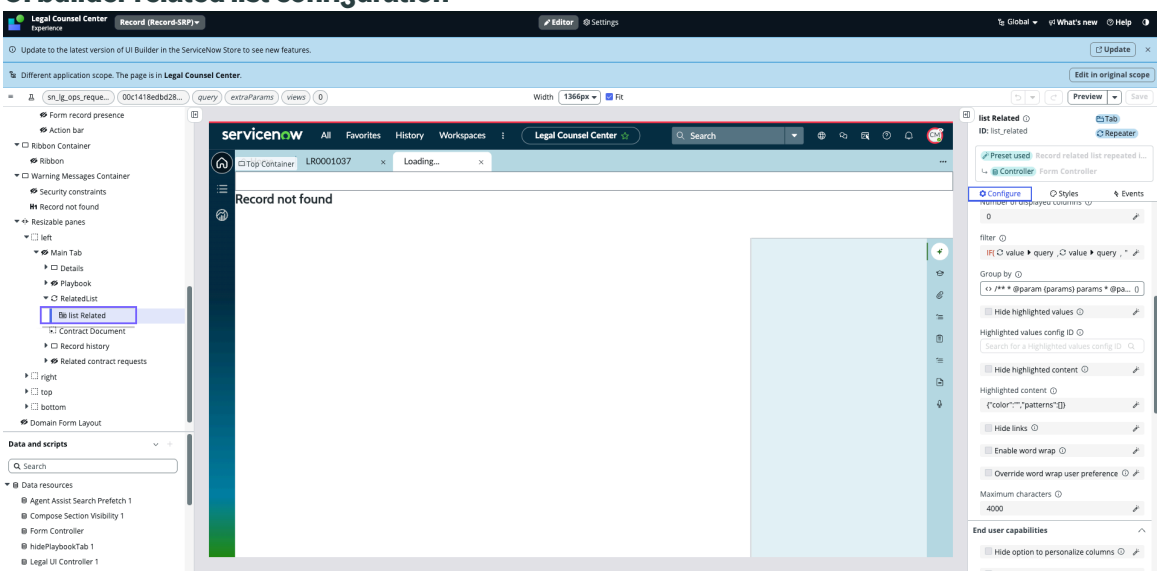
Contract document grouping



Procedure

1. Navigate to **Now Experience Framework** > **UI Builder**.
2. Search and select your workspace.
3. Navigate to **Record** > **SRP record**.
4. In the Page content list, under **Body** > **Resizable panes** > **left** > **Main Tab** > **Related List**, select **list related**.

UI builder related list configuration



5. In the **Configure** pane, select **Group by** field.

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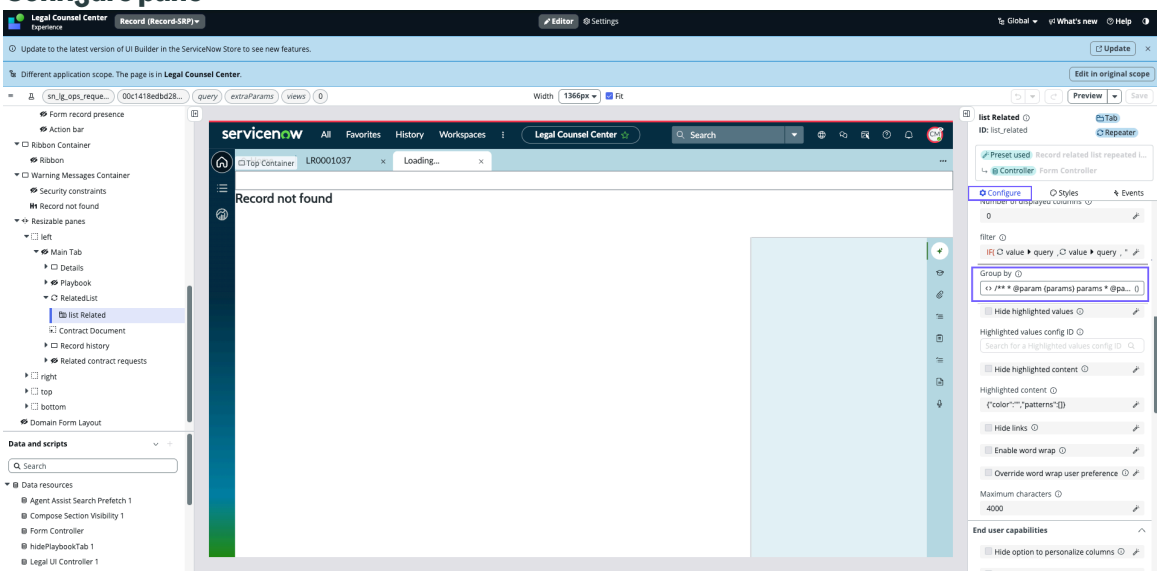
Configure pane



6. Enter the following code in the **Group by** field:

```
function evaluateProperty({api, helpers}) {
  var isContractRequestForm = api.item.value.parentTable
 =="sn_cm_core_contract_request";
  var isContractRevisionTab = api.item.value.table ==
 "sn_cm_core_document_revision";
  if( isContractRequestForm && isContractRevisionTab){
    return 'document';
  }
return '';
}
```

Note: If the field is not editable, select the scope applicable to your workspace in the **Select an application** drop-down list at the top of the page.

7. Select **Apply**.

Result

The contract documents will be grouped by contract type in the Contract document tab while viewing a contract request.

Add access to obligation management from contract repository records

As an administrator, add the Obligations tab in contract repository records to manage contract obligations.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Contract** > **Contracts** > **All**.
2. Select a contract record.
3. Right-click the context menu icon and select **Configure** > **Related Lists**.
4. In the **View** list, select the workspace view that should include the Obligations tab.

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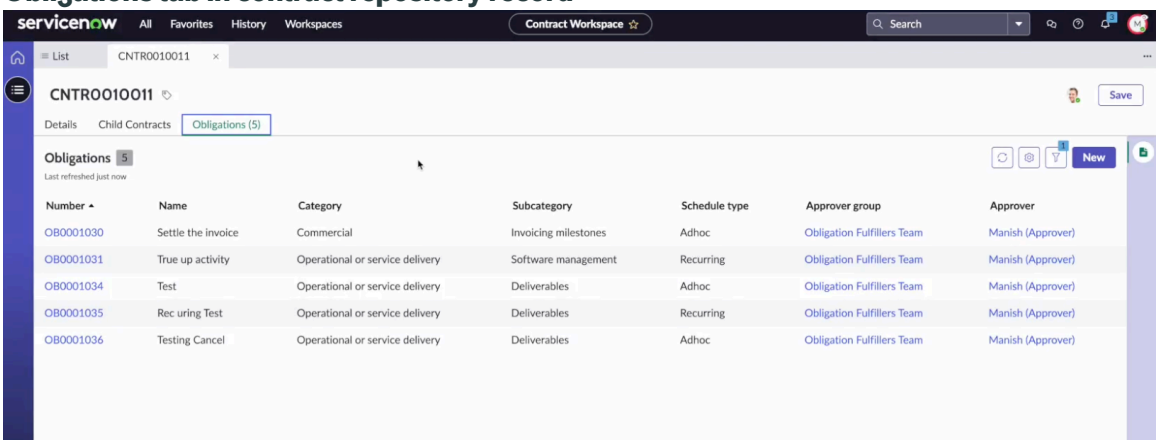
5. Add access to obligation management by moving **Obligation** from the Available list to the Selected list.
6. Select **Save**.
7. Select **Update**.

Result
The Obligations tab will appear in contract repository records.

Obligations tab in contract repository record



For more information on roles required to work on obligation management, see Components installed with Contract Management Pro.

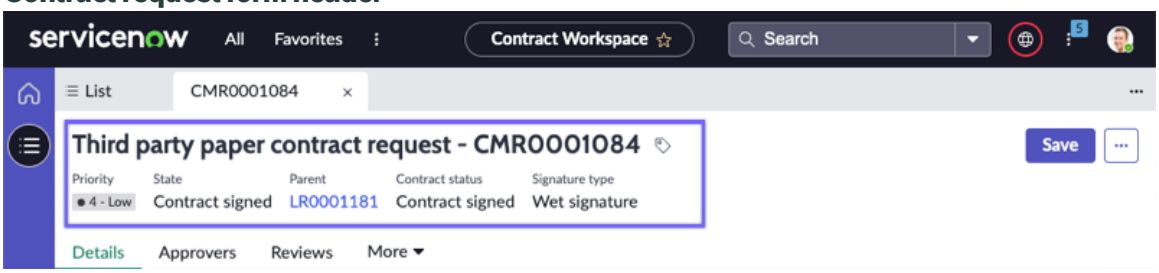
Configure the contract request form header for your workspace

As an administrator, configure the header of the contract request form for your workspace.

Before you begin
Role required: admin

About this task
The form header contains a primary field and secondary fields. You can add your workspace to the base system form header tables to specify the fields that appear in a contract request header for your workspace.

Contract request form header



Procedure
1. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.
2. In the **Table** column, select the UX Form Header tables related to the contract form.

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Contract request form fields	Table
Short description, Priority, Contract state, Parent record, Contract status, and Signature type.	sn_cm_core_contract_request
Participant name	sn_cm_core_signer_task
Name of the document, requester of the contract request, latest version of the document, storage details and the folder where the document is stored	sn_cm_core_document and select it.

3. Select the **UX Header Configurations** tab.
4. Select **Edit**.
5. Select your workspace from the Available list and move it to the Selected list.
6. Select **Save**.
7. Select **Update**.

Assign a role for configuring template mappings

Enable a contract user to configure information placed in the contract document by assigning a contract configurator role.

Before you begin
Role required: admin

About this task
Template mappings automatically insert default information in the contract document. To configure template mappings, the contract user requires a contracts configurator (sn_cm_core.contract_config) role.

Procedure
1. Navigate to **All** > **User Administration** > **Users**.
2. Search for and select the user.
3. In the Roles related list, select **Edit**.
4. Move the sn_cm_core.contract_config role from the Available list to the Selected list.

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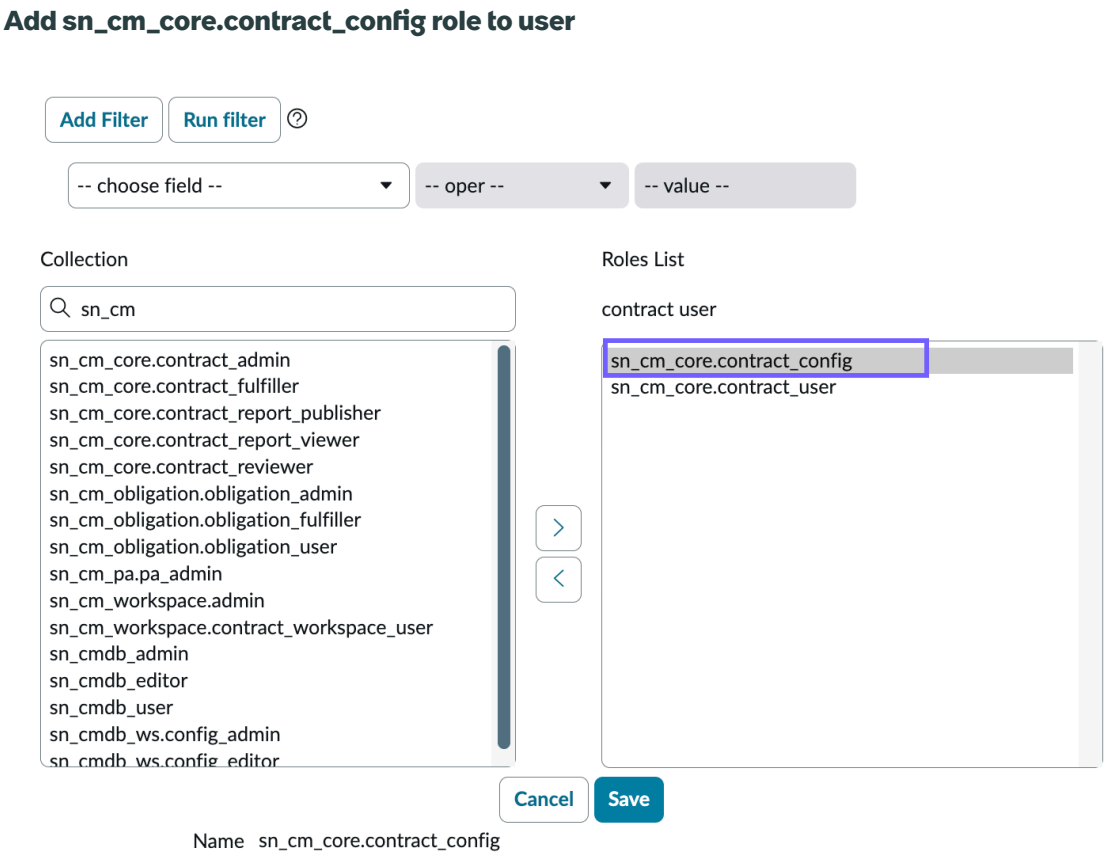

5. Select **Save**.
6. Save the user record by selecting **Update**.

Result

The user who with the sn_cm_core.contract_config role can update template mappings to pre-fill information that's placed in the contract document. For more information, Update contract template mappings.

Enable contract request fields in condition builders

As an administrator, provide access to contract request fields so they can be selected in condition builders.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**
2. Select the application table whose variables should be used in condition builders.
3. Add the contract request as a reference field to the table.
   a. Select the **Columns** tab and select **New**.
   b. In the **Type** field, select the Lookup using list icon ( ) and search for `Reference` and select it.

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c. In the **Column label**, enter unique label for the column.

d. In the **Column label**, enter unique field name of the column.

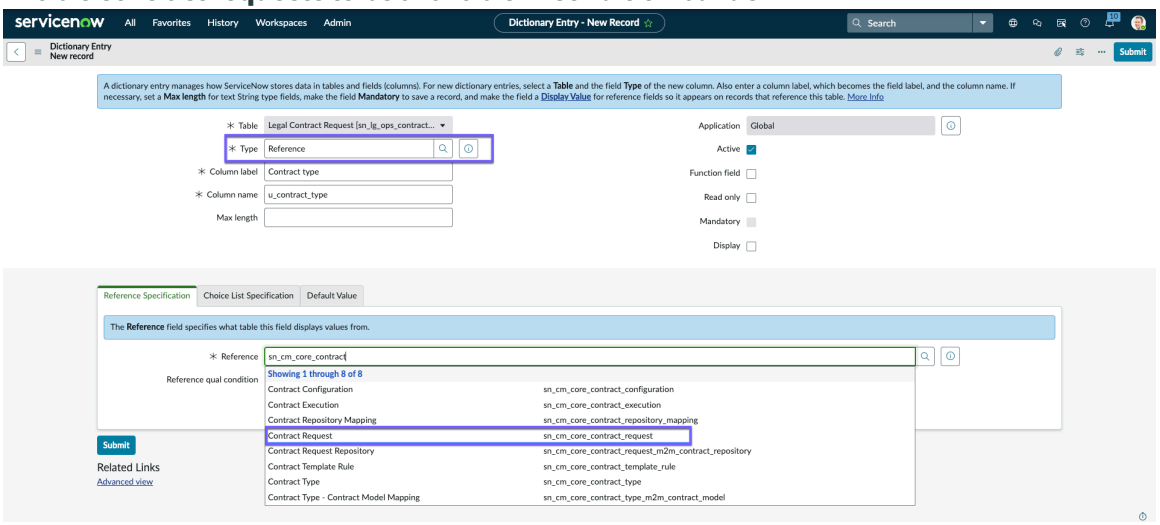
e. Select **Reference Specification** tab.

f. In the **Reference** field, select the Contract Request [sn_cm_core_contract_request] table.

g. On the Dictionary entry form, fill in the fields.
For more information, see Dictionary entry form.

h. Select **Submit**.

Enable contract requests to be available in condition builder

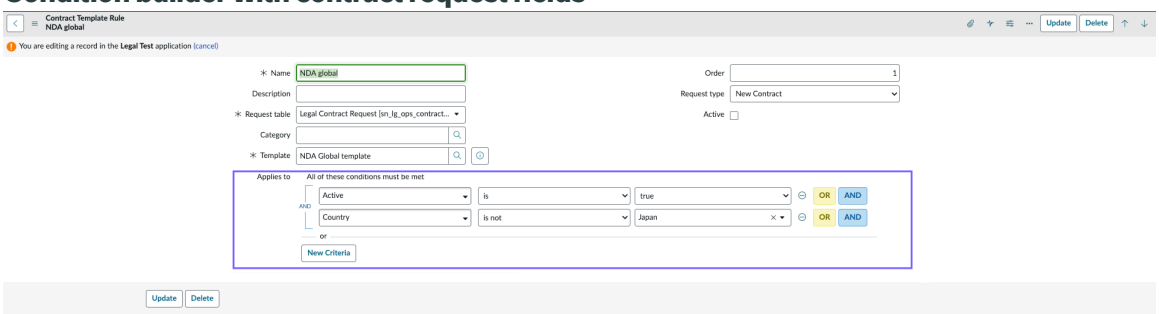


4. Select **Update**.

Result

The contract request fields are available for selection in the condition builder.

Condition builder with contract request fields



Configuring the Playbook tab on contract repository records

Configure the visibility of the Playbook tab on contract repository records so contract managers can review and act on AI-extracted metadata and obligations.

The playbook appears on the contract repository record when the Now Assist in Contract Management plugin is installed for your workspace. If the playbook tab is not configured in the base system for your workspace, you must configure the playbook tab to control its visibility.

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The visibility of the Playbook tab is controlled by a data broker. The conditional logic is provided as a script method, `sn_cm_gen_ai.ContractsMetadataExtractionHelper()` in a Script include file. To invoke this action, create a method in one of your Script include files for your workspace, which can be accessed by the data broker linked to your workspace on the UI Builder.

1. Add a script include method for the Playbook tab
2. Add a data broker server script for the Playbook tab
3. Add the data broker to your workspace page
4. Configure the Playbook tab component for your workspace
5. Configure obligation review for the playbook

Add a script include method for the Playbook tab

Add a script include method that controls the **Playbook** tab visibility on the contract repository record by verifying plugin availability and applying conditional logic.

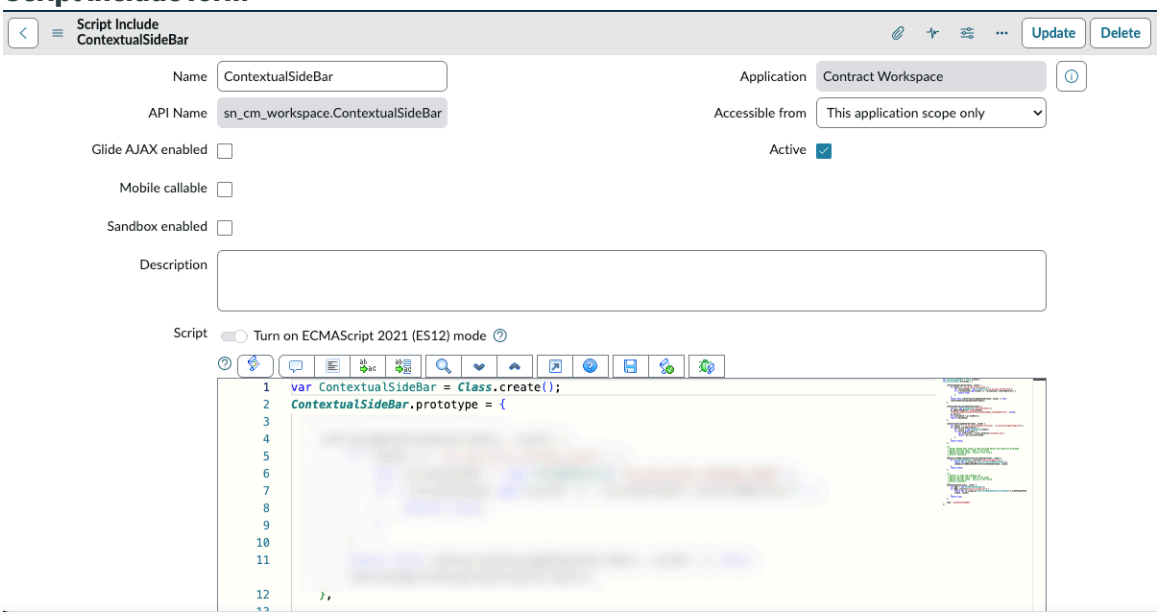
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
   The Script Includes table appears.
2. In the **Name** column, search for the Script Include where you want to add the method.
3. Open the Script Include record.

Script include form



4. In the **Script** box, add the following method.

```
hidePlaybookTab(table, sysId) {
                        var pMgr = new GlidePluginManager();
                        if (pMgr.isActive("com.sn_cm_gen_ai"))
 {
```

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```
                        return new
 sn_cm_gen_ai.ContractsMetadataExtractionHelper().hidePlaybookT
ab(table, sysId);
                        }
                        return true;
                        },
```

This method checks if the Now Assist in Contract Management (com.sn_cm_gen_ai) plugin is active. If the plugin is not active, it returns `true` hiding the tab by default.

5. Select **Update**.

Add a data broker server script for the Playbook tab

Configure a data broker server script that connects the UI Builder component to the script include method controlling the **Playbook** tab visibility.

Before you begin

Role required: admin

Procedure

1. Navigate to the **All** menu and enter `sys_ux_data_broker_transform.list`.
   The Data Broker Server Scripts table appears.
2. Select **New**.
   The Data Broker Server Script form opens.

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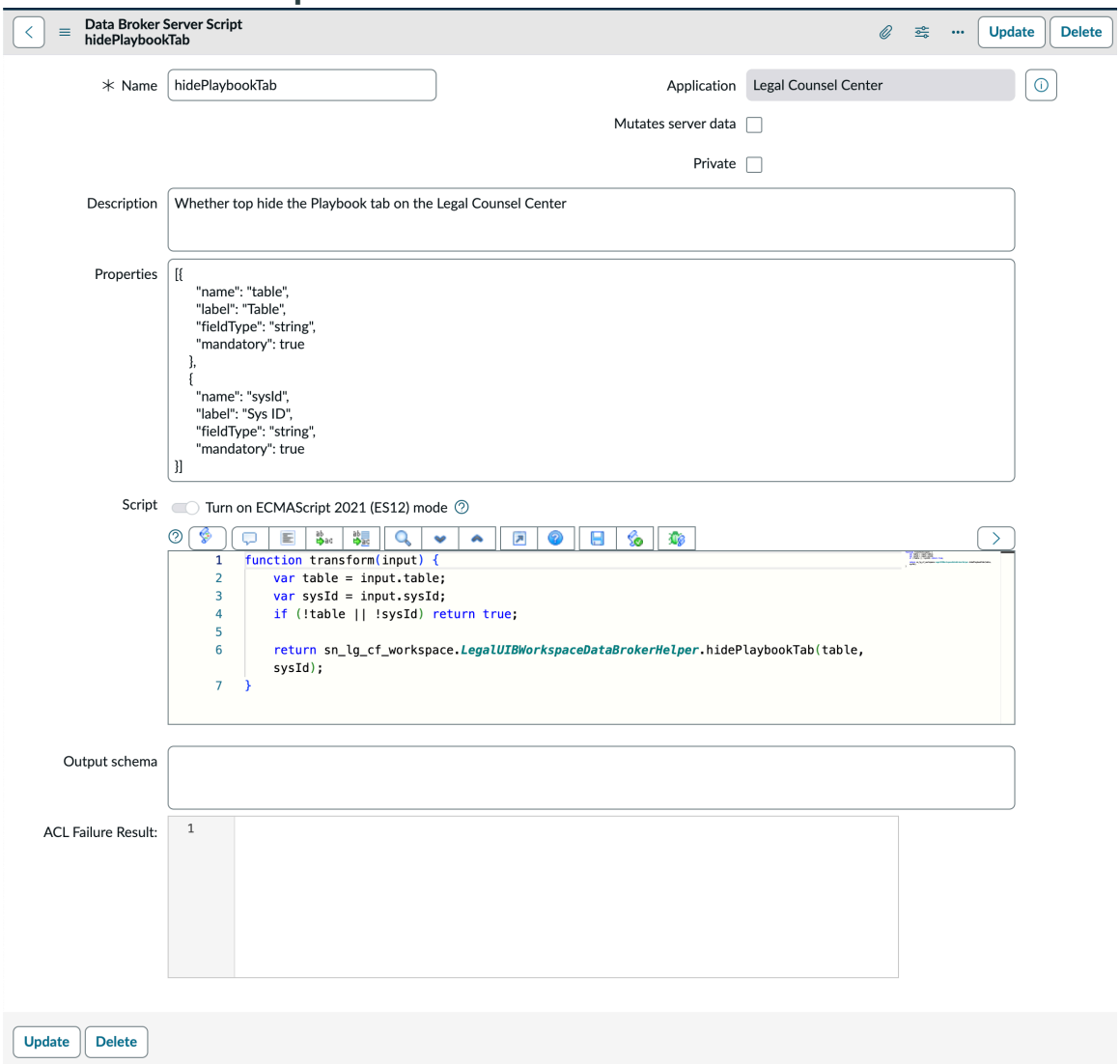
Data Broker Server Script form



3. In the **Name** field, enter the name for your configuration.
4. In the **Application** field, select the appropriate application scope for your implementation.
5. In the **Description** field, enter a description.
   For example, `Whether to show or hide the Playbook tab on the Legal Counsel Center`
6. In the **Properties** field, add the following JSON configuration:

```
[{
                        "name": "table",
                        "label": "Table",
                        "fieldType": "string",
                        "mandatory": true
                        },
                        {
                        "name": "sysId",
                        "label": "Sys ID",
                        "fieldType": "string",
                        "mandatory": true
                        }]
```

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7. In the **Script** field, add the script for the data broker.
   Example:

```
function transform(input) {
                        var table = input.table;
                        var sysId = input.sysId;
                        if (!table || !sysId) return true;

                        return
 sn_lg_cf_workspace.LegalUIBWorkspaceDataBrokerHelper.hidePlaybookTab(table, sysId);
                        }
```

   This function receives the table and sysId from the input, validates them, and calls the helper method to determine tab visibility.

8. Select **Update** to save the data broker server script.

Add the data broker to your workspace page

Add the data resources to your page in the UI Builder to dynamically expose data from tables, records, or other elements on your page.

Before you begin

Role required: ui_builder_admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Experiences** tab.
3. Open your workspace.
4. Select the page on your workspace where you want to configure the **Playbook** tab.

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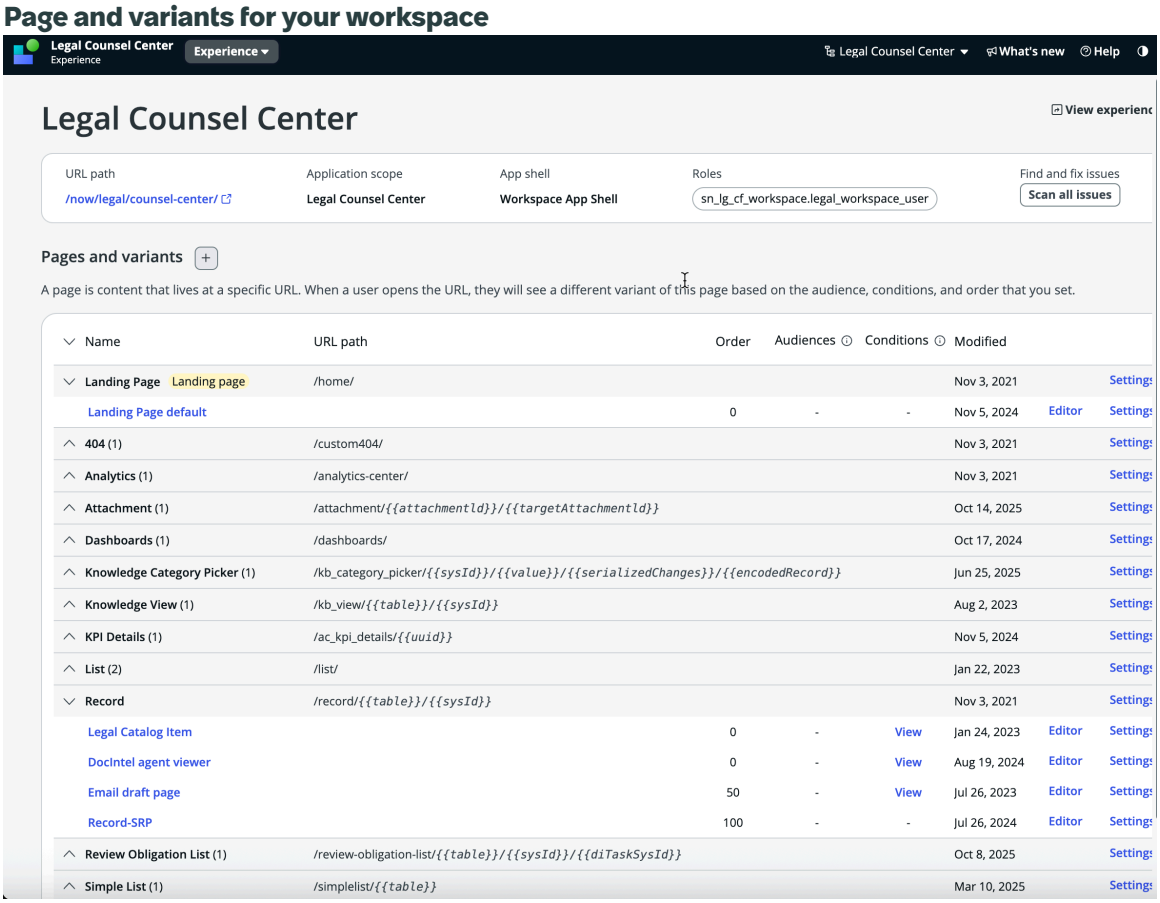

5. Select **+** in the Data resources drawer.

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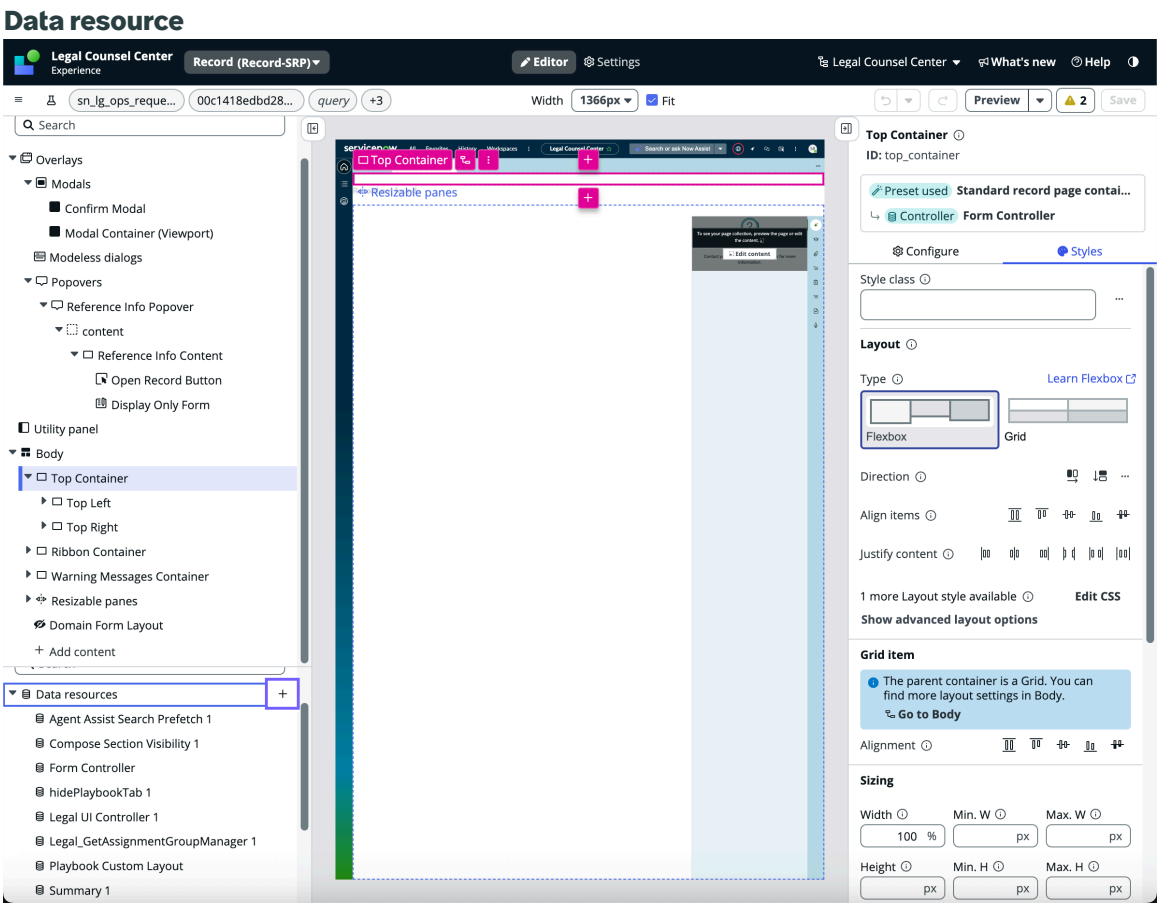
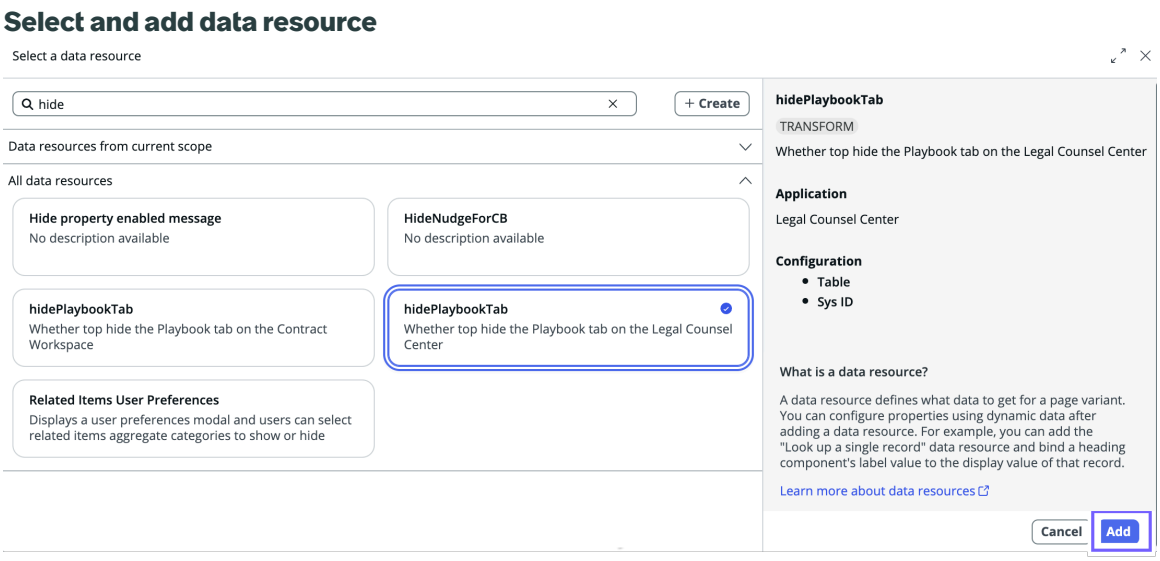


6. Search for the data broker you configured for the **Playbook** tab.
7. Select the data broker and then select **Add**.



The Data Resource configuration modal appears.

8. In the **Configuration** tab, select the record table and record sysid.
9. Select **Save** on the UI Builder header.

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Configure the Playbook tab component for your workspace

Use the Tabs component in UI Builder to configure the **Playbook** tab on the contract repository record page for your workspace.

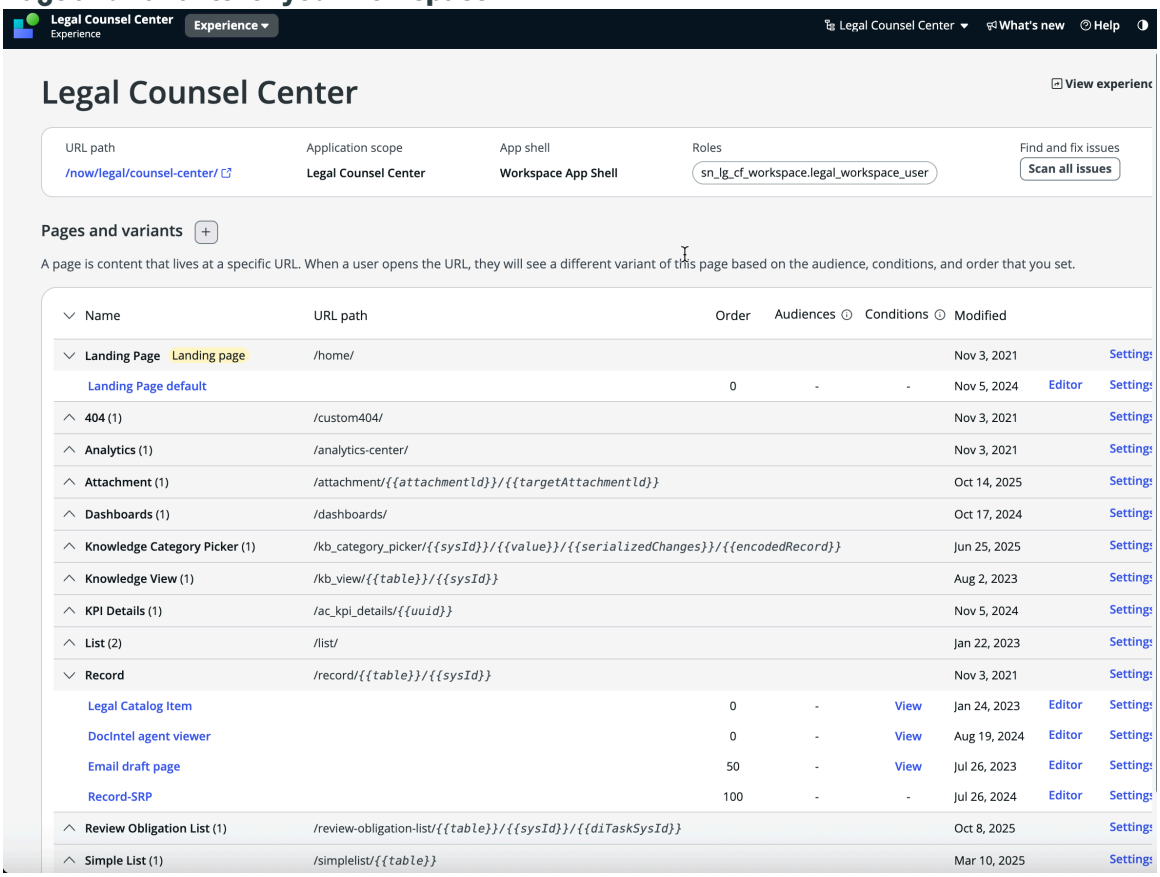
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Experiences** tab.
3. Open your workspace.
4. Select the page on your workspace where you want to configure the **Playbook** tab.

Page and variants for your workspace



5. Select the **Main Tab** component.

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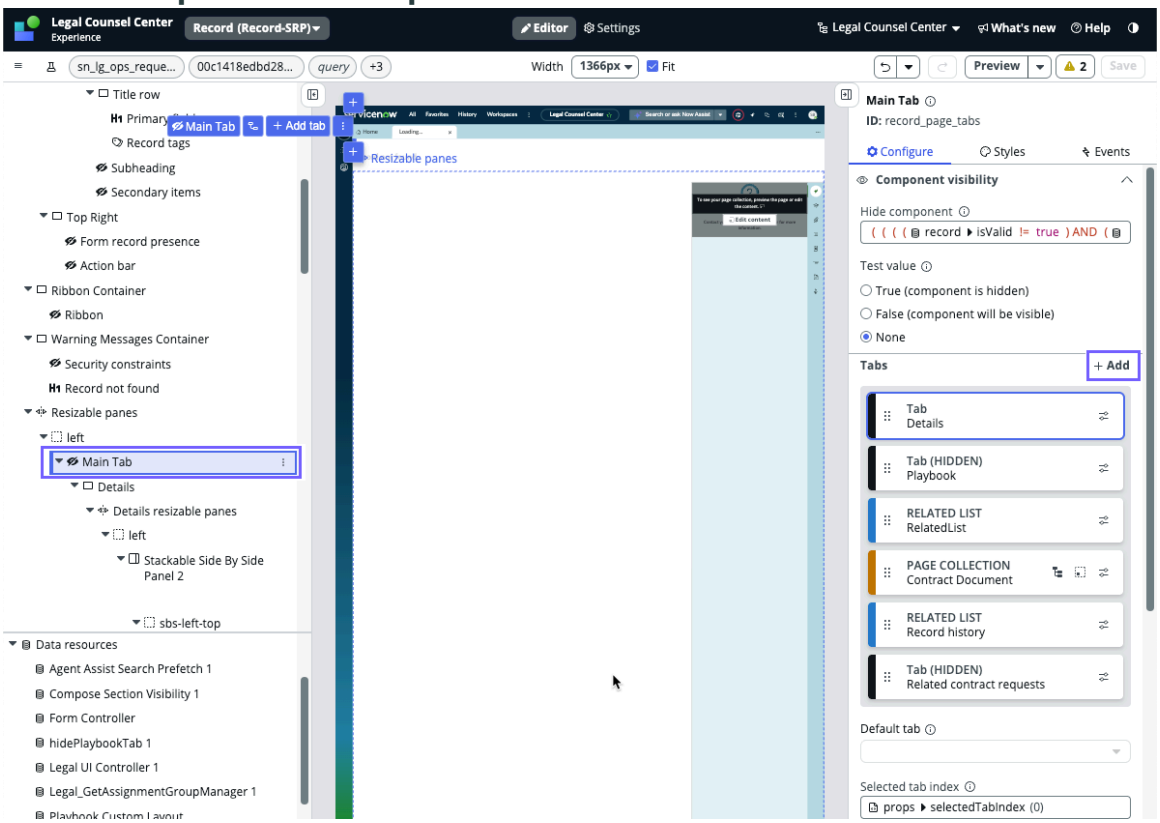
Main tab component on the left pane



6. Select **Add** under the **Tabs** section.
7. In the pop-up window, select **Start from an empty container**.
8. Select **Next**.
9. On the form, fill in the fields.

    a. In the **Tab label** field, enter `Playbook`.
    The **Tab ID** field is automatically updated.

    b. On **Hide tab**, hover over the field and select the option to bind the data broker configured for the playbook.
    For more information, see Connect data to your components.

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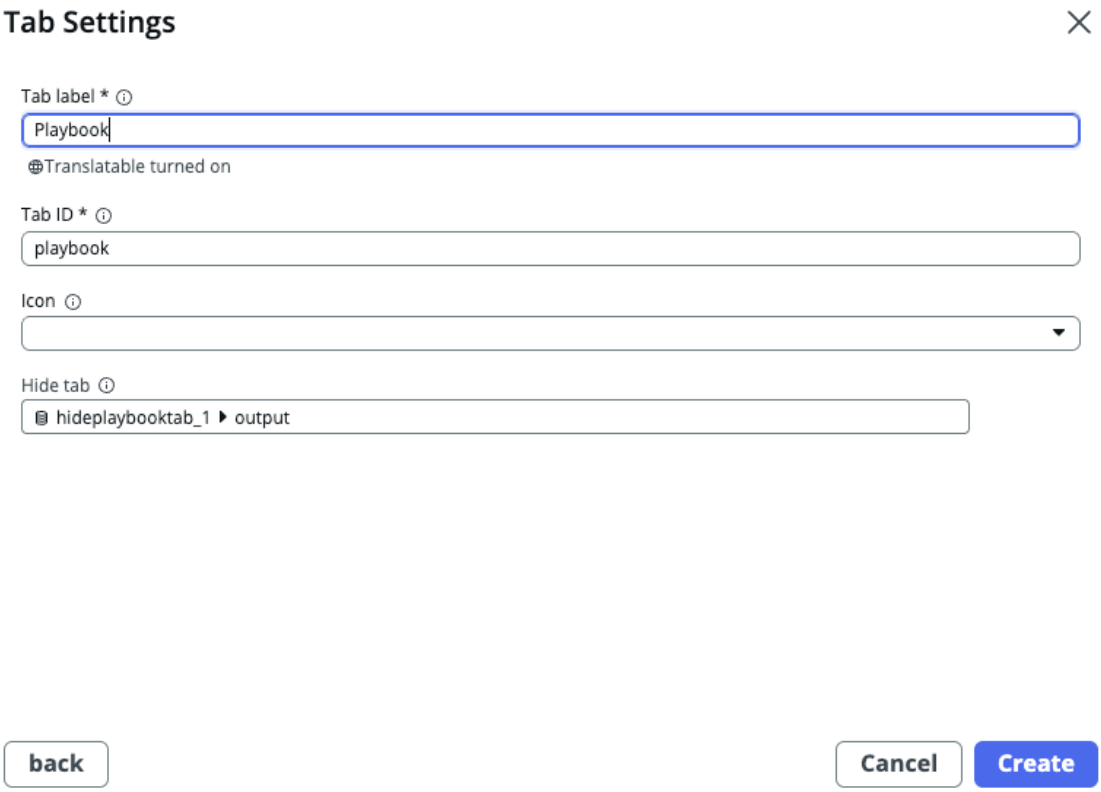
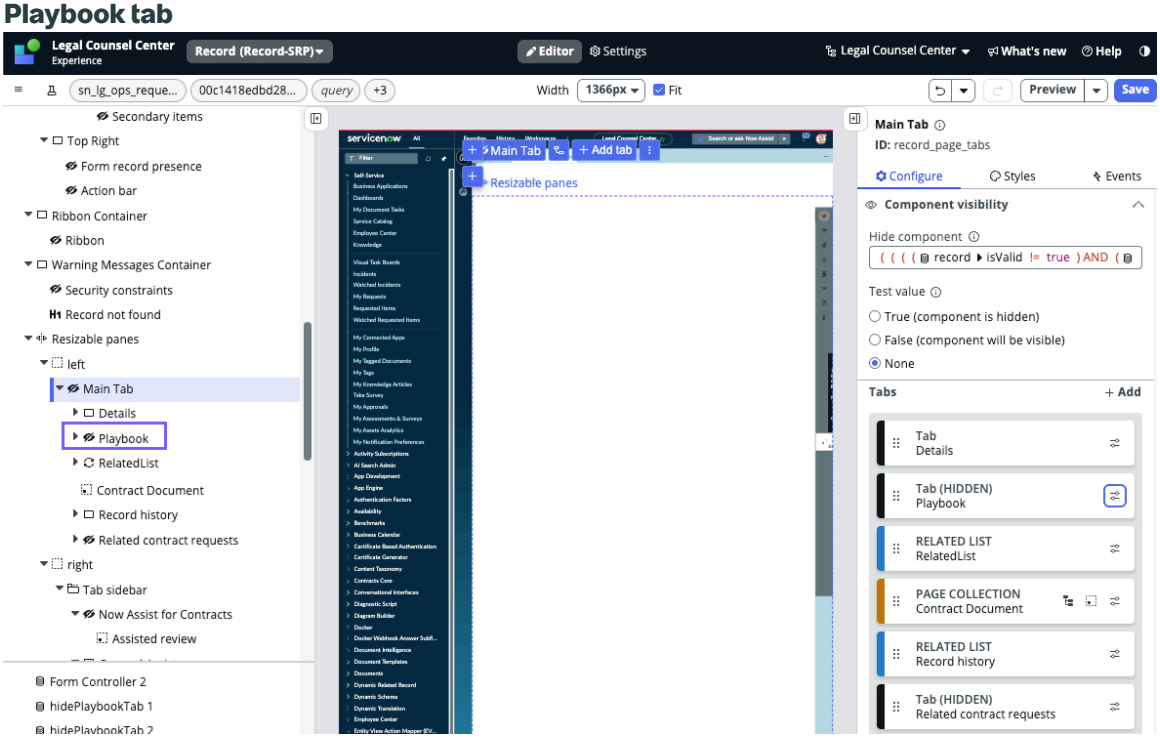
Connect data broker to the tab component



c. Select **Create**.

The new tab appears under the **Main tab** component.

Playbook tab



10. Expand **Playbook** and then select **Add content**.

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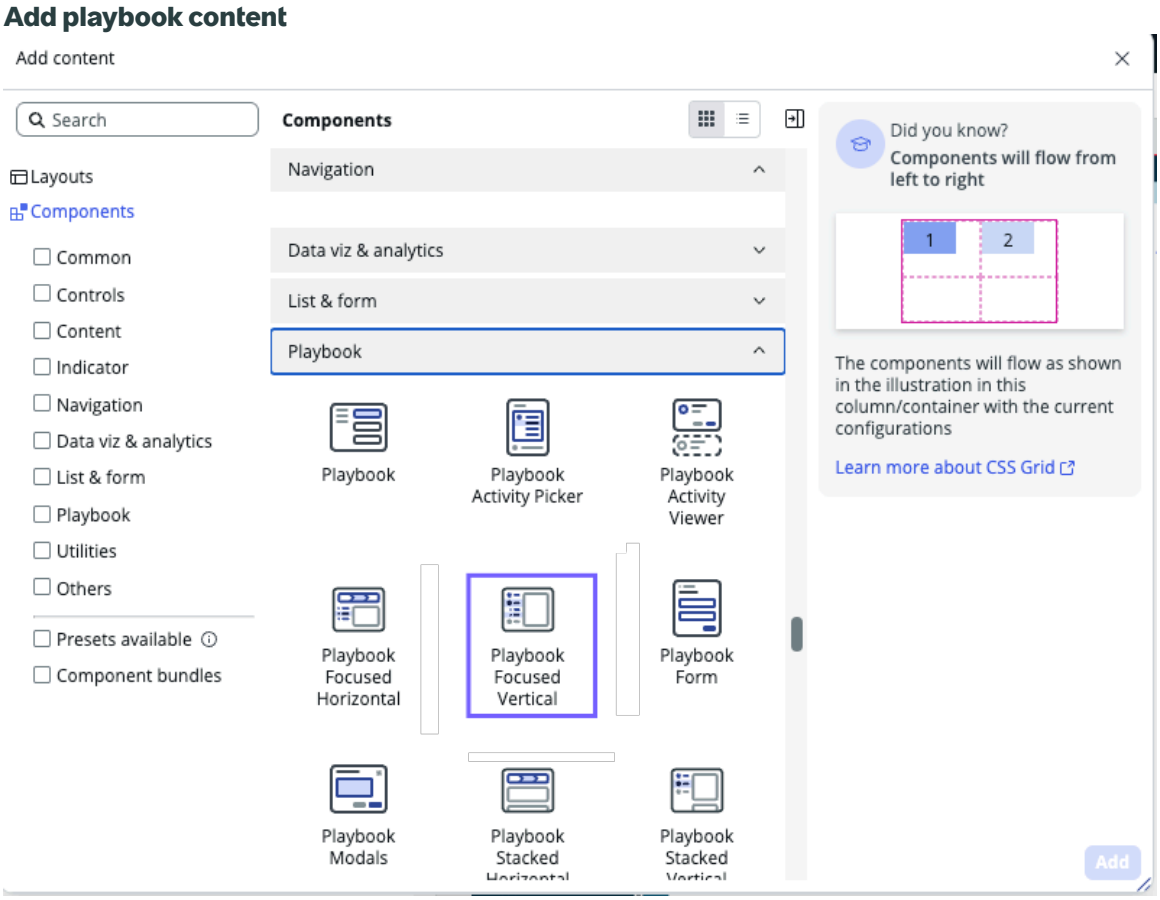
11. In the Add content window, select **Playbook Focused Vertical** and then select **Add**.



12. In the Data resources drawer under the Data and scripts section, select **Playbook Custom Layout**.

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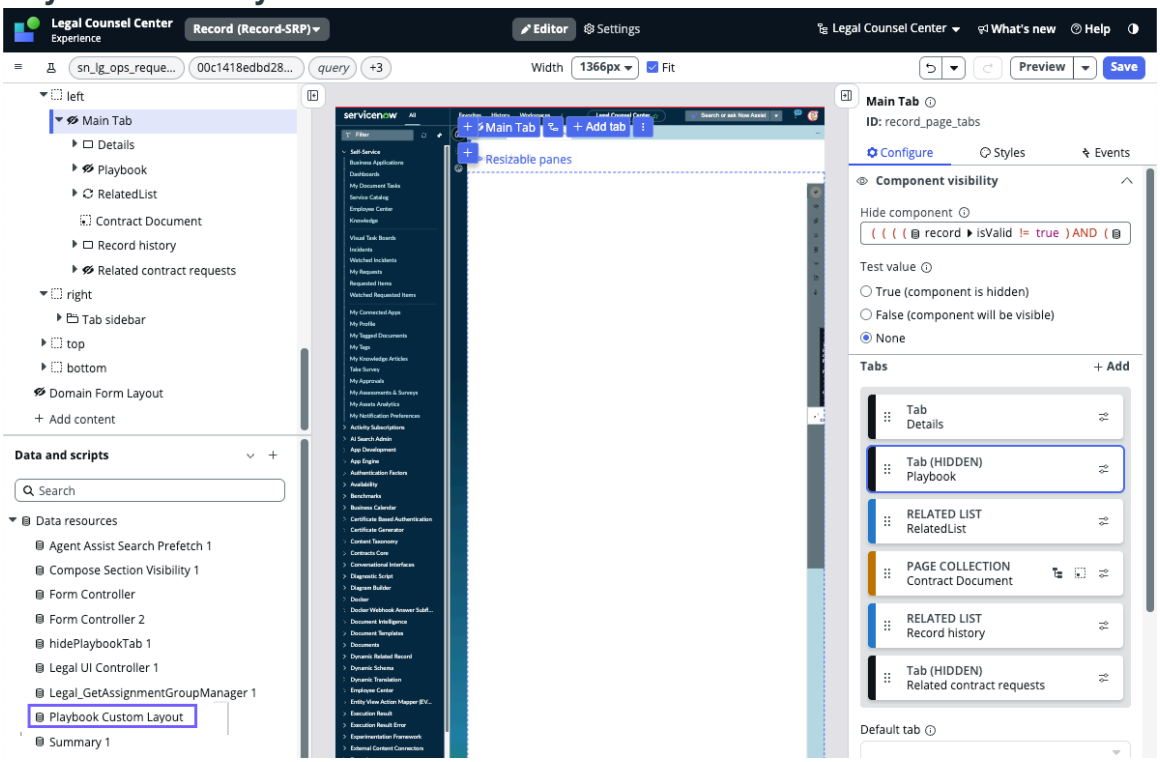
Playbook custom layout



The Playbook configuration modal appears.

13. In the **Configuration** tab, do the following:
    a. In the **Parent SysID**, select the record sysid under `props`.
    b. In the **Parent Table**, select the record table under `props`.
    c. In the **Playbook Experience**, select `Contract Metadata Extraction Playbook`.
14. Select **Save** on the UI Builder header.

Configure obligation review for the playbook

Create a page in UI Builder that uses a viewport component to dynamically load obligation review content in the playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Experiences** tab.
3. Open your workspace.
4. Create a new page by selecting the **+** icon.

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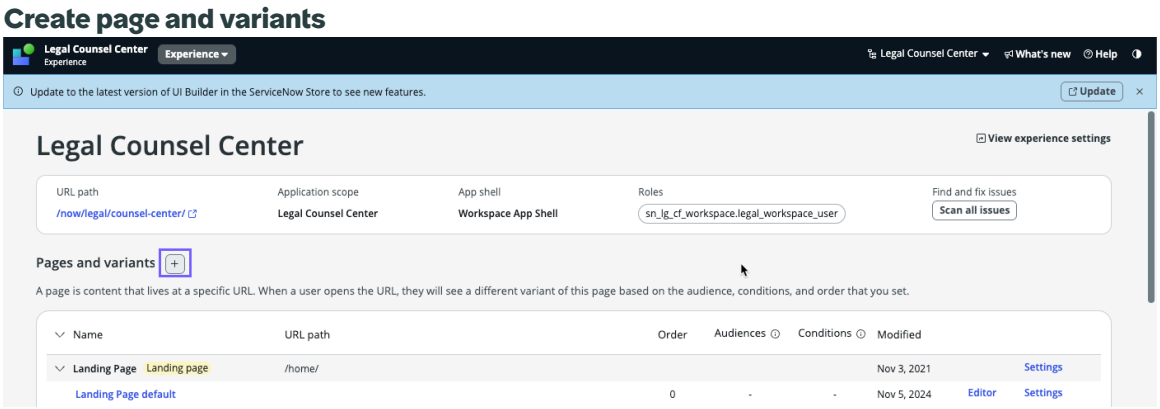

5. Select **Create from scratch instead**.
6. On the form, enter the `Review Obligation List` in the **Name** field.
   The **URL path** will be automatically updated with `review-obligation-list`.
7. Select **Looks good**.
8. Complete the remaining steps to create the page.
   For more information, see Create a page in UI Builder.
9. Add a viewport component for the page.
   For more information on adding a viewport, see Add a viewport component to your page.
   a. In the configuration panel, select **+ Add** to attach the **Now Assist in Contract Management** page collection.
   b. Select **Apply default configuration with added URL parameters** and then select done.
10. Create a client script for the page.
    For more information on adding a client script, see Define and bind client scripts to components.

    a. Select **+** next to **Client scripts**.

    b. Name your script.

    A descriptive name helps you know what the script does. It also makes it easier to find the script later when you add it to an event handler.

    c. Add the following script.

```
function handler({api, event, helpers, imports}) {

api.emit("MACROPONENT_VIEWPORT_LOAD_REQUESTED", {

viewportElementId: 'viewport_1',

route: 'review-obligations',

fields: {

'cntrSysId': api.context.props.sysId,

'diTaskSysId': api.context.props.diTaskSysId

},
```

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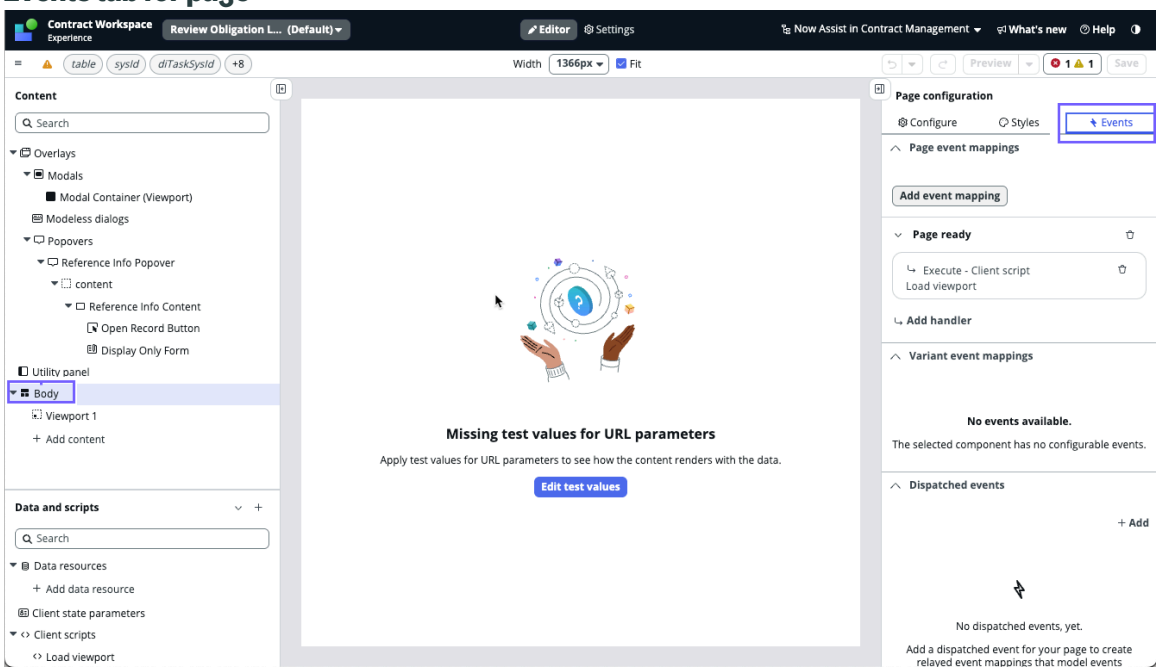
```
params: {}

});

}
```

d. Select **Apply**.

11. Select the **Body** component and then select the **Events** tab under **Page configuration**.

Events tab for page



a. Select **Add handler** under the **Page ready** section.

b. Select the client script created in step 10.

c. Select **Continue**.
The client script is bound to the Page ready event. When the page loads, this event handler automatically executes the client script.

12. Optional: If **Form Controller** is available under Data resources, remove it.

13. Navigate to the **General** tab under **Settings** and verify that *`table`*, *`sysId`*, and *`diTaskSysId`* are available under the **Required parameters**.
If the parameters are not available, add them manually. For more information on modifying the page settings, see Edit page variant settings.

Using Contract Management Pro

Use Contract Management Pro to initiate and manage contract requests for self served and non-self served contracts.

Contract Workspace

As a contract fulfiller, you can work with the actionable widgets on Contract Workspace to categorize, prioritize, and efficiently work on contract requests.

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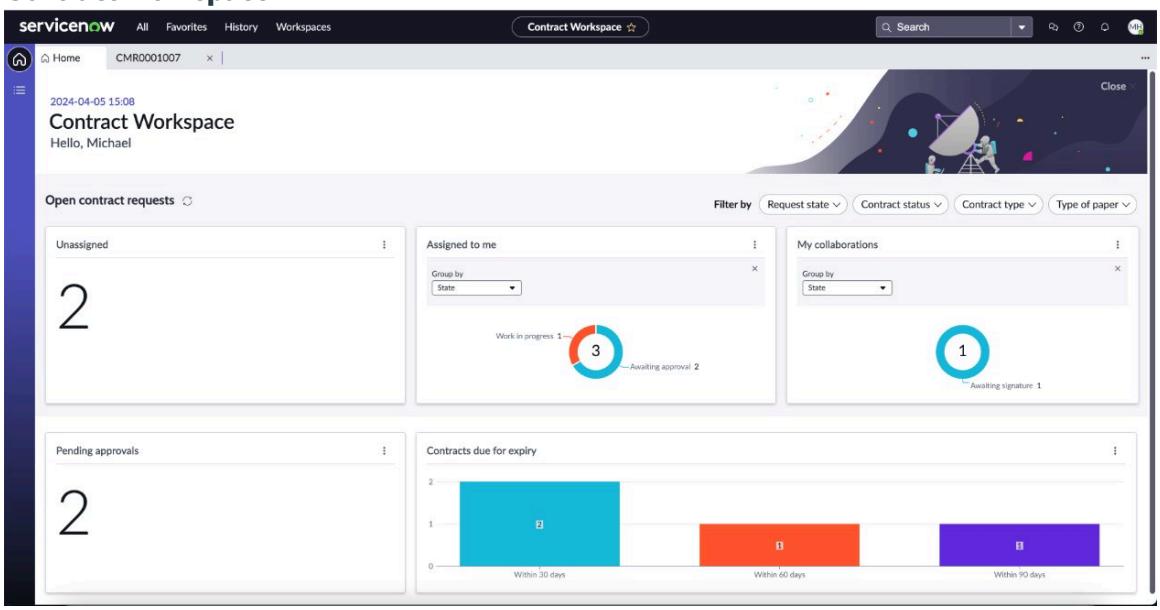
The Contract Workspace homepage provides information on open contract requests, document revisions pending approval, and contracts due to expire. Selecting a widget to displays the related list of contract requests on a separate page. For Donut widgets, you can use the **Group by** filter to view the contract requests by state, status, or type of paper.

Contract Workspace



Widgets on Contract Workspace

Name	Type	Description
Unassigned	Score 	Number of contract requests that are unassigned.
Assigned to me	Donut 	Number of contract requests assigned to you.
My Collaborations	Donut 	Number of contract requests to which you have been added as a collaborator.
Pending approvals	Score 	Number of contract requests assigned to you for approving a contract document revision that are pending.
Contracts due for expiry	Bar 	Number of expiring contracts that you have executed. The contracts are grouped by the number of days before the contract expires.

The Contract Workspace is built through the configurable UI Builder application. For more information, see UI Builder.

Access to the Contract Workspace requires activation of the Contract Workspace plugin. For more information, see Activate Contract Workspace.

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Contract Workspace benefits

The Contract Workspace enables contract fulfillers to more efficiently handle contract requests.

Benefits of Contract Workspace features

Benefit	Feature
Overview of open contract requests, pending document revision approvals, and contracts that due to expire.	User action widgets
Ability to view only the open contract requests that require your immediate attention.	Filtering capabilities
More relevant search results with the advanced ServiceNow® AI Search engine.	AI Search

Initiating a contract or amendment request

As a case owner or fulfiller, initiate a contract or amendment request for the case you are working on.

Initiate a self-served contract request

As a case owner or fulfiller, initiate a self-served contract for the case you are working on. Self-served contracts are submitted when you want own paper based contract documents to be sent for review.

Before you begin

Before initiating a self-serve contract request, ensure you have created contract types and templates for them. For more information, see Create a contract type and Configure templates for a contract and amendment request in Contract Management Pro.

Ensure that the initiate contract button has been added to your workspace. For more information, see Add a workspace action button for initiating a contract request.

Role required: sn_cm_core.contract_user or sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the case for which you want to initiate a contract.
3. Select **Initiate contract**.
4. In the **Type of paper** drop-down list, select **Own paper**.

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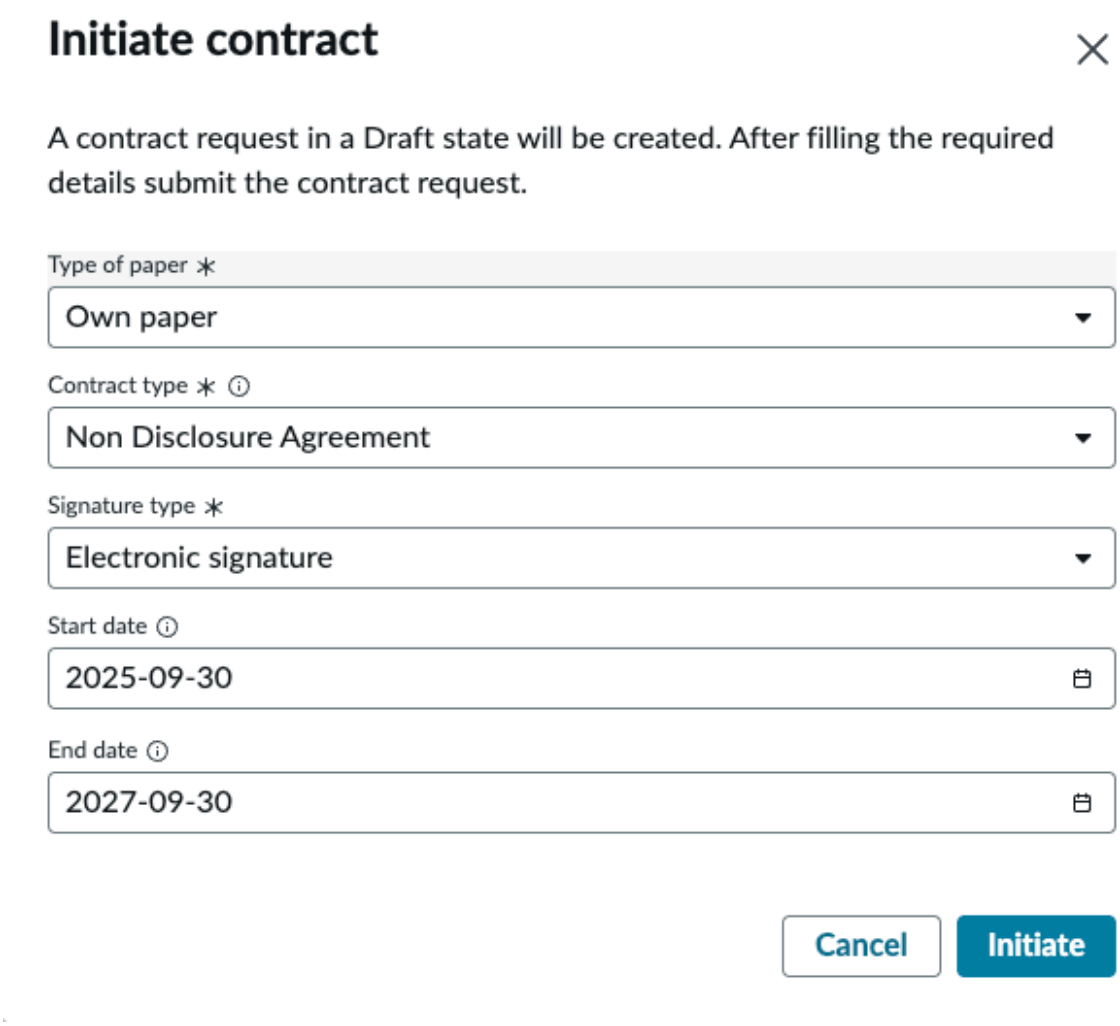
Initiate own-paper contract



5. In the **Contract type** drop-down list, select the type of contract you want to generate.

   Note: Only active contract types are displayed in the list.

6. In the **Signature type** drop-down list, select the signature type for the contract document.
7. In the **Start date** field, specify the contract start date.
8. In the **End date** field, specify the contract end date.
   The End date should be later than the Start date.
9. Select **Initiate**.
   If you do not have an active contract template for the selected contract type, an error is displayed.

Result

A contract request is initiated and opens on a new tab displaying the contract request details.

If there are validation errors, the contract request is created in **Draft** state. If there are no validation errors, the contract request is created in **Work in progress** state.

On the Contract request form, you can assign the contract request, add collaborators, add users to the watch list, change the signature type, and also update the start date and end date.

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What to do next

The next steps depend on whether there were validation errors:

- If there were validation errors, complete the signatory details and resubmit the contract request. For more information, see Resolve the failure to submit a self-serve contract.
- If there were no validation errors, you can proceed to work on the contract request. For more information see, Work on self-served contract requests as a contract user and Work on self-served contract requests as a contract fulfiller.

Initiate a non-self-served contract request

As a case owner or fulfiller, initiate the submission of contracts when you want third-party based contract documents to be sent for review.

About this task

The initiated contract is assigned according to an assignment rule or manually by a contract fulfiller or a group manager. The contract administrator can modify the assignment rule to specify the group to which the contract request should be assigned.

Before you begin

Ensure that the initiate contract button has been added to your workspace. For more information, see Add a workspace action button for initiating a contract request.

Role required: sn_cm_core.contract_user, sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the case for which you want to initiate a contract.
3. Select **Initiate contract**.
4. In the **Type of paper** drop-down list, select **Third-party paper**.

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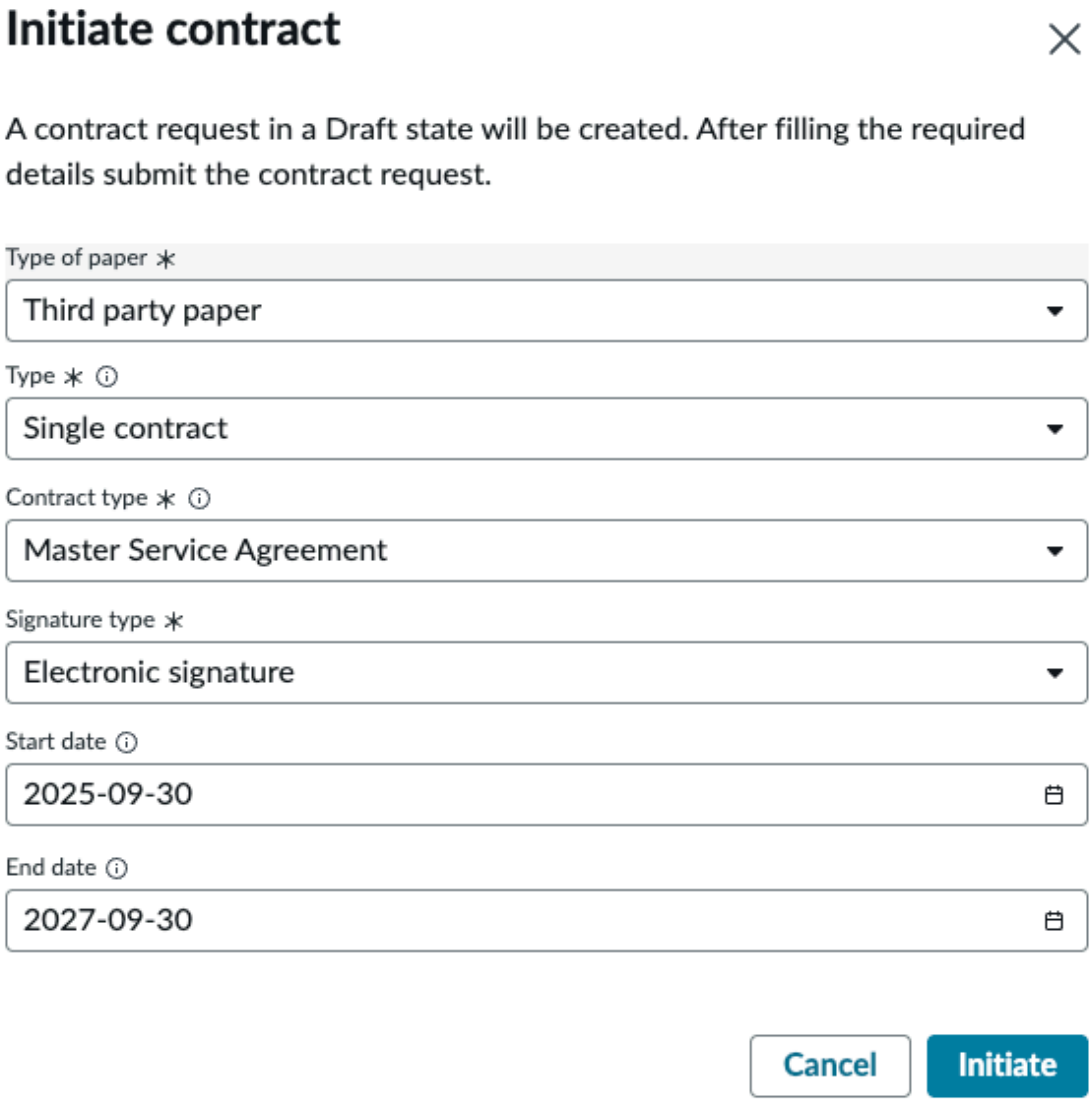

5. In the **Type** field, specify whether the contract request is for single contract or multiple contracts.
   If you select **Single contract**, the **Contract type** field appears.
6. In the **Contract type** field, select the type of contract for which the contract request is created.
7. In the **Signature type** drop-down list, select the signature type for the contract document.
8. In the **Start date** field, specify the contract start date.
9. In the **End date** field, specify the contract end date.
   The End date should be later than the Start date.
10. Select **Initiate**.

Result
A contract request is initiated and opens in a new tab displaying the contract request details.

If there are validation errors, the contract request is created in the Draft state. If there are no validation errors, the contract request is created in the New state.

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What to do next

Add contract documents and submit the contract request. For more information, see Add contract documents to non-self-served contract request.

Initiate an amendment request

Initiate an amendment request from your workspace.

About this task

A sample workflow while submitting on an amendment request would be:

1. Initiate an amendment request from the workspace using the Initiate contract option.
2. Enter amendment details and submit the request.

The initiated amendment is assigned according to an assignment rule or manually by a contract fulfiller or a group manager. The contract administrator can modify the assignment rule to specify the group to which the contract request should be assigned.

Before you begin

- Amendment requests can only be submitted for contracts in the Active state. If a contract is in Draft state and Awaiting Review substate, manually approve it before submitting an amendment request. For more information on how to approve a contract, see Approve contracts to allow amendments.
- Verify that the initiate contract button has been added to your workspace. For more information, see Add a workspace action button for initiating a contract request.
- To copy field values from the parent contract request to the amendment request, configure the `ContractManagementExt` extension point. For more information, see Copy fields from parent request to amendment request.
- Verify you have a contract configuration with the request type set as amendment to copy values from amendment request to the contract repository. For more information, see Create a contract configuration.
- Verify you have a contract template rule to identify the amendment document template to be used for generating the contract document for an amendment request. For more information, see Configure contract template rules.

Role required: sn_cm_core.contract_user, sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the case for which you want to initiate a contract.
3. Select **Initiate contract**.
4. In the **Request type** dropdown, select Amendment.
5. Select type of paper in the **Type of paper** field.
   - For own paper based amendment request, select **Own paper**.
   - For third party paper based amendment request, select **Third Party Paper**. Amendment is supported for third-party contracts with a single contract type.
6. In the **Contract type** field, select the type of contract for which the contract request is created.

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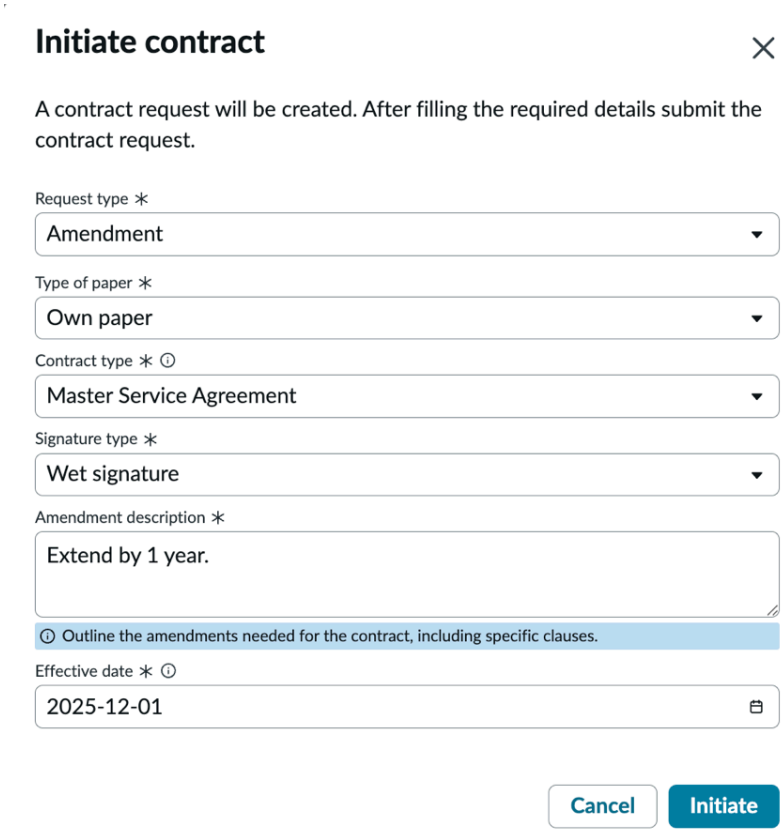

7. In the **Signature type** drop-down list, select the signature type for the contract document. For more information on the signature flow, see Signature workflow for a contract request
8. In the **Amendment description** field, enter the details of the changes required to the existing contract document and any other details.
9. In the **Effective date** field, select a date within the existing contract's start and end dates to indicate when the amendment takes effect.
10. Select **Initiate**.
11. For third-party paper amendment request, attach contract documents and submit the request.
    a. In the Contract Document tab, select **Attach Document**.
    b. Select **Attach file** link.
    c. Select the file to be attached.
    d. Select **Attach**.
    e. Select **Submit**.

    For own paper based amendment request, Version 1.0 of the amendment document is generated and listed in the Contract Document tab and the request moved to New state.

Result
An amendment request is submitted in the New state and a contract request is created for the contract fulfiller to work on it.

View and track contract request details

As a contract user or contract administrator, view the details and track the activities of the contract request.

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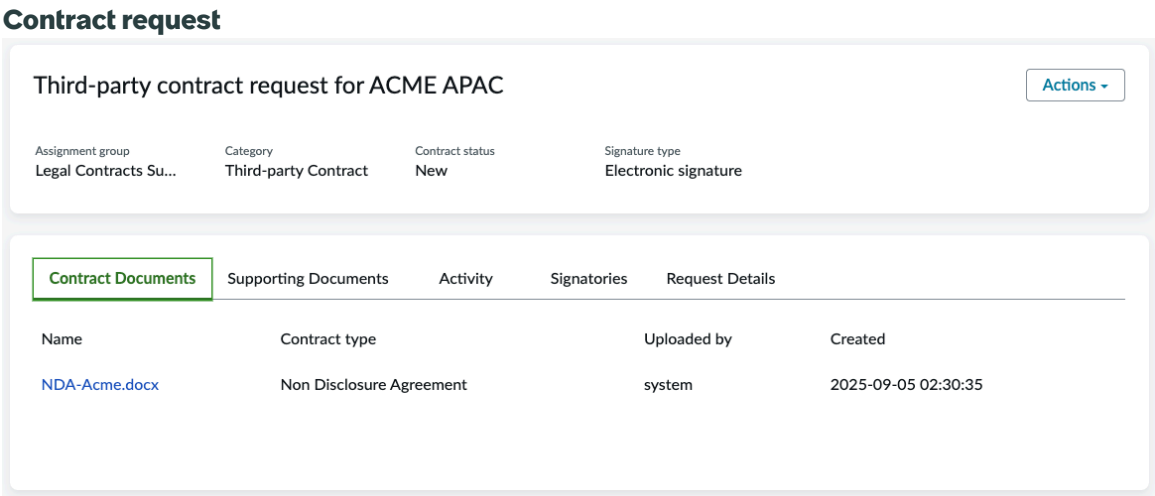
Before you begin
Role required: sn_cm_core.contract_user, sn_cm_core.contract_admin

Procedure

1. Navigate to your workspace.
2. Open the contract request.



3. View the details of the contract request.
   - Review the request details by accessing the **Details** tab.
   - State displays the state of the contract request.
   - Contract status displays the status of the contract document.
   - Review the contract document by accessing the **Contract Documents** tab.
     - If the request uses internal storage for attachments, access the document by selecting it.
     - If the request uses external storage, access the document by selecting the link.
   - View the list of supporting documents by accessing the **Supporting Documents** tab. This related list is available only for non-self-served contract request.
   - View a list of signatories and their details by accessing the **Signatories** tab.
   - View the final contract document by accessing the **Contract Repository** tab. When multiple contract documents are attached in non-self-served contract request, a separate record is created for each contract type.
   - View the access levels to documents for various personas by accessing the **Document Access** tab.
4. Track the request's activities and post messages for the fulfiller working on it by accessing the **Activity** tab.

Assign a contract request

As a contract fulfiller or contract administrator, assign a contract request to yourself or to someone in your assignment group.

Before you begin
Role required: sn_cm_core.contract_fulfiller, sn_cm_core.contract_admin

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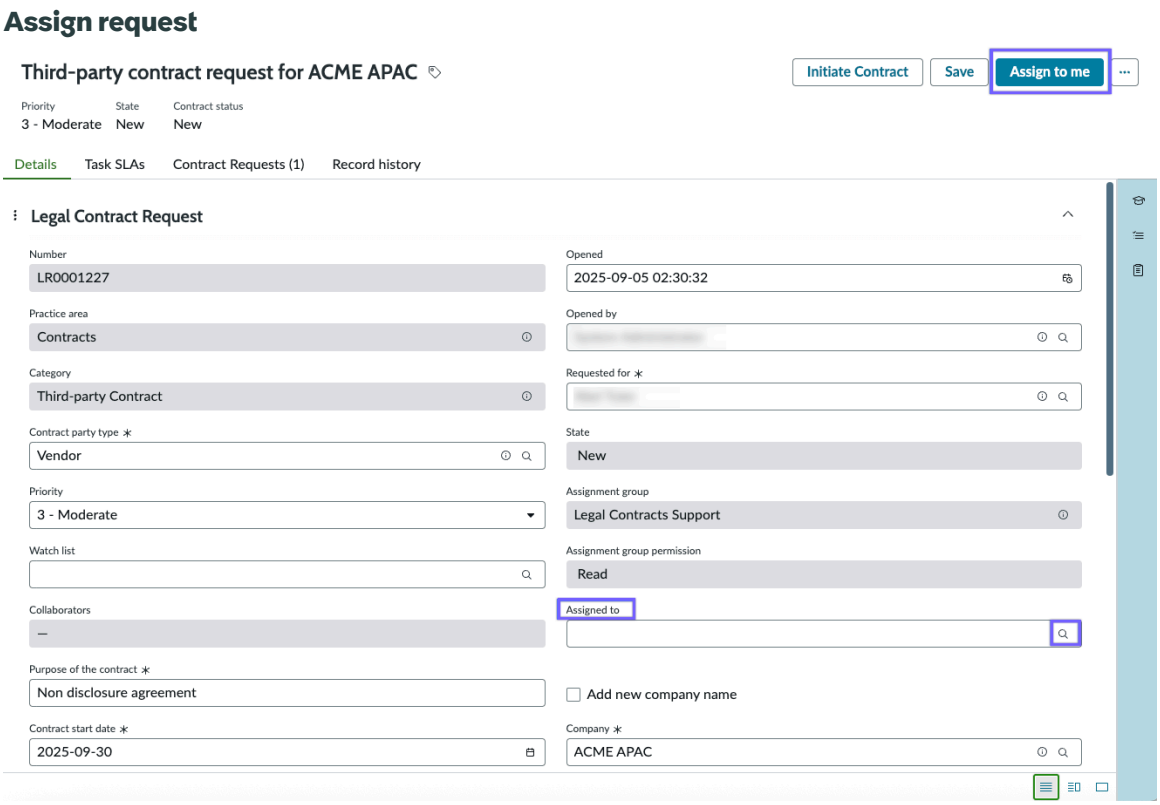
About this task

When a contract user submits a request, it is automatically assigned to a group or user as per the default assignment rule. If the request is assigned to a contract support group, any member from the group can assign the contract request to themselves or assign it to another member of the group.

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. In the list of unassigned requests, open a request by clicking the request number.
4. Assign the request to yourself or to another member from the assigned group.
   - To assign the request to yourself, click **Assign to me**.
   - To assign the request to another member, on the **Details** tab, select a user in the **Assigned to** field and click **Save**.



Use self-served contract request

Use Contract Management Pro to submit contract requests that will generate contract documents using a predefined contract template and template rules.

Features

- Contract templates with metadata, clauses, tables, and create business rules for selecting the most relevant template for a request.
- Contract templates in Microsoft Word format enable easier contract review and editing for the contract fulfiller.
- Electronic signature integrations with Adobe Acrobat Sign and Docusign.

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- Wet signature support for manual signing.
- External storage integrations with Google Drive and Microsoft OneDrive for storing signed contract documents.
- Centralized contracts repository containing the metadata of signed contract documents.
- System property to generate a certification of completion for an electronically signed contract.

Self-served contracts workflow

When a requester submits a self-served contract request, a contract document is created using a standard contract template based on the information from the request. The information from the request is inserted at the appropriate places in the template.

If needed, requesters can request specific changes in the generated contract document. The fulfiller can manage and process these requested changes to make necessary revisions to the contract document from a centralized location. Because contract documents are in Microsoft Word format, reviewing, editing, and finalizing the contract documents is easier than for documents in PDF or HTML format.

If the generated contract document doesn't require any changes, the requester can send it to the signatories for an electronic signature. After all signatories have signed the contract document, it's stored on the ServiceNow instance or an external storage system based on the configuration. The requester and contracts department members can access the signed contract document from the contracts repository.

A workflow for a self-served contract request might progress as follows:

1. The Contract requester initiates a contract request. For more information, see Initiating a contract or amendment request.
   - If there are no validation errors, a contract request is created in the Work in progress state.
   - If there are any signatory validation errors, the contract requester resolves them and resubmits the contract request.
2. A contract document is generated from a contract template and the metadata, clauses, signatories, and tables are added dynamically according to predefined conditions.
3. The contract requester edits the requests for any changes and creates a new version of the contract document by using the **Regenerate** or **Sync document** option.
4. The contract requester views the contract document and does one of the following actions:
   a. If no changes are required, the document is sent for signature.
   b. If any changes are required, the contract requester submits a change request.
5. Based on the change request, the contract fulfiller can take the following actions:
   a. Initiates an internal review process.
      i. The contract fulfiller submits a review task for an internal review.

      Note: The contract fulfiller can create parallel review tasks for the same contract document for different reviewer groups. However, the contract fulfiller can't create a review task for the same document with the same reviewer group if another active task already exists.

      ii. A contract reviewer group manager can assign the review task, or a contract reviewer can self-assign it.
      iii. The assigned contract reviewer starts working on the contract document.

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iv. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.

v. If a request for more information was submitted, the contract fulfiller shares the information.

vi. The contract reviewer reviews the document, accepts or rejects redlines, proposes edits, and adds comments.

vii. The contract reviewer completes the review and shares the updated contract document if available.

viii. The contract fulfiller receives the updated document and makes the necessary changes based on the feedback.

- For internal storage: If any changes are required, a new document version is created after finalizing the document.
- For external storage: Reviewers collaborate on the contract document revision online in real time. After the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.

b. The contract fulfiller initiates an ad-hoc approval from the stakeholders. If the review reveals any required changes, the changes are made and a new document revision is created.

c. After the document is finalized, the fulfiller sends the document to the requester.

6. The contract requester previews the generated contract and, if no changes are required, sends it to the signatories. If changes are required, the review and revision process continues.
7. If external storage is configured, contract documents are stored in it. Otherwise, they are stored in the ServiceNow instance.
8. If any signatory declines the document, it is sent back to the requester to be reworked and the revision is sent for signature.
9. The signed contract is attached to the contract request record.
10. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The requester and department members can access the signed contract document from the Contracts repository.

Note:

The contract requester can cancel a contract request when the state is in Draft, New, Awaiting Approval, Awaiting signature, or Work in progress.

Work on self-served contract requests as a contract fulfiller

Review and finalize a contract document according to the contract request.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller

About this task

A self-served contract request can be worked on by a contract user. However a contract fulfiller can get assigned to the request by an assignment rule or by a group manager. A contract fulfiller can work on the contract request but can also initiate ad-hoc approvals and create revisions manually, whereas a contract user can't initiate ad-hoc approvals or create revisions manually.

You cannot add the same user to the Assigned to and Collaborator fields.

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Procedure

1. Navigate to your workspace.
2. Open the contract request that is assigned to you or if you're a collaborator on the contract request.
3. Work on the contract request.

Action	Steps
Specify the contract as perpetual	Select the **Perpetual** check box in the Details tab to classify the contract as perpetual. **Note:** The **End date** must be blank when this check box is selected. The **Perpetual** check box is available in contract requests that are initiated from the Sales and Order Management and Source-to-Pay Operations.
Regenerate contract document	Create a version of the contract document. Using this option discards the changes made in the previous version of the document. For more information, see Regenerate contract document after modifying request.
Sync the document **Note: This option is available on Contract Management Pro starting with version 1.2.1**	Create a version of the contract document while retaining the changes made in the previous version. For more information, see Create an updated contract document revision after modifying a self-served contract request (starting Contract Management Pro 1.2.1).
Create document revisions	Create a document revision. For more information, see Create a document revision.
Add signatories	Add signatories. For more information, see Add signatories in self-served contract request.
Sync signatories **Note: This option isn't available on Contract Management Pro starting with version 1.2.1 because it is no longer necessary.**	Update the contract document with the latest signatory details. For more information, see Updating and synchronizing signatories.
Initiate ad hoc approvals	Initiate ad hoc approvals. For more information, see Initiate an ad hoc approval for a contract document revision.
Communicate with stakeholders using Email	Communicate with stakeholders via email. For more information, see Send email to stakeholders
Analyze contract documents using Now Assist to identify non-standard and missing clauses	Use Now Assist to analyze the contract documents to identify the non-standard and missing clauses. For more information, see Con

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Action	Steps
	tract analysis using Now Assist in Contract Management.
Send the document for signature	Send the document for a signature. For more information, see Signature workflow for a con tract request.
Cancel request	Cancel a request: ○ On the contract request page, from the Ac tions menu, select **Cancel Request**. ○ Confirm the cancellation by selecting **Can cel Request**.

Work on self-served contract requests as a contract user

As a contract user, edit request, regenerate contract document, and send for signature.

Before you begin

Role required: sn_lg_cnt.contract_user

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Work on the contract request.

Action	Steps
Modify the request details	Modify the fields of the self-served review re quest. If you want to add a company name that is not listed in the **Company** field, select the **Add new company name** check box and then en ter the company name in the **New company legal name** field.
Regenerate contract document	Create a contract document revision from the contract template that includes the latest val ues and discards the changes made in the previous version of the document. For more information, see Regenerate contract docu ment after modifying request.
Sync the document **Note: This option is available on Con tract Management Pro starting with version 1.2.1**	Create a new version of the contract docu ment with updated metadata and signatories while retaining the changes made in the pre vious version. For more information, see Cre ate an updated contract document revision af ter modifying a self-served contract request (starting Contract Management Pro 1.2.1).
Sync signatories	Update the contract document with the latest signatory details. For more information, see Updating and synchronizing signatories

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Action	Steps
Note: This option isn't available on Contract Management Pro starting with version 1.2.1 because it is no longer necessary.	
Send the document for signature.	See Send a contract document for signature.
Cancel request	○ On the contract request page, from the Actions menu, select **Cancel Request**. ○ Select **Cancel Request** to confirm cancellation.

Add signatories in self-served contract request

Add signatories in self-served contract requests when the contract is generated from a template configured with signature blocks.

Before you begin

Role required: sn_cm_core.contract_fulfiller or sn_cm_core.contract_user

Procedure

1. Navigate to your workspace.
2. Open the contract request that is assigned to you or for which you're a collaborator.
3. In the **Signatories** tab, select **Add**.
4. On the Add Signatory form, indicate whether you are configuring an internal or external signatory by selecting **Internal** or **External**.

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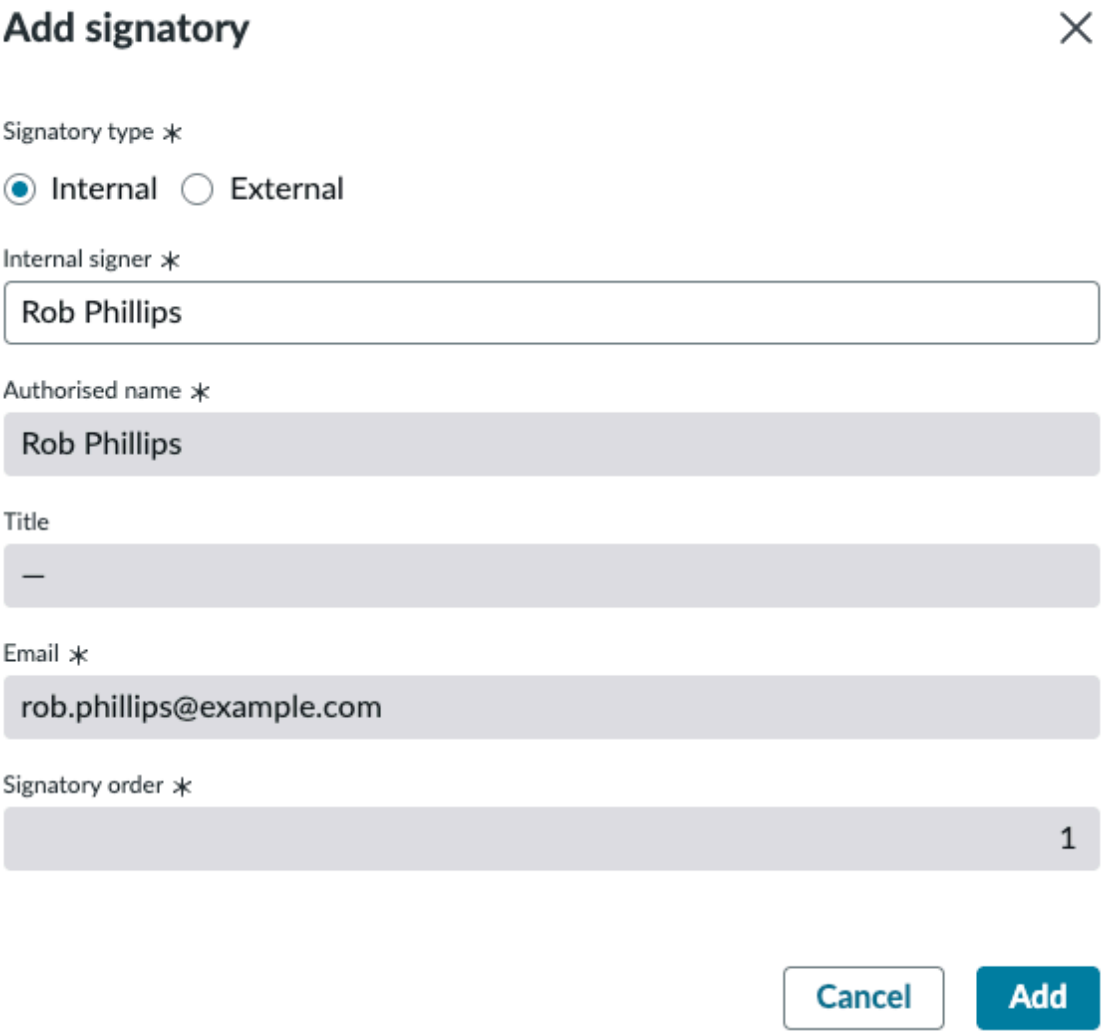
Add signatory



5. Configure the signatories.

Option	Steps
Internal	**a.** In the **Internal Signer** field, enter the name of the signer. The fields **Authorized signatory name**, **Signatory**, and **Signatory email** are automatically populated. **b.** In the **Order** field, enter the order in which the contract should be sent to the signer. The order value should be unique **c.** Select **Add**.
External	**a.** In the **Authorized signatory name** field, enter the external signer's name. **b.** In the **Signatory** field, enter the external signer's title.

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Option	Steps
	c. In the **Signatory email** field, enter the external signer's email address. **d.** In the **Order** field, enter the order in which the contract should be sent to signers for an e-signature. The order value should be unique. **e.** Select **Add**.

Create an updated contract document revision after modifying a self-served contract request (starting Contract Management Pro 1.2.1)

When a contract request is modified, sync the contract document for self-served requests to create a new revision of the document with updated metadata and signatories while retaining the changes made in the previous version of the contact document.

About this task

Note: The **Sync document** option is available starting with Contract Management Pro version 1.2.1.

You can sync a contract document only when the contract request is in the Work in progress state.

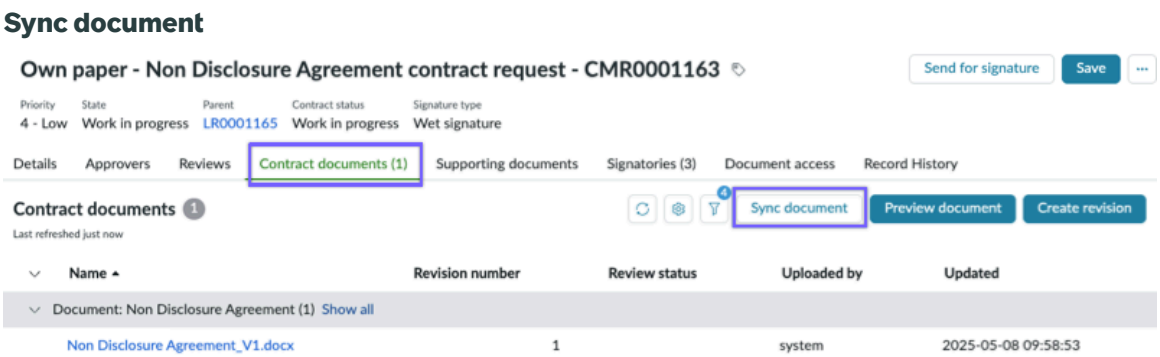
Note: Tables aren't updated when you use the **Sync document** option. You must regenerate the document to update the tables. For more information, see Regenerate contract document after modifying request.

Before you begin

Role required: sn_cm_core.contract_fulfiller or sn_cm_core.contract_user

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Select the **Contracts documents** tab.
4. Select **Sync document**.



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Result

A new contract document revision is created with the updated metadata and signatories. The changes made in the previous revision are retained.

Regenerate contract document after modifying request

As a contract user or contract fulfiller, regenerate the contract document for self-served requests when the parent request has been modified.

About this task

When the parent request is modified, you can use the **Regenerate** option to generate a new contract document from the contract template with the latest metadata, signatories, and tables. You can regenerate a contract document only when the State is Draft or Work in progress.

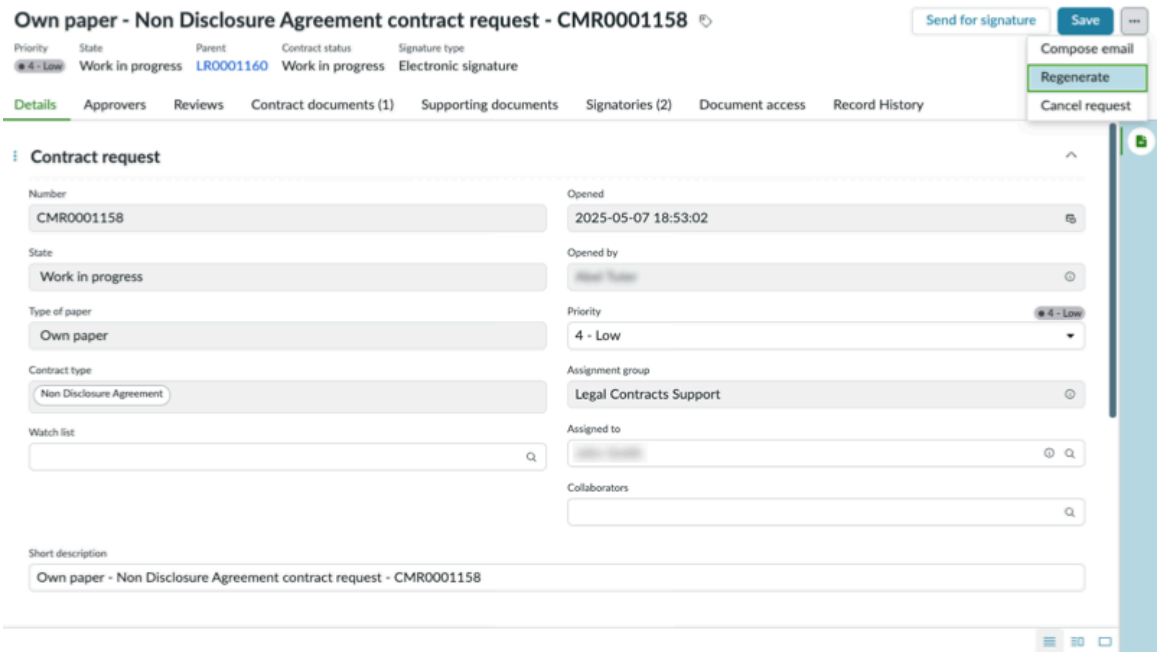
Any changes made to the signatory information in the contract request will be overwritten by the signatory information from the contract template. If the signatory information is incomplete or inconsistent after regeneration, you can manually update the signatories. For more information, see Updating and synchronizing signatories.

Before you begin

Role required: sn_cm_core.contract_fulfiller or sn_cm_core.contract_user

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Select the More Actions icon ( ) and select **Regenerate**.



Result

The results of the regeneration depends on the initial state of the document:

- Draft: Replaces the existing contract document revision.
- Work in progress: Creates a new contract document revision. Any changes made in the previous revision are discarded.

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Note that although contract fulfillers can see all contract document revisions, a contract user can see only the latest revision.

Updating and synchronizing signatories

As a contract user or fulfiller, update and sync signatory details when the contract submission has failed, or contract document cannot be sent due to incomplete signatory information.

Resolve the failure to send contract documents for signature (starting with Contract Management Pro 1.2.1)

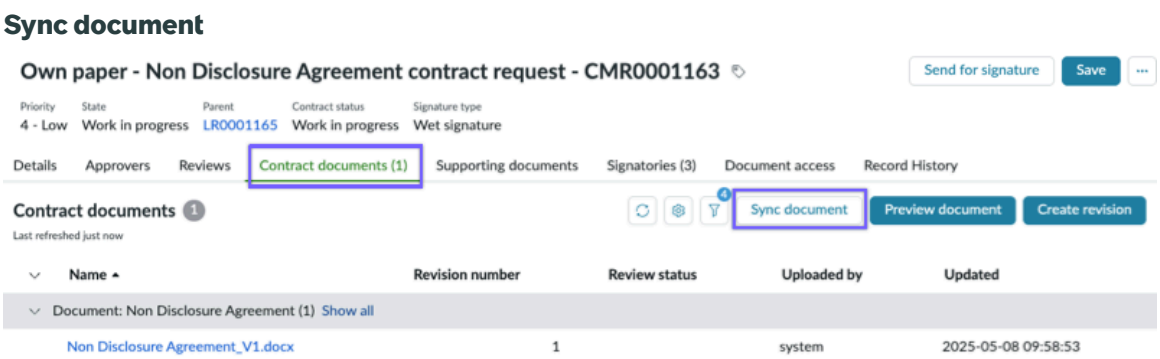
Update signatory details in an external contract document in Contract Management Pro when there is a failure in sending the document for signature due to a mismatch between the signatory information in the contract request and the contract document.

Before you begin

Role required: sn_cm_core.contract_user, sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Select the **Signatories** tab.
4. Select the signatory.
5. Update the signatory information.
6. Select **Save**.
7. Select the **Contracts documents** tab.
8. Select **Sync document**.



A new contract document revision is created with the updated signatory information.

9. Select **Save** to save the contract request.
10. Select **Send for signature**.
    A message appears displaying details of the contract document that is sent for signature.
11. Select **Send for signature** on the confirmation message.

Resolve the failure to submit a self-serve contract

As a contract user, resubmit a contract request that was not submitted due to incomplete signatory information by updating and syncing signatory information.

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Before you begin
Role required: sn_cm_core.contract_user

Procedure
1. Navigate to your workspace.
2. Open the contract request.
3. Review the information in the **Activity** stream to find the validation error.
4. Select the **Signatories** tab.
5. Select the signatory and update the information.
6. Select **Save** to save the signatory details.
7. Select the **Signatories** tab.
8. Select **Sync signatories**.
   The contract document is updated with the new signatory details.
9. Select **Save**.
10. Select **Resubmit**.

Result
The contract request is resubmitted and the state changes from Draft to Work in progress.

Resolve an error during send for signature

As a contract user or fulfiller, update and synchronize signatory details when send for signature fails due to a mismatch between signatory information in the contract request and contract document.

Before you begin
Role required: sn_cm_core.contract_user, sn_cm_core.contract_fulfiller

Procedure
1. Navigate to your workspace.
2. Open the contract request.
3. Navigate to the **Activity** stream to find the validation error.
4. Select the **Signatories** tab.
5. Select the signatory and update the information.
6. Select **Save** to save the signatory details.
7. Select the **Signatories** tab.
8. Select **Sync signatories**.
   The contract document is updated with the new signatory details.
9. Select **Save**.
10. Select **Send for signature.**
    A message appears displaying details of the contract document that is sent for signature.
11. Select **Send for signature** on the confirmation message.

Result
A new contract document revision is created with the latest signatory details and sent for signature. The Activity stream displays details of the contract document that is sent for signature.

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Reviewing and finalizing a self-serve contract document

Review and finalize the contract document generated after the self-serve contract request is submitted, then send it for signature.

After submitting a self-serve contract request, a contract document is generated based on the contract template and contract template rules. A workflow for reviewing and finalizing a self-serve contract document might progress as follows:

1. The contract user reviews the contract document.
   - If no changes are required, the contract user submits the document for signature.
   - If changes are necessary, the contract user submits a change request to the contract fulfiller and the process continues.
2. An email notification with the details of the change request is sent to the contract fulfiller.
3. The contract fulfiller updates the document and creates a document revision.
4. Contract fulfiller gets ad-hoc approval from the stakeholders.
5. Contract fulfiller sends the contract document back to the contract user.
6. An email notification is sent to the contract user that the document has been updated.
7. The contract document can shared with stakeholders and on finalizing can be sent for signature.
8. If additional changes are required, the contract user submits the change request again and this process continues until the document is acceptable and can be sent for signature.

Review a contract document in your workspace

As a contract user, review a contract document and submit a change request to the contract fulfiller if changes are required in the contract document.

Before you begin

Role required: sn_cm_core.contract_user

About this task

- Change requests can be submitted only by users who have initiated the contract request or for whom it was initiated.
- The Contract state in the request is Work in progress.
- The **Request changes** option isn't available if a previously submitted change request isn't completed.

Procedure

1. Open the contract request from the workspace that you're using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon (). **c.** Select **Contract requests** > **All** **d.** Select a contract request.

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Method	Steps
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. Select the **Contract documents** tab.
3. Access the contract document.

Location	Action
From internal storage	**a.** Select **Preview document**. **b.** In the drop-down list, select the contract type. **c.** Select **Preview** to view the document.
From external storage	Select the link in the **URL** column. The document opens from the external stor age.

4. Review the contract document.

Review result	Action
No change is required	Send the document for signature. For more information, see Send a contract document for signature.
Changes are required	Submit a change request. **a.** From the Actions drop-down list, select **Re quest Changes**. **b.** Attach a file in the **Attachment document** field. **c.** Describe the desired changes in the **Com ments** box. **d.** Select **Submit**. The change request is submitted for the contract document. The change request de tails and the attached document are added to the activity stream. ○ When a contract request has been as signed to a contract fulfiller, its status up dates to Changes requested and the Con tract state remains in Work in progress.

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Review result	Action
	○ If a contract request isn't assigned to any one, its state changes to New and it is listed as unassigned in the contract workspace for a contract fulfiller to work on.

Work on a contract change request

As a contract fulfiller, review the change request, update the contract document, and send it back to the contract user.

Before you begin

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Select the contract request for which the change request has been submitted.
   The details of the change request are included in the **Activity** stream and the notification email.
3. If the contract request is not already assigned to you, select **Assign to me**.
4. Select **Start work** to work on the change request.
5. Select the Contract documents tab.
6. Access and edit the contract document.

Choice	Steps
Download contract document from the internal storage	**a.** Select **Preview document**. **b.** In the drop-down list, select the contract type. **c.** Select **Preview**. **d.** Select the Download icon ( ). **e.** Edit the downloaded document.
Download contract document from the external storage	**a.** Select the URL. The document opens from the external storage. **b.** Download the contract document **c.** Edit the downloaded document.
Edit the contract document directly from the external storage	**a.** Select the URL. The document opens from the external storage. **b.** Edit the document directly from the external storage. The document is automatically saved in the external storage.

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7. If you have downloaded the document from the storage, upload the updated contract document by creating a revision.

   a. Select **Create revision**.

   b. In the Create revision from drop-down list, select a storage type and upload the new document.

      - **In the workspace**: Select **Attach File** and upload the document.
      - **Activity stream**: In the **Document** field, select the document that is displayed based on attachments in the activity stream.

        The documents attached while requesting changes for a contract and the documents received through inbound emails are available in the Activity stream.

      - **External Storage**- In the Document field, select the document. This option is displayed only if external storage is configured

8. **Optional:** Get approval of the updated document from stakeholders.
   For more information, see Initiate an ad hoc approval for a contract document revision.
9. Return the contract document to the requester.

   a. Select **Send document**.

   b. Select **Send document** on the confirmation screen.

Result

The document is sent back to the user and the Contract status updates to Document ready to indicate that the contract document has addressed the change request.

Send a contract document for signature

After a contract document has been reviewed and finalized, send the document for signature.

Before you begin

The contract document must have been reviewed and finalized, and the contract status must be set to Document ready. For more information, see Review a contract document in your workspace and Work on a contract change request.

If the contract request is linked to a parent contract request, the parent request must be in Contract signed or Closed complete state.

Role required: sn_cm_core.contract_user

Procedure

1. Navigate to your workspace.
2. Select a contract request.
3. Select **Send for signature**.

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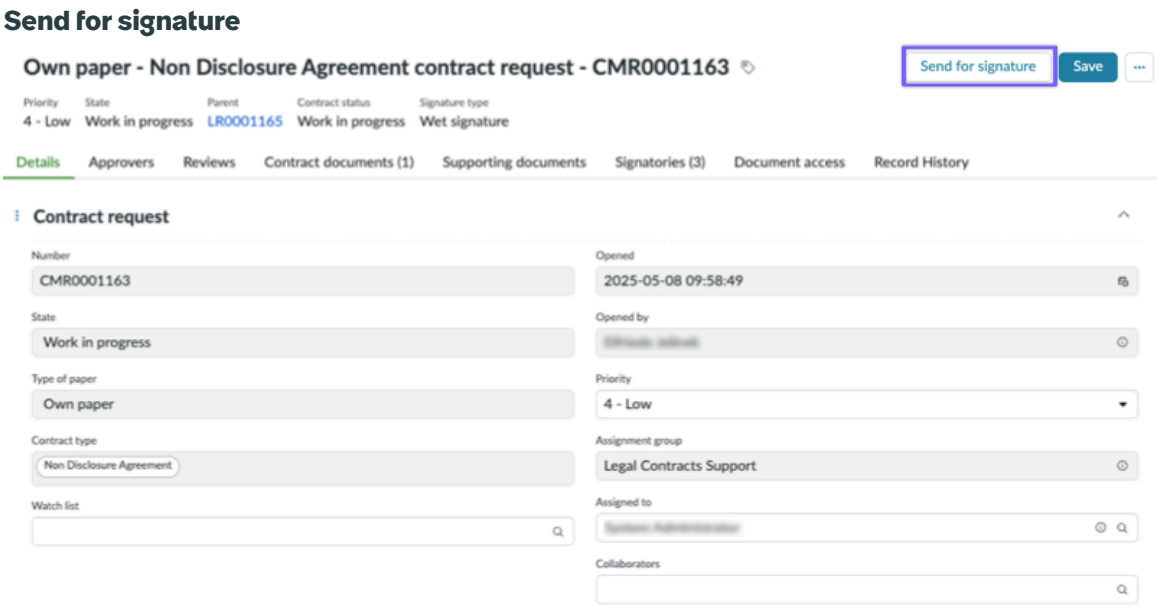

- If a message appears containing the details of the contract document, select **Send for signature**.
- If a message appears stating that the signatories aren't synchronized:

  a. Update and sync the signatures.

  - For versions of Contract Management Pro starting with 1.2.1, see Resolve the failure to send contract documents for signature (starting with Contract Management Pro 1.2.1).
  - For earlier versions of Contract Management Pro, see Resolve an error during send for signature.

  b. Select **Send for signature**.

  c. Select **Send for signature** in the confirmation message.
- If a message appears stating that the parent contract request is not signed, ensure the parent contract is either signed or unlinked before selecting **Send for Signature**.

  For more information, see Remove a linked contract.

Result

The document is sent for signature to the specified signatories. The activity stream displays details of the contract document that is sent for signature.
The contract request state and contract status updates to Awaiting Signature. For more information, see Signature workflow for a contract request.

Use non-self-served contract request

Use Contract Management Pro to submit non self-served contract requests for review of contracts based on third-party templates.

Features

Non-self-served contract requests include the following features:

- Ability to submit a third-party document for review.
- Ability to upload multiple contract and supporting documents for review.
- Get review and feedback from the internal subject matter experts on contract documents.

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- Electronic signature integrations with Adobe Acrobat Sign and Docusign.
- Support for storing contract documents in your ServiceNow instance or external storage systems such as Microsoft OneDrive and Google Drive.
- Contracts repository containing the metadata of signed contract documents.
- Support for a configurable system property to generate a certification of completion.

Non-self-served contracts request workflow

A workflow for non-self-served contract request might progress as follows:

1. The Contract requester initiates a contract request from the workspace. For more information, see Initiating a contract or amendment request.
2. A contract request is created in the Draft state.
3. The Contract requester uploads a single contract or multiple contracts and their supporting documents and classifies them.
4. The contract fulfiller views the contract document attached to the contract request.
5. If necessary, the contract fulfiller reclassifies the contract and supporting documents.
6. If an expert review or feedback is required from internal teams, the contract fulfiller initiates an internal review process.
   a. The contract fulfiller submits a review task for internal review.

      Note: You can create parallel review tasks for the same contract document for different reviewer groups. However, you cannot create a review task for the same document with the same reviewer group if another active task exists.

   b. The contract reviewer is assigned the review task
   c. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.
   d. If a request for more information was submitted, the contract fulfiller shares the information.
   e. The contract reviewer reviews the document, accept, reject, or proposes edits, and adds comments.
   f. The contract reviewer reviews the contract and provides feedback. If a revised document is available, it is also shared with the contract fulfiller.
   g. The contract fulfiller receives an updated document and makes the necessary changes based on the feedback.
      - For internal storage - If any changes are required, a new document version is created after finalizing the document.
      - For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can finalize the contract document that is available online or create a new offline version with the changes.
7. The contract fulfiller uploads the revised contract to the contract request.
8. The contract fulfiller emails the revised contract document to third-party contacts.
9. The contract fulfiller views the responses from the third-party contacts in the activity stream of the contract request.

   Multiple iterations of revisions between your company and the third party might be necessary before the contract document is finalized by all parties. The review process may be conducted again with different reviewer groups.

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10. The contract fulfiller initiates an ad-hoc approval from the stakeholders. If the review reveals any required changes, the changes are made and a new document revision is created. The contract document can be sent for signature only when it has been approved.
11. If there are multiple contract documents, the contract fulfiller prepares for signatures by specifying the order. If there's an e-signature, the contract fulfiller adds the required fields and sends the contract document for signature.
12. Signatories review the contract document.
    - If no change is required, the contract document is signed by all the signatories.
    - If any changes are required, the signature is declined, and the user who is working on the contract request generates a new document and resends it for signature.
13. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The requester and department members can access the signed contract document from the contracts repository.

Modify a non-self-served contract request

As a requester, modify the contract request to update the request details or replace the attached contract document with an updated version.

Before you begin

You can modify a request until it is in the New state.

Role required: sn_cm_core.contract_user

Procedure

1. Navigate to the contract workspace and select the contract request.
2. Modify the request.

Action	Steps
Modify the request details	Modify the fields of the non-self-served review request.
Add and classify documents	For more information, see Add contract documents to non-self-served contract request and Reclassify contract documents in third-party contract request
Delete documents	In the Documents section, select the Delete icon (🗑) next to the document you want to delete.

3. Select **Save** to update the record.

Work on a non-self-served contract review request

Review and revise a non-self-served contract document. As a collaborator on the request, you can email the revised document to stakeholders to verify the revisions, and then send the ready document for an e-signature from within the contract request.

Before you begin

Role required: sn_cm_core.contract_fulfiller

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About this task

As a collaborator added to a request, you can access and work on the request just as assignees can. However, you can't modify the **Assigned to** and **Assignment group** fields.

Procedure

1. Navigate to your workspace.
2. On the **Lists** tab, navigate to **Contract Requests** and open a contract.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state and the Contract status of the contract request is Work in progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

3. **Optional:** If you need help from other fulfillers to work on the contract request, add them in the **Collaborators** field.

   Note:
   - Users with the sn_cm_core.contract_fulfiller role are listed in the **Collaborators** field.
   - Same user cannot be added to the Assigned to and Collaborator fields.

   The collaborators are notified via email that they have been added as collaborators to a contract request.
4. **Optional:** Specify the contract as perpetual by selecting the **Perpetual** check box in the Details tab.

   Note: The **End date** must be blank when this check box is selected.

   The **Perpetual** check box is available in contract requests that are initiated from the Sales and Order Management and Source-to-Pay Operations.
5. **Optional:** Reclassify the contract or supporting documents submitted for review.

   (Optional) Examples of reclassifying the contract or supporting documents are:

   - You can change the contract document type from a Non-disclosure Agreement to a Partnership Agreement. For more information, see Reclassify contract documents in third-party contract request.
   - You can change the supporting document to a contract document. For more information, see Reclassify supporting documents in the contract request.
6. Open an existing revision of a contract document.

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- For internal storage: Open the document revision record by navigating to the **Contract documents** tab and then selecting the name of the document.
- For external storage: View the document online by navigating to the **Contract documents** tab and then selecting the link on the **URL** tab.

7. Review the contract documents.
8. Create document revisions.
   For more information, see Create a document revision.
9. Analyze the contract documents to identify non-standard and missing clauses by using Now Assist in Contract Management.
   For more information, see Contract analysis using Now Assist in Contract Management.
10. If an approval is required from other stakeholders, send the document for ad-hoc approval.
    For more information, see Initiate an ad hoc approval for a contract document revision.
11. Set up an email to stakeholders to have the completed contract document reviewed and the changes confirmed.
    For more information, see Send email to stakeholders.
12. Add the internal or external signatories needed for e-signatures on the contract by navigating to the **Signatories** tab and then selecting **Add**.

Option	Steps
Internal	**a.** In the **Internal Signer** field, enter the name of the signer. The **Authorized signatory name**, **Signatory**, and **Signatory email** fields are automatically populated. **b.** In the **Order** field, enter the order in which the contract should be sent to the signer. The order value should be unique. For example: Enter the order numbers as 10, 20, 30, and so on, increasing by 10 each time. The system starts sending the contract to the internal signer with the lowest number.
External	**a.** In the **Authorized signatory name** field, enter the external signer's name. **b.** In the **Signatory** field, enter the external signer's title. **c.** In the **Signatory email** field, enter the external signer's email address. **d.** In the **Order** field, enter the order in which the contract should be sent to signers for an e-signature. The order value should be unique. For example: Enter the order numbers as 10, 20, 30, and so on, increasing by 10 each time. The system starts sending the contract to the external signer with the lowest number.

13. When all stakeholders have agreed on a contract document revision, select **Prepare for Signature** to prepare and send the document to the signatories for e-signatures.

Note: The option to reorder is seen only when multiple documents are attached.

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a. In the Reorder the document pop-up window, drag and place the documents to define the order.

b. Select **Prepare for Signature**.

> **Note:** When you select **Prepare for Signature**, the document opens on the configured e-signature portal.

The document status updates to Preparing for Signature. The contract documents submitted in the non-self-served contract request are combined into a single document and sent for Prepare Signature.

14. Complete the document in the configured e-signature system and send it for signature.
    a. Preview the document to ensure that the content is correct.
    b. Add the required fields, including the **Signature** field.
    c. Select **Send**.
    An e-signature envelope is created and sent to all signatories. If the system receives a success notification from the electronic signature provider, the State and Contract status updates to Awaiting Signature.
15. **Optional:** If you need to cancel the signature request before all signers have completed signing the document, select **Cancel signature**.
    The contract request State updates to Work in Progress and the Contract document Status updates to Signature canceled.

What to do next

- Signatories can sign or decline to sign the contract.

  For more information, see Signature workflow for a contract request.

- Check the contract request state and the contract document status in the request:
  - If all signatories sign the contract document, the contract document status updates to Contract signed. On the **Signatories** tab, the status of all signatories updates to Signed. You can access the contract repository record from the **Contracts Repository** tab.
  - If any signatory declines to sign the contract document, the Contract Status updates to Signing Declined. If more changes are required in the contract document, update it and resend it to the signatories for their signatures.
  - After all the signatories have signed the document, an email is sent to the signatories with the finalized contract document attached.
- If the contract is signed by all signatories, you can close the request by selecting **Close Complete**.

Add contract documents to non-self-served contract request

As a contract user or the person for whom the contract was requested, add single or multiple contracts and classify them.

Before you begin

Role required: sn_cm_core.contract_user

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About this task

- The non self served contract request supports the upload of contract and supporting documents. Only the contract documents are sent for signature.
- You can attach multiple documents, one document at a time.
- You can attach contract documents when the contract request is in Draft state.

Procedure

1. Navigate to your workspace.
2. Select a contract request.
3. In the Contract Document tab, select **Attach Document**.
4. In the Select contract type drop-down, select the type of contract.
5. Select **Attach file** link.
6. Select the file to be attached.
7. Select **Attach**.
   The selected file is attached and listed in the Contract Documents related list.

Reclassify contract documents in third-party contract request

As a contract fulfiller, reclassify the documents submitted in a third-party contract review request. For example, you need to change the contract document type from Non-disclosure Agreement to Partnership Agreement.

Before you begin

Ensure that the contract request type is Multiple contracts.

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Navigate to the contract workspace and select the contract request.
2. In the **Contract Documents** related list, select **Reclassify**.
3. In the **Existing contract type** drop-down list, select the contract type that you want to reclassify.

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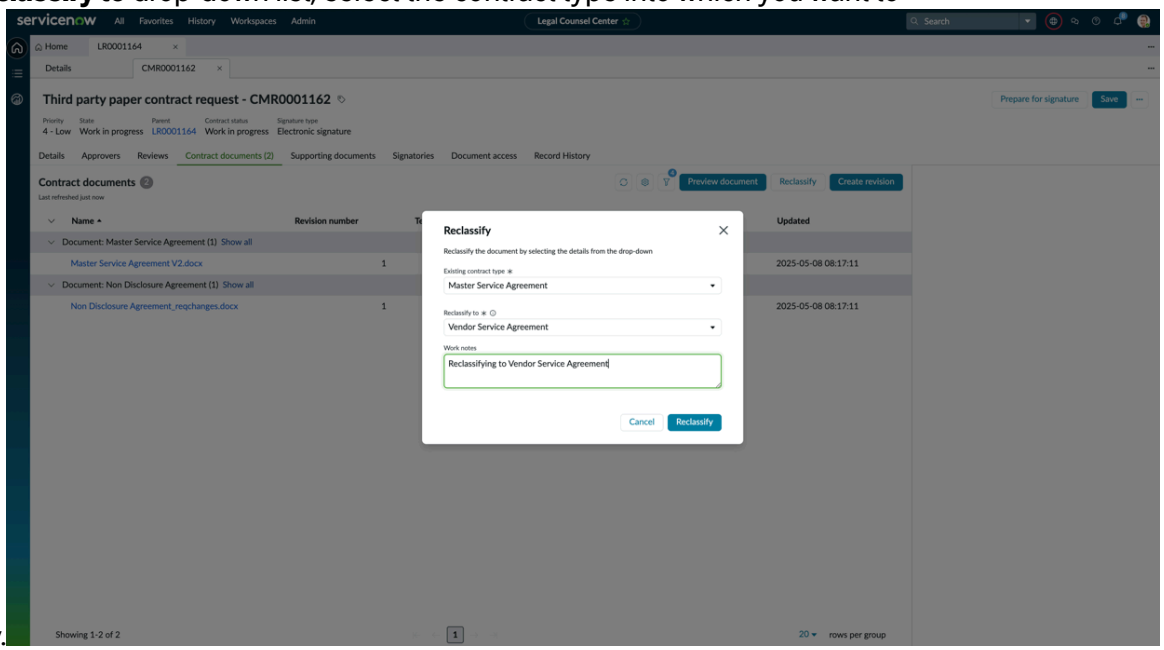
4. In the **Reclassify to** drop-down list, select the contract type into which you want to reclassify.



   Only active contract types are displayed in the list.
5. **Optional:** Add more information about the document in the **Work notes** field.
6. Select **Reclassify** to update the classification.
7. Select **Save** to save the record.

Modify supporting documents in the contract request

As a contract fulfiller, add, classify, or remove supporting documents submitted in the contract request.

Before you begin

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace and select the contract request for which you want to modify the documents.
2. Navigate to **Supporting Documents** tab.
3. Modify the supporting documents.

Action	Steps
Add supporting documents	Add supporting documents to the contract request
Reclassify supporting documents	Reclassify supporting documents in the contract request
Remove the supporting document	**a.** Select the document you want to delete. **b.** Select **Remove**. **c.** On the Confirmation screen, select **Remove**.

4. Select **Save** to save the record.

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Add supporting documents to the contract request

As a contract user or fulfiller, add single or multiple supporting documents to the contract request and classify them.

Before you begin

Role required: sn_cm_core.contract_user, sn_cm_core.contract_fulfiller

About this task

- The contract requests supports the upload of single contracts or multiple contracts and supporting documents. Only the contract documents are sent for signature.
- You can attach multiple documents one at a time.
- You cannot attach multiple supporting documents with the same name.
- A contract user can attach supporting document when the state is Draft.
- A contract fulfiller can attach supporting document when the state is Work in progress,

You can attach supporting documents only when the State is Draft or Work in progress.

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. In the Supporting Document tab, select **Attach Document**.
4. In the Upload from drop-down, select a storage type and upload a new document.
   - **Computer**: Select **Attach File** and upload a document.
   - **Inbound Email**: In the Document field, select the document that is displayed based on an attachment in the activity stream.
5. **Optional:** Add more information about the document in the **Work notes** field.
6. Select **Upload**.
   The selected file is attached and listed in the Supporting Documents related list.

Reclassify supporting documents in the contract request

As a contract fulfiller, reclassify the supporting documents submitted in the contract request. For example you can reclassify the supporting document as a contract document.

Before you begin

Ensure that the contract request type is Multiple contracts.

Role required: sn_cm_core.contract_fulfiller

About this task

You can reclassify supporting documents only when the State is Work in progress.

Procedure

1. Navigate to your workspace and open the contract request for which you want to reclassify the documents.
2. In the **Supporting Documents** tab, select **Reclassify**.
3. In the **Select document** drop-down, select the document that you want to reclassify.
4. In the **Reclassify to** drop-down list, select the new contract type.
   Only active contract types are displayed in the list.

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5. **Optional:** Add more information about the document in the **Work notes** field.
6. Select **Reclassify** to update the classification.
7. Select **Save** to save the record.

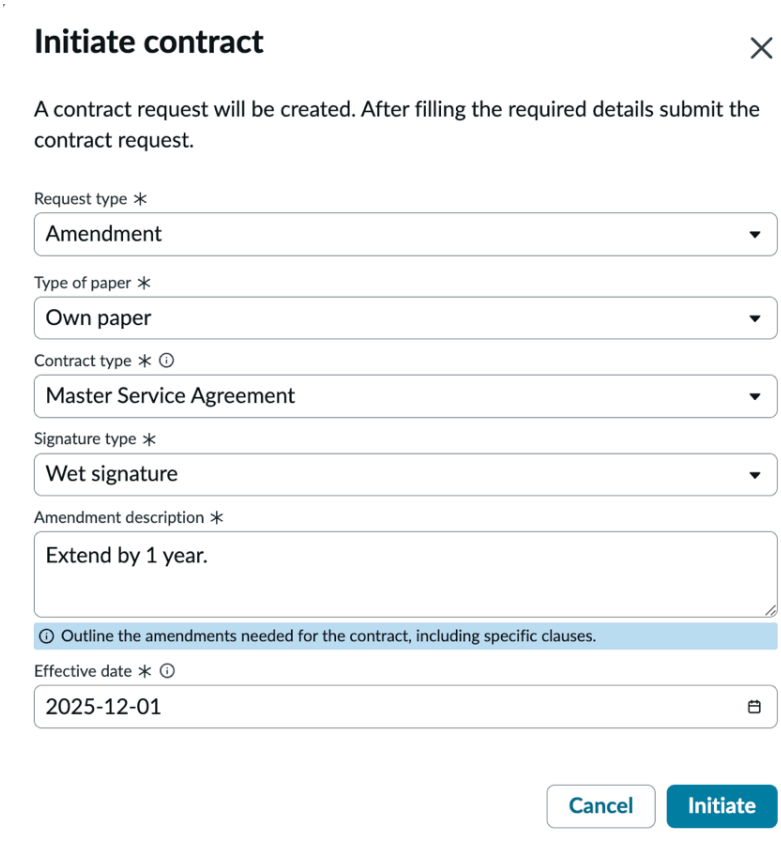
Contract amendments

The contract amendment workflow enables you to initiate, manage, and track changes to existing contracts through amendment requests.

Amendments can be made by adding, removing, or updating terms, without the need to replace the entire contract.

You can initiate an amendment request from your workspace using the **Initiate contract** modal.

To initiate an amendment request from your workspace, verify you have configured the initiate contract button. For more information, see Add a workspace action button for initiating a contract request.



Distinguish contract and amendment request

The field, **Request type**, differentiates between contract and amendment requests. For amendment request, the value is **Amendment** and for contract request it's **New contract**.

The Request type field is displayed in the contract details secondary header, and list pages making it easy to differentiate between the two request types.

This field is also present in the configurations: Contract template rule and contract configuration records to indicate if the configuration applies to a contract or an amendment request.

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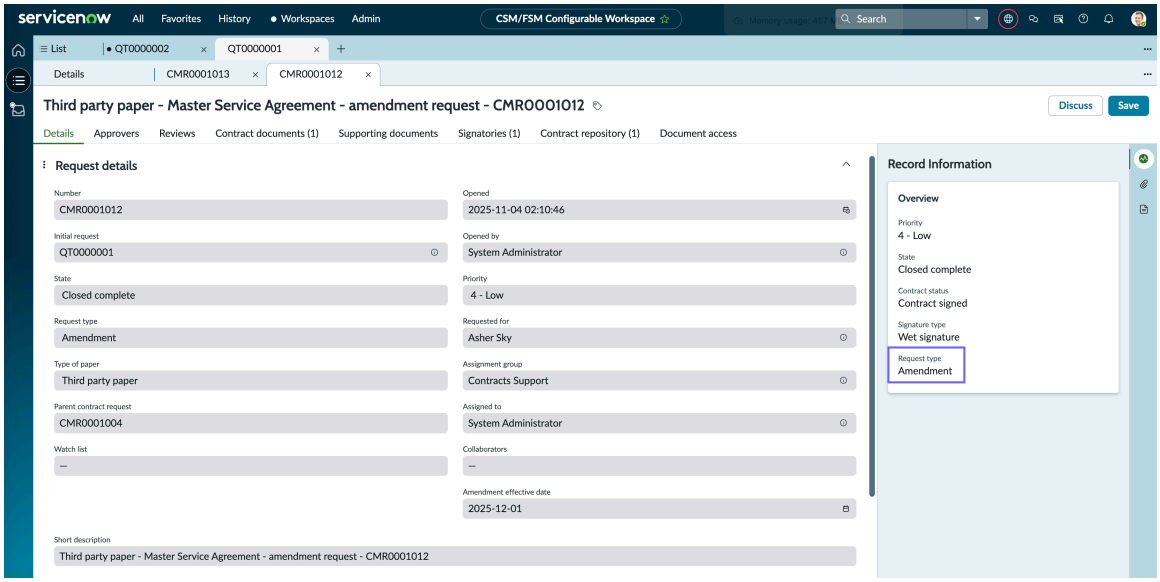


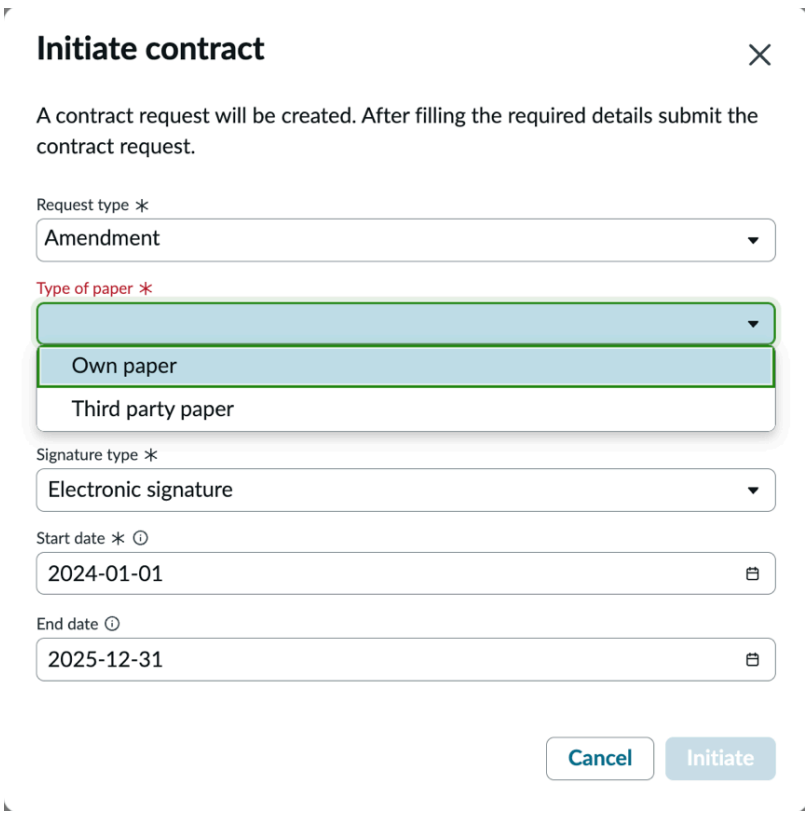
If you have customized the workflow to support amendments; the Request Type field may not display the correct value to differentiate between new contracts and amendments. To resolve Request type field value, update the script *`Populate Request Typescript in CMR`* and run it to set the request type correctly.

Types of paper for an amendment

The amendment workflow supports both own-paper and third-party amendment requests.

Note: Third-party amendments are supported only for single contract types.

While submitting an amendment request, you can select the **Type of paper** from initiate contract modal.



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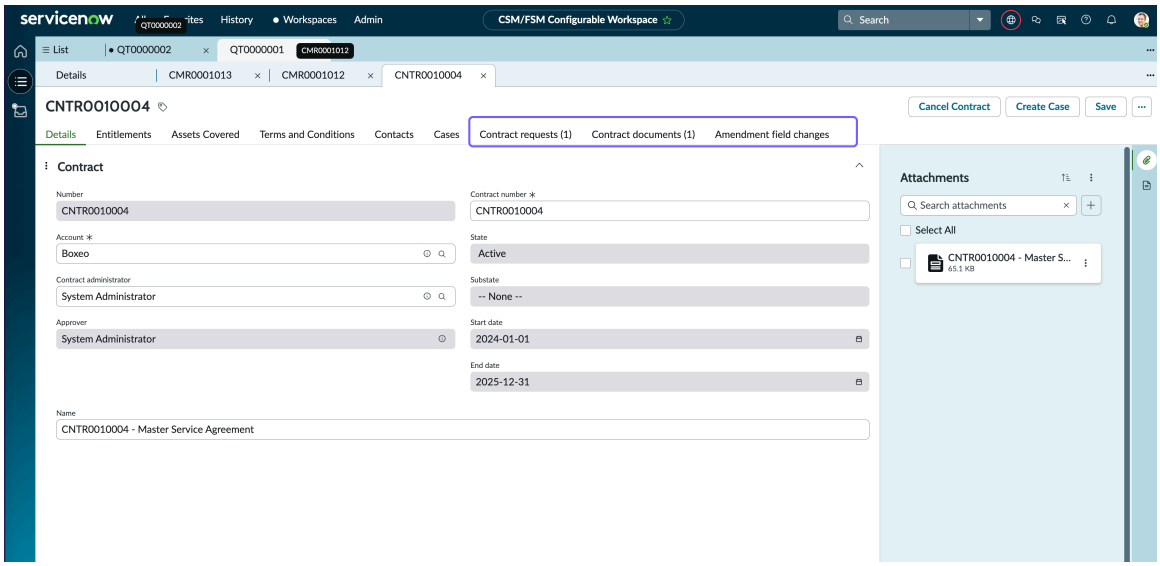
View contract amendment details

The following tabs are available within the contract repository record to provide amendment details:

- Contract Documents: Provides access to all signed documents related to the contract, including those generated or updated as part of amendment processes.
- Contract Requests: Displays all contract and amendment requests associated with the contract.
- Amendment Field Changes: Shows a detailed log of all field changes made through amendments, enabling easy tracking of modifications over time.



Contract amendment workflow

The contract amendment workflow might progress as follows:

1. The contract requester does the following:
   a. Initiates an amendment request from the workspace.
   b. Enters amendment details and submits the request.
   c. Initiates an amendment request.

      Note: Amendment request is created in Draft state.

   d. For third-party paper amendment request, attaches contract document. For own-paper, the document is generated from a contract template.
   e. Link a parent contract.
   f. Submits amendment request.
2. The contract fulfiller does the following:
   a. Link a parent contract if already not linked or wants to change the linked parent contract.
   b. Assign the amendment contract request.
   c. Start working on the amendment request.
   d. Review the details of the amendment requested.
   e. Update the contract details and contract document according to the amendment request.

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f. Upload revised contract document using **Create revision** option.

g. Finalizes the contract amendment using the review, approval, and signature workflow.

3. After all signatories have approved the document, the signed amendment is attached to the contract repository record.
4. The contract repository record displays the amendment details in the Contract Documents, Contract Requests, and Amendment Field Changes tabs.
5. The signed contract is stored on the ServiceNow instance or an external storage system and referenced in the contract repository. The signed contract and its amendment documents are stored in a centralized repository under the parent contract for easy access and manage all related documents from a single location. The field values that have been modified will be updated in the amendment according to the contract configuration mapping.

Now Assist in Contract Management features for amendment documents

For amendment documents, Now Assist in Contract Management features of obligation extraction or metadata extraction aren't supported. However, Contract Analysis is supported when all the configurations are complete and valid, enabling you to review and analyze amendments effectively.

For more information, see Now Assist in Contract Management.

Approve contracts to allow amendments

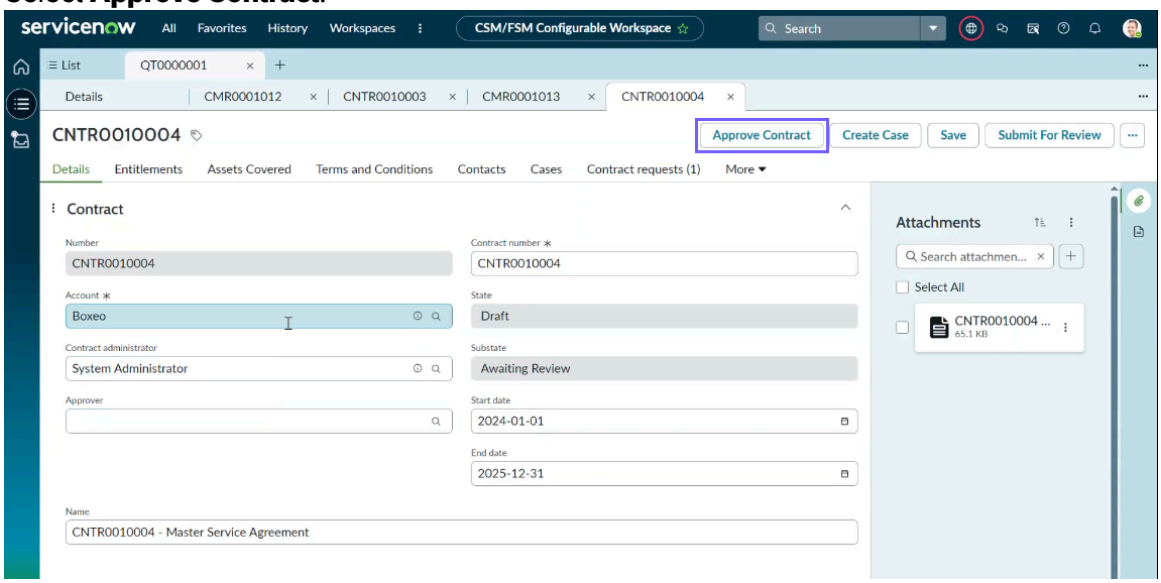
Amendment requests can only be submitted for contracts in the Active state. If a contract is in Draft state and Awaiting Review substate, you need to manually approve it before submitting an amendment request.

Before you begin

Role required: sn_lg_cnt.contract_fulfiller and contract manger

Procedure

1. Navigate to your workspace.
2. Open the contract repository record that is in Draft state and Awaiting Review substate.
3. Select **Approve Contract**.



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Result

The contract will move to either the Draft state-Approved substate or Active state based on its start date.

- If the start date is in the future, the contract moves to the Draft state-Approved substate.
- If the start date is today or in the past, the contract moves to the Active state.

Work on amendment request

Review and work on an amendment request for an existing contract.

Before you begin

The practice area lead or group manager should have assigned you the request. If not, you can open the request to assign it to yourself or someone in the group.

Role required: sn_cm_core.contract_fulfiller

About this task

A sample workflow while working on an amendment request would be:

1. The request is assigned.
2. Link a parent contract if you have the information.
3. Start working on the amendment request.
4. Link a parent contract if not already done.
5. Review the details of the amendment requested.
6. Update the contract details and contract document according to the amendment request.
7. Upload revised contract document using **Create revision** option.
8. Finalizes the contract amendment using the review, approval, and signature workflow.

Procedure

1. Navigate to your workspace.
2. On the **Lists** tab, navigate to **Contract Requests** and open a contract.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on. **c.** If the request is newly assigned to you, se lect **Start Work** to start working on the re quest. The state and the Contract status of the contract request is Work in progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

3. Assign to yourself and start working on an amendment request.
   a. Select **Assign to me**.
   b. Select **Start work**
   The state of the contract request updates to Work in progress.

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4. Link parent contract.

   a. Navigate to the Contract request details section.

   b. In the field, **Parent contract record**, select the Search for Record icon ( ).

   c. Select the contract from the Parent contract pop-up window.

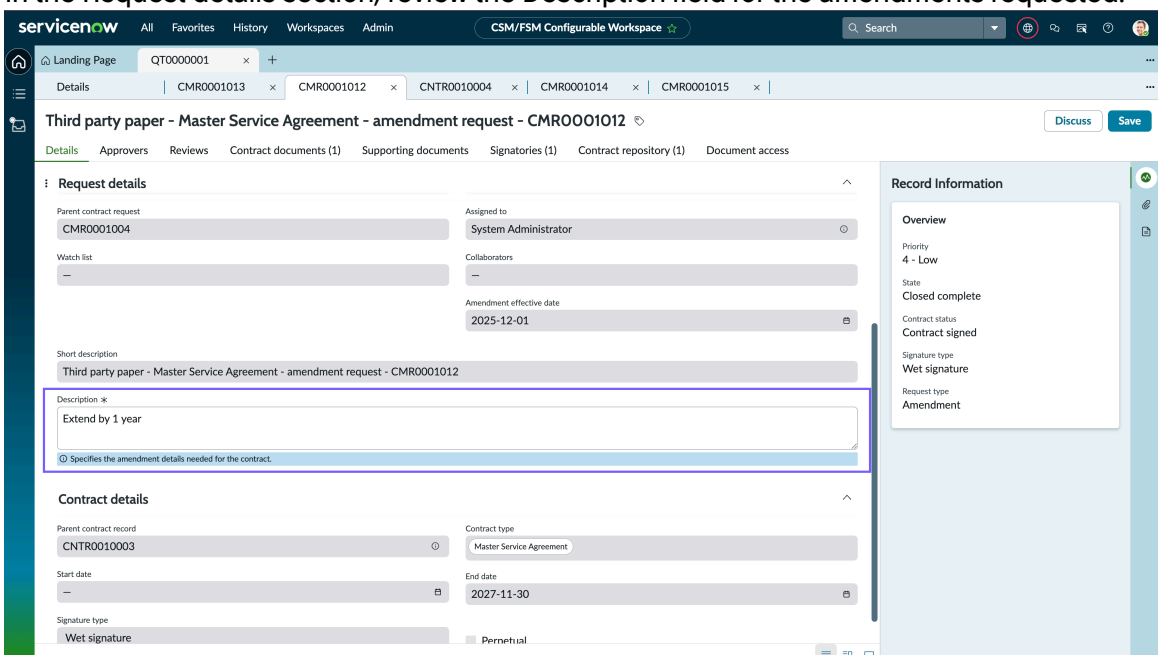
   - Only active contracts and contracts with no pending amendment requests are listed.
   - When a contract is linked, its corresponding contract request (Example: CMR0001186) is automatically link through a parent-child hierarchy. You can't manually unlink the contract request as it depends on the contract selection.

5. Update the field values according to the amendment request.

   To automatically copy values from the parent contract request to the amendment request, you must configure the fields in the *ContractManagementExt* extension point. The values are copied from the parent contract selected during submitting the amendment request.

   For more information, see Copy fields from parent request to contract request.

6. In the Request details section, review the Description field for the amendments requested.



7. Update the contract request.

   a. Change the values of fields that need to be amended.
   For example, if there was a requirement to change the end date, change the date in the **Contract end date** field.

8. Download the contract document.

   a. Navigate to **Contract documents** tab.

   b. Select **Preview document**.

   c. Select the contract type.

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d. Select **Preview**.
The document opens in a new tab.

e. Select the Download icon ( )
The document is downloaded into your system.

f. Edit the document for the amendments requested.
While authoring or negotiating a contract revision, add clauses from the clause library listed in the Microsoft Word add-in for ServiceNow Contracts.

9. Upload the revised contract document.
   a. In the **Contract documents** tab, select **Create Revision**.
   b. In the Create revision dialog box, select the source of the updated contract and upload a new document revision.
   c. **Optional:** Add work notes to provide any information on the attached document.
   d. Select **Create**.
   The attached document is added to the request. The revision number of the latest document is one higher than the previous document revision number. The document is listed in the **Contract document** tab.
10. **Optional:** Add or remove signatories to the contract request.

Options	Steps
Add signatory	Add signatories to the contract request by accessing the **Signatories** tab and selecting **Add**.
Remove signatory	Remove the signatories from the contract re quest by accessing the Signatories tab, select ing the signatory, and selecting **Remove**.

Note: You can add or remove signatories in own-paper based amendment legal requests only when the contract is generated from a template configured with signature blocks.

11. For any metadata or signatory changes, synchronize the document by selecting **Sync document** in the **Contracts documents** tab.
    A new contract document revision is created with the update metadata and signatories. The changes made in the previous revision are retained.
12. Finalize the contract amendment using the review, approval, and signature workflows.

Options	Steps
Ad hoc approval	Initiate an ad hoc approval for a contract doc ument revision
Internal review	Request an internal review.
Email communication	Set up an email to stakeholders to request to have the completed contract document reviewed and the changes confirmed using **Compose Email** option.

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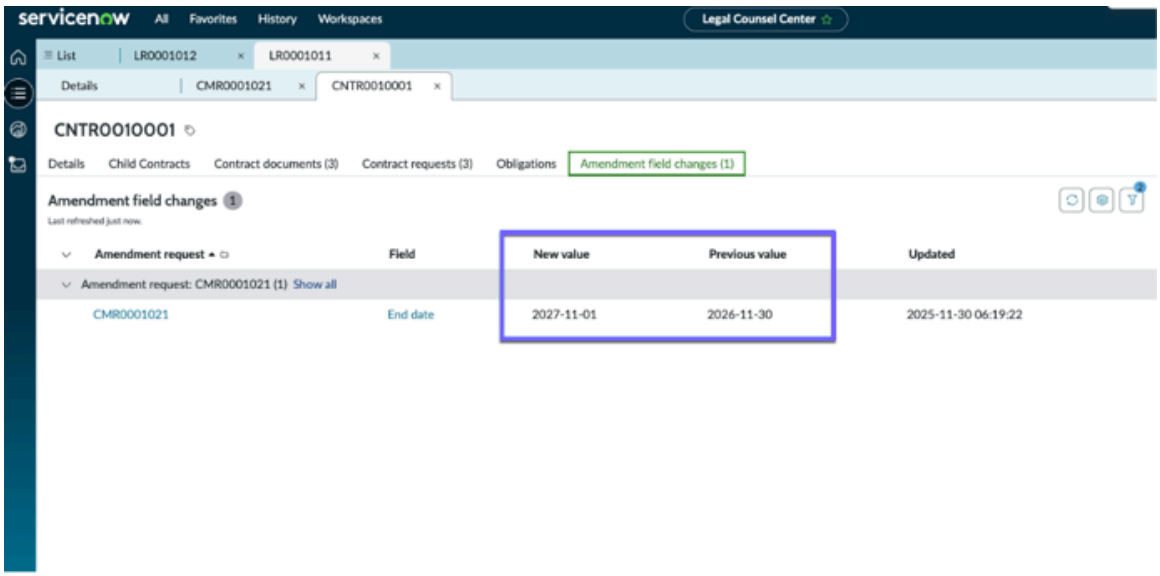
Options	Steps
Signature workflow	

13. Send the contract amendment document for signature.
For more information, see Signature workflow for a request

Result

- When all the signatories have signed the existing Contract Repository record associated with the request is updated with the changes from the amendment.
- The state of the amendment request updates to **Contract signed**.
- In the Related contract request tab, you can view the parent contract child hierarchy is established between the parent contract and the amendment request. You can't unlink the parent and the child contract.
- The following tabs are available within the contract repository record to view the amendment details:
  - Details: View the changes done to the contract request for the amendment request. Example: If the end date is changed, it is reflected in the details section. (Example: If the end date is changed, it will be reflected in the details section.)
  - Contract Documents: Provides access to all signed documents related to the contract, including those generated or updated as part of amendment processes. The amendment contract documents have *Amend<version>* (Example: CNTR0010003 - Non Disclosure Agreement - Amend001) appended to the name. The <version> is automatically incremented for each signed amendment, but not for intermediate amendment versions.
  - Contract Requests: Displays all contract and amendment requests associated with the contract repository record.
  - Amendment Field Changes: Shows a detailed log of all field changes made through amendments. Example: Change in the contract end date is available in this tab.



  - Attachment pane: View the certificate of completion for the contract and amendment requests if electronic signature was selected.

View amendment details

View the amendment details in the contract repository record.

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Before you begin
Role required: sn_cm_core.contract_fulfiller

About this task
For an amendment request, once the contract document is finalized and all signatures are complete, the existing Contract Repository record is updated with the changes from the amendment. In this record, you can view:

- Contract details
- Contract Documents
- Contract requests
- Amendment field changes

You can view the certificate of completion in the Attachment pane.

Procedure
1. Navigate to your workspace.
2. On the **Lists** tab, navigate to **Contract Requests** and open a contract.
3. Navigate to **Contract repository** tab.
4. Select the contract repository record.
5. To view the field changes, navigate to the Details tab.
6. To view all the signed contract and the amendment requests associated with the contract repository record, navigate to **Contract requests tab**.
   The contract and amendment requests associated with the contract request is displayed.
7. To view all the revisions of the contract and amendment documents, navigate to **Contract documents**.
   - The contract and amendment documents associated with the contract request is displayed.
   - The amendment contract documents have *Amend<version>* appended to the name. The <version> is automatically incremented for each signed amendment, but not for intermediate amendment versions.
   - Use **Preview document** option to view the document.
8. To view field changes due to amendment, navigate to **Amendment field changes**.
   Field changes for each of the amendment is displayed along with new and old values.
9. To view certificate of completion for the contract and amendment request, navigate to **Attachments** pane.
   The certification of completion is available for electronic signature workflow only. For more information, see Activate a system property to generate a certificate of completion

Send email to stakeholders

As a contract fulfiller, set up an email to stakeholders to request review of the contract document reviewed and confirm the changes.

Before you begin
Role required: sn_cm_core.contract_fulfiller

About this task
The option to compose an email is available only when the State is Awaiting approval, Awaiting signature, Contract signed or Work in progress.

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Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Select the More Actions icon.
4. Select **Compose email**.
5. In the Compose email pop-up, select the documents to be attached
6. In the **New Email Draft** tab, add recipients' email addresses in the **To**, **CC**, and **BCC** fields as appropriate.
7. Enter the subject of the email in the **Subject** field.
   By default, the short description of the request is populated in the Subject field.
8. Compose an email body.

Action	Steps
Enter your own message.	Enter your message in the text box.
Use Response templates to insert predefined con tent into the email body	○ Select Response Templates icon ( ). ○ Select the appropriate response template. ○ Select **Copy to clipboard**. ○ Paste the content in the email body.
Use Email templates to use predefined template	○ Select Email Templates icon ( ). ○ Select an appropriate response template based on the sub ject of your email. ○ Select **Apply Template** to use the template. **Note:** Only response templates configured for the email channel are available to use. For more informa tion, see

9. Send the email immediately or later, or discard it.

Action	Steps
Send the email immediate ly	To send the email immediately, select **Send email**.
Send the email later	○ In the New Email Draft form, select the More Actions icon To view draft emails, select **View drafts** ○ Select a draft email from the list to load it. ○ If a newer document revision has been posted, you will have to substitute that revision for the document you attached. ○ To send the email, select **Send email**. .
Discard the email	To discard the email, select **Discard draft**.

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Result

After the email is sent, it is added to the activity stream on the request form. Emails you receive from others are also added to the activity stream.
To see a list of available default email notifications, go to **All** > **System Notifications** > **Notifications** and search for the **Contracts Support** category.

For more information, see Create an email notification.

Add clauses during authoring or negotiation

As a contract fulfiller or reviewer, while authoring or negotiating a contract revision, add clauses from the clause library listed in the Microsoft Word add-in for ServiceNow Contracts.

Before you begin

Role required: sn_cm_core.contract_fulfiller or sn_cm_core.contract_reviewer

About this task

When working on own-paper or third party paper based contract document, you can use the clause library to check the document for missing or non-compliant clauses. You can also add clause content from the clause library to the document.
The clause library is available under the following conditions:

- The contract request is in Work in progress state. You are assigned to this request, or you are a group manager or collaborator.
- The contract request is in Awaiting review state. You are assigned the internal review task as a contract reviewer.

Procedure

1. Open the Microsoft Word document that is under review or negotiation.
2. From the Microsoft Word ribbon, select ServiceNow Contracts add-in.
3. On the add-in login screen, enter the credentials of the ServiceNow instance from where you downloaded the manifest file.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. Select the **Clause library** tab.
5. Search the clause by using the clause name.

   Active clauses for the contract type that is associated with the contract document is displayed.
6. Select the clause in the library.
7. Select the content in the document where you want to add the clause.
8. Select **Use this clause** for a specific clause that is applicable.
   The clause is added to the document. When a valid metadata mapping exists within clause content, the metadata gets auto-populated. Otherwise, a content control tag name is added and the metadata has to be manually updated. For more information, see Configure metadata for fields, variables, and variables sets in a contract document.

Create a document revision

As a contract fulfiller, create a document revision to upload an updated version of the contract that contains the latest changes in the contract request, corrections, or suggestions from a third party.

Before you begin

Role required: sn_cm_core.contract_fulfiller

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About this task

You can create document revisions only when the State is Work in progress.

Note: If the contract type is inactive, the **Create revision** button isn't available for self-served contract requests.

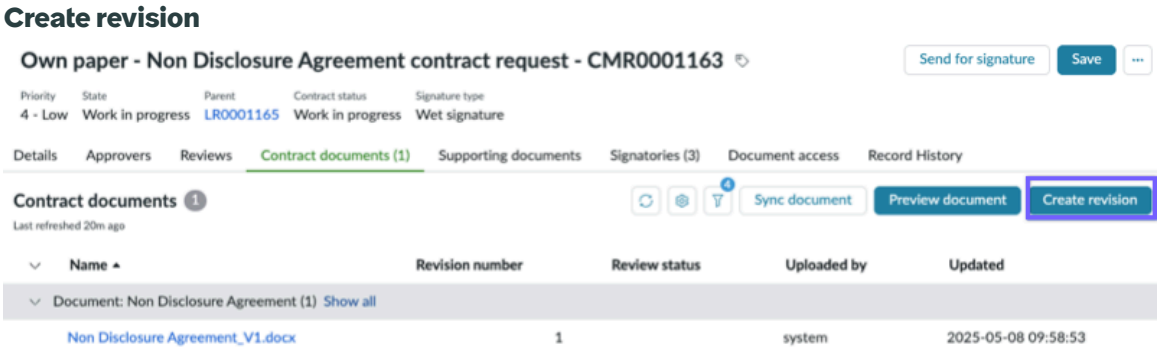
Procedure

1. Open a contract request from the workspace you are using.

Steps for opening a contract request from your workspace

Method	Steps
Contract Workspace	○ Navigate to **All→Contract Workspace**. ○ Select the list icon ([List icon]). ○ Select **Contract requests→All** ○ Select a contract request.
Workspace used by your application	○ Navigate to your workspace. ○ Open the list that displays the contract requests. ○ Select a contract request.

2. In the **Contract Documents** tab, select **Create Revision**.



3. In the **Create revision** window, upload the updated contract.

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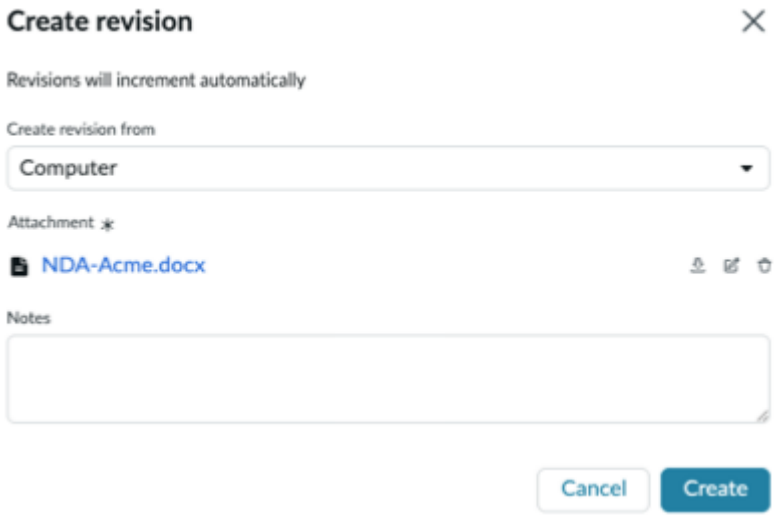
Create revision pop-up window



a. For non-self-served requests, select the contract type in the **Select contract type** field. Only active contract types are displayed in the list.

> **Note:** The field is available only for multiple contracts type contract requests.

b. In the **Create revision from** drop-down list, select the source of the updated contract and add the file.

Computer

Select this option to upload a file from your system. The **Attachment** field appears upon selecting this option. Select **Attach File** and upload the updated contract from your system.

Activity stream

Select this option to select a document from the activity stream. The **Document** field appears upon selecting this option. Select the document in the activity stream.

The activity stream includes documents attached while requesting changes for a contract or documents received through email.

External storage

Select this option if external storage is enabled. The **Document** field appears upon selecting this option. Select the updated contract from external storage.

4. Select **Create**.

The document is added to the contract request. The revision number of the latest document is one higher than the previous document's revision number. The document revision is listed in the **Contract Documents** tab.

5. Select **Save**.

Internal review overview

Get your contract document reviewed by internal subject matter experts who have the expertise you need.

A workflow for getting content reviewed by subject matter experts might progress as follows:

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1. For self-served contract requests, contract user submits a change request to the fulfiller for the content that needs internal review.

   Note: For non- self-served contract requests, the contract user cannot create a change request. Instead, the contract fulfiller creates a task for internal review.

2. The contract fulfiller submits a review task when contract request is in Work in progress or Awaiting review State.
3. The contract reviewer or the manager assigns the review task.
4. The assigned contract reviewer starts working on the contract document.
5. If the information is incomplete, the contract reviewer requests more information from the contract fulfiller.
6. If a request for more information was submitted, the contract fulfiller shares the information.
7. The contract reviewer reviews the document, accept, reject, or proposes edits, and adds comments.
8. The contract reviewer completes the review and shares the updated contract document if available.
9. The contract fulfiller receives updated document and makes the necessary changes based on the feedback.
   - For internal storage - If any changes are required, the contract fulfiller updates and finalizes the document.
   - For external storage - Reviewers collaborate on the contract document revision online in real time. Once the review is complete, the fulfiller can update the document directly online or download it to make updates offline.
10. Contract fulfiller uploads the finalized document using the **Create revision** option from the Contract Documents tab.

The contract request remains in the Awaiting review State until a review task is active.

Request an internal review

Initiate a review of the contract document by internal subject matter experts.

Before you begin

- For self-service contract requests, you may want review and feedback from the internal subject matter experts. If needed, the contract requester can submit a change request to the contract fulfiller. The contract fulfiller then submits a review task with the change request details. For more information, see Review a contract document in your workspace.
- For non- self-served contract requests, the contract user cannot create a change request. Instead, the contract fulfiller creates a task for internal review.

Role required: sn_cm_core.contract_fulfiller

About this task

- You can raise a review task when the contract request State is Work in progress or Awaiting review.
- You can create parallel review tasks for the same contract document for different reviewer groups. You cannot create a review task for the same document with the same reviewer group if another active task already exists.

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Procedure

1. Open the contract request from workspace that you are using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ). **c.** Select **Contract requests** > **All** **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. Select the Reviews tab.
3. Select **New task**.
4. On the Create New Review Task form, fill in the details.

Create task for requesting internal review

Field	Value
Contract type	Contract for which you want to submit an internal review request. **Note:** The field is auto-populated when there is only one contract type. The latest revision of contract document is sent for review
Due date	Date to complete the task.
Priority	Level of priority to address the review request.
Assignment group	User group with contract reviewer role to which the task is assigned.
Assigned to	User to whom the task is assigned. If an assignment group is selected, the list shows members of the selected group.
Instructions	Description to specify the content to be reviewed.

5. Select **Create**.

Result

A review task is created, listed in the Reviews tab and the change request details are added to the Activity stream. The Contract status updates to Awaiting review. If the new task doesn't appear in the list, click the refresh list button ( ).

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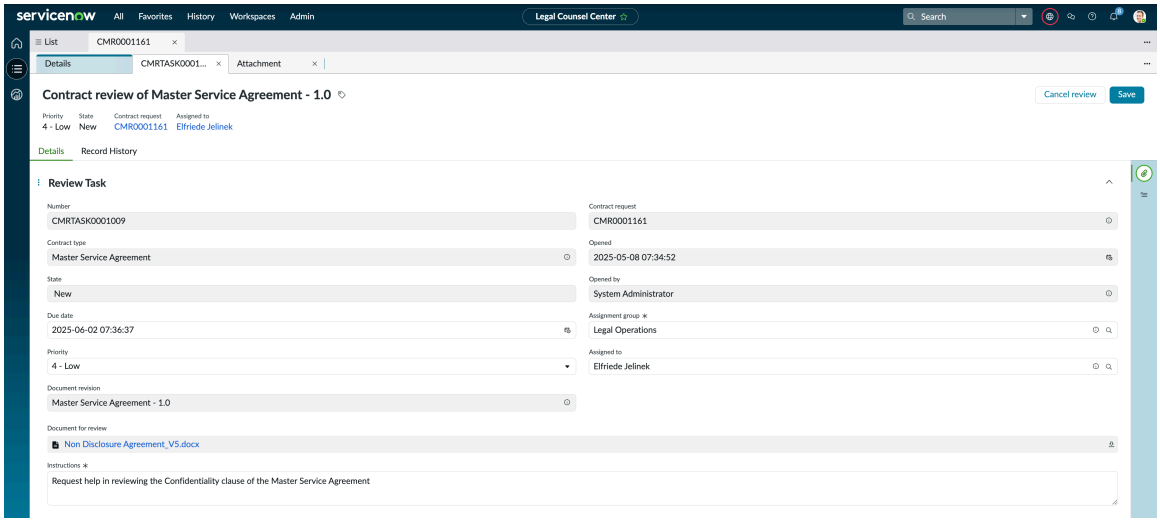

Work on internal review task

As a contract reviewer, review and provide feedback on contract documents

Before you begin

Role required: sn_cm_core.contract_reviewer

Procedure

1. Open the review task from workspace that you are using.

Method	Steps
Contract Workspace Review tasks listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ). **c.** Select **Review tasks** **d.** Select **All** or **Unassigned**. **e.** Open the review task from the list
Contract Workspace landing page	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the **Review task** card. **c.** Open the review task from the list
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the review tasks. **c.** Open the review task from the list.
Contract Request Reviews tab	○ Navigate to Contract Workspace or your workspace. ○ Open a contract request. ○ Select **Reviews** tab. ○ Open the review task from the list.

2. If the review task is not already assigned, select **Assign to me**.

3. Select **Start work**.

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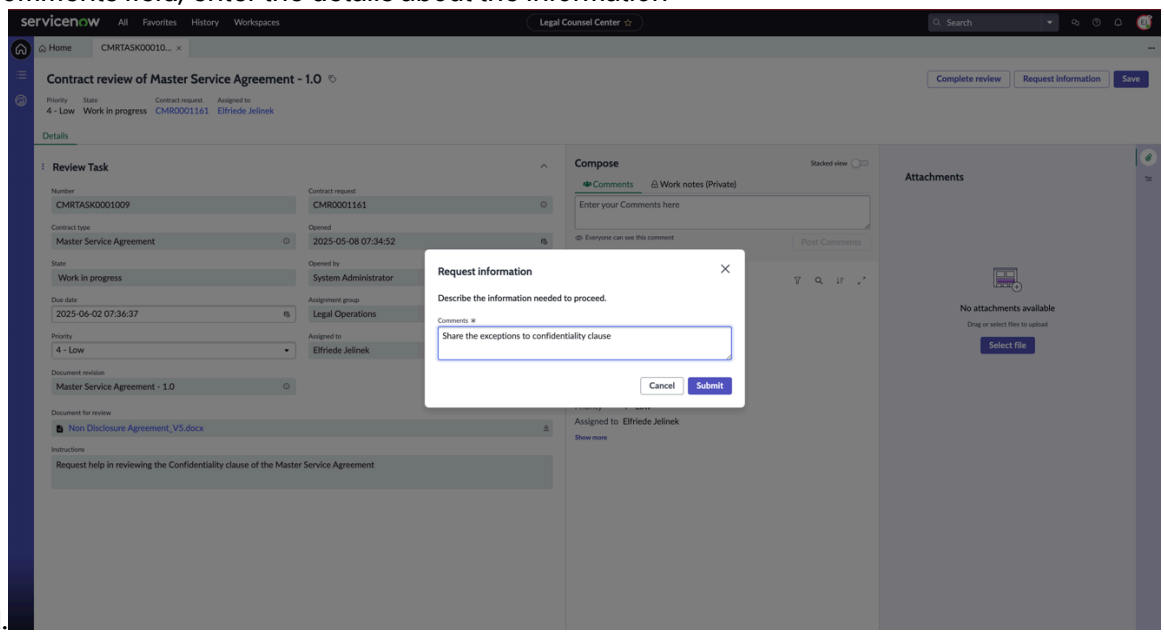
4. Open the contract document.
   - Internal storage: Download the document.
   - External storage: Select the document link to open it.
5. If you need additional context to review the document, request more information.

   a. Select the More Actions icon ( ).

   b. Select **Request information**.

   c. In the Comments field, enter the details about the information needed.



   d. Select **Submit**.
   The contract request Status and the review task State changes to Awaiting information and you can proceed with review after receiving information.

6. Share the review feedback
   The reviewer edits the document, suggest changes through comments, and approve or reject any redlines.

Type of storage	Steps
Internal storage	**a.** Select **Complete review**. **b.** If you have a modified contract document to share, select **Yes**. **Note:** If you do not have modified contract document to share, select **No** and enter work notes in the Com ments field **c.** Select **Attach file** link and select a file.

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Type of storage	Steps
	d. In the Comments field, enter work notes. **e.** Select **Submit**.
External storage	**a.** Select **Complete review**. **b.** In the Comments field, enter work notes. **Note:** The attach file option is not available as the contract document is directly edited in the external storage. **c.** Select **Submit**.

The review task will be closed, work notes are added to the Activity stream, and the State changes to Closed Complete. The attached document will be available in Reviewed document field of the Details tab of the review task.

What to do next

After the completing the review task, the fulfiller will have to create a revision of the finalzed contract document.

Share requested information for internal review

As a contract fulfiller, share information requested by the reviewer to proceed with the contract document review.

Before you begin

Role required: sn_cm_core.contract_fulfiller

About this task

The work notes added when requesting information are available in the Activity stream. Review the information needed and gather the information to be sent to the reviewer.

Procedure

1. Open the review task from workspace that you are using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ). **c.** Select **Review tasks** > **All** **d.** Open the review task from the list
Contract Workspace landing page	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select **Review task** card. **c.** Open the review task from the list

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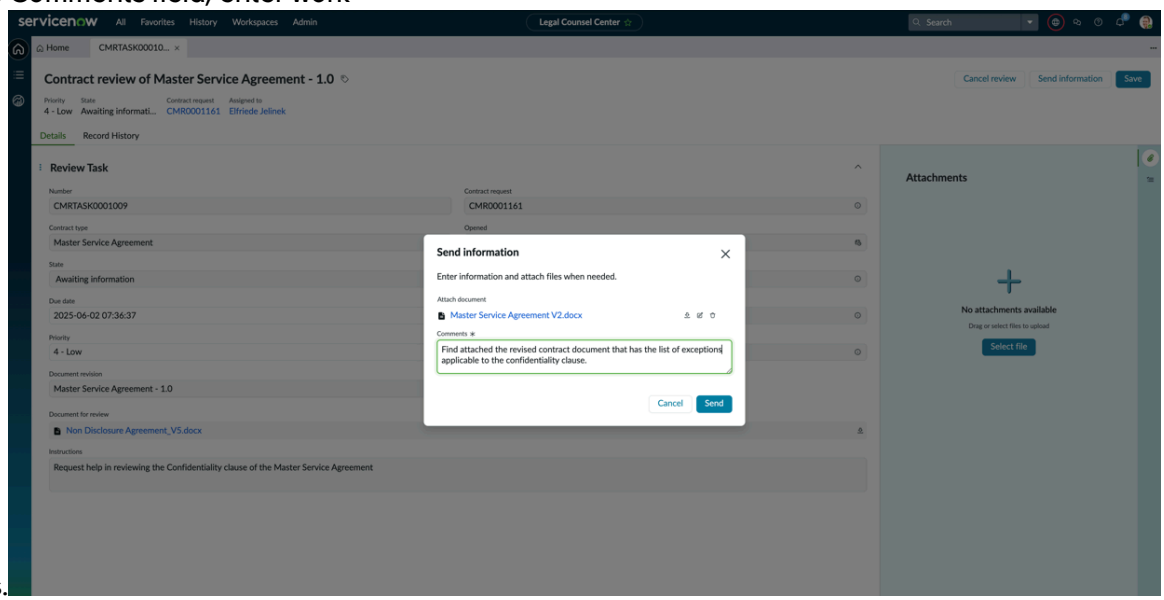
Method	Steps
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the review tasks. **c.** Open the review task from the list.
Reviews tab	○ Navigate to Contract Workspace or your workspace. ○ Open a contract request. ○ Select **Reviews** tab. ○ Open the review task from the list.

2. Select **Send information**.
3. If you have document to be shared, select **Attach file**.
4. Select the file to be shared.
5. In the Comments field, enter work notes.



6. Select **Send**.

Result

The information is shared with reviewer and the review task State changes to Work in progress.

Cancel an internal review task

As a contract fulfiller, cancel a review task irrespective of its state.

Before you begin

Role required: sn_cm_core.contract_fulfiller

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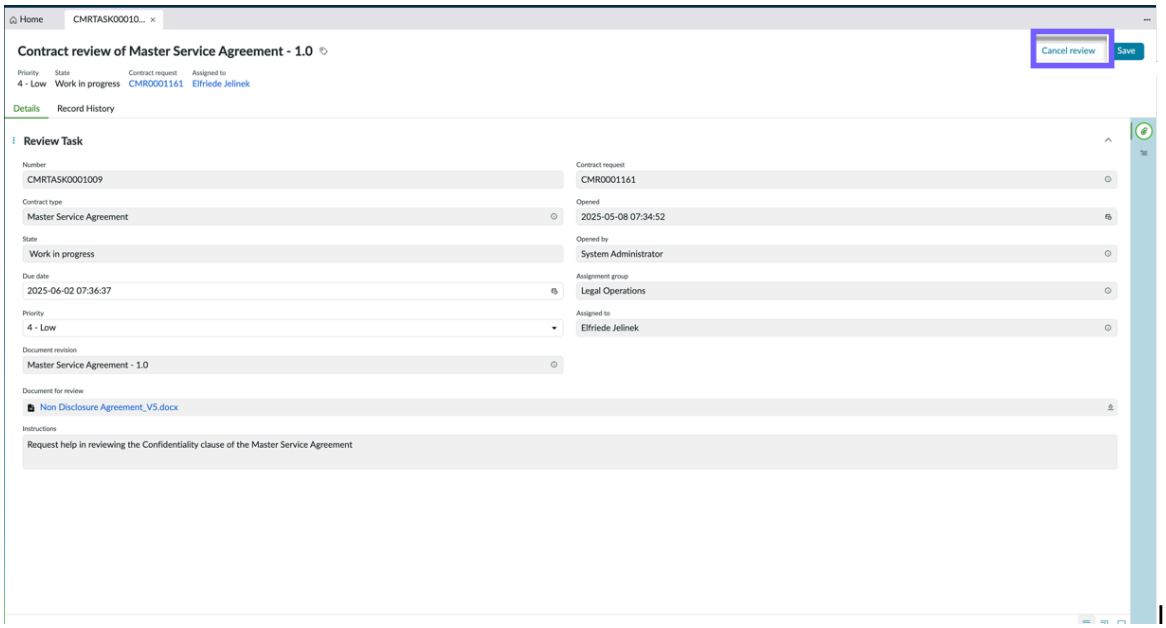
Procedure

1. Open the review task from workspace that you are using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ). **c.** Select **Review tasks** > **All** **d.** Open the review task from the list
Contract Workspace landing page	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select **Review task** card. **c.** Open the review task from the list
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the review tasks. **c.** Open the review task from the list.
Reviews tab	**a.** Navigate to Contract Workspace or your workspace. **b.** Open a contract requests. **c.** Select **Reviews** tab.

2. Select **Cancel review**.



If you have selected **Cancel review** from the Reviews tab, select the review task to be canceled in the pop-up window.

3. In the Comments field, enter information for canceling the request
4. Select **Yes, cancel**.

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Result

- The review task is canceled and the cancellation comments appear in the Additional Comments section of the contract request.
- When all the review tasks are cancelled or closed, the contract request State updates to Work in progress.

Linking parent-child contracts

Link a parent contract to a child contract to establish hierarchical relationships between contract requests and inherit fields from the parent contract request.

You can associate a contract request with a parent contract from the Related Contract Request tab. When linked, the **Parent contract** field in the contract request Details tab is automatically populated with the parent contract request number. Depending on configuration, child contracts can inherit fields from the parent contract. Additionally, the associated contract repository records for the parent and child contract requests are automatically linked.

To link a contract as a parent, the following conditions must be met:

- The user must be assigned to the contract request, be a group manager, or a collaborator.
- The contract request must be in one of the following states: Draft, Work in progress, Awaiting review, or Contract signed.

  Note: If the contract request is in Contract signed state, the parent contract request must be in Contract signed or Closed complete state.

- The parent contract must not be in a Canceled state.
- Only one parent contract can be selected while linking.
- The parent contract must be a single contract type using own paper or third-party paper.

Related topics

Link parent contract requests

Link and inherit parent contract fields

Remove a linked contract

Configure field mapping for parent-child contract linking

Link parent contract requests

Link parent contracts during drafting and negotiation phases to establish hierarchical relationship between the parent and child contracts.

About this task

The following video walks you through the process of linking a parent contract request.

https://player.vimeo.com/video/1101938972?h=8d6091b955&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Ensure that the contract request is in Draft, Work in progress, Awaiting review, or Contract signed state.

Note: If the contract request is in Contract signed state, the parent contract request must be in Contract signed or Closed complete state.

You must be either assigned to the contract request or a group manager or a collaborator.

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Ensure that the parent contract is a single contract type using own paper or third-party paper.

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Open the contract request from workspace that you are using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ). **c.** Select **Contract requests** > **All** **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. Select the Related contract requests tab.
3. Select **Link parent contract**.
4. In the Link contract window, select the check box corresponding to the contract request that you want to link as a parent contract.

Note: You can select only one contract request when linking it as a parent contract.

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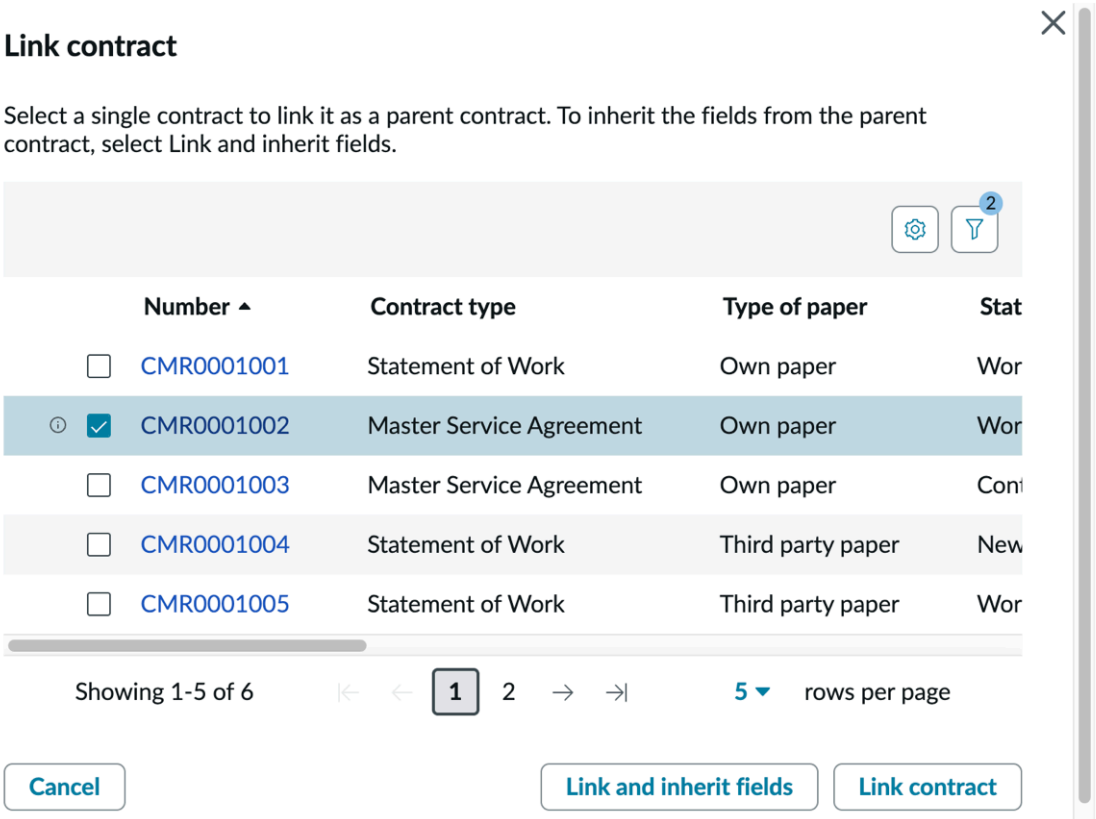
Link contract window



5. Select **Link contract**.
   The selected contract request is linked as a parent contract. The parent-child relationship appears in a hierarchical order in the Related contract requests tab.

   The associated contract repository records for the contract requests are automatically linked.

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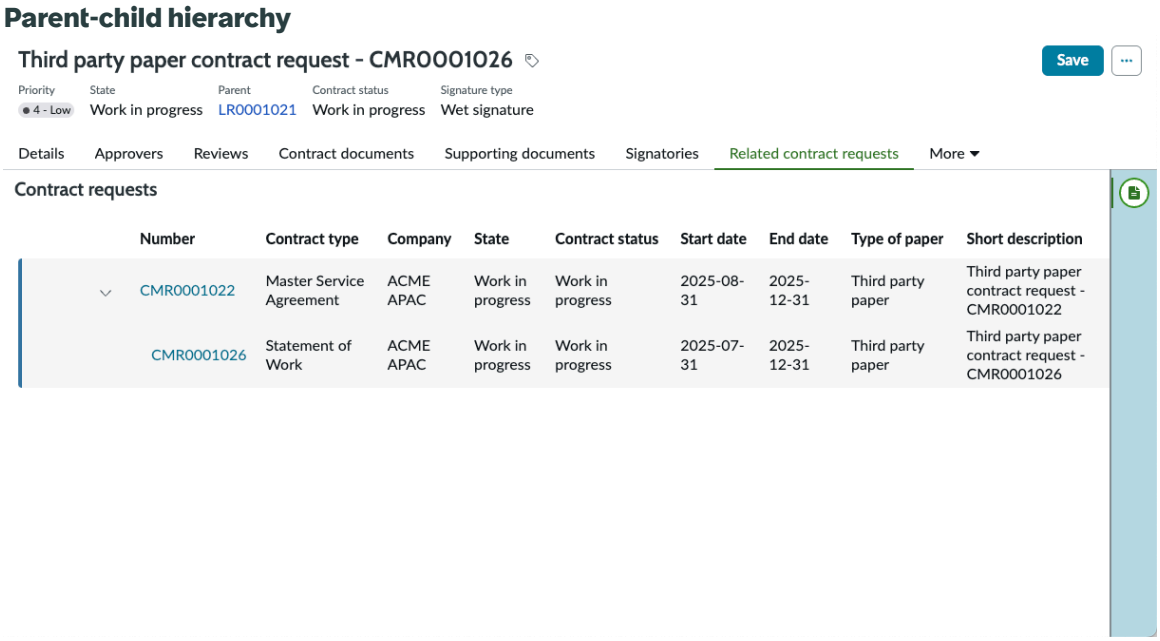
The **Parent contract request** field is updated with the parent contract request number. The linked parent contract details appear in the activity stream.



Link and inherit parent contract fields

Link parent contracts during drafting and negotiation phases to establish hierarchical relationship between the parent and child contracts, and automatically inherit the configured fields from the parent contract.

About this task

The following video walks you through the process of linking a parent contract request and inheriting its fields.

https://player.vimeo.com/video/1101938996?h=aa72ebab4a&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Ensure that the contract request is in Draft, Work in progress, or Awaiting review state.

You must be either assigned to the contract request or a group manager or a collaborator.

Ensure that the parent contract is not a multiple contracts type third-party contract request.

Ensure that the parent child mapping is configured. For more information, see Configure field mapping for parent-child contract linking.

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Open the contract request from workspace that you are using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ).

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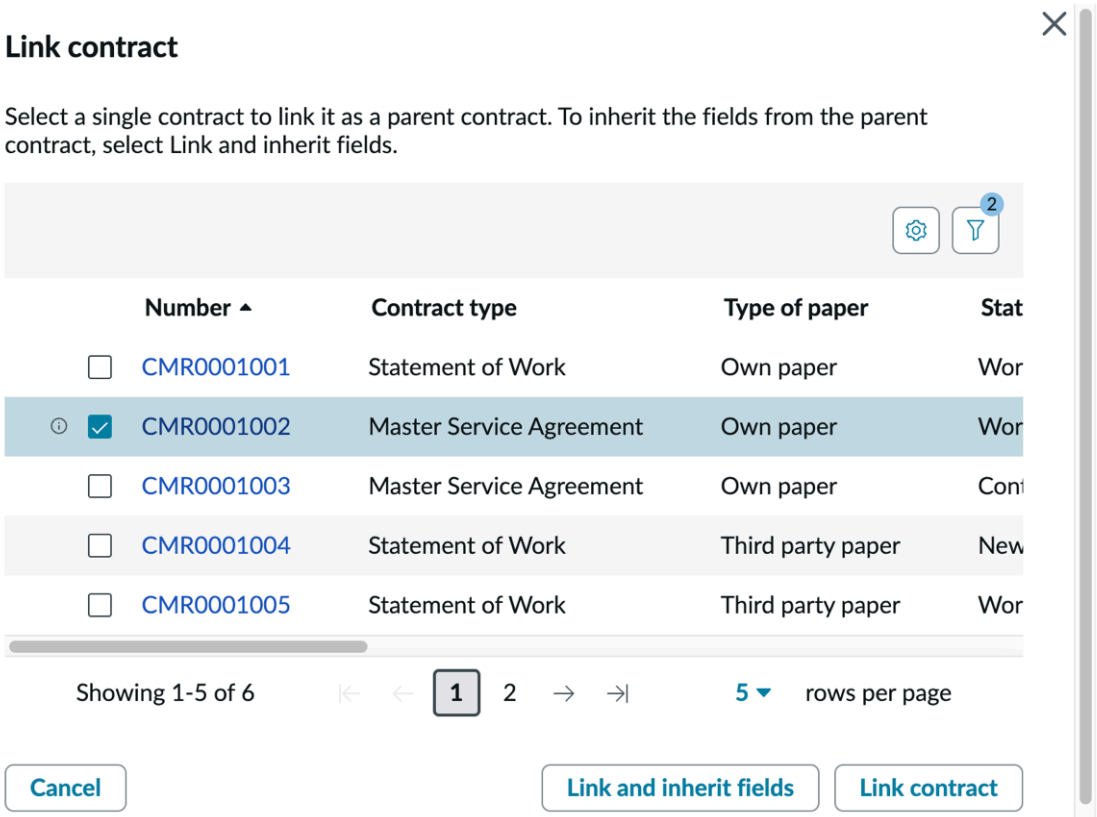
Method	Steps
	c. Select **Contract requests** > **All** **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract requests. **c.** Select a contract request.

2. Select the Related contract requests tab.
3. Select **Link parent contract**.
4. In the Link contract window, select the check box corresponding to the contract request that you want to link as a parent contract.

   Note: You can select only one contract request when linking it as a parent contract.

   Link contract window



5. Select **Link and inherit fields**.
   The selected contract request is linked as a parent contract and its fields are inherited by the child contract. The parent-child relationship appears in a hierarchical order in the Related contract requests tab.

   The associated contract repository records for the contract requests will be automatically linked.

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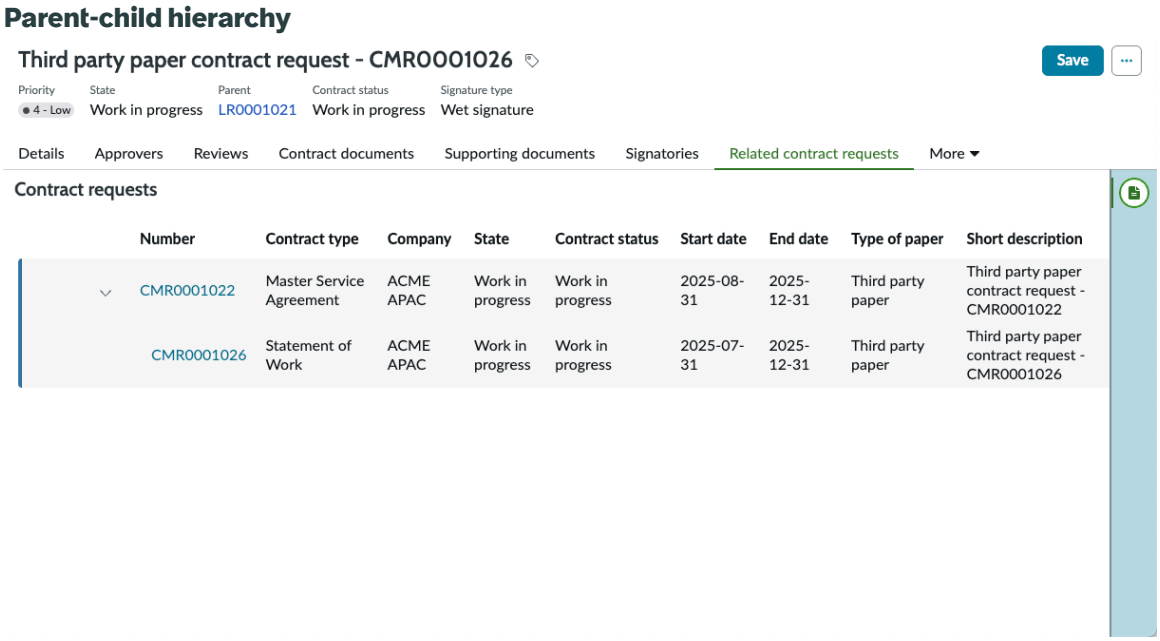
The **Parent contract request** field is updated with the parent contract request number. The linked parent contract details appear in the activity stream.



Remove a linked contract

Remove a linked parent contract from contract requests when you have linked a wrong contract request or the linking is no longer required.

Before you begin

Role required: sn_cm_core.contract_fulfiller

About this task

The **Remove linked contract** button is not available when there are no linked contracts in the contract request.

Procedure

1. Open the contract request from workspace that you are using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Click the list icon ( ). **c.** Select **Contract requests** > **All** **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. Select the Related contract requests tab.

3. Select **Remove linked contract**.

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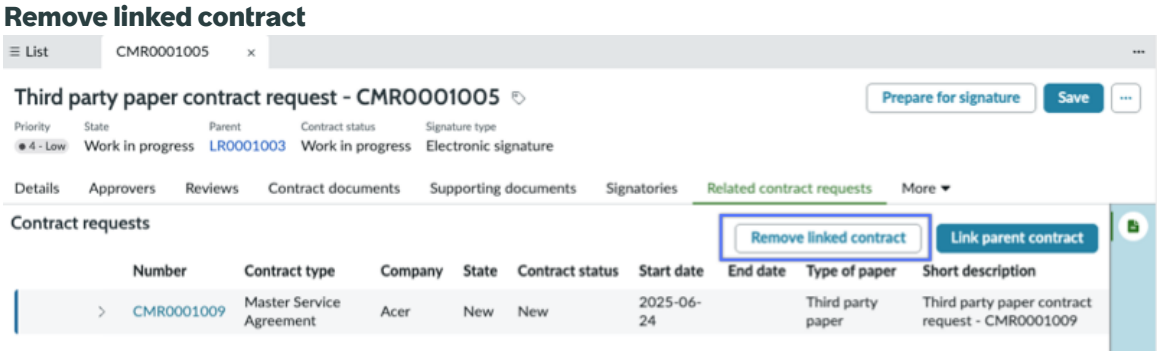

4. In the confirmation message, select **Remove**.
   The linked parent contract request is removed and the associated contract repository records are unlinked.

   The parent-child hierarchy is updated to display only linked child contracts.

   The parent contract request number is removed from the **Parent contract request** field. The activity stream displays the parent-child linking history.

Initiate an ad hoc approval for a contract document revision

Initiate an ad hoc approval for a contract document revision from a user or a user group.

Before you begin

Role required: sn_cm_core.contract_fulfiller

About this task

You can request for approval of a revision for contract documents from stakeholders. Here is how the flow works:

- You can assign the approvals to a user or user group in your organization. Users with the group manager or contract fulfiller roles who are in the **assigned to** or **collaborator** fields can raise the approval for the revision.
- When you initiate an approval, the approvers receive an email notification and can act on the approval.
- An approver who does not have access to the contract revision is granted read-only access to the record until the assigned approval record is completed.

Note: Only latest revision of specific contract type is sent for approval. If an approval of specific revision is pending, you cannot initiate another approval for the same.

Procedure

1. Navigate to your workspace.
2. Click the list icon ( ).
3. In the **Lists** tab, open a request by selecting an option under **Contract Requests**.

Option	Steps
As an assignee	**a.** Select the **Assigned to Me** option. **b.** Select a request to work on.

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Option	Steps
	c. If the request is newly assigned to you, se lect **Start** to start working on the request. The state of the request is Work in progress and the contract status is also work in progress.
As a collaborator	**a.** Select the **Collaborations** option. **b.** Select a request to work on.

4. In the **Approvers** tab, click **Initiate Approval**.

   You can also initiate an approval by clicking the more actions button ( ) and selecting **Initiate Approval**.

5. On the Initiate Approval dialog box, fill in the fields.

Initiate Approval dialog box

Field	Description
Contract type	From the drop-down list, select only one category of the contract type, for example, **Order Form**. **Note:** When you have only one contract type, then it is auto-populated.
Document revision	The latest revision of the document . For example `Order Form - 1.0`. The number reflects the latest document revision. The revision number is visible from the Approving field. **Note:** The revision number of the latest document is one higher than the previous revision number.
Approval by	Approval required at user level or user group level. ○ **User**: Get approval from an individual user. ○ **User group**: Get approval from a set of users. The **Select user** field is replaced by the **Select user group** field.
Select user	User or user group who must approve the item. If you selected **User** in the **Approval by** field, select a user from whom the approval is required. **Note:** If you selected **User** in the **Approval by** field, an approval record is created for the selected user.

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Field	Description
Select user group	User or user group who must approve the item. If you selected **User group** in the **Approval by** field, select a user group from whom the approval is required. **Note:** If you selected **User group** in the **Approval by** field, an approval record for each user in the selected user group is created. Anyone from the group can approve.
Approval note	Note for the selected user or user group.

6. Click **Initiate**.
   All the approval records are listed and the approval status changes to **Requested**.

Result
Assigned approvers are added in the **Approvers** tab with other approval details. The assigned approvers get an email notification with a link to open the record for action.

Note: The contract type revision number is visible from the Approving field of the **Approvers** tab.

What to do next
Approvers can view and Approve or reject a contract document.

Approve or reject a contract document

Review a contract request or attachment and approve or reject it.

Before you begin
You must have received an email notification with a link to the request for approval.
Role required: sn_cm_core.contract_fulfiller

Procedure
1. Open the approval record from the email notification, Self-Service, or Employee Center portal.

Options	Steps
From the email notification	Click the link in the email to open the record that needs approval.
From Self-Service	**a.** Navigate to **All** > **Self-Service** > **My Approvals**. **b.** In the My Approvals list, click a record to open for approval.
From Employee Center	**a.** In the Employee Center portal, on the menu bar, click the **My Tasks**. **b.** In the My To-dos list, click a record under the **Open** tab to open for approval.

2. Review the record and either approve or reject:

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- To approve the record, click **Approve**.
- To reject the record, enter comments for rejection in the **Comments** field and click **Reject**.

Note: View the contract revision document available as the attachment on the internal storage or with the view access on the external storage.

Result

The following table shows the result of approve and reject actions on the approval record. Contract fulfiller and collaborators get an email notification about the approval or rejection.

Result of approving or rejecting an item

Approve	Reject
• The state of approval record updates from Requested to Approved. If the requested item was assigned to a user group for approval, then the state of the approval records for the remaining users updates from Requested to No Longer Required. • Any approver who isn't added to **Watch list** in the request loses access to the approved contract document.	• The state of approval record updates from Requested to Rejected. If the requested item was assigned to a user group for approval, then the state of the approval records for the remaining users updates from Requested to No Longer Required. • The rejection comments posted by the approver are added to the requests Activities section. • Any approver who isn't added to **Watch list** in the request loses access to the rejected contract document.

Cancel an ad hoc approval for a contract document revision

Cancel an ad hoc approval for a contract document revision if it no longer requires any action.

Before you begin

You can only cancel an ad hoc approval that is in the Requested state.

Role required: sn_cm_core.contract_fulfiller

About this task

Procedure

1. Navigate to your workspace and open the contract request.
2. In the **Approvers** tab, click **Cancel Approval**.
3. In the Cancel Approval dialog box, select the approval record from the **Approval for** field that you want to cancel.

   Note: When you have only one contract document, then it is auto-populated.

4. Enter comments for canceling the approval record and click **Confirm Cancellation**.

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Result
The approval record is canceled and its state updates to Cancelled and comments are added to the approval record. If the approval was requested from a user group, then the corresponding approval records for all users in the user group are canceled.

Compare contract revisions in Contract Management Pro

Streamline the contract negotiation process by comparing two contract revisions to quickly identify and review all changes between the two versions, thereby reducing manual effort and minimizing the risk of missing critical updates.

Before you begin
Role required: sn_cm_core.contract_user

About this task
During contract negotiations, different parties update a contract and share contract revisions. As a contract fulfiller, use the document comparison feature in Contract Management Pro to easily compare two versions of a contract document.

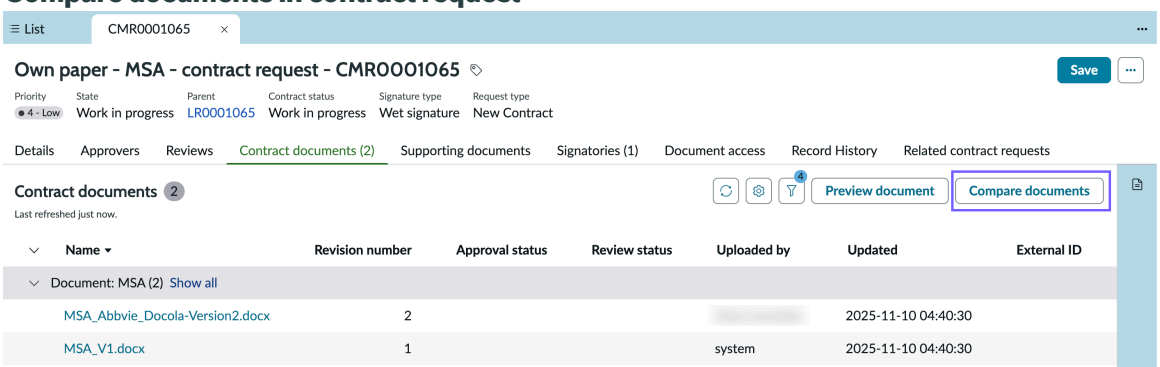
Procedure
1. Open a contract request from the workspace you are using.

Steps for opening a contract request from your workspace

Method	Steps
Contract Workspace	○ Navigate to **All** > **Contract Workspace**. ○ Select the list icon ( ). ○ Select **Contract requests** > **All** ○ Select a contract request.
Workspace used by your application	○ Navigate to your workspace. ○ Open the list that displays the contract requests. ○ Select a contract request.

2. In the **Contract documents** tab, select **Compare documents**.

Compare documents in contract request



3. In the Compare documents window, select the contract type and documents you want to compare.

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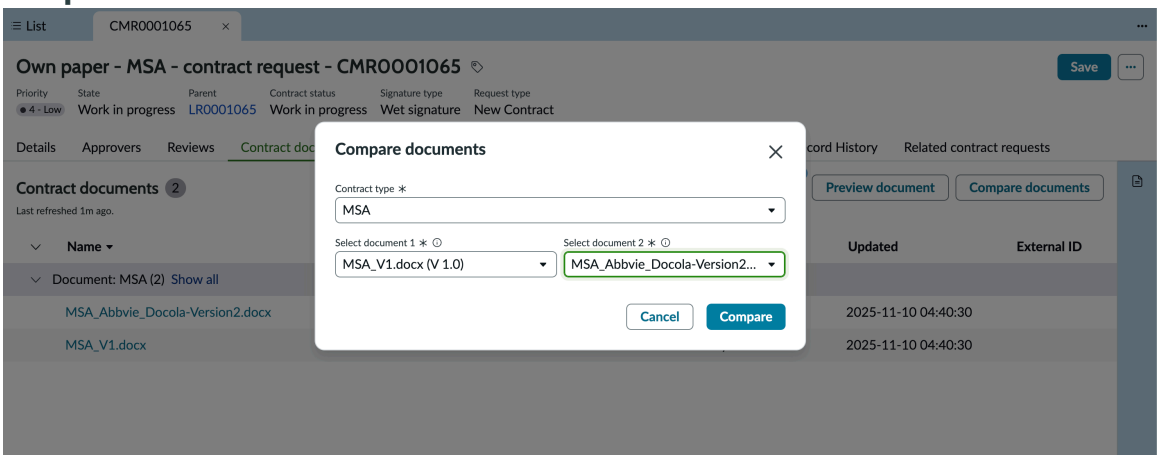
Compare document window



Note: You can only compare files in .doc and .docx format.

a. In the **Contract type** field, select the contract type.
For single contract type contract requests, this field is automatically updated.

b. In the **Select document 1** field, select a lower version of the contract document you want to compare.
Document revisions are listed in ascending order, with older versions appearing above newer ones.

c. In the **Select document 2** field, select a higher version of the contract document.
Document revisions are listed in descending order, with the latest version at the top.

d. Select **Compare**.

For internally stored documents, the comparison opens on a new tab displaying the comparison summary with total changes, added, deleted, and format changes. The deletions are highlighted with red strikeout, additions are highlighted in green, and formatting changes are highlighted in cyan.

For externally stored documents, the comparison is processed in the background. You receive a notification in the application and through an email when the comparison is ready. Select the link in the notification to view the document comparison.

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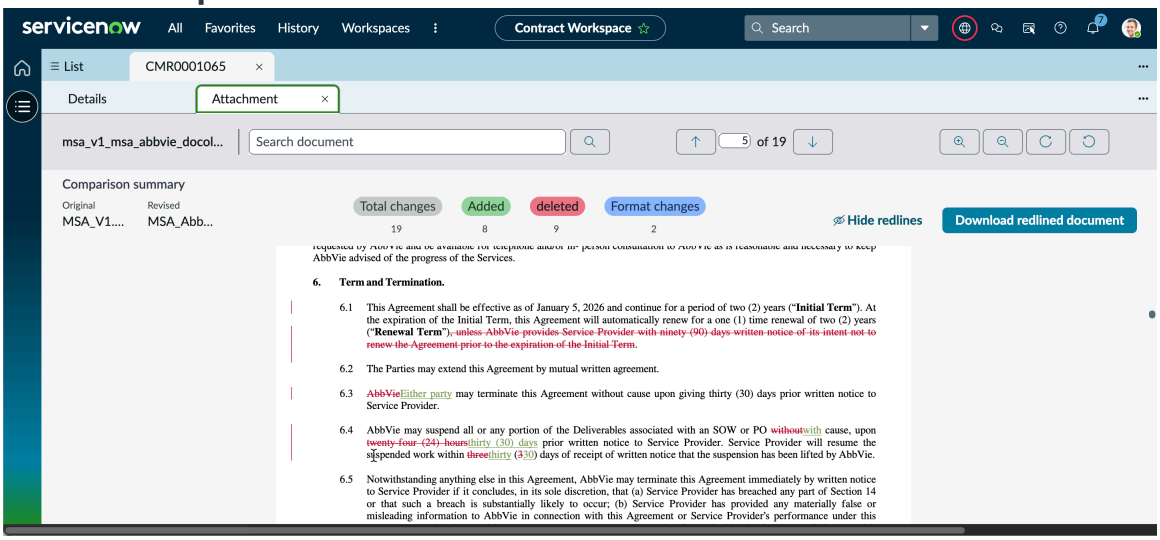
Document comparison



4. **Optional:** Select **Hide redlines** to hide the highlighted changes.
5. **Optional:** Select **Download redlined document** to download the document, and make further modifications to it.

Ask Now Assist to generate summary of contract documents in a contract request

Generate summaries, frequently asked questions (FAQs), or ask questions to retrieve specific information from contract documents in Contract Management Pro.

Before you begin

- The smart documents skill must be activated. For more information, see .
- Your role and relevant tables must be configured to use this feature. For more information, see Configuring contract summarization for Contract Management Pro.
- The Now Assist panel must be enabled. For more information, see Turn on the Now Assist panel .
- Role required: sn_cm_core.contract_fulfiller

About this task

Use the Smart Documents capability in Now Assist for ServiceNow AI Platform to generate a summary and FAQs from contract documents, and ask questions in the Now Assist panel to retrieve specific information from contract documents.

Procedure

1. Open a contract request from the workspace that you are using.

Steps for opening a contract request from your workspace

Method	Steps
Contract Workspace	○ Navigate to **All** > **Contract Workspace**. ○ Select the list icon . ○ Select **Contract requests** > **All**. ○ Select a contract request.

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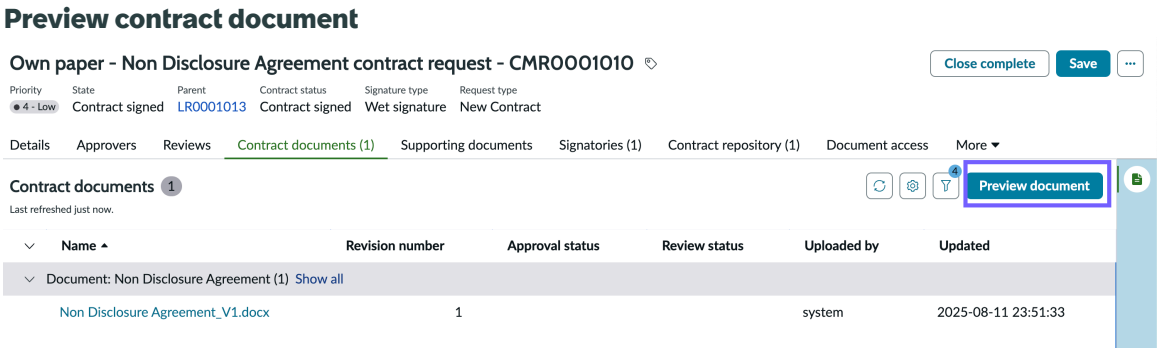
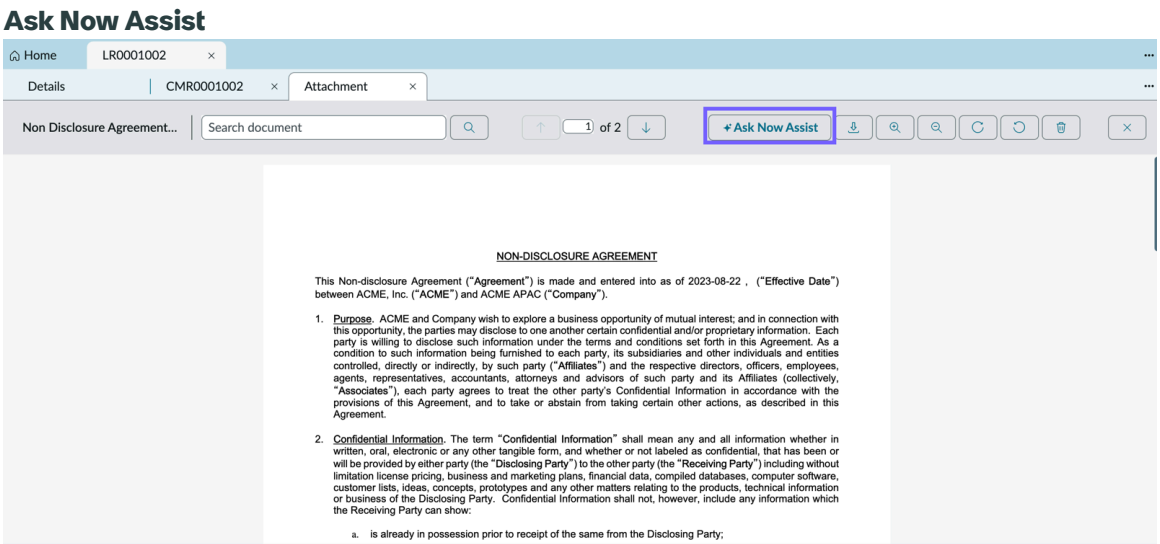
Method	Steps
Workspace used by your application	○ Navigate to your workspace. ○ Open the list that displays the contract requests. ○ Select a contract request.

2. In the **Contract documents** tab, select **Preview document**.



3. In the Preview document window, select the contract type, and then select **Preview**.
   The contract document opens in a document viewer.
4. Select **Ask Now Assist**.



The Now Assist panel opens where you can select the option to summarize the contract, generate FAQs from the document, or ask questions to gain specific insights on the document.

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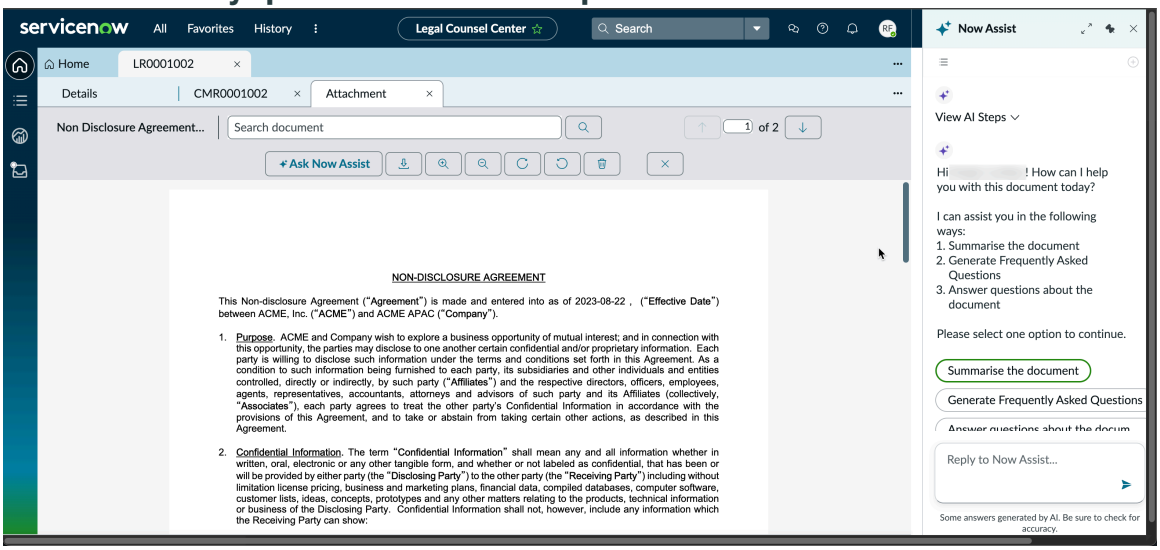
Contract summary options in the Now Assist panel



For more information on using Now Assist for generating summaries, see and .

You can also summarize supporting documents and signed contracts using Ask Now Assist in the document viewer.

Signature workflow for a contract request

Contract Management Pro supports electronic signature or wet (manual) signature for a contract request.

- Electronic Signature: Enables signatories to sign the contract document electronically. For more information, see Configure an e-signature provider.

  If you want to generate a certificate of completion, you must select the **Electronic Signature** as signature type in the contract request. For more information, see Activate a system property to generate a certificate of completion.

- Wet Signature: Enables signatories to sign the contract document manually. You can then upload the signed document to a contract request. For more information, see Upload a manually signed contract document.

Electronic signature workflow

- Send the finalized document to the signatories for signing.
  - The state and contract status updates to Awaiting Signature and the electronic signature flow is triggered as configured in Configure an e-signature provider.
  - An email notification that the contract document is available for signature is sent to the first signatory. The email contains a link to the contract document that the signatory can open and sign the document through the Docusign or Adobe Acrobat Sign electronic signature provider.

    The signatories will receive signature request email according to the order set in the signatories tab.

  - The signatory fields—such as Name, Title, and Email—are not pre-filled in the contract document before it is sent for signature. These fields will be populated by the electronic signature provider when the signatory access the document to sign it.
- Signatories can sign or decline the contract document.

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Signatories action on the contract document

Signatories action	Workflow
All the signatories choose to do an electronic signature	○ First signatory signs the contract document If there is more than one signatory,the contract document is sent to the next signatory in the order. The status of the current signatory in the request updates from Pending Signature to Signed. The status of the next signatory updates from Not Started to Pending Signature. ○ After the last signatory has signed the document, the contract repository record is created and the signed document is attached to it. For contract requests containing multiple contract documents, the signed contract document is split into individual documents and attached to the contract repository record for the respective contract type. The state of the requests updates to Contract Signed.
One or more signatories decide to do a wet signature	○ One or more signatories decided to do a wet signature instead of electronic signature. ○ The wet signed contract document in PDF format is shared with the contract fulfiller. ○ The contract fulfiller uploads the signed document, selects the signatories who have shared the wet signed contract document and proceeds with the signature worklow by sending the document to the next signatories. The status of the signatory in the request updates from Pending Signature to Signed. The status of the next signatory updates from Not Started to Pending Signature. The signature type is updated to Mixed signature after all the signatories have signed the document. ○ After the last signatory has signed the document, the contract repository record is automatically created and the signed document is attached to it.

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Signatories action	Workflow
	For contract requests containing multiple contract documents, the signed contract document is split into individual documents and attached to the contract repository record for the respective contract type. The state of the requests updates to Contract Signed.
The document is declined by the signatory.	An email notification that the signer has declined to sign the document is sent to the requester. The Signatory status in the request updates to Declined. The State changes to Work in progress and the Contract status changes to Signing Declined.
The signature request is not delivered to a signatory.	The Signatory status in the contract request changes to Delivery failed. The state of the contract request changes to Signature delivery failed. An email notification is sent to the contract fulfiller informing them that the signature request could not be delivered. A notification appears on the contract request informing about the undelivered signature request and the available actions for the fulfiller. ○ For Docusign, you can update the signatory's information and retry, cancel the signature process to restart it, or upload a manually signed contract. ○ For Adobe Sign, you can cancel the signature process to restart it, or upload a manually signed contract.
The contract document is resent for signature.	For contract request fulfilled by the contract user: A contract user can submit a change request. The contract fulfiller works on the change request and sends the updated document back to the contract requester. The updated contract document is sent for signature by the contract user. For contract request fulfilled by contract fulfiller: The contract fulfiller creates a document revision manually or by using

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Signatories action	Workflow
	regenerate option and resends the document for signature.

If the system property *sn_cm_core.enable_executed_contract_audit_certificate* is set to true, the certificate of completion is generated and attached to the contract repository record.

Wet signature workflow

- Send the finalized document to the signatories for signing.
  - The state and contract status are updated to Awaiting signature.
  - An email notification is sent to the first signatory in order and the contract documents are attached as PDFs in the email.

    The current signatory is placed in the To field of the email. The contract fulfiller, the person who opened the contract, the person for whom the contract was requested, and the initiator of send for signature action are placed in the CC field.
- Signatories accept or decline the document.

Signatories action on the contract document

Signatories action	Workflow
The current signatory accepts the document and there are pending signatories	○ The signatory prints the contract document,signs it, and then returns it to the signature requester. ○ On receiving the signed contract document, the contract fulfiller uploads the signed contract and sends the document to the pending signatories.
The signatory declines the document	The signatory sends the document back to the requester for necessary correction. The signatories and the contract fulfiller can collaborate and finalize the contract document.
All the signatories have signed the document	○ On receiving the contract document signed by all the signatories, contract fulfiller uploads the signed contract document in PDF format. ○ The contract document is added to the repository after it is uploaded. For self-served contracts, the state of the request updates to Closed complete and the contract status updates to Contract signed. For non-self-served contracts, the state of the request and the contract status updates

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Signatories action	Workflow
	to Contract signed. To close the contract request, select Close complete. For more information, see Upload a manually signed contract document.

Modify signatories when the signature workflow is in progress

Modify Signatories options enables you to add, remove, edit, or reorder pending signatories #while a signature workflow is in progress. Initiating this action pauses the signature workflow #for a duration defined by the system property#*maximum_signature_pause_duration*. To continue the signature workflow after making changes, use the#**Resume Signature** option to resume the workflow.

The workflow might progress as follows:

- Use **Modify signatories** option to modify the signatories.
- Add, remove, modify, or reorder signatories.

  Note:

  - For signature block-based contract templates, you can add, modify, remove, and reorder actions, whereas for participant based templates, only modify and reorder actions are enabled.
  - Modify signatories option is available in wet signature workflow and Electronic signature workflow with Docusign electronic signature provider integration.

- Select **Resume signature** to resume the signature workflow once modifications are complete.

  Note: If the signature workflow is not resumed within the configured time duration, any changes made to the signatories are reverted, and the signature workflow resumes from its previous state.

- Signature request email notifications are sent to the signatories.
- After the last signatory has signed the document, the contract repository record is created and the signed document is attached to it.

For more information, see Modify signatories and Resend signature request.

Contract document access

Access to a contract document is based on the following user roles and conditions:

- A contract fulfiller can view and update contract documents
- Only a contract administrator can delete contract documents.
- Requesters can view only the contract documents for which they submitted the contract request.
- Users added to the watch list can view only contract documents for contract requests they have added.

While generating the contract repository record, mapped fields and their values are validated for data type and correctness. If validation errors are found, an email notification is sent to the contract fulfiller. The email also displays the list of fields that haven't been copied into the final

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contract document and the link to the contract repository record. The fulfiller then opens the record using the link and corrects the values to resolve the validation errors.

Upload a manually signed contract document

Upload the wet signed contract document that you have received from the signatories. You need to upload a contract document for a wet signature workflow or if one of the signatories in the electronic workflow decides to do a wet signature.

About this task

The state of the contract request and the contract status should be Awaiting signature.

Before you begin

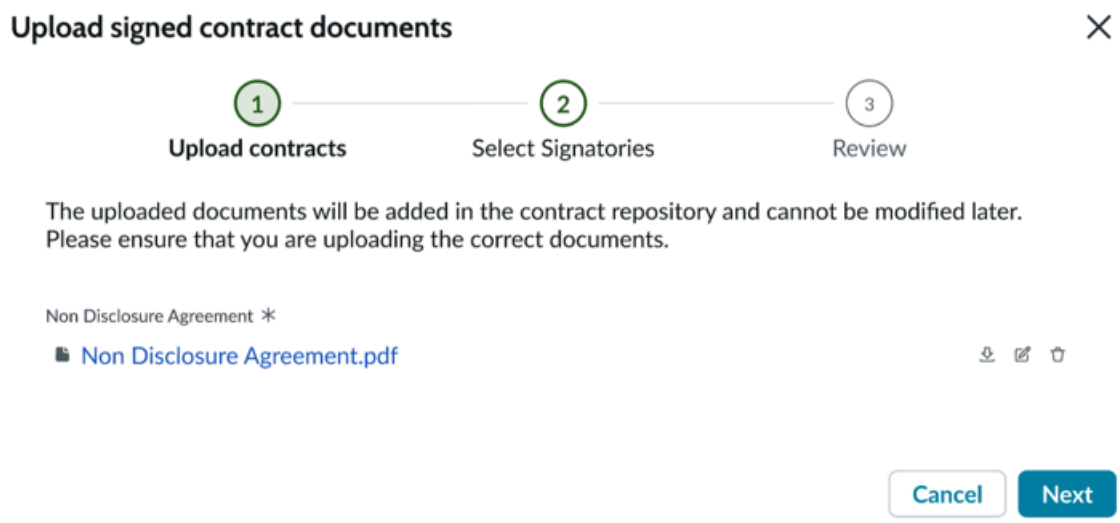
You can only upload a contract document in PDF format.

Role required: sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Select **Upload signed contract documents**.
4. Attach the wet signed contract document received from the signatories.
   a. In the Upload contracts step, select **Attach File**.
   b. Select the contract document and select **Open**.

Attach wet signed contract document for upload



   The contract document is attached.

   c. Select **Next**.
5. Select the signatories who have signed and share the contract document.

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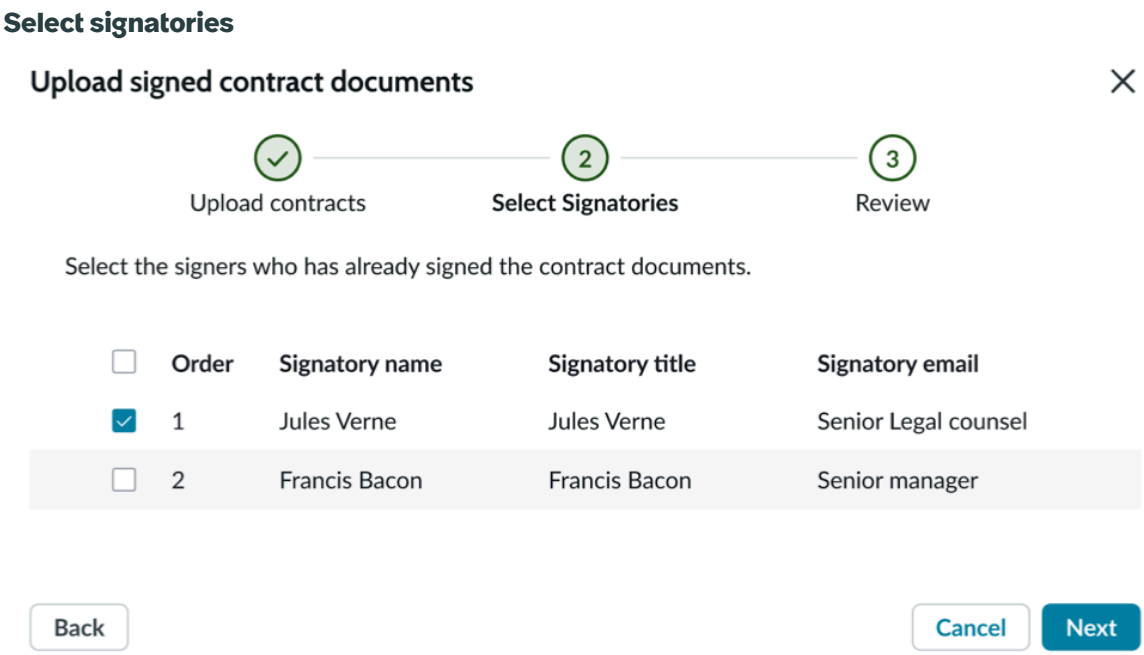
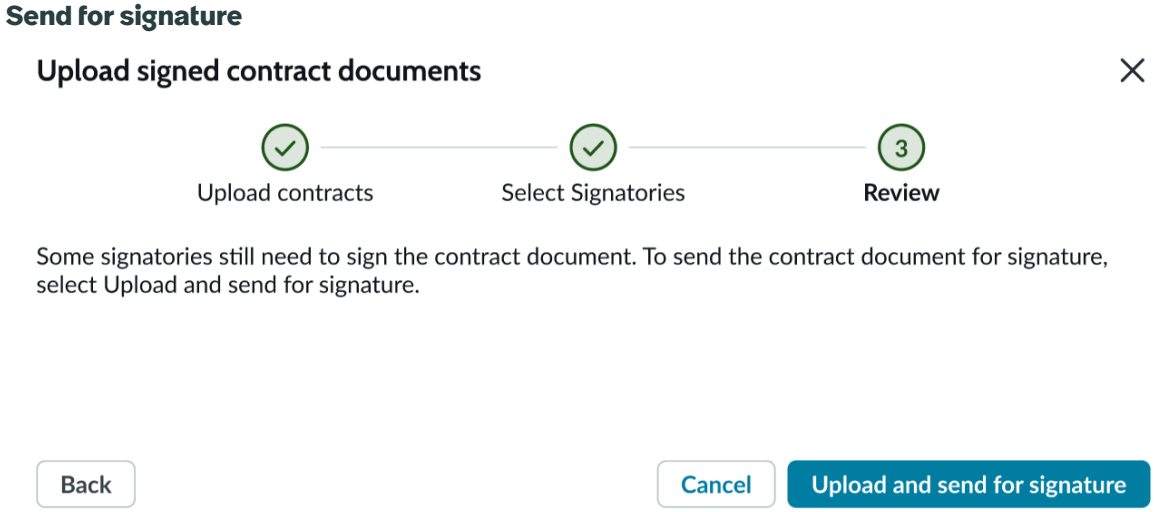
a. Select the check box for the signatories who have signed the contract document.

b. Select **Next**.



6. Review and upload the contract document.

- Upload the signed contract document - If all signatories have signed the contract document, select **Upload** to upload the document.
- Send the uploaded document to the next signatories - If some of the signatures are pending, select **Upload and send for signature** to upload and send the document to the next signatory in order.



Result

When all the signatories have the contract document, it is uploaded to the contract request. A contract repository record is created and the signed contract document is attached to it.

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An email with the attached final contract document is sent to the signatories.

For own paper contracts, the state of the request updated to **Closed complete** and the contract status updated to **Contract signed**.

For third-party contracts, the state of the request and the contract status updates to **Contract signed**. To close the contract request, select **Close complete**.

Modify signatories

Modify signatories while a signature workflow is in progress.

Before you begin

- Configure the system property *maximum_signature_pause_duration* to define the time duration for which the signature workflow is be paused after you select to modify signatories option. The minimum value that can be set is 8 hours and the maximum is 24 hours. For more information, see Configure signature pause duration when modifying signatories.
- Modify signatories option is only available for wet signature workflow and Electronic signature workflow with Docusign electronic signature provider integration.

Role required: sn_cm_core.contract_fulfiller

About this task

Use the **Modify signatories** option to pause the signature process when you want to add, modify, reorder or remove a signatory. If the signature process is not resumed within the configured time duration (as defined by the system property *maximum_signature_pause_duration*), any changes made to the signatories are automatically reverted, and the signature process resumes from its previous state.

- You can select the option to modify signatories only when the contract request is in Awaiting signature state.
- You can only remove, modify, or reorder signatories who have not yet signed the contract document.
- When the signature process is paused, signatories with pending signature task will not be able to access the contract document from the already received signature request email.
- For signature block based contract requests, you can perform add modify, remove and reorder actions.
- For participant based contract requests, you can only perform modify and reorder actions.

Procedure

1. Navigate to your workspace.
2. Open the contract request which is in Awaiting signature state.
3. Select **Modify signatories**.
   - The Contract Status updates to Signature Paused.
   - The activity stream records the modify signatories action.
4. Select **Modify** on the confirmation screen.
5. Navigate to **Signatories** tab.
6. Modify signatories.

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Action	Steps
Add signatories	**a.** Select **Add**. **b.** Select **Internal** or **External**. **c.** Fill in the details. **d.** Select **Add**. **Note:** The **Add** option is not available for self-served contract requests using contract templates with partici pant-based signatories.
Edit signatory	**a.** Select a signatory from the list by clicking on the signatory or der. Signatory details page is displayed. **b.** Modify the fields. **c.** Select **Save**.
Reorder signatories	**a.** Select **Reorder**. Reorder pop-up is displayed. **b.** For the signatory you want to reorder, select and hold the Re order icon ( ). **c.** Drag the signatory to the required order. **d.** Select **Reorder**.
Remove signatories	**a.** Select the signatory by checking the corresponding checkbox. **b.** Select **Remove**. **Note:** The **Remove** option is not available for self-served contract requests using contract templates with partici pant-based signatories.

Result
The signature process is paused and signatories modified.

What to do next
Resume the signature process after you have modified the signatories. For more information, see Resume signature process.

Resume signature process

Resume the paused signature process with the modified signatories.

Before you begin
Role required: sn_cm_core.contract_fulfiller

About this task
Use the **Resume signature** option to resume the signature process. If the signature process is not resumed within the configured time duration (as defined by the system property

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maximum_signature_pause_duration), any changes made to the signatories are automatically reverted, and the signature process resumes from its previous state.

Resume signature option is only available for wet signature workflow and electronic signature workflow with Docusign electronic signature provider integration.

Procedure

1. Navigate to your workspace.
2. Open the contract request that is in Signature paused status.
3. Select **Resume signature**.
4. Select **Resume** on the confirmation screen.

Result

- The Contract Status is updated to Awaiting signature.
- If the current signatory is different from before the pause, a notification is sent for signature request.
- The activity stream records the resume signature action.

Resend signature request

Resend signature request functionality enables contract fulfillers to manually trigger signature request when needed.

Before you begin
Role required: sn_cm_core.contract_fulfiller

Procedure

1. Navigate to your workspace.
2. Open the contract request that is in Awaiting Signature status.
3. Select **Resend signature request**.
4. Select **Resend** on the confirmation screen.

Result
Notification is resent to the current signatory.

Cancel the signature process

Cancel a wet signature process for contract documents that have been sent to signatories.

Before you begin
Role required: sn_cm_core.contract_fulfiller

About this task
The state of the contract request should be Awaiting signature.

Procedure

1. Navigate to the workspace.
2. Open the contract request.
3. On the Standard Ticket page, from the **Actions** menu, select **Cancel signature**.
4. On the confirmation window, select **Cancel signature**.

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Result
The contract status updates to Signature cancelled, and a notification email is sent to all signatories.

Cancel a contract request

Cancel a contract request if it is no longer necessary.

Before you begin
Important: Cancelling a contract request after it has been sent for signature stops the process in its current state.

Role required: sn_cm_core.contract_user, sn_cm_core.contract_admin

About this task
You can cancel a contract request when the contract request state is in Draft, New, Awaiting Approval, Awaiting signature, and Work in progress.

Procedure
1. Navigate to your workspace.
2. Open the contract request.
3. Select the More Actions icon.
4. Select **Cancel Request**.
5. Select **Cancel Request** to confirm cancellation.

Result
- The request is canceled and the associated active flows are terminated. The cancellation comments appear in the **Activity** tab of the request.
- The contract request State updates to Canceled and the contract status updates to Contract Canceled.
- The document signature sent to signatories is canceled to block further signing. The signatories get an email notification that the contract request has been canceled.

Preview and download a signed contract document

View and download a signed contract document.

Before you begin
Important: Cancelling a contract request after it has been sent for signature stops the process in its current state.

Role required: sn_cm_core.contract_user

About this task
When all signatories have signed a contract document, it's considered as the final contract document and is stored in the Contract Request Repositories [sn_cm_core_contract_request_m2m_contract_repository] table.
Access to a contract document is based on the following user roles and conditions:

- Group manager, Assigned to user and collaborator have edit access to the contract repository.
- Contract fulfiller belonging to the same assignment group has view access to the contract repository.

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- Contract fulfiller not in assignment group do not have any access to the to the contract repository.
- Only a contracts administrator can delete contract documents.
- Requesters can view only the contract documents for which they submitted the contract request.
- Users can view only contract documents for which they have been added to the watch list of the corresponding contract requests.

When multiple contract documents are attached, a separate contract repository record is created for each contract type.

Procedure

1. Navigate to your workspace.
2. Select a contract request.
3. Navigate to **Contract repository**.
4. Select the contract number.
5. Navigate to **Contract documents** tab.
6. View the contract document.

Choice	Steps
When internal storage is configured	**a.** Select the revision number. **b.** From the Attachments pane select the document to view it. **c.** Select download icon to download the document.
When external storage is configured	**a.** Select the URL. The document will open from the external storage. **b.** Select download icon to download the document.

Obligation Management

Obligation Management in Contract Management Pro enables you to track and fulfill the responsibilities specified in a contract.

With Obligation Management, a contract manager can create obligation records to define specific instructions and obligation task types required to fulfill the contract obligation. Obligation tasks are created to track and complete the activities specified in a contract, such as submitting an IT asset invoice every month.

An obligation record may have two types of obligation tasks:

Ad hoc obligation task

The obligation task may be required only once or on irregular intervals to fulfill the contract obligations.

Recurring obligation task

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The obligation task is required at regular intervals to fulfill the contract obligations. Recurring obligation tasks are automatically created based on the defined schedule.

The Obligation Management workflow starts after the signed contract is added to the contract repository record and might progress as follows:

1. A contract manager reviews the contract in the contract repository and creates obligation records for key obligations.
2. The contract manager provides the obligation details, including an obligation task schedule, in the obligation record.

   For more information, see Create obligation records.
3. Obligation tasks are created.
   - For an ad hoc schedule, the contract manager creates an obligation task from the **Obligation tasks** tab.
   - For a recurring schedule, the obligation tasks are automatically created based on the defined schedule.
4. The assigned user is notified when the obligation task is created.
5. The assigned user works on the obligation task and submits it for review.

   The state of the obligation task changes from Open to Awaiting approval.
6. The obligation fulfiller reviews the task and approves or rejects it.
   - If the obligation task is rejected, the state of the task changes to Open, and the assigned user continues to work on it.
   - If the obligation task is approved, the state of the task changes to Completed.

Create obligation records

Create obligation records for signed contracts in Obligation Management to fulfill the responsibilities specified in the contract through obligation tasks. Recurring obligation tasks are automatically created from the record. You can also add ad hoc obligation tasks that are performed only once or at irregular intervals.

About this task

Note: For more information about adding obligation tasks that are performed only once or at irregular intervals, see Create an ad hoc obligation task.

Before you begin

The contract record must be in Active state.

The group managers of the Legal Contract Owners and Obligation Fulfillers groups must also be a member of the respective group.

Role required: sn_cm_obligation.obligation_fulfiller

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Procedure

1. Open an executed contract from the your workspace.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon ( ). **c.** Select **Executed Contracts**. **d.** Select **All**. **e.** Select an active contract repository record.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open a contract request that is in Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Select an active contract repository record.

2. Select the **Obligations** tab.
3. Select **New**.

   Note: If the **New** button is not available, verify that the selected contract is active.

4. On the form, fill in the fields.
   For more information, see Obligation form.
5. Select **Save**.

Create an ad hoc obligation task

Create an obligation task required only once or at irregular intervals to track and fulfill an obligation specified in a contract.

Before you begin

The obligation and contract must be in Active state.

The schedule type in the obligation record must be **Adhoc**.

Role required: sn_cm_obligation.obligation_fulfiller

Procedure

1. Open an obligation from the workspace that you are using.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the List icon ( ). **c.** Select **Obligations**. **d.** Select **All obligations**. **e.** Select an active obligation record.

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Method	Steps
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open a contract request that is in Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Open an active contract record. **e.** Select the **Obligations** tab. **f.** Select an active obligation record.

2. Select the **Obligation tasks** tab.
3. Select **New**.
4. **Optional:** On the New obligation task page, in the **Assigned to** field, update the assigned user.
5. In the **Due date** field, select the due date for the obligation task.
6. Select **Save**.

Result
The obligation task is created and the assigned user is notified through email.

Submit obligation tasks

As an obligation user, work on obligation tasks to fulfill the obligation specified in the contract, and submit them for review.

Before you begin
Role required: sn_cm_obligation.obligation_user

Procedure
1. Open the obligation task from the email notification or Employee Center.

Options	Steps
From the email notification	Select the link in the notification email sent when an obligation task is assigned to you to access the task.
From Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the menu bar, select **My Tasks**. **c.** Select the obligation task in the **Open** tab.

2. **Optional:** In the **Attachment** field, add the required attachments.

   Note: External storage is not available for Obligation Management.

3. In the **Comments** field, add required comments.
4. Select **Submit**.

Result
The obligation task is sent for approval and the state of the task changes to Awaiting approval.

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Cancel an obligation task

Cancel an open obligation task in Obligation Management that is no longer required.

About this task

Note: Obligation tasks that are not submitted or awaiting approval are automatically canceled when you deactivate the parent obligation record.

Before you begin

The task to be cancelled must be in Open, Submitted, or Awaiting approval state.

You must be the group manager of the approver group or the approver of the obligation task.

Role required: sn_cm_obligation.obligation_fulfiller

Procedure

1. Open an obligation task from the workspace that you are using.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the List icon (). **c.** Select **Obligations**. **d.** Select **Obligation tasks**. **e.** Select the obligation task.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Select a contract request that is in Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Select an active contract record. **e.** Select the **Obligations** tab. **f.** Select the obligation task. **g.** Select the **Obligation tasks** tab and then select the obligation task.

2. Select **Cancel**.
3. In the Cancel obligation task window, add a required comment and select **OK**.

Result

The state of the obligation task changes to Canceled.

Approve or reject obligation tasks

As an obligation fulfiller, review obligation tasks in Obligation Management that have been submitted for approval, and take the appropriate action.

Before you begin

Role required: sn_cm_obligation.obligation_fulfiller

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Procedure

1. Open the obligation task from the notification email, Employee Center, or Contract Workspace.

Options	Steps
From the email notification	Select the link in the notification email sent when an obligation task is assigned to you for approval to access the obligation task.
From Employee Center	**a.** Navigate to **All** > **Self-Service** > **Employee Center**. **b.** On the menu bar, select **My Tasks**. **c.** Select the obligation task under the **Open** tab.
From Contract Workspace	**Note:** The sn_cm_workspace.contract_workspace_user role is required to access Legal Counsel Center. **a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon ( ). **c.** Select **My work**. **d.** Select **Pending approvals**. **e.** Select the obligation record that needs approval.

2. Review the obligation task and approve or reject it.

Options	Steps
From Employee Center	○ To approve the task, select **Approve**. ○ To reject the task, select **Reject**.
From Contract Workspace	**a.** In the **State** field, select Approved or Rejected. **b.** Select **Save**.

Result

If the obligation task is approved, the assigned user is notified and the state of the obligation task changes to Closed complete.
When the obligation task is rejected, the assigned user is notified and the state of the obligation task changes to Open.

Search for keywords in contract templates

Search for keywords in contract templates easily.

Before you begin

Ensure you have enabled the search functionality for the keyword search. For more information, see Enable keyword search for contract templates.

Role required: sn_cm_core.contract_config

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Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Templates**.
2. In the contract template list, select the filter icon  .
3. Search for single or multiple keywords.
   - To search for a single keyword set the filter condition to **[Keywords][are][<your-search-term>]**. For example, set filter condition as [Keywords][are][procurement]
   - To search for multiple keywords set the filter condition to **[Keywords][are]["<your-search-term1>" | "<your-search-term2>"]**. For example, set filter condition as [Keywords][are] ["procurement" | "Acme"].
4. Select **Run**.

Result
Any contract template that has the keyword is listed.

Search in Microsoft Word add-in for ServiceNow Contracts

As a contract configurator, search for templates and clauses in the Microsoft Word add-in for ServiceNow Contracts.

Before you begin
Ensure you have configured the Microsoft Word add-in for ServiceNow Contracts add-in. For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open a document where you want to mark the content controls in Microsoft Word.
2. From the Microsoft Word ribbon, select ServiceNow Contracts add-in.
3. On the add-in login screen, enter the credentials of the ServiceNow instance from where you downloaded the manifest file.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. On the **Templates** tab, search for templates with a specific name or state by entering search text in the **Search templates** search field.
   Active templates in Draft or Editing state that match the search criteria will be displayed.
5. Search for clauses that are either in the template or only in the clause library.

Location of the clause	Actions
Part of the template	**a.** Navigate to the **Templates** tab. **b.** Select a template. **c.** Go to the **Clauses** tab **d.** In the **Search clauses** field, enter the name of the clause you want to search.
Clause library	**a.** Navigate to the **Clauses** tab. **b.** In the **Search clauses** field, enter the name of the clause you want to search.

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6. Search for clause variations by name by selecting a clause with variations and entering the name of the clause variation in the **Search clause variations** search field.
   Active clauses that match the search criteria will be displayed.

Managing Contract Management Pro

As administrator work on managing the word document templates, contracts and view analytics.

Manage clauses, tables, and contract templates

As administrator manage clauses and contract templates.

Edit a contract clause variation

Edit a clause variation to modify the content that will be used in a contract template.

Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Clause Management**.
2. Select a clause.
3. In the Clause Variations related list, select the clause variation.
4. On the form Clause Variation form, edit the fields that you want to modify.
   For a description of the field values, see Clause Variation form.
5. Right-click in the form header and select **Save**.
   The imported document is parsed and the content controls extracted are listed in the Clause Variation Fields related list.
6. Select **Update**.

Result

If the updated clause variation is associated with a published contract template and new fields are available after parsing, the Unmapped meta data related list appears with the unmapped fields listing. For instructions on how to complete the template mapping, see Update contract template mappings.

Edit contract templates by manually adding content controls

Edit a contract template to reflect any modifications that must be included in the template to generate a standard contract when an employee submits a contract request.

Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template from the list.
3. On the form, modify the fields.

Word Template New Record form

Field	Description
Name	Unique name for the contract template.

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Field	Description
Table	Table to which you want to associate the contract template.
Category	Document category to which you want to associate the contract template.
Document	The document from which you want to import clauses and template field mapping. The selected document should be a Microsoft Word (.docx) document and should have valid content controllers. For more information, see Add content controls in a Microsoft Word document.
State	○ If you edit a contract template in Draft state, it will remain in Draft state. ○ If you edit a contract template in Published state, the state will change to Editing.
Application	Application to which the contract template belongs. This field is automatically set to the application scope in which you're creating the contract template.
Active	Option to make the template active and available for use.

4. Select **Parse Document** to extract any modified content marked by content control from the imported document.
   - The existing imported clauses with no change will be retained along with its Classification and Mapping clause.
   - The imported clauses for which the content controls are deleted in the imported document will be deleted from the list.
   - Any new added content controls will be listed under Imported clauses, Clause Mapping or Template Mappings.
5. Classify and map the newly added Imported clauses.
   For more information, see Classify and map imported clauses.
6. Select **Update** to save the modifications.
7. On finalizing the content of the contract document, select **Publish**.

Edit a contract template using Microsoft Word add-in for ServiceNow Contracts

Edit the metadata, signatories, or clauses in a contract template that must be included in the contract template to generate a standard contract when an employee submits a contract request using the Microsoft Word add-in for ServiceNow Contracts.

Before you begin

Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open a Microsoft Word document that contains content controls.
2. From the Microsoft Word ribbon, select ServiceNow Contracts add-in.
3. Enter the credentials of the ServiceNow instance from where you downloaded the manifest file.
4. In the Template tab, select the contract template that you want to modify.
   The associated contract template should be active and in Draft or Editing state.
5. Modify the document.

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Contract template modifications

Modification	Instructions
Modify the metadata, signatories, or clauses using the Microsoft Word add-in for ServiceNow Contracts.	Add document content controls using Microsoft Word add-in for ServiceNow Contracts
Edit or delete signatories.	Edit or delete participants using add-in
Delete content controls	Right-click the content control and select **Remove Content Control**. The content control is deleted from the Microsoft Word document. However, you must upload and parse the document for content controls to be deleted from your ServiceNow instance.

6. On finalizing the content controls, upload the document to the contract templates.
   a. Select **Proceed to select a document**.
   b. In the Select Attachment screen, select **Attach file** and select the modified document. If the file name of the document you are uploading and the one uploaded in the contract template are different, you are asked to confirm the upload.
   c. Select **Upload and parse document** to parse the content controls and add the data to the ServiceNow instance.
7. Complete clause mapping in the ServiceNow instance. For more information, see Complete clause mapping to build a clause library.
   - Unmodified existing metadata, signatories, and clauses are retained along with their details.
   - Deleted metadata, signatories, and clauses are deleted from the Template mappings, Participants, and Imported clauses related lists of the contract template.
   - Any added content controls are listed under Participants, Imported clauses, or Template Mappings.
8. Select **Update**.
9. On finalizing the content of the contract document, select **Publish**.

Edit or delete participants using add-in

As a contract configurator, edit or delete a participant from a Microsoft Word document using the Microsoft Word add-in for ServiceNow Contracts.

Before you begin

A Microsoft Word document with content controls should have been uploaded into the contract template.

Role required: sn_cm_core.contract_config and canvas_user

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Procedure

1. Open the Microsoft Word document with content controls.
2. From the Microsoft Word ribbon, select ServiceNow Contracts add-in.
3. On the add-in login screen, enter the credentials of the ServiceNow instance from where you downloaded the manifest file.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. In the **Template** tab, select the contract template.
5. Navigate to the **Signatory** tab.
6. Select the Edit or delete signatory icon (⋮).
7. Edit or delete the signatory.

Action	Steps
Edit the signatory	**a.** Select **Edit signatory**. **b.** Modify the signatory details. **c.** Select **Save**.
Delete the signatory	**a.** Select **Delete signatory**. **b.** Select **Delete** on the confirmation screen to delete the signatory.

Result
The changes made to the participants are synced to the ServiceNow instance in Participants related list.

Edit or delete table mappings in a contract template using Microsoft Word add-in

As a contract configurator, edit or delete table mappings in a contract template using the Microsoft Word add-in.

About this task
Using table mappings you can map data source tables in your ServiceNow instance to tables in a contract template. The mappings determine which records from the data source table will be added in the contract and where it will be added.

Before you begin
Role required: sn_cm_core.contract_config and canvas_user

Procedure

1. Open the contract template where you want to edit or delete the table mappings.
2. From the Microsoft Word ribbon, select ServiceNow Contracts add-in.
3. On the login screen, enter the credentials of the ServiceNow instance for which the Microsoft Word add-in is configured.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts
4. Select the **Table** tab.
5. In the list of table mappings, select the mapping or find it by entering the table name in the search bar.
6. Either modify or delete the table mapping.

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Action	Steps
Delete the table mapping	**a.** Select the menu icon ⋮. **b.** Select **Delete**. The content controls related to the table mapping are removed from the Microsoft Word document.
Modify the table mapping	**a.** Select the menu icon ⋮. **b.** Select **Edit**. For more information, see Map contract tables using the Microsoft Word add-in for ServiceNow Contracts. **Note:** When you update the fields in the **Table mapping details** section, you might need to map the table and columns again based on the following conditions: ▪ If you change the table in the **Table** field and select **Update**, all the sections in the Microsoft Word add-in screen are cleared and you must perform the mapping again. ▪ If you change the table name in the **Name** field and select **Update**, the content control of the mapped table in the Microsoft Word document is removed. You must map the table and table columns again. ▪ If you remove a column from the **Table column** field and select **Update**, the content control of the mapped table column in Microsoft Word document is removed.

Create a contract template from an existing template

Create a new contract template from an existing template if you need only a small variation in the content of an existing template.

Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open the contract template from the list.
3. Select **Create Revision**.

   Select the option **Copy** when you are creating template in Default View.

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A template revision is created with the data related to participants, imported clauses, and template mappings.

4. **Optional:** Import clauses and template field mappings from a Microsoft Word document with content controls.
   For more information, see Add content controls in a Microsoft Word document.

   a. In the **Document** field, select **Update**.

   b. Select **Choose file**.

   c. Choose a file and select **Ok**.

   d. Select **Parse document**
      - The document is parsed.
      - The metadata that was already present is retained.
      - The metadata that was present earlier but not found in the recent parsing is deleted.
      - The metadata that is new is added.
      - The clause tags that were already present are retained.
      - The clauses that were present earlier but not found in the recent parsing are deleted.
      - The clause tags that are new are added.

   A new file is uploaded to the contract template.

What to do next

- Map any new meta data found during parsing. For more information, see Update contract template mappings.
- Classify new clauses found during parsing. For more information, see Classify and map imported clauses

Generate and preview a contract document from a template

View the final form of a contract document with the content controls replaced with the values of the variables or return values of scripts.

Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template.
3. Select **Preview**.
4. In the Preview Document window, select the Lookup using list icon
5. Select a contract request from the list for which you want to generate a sample contract document.
6. Select **Generate Preview** and close the Preview document pop-up window.
7. In the **Manage Attachments** field, select **View** to view the document.

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8. **Optional:** Select the document link to download it.
9. **Optional:** Modify the contract template if you want to make any changes.

Delete a contract template

Delete contract template when you no longer need it.

Before you begin
Role required: sn_cm_core.contract_config

Procedure
1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template from the list.
3. Select **Delete**.
4. In the Confirmation pop-up, select **Delete**.

Manage contract records

As administrator manage contract records.

View a contract record

View the history of a contract request to track changes, review the audit trail, and update fields. Easily see the date a contract was modified and who modified it.

Before you begin
Role required: sn_lg_cnt.contract_fulfiller

Procedure
1. Navigate to your workspace.
2. Open the contract request.
3. View all contracts by navigating to **Contract Requests** > **All Contracts**.
4. **Optional:** View expired contracts or contracts that will expire soon.
   - To view contracts that will expire within 30 days, select **Expiring contracts**.
   - To view expired contracts, select **Expired contracts**.
5. **Optional:** View a previous version of the contract.
   a. Select the contract from the list.
   b. In the **Contract History** related list, select a date in the **Contract Starts** column to view the earlier version.

Modify a contract record

After a contract record is created, you can change the end date, parent contract, and contract model.

Before you begin
Role required: sn_lg_cnt.contract_fulfiller

About this task
If changes are made to a contract end date or its terms and conditions, a copy of the contract is automatically saved and placed in contract history.

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Procedure

1. Navigate to your workspace.
2. Open the contract request.
3. Select a contract.
4. **Optional:** Modify the contract end date.
   a. In the **End date** field, select the Show End date calendar icon ( ).
   b. In the calendar pop-up, select a date.
   c. Select **OK**.
5. **Optional:** Modify the parent contract.
   a. In the **Parent contract** field, select the Search for Record icon ( ).
   b. In the Parent contract pop-up list, select a contract record to assign as the parent contract.
6. **Optional:** Change the contract model.
   a. In the **Contract model** field, select the Search for Record icon ( ).
   b. In the Contract model pop-up list, select the model.
7. Select **Save**.

Configure fields in contract template to display correct sys_id value in contract documents

As a contract configurator, update an advanced script to print the correct display value for sys_id variables in the generated contract document.

Before you begin

Role required: sn_cm_core.contract_config

About this task

Because the script for mapping variables using the Microsoft Word add-in for ServiceNow Contracts uses the `toString()` function for the sys_id variable, its display value is not replaced properly in generated contract documents.

Procedure

1. Navigate to **All** > **Contracts Core** > **Contract Administration** > **Contract Templates**.
2. Open a contract template.
3. Navigate to the Template mapping related list.
4. Select the field for which the advanced script is enabled and the display value is not shown properly.
   Field details are displayed along with the advanced script.
5. In the script, replace the occurrences of `toString()` with `getDisplayValue()`.
6. Select **Update**.

Platform Analytics Solutions for Contract Management Pro

The Contracts Dashboard in Contract Management Pro is an analytics and reporting solution that enables you to make data-driven decisions through insights and trends derived from contract request data.

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Required roles

The following roles and tasks are associated with Contracts Dashboard:

- ServiceNow AI Platform administrator (admin): Install and activate this solution and make any necessary changes to system properties.
- Performance Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.

Activate Analytics Pack for Contract Management Pro

You can activate the Analytics Pack for Contract Management Pro plugin (com.sn_cm_pa) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a non-production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.

Review the Analytics Pack for Contract Management Pro application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

Roles and scheduled jobs items are installed with Analytics Pack for Contract Management Pro.

For more information, see Components installed with Analytics Pack for Contract Management Pro.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Analytics Pack for Contract Management Pro plugin (com.sn_cm_pa) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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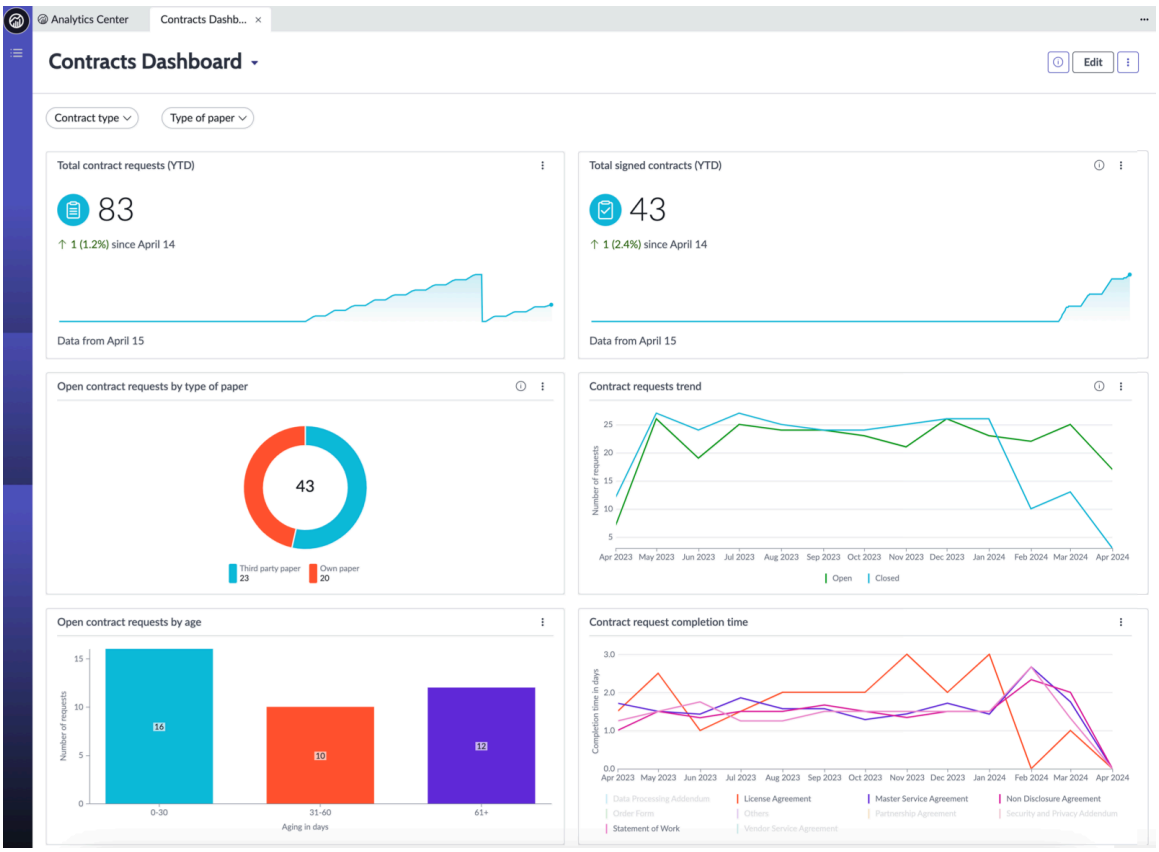
Contracts Dashboard

With Contracts Dashboard, you can make data-driven decisions by analyzing the trends and insights derived from the contract request data.

On the dashboard, you can analyze the contract request trends, compare data, and drill down into each report to view key performance indicator (KPI) details.

For more information on working with KPI details, see Examining indicators with KPI Details.

Contracts Dashboard



Required ServiceNow AI Platform roles

- Contract Report Publisher [sn_cm_core.contract_report_publisher]: Needed to edit and publish reports related to contract requests and signed contracts data.
- Contract Report Viewer [sn_cm_core.contract_report_viewer]: Needed to view reports related to contract requests and signed contracts data.
- Contract PA Admin [sn_cm_pa.pa_admin]: Needed to activate and configure the Analytics Pack for Contract Management Pro.

Access the Contracts Dashboard

To open the Contracts Dashboard, navigate to **All** > **Contracts Core** > **Contracts Dashboard**.

Using data in Contracts Dashboard

General counsels can make data-driven decisions through insights into the contract requests data with the following metrics:

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- Number of contract requests created, and contracts signed so far this year along with a comparison to the data collected during the previous run of scheduled jobs.
- Number of open contract requests by type of paper: own paper and third-party paper.
- Monthly trend of opened and closed contract requests in the last 12 months.
- Number of contract requests by age range.
- Monthly trend of completion time for various contract types in the last 12 months.

Indicators

YTD Contract request

Number of contract requests that have been created so far this year.

YTD Signed Contracts

Number of contracts that have been signed so far this year.

Average contract request completion time per contract type

Monthly trend of the average completion time of contract requests by various contract types.

Contract Request Age

Number of contract requests that have been open for the following periods: 0-30 days, 31-60 days, and 61+ days.

Breakdowns

- Contract Type
- Contract type of paper
- Contract Request Age

Reports

Reports on Contracts Dashboard

Title	Type	Source table	Description
Total contract requests (YTD)	Score 42	Contract Request [sn_cm_core_contract_request]	The number of contract requests created so far this year and the trend for contract request data. This report compares the latest data with the data collected during the previous run of scheduled jobs. It displays the following information:

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Reports on Contracts Dashboard (continued)

Title	Type	Source table	Description
			• Increase or decrease in the number of contract requests • Percentage of the increase or decrease • Date when the data was last collected
Total signed contracts (YTD)	Score 	Contract Request Repository [sn_cm_core_contract_request_m2m_contract_repository]	Number of signed contracts so far this year and the trend for signed contracts. This report compares the latest data with the data collected during the previous run of scheduled jobs. It displays the following information: • Increase or decrease in signed contract requests • Percentage of increase or decrease • Date when the data was last collected
Open contract requests by type of paper	Donut 	Contract Request [sn_cm_core_contract_request]	Real-time count of open contract requests by the type of paper: own paper and third-party paper.
Contract requests trend	Line 	Contract Request [sn_cm_core_contract_request]	Real-time monthly trend of contract requests that were opened and closed in the last 12 months. Hovering on a line displays the number of contract requests opened and closed in the month.
Open contract requests by age	Bar 	Contract Request [sn_cm_core_contract_request]	Real-time count of contract requests by age ranges.

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Reports on Contracts Dashboard (continued)

Title	Type	Source table	Description
			The age of a contract request is calculated by the request creation date and the date when you are viewing the report.
Contract request completion time	Line 	Contract Request [sn_cm_core_contract_request]	Real-time trend of the average completion time for different types of contract requests in the last 12 months. The completion time is calculated from the time the request is created to the time it is closed. Line graph in which hovering on a line displays the completion time for the related contract request type. To hide a contract request type in the graph, select its name in the legend below the graph.

Filters

Filters on Contracts Dashboard

Name	Type	Description
Contract type	Multi-select	Select one or multiple values to view relevant contract type data in the Contracts Dashboard.
Type of paper	Choice	Displays own paper and third-party paper in the list. You can select the desired option to view the relevant data in the Contracts Dashboard.

Modify assignment rule for contract requests

As a contracts configurator modify the assignment rule available in the base system for any changes required in the user or group to whom the contract request should be assigned.

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Before you begin

Role required: sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **System Policy** > **Rules** > **Assignment**.
2. Open the assignment rule Default assignment Group for CLM request
3. On the form, modify the fields.

Assignment Rule form

Field	Description
Name	Unique name of the assignment rule.
Active	Option for marking the assignment rule active. The contract request is assigned to a group or user based on active assignment rules only.
Applies To tab	
Table	Name of the table to which the assignment rule applies.
Conditions	Conditions under which the assignment rule applies. For example, to apply a rule when a contract request is submitted for Own type paper, you would enter the following condition. **[Type of paper][is][Own paper]**
Assign To tab	
User	User to whom the contract request is assigned.
Group	User group to which the contract request is assigned.

4. Click **Submit**.

Now Assist in Contract Management

Use Now Assist in Contract Management to analyze contracts for non-standard and missing clauses, and extract information from signed contracts to add in the contract repository. It also provides conversational search using natural language, enabling you to search the contract repository and perform semantic search in signed contract documents from the Now Assist panel.

None of the Advanced AI and Data Products provide legal or professional advice. The outputs provided by the Advanced AI and Data Products are for informational purposes only and are not a substitute for advice from a qualified professional. Customer assumes all responsibility and obligations with respect to any decisions, advice, conclusions, legal opinions, recommendations made or given as a result of the use of the services, including without limitation, any decision made, or action taken by Customer in reliance upon the Advanced AI and Data Products.

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Get started

Explore  Learn about generative AI skills and agentic workflows available in Now Assist in Contract Management	Configure  Activate and configure Now Assist in Contract Management
Use  Use generative AI capabilities and agentic workflows offered by Now Assist in Contract Management	Use agentic workflows  Use the agentic workflows in Now Assist in Contract Management

Important:

- Not all model providers are available for customers with in-country SKUs, and some Now Assist products/features are currently unavailable for in-country customers. For more information, see the KB1584492 article in the Now Support Knowledge Base. Be sure to check for model provider availability updates in future releases.
- Some Now Assist products/features are currently unavailable for customers in the FedRAMP, NSC DOD IL5, or Australia IRAP-Protected data centers, self-hosted customers, or in other restricted environments. For more information, see the KB0743854 article in the Now Support Knowledge Base . Be sure to check for availability updates in future releases.
- Some Now Assist products/features are currently available only for customers in some regions. Be sure to check for availability updates in future releases.
- Some AI products and skills are not available in Regulated Markets. For more information, see KB2593939: Regulated Markets AI Products/Skills Not Available. Be sure to check for availability updates in future releases.

Troubleshoot and get help

- Ask questions and explore other resources for Contract Management in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support
- KB article on computation of non-standard and missing clauses in contract analysis

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application collects all text from the submitted contract document. Customers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Explore Now Assist in Contract Management

Use AI capabilities to identify non-standard and missing clauses in a contract and locate contract insights from contract metadata and documents using natural language. With metadata extraction, automatically extract metadata from signed contracts and add it to the contract repository. Use obligation extraction to capture obligations from signed contracts and create obligation records to track and fulfill compliance requirements.

Now Assist in Contract Management overview

The following AI capabilities are available to a contract fulfiller:

- Extract the metadata from a signed contract to review and add the information to the mapped fields in the contract repository.
- Analyze the contract documents for non-standard and missing clauses by using AI-generated suggestions to minimize deviations and reduce turnaround time.
- Automatically extract obligations from a signed contract and review those obligations in the contract playbook to create obligation records in a contract record.
- Use conversational search to query the contract repository based on contract metadata and to perform semantic search in the signed contract documents from the Now Assist panel.

Skills

Contract metadata extraction

Extracts metadata from a signed contract in contract repository record and displays the information on the Document Intelligence interface.

For more information on activating the skill, see Configure Now Assist in Contract Management. For more information on extracting the metadata from a contract, see Contract metadata extraction using Now Assist in Contract Management.

Contract analysis

Reviews the contract document for non-standard and missing clauses.

For more information on activating the skill, see Configure Now Assist in Contract Management. For more information on contract analysis, see Contract analysis using Now Assist in Contract Management.

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Contract obligation extraction

Extracts obligations from a signed contract in a contract repository record and displays the extracted information in the contract playbook.

Note: Obligation extraction is available only with the manage contract repository agentic workflow.

For more information on activating the skill, see Configure Now Assist in Contract Management.

Conversational contract search and insights

Queries contract documents with conversational search using natural language and dialogue-driven queries, making it easier to find relevant information.

Conversational search enables queries based on:

- Contract metadata
- Content available in the contract document
- Combined search across metadata and contract document
- Summarization and Q&A on contract documents

Limitations:

- No support for search within scanned PDF documents
- Search functionality is limited to contracts stored in internal storage only

For more information on activating the skill, see Configure Now Assist in Contract Management.

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Now Assist in Contract Management users

Users

User	Description
Administrator [sn_cm_gen_ai.ai_contract_admin]	Provides administrative access to Now Assist in Contract Management. Installs Now Assist in Contract Management plugin, and activates the required skills.
Configurator [sn_cm_gen_ai.ai_contract_config]	Configures the use case mappings for the Now Assist in Contract Management application.
AI contract fulfiller [sn_cm_gen_ai.ai_contract_fulfiller]	Uses the Now Assist in Contract Management capabilities to analyze the contract documents for deviations and to extract the metadata from signed contracts.

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Users (continued)

User	Description
	Uses the manage contract repository agentic workflow to extract metadata and obligations automatically from signed contracts and review the extracted information in a contract playbook. Uses conversational search to query the contract repository based on contract metadata and to perform semantic search inside the signed contract documents from the Now Assist panel.

Metadata extraction workflow

The following workflow shows how different users work together to configure and extract the metadata from the contract by using the Now Assist in Contract Management application.

1. The contract AI administrator installs the Now Assist in Contract Management plugin (sn_cm_gen_ai).
2. The contract AI administrator assigns users to the roles of contract AI fulfiller and contract AI configurator.
3. The contract AI configurator configures and activates the contract metadata extraction skill in the Now Assist Admin console.
4. In the system properties, the administrator specifies whether the metadata extraction should be automatically or manually initiated.
5. When a contract repository record is created with a signed contract, a contract manager with the sn_cm_gen_ai.ai_contract_fulfiller role initiates the metadata extraction process.

   The system properties can also be configured to initiate the metadata extraction process automatically when the contract repository record is created. For more information, see Configure system properties for contract metadata extraction.
6. The contract manager receives a notification when the metadata extraction is successfully completed.

   Note: The *Metadata extraction - Completed* notification isn't active by default.
7. The contract manager selects the **Review extracted metadata** button to view the extracted information in the DocIntel viewer.
8. The contract manager submits the verified information to update it in the contract repository.
9. When the extraction process is completed, the **Extraction results** tab opens on the contract repository record and displays the status of the processed information.

Contract analysis workflow

The following sample end-to-end workflow shows how different users work together to configure and review the contract by using Now Assist in Contract Management.

1. The contract AI administrator installs the Now Assist in Contract Management.
2. The contract AI administrator assigns users to the roles of contract AI fulfiller and contract AI configurator.

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3. The contract AI configurator configures and activates the contract analysis skill in the Now Assist Admin console.
4. The contract AI configurator maps the question groups to the active clauses in the clause library, maps the questions to the expected responses, and then maps the use case to specific tables.
5. The contract AI fulfiller initiates the contract analysis by using Now Assist in Contract Management.
6. The Now Assist in Contract Management application analyzes the contract and identifies the non-standard and missing clauses.
7. The contract AI fulfiller reviews the analysis and accepts or ignores the suggested clauses.
8. The contract AI fulfiller can also add the missing clauses from the clause library.
9. The contract AI fulfiller completes the review task.

Now Assist in Contract Management benefits

Now Assist in Contract Management benefits

Benefit	Key feature	Role
Automatically extract the key metadata from signed contracts and update the contract repository, which improves accuracy and efficiency.	Metadata extraction	Contract AI fulfiller
Minimize the deviations and reduce the turnaround time by identifying non-standard and missing clauses from the contract document.	Contract analysis	Contract AI fulfiller
Automatically extract obligation from signed contracts and create obligation records in contract repository to track and fulfill the responsibilities specified in a contract.	Obligation extraction	Contract AI fulfiller
Locate contract information and insights using natural language queries across both contract metadata and signed documents. This enables quick summarization and retrieval of contract information.	Conversational search	Contract AI fulfiller

What to explore next

To learn more about configuring and using Now Assist in Contract Management, see the following topics:

- Configure Now Assist in Contract Management
- Using Now Assist in Contract Management

Configure Now Assist in Contract Management

As an AI administrator for contracts, you can configure Now Assist in Contract Management so that contract fulfillers can use the Now Assist capabilities while working on contract documents or search the contracts for information from the Now Assist panel.

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Before you begin

Ensure that the application is in Global or Now Assist in Contract Management scope.

Role required: sn_cm_gen_ai.ai_contract_admin

About this task

Use the Now Assist Admin console to configure Now Assist in Contract Management. The console contains everything that you need to configure the Now Assist skills. For more information, see Now Assist Admin console.

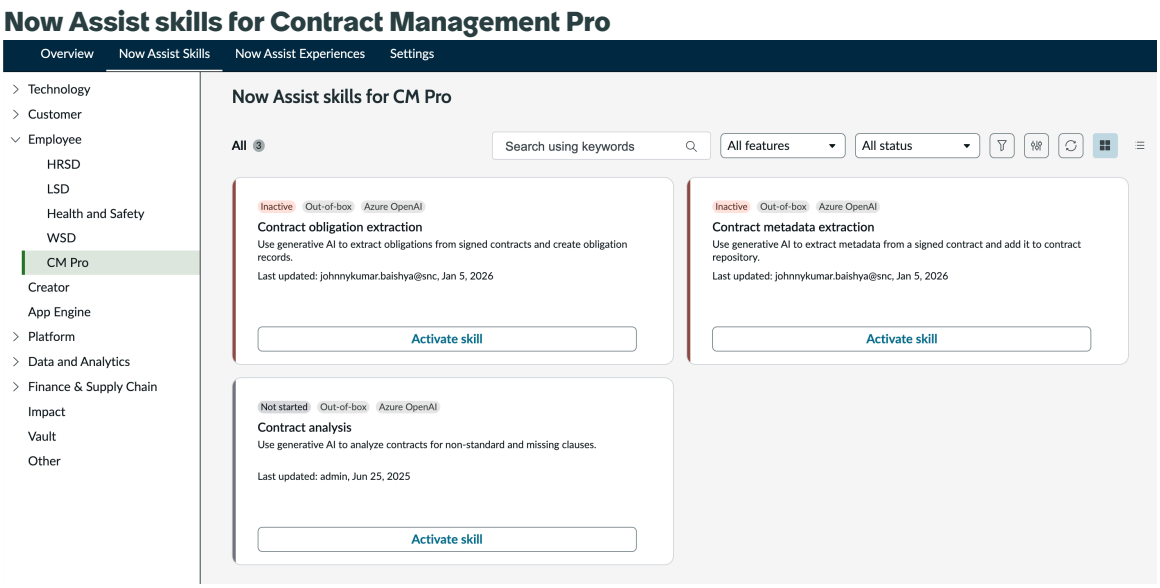
The following skills are available for Contract Management Pro in the Now Assist Admin console:

- Contract metadata extraction
- Contract obligation extraction
- Contract analysis

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Procedure

1. Install the Contract Management Pro - Prime plugin (sn_cm_ai_prime).
   For information about the plugin installation process, see Install Now Assist plugins.
2. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
3. Navigate to **Employee** > **CM Pro**.
4. Select **Activate skill** on the skill you want to activate.



5. In the skill guided setup, configure the use cases and other mappings for the skill.
   For more information on configuring contract metadata extraction, see Configuring contract metadata extraction.

   For more information on configuring contract obligation extraction, see Configuring contract obligation extraction.

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For more information on configuring contract analysis, see Configuring contract analysis.

6. In the Define access page, select the roles to specify who can access the skills.
   - If custom roles were added before upgrading to Now Assist in Contract Management Australia patch 1, they are updated automatically by a script and appear in the Define access page.
   - If custom roles were not added, the default role sn_cm_gen_ai.ai_contract_fulfiller, sn_cm_gen_ai.ai_contract_admin, and sn_cm_gen_ai.ai_contract_config automatically appear in the Define access page.
   - If new roles are created after the upgrade, add them manually in the Define access page.
7. In the Review and activate page, select **Activate**.

Result
The Now Assist skill is activated for Contract Management Pro.

You can update or deactivate the skill by selecting **Edit** and **Deactivate** the options menu icon (⋮) of the active skill. For more information, see Deactivate skills for Now Assist in Contract Management.

What to do next
Configure data permissions for Now Assist skills

Configure data permissions for Now Assist skills

Add the user roles for a Now Assist skill to specify the roles that Now Assist uses to access data while performing a task. The user roles control the information that Now Assist can read, update, or share, based on the permissions of the selected roles.

Before you begin
Role required: admin

About this task
Now Assist skills use role masking to determine the data that the roles can access.

In Contract Management Pro - Prime, the following roles are configured with the base system to provide necessary data access to the Now Assist skills.

- sn_cm_gen_ai.ai_contract_fulfiller
- sn_lg_cnt.contract_fulfiller
- sn_lg_ops.request_fulfiller
- sn_cm_core.contract_fulfiller
- contract_manager
- sn_lg_cnt.contract_owner
- sn_cm_obligation.obligation_fulfiller

You must configure the necessary roles for your workspace to ensure that Now Assist skills can access all the required information.

Procedure
1. Select the All menu and enter `sys_agent_access_role_configuration.list` in the navigation filter.
   The Agent Access Role Configurations table appears.

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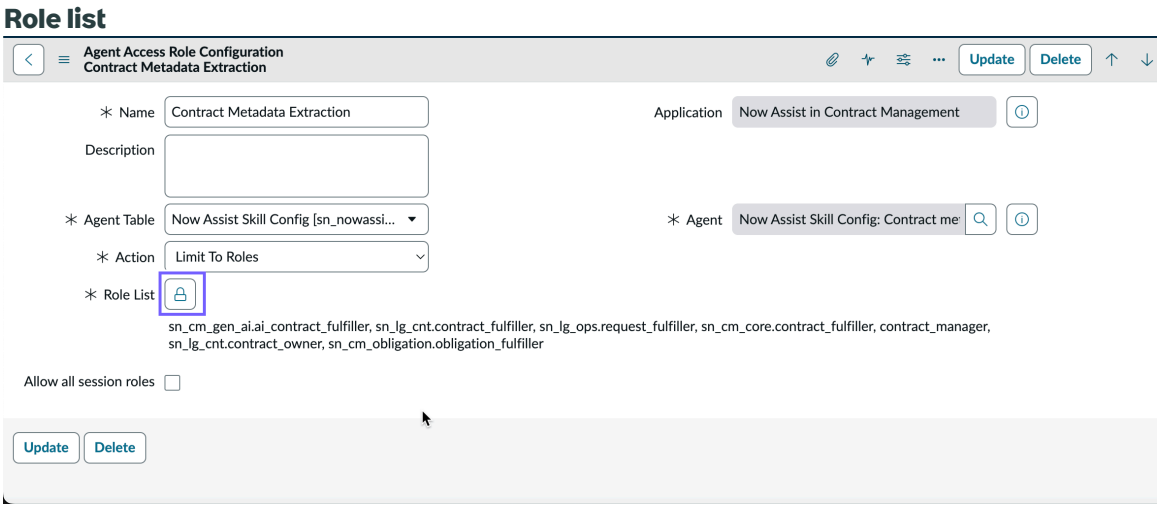
2. Open the skill that you want to configure.
3. In the **Role List** field, select the lock icon .



4. In the search field, search for the role that you want to add.
5. Select the desired role from the search results.
   The selected role is added to the **Role List** field.

Select large language models for use cases in Now Assist in Contract Management

Select a large language model (LLM) provider for a contract analysis or metadata extraction use case.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_admin

About this task

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

In Now Assist in Contract Management, you can select the LLM provider at the use case level. This selected LLM is applicable only for the use case and overrides the LLM selected at the skill level.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. On the tile of your activated skill that you want to modify, select **Edit** in the options menu (⋮).

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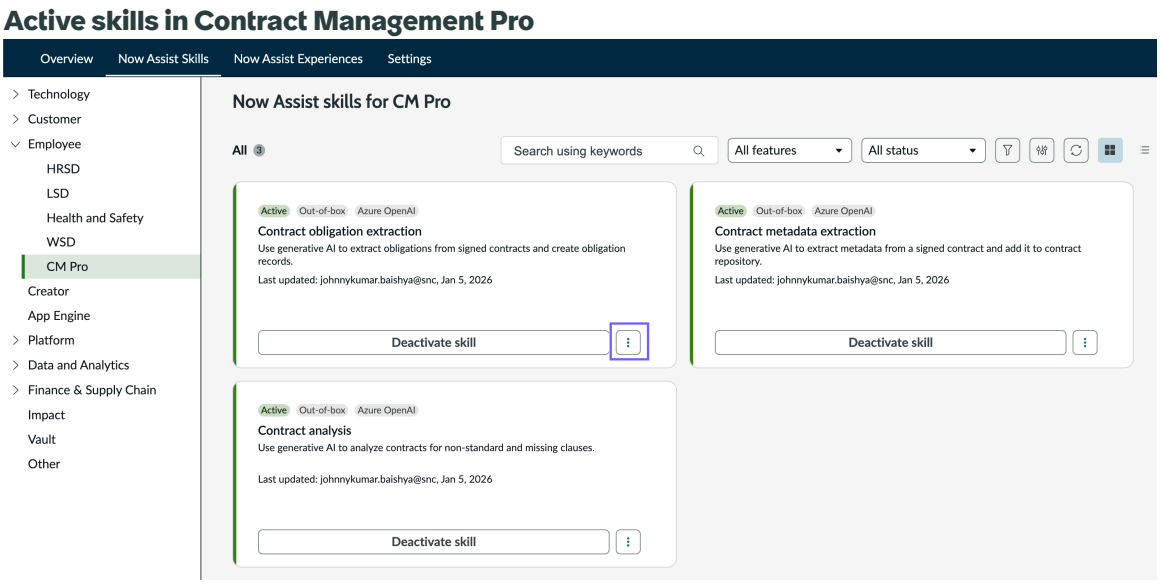
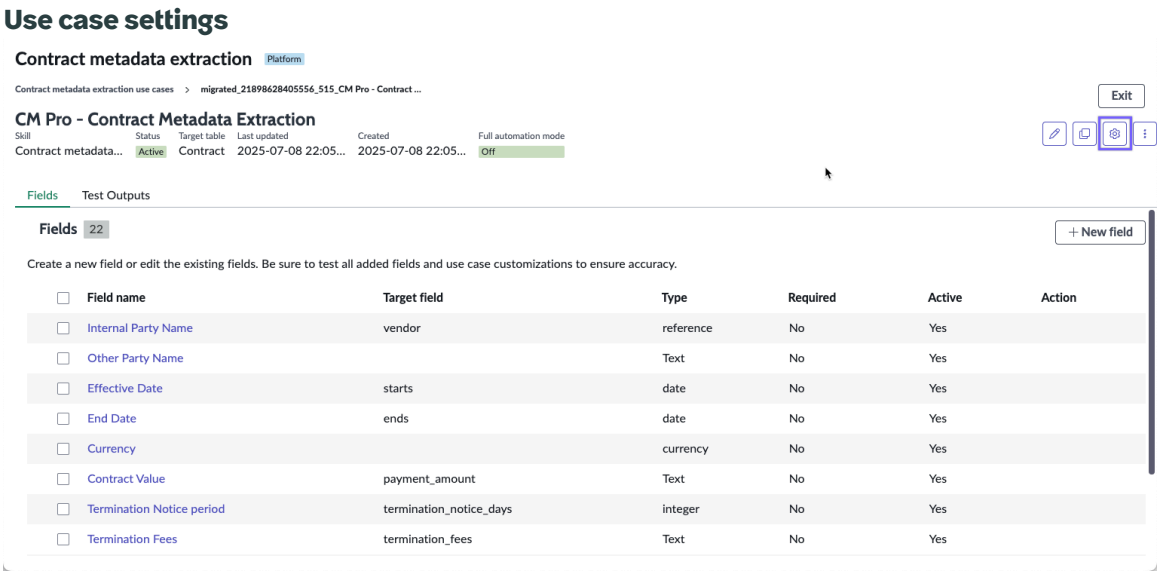


4. In the skill guided setup, select **Use cases**.
5. Open the use case for which you want to set the LLM.
6. Select the settings icon ( ).



7. In the Settings window, select **Manage LLMs**.

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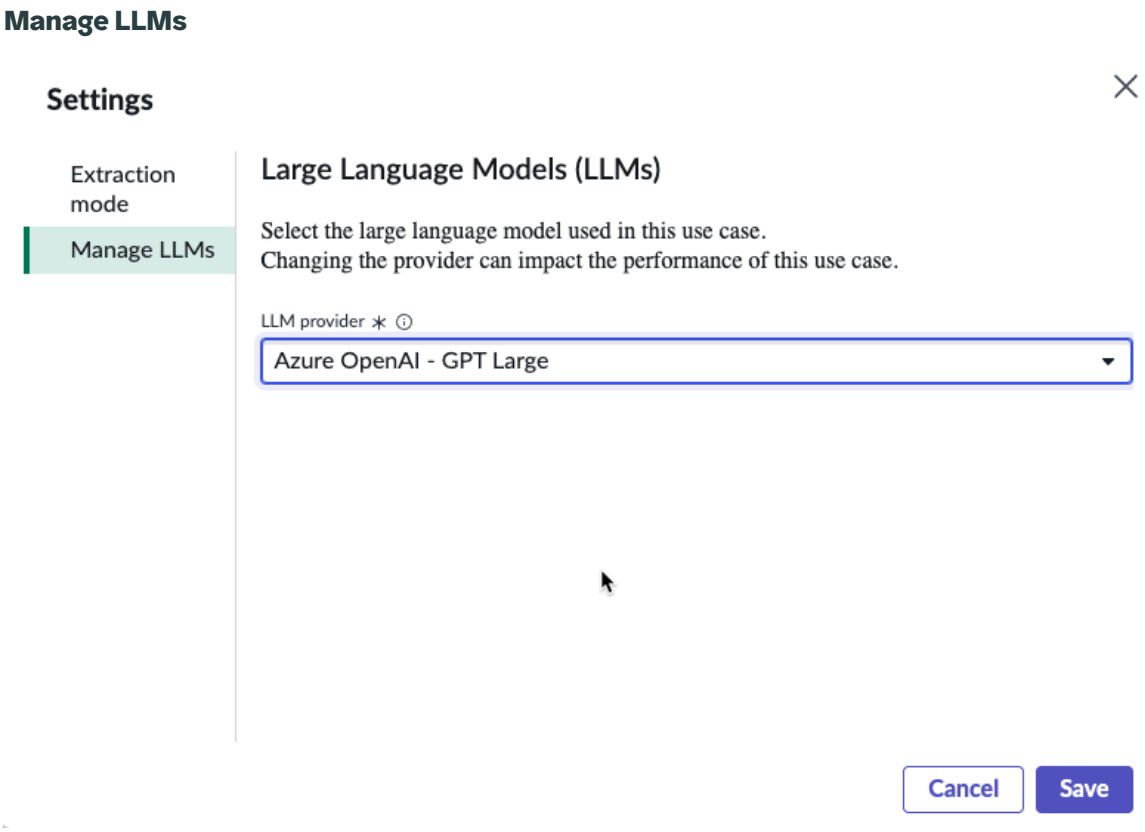

8. From the LLM provider drop-down list, select the LLM provider.
9. In the Settings window, select **Save**.
10. In the use cases page, select **Save and continue**.
11. In the Review and activate page, select **Done**.

Result

The LLM provider is set for the use case and is used for contract analysis or metadata extraction where this use case is applicable.

Related topics

- Configure Now Assist in Contract Management
- Create use cases for contract metadata extraction
- Create use cases for contract analysis

Configuring contract metadata extraction

Configure system properties and use cases for metadata extraction so that a contract manager can use Now Assist to extract metadata from a contract and add the extracted information to the contract repository.

Create use cases for contract metadata extraction

Create a use case for contract metadata extraction to define the information that you want Now Assist to detect in a document.

About this task

The following video walks you through the process of creating use cases for the contract metadata extraction skill.

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https://player.vimeo.com/video/1152225208?h=01e70b72af&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

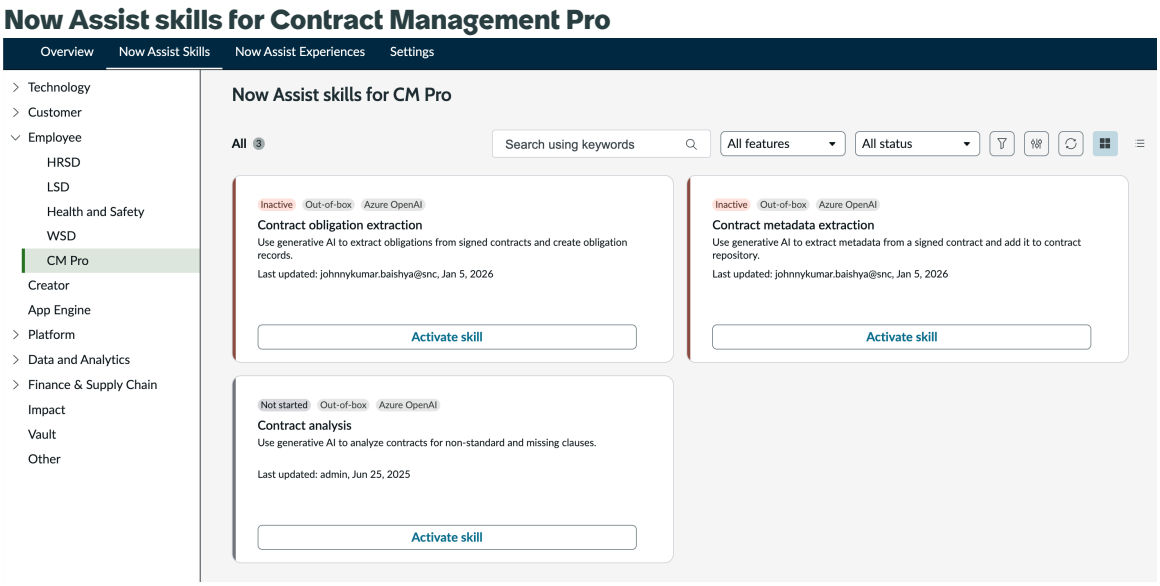
About this task

The CM Pro - Contract Metadata Extraction use case is available with the base system. This use case is not editable. For more information about the various fields in the CM Pro - Contract Metadata Extraction use case, see Contract metadata extraction use cases.

Note: If you create your own use case or customize a copy of an available use case, be sure to test it thoroughly to ensure accuracy.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.



4. On the General details page, view the skill details and select **Save and continue**.
5. In the Contract metadata extraction use cases page, select **New use case**.
6. In the Define use case page, add the use case details and select **Save and continue**.

Define use case form

Field	Description
Use case name	Unique name of the use case.
Target table	Table where extracted information is stored.
Language of the files	Language of the contract documents from which you want to extract the metadata.

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Field	Description
	For more information on supported languages, see Languages supported by Document Intelligence.
LLM provider	Large language model (LLM) provider for the use case that is used to extract metadata. **Note:** For contract metadata extraction use cases, select large LLMs such as Now LLM Service Large to ensure more accurate results.
Image mode	Improves the efficiency of processing images for third-party multi-modal LLMs like Google Gemini, Azure OpenAI. The field is available only when a third-party multi-modal LLM is selected in the **LLM provider** field. **Note:** Selecting image mode reduces the page count limit to 10 pages per file.
Document intelligence skill	Displays the skill name for which you're creating the use case.

7. In the Define fields page, select **Add a field** to add fields for the use case.

   a. In the New field window, select **Field**.

   b. Enter details for the new field.
   For more information on the field form, see Field form for use case setup.

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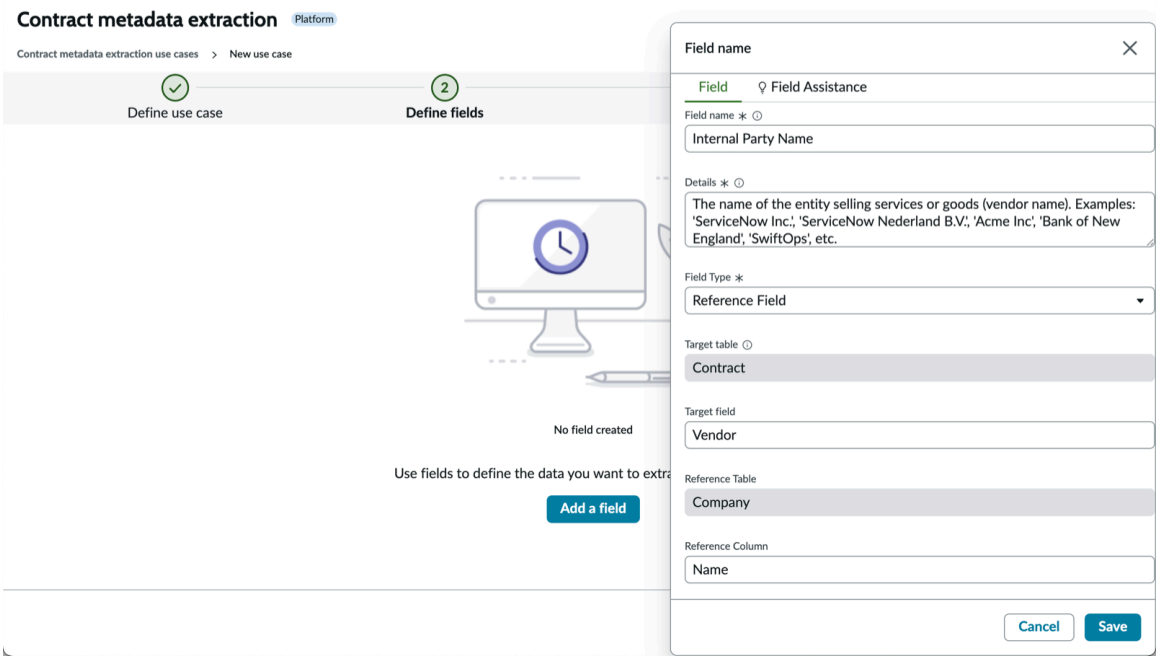
Field page for contract metadata extraction



c. Select **Save**.

Note: After adding fields, be sure to test them thoroughly to ensure accuracy.

8. Select **Save and Continue**.
9. **Optional:** Upload a document to test how the contract metadata extraction skill works with the new use case.

   a. Select **Test a new document**.

   b. Upload a document from a record or from the device.
   You can test documents that are in .pdf format.

   c. Select **Continue**.
   The metadata extraction results for the uploaded document is displayed on the side panel.

   (Optional) Upload and test another document by selecting **Test a new document**.

   d. **Optional:** Add new fields or update the existing fields by selecting **Back**.

   e. Select **Save and continue** to proceed.

10. Select **Complete setup**.

Result

The use case is created for the Contract metadata extraction skill. Now Assist uses the use case to extract metadata from signed contract.

What to do next

Map a use case for contract metadata extraction

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Related topics

- Contract metadata extraction use cases
- Select large language models for use cases in Now Assist in Contract Management

Contract metadata extraction use cases

In contract metadata extraction, use cases specify the information that you want Now Assist to detect in a document.

The CM Pro-Contract Metadata Extraction use case is available with the Contract Management Pro - Prime base system. This use case is not editable.

Note: If you create your own use case or customize a copy of an available use case, be sure to test it thoroughly to verify accuracy.

The following fields are configured in the CM Pro-Contract Metadata Extraction use case for metadata extraction.

Contract metadata extraction fields

Field	Description	Default Target Field
Other party name	The name of the company selling services or goods.	None
Internal party name	The name of the company buying services or goods.	vendor
Effective date	The date from which the contract becomes effective.	starts
End date	The date when the contract is set to expire.	ends
Contract number	A unique identifier for the contract.	vendor_contract
Payment terms	The conditions under which payments are to be made.	invoice_payment_terms
Governing law	The jurisdiction under which the contract will be governed.	governing_law
Contract duration	The duration for which a contract is valid.	contract_duration
Currency	The currency in which the contract is denominated.	None
Contract value	The total value of the contract.	payment_amount
Termination notice period	The notice period required to inform the other party prior to contract termination.	termination_notice_days
Termination fees	The fees payable if the contract is explicitly terminated for convenience and the contract mentions that such termination includes a payment.	termination_fees

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Contract metadata extraction fields (continued)

Field	Description	Default Target Field
Payment frequency	The time interval for making a payment or generating invoice.	payment_schedule
Late payment fees	The fees payable for late payment.	late_payment_fees
Most favored nation available	Availability of clause that covers the most favored nations in the contract document.	most_favorite_nation_applicable
Renewal limit	The maximum percentage increase allowed on a contract's fee during an annual automatic renewal.	renewal_cap
Liability limit	The maximum amount that a party is obligated to pay in the event of a claim, loss, or breach under a contract.	liability_cap
Includes affiliates	Availability of clause that specifies whether the terms and conditions also extend to the affiliated companies (in other words, Entities controlled by, controlling, or under common control with a party) of the primary contracting party.	affiliates_included
Termination for convenience applicable	Availability of clause that indicates whether a party has the right to end a contract at any time, without reason.	termination_for_convience_rights
Publicity restriction applicable	Availability of clause that restricts either party from publicly disclosing the existence, terms, or details of the agreement without prior written consent.	is_publicity_restricted
Termination for cause	The clause that specifies the reason for termination of contract by a party if the other party fails to meet key obligations.	termination_for_cause
Force Majeure applicable	Availability of clause that protects parties from liability if they are unable to meet obligations due to extraordinary events beyond their control.	is_force_majeure_applicable
Renewal notice period	The notice period to renew a contract.	renewal_notice_period
Renewal termination notice period	The notice period to terminate the renewal of a contract.	termination_notice_period

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Contract metadata extraction fields (continued)

Field	Description	Default Target Field
Auto renewal clause available	Availability of clause that indicates if the contract renews by default unless someone takes an action to terminate it.	has_auto_renewal_clause

Map a use case for contract metadata extraction

Map a use case to specific tables, and define conditions to apply the use case for metadata extraction.

About this task

The following video walks you through the process of mapping use cases for the contract metadata extraction skill.

https://player.vimeo.com/video/1152229371?h=df89dfd3fc&badge=0&autopause=0&player_id=0&app_id=58479

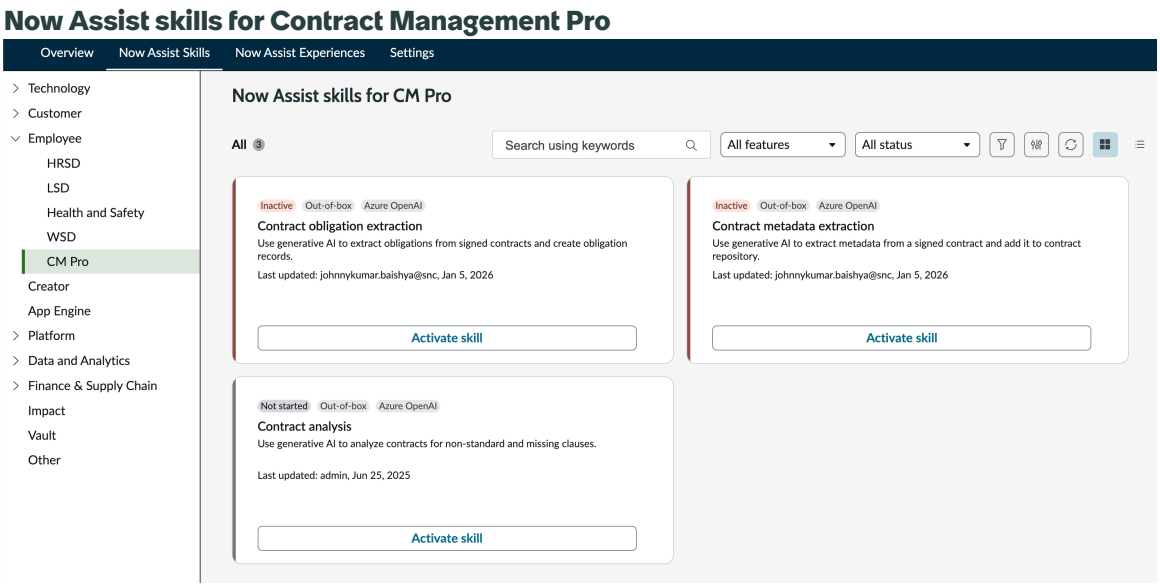
Before you begin

Ensure that the application is in the Global or Now Assist in Contract Management scope. If you are configuring the use case mapping in a different application scope, add the scoped ACL to the Use Case Mapping table (sn_cm_gen_ai_usecase_configuration).

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.



4. In the General details page, view the skill details and select **Save and continue**.
5. In the Use case page, select **Save and continue**.

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For more information on creating a use case, see Create use cases for contract metadata extraction.

6. In the Use case mappings page, select **New**.
7. On the Create new use case mapping form, fill in the fields.
   For a description of the field values, see Contract metadata extraction use case mapping form.
8. Select **Save**.

Result

The use case is mapped to specific tables and conditions, and it is applied for metadata extraction when the conditions are met.

Related topics

Create use cases for contract metadata extraction

Contract metadata extraction use case mapping form

Use the Create use case mapping form in the contract metadata extraction skill to map the use case to specific tables and conditions.

Create Use Case mapping form

Field	Description
Name	Unique name of the use case mapping.
Use case	The use case used to extract metadata from a signed contract. **Note:** Only active use cases for Contract metadata extraction are displayed in the list. The **CM Pro - Contract Metadata Extraction** use case is available with the Now Assist in Contract Management base system.
Contract repository table	The contract repository table where the contract records are created. The extracted metadata will be added in this table.
Order	Order in which the use case will apply. If multiple use cases meet the same conditions, the use case with the lowest order number is applied first.
Contracts created from contract request	Option to apply the use case to contracts initiated from a contract request.When the check box is cleared, the use case applies to contracts that are directly uploaded on a contract record, without a contract request. The check box is selected by default. **Note:** The check box appears only when the Now Assist in Contract Management (sn_cm_gen_ai) and Contracts core (sn_cm_core) plugins are installed.
Contract type	The contract type for which the use case will apply.

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Create Use Case mapping form (continued)

Field	Description
	Note: Only active contract types are displayed in the list. This field appears only when the **Contracts created from contract request** check box is selected.
Request table	The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure the use case mapping on a different table. This field appears only when the **Contracts created from contract request** check box is selected.
Request conditions	Conditions under which the use case applies on the request table. The field appears only when the **Contracts created from contract request** check box and the request table are selected. For more information on using the condition builder, see Create a condition statement using the condition builder.
Repository conditions	Conditions under which the use case applies on the repository table. The field appears only when a table is selected in the **Contract repository table** field. For more information on using the condition builder, see Create a condition statement using the condition builder.

Configure system properties for contract metadata extraction

Configure system properties to specify whether the contract metadata extraction should be automatically initiated or manually.

About this task

The sn_cm_gen_ai.cmpro_initiate_metadata_extraction system property defines how the contract metadata extraction process is initiated on a contract repository record. By default, the system property is set to initiate the contract metadata extraction process manually.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_admin

Procedure

1. Navigate to the **All** menu and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.

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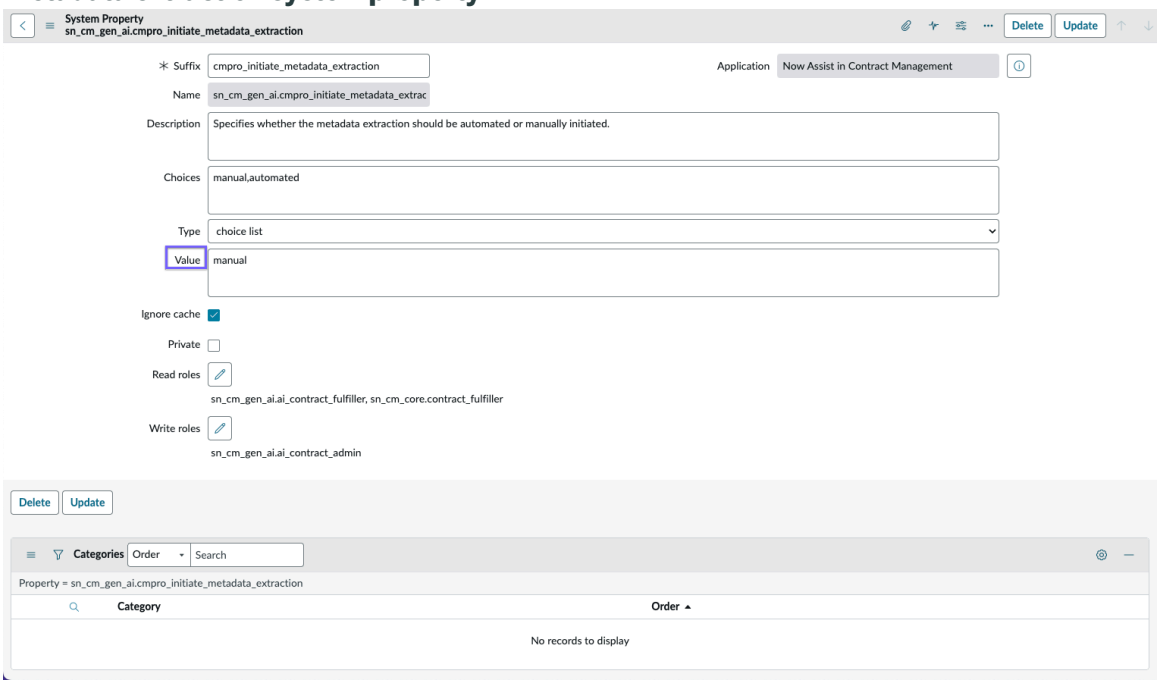
2. In the **Name** column, search for `sn_cm_gen_ai.cmpro_initiate_metadata_extraction`.
3. Select the *`sn_cm_gen_ai.cmpro_initiate_metadata_extraction`* property.
4. Update the **Value** field.
   - To set manual initiation of the metadata extraction process, enter `manual`.
   - To set automatic initiation of the metadata extraction process, enter `automated`.

   The default value is **manual**.

Metadata extraction system property



5. Select **Update**.

Result

The initiation method for metadata extraction is configured.

- If set to manual, the **Initiate metadata extraction** button appears in the contract repository record, enabling you to initiate the metadata extraction process from that record.
- If set to automatic, the metadata extraction automatically initiates once the contract repository record is created.

Related topics

Initiate metadata extraction from a contract

Enable notification for contract metadata extraction

Enable the notification for contract metadata extraction to receive email notifications when metadata extraction is completed.

About this task

The *`Metadata extraction - Completed`* notification is not active by default.

Before you begin

Role required: admin

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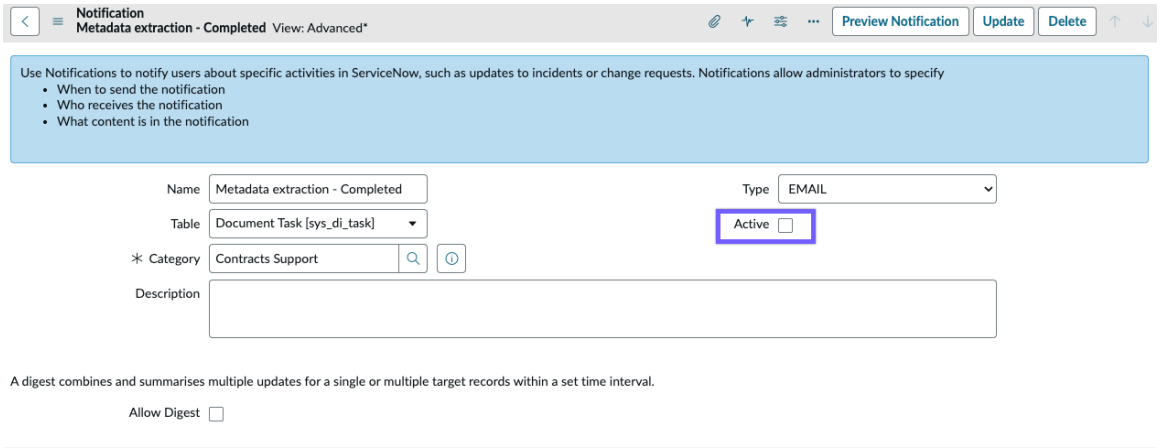
Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the **Name** column, search for `metadata`.
3. Select *`Metadata extraction - Completed`*.
4. On the Notification form, select the **Active** check box.

Metadata extraction email notification



5. Select **Update**.

Result

The metadata extraction email notification is activated and triggers when the metadata extraction process is completed.

What to do next

Configure the workspace URL for contract metadata extraction notifications

Configure the workspace URL for contract metadata extraction notifications

Configure an extension point to update the workspace URL in email notifications, so that users can navigate to the correct workspace and view the extracted metadata.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, search for `sn_cm_gen_ai.PopulateUrlForMetadataExtractionRequestRecordEXT`.
3. Select the record.
4. Select the **Create implementation** related link.
5. On the Script Include form, fill in the fields.

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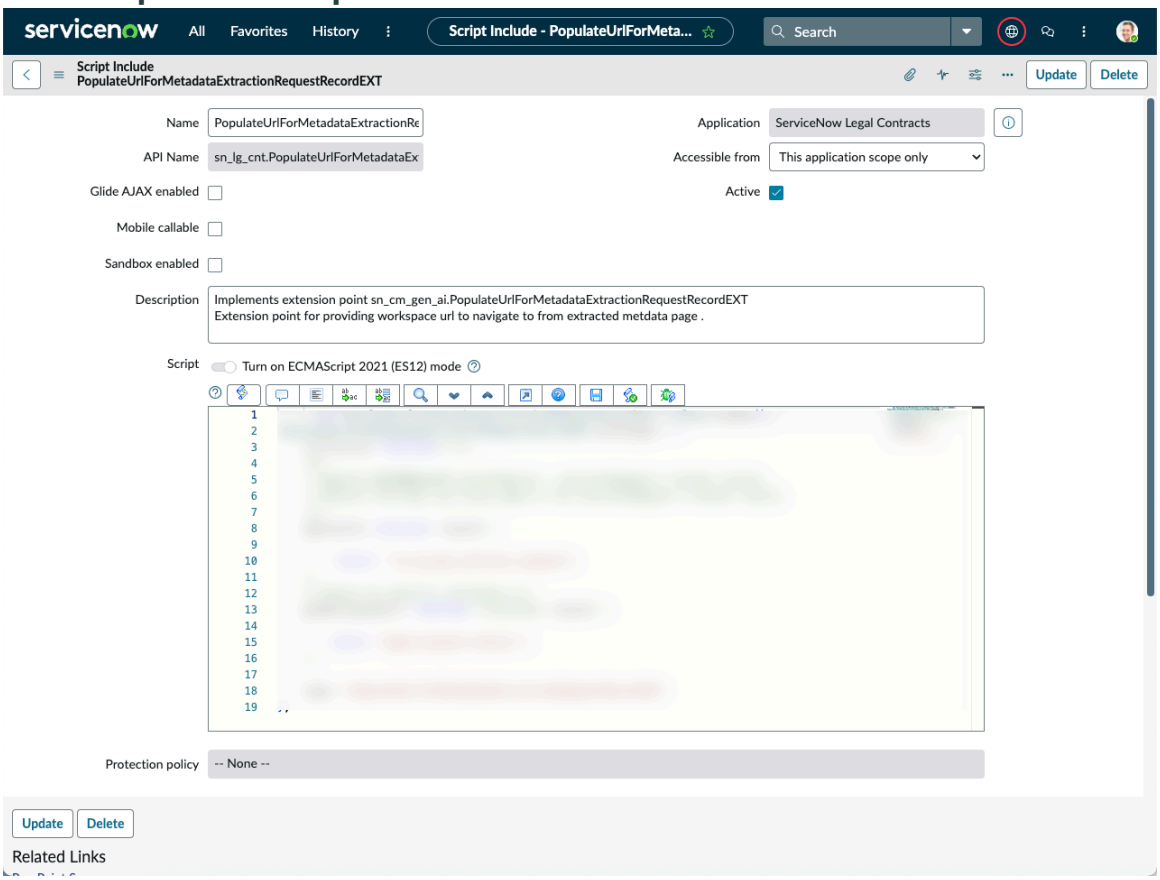
Extension point for workspace URL



For a description of the field values, see Scripted Extension Point form fields.

6. In the **Script** field, update the script to define the parent record's table and specify the workspace URL to be included in the email notifications.
   - In the `appliesTo` function, add the table name of the parent record.
   - In the `getWorkspaceUrl` function, add the workspace URL.
7. Select **Update**.

Result

The configured workspace URL appears in the metadata extraction email notification.

For more information on enabling the notification for contract metadata extraction, see Enable notification for contract metadata extraction.

Configure an extension point to add contract metadata

Update the script in an extension point to specify fields in a related contract repository table where you want to add the extracted information for unmapped fields of a metadata extraction use case.

Before you begin

Role required: admin

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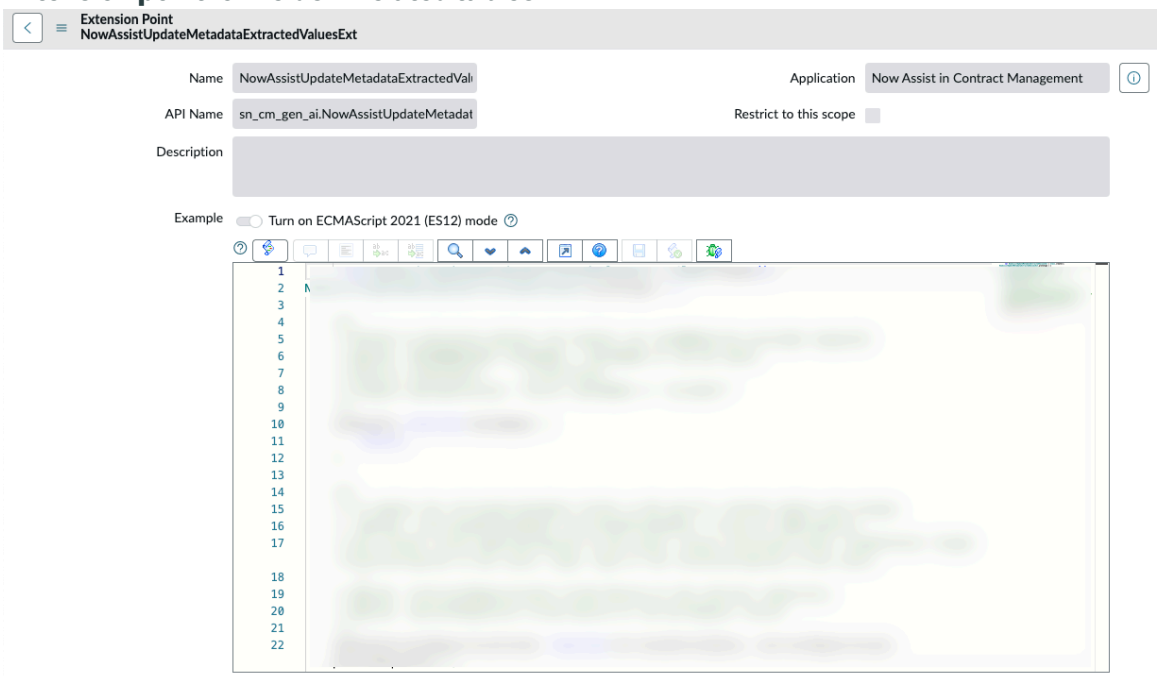
Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** field, search for `sn_cm_gen_ai.NowAssistUpdateMetadataExtractedValuesExt`.
3. Select the record.
4. Select the **Create implementation** related link.
5. On the Script Include form, fill in the fields.

Extension point for fields in related tables



For a description of the field values, see Scripted Extension Point form fields.

6. In the **Script** field, update the script to specify the contract repository related table and the field mapping
   - In the `canHandle` function, add the request table name where you want to update the extracted information.
   - In the `updateContractRepositoryFields` function, add a script to update the fields. The extracted metadata will be fetched from the `retrievedFieldsData` parameter.
7. Select **Update**.

Result

The script specifies the related contract repository tables and their field mappings. After metadata extraction, values from these fields are added according to the defined mapping.

For more information on metadata extraction use case mapping, see Map a use case for contract metadata extraction.

Configuring contract analysis

Configure use cases with associated field groups and fields, and map them to clauses and expected responses. Now Assist uses the applicable use case to analyze a contract document and identify non-standard and missing clauses.

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Create use cases for contract analysis

Create a use case for contract analysis that is used by Now Assist to identify non-standard and missing clauses in a contract document.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

About this task

The contract analysis use case contains field groups and their associated fields.

Field groups represent the clauses that are used in the contract document. Field groups are linked to clause variations of a clause library. Now Assist uses the mapped clause content to display suggestions for missing or non-standard clause.

Fields are the prompt questions added for a field group. Fields are mapped to an expected response. Now Assist executes these fields (prompt questions) on a contract document to identify the non-standard clauses.

When creating a use case, add a field group, and then define the fields within that field group to ensure that the fields are linked to the field group.

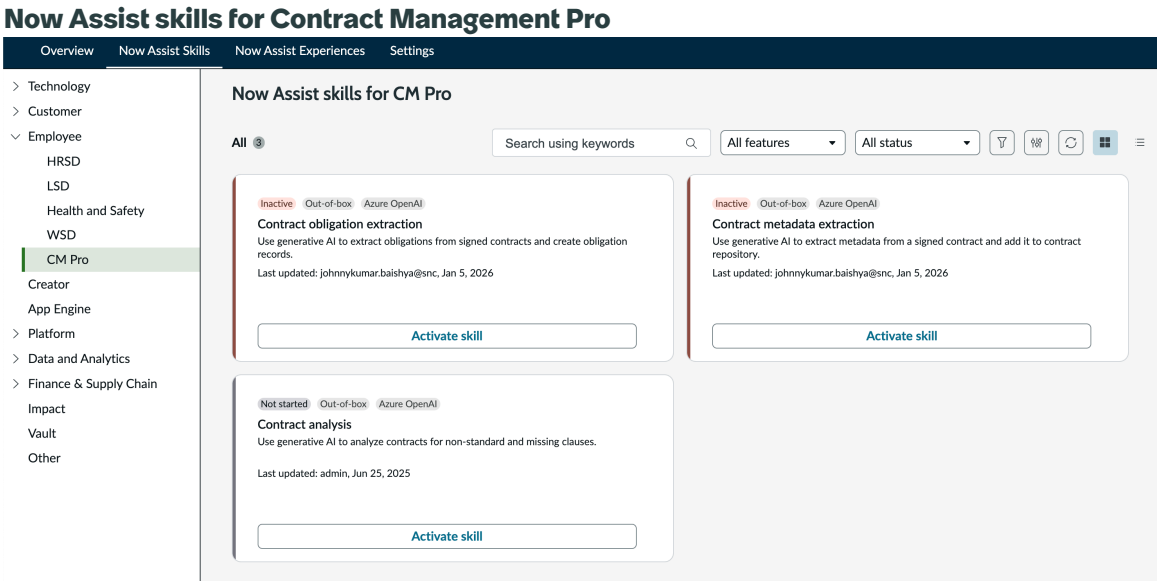
The CM Pro - Contract Analysis use case is available in the base system. This use case is not editable.

Note: If you create your own use case or customize a copy of an available use case, be sure to test it thoroughly to ensure accuracy.

For more information on the computation of non-standard and missing clauses, see the KB1704731 article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.



4. In the General details page, view the skill details and select **Save and continue**.

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5. In the Q&A use cases page, select **New use case**.
6. In the Define use case page, add the use case details and select **Save and continue**.

Define use case form

Field	Description
Use case name	Unique name of the use case.
Target table	This field should be left empty.
Language of the files	Language of the contract documents this is by Now Assist. For more information on supported languages, see Languages supported by Document Intelligence.
LLM provider	Large language model (LLM) provider for the use case that is used to analyze contracts. **Note:** For contract analysis use cases, select large LLMs such as Now LLM Service Large to ensure more accurate results.
Image mode	Improves the efficiency of processing images for third-party multi-modal LLMs like Google Gemini, Azure OpenAI. The field is available only when a third-party multi-modal LLM is selected in the **LLM provider** field. **Note:** Selecting image mode reduces the page count limit to 10 pages per file.
Document intelligence skill	Displays the skill name for which you're creating the use case.

7. In the Define fields page, select **Add a field** to add fields for the use case.

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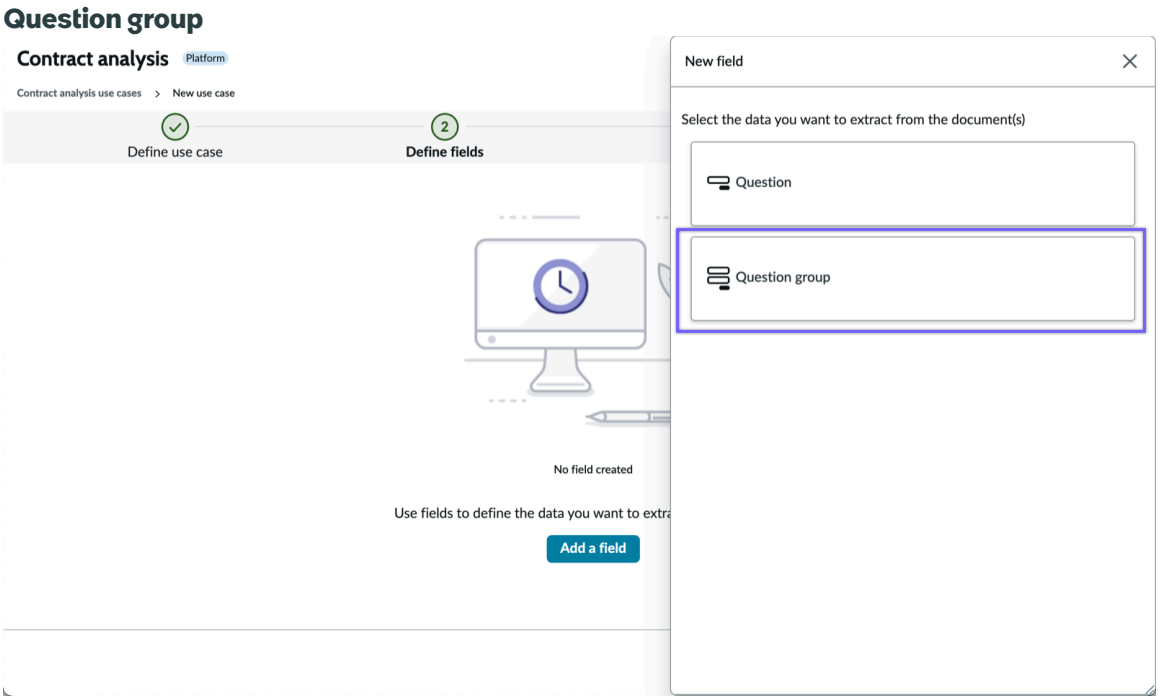
a. In the New field window, select **Question group**.



Note: Add a question group, and then define the questions within that question group to ensure that questions are linked to a question group.

b. On the form, fill in the fields.

Field groups form

Question group	Description
Field group name	Unique name of the question group that will be mapped to a clause variation using clause mappings. For example, `Purpose`, `Term`, and so on.
Additional details	More information on the field group.
Target table	This field should be left empty.

c. Select **Add questions**.

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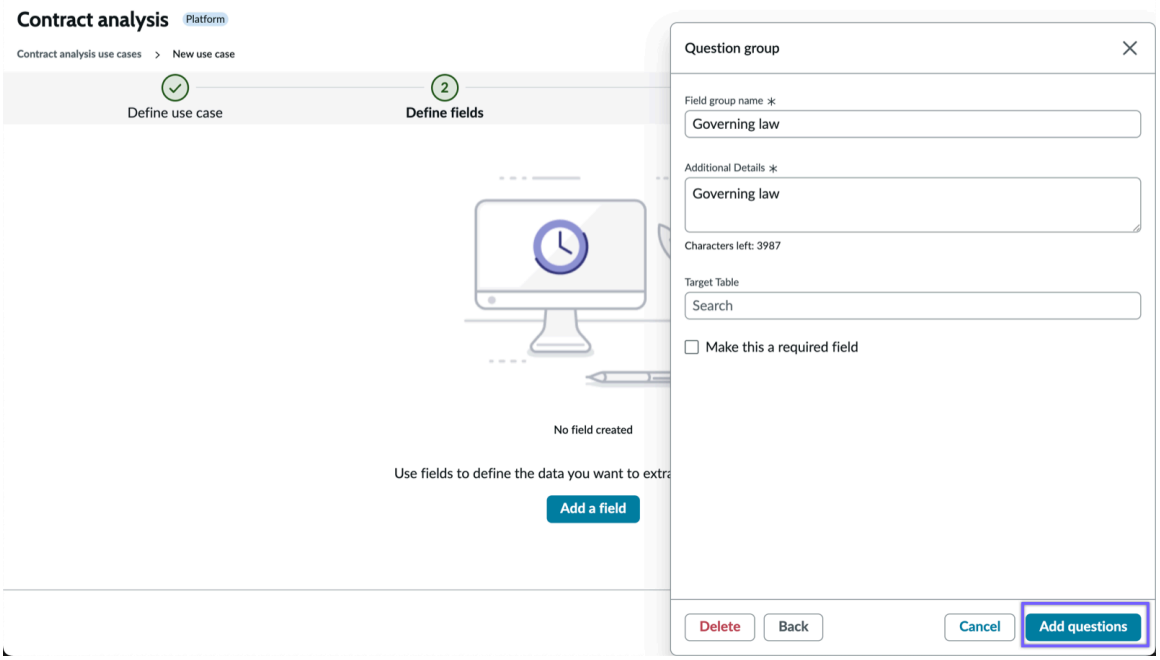
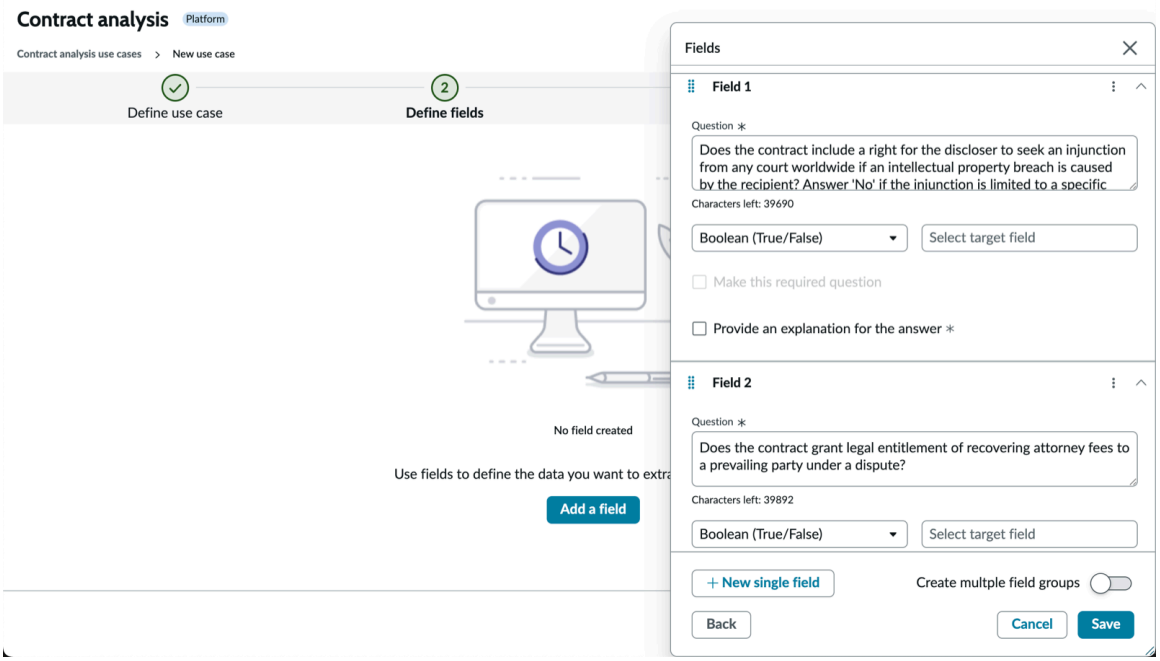
Question group page



d. Enter details for the field.
For more information on the field form, see Question form for use case setup.

Fields page



e. Select **Save**.

Note: After adding question groups and questions, be sure to test them thoroughly to ensure accuracy.

8. Select **Save and continue**.
9. **Optional:** Upload a document to test how the contract analysis skill works with the new use case.

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a. Select **Test a new document**.

b. Upload a document from a record or from the device.
You can test documents in .pdf or .docx format.

c. Select **Continue**.
The contract analysis results for the uploaded document is displayed on the side panel.

(Optional) To upload and test another document, select **Test a new document**.

d. **Optional:** Add new fields or update the existing fields by selecting **Back**.

e. Proceed by selecting **Save and continue**.

10. In the Review and activate page, select **Complete setup**.

Result
The use case for Contract analysis skill is created.

What to do next
Map a field group to a clause

Related topics
Select large language models for use cases in Now Assist in Contract Management

Map a field group to a clause

Map field groups of a use case to clauses of a clause library. Now Assist uses the mapped clause content to display suggestions for a missing or non-standard clause.

Before you begin
Ensure that you have active clauses in the clause library.

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.

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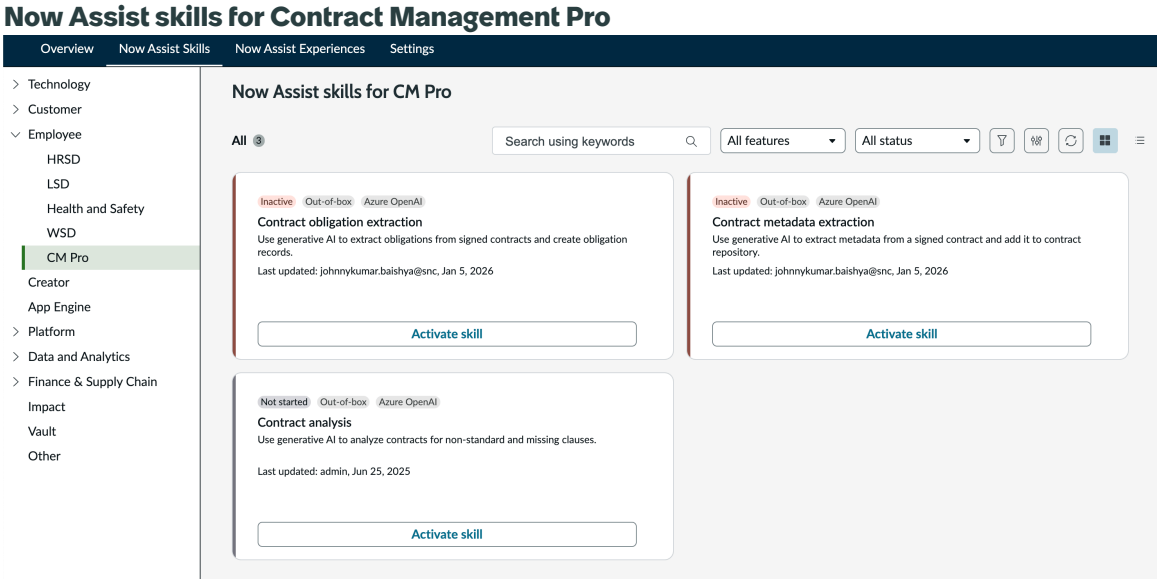

4. In the General details page, view the skill details and select **Save and continue**.
5. In the Use case page, select **Save and continue**.
   For more information on creating a use case, see Create use cases for contract analysis.
6. In the Clause mappings page, select **New clause mapping**.
7. On the form, fill in the fields.

Clause Mapping form

Field	Description
Use case	Use case that you want to map a clause with. **Note:** Only active use cases for contract analysis are displayed in the list.
Request table	Request table that contains the clauses that you want to map. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose a different table for the mapping.
Field group	Field group that you want to map a clause with. **Note:** Only active field groups are displayed.
Clause	Clause that you want to map the field group to.

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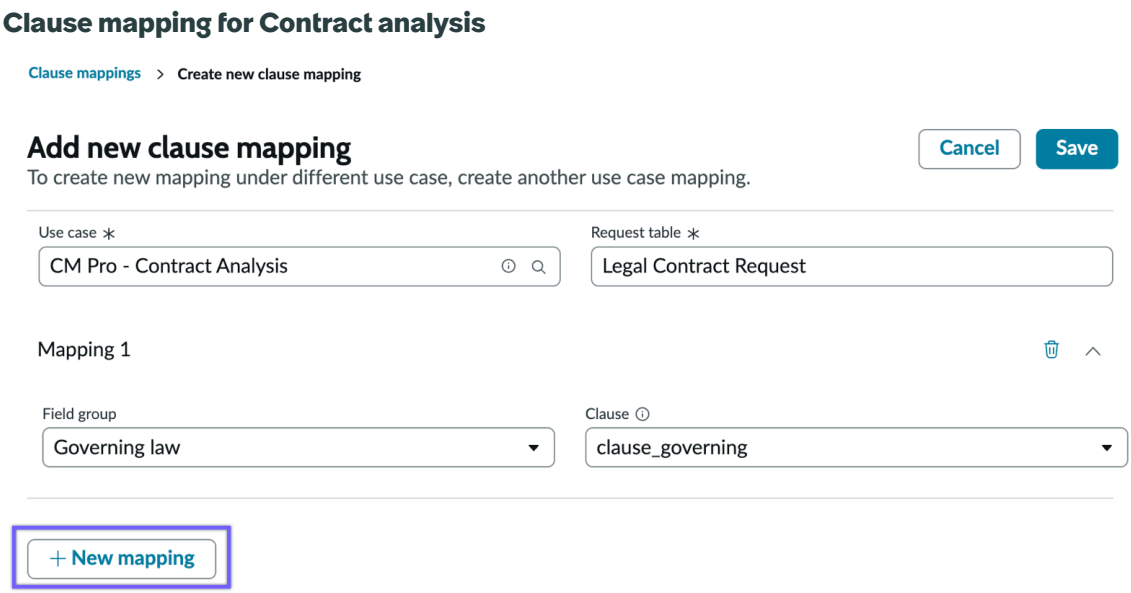
Field	Description
	Note: Only active clauses are displayed in the list.

8. **Optional:** Add another field group to a clause variation by selecting **New mapping**.



9. Select **Save**.

Result
The field groups are mapped to clauses of the clause library. Now Assist uses the mapped clause content to display suggestions for a missing or non-standard clause.

What to do next
Map a field to an expected response

Related topics
Create use cases for contract analysis

Map a field to an expected response

Map a field of a use case to an expected response. Now Assist uses the field mapping to identify a non-standard clause in a contract document.

Before you begin
Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.

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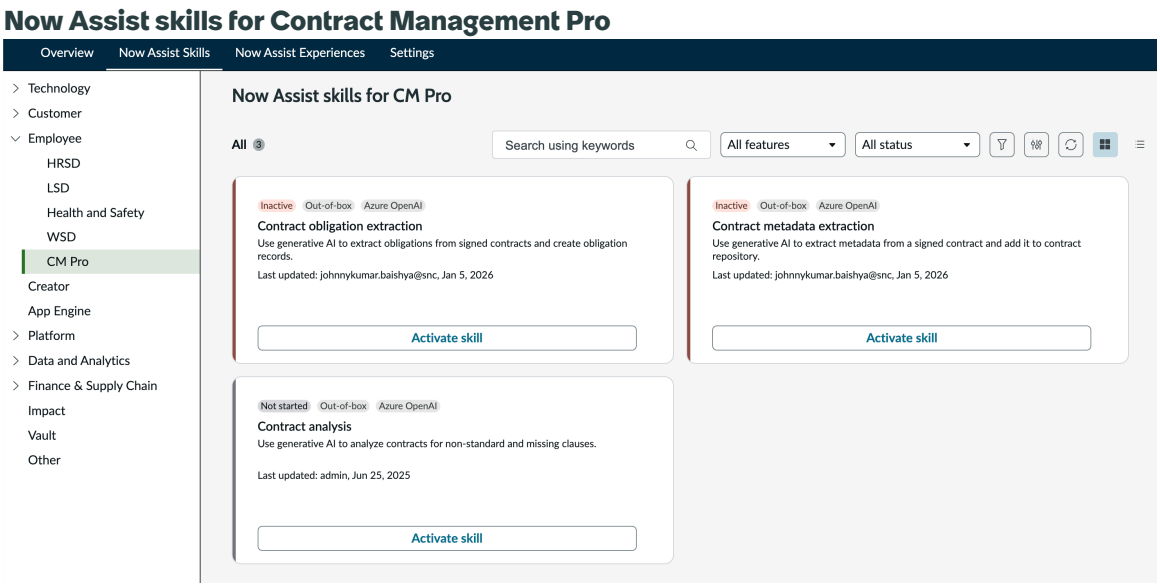

4. In the General details page, view the skill details and select **Save and continue**.
5. In the Use case page, select **Save and continue**.
   For more information on creating a use case, see Create use cases for contract analysis.
6. In the Clause mappings page, select **Save and continue**.
   For more information on mapping a field group to a clause, see Map a field group to a clause.
7. In the Expected response mappings page, select **New response**.
8. On the form, fill in the fields.

Expected Response Mappings form

Field	Description
Use case	Use case that the field is associated with. **Note:** Only active use cases for contract analysis are displayed in the list.
Request table	Table that the contract analysis is executed from. **Note:** The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose a different table for the mapping.
Field	Field (question prompt) that is mapped to the expected response. **Note:** Only active fields are displayed in the list.

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Field	Description
Expected response	Expected response: ○ Yes: When Now Assist returns the same response as expected, the system considers the field as standard. ○ No: When Now Assist returns a response that differs from the expected answer, the system considers the field as non-standard. All such fields within a field group are categorized as non-standard and are displayed in transaction results with AI-generated comments in both the workspace and Word Add-in.
Applies when	Conditional fields that are based on an expected response. **Note:** If this condition fails, the expected answer isn't considered. For more information on using the condition builder, see Create a condition statement using the condition builder.
Order	Order in which the expected response is evaluated if a field has been mapped to multiple responses. Now Assist evaluates the expected response from the lowest ordered number to the highest ordered number. Now Assist stops evaluating when the expected response is satisfied.

9. Select **Save**.

Result
The fields of the contract analysis use case are mapped to expected responses. Now Assist uses the field mapping to identify a non-standard clause on a contract document.

What to do next
Map a use case for contract analysis

Related topics
Create use cases for contract analysis

Map a use case for contract analysis
Map a use case to specific tables, and define conditions to apply the use case for contract analysis.

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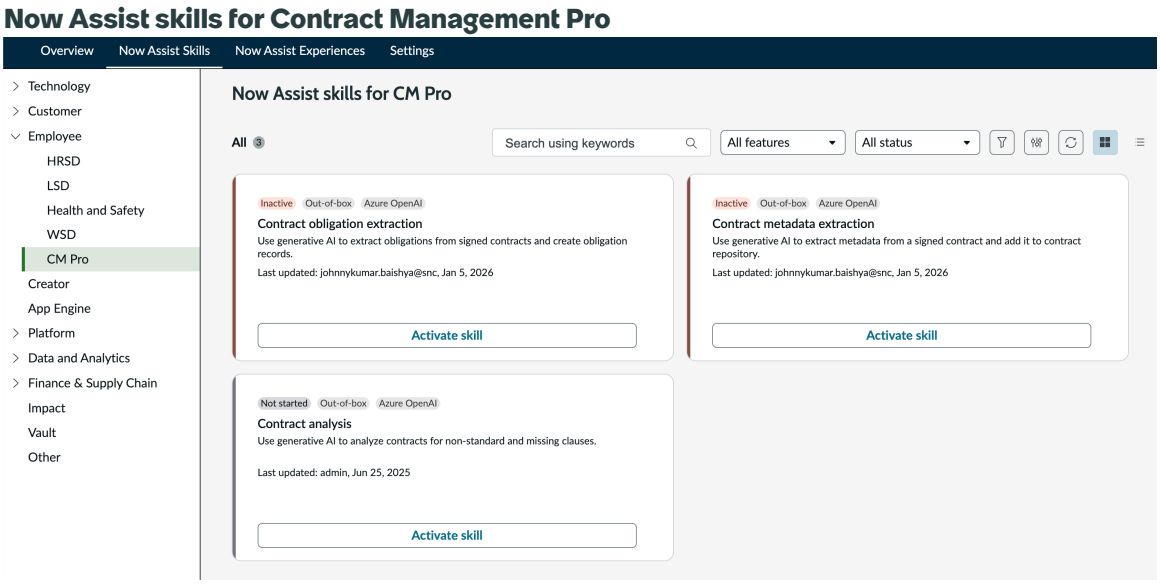
Before you begin

Ensure that the application is in Global or Now Assist in Contract Management scope. If you are configuring the use case mapping in different application scope, add the scoped ACL to the Use Case Mapping table (sn_cm_gen_ai_usecase_configuration).

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.



4. In the General details page, view the skill details and select **Save and continue**.
5. In the Use case page, select **Save and continue**.
   For more information on creating a use case, see Create use cases for contract analysis.
6. In the Clause mappings page, select **Save and continue**.
   For more information on mapping a field group to a clause, see Map a field group to a clause.
7. In the Expected response mappings page, select **Save and continue**.
   For more information on mapping a field to an expected response, see Map a field to an expected response.
8. In the Use case mappings page, select **New**.
9. On the form, fill in the fields.

Use Case mapping form

Field	Description
Name	Unique name of the use case mapping.
Use case	The use case used to analyze contract for non-standard or missing clauses.

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Field	Description
	Note: Only active use cases for contract analysis are displayed in the list.
Contract type	The contract type for which the use case will apply. **Note:** Only active contract types are displayed in the list.
Order	Order in which the use case will apply. If multiple use cases meet the same conditions, the use case with the lowest order number is applied first.
Request table	The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure the use case mapping on a different table.
Request conditions	Conditions under which the use case is applicable. For more information on using the condition builder, see Create a condition statement using the condition builder.

10. Select **Save**.

Result
The use case is mapped to specific tables and conditions. Now Assist applies the use case for contract analysis when the conditions are met.

Related topics
Create use cases for contract analysis

Configuring contract obligation extraction
Configure and map use cases for the contract obligation extraction skill in the Now Assist Admin console to automatically extract key contractual obligations from signed contracts.

Create use cases for contract obligation extraction
Create obligation extraction use cases to specify the types of key contractual obligation that you want Now Assist to detect and extract from contract documents.

About this task
The following video walks you through the process of creating use cases for the contract obligation extraction skill.

https://player.vimeo.com/video/1152215917?h=cb5bf8c30f&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin
Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

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About this task

In the contract obligation extraction skill, you can create a use case to define the category and subcategory of obligations that you want to extract from a contract.

For each use case, you can add fields with detailed prompts to define the obligation category, subcategory, and description of the subcategory. The information is used by the large language model (LLM) to identify and extract obligations from a contract. You must add a separate field for each obligation category that you want to extract.

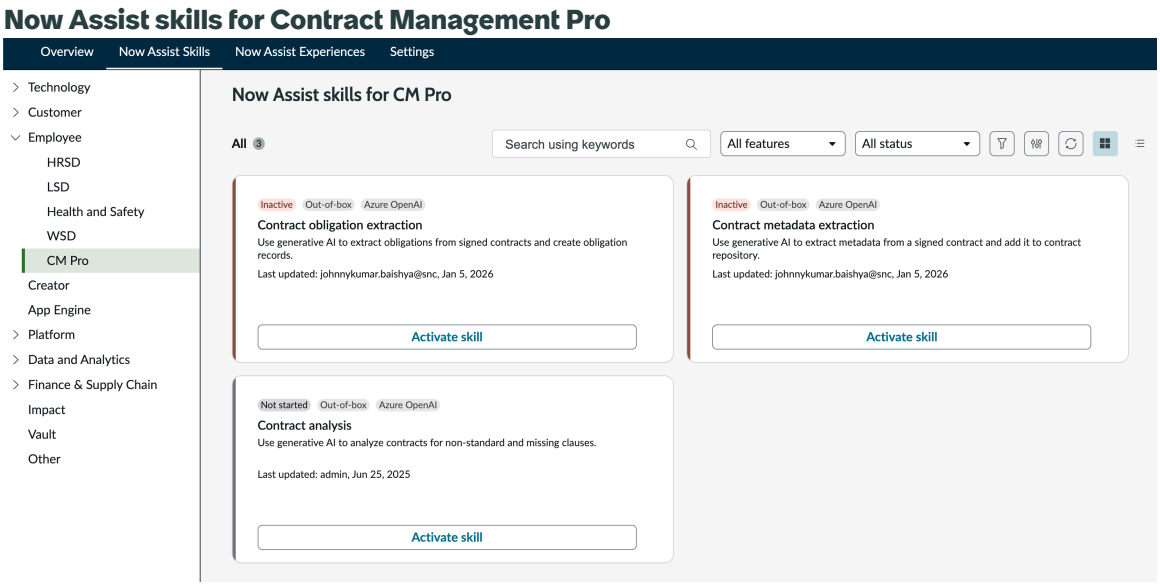
Comprehensive use cases ensure that obligation extraction is precise, consistent, and aligned with your compliance requirements.

The CM Pro - Contract Obligation Extraction use case is available with the in base system. This use case isn't editable.

Note: If you create your own use case or customize a copy of an available use case, be sure to test it thoroughly to ensure accuracy.

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.



4. On the General details page, view the skill details and select **Save and continue**.
5. In the Contract obligation extraction use cases page, select **New use case**.
6. In the Define use case page, add the use case details and select **Save and continue**.

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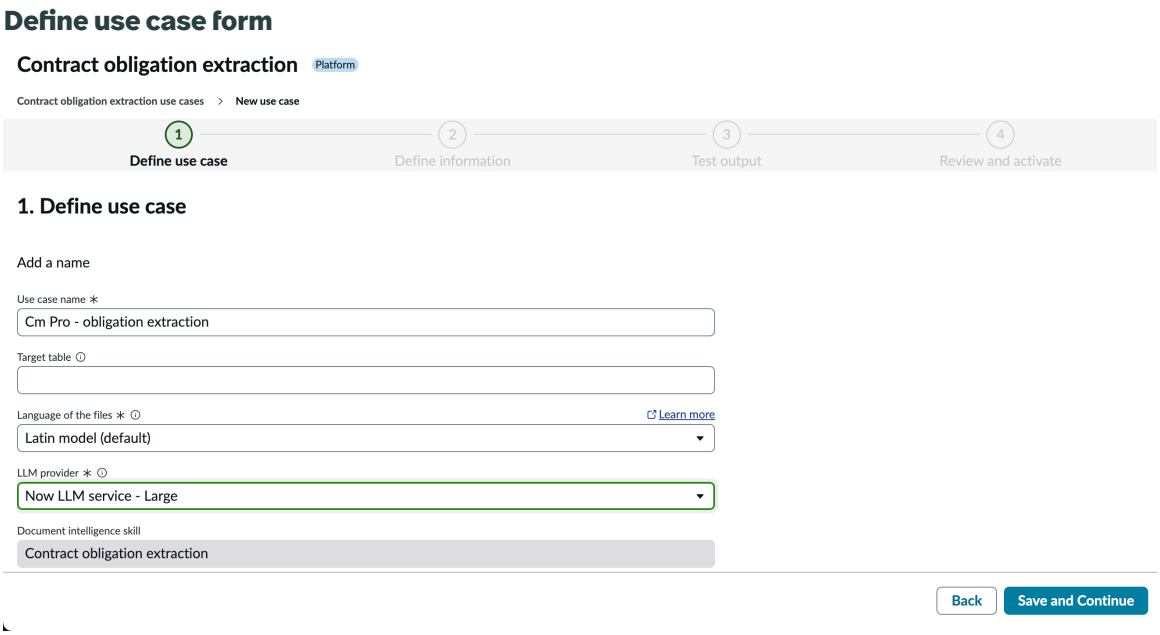

Define use case form

Field	Description
Use case name	Unique name of the use case.
Target table	This field should be left empty.
Language of the files	Language of the contract documents from which you want to extract the obligations. For more information on supported languages, see Languages supported by Document Intelligence.
LLM provider	Large language model (LLM) provider for the use case that is used to extract obligations. **Note:** For contract obligation extraction use cases, select large LLMs such as Now LLM Service Large to ensure more accurate results.
Image mode	Improves the efficiency of processing images for third-party multi-modal LLMs like Google Gemini, Azure OpenAI. The field is available only when a third-party multi-modal LLM is selected in the **LLM provider** field. **Note:** Selecting image mode reduces the page count limit to 10 pages per file.
Document intelligence skill	Displays the skill name for which you're creating the use case.

7. In the Define information page, select **Add a field** to add fields for the use case.

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a. In the New field window, select **Question**.

b. Enter the details for the new question.

Question form

Field	Description
Question	Details of the obligation that you want to extract. The information is used by the LLM to identify and extract obligations from contracts. The details must include the category and subcategory of the obligation that you want to extract along with a description that explains the specified subcategory. For an example of a description, refer to the **Details** field of a question in the CM Pro - Contract Obligation Extraction use case that is available with the base system.
Field type	Type of the information to be extracted. For obligation extraction, select `Text`.
Target table	This field should be left empty.
Target field	This field should be left empty.

For more information on the field form, see Question form for use case setup.

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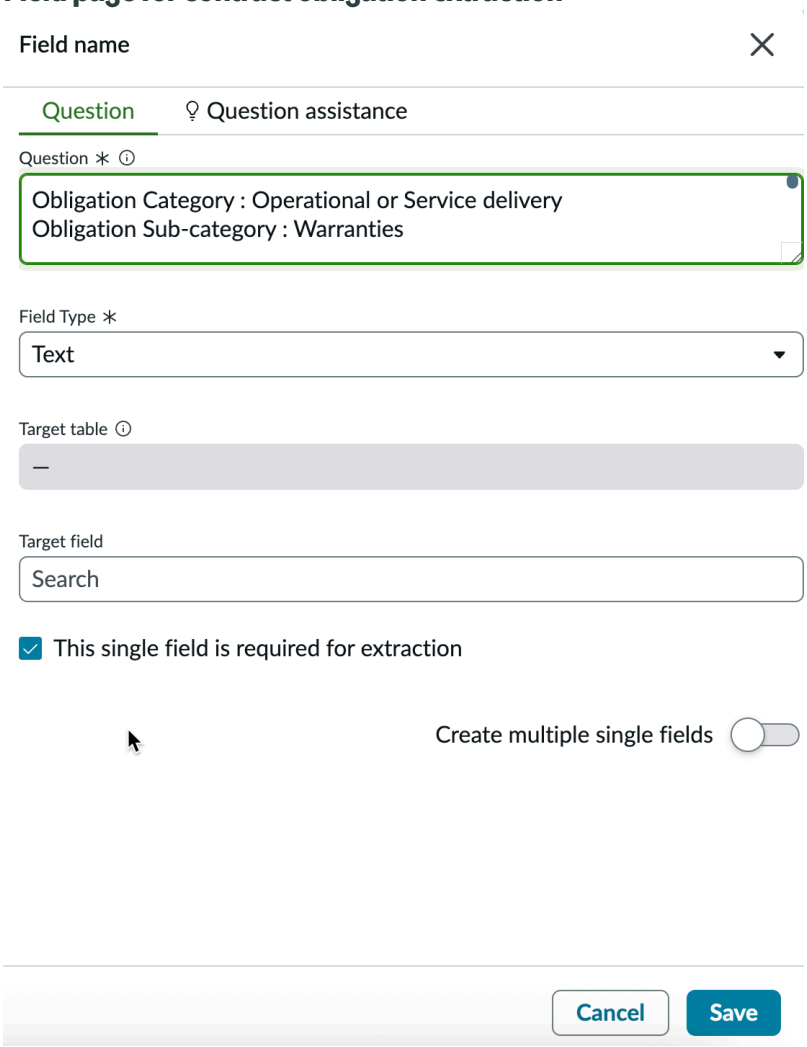
Field page for contract obligation extraction



c. **Optional:** Turn on the toggle switch for **Create multiple fields** to create multiple fields without closing the window.

d. Select **Save**.

Note: After adding questions, be sure to test them thoroughly to ensure accuracy.

8. Select **Save and Continue**.
9. **Optional:** Upload a document to test how the contract metadata extraction skill works with the new use case.

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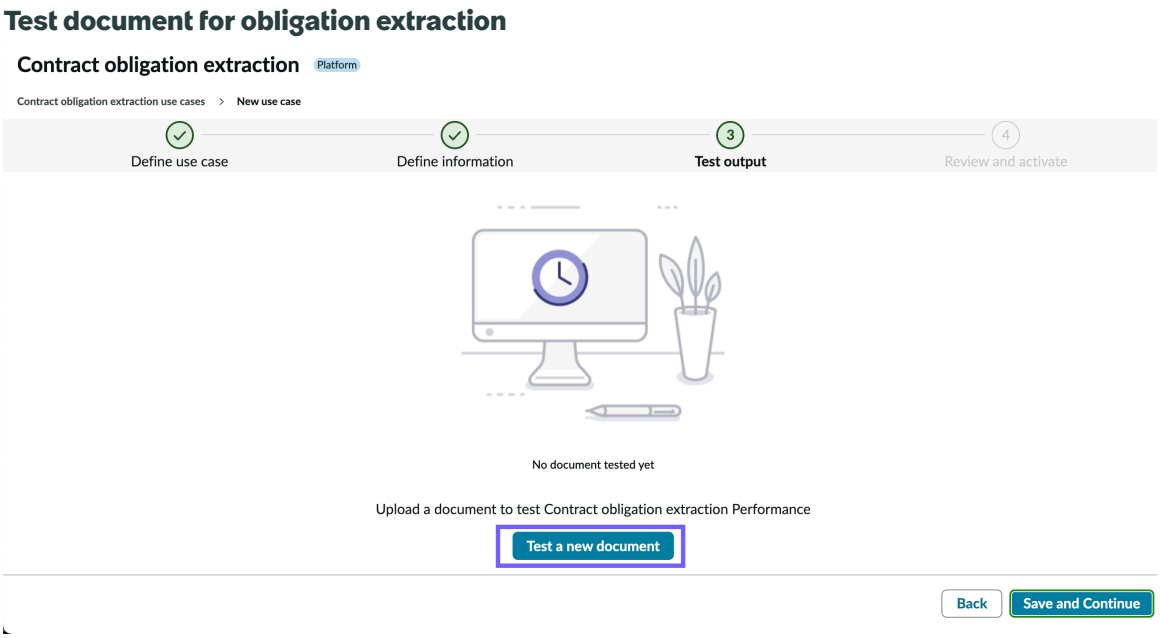


a. Select **Test a new document**.

b. Upload a document from a record or from the device.
You can test documents that are in .pdf format.

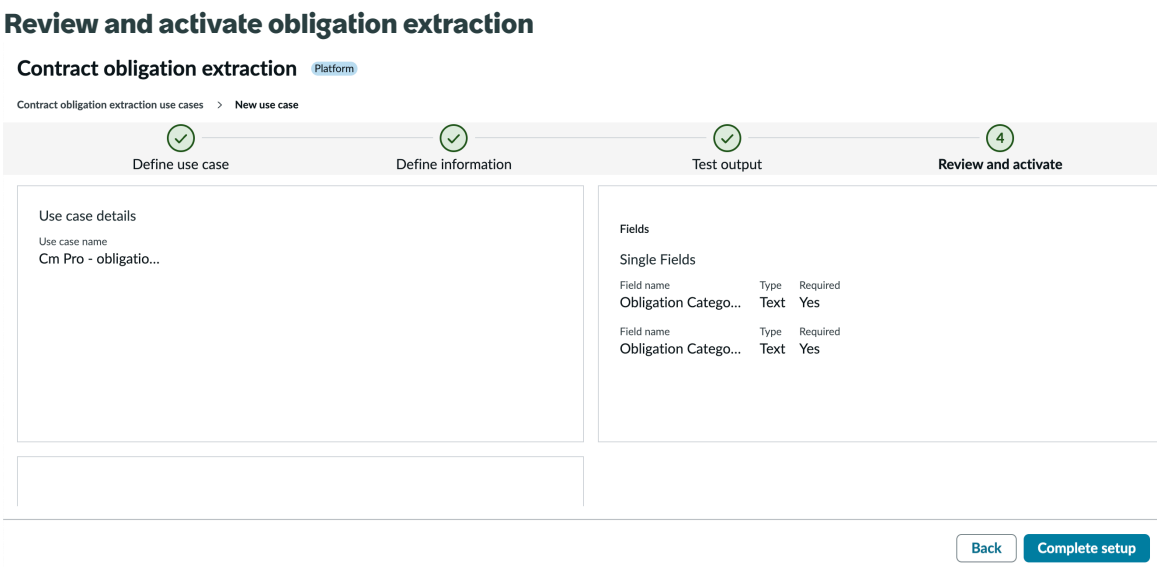
c. Select **Continue**.
The obligation extraction results for the uploaded document are displayed in the side panel.

(Optional) Upload and test another document by selecting **Test a new document**.

d. Optional: Add new fields or update the existing fields by selecting **Back**.

e. Select **Save and continue** to proceed.

10. Review the use case details and select **Complete setup**.



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Result
The use case is created for the contract obligation extraction skill. The LLM uses the use case to extract obligations from signed contracts.

What to do next
Map a use case for contract obligation extraction

Map a use case for contract obligation extraction

Map a use case to specific tables, and define conditions to apply the use case for obligation extraction.

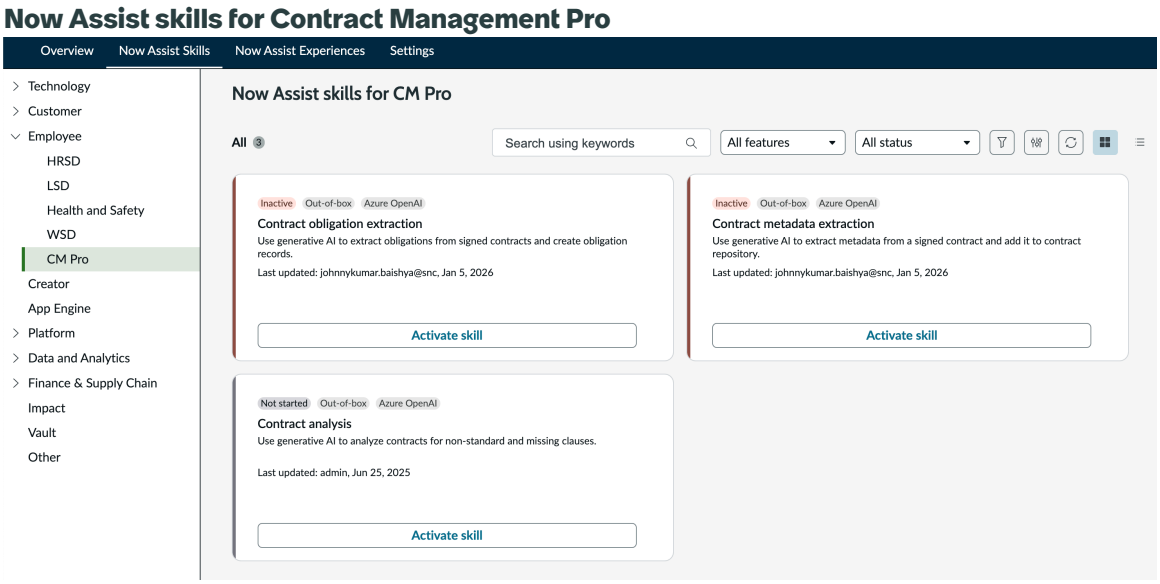
Before you begin
Ensure that the application scope is in the Global or Now Assist in Contract Management scope. If you're configuring the use case mapping in a different application scope, add the scoped ACL to the Use Case Mapping table (sn_cm_gen_ai_usecase_configuration).

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_core.contract_config

About this task
The following video walks you through the process of mapping a use case for the contract obligation extraction skill.

https://player.vimeo.com/video/1152220883?h=07ac83028e&badge=0&autopause=0&player_id=0&app_id=58479

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. Select **Activate skill** on the skill you want to activate.



4. In the General details page, view the skill details and select **Save and continue**.
5. In the Use case page, select **Save and continue**.
   For more information on creating a use case, see Create use cases for contract obligation extraction.
6. In the Use case mappings page, select **New**.

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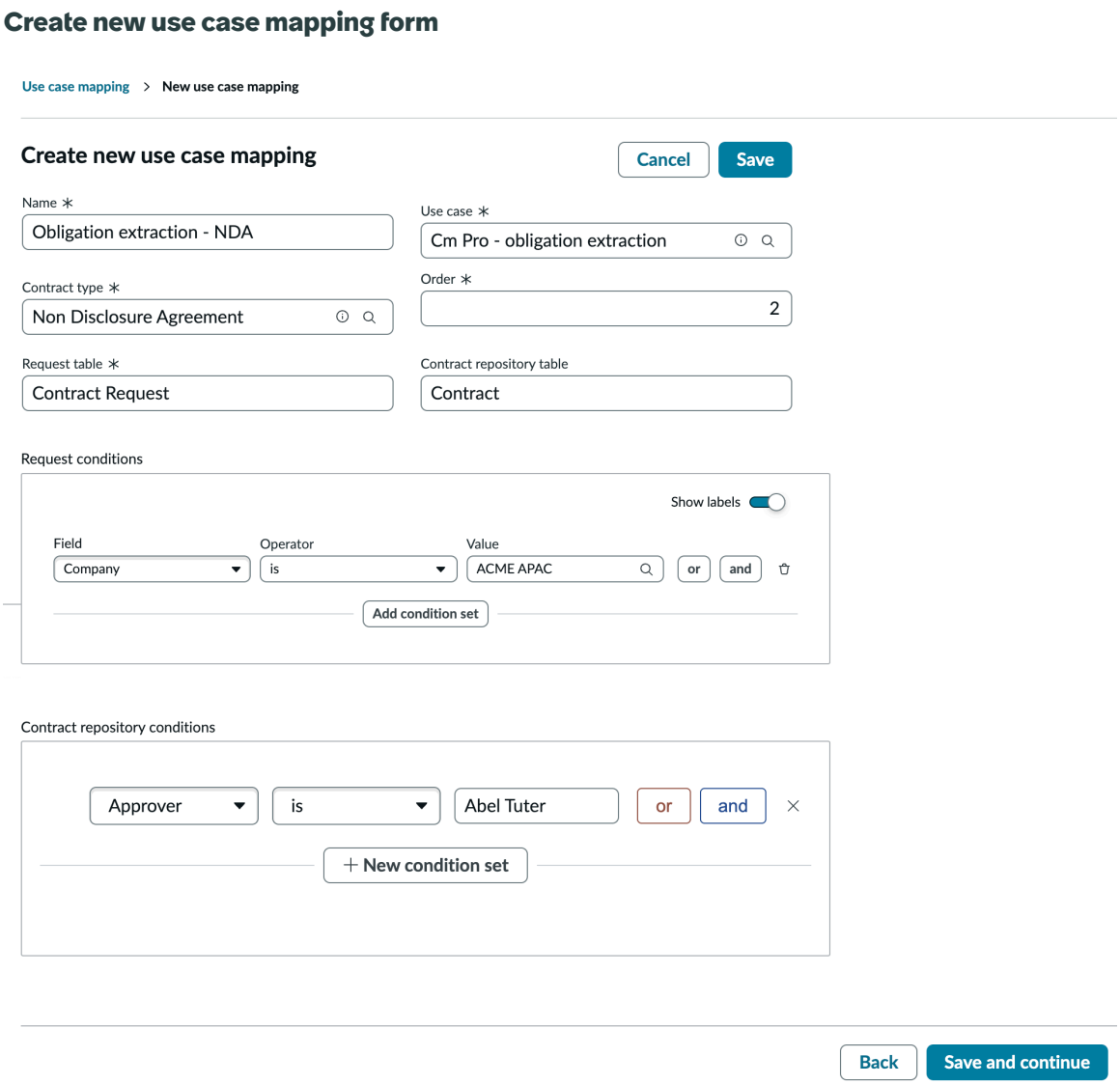
7. On the form, fill in the fields.
   For a description of the field values, see Contract obligation extraction use case mapping form.



8. Select **Save**.

Result

The use case is mapped to specific tables and conditions, and it's applied for obligation extraction when the conditions are met.

What to do next

Activate business rules for the Manage contract repository agentic workflow

Related topics

Create use cases for contract obligation extraction

Contract obligation extraction use case mapping form

Use the Create use case mapping form in the contract obligation extraction skill to map the use case to specific tables and conditions.

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Create use case mapping form

Field	Description
Name	Unique name of the use case mapping.
Use case	The use case used to extract obligations from a signed contract. **Note:** Only active use cases for the contract obligation extraction skill are displayed in the list. The **CM Pro - Contract Obligation Extraction** use case is available with the Now Assist in Contract Management base system.
Contract repository table	The repository table where the contract records are created. The use case applies to contracts stored in the selected table.
Order	Order in which the use case will apply. If multiple use cases meet the same conditions, the use case with the lowest order number is applied first.
Contracts created from contract request	Option to apply the use case to contracts initiated from a contract request. When the check box is cleared, the use case applies to contracts that are directly uploaded on a contract record, without a contract request. The check box is selected by default. **Note:** The check box appears only when the Now Assist in Contract Management (sn_cm_gen_ai) and Contracts core (sn_cm_core) plugins are installed.
Contract type	The contract type for which the use case applies. **Note:** Only active contract types are displayed in the list. This field appears only when the **Contracts created from contract request** check box is selected.
Request table	The table from which contract requests are created. The use case applies to contracts created from the selected table. The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to configure the use case mapping on a different table. This field appears only when the **Contracts created from contract request** check box is selected.

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Create use case mapping form (continued)

Field	Description
Request conditions	Conditions under which the use case applies on the request table. The field appears only when the request table is selected. For more information on using the condition builder, see Create a condition statement using the condition builder.
	The field appears only when the **Contracts created from contract request** check box and the request table are selected.
Repository conditions	Conditions under which the use case applies on the repository table. The field appears only when a table is selected in the **Contract repository table** field. For more information on using the condition builder, see Create a condition statement using the condition builder.

Configuring agentic workflows in Now Assist in Contract Management

Configure agentic workflows in Now Assist in Contract Management so that contract fulfillers can use the AI agents to perform specific tasks autonomously.

Complete the following steps to configure agentic workflows in Contract Management Pro.

1. Install the Contract Management Pro - Prime plugin (sn_cm_ai_prime).

   For information about the plugin installation process, see Install Now Assist plugins.

2. Ensure Now Assist panel is turned on. For more information, see Turn on the Now Assist panel.
3. Ensure **Now Assist Panel - Platform (default)** assistant in the CI Admin Experience is turned on. For more information, see Manage LLM virtual agents on the Assistants screen.
4. Configure the security controls to specify the users who can discover or use the agentic workflow, and provide data permissions for the agentic workflow.

   For more information, see Configuring user access and data permissions for agentic workflows.

5. Configure the security controls to specify the users who can discover or use the agentic workflow, and provide data permissions for AI agents.

   For more information, see Configuring user access and data permissions for AI agents.

6. Ensure that Contract metadata extraction and Contract obligation extraction skills are configured and activated in Now Assist Admin console.

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For more information, see Configuring contract metadata extraction and Configuring contract obligation extraction.

7. Activate business rules for the agentic workflow to run the AI agents autonomously. For more information, see Activate business rules for the Manage contract repository agentic workflow.
8. If you want to modify an agentic workflow, duplicate it and then update it.

   For more information see:

   - Duplicate an agentic workflow
   - Create an agentic workflow
   - Modify an agentic workflow
9. If you have customized the Manage contract repository agentic workflow, update the script include to run it autonomously.

   For more information, see Update the contracts AI agents handler script include.
10. Configure system properties to set the notice period for the Manage contract repository agentic workflow that will be used when the contract renewal notice period and termination of contract renewal notice period are not available in a contract.

    For more information, see Set the default notice period for the Manage contract repository agentic workflow.
11. Enable the email notification for contract metadata and obligation extraction to notify users when metadata extraction is completed.

    For more information, see Enable notifications for AI extracted metadata and obligations.

Activate business rules for the Manage contract repository agentic workflow

Activate the Agentic AI - Set reminders for contract and the Agentic AI Set reminders for Econtract business rules to autonomously run the Manage contract repository agentic workflow.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
   The Business Rules table appears.
2. In the Name column, search for `Agentic AI - Set reminders for contract`.
3. Open the *`Agentic AI - Set reminders for contract`* rule.
4. Select the **Active** check box.

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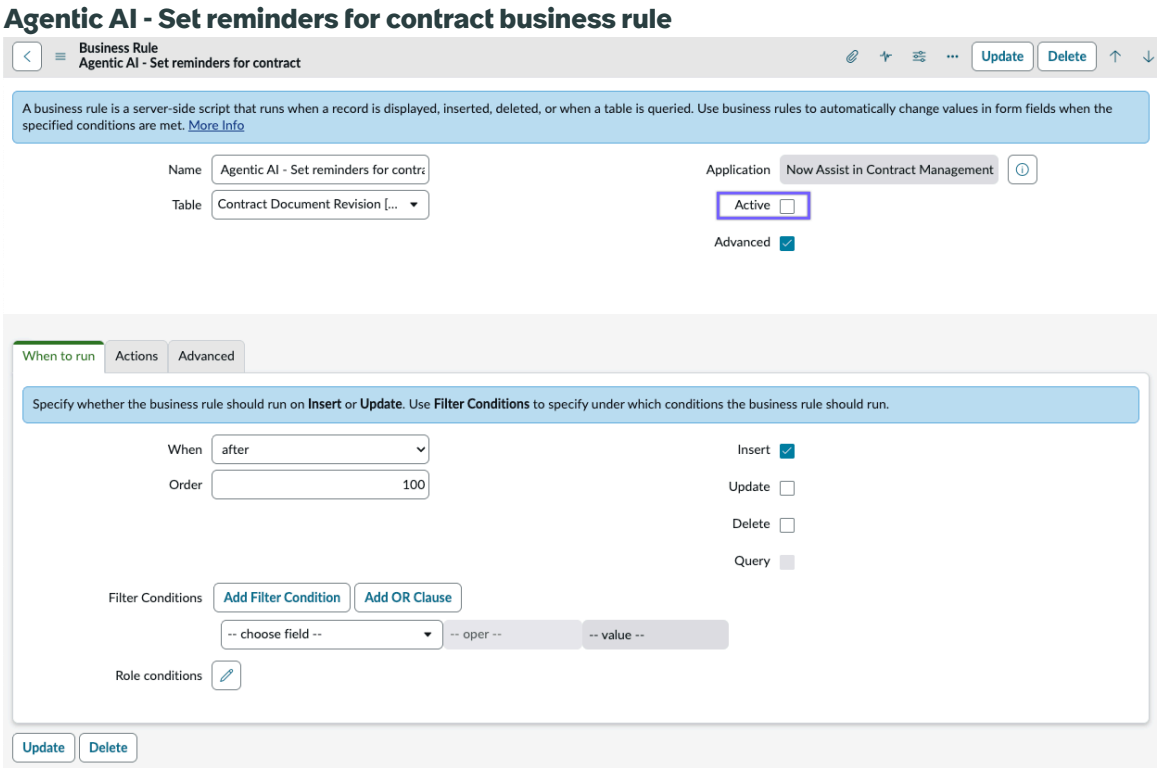

5. Select **Update**.
   The Business Rules table appears.
6. In the Name column, search for `Agentic AI Set reminders for Econtract`.
7. Open the *`Agentic AI Set reminders for Econtract`* rule.
8. Select the **Active** check box.

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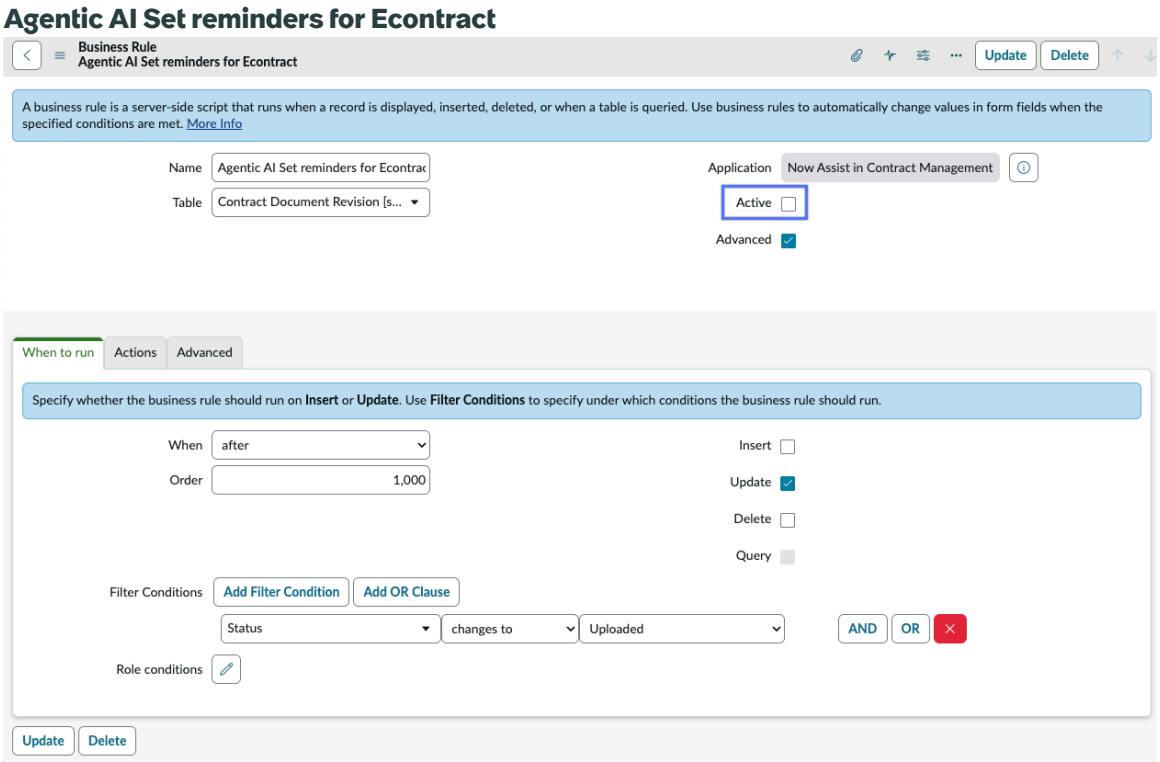

9. Select **Update**.

Result

The Manage contract repository agentic workflow is activated for Now Assist in Contract Management.

Related topics

- Set the default notice period for the Manage contract repository agentic workflow
- Update the contracts AI agents handler script include
- Enable notifications for AI extracted metadata and obligations

Configuring user access and data permissions for agentic workflows

Configure the security controls to specify the users who can discover or use the agentic workflow, and provide data permissions for the agentic workflow.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an agentic workflow.

In Now Assist in Contract Management, the following roles are configured with the base system to provide data access to the agentic workflows in Contract Management Pro.

- sn_cm_gen_ai.ai_contract_fulfiller
- sn_lg_cnt.contract_fulfiller
- sn_lg_ops.request_fulfiller
- sn_cm_core.contract_fulfiller
- contract_manager

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- sn_lg_cnt.contract_owner
- sn_cm_obligation.obligation_fulfiller

To ensure that the agentic workflow can access all the required information for your workspace, add the necessary roles for the agentic workflow in the AI Agent Studio.

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **.**
2. Select the **Agentic workflows** tab.
3. Open the agentic workflow for which you want to configure the security controls.
4. In the guided setup, navigate to **Define security controls** to define the security access.
   a. In the **Define user access** tab, add the user roles who can discover or invoke the agentic workflow.
   b. In the **Define data access** tab, add the user roles to define which roles the agentic workflow uses to access data during its execution.

      This configuration controls what information the agentic workflow can read, update, or share, based on the permissions of the selected roles.

For more information on configuring the security controls, see Define security controls for an agentic workflow.

Related topics

Configuring user access and data permissions for AI agents

Configuring user access and data permissions for AI agents

Configure the security controls to specify the users who can discover or use the agentic workflow, and provide data permissions for AI agents.

AI agents use role masking to determine which users can access them. Ones installed with Now Assist applications have specific roles that come included with the application. If you select *`Users with specific roles`* for user access, you must configure the security controls to include these roles. For the instructions to change the security controls, see Define security controls for an AI agent.

The following roles are configured with the base system to provide data access to the AI agents in the agentic workflows of Contract Management Pro.

- sn_cm_gen_ai.ai_contract_fulfiller
- sn_lg_cnt.contract_fulfiller
- sn_lg_ops.request_fulfiller
- sn_cm_core.contract_fulfiller
- contract_manager
- sn_lg_cnt.contract_owner
- sn_cm_obligation.obligation_fulfiller

To ensure that the AI agent can access all the required information for your workspace, add the necessary roles for the AI agent in the AI Agent Studio.

1. Navigate to **All** > **AI Agent Studio** > **Create and manage** > **.**
2. Select the **AI agents** tab.
3. Open the AI agent for which you want to configure the security controls.

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4. In the guided setup, navigate to **Define security controls** to define the security access.
   a. In the **Define user access** tab, add the user roles who can discover or invoke the AI agent.
   b. In the **Define data access** tab, add the user roles to define which roles the AI agent uses to access data during its execution.

      This configuration controls what information the AI agent can read, update, or share, based on the permissions of the selected roles.

For more information on configuring the security controls, see Define security controls for an AI agent.

Related topics

Configuring user access and data permissions for agentic workflows

Set the default notice period for the Manage contract repository agentic workflow

Configure system properties to set the default notice period for the Manage contract repository agentic workflow.

Before you begin

Role required: sn_cm_core.contract_admin or sn_cm_core.contract_config

About this task

When the contract renewal notice period and termination of contract renewal notice period are not available in a contract, the Manage contract repository agentic workflow uses the default notice period along with other contract details to set the contract milestone reminders.

Note: The default notice period in the base system is 60 days.

Procedure

1. Navigate to the **All** menu and enter `sys_properties.list` in the navigation filter.
   The System Properties [sys_properties] table appears.
2. In the Name column, search for `sn_cm_gen_ai.contract_notice_period_in_days`.
3. Select the *sn_cm_gen_ai.contract_notice_period_in_days* property.
4. Update the **Value** field to set the default notice period.
   The default value is **60**.

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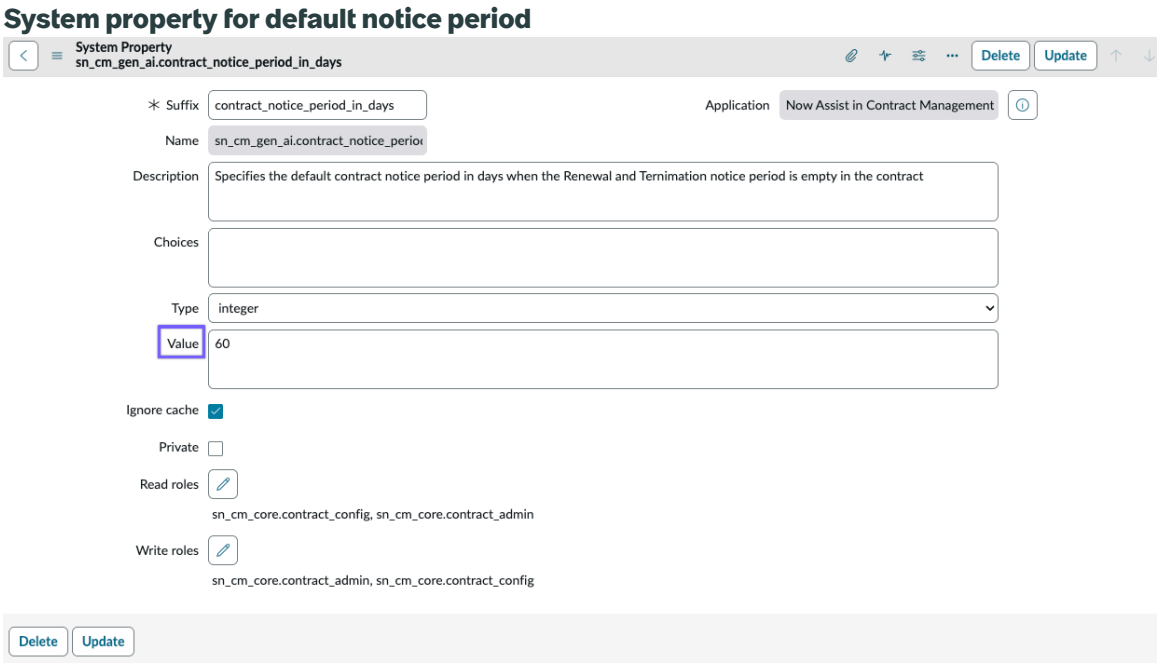

5. Select **Update**.

Result

The Manage contract repository agentic workflow uses the set value as default notice period when the contract renewal notice period and termination of contract renewal notice period are not available in a contract.

Related topics

- Activate business rules for the Manage contract repository agentic workflow
- Update the contracts AI agents handler script include
- Enable notifications for AI extracted metadata and obligations

Update the contracts AI agents handler script include

Update the ContractsAIAgentsHelper script include to add the sys_id of a customized Manage contract repository agentic workflow to run the agentic workflow autonomously.

Before you begin

Role required: admin

About this task

When you duplicate the Manage contract repository agentic workflow and create a customized agentic workflow, you must add the sys_id of the new agentic workflow in the ContractsAIAgentsHelper script include to run the agentic workflow autonomously.

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
   The Script Includes table appears.
2. In the Name column, search for `ContractsAIAgentsHelper`SNC.
3. Open *`ContractsAIAgentsHelperSNC`*.
4. In the **Script** box, copy the `startAiAgentConversation()` method.

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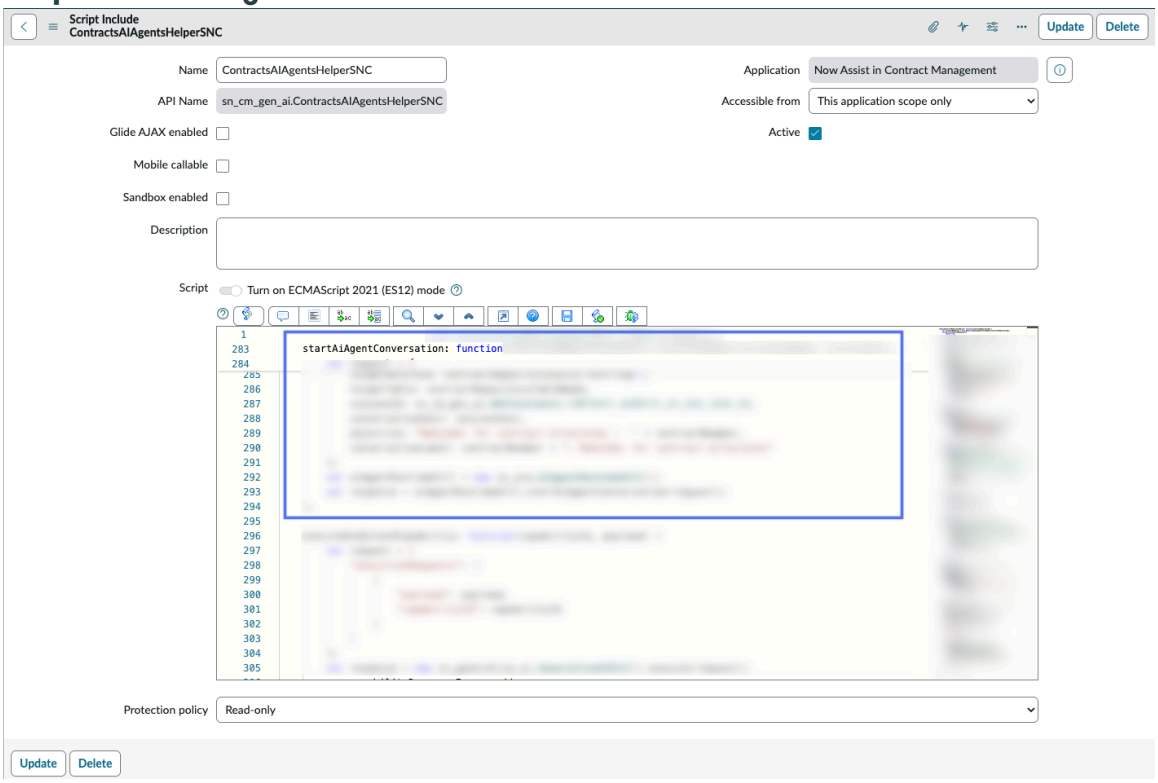
Script include for agentic workflow



5. Navigate back to the Script Include table.
6. In the Name column, search for `ContractsAIAgentsHelper`.
7. Open *`ContractsAIAgentsHelper`*.
8. In the **Script** box, paste the `startAiAgentConversation()` method.
9. In usecaseId, add the sys_id of the new agentic workflow.
   You can copy the sys_id of the new agentic workflow from the Use case [sn_aia_usecase] table.
10. Select **Update**.

Result

The customized Manage contract repository agentic workflow runs autonomously when all the trigger conditions are met.

For more information, see Manage contract repository agentic workflow.

Related topics

- Activate business rules for the Manage contract repository agentic workflow
- Set the default notice period for the Manage contract repository agentic workflow
- Enable notifications for AI extracted metadata and obligations

Enable notifications for AI extracted metadata and obligations

Enable the email notifications for metadata extraction and obligation extraction to notify users when metadata extraction and obligation extraction are complete.

Before you begin

Role required: admin

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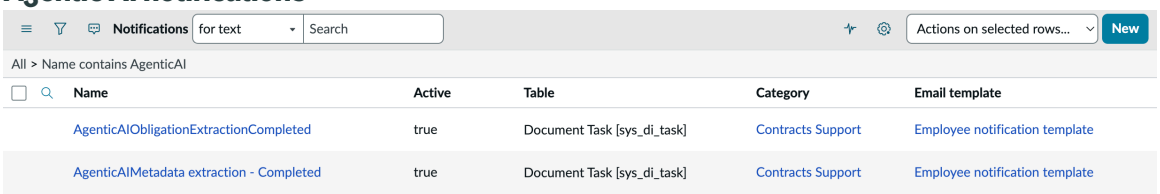
About this task

The *AgenticAIMetadata extraction - Completed* and *AgenticAIObligationExtractionCompleted* notifications are not active by default.

Procedure

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. In the Name column, search for `AgenticAI`.
3. Select the notification.Select .
   - To activate notifications for metadata extraction, select *AgenticAIMetadata extraction - Completed*.
   - To activate notifications for obligation extraction, select *AgenticAIObligationExtractionCompleted*.

Agentic AI notifications



4. On the Notification form, select the **Active** check box.
5. Select **Update**.

What to do next

Configure the workspace URL for contract metadata extraction notifications

Related topics

- Activate business rules for the Manage contract repository agentic workflow
- Set the default notice period for the Manage contract repository agentic workflow
- Update the contracts AI agents handler script include

Configure Conversational contract search and insights

Configure Conversational contract search and insights skill to enable searching information in contracts using natural language and dialogue-driven queries, making it easier to find relevant information.

Important: This Now Assist skill is turned on by default. The skill will be automatically available to appropriate role users for the application. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Complete the following steps to configure Conversational contract search and insights.

Copy contract documents to contract repository

Copy signed contract documents into the contract repository for conversational search.

Index contracts table for conversational search

Index the data for conversational search.

Configuring user access and data permissions for agentic workflows

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Set the data access permissions for the agentic workflow- `Conversational Contract Search`.

Configuring user access and data permissions for AI agents

Set the data access permissions for the Agent- `Search contracts AI`.

Configure data permissions for Now Assist skills

Set the data access permissions for the Now Assist skills- `Contracts query enhancer`, `Contracts query classifier` and `Search contract with contextual input`.

Accessing the Agentic Workflow

If your generative AI service provider isn't Now LLM Service, verify that the API connections and credentials are configured. For more information, see Configuring API credentials for generative AI capabilities.

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Search for **Conversational Contract Search and Insights** and open it.

AI agents used in Search for Conversational Contract Search and Insights Workflow

AI agents names and descriptions

Name	Description
Search contracts AI agent	This agent helps you find and understand legal contracts and documents by giving search results for questions asked in natural language. It works as a conversational search and Q&A tool within the Contract Lifecycle Management system.
Document and visual insights AI agent	This agent helps with tasks related to processing of documents. For more information, see Document and visual insights AI agent.

Copy contract documents to contract repository

Copy signed contract documents into the contract repository for conversational search.

Before you begin

Role required: admin

About this task

Contract documents must be stored in the contract repository to enable conversational search and retrieve queried information. For existing contracts, run the scheduled job *`CM Pro - Copy Signed Document Revision to AST Repo`* to copy signed contract documents into the repository.

For new contracts, the scheduled job runs automatically when the contract request moves to Closed complete state.

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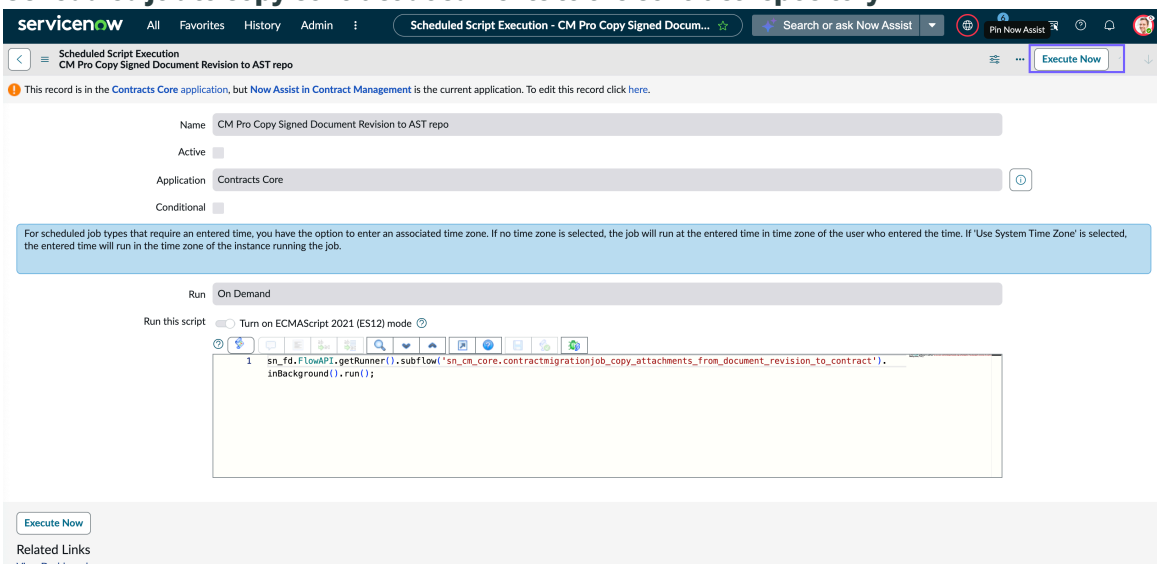
Procedure

1. Navigate to **All** > **System Definition** > **Scheduled jobs**.
2. Search for *CM Pro Copy Signed Document Revision to AST repo* and open the job.
3. Select **Execute Now**.

Scheduled job to copy contract documents to the contract repository



Result
The signed contract documents are copied into the contract repository.

What to do next
Index data for conversational search. Index contracts table for conversational search

Index contracts table for conversational search

Index the data for conversational search.

Before you begin
For existing contracts, verify you have run the scheduled job to copy signed contract documents into the contract repository. For more information, see Copy contract documents to contract repository.

Role required: admin

About this task
After installing Now Assist in Contract Management, index the data for getting search results.

Procedure
1. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
2. In the Name column, search for `Contract Repository`.
3. Select **Contract Repository** indexed source.
4. Select **Index All tables**.

Result
The contract repository tables are indexed for AI Search.

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Configure conversational search tables

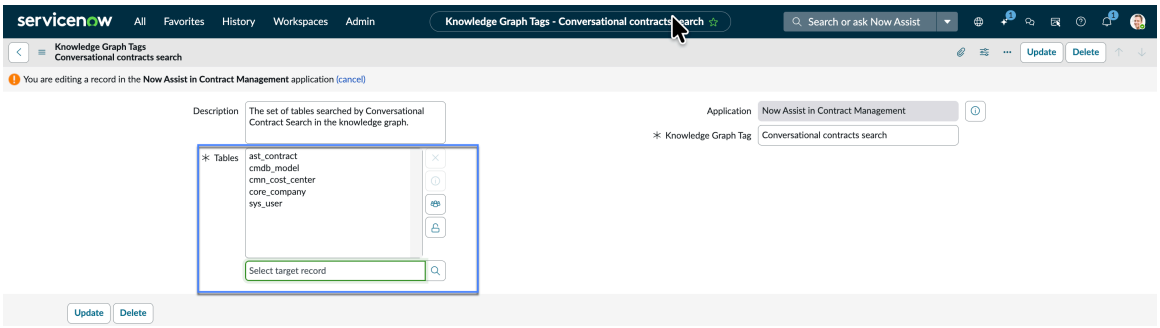
Use Knowledge graph tags to identify which tables should be used for answering natural language questions in conversational search.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Graph Tags**.
2. Select **Conversational contracts search** knowledge tag.
3. Select the Unlock tables ( ) icon.
4. Select the Lookup using list ( ) icon and add tables that should be used in conversational search.



5. Select **Update**.

Result

Records from the added tables are searched when responding to conversational search queries.

Post-upgrade steps for Now Assist in Contract Management

If you are upgrading to Now Assist in Contract Management from Yokohama (Patch 2 and lower) or Xanadu (Patch 8 and lower), and you have customized use cases, run a fix script to migrate the existing data to the Now Assist Admin console.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. In the **Name** field, search for `Upsert DI skill config`.
3. In the script, add the use case ids that you want to migrate to the Now Assist Admin console.

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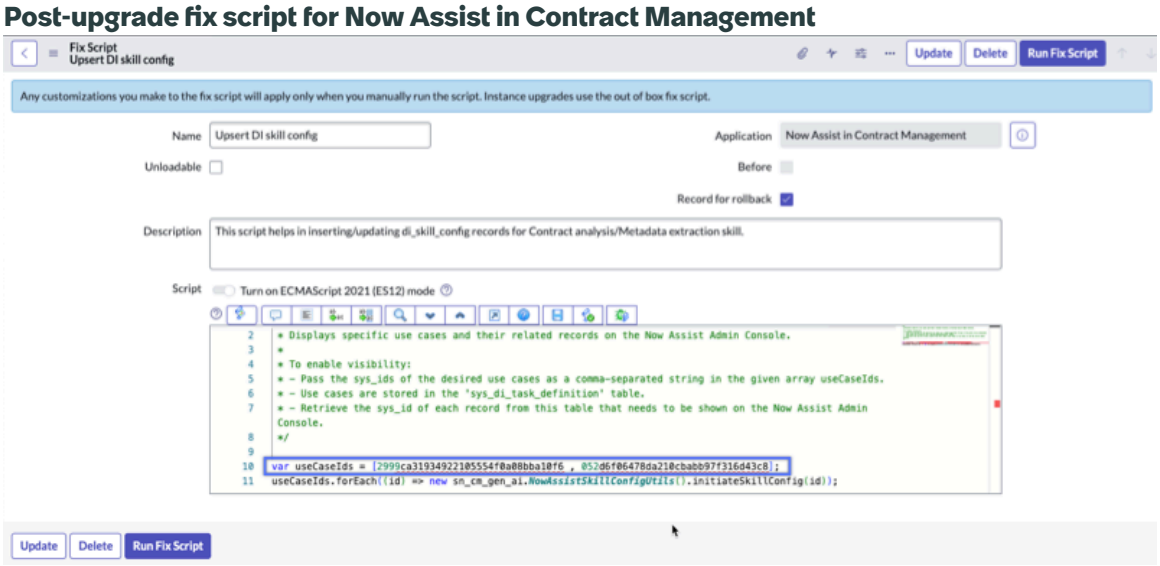

4. Select **Run Fix Script**.

Result

Your customized use cases are migrated to the Now Assist Admin console.

Related topics

Configuring contract metadata extraction

Configuring contract analysis

Managing skills for Now Assist in Contract Management

Update the Now Assist skills by modifying, deactivating, or deleting use cases, their associated fields, and other mappings.

Manage use cases for Now Assist in Contract Management

Manage use cases for Now Assist in Contract Management by updating the fields, deactivating them when not in use, deleting when no longer required, or copying existing use cases to create new ones.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_contract_config

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. On the tile of your activated skill that you want to modify, select **Edit** in the options menu (⋮).

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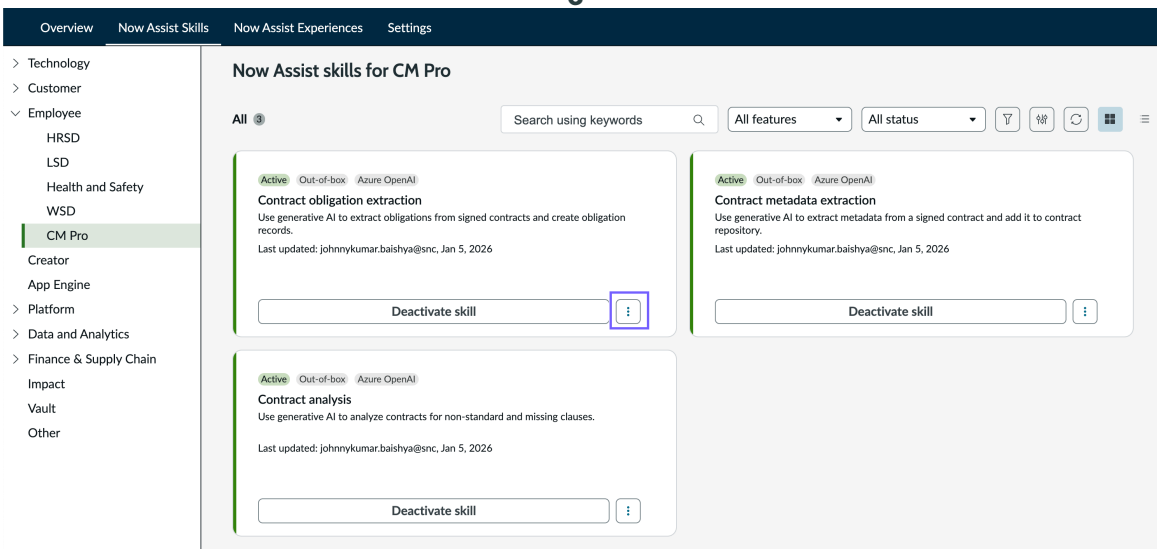
Active skills in Now Assist in Contract Management



4. In the skill guided setup, select **Use cases**.
5. Select the actions icon ⋮ on the use case that you want to update, delete, deactivate, or copy.

Edit

Modify the use case by adding new fields, or updating, deactivating, or deleting existing fields.

For more information on the **Field** form, see Field form for use case setup and Question form for use case setup.

The base system use cases, **CM Pro - Contract Metadata Extraction** for contract metadata extraction, **CM Pro - Contract Obligation Extraction** for obligation extraction, and **CM Pro - Contract Analysis** for contract analysis cannot be edited, deleted, or deactivated. To customize these use cases, make a copy of the base system use cases and update the copied versions.

Note: If you create your own use case or customize a copy of an available use case, be sure to test it thoroughly to ensure accuracy. You can upload a document in the Test outputs tab to test how the contract analysis skill works with the updated use case.

Make a copy

Copy an existing use case to create a new use case with the same fields and field groups. You can edit, delete, or deactivate the fields and field groups in the new use case.

Deactivate

Deactivate a use case to temporarily make it unavailable for the skill.

The **Reactivate** option appears when a use case is deactivated. Use this option to activate a use case.

Delete

Delete a use case when it is no longer required for the skill.

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Result
Now Assist applies the updated use case for contract analysis or metadata extraction.

Related topics
- Create use cases for contract metadata extraction
- Create use cases for contract analysis
- Create use cases for contract obligation extraction
- Select large language models for use cases in Now Assist in Contract Management

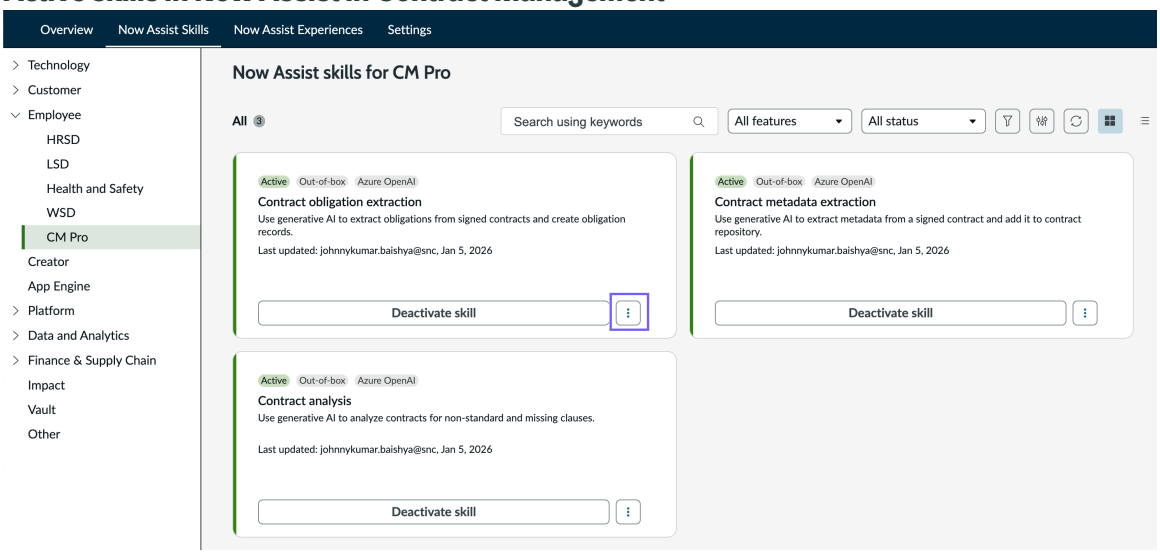
Manage use case mappings for Now Assist in Contract Management

Manage use case mappings for Now Assist in Contract Management by updating the mapped tables for use cases, deactivating the mappings when not in use, or deleting them when no longer required.

Before you begin
Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_contract_config

Procedure
1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. On the tile of your activated skill that you want to modify, select **Edit** in the options menu (⋮).

Active skills in Now Assist in Contract Management



4. In the skill guided setup, select **Use case mappings**.
5. Select the actions icon ⋮ on the use case mapping that you want to update, delete, or deactivate.

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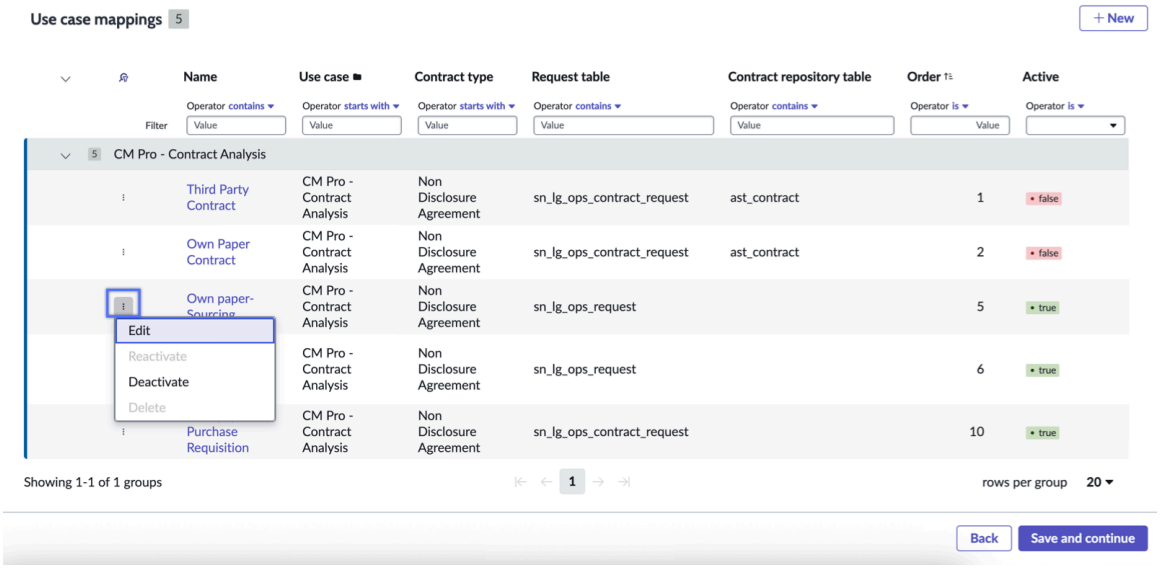
Use case mappings page



Edit

Update the mapped tables or conditions for the mapping.

For more information on mapping a use case, Map a use case for contract metadata extraction, Map a use case for contract obligation extraction, and Map a use case for contract analysis.

Deactivate

Deactivate a use case mapping to temporarily make it unavailable for the skill.

The **Reactivate** option appears when a use case mapping is deactivated. Use this option to activate a use case mapping.

Delete

Delete a use case mapping when it is no longer required for the skill.

Result

Now Assist uses the updated use case mapping for contract analysis or metadata extraction.

Related topics

- Map a use case for contract metadata extraction
- Map a use case for contract analysis

Manage clause mappings for contract analysis

Manage clause mappings for contract analysis by updating the mapped clause for a field group, deactivating the mappings when not in use, or deleting them when no longer required.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_contract_config

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.

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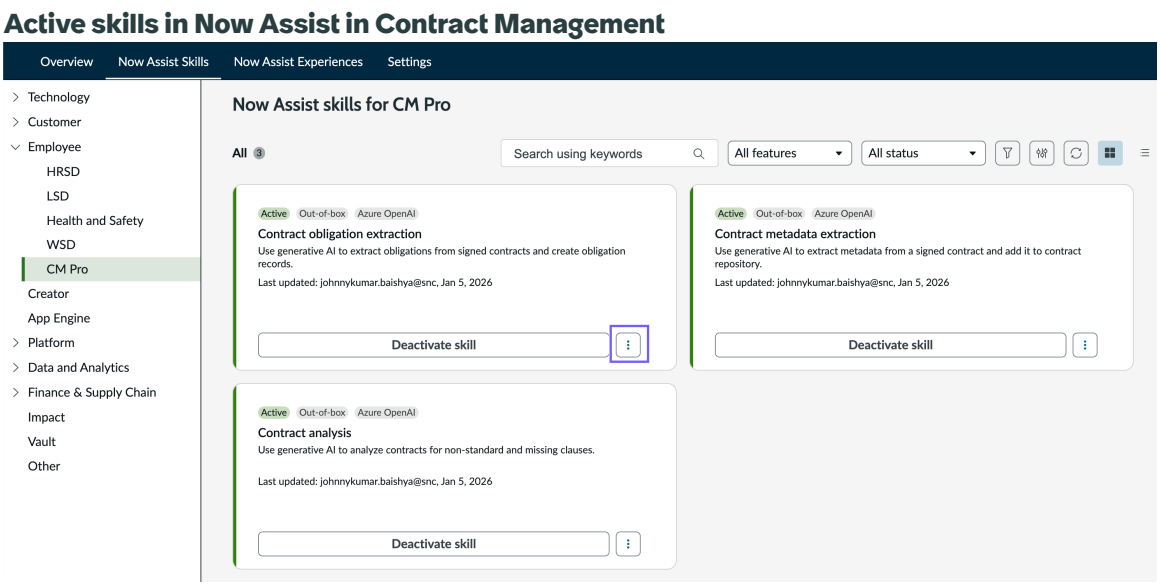
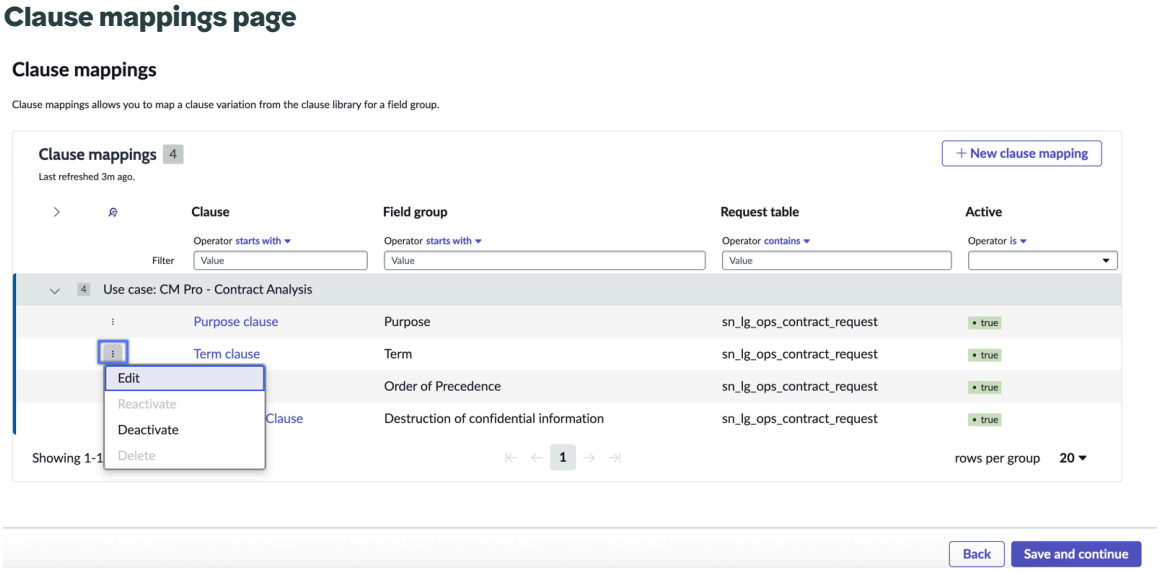
3. On the **Contract analysis** tile, select **Edit** in the options menu (⋮).



4. In the skill guided setup, select **Clause mappings**.

5. Select the actions icon ⋮ on the clause mapping that you want to update, delete, or deactivate.



Edit

Update the field group to clause mappings for a use case.

For more information on clause mapping, see Map a field group to a clause.

Deactivate

Deactivate a clause mapping to temporarily make it unavailable for the skill.

The **Reactivate** option appears when a clause mapping is deactivated. Use this option to activate a clause mapping.

Delete

Delete a clause mapping when it is no longer required for the skill.

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Result

Now Assist uses the updated clause mappings to display suggestions for non-standard or missing clauses in a contract document.

Related topics

Map a field group to a clause

Manage expected response mappings for contract analysis

Manage expected response mappings for contract analysis by updating the expected response for the fields of a use case, deactivating the mappings when not in use, or deleting them when no longer required.

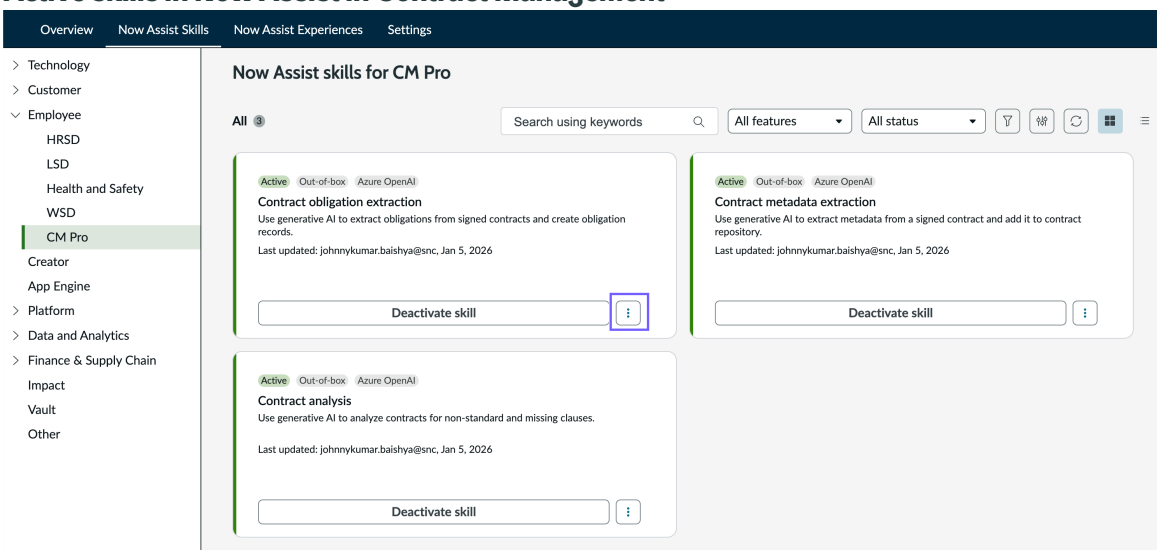
Before you begin

Role required: sn_cm_gen_ai.ai_contract_config, sn_cm_contract_config

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. On the **Contract analysis** tile, select **Edit** in the options menu (⋮).

Active skills in Now Assist in Contract Management



4. In the skill guided setup, select **Expected response mappings**.
5. Select the actions icon ⋮ on the expected response mapping that you want to update, delete, or deactivate.

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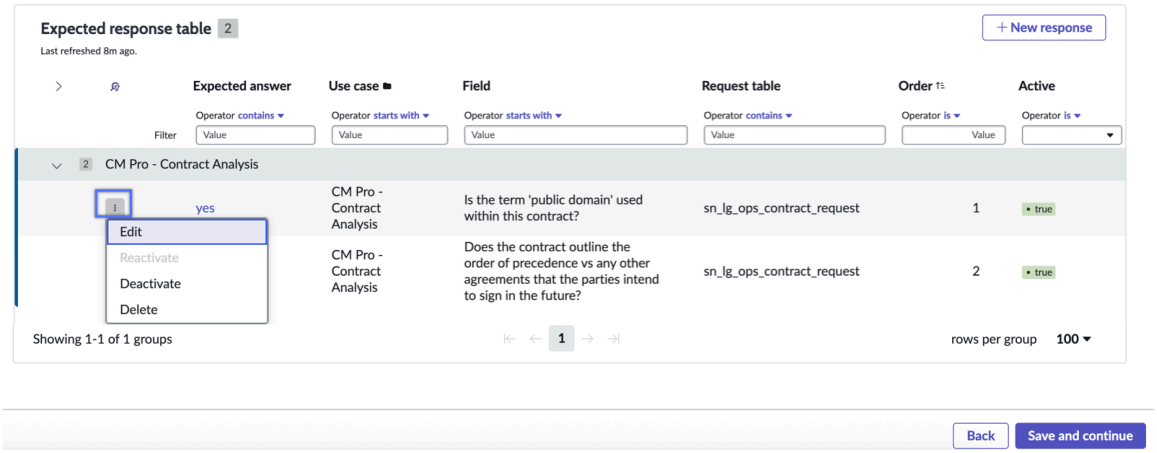
Expected responses for contract analysis fields



Edit

Update the expected response for the fields of a use case.

For more information on clause mapping, see Map a field to an expected response.

Deactivate

Deactivate an expected response mapping to temporarily make it unavailable for the skill.

The **Reactivate** options appears when a expected response mapping is deactivated. Use this option to activate a expected response mapping.

Delete

Delete an expected response mapping when it is no longer required for the skill.

Result

Now Assist uses the updated response mappings to identify non-standard clauses in a contract document.

Related topics

Map a field to an expected response

Deactivate skills for Now Assist in Contract Management

Deactivate the skills in Now Assist in Contract Management when they are not in use.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_admin

Procedure

1. Navigate to **All** > **Now Assist Admin** > **Skills** to access the **Now Assist Skills** tab of the Now Assist Admin console.
2. Navigate to **Employee** > **CM Pro**.
3. On the Contract Management Pro card, select **View details**.
4. On the tile of your skill that you want to deactivate, select **Deactivate skill** in the options menu (⋮).

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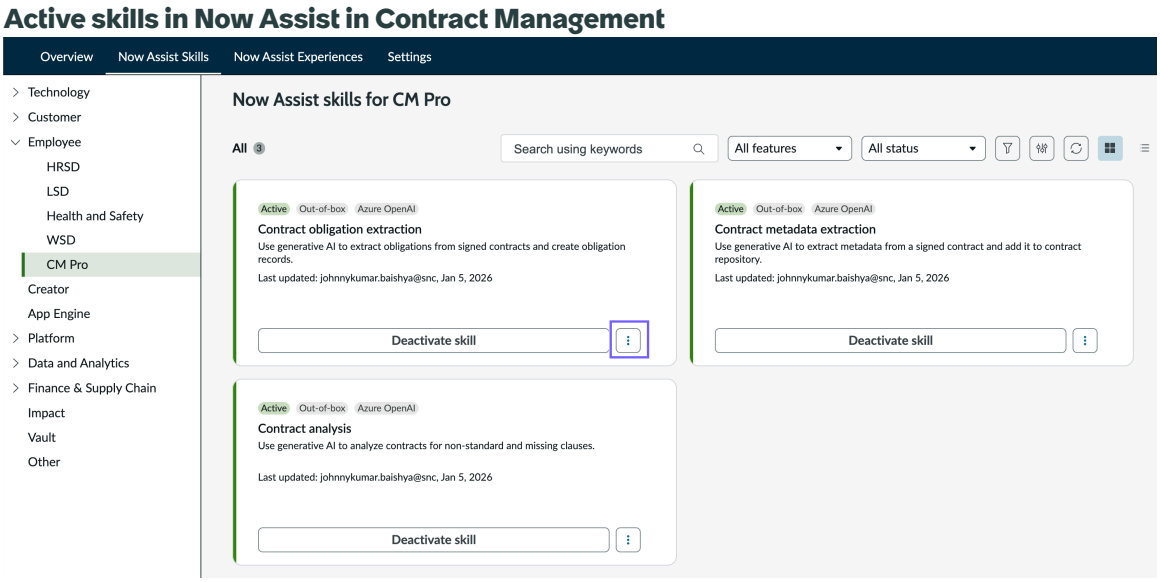

5. In the pop-up messages, select **Deactivate**.

Result

The skill is deactivated for Now Assist in Contract Management and displayed in the **All available Contract Management Pro skills** section.

To reactivate the skill, select **Activate skill**. For more information, see Configure Now Assist in Contract Management.

Using Now Assist in Contract Management

If you have the sn_cm_gen_ai.ai_contract_fulfiller role, you can review the non-standard and missing clauses in a contract, extract the information from a signed contract to add it to the contract repository and search using natural language by using the Now Assist in the Contract Management application.

Contract metadata extraction using Now Assist in Contract Management

As a contract fulfiller, use Now Assist in Contract Management Pro to extract metadata from a signed contract and add the information to the mapped fields in the contract repository.

You can review the extracted information and make necessary corrections on the Document Intelligence workspace before adding the information to the contract repository. On completion of the extraction process, the **Extraction results** tab opens on the contract repository record displaying the status of the extracted metadata.

Metadata extraction workflow for a contract fulfiller

The following end-to-end workflow shows how a contract manager extracts metadata from a signed contract and adds the information in contract repository.

1. The contract repository record is created once the signed contract is attached to the contract request.
2. A contract manager with the appropriate role (sn_cm_gen_ai.ai_contract_fulfiller) initiates metadata extraction in the contract repository record.

   The metadata extraction is automatically initiated on creation of the contract repository record, if the automatic extraction process is enabled in system properties. For more information, see Configure system properties for contract metadata extraction.

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3. The contract manager receives a notification once the metadata extraction is successfully completed.

   Note: The *Metadata extraction - Completed* notification as is not active by default.

4. The contract manager selects the **Review extracted metadata** button to view the extracted information in the Document Intelligence workspace.
5. The contract manager submits the verified information to update it in the contract repository.
6. When the extraction process is completed, the **Extraction results** tab opens on the contract repository record displaying the status of the processed information.

Initiate metadata extraction from a contract

Use generative AI capabilities to extract metadata from a signed contract attached in a contract repository record.

Before you begin

Ensure that Now Assist has data access or your role. For more information, see Configure data permissions for Now Assist skills.

Role required: sn_cm_gen_ai.ai_contract_fulfiller

About this task

You can also configure the system properties to automatically initiate the metadata extraction process once the contract repository record is created. For more information, see Configure system properties for contract metadata extraction.

Note: Contract metadata extraction using generative AI capabilities is not available when the Manage contract repository agentic workflow is enabled.

Procedure

1. Open a contract repository record where you want to extract information from a contract.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon ( ). **c.** Select **Executed contracts**. **d.** Select **All**. **e.** Select the contract repository record.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open a contract request that is in the Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Select the contract repository record.

2. Select **Initiate metadata extraction**.

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A message appears stating that the metadata extraction process has been initiated. You receive an email notification when the process is completed.

The **Review extracted metadata** button appears on initiating the metadata extraction. You can select the button after the metadata extraction is completed.

What to do next

Work with extracted metadata

Work with extracted metadata

Review the metadata extracted from a contract and add it to the contract repository.

About this task

After the metadata extraction process is completed, you can review and modify the values of the extracted fields in the Document Intelligence workspace before submitting it to update mapped fields in the contract repository.

Before you begin

The metadata extraction process must be completed.

Role required: sn_cm_gen_ai.ai_contract_fulfiller

Procedure

1. Open a contract repository record where you want to review extracted information.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon ( ). **c.** Select **Executed contracts**. **d.** Select **All**. **e.** Select the contract repository record.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open a contract request that is in the Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Select the contract repository record.

2. Select **Review extracted metadata**.
   The Document Intelligence workspace opens on a different tab displaying the extracted information.

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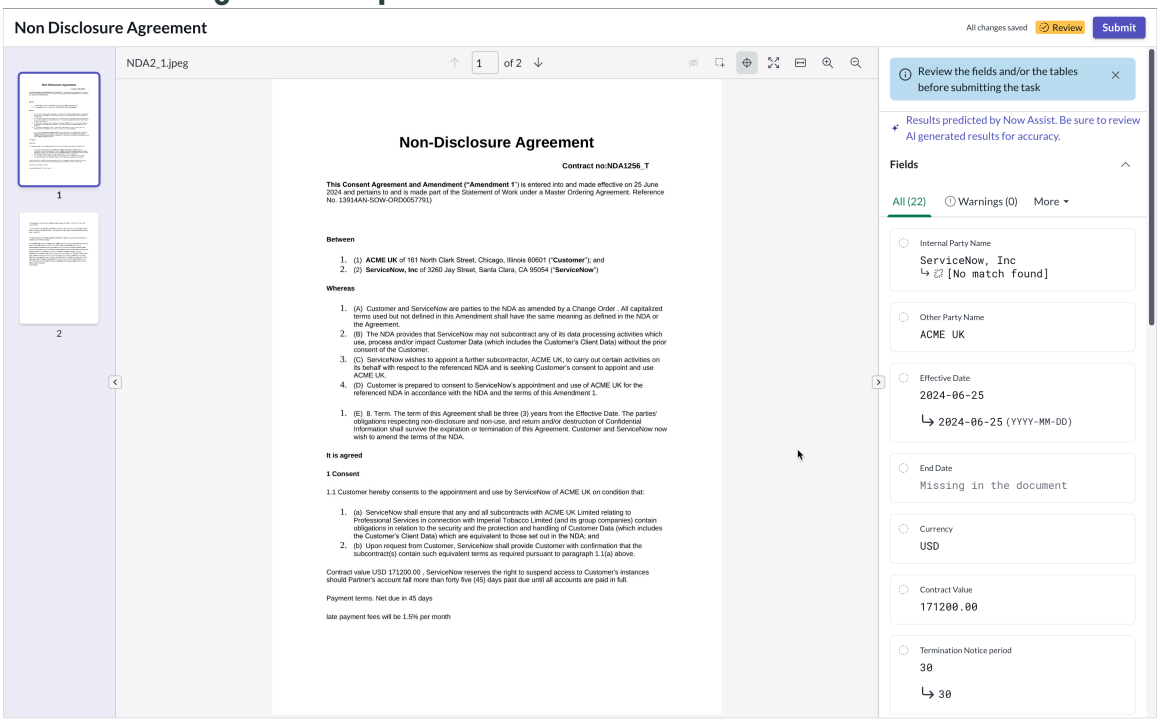
Document Intelligence workspace



3. Review the extracted information.
4. Enter the value in the extracted fields that are empty.
5. **Optional:** Update the extracted information for the fields with incorrect information.

    a. Select the field.

    b. For text fields, enter the correct value.

    (Optional) The value is automatically saved.

    c. For reference fields, select **Edit**, search for the correct value in the **Matched to** field, and then select **Save**.

    d. For date fields, select **Edit**, select the date, and then select **Save**.

    e. Enter a new value or select a value from the list of available options.

    f. Select **Save**.

6. Select **Submit**.

Result

The information is submitted to be added to the mapped fields in the contract repository. When the extraction process is completed, you can view the status of the extracted fields in the **Extraction results** related list in the contract repository record. For more information on the status of the fields, see Metadata extraction results.

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Metadata extraction results

The Extraction results tab in the contract repository record displays the processed metadata and their statuses, indicating whether the metadata have been successfully added to the mapped fields in the contract repository.

Metadata extraction statuses

Status	Description
Successful	Metadata has been successfully added to the mapped field in contract repository.
Failed - Access denied	The contract fulfiller performing the metadata extraction does not have the write access to update the field in contract repository.
Failed - Field not mapped	The extracted metadata is not mapped to any contract repository field.
Failed - Invalid value	The extracted metadata does not match the expected format or type for the mapped contract repository field. For example, a contract repository field expects an integer, but the extracted value is not a numeric value.
Failed - Processing error	The extracted metadata for the mapped field violated a business rule on the repository, leading to the process being aborted.

Contract analysis using Now Assist in Contract Management

As a contract fulfiller, you can analyze your contract documents and identify non-standard or missing clauses from the Now Assist contextual side panel by using the Now Assist in the Contract Management application.

You can analyze an entire document and identify any non-standard or missing clauses by the Now Assist in Contract Management application. With Now Assist in Contract Management, your organization can save time and effort by reducing the need for manual review.

Note: Be sure to review the AI-generated analysis for accuracy.

By using the Now Assist in Contract Management application, your organization can follow a workflow that moves through a series of states, which are displayed in the contract request. For more information on the states of the document during Now Assist analysis, see Contract analysis states in Now Assist in Contract Management.

Analyze a contract document

Analyze a contract document with generative AI to identify non-standard and missing clauses. You can do this task by using the Now Assist in Contract Management application.

Before you begin

Ensure that Now Assist has data access for your role. For more information, see Configure data permissions for Now Assist skills.

Role required: sn_cm_gen_ai.ai_contract_fulfiller

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About this task

- As an assigned-to collaborator or group manager with the sn_cm_gen_ai.ai_contract_fulfiller role, you can initiate a Now Assist analysis for a contract document when the contract request is in the Work in progress state.
- The Now Assist analysis is run on the latest revision of the contract document.
- Only documents in Microsoft Word (.docx) and PDF formats can be analyzed with the Now Assist application. For more information on the document limitations, see Limitations in Document Intelligence.
- For contract documents that are in a PDF format, you can run the Now Assist analysis but you can't act on a suggestion.

Note: Be sure to review the AI-generated analysis for accuracy.

Procedure

1. Open the contract request from the workspace that you're using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon. **c.** Select **Contract requests** > **All**. **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. If the contextual side panel isn't open, select the Now Assist Review for contracts icon. You can analyze contracts in the Now Assist contextual side panel as shown in the following example.

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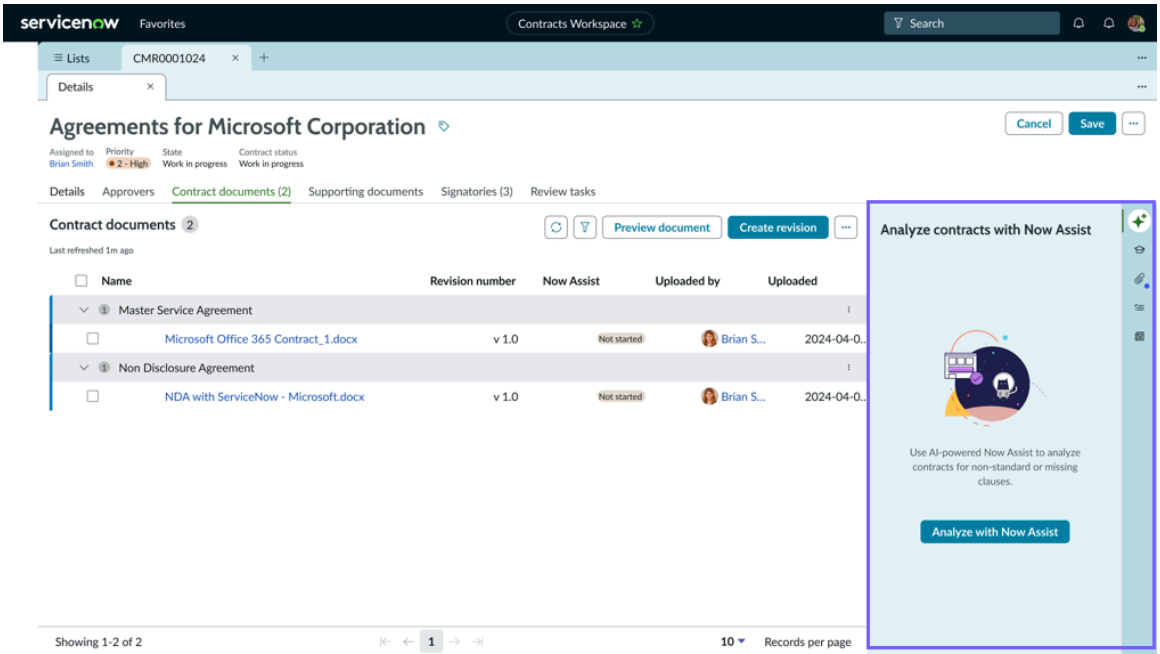

3. On the contract request page, select **Contract documents**.
4. Submit contract documents for Now Assist analysis.
   The latest versions of the documents are automatically selected for analysis.

Method	Steps
Run Now Assist analysis on a single contract document	**a.** On the **Contract documents** tab, select a contract document. **b.** From the contextual side panel, select **Analyze with Now Assist**.
Run Now Assist analysis on multiple contract documents	**a.** After opening a contract request, from the contextual side panel, select **Analyze with Now Assist**. **Note:** A list of contract documents that were submitted for the Now Assist analysis is displayed. Information about the documents and any errors that were found are also included. **b.** Select **Analyze contract**.

   a. The Now Assist application creates a copy of the documents and starts analysis on the new documents. The contract analysis state is now Analysis in progress.
   b. A card is created for each document in Analyzed contracts with the Now Assist contextual panel. The contract status updates to the Awaiting review.
   c. When the analysis of the documents is complete, the state changes to Ready for review with the following details:

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State of the action taken on the contract analysis suggestions

Section	Description
Pending reviews	Displays the number of deviations reported and pending for review.
Completed	Displays the number of reviewed deviations that have been reviewed and any actions taken.

5. Select the document card to view the details of the analysis.
   The details of the contract analysis are displayed with the Now Assist comments. The comments explain the reasons for marking a clause non-standard.
6. **Optional:** Review the Now Assist suggestions and provide feedback to help improve the accuracy of Now Assist contract analysis over time.

   a. For each suggestion, select the thumbs up icon if the suggestion is helpful or the thumbs down icon if the suggestion is not helpful.

   b. **Optional:** In the pop-up, select the options that best describe your experience.
   You can select multiple options and add optional comments.

   c. Select **Submit**.

   The feedback is captured in the Contracts Gen AI Feedback [sn_cm_gen_ai_feedback] table.
7. Go to the analyzed contracts in the Now Assist contextual side panel by selecting **Back**.
   You can only view the suggestions in the contextual side panel. To act on a suggestion, open a .docx Microsoft Word document and use the Microsoft Word add-in for ServiceNow Contracts. For more information, see Review the Now Assist suggestions for clause deviations.

Review the Now Assist suggestions for clause deviations

Review the Now Assist suggestions for clause deviations and take actions by using the Now Assist in Contract Management application to ensure that the clauses comply with the guidelines of the company.

Before you begin

Before you start to review a document, make sure that the document has been analyzed by the Now Assist application. For more information, see Analyze a contract document.

Role required: sn_cm_gen_ai.ai_contract_fulfiller

About this task

A clause is a section in a contract document that outlines the guidelines of the company agreement, such as the purpose, term, or confidentiality.

- As an assigned-to collaborator or group manager with the sn_cm_gen_ai.ai_contract_fulfiller role, review and act on the suggestions from the contract analysis when the contract request is in the Work in progress state.
- The Microsoft Word add-in for ServiceNow Contracts isn't supported when the document is opened from the Google Drive. If you're using Google Drive for external storage, you must download the document from Google Drive and work on it offline.

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- If you're using the Microsoft OneDrive configuration for external storage, you can work on the document online or download it to work on it offline.
- If you work on the suggestions offline, you must upload the document manually by creating a revision in the contract request. For more information, see Create a document revision.

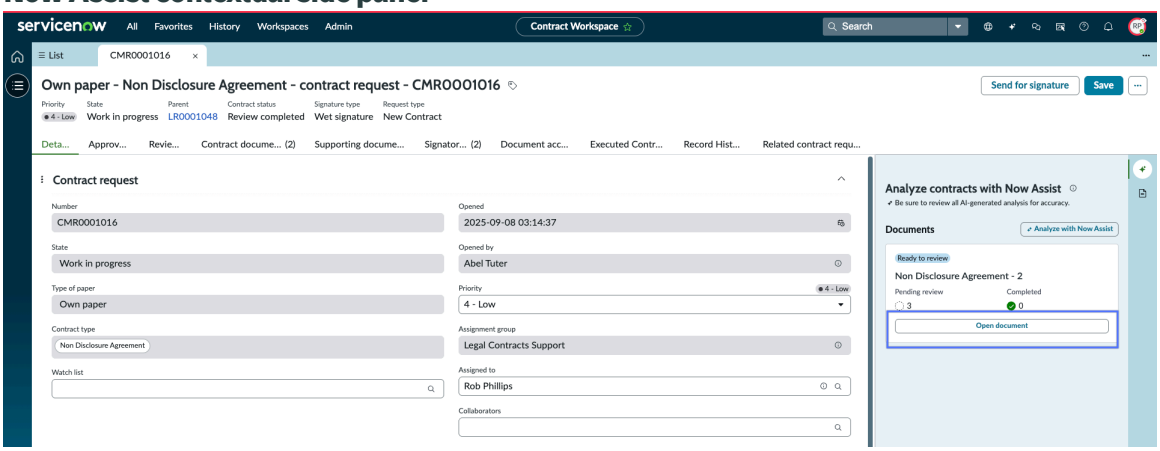
Procedure

1. Open the contract request from the workspace that you're using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon . **c.** Select **Contract requests** > **All**. **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. Select **Contract documents**.
3. If the contextual side panel isn't open, select the Now Assist Review for contracts icon .
4. From the document card, select **Open document**.

Now Assist contextual side panel



Depending on the internal or external storage configuration the document is downloaded into your system or opened online.

Contract document downloads for internal or external storage

Storage	Result
Internal storage	The document is downloaded to your local system.
External storage:	The document opens online from the external storage.

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Storage	Result
a. Microsoft OneDrive **b.** Google Drive	

5. Open the contract document depending on your storage configuration.
   - Internal storage: Open the downloaded document from your system to work on it offline.
   - Microsoft OneDrive: Open the document online, or download the document to work on it offline.
   - Google Drive: Download the document and open it offline.

   If you worked on the contract document offline, you must upload the document manually by creating a revision. For more information, see Create a document revision.
6. Review the Now Assist suggestions.

   a. From the Microsoft Word ribbon, select the ServiceNow Contracts add-in.
   For more information, see Configure the Microsoft Word add-in for ServiceNow Contracts.

   b. Log in by entering the legal fulfiller credentials.
   The ServiceNow Contracts add-in displays the tabs as listed in the following table.

Word Add-in tabs

Section	Description
Review analysis	▪ **Pending reviews**: Lists all the non-standard clauses and missing clauses. ▪ **Completed**: Lists all the completed actions over the clause.
Clause library	Lists all the standard clauses that are active for the contract type that the document belongs to.

   c. On the **Review Analysis** tab, select **Pending reviews** to review the Now Assist suggestions.

7. Work on a clause that is tagged as non-standard.

   a. On the **Pending reviews** tab, select the clause card that is tagged as **non-standard**.
      - Microsoft Word navigates to the clause that is associated with the clause card.
      - The following suggestions are displayed in the card:
        - Now Assist comment: Now Assist feedback depending on the clause and the expected responses.
        - Standard clause suggestion: Standard clause content suggestion from the clause library.
        - Show more/less: Option to expand or collapse the text.
        - Thumbs up and Thumbs down icons to capture the feedback.

   b. Accept or ignore the Now Assist suggestion.

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Action	Steps
Replace the non-standard clause	○ Select the clause content in the document that must be replaced. ○ Select **Use this clause**.
Ignore suggestion	Select **Ignore**.

8. Work on a clause that is tagged as missing.
   a. On the **Pending reviews** tab, select the clause card that is tagged as non-standard.
   b. Accept or ignore the Now Assist suggestion.

Action	Steps
Add missing clause	Select **Use this clause**.
Ignore suggestion	Select **Ignore**.

9. Review the remaining non-standard and missing clauses and act as required.
   As you review the clauses and take action, they're moved to the **Completed** tab with the details of the action taken.
10. **Optional:** Provide feedback to help improve the accuracy of Now Assist contract analysis over time.
    a. For each suggestion, select the thumbs up icon if the suggestion is helpful or the thumbs down icon if the suggestion is not helpful.
    b. **Optional:** In the pop-up, select the options that best describe your experience.
    You can select multiple options and add optional comments.
    c. Select **Submit**.

    The feedback is captured in the Contracts Gen AI Feedback [sn_cm_gen_ai_feedback] table.
11. Add a clause from the clause library.
    a. Select the **Clause library** tab.
    b. Search the clause by using the clause name.

       The active clauses for the contract type that is associated with the contract document are displayed.
    c. Select the clause in the library.
    d. Place the cursor on the document where you want to add the clause.
    e. Select **Use this clause**.

    The clause is added to the document. When a valid metadata mapping exists within the clause content, the metadata gets auto-populated. Otherwise, a content control tag name is added

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and the metadata must be manually updated. For more information, see Configure metadata for fields, variables, and variables sets in a contract document.

12. Mark the review as complete.

    a. Select **Mark as complete**.

    b. Mark the review as complete by selecting **Yes**.
    Continue working on the suggestions by selecting **Cancel**.

- The review is marked as complete and the file is updated in the configured storage.
- After the review is marked complete, you can't take any further actions even if there are pending reviews.
- The Contract request state is Work in progress and the Contract status is updated to Review completed.

Note: If you download the document to work on it offline, you must upload the document manually by creating a revision. For more information, see Create a document revision.

Cancel a Now Assist contract analysis

Cancel a Now Assist contract analysis when it's no longer required due to a change in business requirements.

Before you begin

You must have started the contract analysis with Now Assist. For more information, see Analyze a contract document.

Role required: sn_cm_gen_ai.ai_contract_fulfiller and sn_lg_cnt.contract_fulfiller

About this task

You can cancel an analysis for a contract document or for all contract documents by canceling the contract request.

Procedure

1. Open the contract request from the workspace that you're using.

Method	Steps
Contract Workspace listing	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon ( ). **c.** Select **Contract requests** > **All**. **d.** Select a contract request.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open the list that displays the contract re quests. **c.** Select a contract request.

2. Cancel the contract analysis for a contract document or all documents in a contract request.

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Method	Steps
Cancel contract analysis for a document	**a.** Select the **Contract documents** tab. **b.** On the document card in the Now Assist contextual panel, select **Cancel**. **c.** Cancel the contract analysis by selecting **Yes, Cancel**.
Cancel contract analysis for all the documents in a con tract request	**a.** Select the More Actions  icon. **b.** Select **Cancel request** **c.** Confirm the cancellation by selecting **Cancel Request**.

Result

The contract analysis is canceled.

- If a contract analysis for a specific contract document was canceled, the Now Assist analysis status for the document version is updated to Canceled.
- If a contract analysis for all the contract documents under analysis is canceled, the Now Assist analysis status is updated to Canceled for any pending analysis. For contract documents that are already analyzed, the status remains as Completed.
- The contract request state is Work in progress.
- A cancellation email notification is sent to the contract fulfiller, group manager, and collaborator.

Contract analysis states in Now Assist in Contract Management

The Now Assist in Contract Management analysis follows a workflow and moves through a series of states, which are displayed in the contract request. The contract analysis details are available in the activity stream and are also communicated by an email notification to the contract fulfiller, contract collaborator, and assignment group manager.

The following table describes the different states that a document goes through during analysis by the Now Assist application in the **Contract documents** tab.

State displayed in the Contract document tab of the contract request

State	Description
Not started	Now Assist analysis hasn't been requested for the version.
Analysis in progress	Now Assist analysis is in progress.
Ready to review	Now Assist analysis is complete and suggestions are ready for review.
Completed	Now Assist analysis suggestions are reviewed and marked as complete.
Canceled	Now Assist analysis was canceled.
Error	Error occurred when initiating or executing the Now Assist analysis.

The following table describes the status of the documents in the Analyze contracts with Now Assist pop-up window.

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Status displayed for each of the contract documents in the Now Assist pop-up window

State	Description
Ready to analyze	Latest version of the contract document is ready for contract analysis.
Not configured	Configuration is missing for the contract type that is associated with the contract document.
File type error	File type of the contract document isn't supported.
Analysis in progress	Now Assist analysis is in progress.
Error	Error occurred while evaluating the details for the contract analysis.

Using agentic workflows in Now Assist in Contract Management

Use agentic workflows in Contract Management Pro to extract metadata and obligations from signed contracts, and set reminders for contract renewals or termination.

Available agentic workflows for the Contract Management Pro AI agent collection

Agentic workflow name	Description	Available AI agents
Manage contract repository	Uses an AI agent to extract key metadata and obligations from a signed contract, and calculate the contract reminder date by analyzing the contract end date, auto-renewal clause, and notice period for contract renewal or termination. The playbook in the contract record enables users to review AI extracted metadata and obligations to update the contract repository with extracted metadata, and create obligation records, respectively. Users can also set reminders for contract renewal or termination. **Note:** The agentic workflow is triggered in the Now Assist panel. It is not supported in the Virtual Agent panel.	Contract repository AI agent

Important: By default, all agentic workflows and AI agent records are read only.

To modify an agentic workflow, you must first duplicate it, and then update it. For more information, see:

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- Duplicate an agentic workflow
- Create an agentic workflow
- Modify an agentic workflow

Note: When you modify an agentic workflow, AI agents, or tools, make sure that you update all instructions accordingly.

If you have customized the manage contract repository agentic workflow, update the script include to run it autonomously.

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

You can use Now LLM Service, Now LLM Long Term Stable models (LTS), Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all Now Assist skills and AI agents. Use the Configuration Controls in AI Control Tower to define which options are available, then set the skill-level preferences in the Now Assist Admin console. For more information, see Large language models on the ServiceNow AI Platform®.

Manage contract repository agentic workflow

Use the manage contract repository agentic workflow to improve productivity by extracting metadata and obligations automatically from signed contracts and setting the contract reminder dates for contract renewal or termination.

Manage contract repository overview

Important:

- To use the agentic workflow for your workspace, your role must be configured to use the agentic workflow, and the data access permissions must be set for the AI agents and the agentic workflow.

  For more information, see Configuring user access and data permissions for agentic workflows and Configuring user access and data permissions for AI agents.

- The data access permissions must be set for the Now Assist skills, contract metadata extraction, and contract obligation extraction.

  For more information, see Configure data permissions for Now Assist skills.

- To run the AI agents autonomously, ensure that the business rules for the agentic workflow are activated. For more information, see Activate business rules for the Manage contract repository agentic workflow.

  If you have customized the manage contract repository agentic workflow, make sure to update the script include to run it autonomously. For more information, see Update the contracts AI agents handler script include.

- To view the agentic workflow in the Now Assist panel, turn on the Now Assist panel. For more information, see Turn on the Now Assist panel.

The manage contract repository agentic workflow uses an AI agent to do the following sequentially.

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- Extract metadata from signed contracts.
- Calculate the contract reminder date for renewal and termination.
- Extract obligations from signed contracts.

Metadata extraction and contract reminders

The AI agent uses Now Assist contract metadata extraction skill to extract key metadata from signed contracts. Once the metadata extraction is complete, you can open the playbook to review the extracted information and set the contract reminder date.

The following workflow explains the metadata extraction and contract reminder setup process.

1. As a Contract Admin with the AI role, activate the contract metadata extraction skill in the Now Assist Admin console.

   For more information, see Configure Now Assist in Contract Management.

2. As a Contract Admin, activate the business rules.
3. The metadata extraction process is automatically initiated when a contract record is created.
4. Once the extraction is complete, the Contract Manager with the AI role receives a notification indicating that the metadata is ready for review.
5. The Contract Manager reviews the extracted metadata and submits it to update the contract repository.
6. The contract reminder date is then calculated based on the following factors:
   - Contract end date
   - Presence of auto-renewal clause
   - Notice period for contract renewal or termination

   Note: If the renewal notice period and termination notice period aren't available, it uses the configured default notice period. For more information, see Set the default notice period for the Manage contract repository agentic workflow.

7. The Contract Manager sets the contract reminders in the playbook by reviewing the calculated date and configuring the recipient list for the reminders.

For more information, see Review AI-extracted metadata and contract reminder date.

Obligation extraction

The AI agent uses Now Assist contract obligation extraction skill to extract key contractual obligations from contracts. Once extracted, you can review the obligations within the contract playbook and choose to accept or reject them. Accepted obligations are added as records in the **Obligations** tab of the contract record.

The following workflow explains the obligation extraction process.

1. As a Contract Admin with the AI role, activate the contract obligation extraction skill in the Now Assist Admin console.

   For more information, see Configure Now Assist in Contract Management.

2. As a Contract Admin, activate the business rules.
3. The obligation extraction process is automatically initiated when a contract record is created.

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4. Once the extraction is complete, the Contract Manager with the AI role receives a notification indicating that obligations are ready for review.
5. The Contract Manager reviews the extracted obligations within the contract playbook. Each obligation can be accepted or rejected based on relevance.
6. Approved obligations are automatically added as obligation records in the **Obligations** tab of the contract record.
7. Obligation tasks are created.
   - For a recurring schedule, the obligation tasks are automatically created for the obligation record based on the defined schedule.
   - For an ad hoc schedule, the contract manager creates an obligation task from the **Obligation tasks** tab in the contract record.
8. The assigned user is notified when the obligation task is created.
9. The assigned user works on the obligation task and submits it for review.

   The state of the obligation task changes from Open to Awaiting approval.
10. The Obligation Fulfiller reviews the task and approves or rejects it.
    - If the obligation task is rejected, the state of the task changes to Open, and the assigned user continues to work on it.
    - If the obligation task is approved, the state of the task changes to Completed.

For more information, see Review AI-extracted obligations.

Conditions for the agentic workflow to trigger

The manage contract repository agentic workflow for a non-self-served request is triggered as soon as the contract repository record is created and the Assigned to user in the request has the sn_cm_gen_ai.ai_contract_fulfiller and now_assist_panel_user role.

The manage contract repository agentic workflow for a self-served request is triggered as soon as the contract repository record is created and the following conditions are met:

- The group manager of the Assignment group has the now_assist_panel_user role.
- If there's no group manager for the Assignment group, one of the users in the Assignment group has the now_assist_panel_user role.
- If the user requested changes on the contract request, the Assigned to user or the group manager in the request has the sn_cm_gen_ai.ai_contract_fulfiller and now_assist_panel_user role.

Contract fulfillers and assignment group managers with the now_assist_panel_user role can view the agentic workflow conversation in the Now Assist panel.

Note: The agentic workflow isn't supported in the Virtual Agent panel.

Accessing the agentic workflow

Role required: sn_aia.admin

If your generative AI service provider isn't Now LLM Service, ensure that the API connections and credentials are configured. For more information, see Configuring API credentials for generative AI capabilities.

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1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Manage contract repository**.

AI agents used in the manage contract repository agentic workflow

AI agents names and descriptions

Name	Description
Contract Repository AI agent	Uses various tools to perform the following: • Retrieves the contract repository details, such as contract vendor, contract model, contract document's attachment ID, and so on from a specific contract repository record. • Extracts metadata from signed contact documents based on the applicable use case in the contract metadata extraction skill. • Extracts obligations from signed contact documents based on the applicable use case in the contract obligation extraction skill. • Calculates the average lead time for similar contracts.

Reviewing AI-extracted results in the playbook

The playbook in a contract repository enables you to review information extracted by the manage contract repository agentic workflow, and configure reminders for your contract renewals or terminations.

The manage contract repository agentic workflow extracts key metadata and obligations from signed contracts. After the extraction process is complete, you can open the **Playbook** tab in the contract repository to review the AI extracted results.

In the playbook, you can do the following:

- Review the metadata extracted from signed contracts, make necessary changes, and submit it to update the mapped fields of a contract repository.
- Review the AI calculated contract reminder date, adjust it if needed, and specify recipients who will receive notifications to either renew or terminate the contract.
- Review the obligations extracted from signed contracts, and edit, approve, or reject them to create obligation records in the contract repository.

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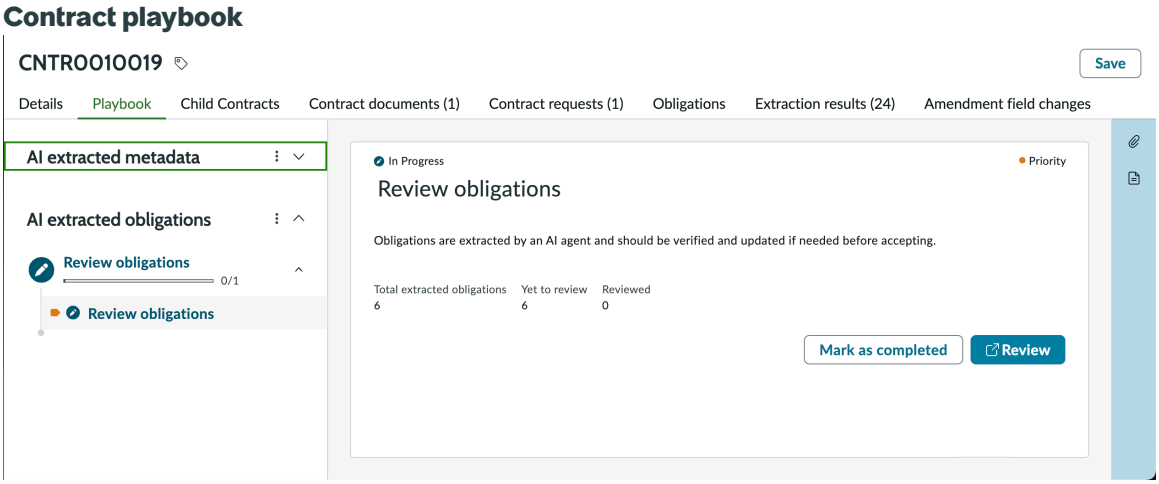

Review AI-extracted metadata and contract reminder date

Use the contract playbook to review and update the AI-extracted metadata and contract reminder date.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_fulfiller

About this task

The Manage contract repository agentic workflow uses AI agents to extract key metadata from signed contracts and calculate contract reminder date. The metadata is extracted based on the applicable use case in the Contract metadata extraction skill. After the extraction process is complete, a message appears on the contract record and an email notification is sent with a link to review the extracted metadata. Once you have reviewed and submitted the extracted metadata, the contract reminder date is calculated based on the contract end date, auto-renewal clause, and notice period for contract renewal or termination.

To receive notifications when AI agents complete metadata extraction, ensure that notifications are enabled by the system administrator. For more information, see Enable notifications for AI extracted metadata and obligations.

Procedure

1. Open a contract repository record where you want to review the extract information.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon ( ). **c.** Select **Executed contracts**. **d.** Select **All**. **e.** Select the contract repository record.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open a contract request that is in the Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Select the contract repository record.

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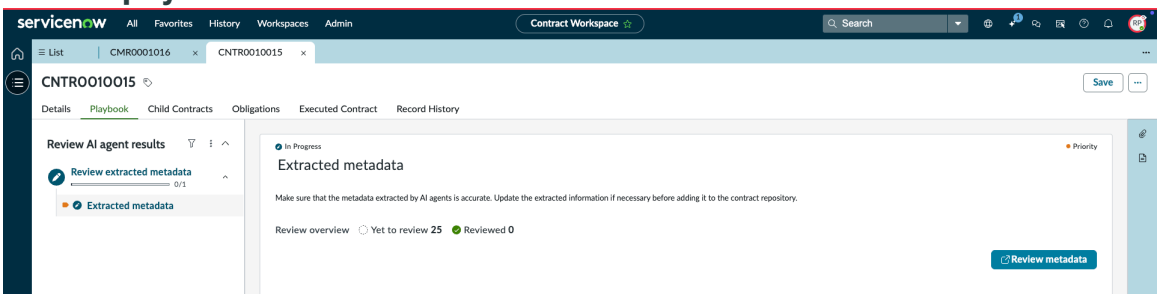
Method	Steps
Email notification	Select **Open playbook** in the email notification that you receive after the metadata extraction is complete.

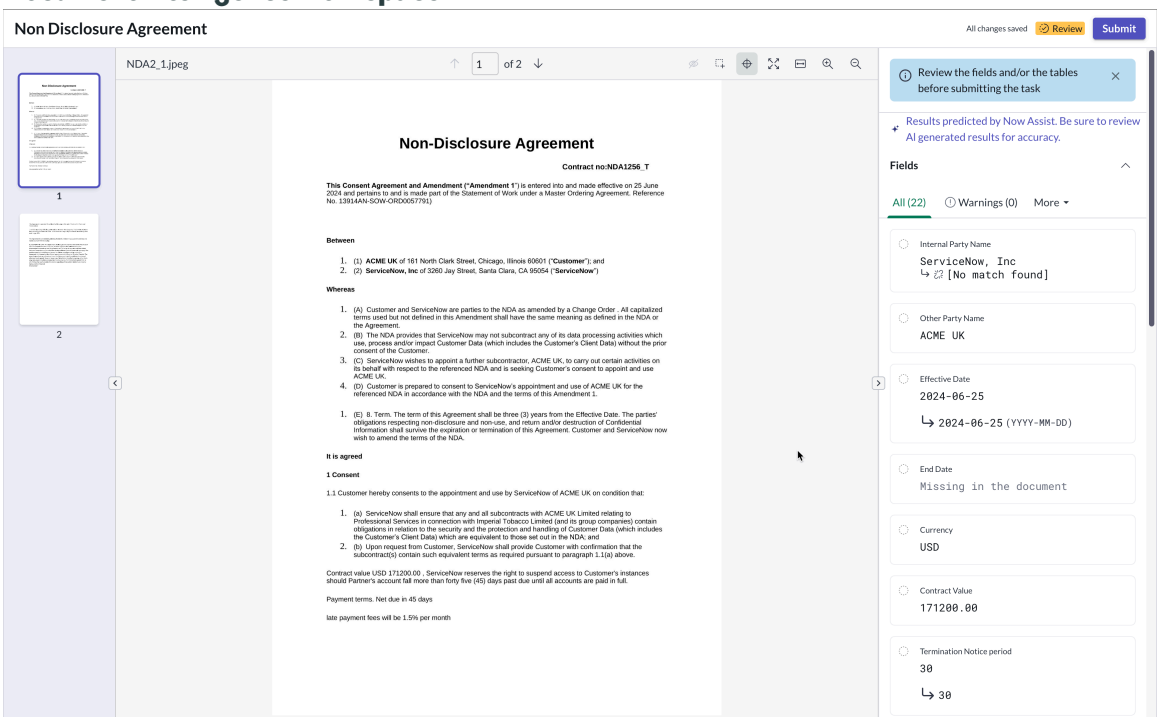
2. Select the **Playbook** tab.
   The playbook opens displaying a step-by-step interface to review the extracted metadata.

Contract playbook



3. Select **Review metadata**.
   The Document Intelligence workspace opens on a different tab displaying the extracted information.

Document Intelligence workspace



4. Review and update the extracted metadata.
   For more information, see Work with extracted metadata.
5. Select **Submit**.
   The reviewed metadata is added to the contract repository fields and the **Extracted results** tab opens on the contract repository record. For more information, see Metadata extraction results.
6. Select the **Playbook** tab.
   The playbook opens on the **Review contract reminders** step where you can review the AI calculated reminder date.

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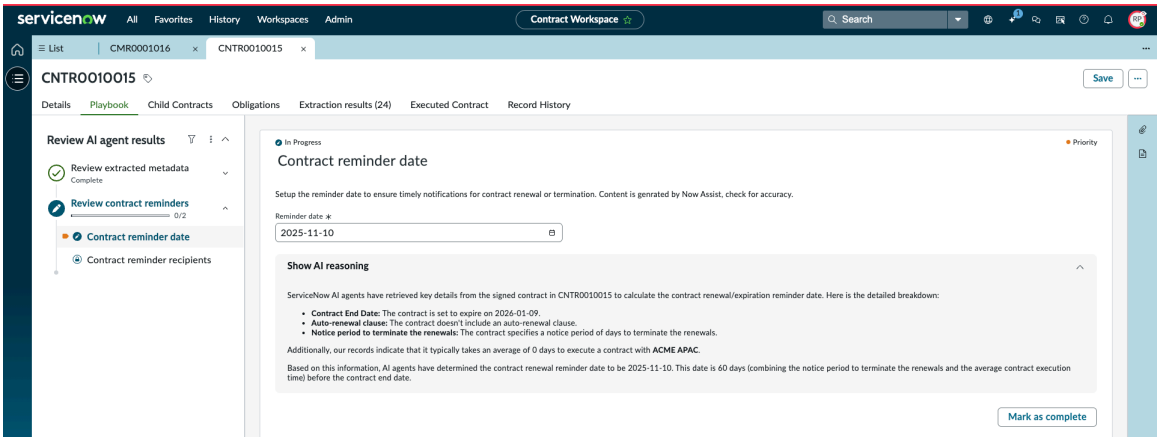
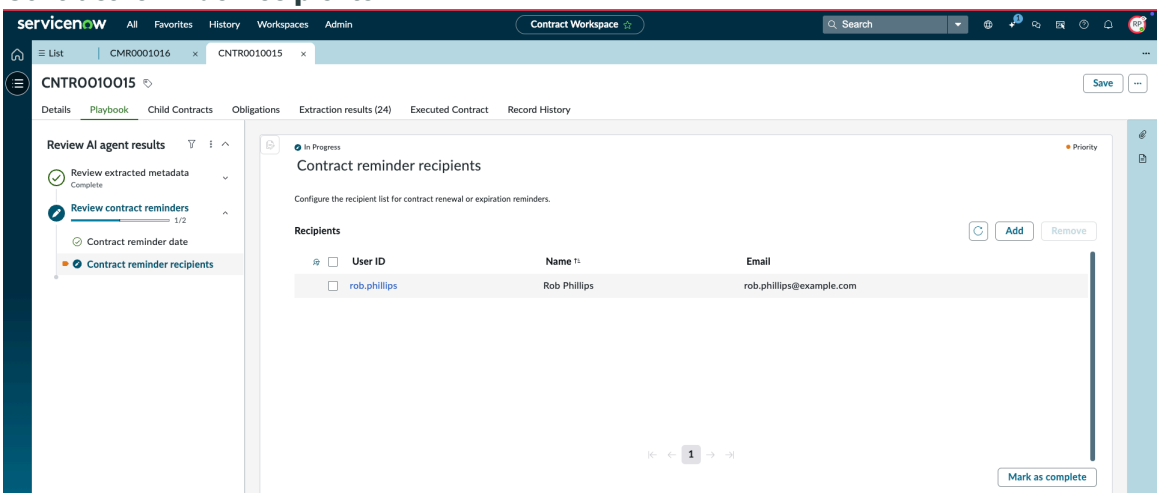
Contract reminder date



7. In the **Reminder date** field, modify the date, if necessary.
8. Select **Mark as complete**.
   The Contract reminder recipients page opens displaying the list of users who are already configured as recipients for the contract reminder.

Contract reminder recipients



9. Configure the recipient list.
   - To add a user, select **Add** and then enter the user name in the Add recipients window.
   - To remove a user, select the check box corresponding to the user name and then select remove.

   Note: At least one user is required in the recipient list.

10. Select **Mark as complete**.

Result

The contract reminder date is saved, and configured users will receive a notification on the specified date to remind them of upcoming contract renewal or termination actions.

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Related topics

- Manage contract repository agentic workflow
- Reviewing AI-extracted results in the playbook
- Configuring contract metadata extraction

Review AI-extracted obligations

Use the contract playbook to review, edit, approve, or reject obligations automatically extracted from contract documents. Approved obligations are added as obligations records in the **Obligations** tab of the contract repository.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_fulfiller

About this task

The manage contract repository agentic workflow uses AI agents to extract key contractual obligations from signed contracts. The obligations are extracted based on the applicable use case in the contract obligation extraction skill. After obligation extraction is complete, a message appears on the contract record and an email notification is sent with a link to review the extracted obligations. The playbook provides a step-by-step interface where you can review each obligation, make necessary edits, and decide whether to approve or reject it. Approved obligations are added as actionable records in the **Obligations** tab of the contract repository.

Procedure

1. Open a contract repository record where you want to review the extract information.

Method	Steps
Contract Workspace	**a.** Navigate to **All** > **Contract Workspace**. **b.** Select the list icon  . **c.** Select **Executed contracts**. **d.** Select **All**. **e.** Select the contract repository record.
Workspace used by your application	**a.** Navigate to your workspace. **b.** Open a contract request that is in the Closed complete or Contract signed state. **c.** Select the **Contract repository** tab. **d.** Select the contract repository record.
Email notification	Select **Review contract** in the email notification that you receive after the obligation extraction is complete.

2. Select the **Playbook** tab.
   The playbook opens displaying a step-by-step interface to review the extracted obligations.

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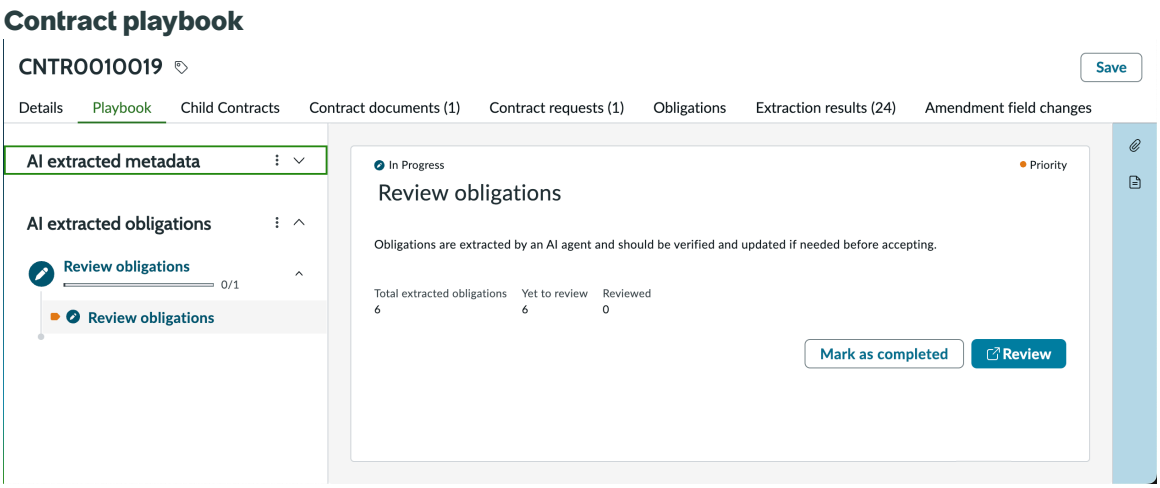
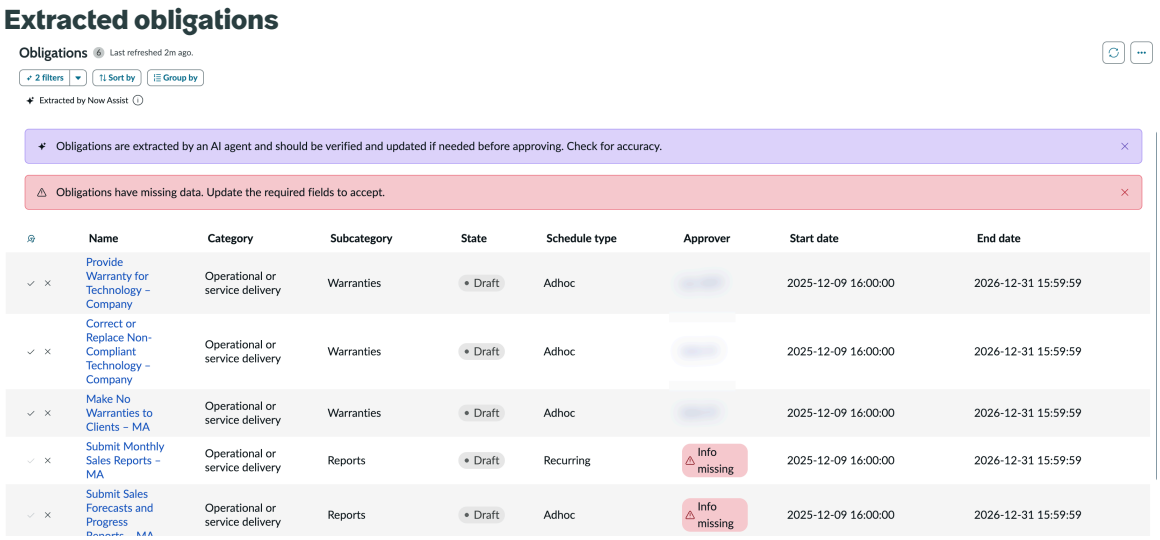


3. In the playbook, navigate to the **Review obligations** step under the AI extracted obligations section.
4. Select **Review**.
   The extracted obligations are displayed on a new tab.



5. Select an obligation to review the obligation details.
   - The **Details** tab displays the extracted obligation details. Use this tab to edit, approve, or reject the obligation.
   - The **Activity** tab displays a log of key attributes identified during the extraction process. Use this tab to review how the AI agent detected and populated the obligation, including the original text snippets and metadata extracted from the contract. The **Activity** tab helps you validate the extraction accuracy and provides transparency into the decision-making process for each obligation.

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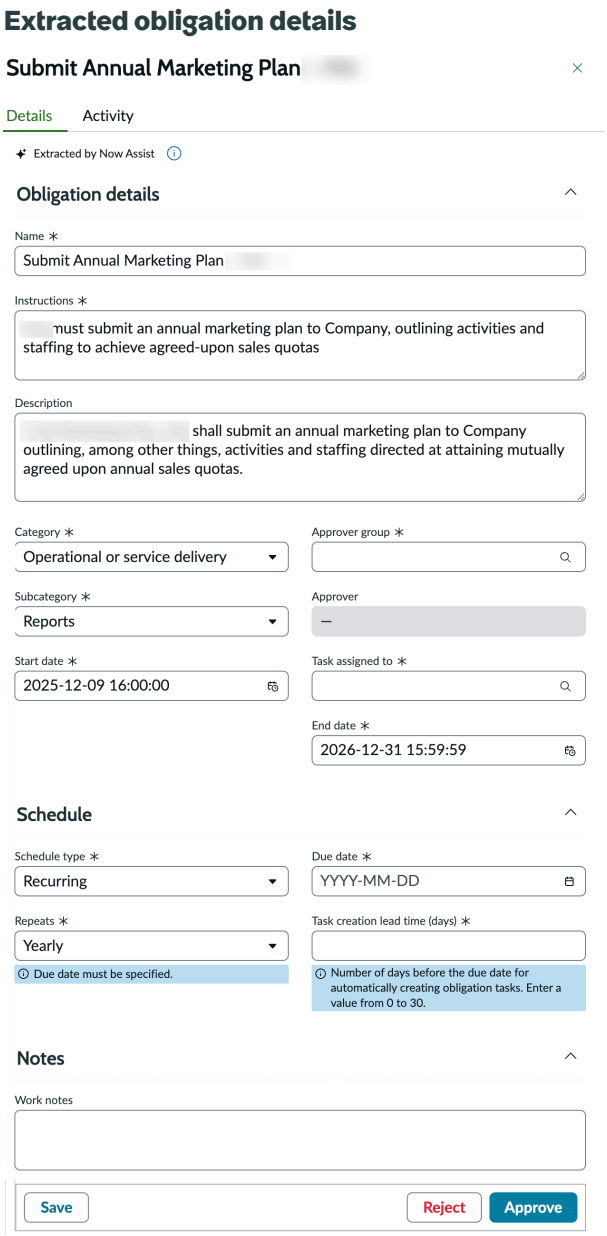

6. On the **Details** tab, perform the required action.
   - Edit the obligation details as needed.

     Note: Complete all required fields before saving the changes or approving the obligation.

     For more information on the fields, see Obligation form.
   - Select **Save** to save the changes.
   - Select **Approve** to approve the extracted obligation and add it as a record in contract repository.
   - Select **Reject** to reject the extracted obligation.

     Once an obligation is rejected, it's deactivated and can't be reactivated again. If you need to add the obligation later, you must create an obligation record manually. For more information, see Create obligation records.

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7. Repeat step 6 for all the extracted obligations.
8. Navigate to the **Playbook** tab in the contract repository after you have reviewed all the obligations.
9. Select **Mark as completed**.

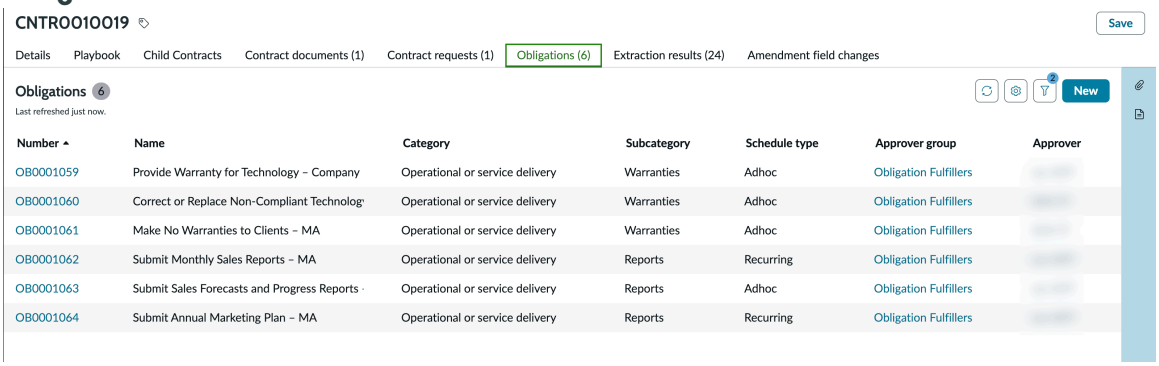
Result

Approved obligations are available as records in the **Obligations** tab of the contract repository. Rejected obligations are deactivated and excluded from further processing.

If the schedule of the obligation is recurring, the obligation tasks are automatically created based on the interval specified in the **Repeats** field.

If the schedule of the obligation is adhoc, you must create obligation tasks manually. For more information see, Create an ad hoc obligation task.

Obligation records



Related topics

- Obligation Management
- Obligation form
- Submit obligation tasks
- Cancel an obligation task
- Approve or reject obligation tasks
- Obligation Management notifications

Conversational contract search and insights Workflow

Configure conversational contract search and insights workflow to enable searching information in contracts using natural language and dialogue-driven queries, making it easier to find relevant information.

Conditions for the Agentic Workflow to trigger

The Conversational contract search and insights is triggered when you enter queries in the Now Assist panel.

Contract fulfillers and assignment group managers with the sn_cm_gen_ai.ai_contract_fulfiller and now_assist_panel_user role can view the agentic workflow conversation in the Now Assist panel.

Note: The agentic workflow isn't supported in the Virtual Agent panel.

Conversational query supports the following types of searches:

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- Queries related to contract metadata. Example: List all contracts for the vendor Acme. Vendor is a metadata associated with the contract.
- Queries related to clauses within contract documents. Example: List contracts that have a Confidentiality clause.
- Combined queries related to fields in the contract AND clauses within the contract document. Example: List contracts for Acme vendor with Confidentiality clause.
- Summarization and Q&A on contract documents. Example: Summarize the contract CNTR21002.

Search in contracts document

Ask question in the Now Assist panel to search for information in the content of the contract document.

Before you begin

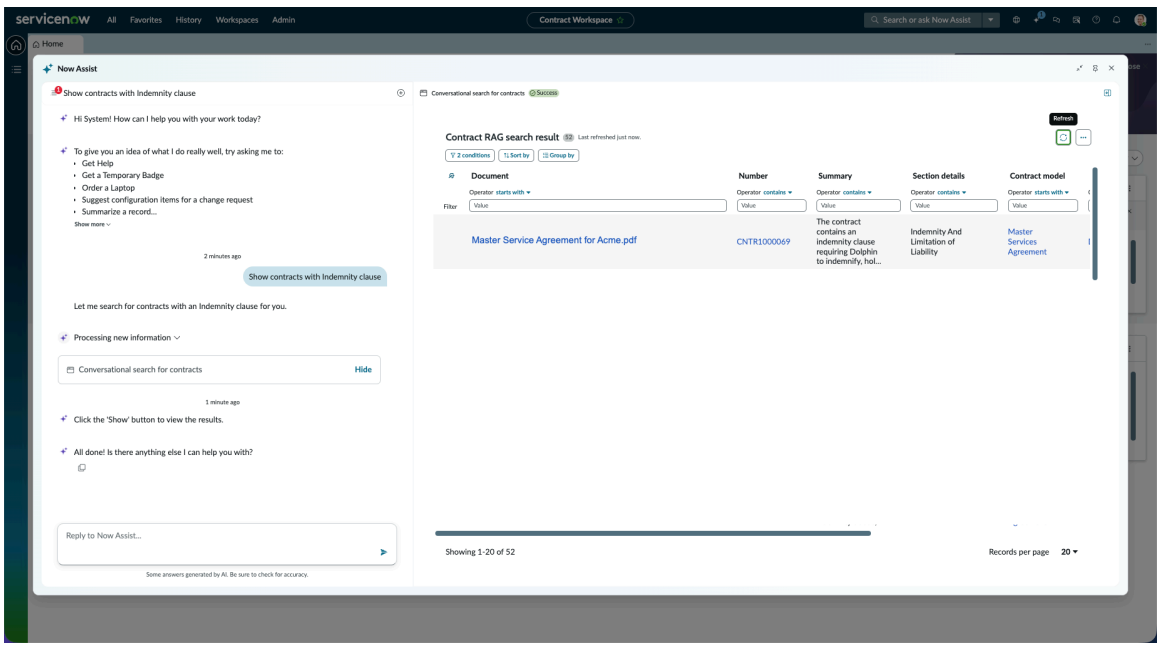
Role required: sn_cm_gen_ai.ai_contract_fulfiller

About this task

Conversational search enables you to find information by searching within the contract documents. The system performs semantic searches through the document text and returns relevant matches. By default the search results display the following columns:

- Document: Document name in which content is found
- Number: Contract number
- Summary: AI-generated summary explaining what was found
- Section details: Section of the document where the information was found

You can customize the columns to be displayed by using the **Personalize fields** option under **More Actions** icon.



Contract fulfillers and assignment group managers with the sn_cm_gen_ai.ai_contract_fulfiller and now_assist_panel_user role can view the agentic workflow conversation in the Now Assist panel.

Note: The agentic workflow isn't supported in the Virtual Agent panel.

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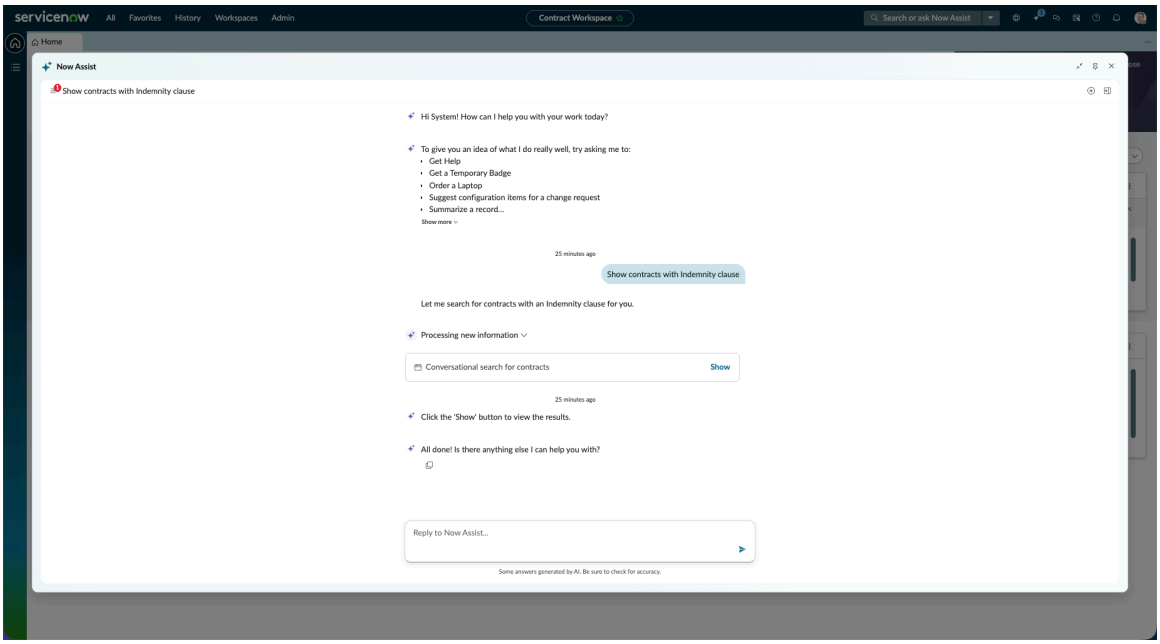
For feature limitations, see Explore Now Assist in Contract Management.

Procedure

1. Navigate to Now Assist panel.
2. Enter a query in the Now Assist panel.

Conversational search for contracts



3. Select **Show** to view the search results.
4. View contract details.
   a. Select CNTR number to view the contract details.
   b. Select **Open request** to open the contract record.
5. View contract document and search within it.
   The Document, Summary and Section details columns are available only when the search is performed within the contract document.

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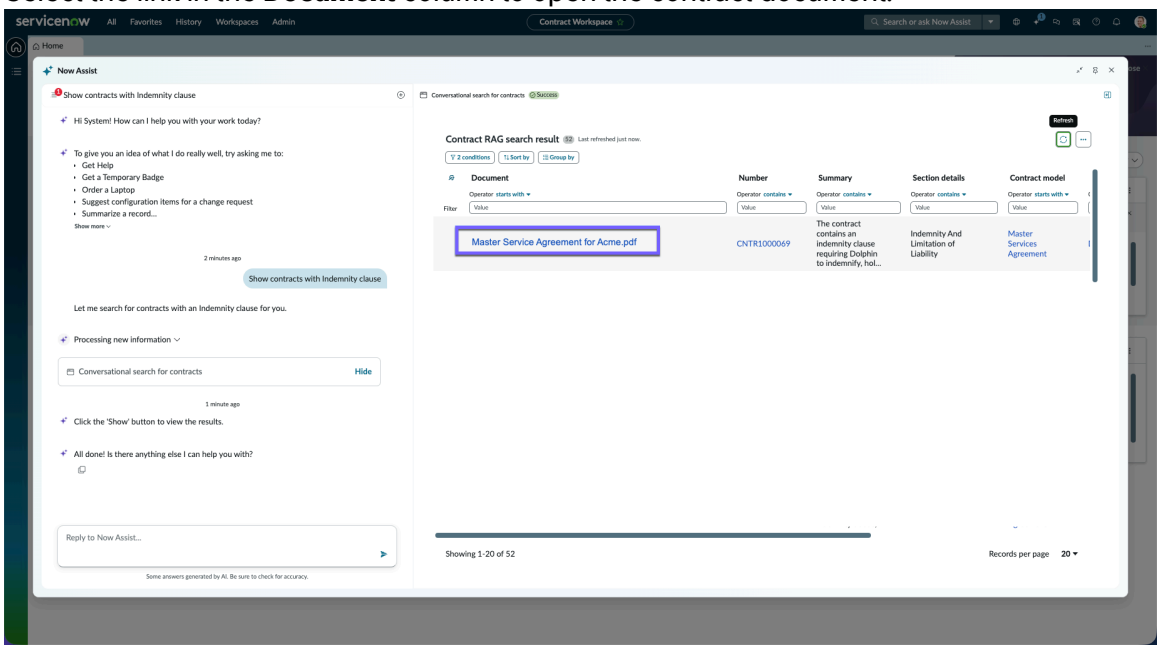
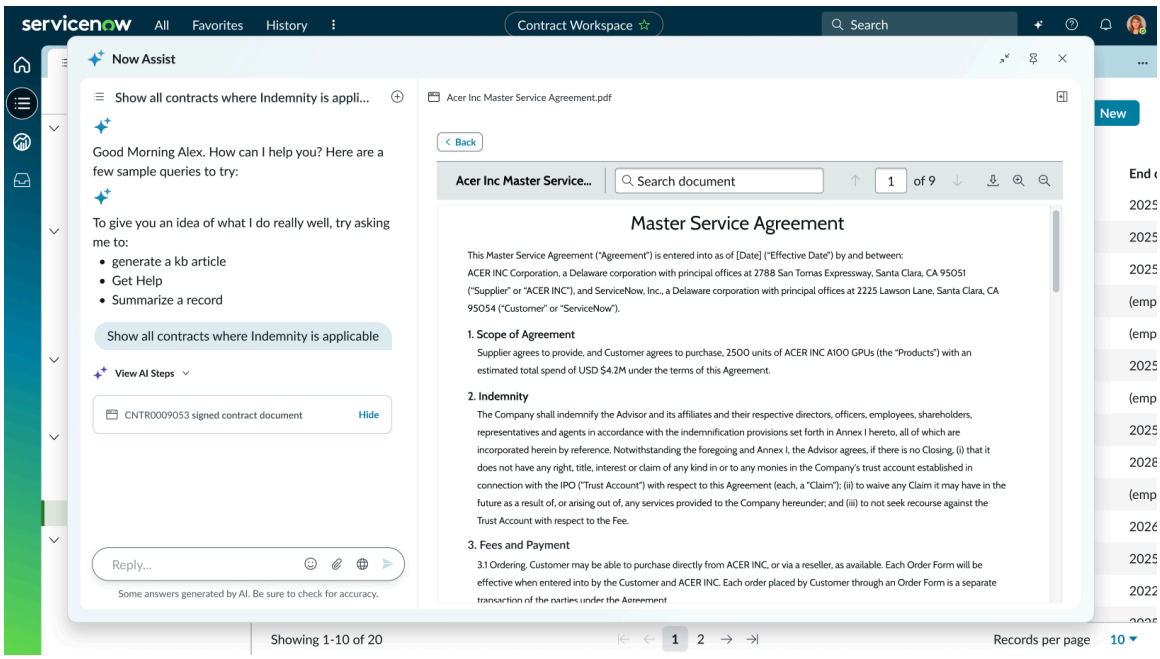
a. Select the link in the **Document** column to open the contract document.



b. View the document and enter text in the Search Document field to search within the document.



6. Navigate to the Summary and Section columns to view the AI generated summary for the search and to view the specific section where the search result was found.

Search in contract metadata

Ask question in the Now Assist panel to search for information related to contract fields.

Before you begin

Role required: sn_cm_gen_ai.ai_contract_fulfiller

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About this task

Conversational search enables you to find information by searching across contract fields using natural language queries. When you ask questions about structured contract information—such as vendor names, contract dates, payment terms, contract status, or business owners—the system searches the contract metadata and returns matching contract records. By default the search results display the following columns:

- Number
- Contract model
- Vendor
- Start date
- End date
- State

You can customize the columns to be displayed by using the **Personalize fields** option under **More Actions** icon.

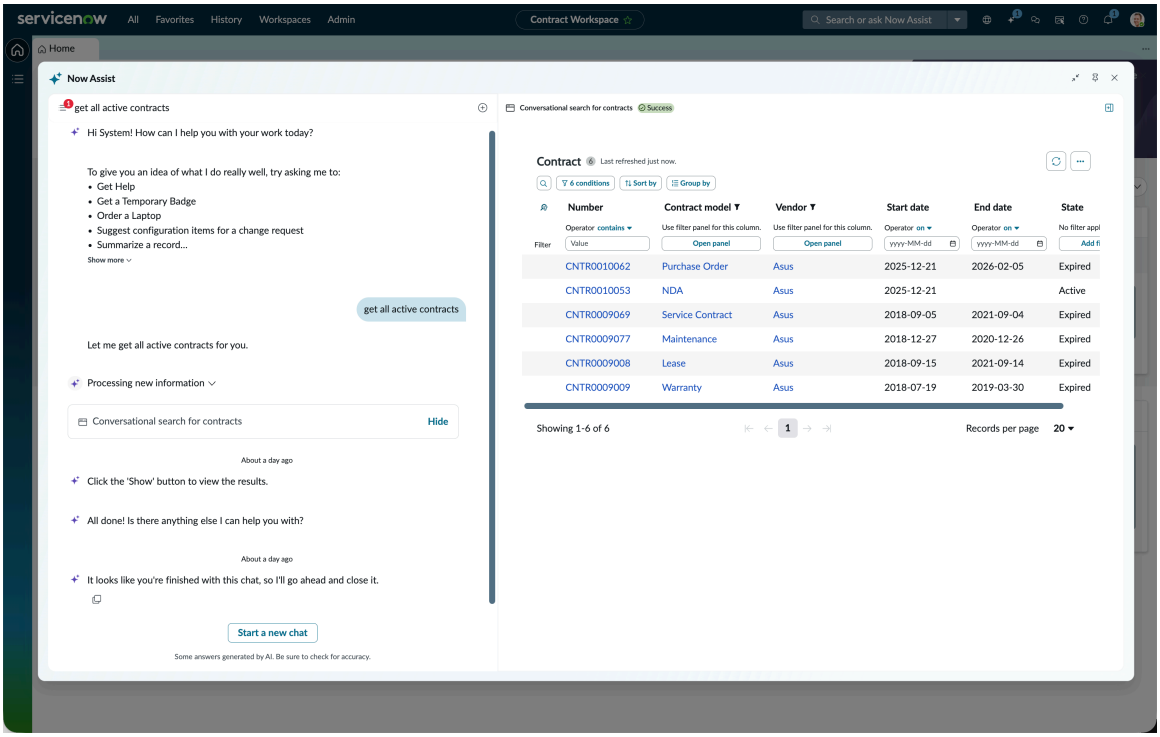
Contract fulfillers and assignment group managers with the sn_cm_gen_ai.ai_contract_fulfiller and now_assist_panel_user role can view the agentic workflow conversation in the Now Assist panel.

Note: The agentic workflow isn't supported in the Virtual Agent panel.

For feature limitations, see Explore Now Assist in Contract Management.

Procedure

1. Navigate to Now Assist panel.
2. Enter a query in the Now Assist panel.
3. Select **Show** to view the search results.
4. Select CNTR number to view the contract details.



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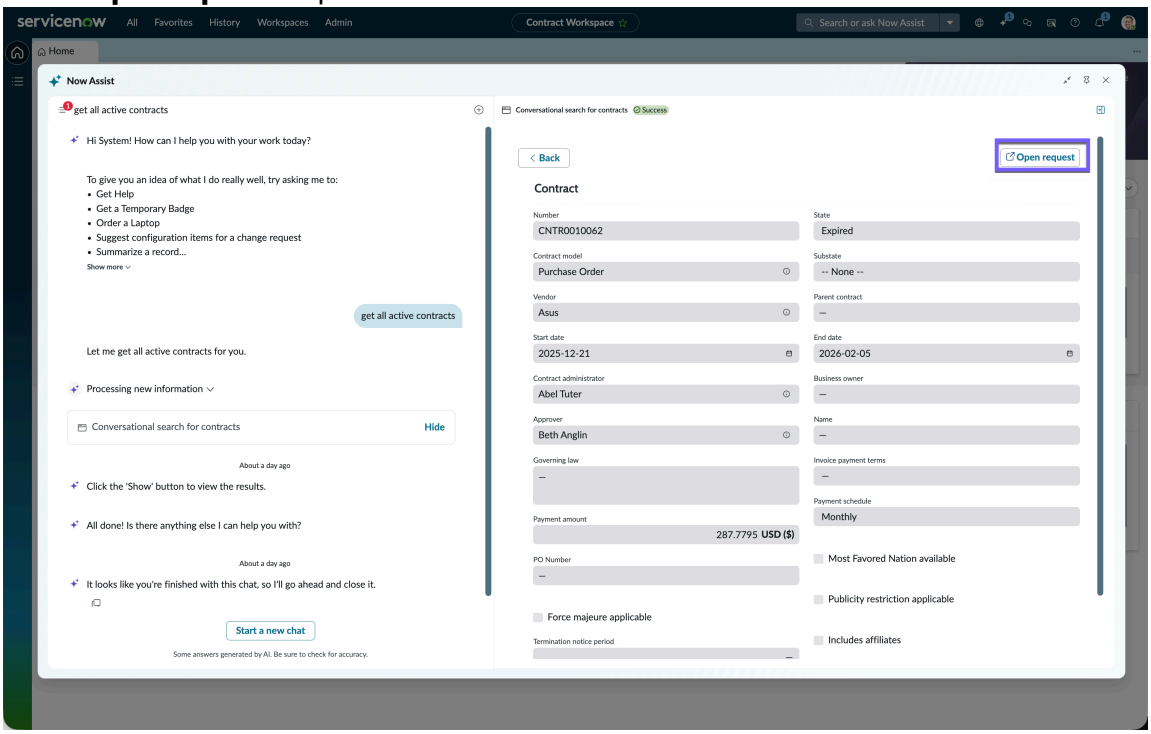
5. Select **Open request** to open the contract record.



Domain separation and Contract Management Pro

Domain separation is supported for Contract Management Pro. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

Overview of Contract Management Pro domain separation

Contract Management Pro supports domain separation at a basic level, enabling organizations to separate contract data between domains within a single ServiceNow instance. This capability is useful for global enterprises that require data separation across business units, or regions while continuing to use shared platform services and global configurations.

With basic domain separation support, all Contract Management Pro data tables are domain-separated, and data visibility follows the standard domain hierarchy rules.

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How domain separation works in Contract Management Pro

When a user who belongs to a specific domain creates a contract request in Contract Management Pro, the record is created in the domain of the user. Contract users and fulfillers can access only the records that exist within their domain or within child domains, based on the basic domain separation rules.

Domain separation in Contract Management Pro is enabled through the Domain Separation plugin. For more information, see Request domain separation.

All Contract Management Pro data tables support domain separation.

Because Contract Management Pro supports basic domain separation, workflows and business logic are not domain-separated. Workflows are shared across domains and are configured globally.

Contract templates, clauses, e-signature provider configurations, external storage integrations, and other advanced configurations are created in the TOP domain and can be reused across domains.

Use cases

- A managed service provider uses a single ServiceNow instance to manage contracts for multiple customers. Each customer's contract requests and contract data are created in separate domains, ensuring that users can access only the data relevant to their customer.
- A global enterprise uses domains to separate contract data by region or subsidiary. Contract managers work only with contracts created within their domain, while administrators in parent domains maintain visibility across multiple domains.

Related topics

Domain separation for service providers

Contract Management Pro reference

Reference topics provide additional information about Contract Management Pro.

Components installed with Contract Management Pro

Several types of components are installed with activation of the Contracts Core application that includes the components for Word Document Templates, including tables and user roles.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see Find components installed with an application.

Roles

Roles installed with Contract Management Pro

Role title [name]	Description	Contains roles	Group the role is assigned to by default
Contracts Core user	This role is required to initiate and track contract execution.	sn_cm_obligation.obligation_use	None

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Roles installed with Contract Management Pro (continued)

Role title [name]	Description	Contains roles	Group the role is assigned to by default
[sn_cm_core.contract_user]			
Contracts Core administrator [sn_cm_core.contract_admin]	Provides administrative access to Contracts Core and underlying data.	• sn_cm_core.contract_fulfiller • sn_cm_core.contract_config • usage_admin • sn_cm_pa.pa_admin role	None
Contracts Core configurator [sn_cm_core.contract_config]	Provides access to configure data for contract templates and contract configurations. It doesn't provide access to the transactional data of Contracts Core.	• user_criteria_admin • sn_cm_core.contract_fulfiller • view_changer • sn_doc.writer • contract_manager	Contract Operations
Contracts Core fulfiller [sn_cm_core.contract_fulfiller]	This role is required to initiate actions while fulfilling an assigned contract execution. Example: Create revisions, Add Signers, Cancel Signer.	• sn_cm_core.contract_user • sn_cm_core.contract_report_viewer • canvas_user • sn_cm_workspace.contract_workspace_user • approver_user • email_composer • sn_cm_core.contract_report_viewer • sn_cm_obligation.obligation_fulfiller	Contracts Support
Contract report viewer [sn_cm_core.contract_report_viewer]	Provides access to view reports for contract requests and signed contracts data on the Contracts Dashboard.	• report_user • sn_cm_core.contract_user • pa_viewer	None
Contract report publisher [sn_cm_core.contract_report_publisher]	Provides access to contract requests and signed contracts data for publishing the related reports.	• report_publisher • sn_cm_core.contract_report_viewer • sn_cm_core.contract_user • pa_power_user • pa_data_collector	None
Contract reviewer [sn_cm_core.contract_reviewer]	Provides access to review tasks.	None	None

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Roles installed with Contract Management Pro (continued)

Role title [name]	Description	Contains roles	Group the role is assigned to by default
Obligation user [sn_cm_obligation.obligation_user]	This role is required to update and submit obligation tasks.	None	None
Obligation fulfiller [sn_cm_obligation.obligation_fulfiller]	This role is required to perform actions while managing an obligation. Example: Create obligations,Approve, Reject, or Cancel obligation tasks.	sn_cm_obligation.obligation_user	Obligation Fulfillers
Obligation administrator [sn_cm_obligation.obligation_admin]	Provides administrative access to Obligation management and underlying data.	sn_cm_obligation.obligation_fulfiller	None

Tables

Tables installed with Contract Management Pro

Table	Description
Contracts Core	
Clause [sn_cm_core_clause]	Stores the details of clause fields.
Imported Clause [sn_cm_core_imported_clause]	Stores data related to imported clauses
Clause mapping [sn_cm_core_m2m_clause_word_template]	Stores the details of clause mappings.
Clause Variation [sn_cm_core_clause_variation]	Stores the details of clause variations.
Clause Variation Field [sn_cm_core_clause_variation_field]	Stores the details of clause variation fields.
Contract Type [sn_cm_core_contract_type]	Stores the details of contract types.
Contract Document [sn_cm_core_document]	Stores the details of contract documents.

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Tables installed with Contract Management Pro (continued)

Table	Description
Contract Document Revision [sn_cm_core_document_revision]	Stores the details of contract revision.
Contract Type Association [sn_cm_core_m2m_contract_type_template]	Stores the details of contract type associations.
Contract Configuration [sn_cm_core_contract_configuration]	Stores details of mapped data that will be added to the contract document and the contract repository where the contracts will be stored.
Contract execution [sn_cm_core_contract_execution]	Stores the details of contract execution.
Contract Repository Mapping [sn_cm_core_contract_repository_mapping]	Stores the data related to mapping between contract request fields and contract repository fields.
Internal Signatory Rule [sn_cm_core_Signer_Rule]	Stores internal signer rule.
Signatory [sn_cm_core_signer_task]	Stores details and the status of the task assigned to the signers.
Contract Type - Contract Model Mapping [sn_cm_core_contract_type_m2m_contract_model]	Store details of contract model mapping.
Contract Document References [sn_cm_core_document_reference]	Store details of document references.
Contract Template Rule [sn_cm_core_contract_template_rule]	Store details of contract template rules.
Supporting File [sn_cm_core_supporting_file]	Store details of supporting files attached to the non-self-served contract request.
[sn_cm_core_Integration_Core] Contract Integration	Store details for integration configured for contracts.
[sn_cm_core_Integration_Esignature] Electronic Signature	Store details of e-signature integrations configured.
Signers Mapping	Store details of signer mappings.

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Tables installed with Contract Management Pro (continued)

Table	Description
[sn_cm_core_Signer_M2m_Participant_Mapping]	
Contract Integration [sn_cm_core_Integration_External_Storage]	Store details of configured external storage integrations.
Contract Request [sn_cm_core_Contract_Request]	Store details of the contract requests
External Storage Permission [sn_cm_core_external_storage_permission]	Store details of users and their external storage permissions.
Obligation management	
Obligations [sn_cm_obligation_obligation]	Store details of obligation records.
Obligation tasks [sn_cm_obligation_obligation_task]	Store details of obligation tasks.

Scheduled jobs

There are several properties that you can use to configure integrations for Contract Management Pro. These properties are used while executing the following scheduled jobs. For more information, see Properties installed to configure contracts integrations.

Scheduled jobs installed with Contract Management Pro

Scheduled job	Data synced to the table	Active	Description
Process external storage permissions for Contracts	External Storage Permission [sn_cm_core_external_storage_permission]	True	Process external storage permissions for the users.
Validate schedule and create recurring obligation tasks	Obligations [sn_cm_obligation_obligation_task]	True	Validate schedule and create recurring obligation tasks

Components installed with Contract Workspace

User roles are installed with activation of the Contract Workspace plugin.

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Roles

Roles installed with Contract Workspace

Role title [name]	Description	Contains roles
Contract Workspace User [sn_cm_workspace.contract_workspace_user]	Provides users with access to the Contract Workspace.	Workspace user [workspace_user]
Contract Workspace Admin [sn_cm_workspace.admin]	Grants permissions to all administrators to change the Contract Workspace for Contract Management Pro to fit into the business or user requirements.	Workspace administrator [workspace_admin] • Chat admin [chat_admin] - The chat admin role administers the chat tables. • UX framework designer [uxframework_designer] - The UX framework designer role has write access to UX page element records for designing UIs. • Contract Workspace User [sn_cm_workspace.contract_workspace_user] - The contract workspace user role has access the contract workspace. • Fulfiller recommendation admin [sn_agent_recommend.recommendation_admin] - The fulfiller recommendation admin role manages fulfiller assisted recommendation configurations. • Interaction admin [interaction_admin] - The interaction_admin role enables you to administer the Interaction Management system. • Workspace list admin [workspace_list_admin] - The workspace_list_admin role enables you to manage Workspace lists and categories. • UI action admin [ui_action_admin] - The UI action admin role enables you to manage UI actions. • UI Builder admin [ui_builder_admin] - The UI builder admin role provides permission to use the UI Builder APIs so you can create, update, read, and delete UX pages. • UX framework user [uxframework_user] - The UX framework user role enables you to browse and select from the library of

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Roles installed with Contract Workspace (continued)

Role title [name]	Description	Contains roles
		UX component records so they can set a component reference field on any accessible table. • Similarity Analyzer [sn_intel_analyzer.similarity _analyzer_admin] - The Similarity Analyzer role enables you to administer the Similarity Analyzer. The Similarity Analyzer defines patterns and trends that can help you resolve a record. • Form admin [form_admin] - The form_admin role manages forms, form sections, and section elements. • Personalize form [personalize_form] - The personalize_form role enables you to personalize forms. • UI notification admin [ui_notification_admin] - The UI notification admin role enables you to configure notification triggers.

Components installed with Analytics Pack for Contract Management Pro

Several types of components are installed with activation of the Analytics Pack for Contract Management Pro plugin, including user roles and scheduled jobs.

Roles

Roles installed with Analytics Pack for Contract Management Pro

Role title [name]	Description	Contains roles
Contracts PA Admin [sn_cm_pa.pa_admin]	Provides the admin with permission to activate and configure the Analytics Pack for Contract Management Pro application.	Contract Report Publisher [sn_cm_core.contract_report_publisher]

Scheduled jobs

Scheduled jobs installed with Analytics Pack for Contract Management Pro

Scheduled job	Description
Contracts Core: Daily Data Collection	Collects analytics information for the indicators and breakdowns in the Contracts Dashboard.

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Scheduled jobs installed with Analytics Pack for Contract Management Pro (continued)

Scheduled job	Description
	This job runs daily and populates the contract request data in the widgets of the dashboard.
Contracts Core: Monthly Data Collection	Collects analytics information for the indicators and breakdowns in the Contracts Dashboard. This job runs monthly and populates the contract request data in the widgets of the dashboard.
Contracts Core: Historical Data Collection	Provides an immediate insight from your existing contract request data. Run this job when you first activate Analytics Pack for Contract Management Pro or create indicators. When collecting data for the first time, the job generates scores and snapshots for existing records. For more information on running historical data collection jobs, see Collect historical data.

Note: The jobs must be run in the following sequence:

1. Contracts Core: Daily Data Collection
2. Contracts Core: Monthly Data Collection
3. Contracts Core: Historical Data Collection

Contract request State and Contract document status in Contract Management Pro

Contract requests follow a specific life cycle and move through a series of states in Contract Management Pro. The contract request state and the contract document status are displayed in the State and the Contract status fields on the request record.

For a contract request you can see the following:

- State: Indicating the state of the contract request.
- Contract status: Indicating the status of the contract document.

Note: For cumulative approvals in the multiple-document scenario, the approval status of latest revision is considered for populating the contract status.

Contract request State

State	Description	Contract status for the state
Draft	The contract request is in draft state and not yet submitted.	• Draft • Error
New	The contract request is submitted and yet to be assigned.	• New • Changes requested

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Contract request State (continued)

State	Description	Contract status for the state
Work in progress	The contract request has been assigned to a contract fulfiller.	• Work in progress • Document approved • Document approval rejected • Document approval cancelled • Signing declined • E-signature invalid • Signature cancelled • Changes requested • Document ready • Review completed • Review cancelled • Error
Awaiting review	An internal review task has been raised for the review of the contract document.	• Awaiting review • Awaiting information
Awaiting approval	An approval request has been raised and the contract document is awaiting an approval. In multiple document approval scenario, when for at least 1 document (latest version) revision approval status is **Requested**, the contract status is **Awaiting approval**.	Awaiting approval
Awaiting signature	All signatories have signed the document.	• Awaiting signature • Preparing for signature • Signature paused • Signature delivery failed
Contract signed	The contract document has been signed by all the signatories.	• Contract signed • Contract generation failed
Closed complete	All actions including approvals and signatures are complete.	Contract signed

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Contract request State (continued)

State	Description	Contract status for the state
Cancelled	Request was canceled.	Cancelled

Contract status

Contract document Status	Description
State:Draft	
Draft	The contract request is in draft state and not yet submitted.
Error	The contract document could not be created due to missing configurations after submitting a request.
State:New	
New	The contract request is submitted and yet to be assigned.
Changes requested	The contract user has submitted a request giving details of the changes required in the contract document. **Note:** In the New state, the contract document status is set to Changes requested only when the contract request is unassigned.
State:Work in progress	
Work in progress	The contract request is in progress.
Changes requested	The contract user has submitted a request giving details of the changes required in the contract document.
Document ready	The change request submitted for modification in the contract document has been fulfilled.
Document approved	The contract document was approved by the approver.
Document approval rejected	The contract document was rejected by the approver. In multiple document approval scenario, when at least one approval is in the **rejected** state, the contract status is **Document approval rejected**.
Document approval cancelled	The approval task was canceled by the approver.
Signing declined	The signatory has declined signing the contract document.
E-signature invalid	There was an error in the electronic signature workflow.
Signature cancelled	The signature process was canceled.
Review completed	A contract reviewer is reviewing the document and has requested for information from the contract fulfiller.
Review cancelled	A contract reviewer is reviewing the document and has requested for information from the contract fulfiller.
Error	The contract document could not be created due to missing configurations while performing regenerate document action.

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Contract status (continued)

Contract document Status	Description
State:Awaiting review	
Awaiting review	An internal review task was raised and the contract document is under review.
Awaiting information	A contract reviewer is reviewing the document and has requested for information from the contract fulfiller.
State:Awaiting approval	
Awaiting approval	An approval request has been raised and the contract document is awaiting approval
State:Awaiting signature	
Awaiting signature	The contract document is awaiting signature.
Preparing for signature	The contract document is being prepared for signature.
Signature paused	Modify signatories action has been initiated and the signature workflow is paused.
Signature delivery failed	The signature request could not be delivered to one or more signatories. **Note:** This is applicable for electronic signature only.
State:Contract signed	
Contract signed	The contract document has been signed by all the signatories.
Contract generation failed	The contract has been signed, but the generation of the contract document for repository storage has failed.
State:Closed complete	
Contract signed	The contract document has been signed by all the signatories.
State:Cancelled	
Cancelled	Contract request was canceled.

Clause Variation form

Use the Clause Variation new record form to create or modify a clause variation.

Clause Variation

Field	Description
Number	This field contains an automatically generated unique clause variation number.
Name	Unique name for the clause variation.
Clause	This field is automatically set to the clause name.
Order	Order in which the clause variation is used.

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Clause Variation (continued)

Field	Description
	If multiple clauses meet a condition, the clause with the lower-order value is chosen first.
Application	This field is automatically set per the application scope setting.
Active	Option to indicate that the clause variation is active and available for use.
Applies when	Filter conditions applied to the selected table field and record producer variables to determine which clause variation to use.
Applies to	Criteria to determine the users to whom the clause variation is applicable. For example, if a clause variation is applicable to employees of a specific location, associate the clause variation with user criteria defining only employees of that region.
Applies to user	User to whom the selected user criteria is applicable. **Note:** If no value is selected in the **Applies when** and **Applies to** fields, the clause variation is applicable for the contract template regardless of the user and selected table.
Document	Select **Update** link to upload the document that has the modified content. The selected document should be of .docx file format and should have valid content controls. For more information, see Add content controls in a Microsoft Word document .
Language	This field is automatically set to the default language.
Advanced script	Enables the **Script** field where you can define clause conditions on fields and variables of a table that isn't directly linked to the contract template table. The condition determines when the clause variation is used in a contract. **Note:** The **Applies when** field is not available when you select the **Advanced script** check box.

Contract Configuration form

Use the Contract Configuration New Record form to create or modify a contract configurations.

Contract Configuration form for contract records

Field	Description
Name	Unique name for the contract configuration.
Request Table	Table with which you want to associate the contract configuration.

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Contract Configuration form for contract records (continued)

Field	Description
	Note: The Contract Request table [sn_cm_core_contract_request] is selected by default to centralize the configuration on a single table and improve reusability across product lines. You can choose to have the configuration on a different table.
Contract Repository	Repository where the contract records should be created.
Document type	Indicates how the contract document is generated. The available values are: • Word template: Contract document is generated from Word document templates for the contract configuration. • Third-party contract: Contract documents is generated from the documents attached in the third-party contract request.
Template	The contract template to be used to generate a standard contract with predefined content. This field appears only when Word template is selected from **Document type**.
Application	This field is automatically set per the application scope setting.
Request type	Type of request the template rule is applicable to. For contract requests, select **New Contract**; for amendment requests, select **Amendment**.
Active	Option to make the contract configuration active.
Order	Order in which the selection rule is run. If multiple rules meet the conditions from a contract request, the rule with the lowest order number is run first for selecting the configuration.
Applies to	Conditions under which the contract configuration is applied. For example, to apply a configuration when a contract request is submitted in the Non-disclosure agreement category, you would enter the following condition: **[Category][is][Non-disclosure agreement]**.

Properties installed to configure expiry notifications

There are several properties related to Contracts Core that can be used to configure the number of days before which expiry notification should be sent and the generation of audit certificate.

Note: These properties are located in the System Properties [sys_properties] table. To access the table, enter `sys_properties.list` in the navigation filter.

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Properties for Contracts Core

Property	Description
sn_cm_core.contract_expiring_days	Indicates the number of days before which an expiry email notification is sent to the stakeholders. • Type: Integer • Default value: 30
sn_cm_core.enable_executed_contract_audit_certificate	Specifies whether the user needs an audit certificate to accompany the signed contract. • Type: true|false • Default value: false

Properties installed to configure contracts integrations

There are several properties that you can use to configure integrations for Contract Management Pro.

These properties are available for Contract Management Pro.

Note: To configure these properties, navigate to Navigate to **All** > **Contracts Core** > **Contract Integrations** > **Properties**.

Properties

Property	Description
External Storage section	
Maximum number of attempts before removing the permission records with errors sn_cm_core.external_storage_clear_errored_records_after	The number of retries permitted before removing all errored permission entries from the job execution queue. • Type: integer • Default value: 5
Maximum number of permission records to include in a job execution sn_cm_core.external_storage_job_batch_limit	The number of permission records that can be included in single job execution. • Type: integer • Default value: 30
Time in minutes to retry permission records execution sn_cm_core.external_storage_apis_retry_after	The amount of time the system waits in minutes before retrying to execute permission records.

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Properties (continued)

Property	Description
	• Type: integer • Default value: 60
Maximum number of failed calls before marking the flow status as errored sn_cm_core.external_storage_mark_flow_status_errored	The maximum number of failed job execution calls permitted before the flow status is marked as errored. • Type: integer • Default value: 5
Electronic Signature section	
Specifies whether the user needs audit certificate combined with the signed contract sn_cm_core.enable_executed_contract_audit_certificate	Generate a certificate of completion for electronically signed contracts.

Expiring Contracts Condition form fields

The Expiring Contracts Condition form is used to create a rule or update an existing rule.

Expiring contracts condition form fields

Field	Description
Name	Name of the condition.
Table	Table on which the contract reminder expiry conditions for the selected field is validated.
Condition check	Table on which the contract reminder expiry conditions for the selected field is validated. A contract reminder email is triggered when the conditions are met.
Application	The application where the condition is created and used.
Compliant state	System field. Do not use.
Order	Order in which the conditions are evaluated.
Event name	Name of the event this condition triggers.
Expiration Condition	Condition that must be true for the **Condition check** field to be set to this value. Add as many conditions as are needed. For more information on condition check, see Define a condition check.
Domain	Domain of the condition.

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Action assignment form

Learn about the fields of the Action Assignment form. Use this form to add the New action button to your workspace.

Use the action assignment form to define a action button in your workspace and map it to the built-in action that initiates a contract request. For more information, see Add a workspace action button for initiating a contract request.

Action Assignment New record

Field	Description
Action label	Label that appears on the button created through the action. For example: Initiate Contract
Action name	Name for your action that appears in the action assignment list. For example, `initiate_contract`.
Application	Application of the workspace for which the action is added. Example: To add action to Source-to-Pay workspace, select Source-to-Pay Workspace.
Table	Application table to which the action will be associated to. Example: To associate action to the Sourtable that stores requests to source for supplier products, select Sourcing Request [sn_shop_sourcing_activity]
View	View of the form on which the action button is displayed.
Enable for all Configurable Experience	Determines whether the action should appear in all experiences or only in specified experiences. If true, the action appears in any applicable form regardless of experience.
Active	Option to activate the action.
Order	Integer that determines the precedence of this action in relation to matching actions with the same name. The lower the number, the more likely it is to be selected against other actions. This ordering enables you to override other actions with your own.
Tooltip	Text that displays when agents point their cursor over the button.
Description	Description for the action that's displayed in the Action Assignments list.

UFX Add on Event mapping form

The UFX Add on Event mapping form to configure the display of declarative action in your application.

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UFX Add on Event Mapping Form

Field	Description
Event mapping name	Name for your map. For example, Initiate contract
Active	Option to activate the mapping.
Description	Description for the action that's displayed in the Action Assignments list.
Source component	The component where the button will appear. For example, the Action bar.
Controller	A controller that handles the target event. For example, Form.

Obligation form

The obligation form provides the details to create or modify an obligation record in Obligation Management.

Obligation record form

Field	Description
Number	An auto-generated unique number for the obligation record.
Contract	Unique number of the contract repository record.
Name	Name of the obligation.
Category	Category of the obligation. The available values are: • Operational or service delivery • Legal • Commercial • Compliance • Governance
Subcategory	Subcategory of the obligation. The available values depend on the selected category.
Active	Option to activate the obligation. If a recurring schedule has been defined for obligation tasks, activating the obligation creates obligation tasks based on the defined schedule.

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Obligation record form (continued)

Field	Description
Approver group	Group whose members have appropriate permissions to approve or reject an obligation task.
Approver	Member of the approver group assigned to approve the obligation tasks.
Task assigned to	User to whom the obligation tasks will be assigned by default. This value can be overridden by assigning a user once the obligation task is created. A notification email is sent to the assigned user.
Start date	Date from which the obligation will be in effect.
End date	Date on which the obligation ends.
Instructions	Actions that must be performed as part of the obligation.
Description	Extract from the contract that describes the obligation.
Schedule type	Schedule type of the obligation tasks. **Adhoc** Obligation must be fulfilled once or at irregular intervals. You must create obligation tasks manually. **Recurring** Obligation must be fulfilled regularly at a defined interval. Obligation tasks are automatically created based on the interval specified in the **Repeats** field and according to the value in the **Task creation lead time (days)** field.
Repeats	This field appears only when **Recurring** is selected from the **Schedule** field.

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Obligation record form (continued)

Field	Description
	Note: For monthly or yearly repeats, the first obligation task is due on the selected date and recurring obligation tasks are due on the same day of the month or year as the initial value. For example, if you select 2024-08-10 as the **Due date** value, the first obligation task will be due on the 10th of August 2024 and the subsequent tasks will be due on the 10th day of the month in the specified interval or on that date every year. If you select the 31st day of a month as the **Due date** value, the obligation tasks for months with less than 31 days will be due on the last day of that month. The available values are: • **Daily** - Obligation tasks are created daily and are due every day between the start date and end date of the obligation record. • **Weekly** - Obligation tasks are created every week. The value in the **Repeats** field that appears when this value is selected determines the days of the week when the obligation tasks should be fulfilled. • **Monthly** - Obligation tasks are created once a month and are due on the day of the month specified in the **Due date** field that appears when this value is selected. • **Every three months** - Obligation tasks are created every three months and are due on the day of the month specified in the **Due date** field that appears when this value is selected. • **Every six months** - Obligation tasks are created once a month and are due on the day of the month specified in the **Due date** field that appears when this value is selected. • **Yearly** - Obligation tasks are created once a year, with the first obligation task being due on the selected date and recurring obligation tasks due on the same date every year.
Task creation lead time (days)	This field appears only when **Recurring** is selected from the **Schedule** field. It determines the number of days before the task's due date when the obligation tasks should be automatically created.

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Obligation Management notifications

Obligation Management uses email notifications to notify obligation fulfiller and obligation users when an obligation task is created, assigned, submitted, approved, or rejected.

Obligation task notification details

Name	Recipient	Title
Obligation task created/ assigned	Assigned to	${number} is assigned to you
Obligation task submitted	Approver	${number} has been submitted for your approval
Obligation task approved	Assigned to	${number} has been approved
Obligation task rejected	Assigned to	${number} has been rejected

The following notifications are not activated by default:

- Obligation task submitted
- Obligation task approved
- Obligation task rejected

For information about how to activate notifications, see Configure Obligation Management notifications.

Contract Management Pro glossary

Learn about the terms and concepts used in Contract Management Pro.

Glossary terms are grouped alphabetically.

A | C | E | M | N | O | R | S | T | W

A

Approval workflow

A predefined sequence of automated or manual steps that a contract must go through to receive necessary approvals before execution.

audit trail

A record of all changes made to a contract.

C

clause management

The process of creating, storing, and managing standard contract clauses and their variations to ensure consistency and compliance.

clause mapping

Mapping clauses to field groups and expected responses, which helps in automating the contract review process.

clause library

A centralized repository within ServiceNow where standard contract clauses and their approved variations are stored for easy access and consistent usage.

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contract analysis

A Now Assist skill used to analyze contract documents for clause deviations, ensuring compliance with standard clauses and identifying potential risks

content controls

Dynamic placeholders within Microsoft Word documents that integrate with ServiceNow for inserting and updating contract content.

contract dashboard

A visual interface that provides an overview of contract statuses, key metrics, and performance indicators.

Contract Lifecycle Management (CLM)

The end-to-end process of managing contracts from initiation through execution, performance monitoring, and renewal or termination.

contract repository

A secure, centralized storage within ServiceNow where all contract documents and related information are stored, providing easy retrieval and management.

contract workspace

A centralized interface within ServiceNow where contract-related activities are tracked and managed.

contract templates

Predefined templates that are used to expedite the contract creation process and maintain consistency across agreements. These templates include placeholders for clauses, fields, dynamic tables, and signature blocks, which are automatically updated based on the information in a contract request.

E

e-signature

A legally binding electronic method for signing contracts, with integrations available for providers such as DocuSign and Adobe Sign.

employee center

A portal for submitting contract requests.

external storage

Third-party cloud storage platforms such as OneDrive or Google Drive that can be integrated with ServiceNow for contract document management.

M

metadata extraction

A Now Assist skill used to extract metadata from signed contracts and add the information to the system, streamlining the data entry process

Microsoft Word Add-in

A program that integrates with Microsoft Word that enables a user to add content controls for metadata, clauses, signature blocks, and dynamic tables.

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N

non-self-served request

A contract request that requires legal team involvement for drafting, negotiation, or finalization of the contract.

Now Assist in Contract Management Pro

A generative AI-powered feature that enhances productivity by suggesting contract clauses, and extracting metadata from a signed contract.

O

obligation

Specific commitments or duties outlined in a contract that parties are required to fulfill.

obligation management

The process of tracking and managing obligations within ServiceNow to ensure compliance and timely execution.

Optical Character Recognition (OCR)

A technology that converts scanned contract documents or PDFs into searchable and editable text within ServiceNow.

own-paper request

A contract request initiated and managed by the requester where the contract document is created using templates and clauses that have already been verified and approved by the internal contract team, reducing dependency on legal teams and accelerating processing.

R

record producer

A catalog item that allows end users to create records from the Service Catalog.

S

self-served contract request

A contract request that is initiated and managed by the requester. The contract document is created by using templates and clauses that have already been verified and approved by the internal contract team. The self-served contract request reduces the dependency on legal teams and accelerates processing.

ServiceNow Store

A marketplace where users can find and install applications, plugins, and enhancements for ServiceNow, including contract management extensions.

T

third-party contract request

A contract request that requires the legal team to draft, negotiate, or finalize the contract.

W

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wet signature

A traditional handwritten signature on a physical contract document, sometimes required for compliance or regulatory purposes.

Contract Management solutions

Explore the differences between the different contract management solutions offered in ServiceNow - ITAM Contract Management, (Deprecated) Legal Simple Contracts, and Contract Management Pro (CM Pro)

This resource helps you review the strengths of each application and guide you in selecting the most suitable option for your organization's contract management needs.

- Contract Management Pro: Management of contract creation, execution, storage, and reporting
- (Deprecated) LSD Legal Simple Contracts: Creation of standard language contracts
- ITAM Contract Management: Software and hardware asset management

Contract Management applications feature comparison

	Features	ITAM Contract Management
Contract Request	Self-serve with configurable Intake	-
	Third party contracts	-
	Third party contracts with multiple documents	-
	NOW Integrations (Legal, Procurement, Sales)	-
Contract Authoring	PDF, HTML Templates	-
	MS Word Templates	-
	MS Word Add-in	-
	Clause Library for Contract Generation	-
	Versions	-
	Versions with multiple documents	-
	External storage (OneDrive and GoogleDrive)	-
	Create contract record	-
	AI-assisted Review	-
	Contract Workspace	-
	Clause Library for Negotiation	-

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Contract Management applications feature comparison (continued)

	Features	ITAM Contract Management
	Amendment workflow	-
Signatures	Wet Signature	-
	Electronic signature (AdobeSign, DocuSign integration)	
Review and Approvals	Ad-hoc approvals	
	Internal reviews	
Repository	Document storage in ServiceNow	✓
	OneDrive, Google Drive storage integration	-
	Contract Relationships (parent/child)	✓
	Contract Metadata	✓
	AI Metadata Extraction	-
Obligation Management	Expiry / Renewal notifications	✓
	AI Obligation Extraction	-
Analytics	Dashboard for Volume & Work distribution	-
	Dashboard for asset contract renewals	✓

Migrating from Legal Simple Contracts to Contract Management Pro

Legal Simple Contracts is being deprecated.

- For new customers, it is now hidden and no longer available.
- For existing customers, it will continue to function and remain supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

You can migrate your data from Legal Simple Contracts to Contract Management Pro to start using the additional features available.

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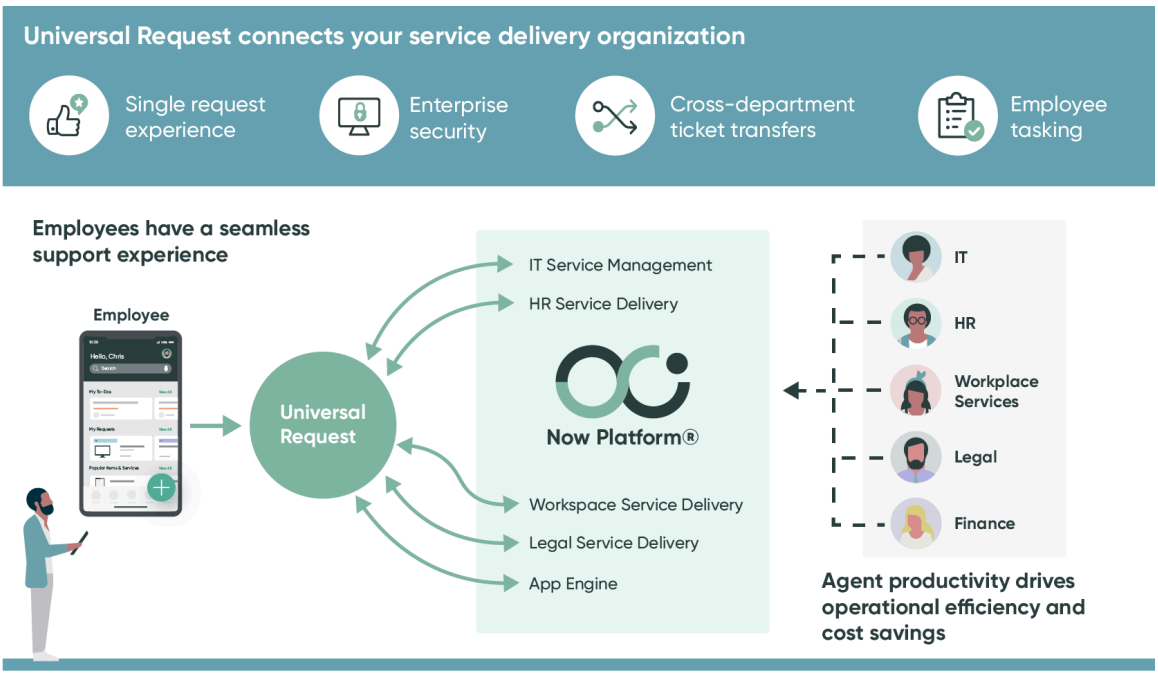
For more information on migration, see Migrating to Contract Management Pro for Legal Service Delivery.

Important: The migration script is designed only for migrating data from Legal Simple Contracts to the Legal Contract Repository, which applies specifically to Contract Management Pro for Legal Service Delivery.

Contract Management Pro for Legal Service Delivery is a licensed application that must be installed separately.

Universal Request

ServiceNow Universal Request empowers customers in their journey toward Enterprise Service Management (ESM) or Global Business Services (GBS) by enabling agents to resolve cases seamlessly across the enterprise to provide a better employee experience.



Employee experience

Enhance the experience by eliminating the employee confusion when figuring out which department to reach out to for help. Hide the complexities of the service delivery process by handling request transfers across the enterprise behind the scenes.

Enterprise security

Restrict access to the request at the time of creation or after assessing the request for an agent to view the ticket that has sensitive information. This enhanced security ensures that security is maintained while transferring the request between scoped applications.

Cross-department ticket transfers

Transfer tickets between scoped applications by configuring the transfer type without compromising on the security protocols. Also, route tickets using artificial intelligence.

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Tasking capabilities

Task employees to get additional information needed to fulfill the employee's request. Integrate the Universal Task framework to create a general and standard task experience for both the agent/fulfiller and the employee.

Explore  Learn about how employees, agents, and managers use Universal Request.	Configure  Plan and configure your implementation.	Integrate  Extend Universal Request capabilities by integrating with other applications.
Use  Work on universal requests, and manage security and transfers.	Analytics and Reporting Solutions  Coordinate work and improve processes with dashboards and reports.	Reference  Get details about components like fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Universal Request

The ServiceNow Universal Request application enables cross-departmental reporting from the time of an initial employee request through the final issue resolution. You can map various departmental ticket states and activity streams into a unified and simplified experience for your employees and agents.

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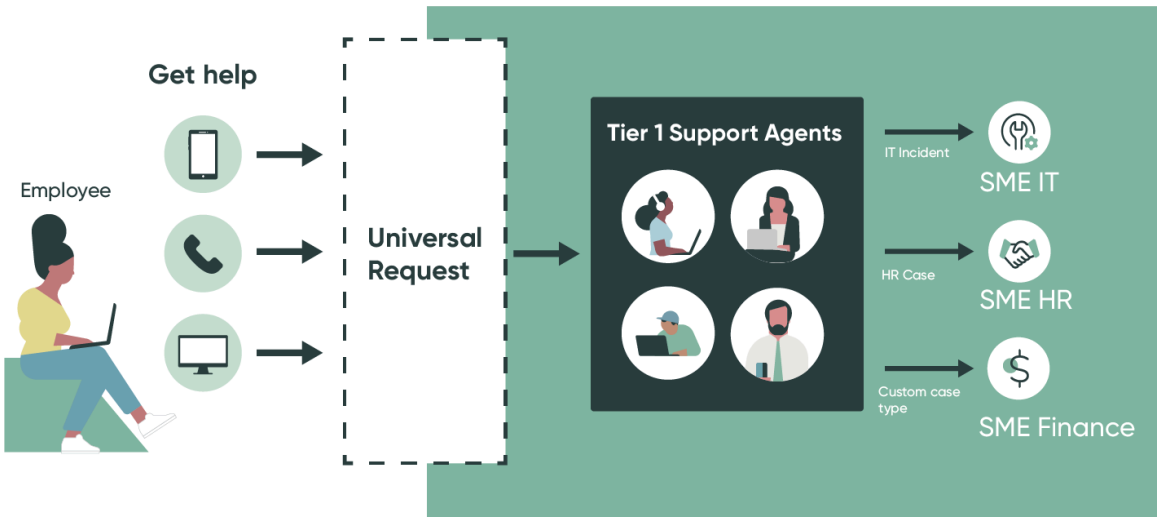
Universal Request application supports the following two most common ESM or GBS service delivery models.

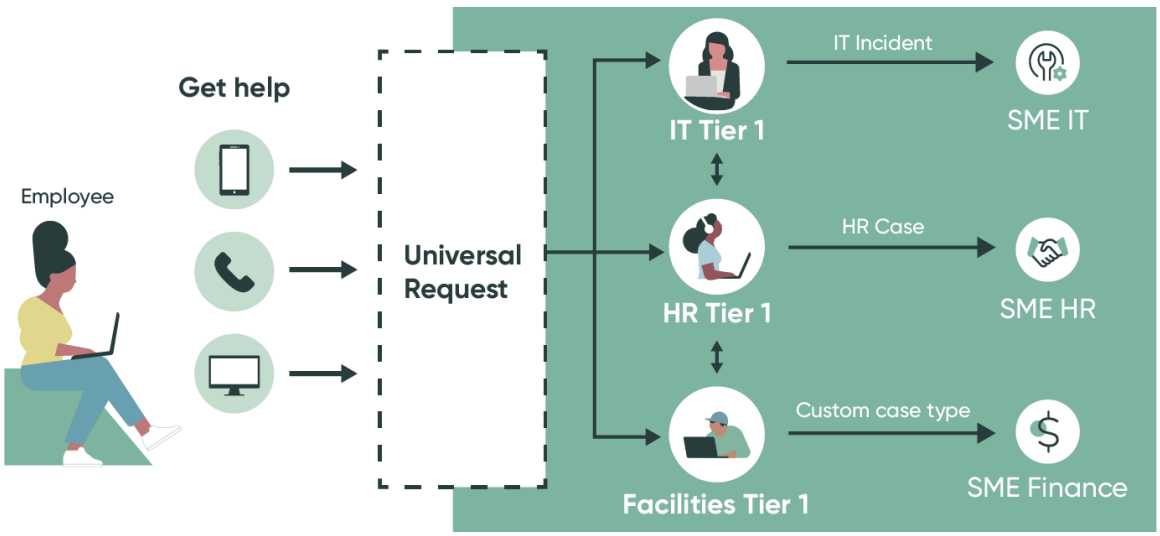
Cross-departmental Tier 1 support desk

If your organization has a cross-trained group of Tier 1 agents to resolve routine requests, then you can use this support desk model. In this model, universal requests are assigned to the cross-departmental tier 1 support desk agents to triage, resolve, or forward unresolved requests to a higher support level within a specific department.



Embedded Tier 1 Support Desks

If your organization has tier 1 agents in each department, such as IT, HR, and Finance, then you can use this support desk model. In this model, universal requests are routed to the appropriate departmental tier 1 agents who resolve, escalate, or transfer the requests to the correct department.



The Universal Request application provides the following key benefits to employees and agents of your organization:

- Facilitates employees to create a request by just clicking **Request Help** in the Service Portal if they cannot find the relevant search results or are unsure of which department to contact for help.
- Provides a consistent and unified ticket page experience to employees across service departments.

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- Enables agents to effectively resolve a case or request through cross-departmental interactions rather than working in silos.
- Provide an end-to-end user experience with complete visibility to the case details.
- Enables ticket transfers across departments or between a Tier-1 support desk and higher-level departmental support teams, with enhanced security.
- Enables agents to task employees using the Universal Task application to complete a catalog item or upload a document to facilitate quick resolution of a request.
- Monitor and improve the end-to-end experience with cross-departmental SLAs and metrics.

Universal Request versus Interaction Records (New Call record)

Universal request and interaction records are created and used by agents of various departments. However, they differ in the way they are handled. The following information provides an overview of both the records and how they differ from each other.

Interaction Record

An Interaction Record or a New Call record is used by an agent to take notes and determine the next steps during a live chat or a phone call. From an Interaction Record, an agent can perform one of the following actions:

- Attach the interaction to an existing request, such as an IT incident, an HR case, or a Universal Request.
- Create a new department ticket, such as an IT incident or an HR case.
- Create a Universal Request and assign it to a Tier 1 agent or assignment group in a specific department.

Let's say an agent gets a live chat from a customer who is experiencing a technical problem. The agent documents the conversation in an interaction record and determines that the issue needs expertise of IT department. To ensure a seamless hand off, the agent creates an IT incident.

Universal Request

A Universal Request is created from an Interaction Record or New Call record when an agent determines that a new task record must be transferred to a different department by assigning it to a Tier 1 assignment group.

Let's say an employee wants to find specific information about medical benefits on the company's self-service portal. The employee searches for information about medical benefits and finds no relevant catalog items. In this case, the employee can select **Request help** on the portal to create a universal request.

The following table lists the high-level differences between an Interaction Record and a Universal Request.

Differences between Universal Request and Interaction Record

Universal Request	Interaction Record
Universal Requests are task records used by Tier 1 agents to either resolve or escalate an employee issue through any channel.	Interaction records are temporary records used by agents to capture initial interactions with an employee from a chat or phone call. The agent determines whether to create a new task record or add it to an existing record.

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Differences between Universal Request and Interaction Record (continued)

Universal Request	Interaction Record
Universal Requests are requester-facing records. The universal requests are listed on the requester's ticket list page. They can view the individual tickets in the standard ticket page.	Interaction records are not requester-facing records.
Universal Request is a task type that agents work on. Universal Request supports cross-departmental ticket transfers and a unified ticket page experience for the requester.	Interaction record is not a task type.
Universal Request is a task type that serves as a parent record for other records that are created as child records, such as INC, HRC, and custom task types. It is also used for all cross-departmental reporting.	Interaction records cannot be used for cross-departmental SLA reporting.

Universal Request data model

Universal Request is a task type that supports cross-departmental collaboration and unified employee experience. Universal Request becomes the parent record for departmental primary tickets, such as IT incidents and HR cases, and enables your organization to measure cross-departmental SLAs and OLAs.

The Universal Request (UR) is a task that can be created from any of the following sources.

- Requester-created: An employee uses any of following options to submit a request.
  - Clicks **Request Help** on the Service Portal or Employee Center.
  - Taps **Needs Help** on a mobile device.
  - Uses the virtual agent chat on the portals.
- Agent created: An IT service desk agent receives a phone call or live chat from an employee, starts a new call record or an Interaction Record, and in some cases, can create a Universal Request instead of a department ticket. The agent can then assign that UR to an appropriate Tier 1 assignment group.
- System generated: Based on configuration, a universal request is created when an employee submits a Record Producer. The Record Producer is configured to automatically create a Universal Request to enable cross-departmental request transfer and a consistent ticket view for the requester.

The following diagram shows a high-level overview of the Universal Request data model.

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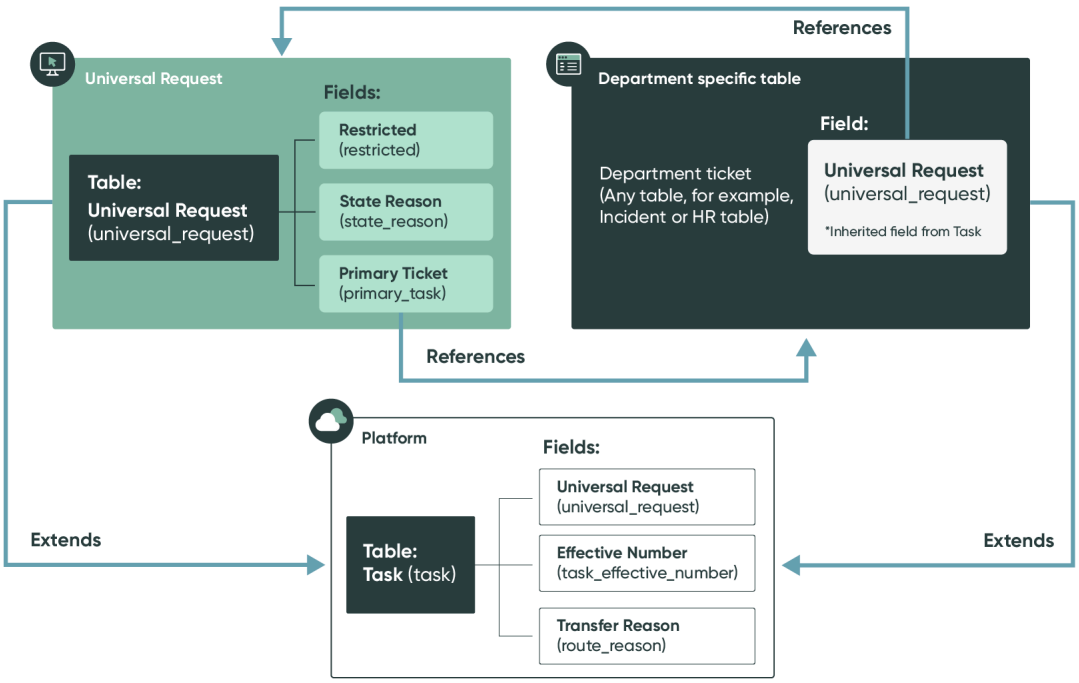

The Universal Request data model uses a combination of tables to store data:

- ServiceNow AI Platform tables
- Tables included with Universal Request

For information, see the list of Universal Request plugins.

The Task [task] table is modified to include the following fields:

- A Universal Request (UR) field points to the parent UR record. This model allows any table extending the Task table to be a child of the UR.
- Effective Number field (identifying number) stores the UR number, if the request has a UR associated with it. If it is not associated with a UR, then the Effective Number stores the current department-specific request number.
- Transfer Reason field stores the reason for the transfer of the request. The possible options are:

  With resolution

  Indicates that the request is completed and is transferred back to Universal Request, the specific department or service.

  Without resolution

  Indicates that the request is not completed and is transferred back to Universal Request, the specific department or service.

The Universal Request table includes:

- State reasons for the customer-facing states
- Primary ticket details of the department-specific requests
- Restricted field to indicate if the request created is sensitive or not

Universal Request also includes user roles and ACLs that customers can use to provide access to different tables. This includes both internal and external user roles.

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The Universal Request is a new task type that is extended from the base Task [task] table and is uniquely identified by a number prefixed with **UR**.

Universal Request table

Field	Description
Primary ticket	References the request that is currently active under the Universal Request. For example, INC1022201.
Opened for	The requester for whom the Universal Request is created.
State	Current state of the Universal Request. A UR can be in any of the following states: • New • In Progress • Awaiting Response from user • Closed For more information on the UR states, see Universal Request states and reasons.
State reason	The agent-facing reason for some requester-facing states. The state reason values are as follows: **Triaging:** A possible state reason when a Universal Request state is **In Progress**, and indicates that the Universal Request is being triaged. **Primary ticket WIP:** A possible state reason when a Universal Request state is **In Progress**, and indicates that the work for an active primary ticket is in progress. **Confirm response:** A possible state reason when a Universal Request state is **In Progress**, but the state reason changes to **Confirm Response** notifying the tier 1 agents to either accept or reject the response before closing the ticket for the requester. This happens when the **Needs Review** flag of the Universal Request is set to true. **Accept Resolution:**

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Universal Request table (continued)

Field	Description
	A possible state reason when a Universal Request is in **Awaiting Response** state indicating that there is a pending requester's action to accept the resolution provided. **Action required:** A possible state reason when a Universal Request is in **Awaiting Response** state that there is an additional action to be performed by the requester.
Restricted	Option for restricting access to a ticket that has sensitive data. If a ticket is marked as Restricted, then only the agents with the sensitive request access can view and resolve the ticket.

Primary Ticket field of the Universal Request table

The Primary Ticket field in the Universal Request determines the UR state and the requester's ticket view experience. Use the Standard Ticket page configuration of the primary ticket to determine the content that must be displayed in various sections of a standard ticket page. The primary ticket for an UR is a departmental ticket such as an IT incident or an HR case.

Note: A Universal Request can have only one primary ticket at a time.

For a Universal Request that is created for the first time, no primary tickets exist. If a child department ticket, such as an IT incident or an HR case is created from the UR, then the child ticket becomes the primary ticket. If the primary ticket is transferred back to UR or to another department, then the primary ticket field becomes empty. This sequence continues as new primary tickets are added and transferred back to UR or to another department.

When a record producer is configured to automatically create a Universal Request, then the UR becomes the parent record. And, when a department ticket is created, then that record becomes the primary ticket and remains until it is transferred back to the UR, to another department, or service.

Universal Request roles and groups

Users with certain roles and access can use Universal Request.

Universal Request roles

Role	Description
sn_uni_req.universal_request_read	Users with this role have read access to the Universal Request application and the related functions.
sn_uni_req.ur_admin	UR administrators can setup and configure Universal Request.

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Universal Request roles (continued)

Role	Description
sn_uni_req.routing_agent	Users with this role can open, update, and close Universal requests. By default, the users with the sn_uni_req.routing_agent role alone can have Universal requests assigned to them.
sn_uni_req.universal_request_write	Users with this role have both read and write access to the Universal Request application and the related functions.
sn_uni_req.ur_service_owner	Users with this role act as the Universal Request service owner that defines the process to service the universal request.
sn_uni_req.sensitiveinfo_agent	Users with this role can view and work on the tickets that are marked as restricted. Restricted tickets contain sensitive information and are secured from general viewing.

Universal Request application provides the following default assignment groups as part of the demo data. You can customize the default groups or create your organization-specific assignment groups.

Default assignment groups

Group	Description
IT Routing group	Assignment group that consists of tier-1 agents who manage both Universal Requests and IT incidents. The agents of this assignment group have both Universal Request role and the ITIL role. Agents assigned to the IT Routing group can: • Manage Universal Request. • Create child IT incidents from the UR parent.
HR Routing group	Assignment group that consists of tier-1 agents who manage both Universal Requests and HR cases. The agents of this assignment group have both Universal Request role and the HR role. Agents assigned to the HR Routing group can: • Manage Universal Request • Create child HR cases from the UR parent.
Universal Request Routing group	Assignment group that consists of tier 1 agents who focus primarily on managing Universal Requests. The agents of this assignment group have Universal Request role. Agents assigned to the Universal Request Routing group can:

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Default assignment groups (continued)

Group	Description
	• Resolve the Universal Request at the parent level. • Assign the Universal Request to another assignment group, such as HR routing group or IT routing group.

Universal Request states and reasons

The Universal Request (UR) state is determined by the state of the primary ticket. The primary ticket for a UR is a child department ticket, such as an IT incident or a HR case. A Universal Request can have only one primary ticket at a time.

Given are some examples of the impact of the primary ticket on UR:

- If there is no primary ticket, then the Standard Ticket configuration for UR determines requester page view of the UR ticket.
- If a child IT incident is the primary ticket of a UR, then the Incident Standard Ticket configuration determines the requester page view of the UR ticket.
- If a child HR case is the primary ticket of a UR, then the Case Standard Ticket configuration determines the requester page view of the UR ticket.

UR states and state reasons

The Universal Request (UR) state describes where in the life cycle the UR request is.

UR states and reasons

States	Description
New	The UR request is created and is ready to be triaged. This is the first state in the life cycle.
In Progress	The state when the UR is being triaged and worked on. For example, the state can be In progress because of the following state reasons: • **Triaging**: Is being triaged by the routing agent. • **Primary Ticket - In Progress**: Primary task is currently work in progress. • **Confirm Response**: Waiting on the routing agent's confirmation on the resolution provided by the department agent.
Awaiting Response	The state when there is a user action is pending. For example, the possible state reasons are one of the following:

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UR states and reasons (continued)

States	Description
	• **Action Required**: When the agent has requested the user for some action or information. • **Accept Resolution**: When the agent has requested the requester for accepting the resolution.
Closed	The UR is closed.
Canceled	The UR is canceled. **Note:** Requesters can cancel a UR only if there are no active or closed primary tickets attached to it. Also, the state of UR must be either **New** or **In Progress**.



Mobile experience for Universal Request

Create universal requests from a mobile device using the Now Mobile application. Stay connected and access information in real time.

A requester can use the mobile device to create universal requests by tapping on the **Get help** link within the context menu of the **Services** tab.

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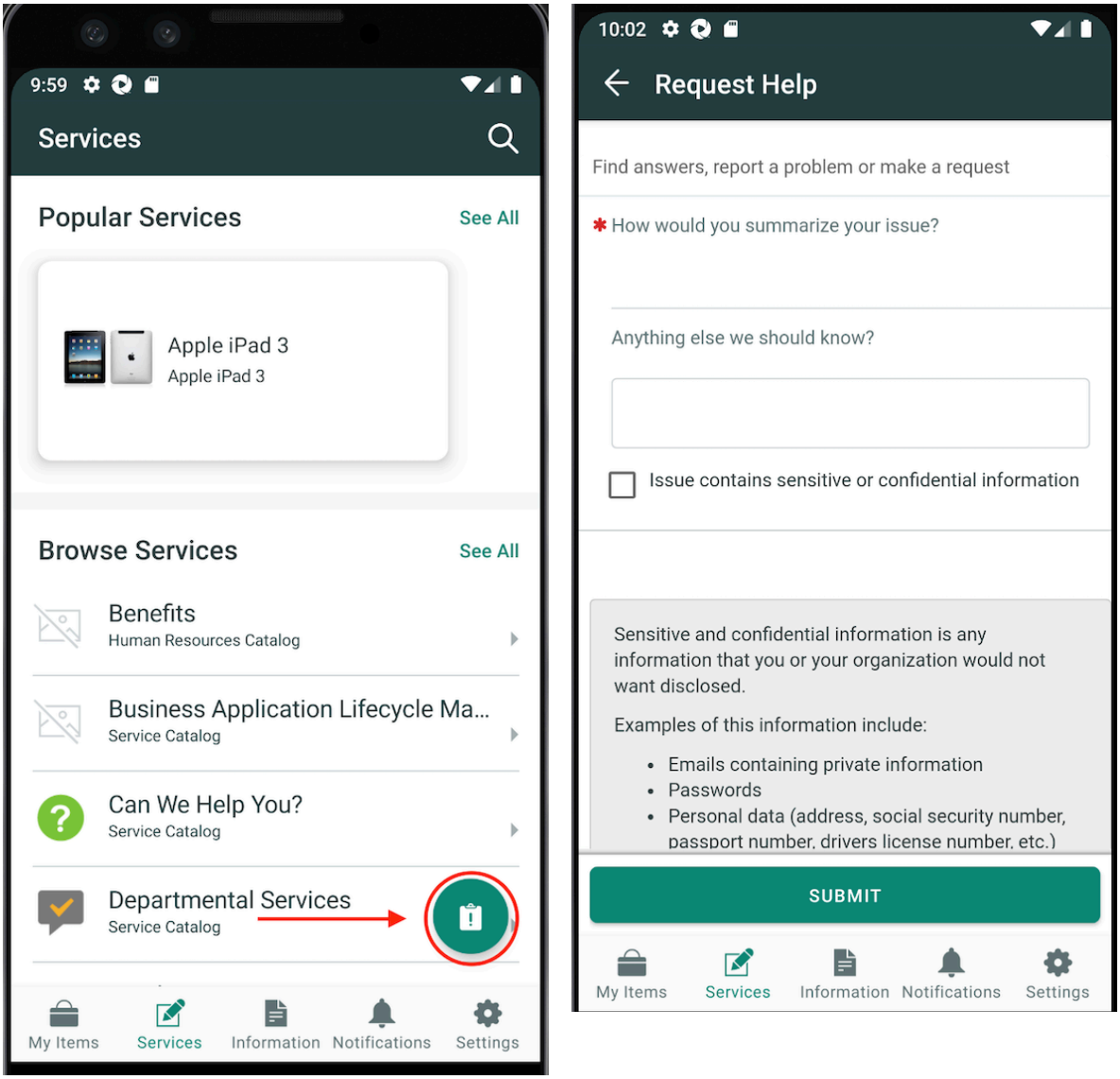

The mobile experience for Universal Request provides a snapshot of the Universal Requests created in the list view along with their statuses. Tapping on the Universal Request takes you to the detailed view of the request with the updates.

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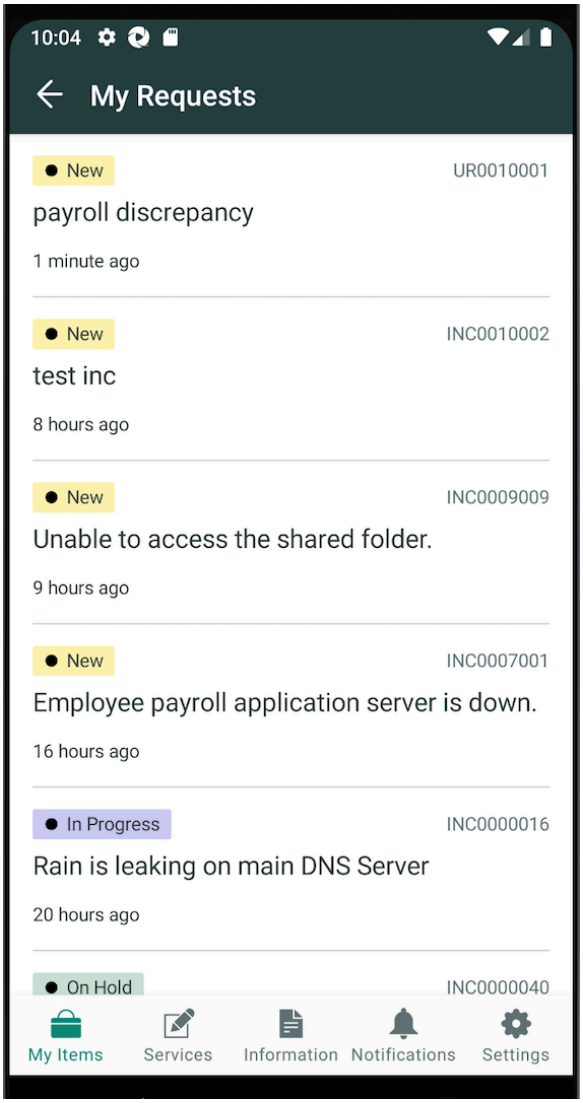

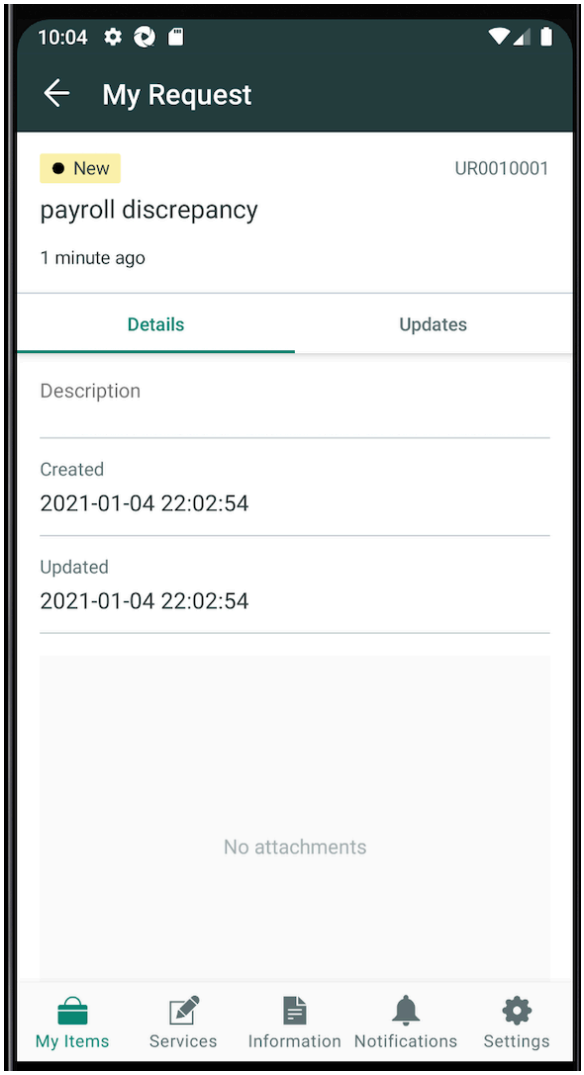

Requesters can cancel a UR from the mobile device and enter the reason for canceling the request if they no longer need it or they have already resolved it. When an UR is canceled, email notifications are sent to the requester as well as to the agent working on the request.

Note: Requesters can cancel a UR only if there are no active or closed primary tickets attached to it. Also, the state of UR must be either **New** or **In Progress**.

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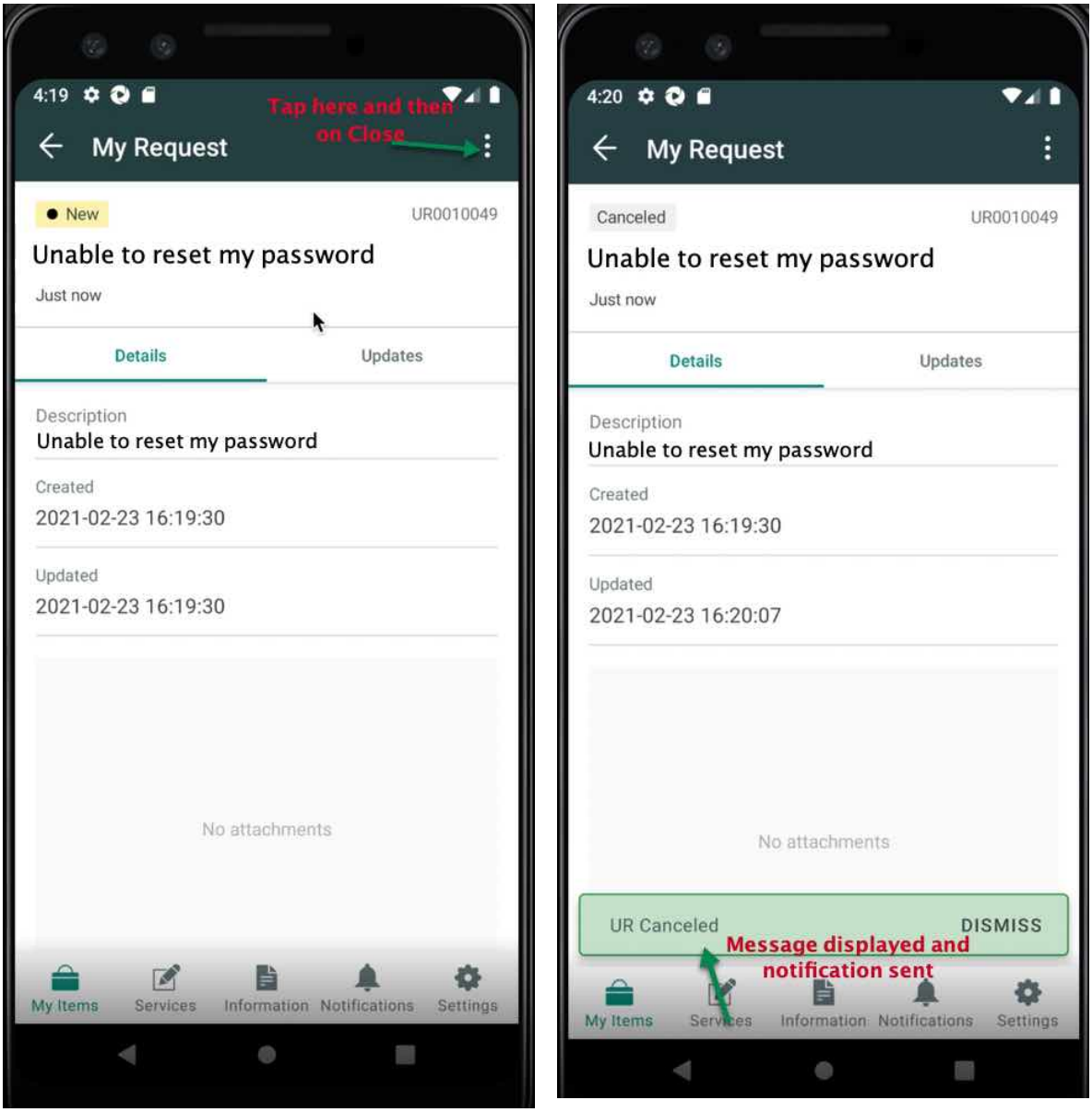

Guided setup for Universal Request

Before you start using the ServiceNow® Universal Request application in your organization, you must set up Universal Request. Work with your stakeholders to define requirements for setting up the application effectively to meet the needs of your organization.

Requirement

Role required: admin.

Before you begin

Meet with stakeholders and determine the following requirements:

- Universal Request workflow for your organization
- Users, groups, and roles
- Services and departments to leverage Universal Request

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What to do next

The Universal Request application provides two guided setups to configure the application on the ServiceNow instance.

- **Guided setup for UR** to configure the Universal Request application.
- **Guided setup for Services** to configure your custom departmental applications in UR.

Using guided setup

Use the Universal Request guided setup and complete tasks in sequence to configure UR and your custom departmental application in UR.

Navigate to **Universal Request** > **Administration**, open the following guided setups, and complete the tasks.

- **Guided setup for UR**
- **Guided setup for Services**

Setting up and configuring Universal Request

Set up and configure Universal Request to enable agents to create universal requests and work on them to resolve employee issues.

Understand the given information before you set up and configure to use Universal Request.

Universal Request application uses HTML mark-up to render comments that are copied between UR and the child tickets. This feature uses [CODE] tags, which are controlled by the *glide.ui.security.allow_codetag* property value that is set to true by default. If you change this property value to false, comments may not render properly, and HTML tags might appear in your comments.

Universal Request plugins

Request and activate the following plugins to use Universal Request in your application.

Activate Universal Request

You can activate the Universal Request plugin (com.snc.universal_request) if you have the admin role. This plugin is not active by default, and you must install it to use the Universal Request application. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin
Role required: admin

About this task
The Universal Request plugin activates these related plugins if they are not already active.

Plugins for Universal Request

Plugin	Description
Universal Request: Reporting [com.snc.universal_request.reporting]	To create and view various Universal Request reports.
Agent Workspace	To create, view, and resolve universal requests from the Agent Workspace.

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Plugins for Universal Request (continued)

Plugin	Description
[com.agent_workspace]	
Agent Assist Recommendation [com.snc.agent_recommend]	To use Agent Assist recommendation in Agent Workspace.
Universal Request Core [com.snc.universal_request_core]	Contains the data model changes on the Task table to support the Universal Request application.
Service Catalog - Workspace [com.glideapp.servicecatalog.workspace]	To use Service Catalog in Agent Workspace.
Service Portal - Standard Ticket [com.glideapp.servicecatalog.standard_ticket]	To enable the Standard Ticket page for your Service Portal.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Australia)

Components installed with Universal Request

Several types of components are installed with activation of the Universal Request plugin, including tables, user roles, and scheduled jobs.

Demo data is available for this feature.

Roles installed

Roles in Universal Request

Role title [name]	Description	Contains roles
Routing Agent	Responsible for initial triaging	sn_uni_req.universal_request_write

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Roles in Universal Request (continued)

Role title [name]	Description	Contains roles
[sn_uni_req.routing_agent]	of the universal requests and routing them to right department or queues. **Note:** Only users with this role can have universal requests assigned to them.	
Universal Request read [sn_uni_req.universal_request_read]	Access to view the Universal Request records.	None
Universal Request write [sn_uni_req.universal_request_write]	Access to create or update the universal request in the application.	sn_uni_req.universal_request_read
Universal Request admin [sn_uni_req.ur_admin]	View the configuration of the Universal Request application.	sn_uni_req.routing_agent
Universal Request Service Owner [sn_uni_req.ur_service_owner]	Access the process overview reports of the Universal Request application.	None
Universal Request SensitiveInfo Agent [sn_uni_req.sensitiveinfo_agent]	View and work on the tickets that are marked as **Restricted**. Restricted tickets contain sensitive information and are secured from general viewing.	None

Tables installed

Tables in Universal Request

Table	Description
Universal Request	Stores the Universal Request records and the state reasons.

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Tables in Universal Request (continued)

Table	Description
[universal_request]	
Transfer Configuration [universal_request_route_conf]	Holds the routing configuration that is used when the task is routed.
Service Assignment Group [universal_request_service_assignment_group]	Stores the assignment group details of different services configured in UR.
State Mapping [universal_request_state_mapping]	Holds the state mapping configuration that maps the department ticket states to the Universal Request states.
Service Configuration [universal_request_service_conf]	Stores the details of the services that are configured in the Universal Request application.
Service set [universal_request_service_set]	Stores the service set (department) details of the organization.
Service Set Assignment Group [universal_request_service_set_assignment_group]	Stores the assignment group details of the service set (department).
SLA Breakdown by Primary ticket and Assignment group [sla_breakdown_by_primary_ticket_and_group]	
Mapping Configuration [universal_request_transfer_mapping]	
Transfer Fields Mapping [universal_request_transfer_fields_mapping]	
Universal Request Priority Data Lookup [dl_universal_request_priority]	
Universal Request Activity Log [universal_request_activity_log]	

Activate Universal Request Advanced Work Assignment

You can activate the Universal Request: Advanced Work Assignment plugin (com.snc.universal_request.awa) if you have the admin role. Activating this plugin enables you to use Advanced Work Assignment and automatically assign work items to your agents, based on their availability in the Universal Request application. This plugin includes demo data and activates related plugins if they are not already active.

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Before you begin

Note: The Universal Request: Advanced Work Assignment plugin (com.snc.universal_request.awa) plugin requires a separate subscription and must be activated by a ServiceNow personnel.

Before installing the Universal Request: Advanced Work Assignment plugin (com.snc.universal_request.awa) plugin, install the Universal Request plugin. For more information, see Activate Universal Request.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Australia)

Activate Universal Request Integration for Incident management

You can activate the Universal Request: Integration for Incident management plugin (com.snc.incident.universal_request) if you have the admin role. Activating this plugin enables ServiceNow Incident Management application integration with Universal Request. This plugin includes demo data and activates related plugins if they are not already active.

About this task

This plugin allows the Incident (incident) table to participate in Universal Request (UR) flows. The plugin activation ensures incidents can be created, tracked, and managed within the same framework used for URs and Universal Tasks—streamlining multi-step, cross-functional work.

Before you begin

Before installing the Universal Request Integration for Incident management (com.snc.incident.universal_request) plugin, install the Universal Request plugin.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

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3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Australia)

Activate Universal Request NLU Model for Virtual Agent Conversations

You can activate the Universal Request: NLU Model for Virtual Agent Conversations plugin (com.snc.universal_request.nlu) if you have the admin role. Activating this plugin allows you to use NLU for virtual agent conversations in Universal Request. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Note: The Universal Request: NLU Model for Virtual Agent Conversations plugin (com.snc.universal_request.nlu) plugin requires a separate subscription and must be activated by a ServiceNow personnel.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Australia)

Activate Universal Request Reporting

You can activate the Universal Request: Reporting plugin (com.snc.universal_request.reporting) if you have the admin role. Activate this plugin to use reports in Universal Request. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Australia)

Activate Universal Request Virtual Agent Conversations

You can activate the Universal Request: Virtual Agent Conversations plugin (com.snc.universal_request.va) if you have the admin role. Activate this plugin to set up and use Virtual Agent in Universal Request. This plugin includes demo data and activates related plugins if they are not already active.

Before you begin

Note: The Universal Request: Virtual Agent Conversations plugin (com.snc.universal_request.va) plugin requires a separate subscription and must be activated by a ServiceNow personnel.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

List of plugins (Australia)

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Activate Predictive Intelligence for Universal Request

You can activate the Predictive Intelligence for Universal Request plugin (com.snc.universal_request.ml) to use machine-learning solutions in the Universal Request application, if you have the admin role.

Before you begin

Role required: admin

Note: The Predictive Intelligence for Universal Request plugin (com.snc.universal_request.ml) plugin requires a separate subscription and must be activated by a ServiceNow personnel.

The application includes demo data and installs related applications and plugins if they are not already installed.

- Predictive Intelligence for Universal Request requires the following plugins. Ensure that these plugins are activated before you install this plugin.

  Required ServiceNow plugins

  Predictive Intelligence

  Install this plugin to enable the creation of machine learning solutions using data in your instance. The plugin provides various capabilities and solution types for training the system to predict, recommend, and drive data outcomes. A trained solution can be invoked by any application through the use of a prediction API..

  Universal Request

  Install this plugin to use the Universal Request application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Predictive Intelligence for Universal Request plugin (com.snc.universal_request.ml) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Activate Performance Analytics and Reporting for Universal Request

You can activate the Performance Analytics and Reporting for Universal Request plugin (com.snc.universal_request.pa) for Universal Request if you have the admin role.

Before you begin

Role required: admin.

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About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Performance Analytics and Reporting for Universal Request plugin (com.snc.universal_request.pa) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.
3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Configuring Universal Request

Set up the Universal Request features, components, and integrations that you need to set up your organization to provide service and support to your employees and agents.

Configure users and groups

A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members.

Before you begin
Role required: admin

About this task
Group information is used across most processes in the ServiceNow AI Platform for assigning work to teams and requesting approvals. Any rule that is applied to a UR group is automatically assigned to all the group members, for example, roles and assignment rules.

Procedure

- You can import existing users and groups using guided setup.
  For more information, see Guided setup for Universal Request.
- You can create new users and groups using the *ServiceNow AI Platform* user administration feature.
  - Create a user
  - Create a user group
  - Add a user to a group

Assign roles to UR users

Roles control access to features, capabilities, and data in the Universal Request application.

Before you begin
Role required: admin
Before you can assign roles to your users, make sure that users and groups have already been configured. For more information, see Configure users and groups.

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About this task

You can assign roles to individual users or groups. Apply roles to groups and the members of those groups inherit those roles. Universal Request application provides a list of default roles and groups that can be used by your organization. For more information, see Universal Request roles and groups.

Procedure

- You can assign roles to users and groups using guided setup.
  For more information, see Guided setup for Universal Request.
- You can also assign roles to users and groups using the *ServiceNow AI Platform* user administration feature.
  - Assign a role to a user
  - Assign a role to a group

Assign delegated developer role to Universal Request administrator

For a Universal Request administrator [sn_uni_req.ur_admin] to perform some platform duties, the delegated developer role must be added.

Before you begin

Role required: admin with sn_uni_req.ur_admin

Universal Request administrator with delegated developer role

The Universal Request administrator with the delegated developer role can:

- Add and update script includes.
- Add and update ACLs.
- Configure forms.
- Configure related lists.

Procedure

1. Log in as admin.
2. From the Filter navigator, enter **sys_store_app.list**.
   The **Store Application** list appears.
3. Select **Universal Request**.
4. Under **Related Links**, select **Manage Developers**.
5. Ensure **Developers** is highlighted.
6. Enter the name of the Universal Request administrator.
7. Select all items (green bar moves to the left) to grant permission.
8. Select **Save**.
9. Log out and log back in to ensure that the changes take effect.

Service Level Agreement configuration for Universal Request

View, modify, or create Service Level Agreement (SLA) definitions that is provided for the Universal Request application to make sure that the requests are closed within a defined time frame.

Before you begin

Role required: admin

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About this task
The SLA definitions created for the Universal Request are for the UR and does not depend on the SLAs defined for the individual child tasks of the specific departments.

Procedure
1. Navigate to **All** > **Service Level Management** > **SLA** > **SLA definitions**.
   List of all the SLA definitions available is displayed.
2. Click **New** to create an SLA definition for your tasks.
3. On the form, fill the fields.
   For field descriptions and detailed instructions, see Create an SLA definition.

Result
The SLA definition is created for the specified task table.

Transfer configuration

You can enable agents to transfer department-specific tickets, such as an incident ticket or an HR case back to the Universal Request (UR), to another department, or service. This transfer configuration allows you to determine what happens to the departmental ticket when the request is transferred to another department or back to UR.

Before you begin
Role required: admin

About this task
The transfer configuration has the following configurations.

Transfer Information

Determines the state and template to apply on the department ticket when a department ticket is transferred.

Closure Information

Determines the final closure state and template to apply on the department ticket associated with a UR that is closed.

When you transfer a department ticket, you can transfer it with one of the following reasons:

Transfer with resolution

When the request is resolved and transferred back to UR, to the specific department, or service.

Transfer without resolution

When the request is not resolved or does not belong to the specific department and is transferred back to UR, to the specific department, or service.

For example, if an incident ticket is transferred without resolution, in the **Transfer Information** tab, you can configure the **Transfer state** as `Canceled`. In the **Closure Information** tab, you can configure the closed state of the incident ticket when the UR is closed.

To perform this transfer action, you must configure the transfer configuration details in the Universal Request application.

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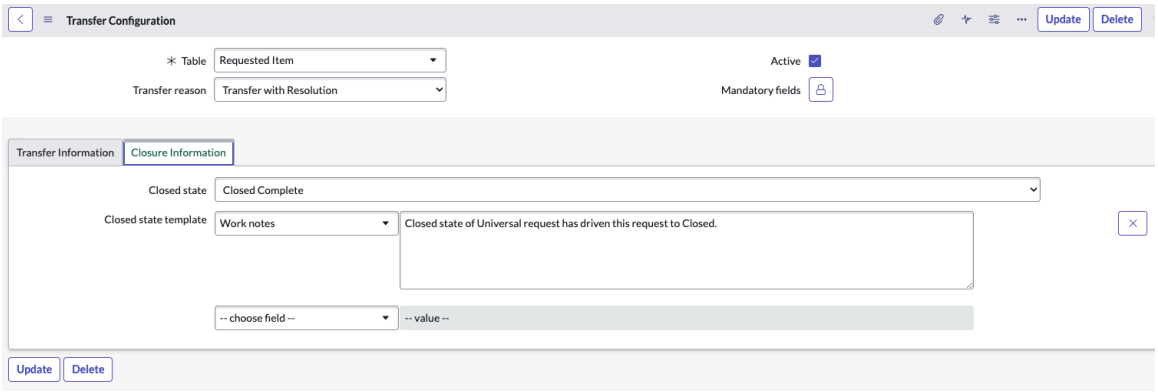

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Transfer Configuration**.
2. Open and edit an existing configuration or click **New** for a new configuration record.
3. On the form, fill in the fields.
   For more information on the field descriptions, see Transfer configuration form.

Configure Dynamic translation for Universal Request

Activate and configure the Dynamic Translation plugin to translate the text on a Universal Request record.

Before you begin

Role required: admin

About this task

After activating the Dynamic Translation plugin, you can configure one of the translator service spokes available by default. You can also configure a custom translator service provider.
For more information on translation service providers, see Integration with other translation services.

Procedure

1. Activate the Dynamic Translation plugin.
   For more information, see Activate Dynamic Translation.
2. Configure and activate the translator configuration for the spoke you are using.
   Available spokes include the following.
   - Configure Microsoft Azure Translator Service spoke
   - Configure Google Cloud Translator Service spoke
3. Activate the I18N plugin for the specific language you want to translate to.
   For a list of available languages, see Activate a Language.

Configure Chat queues

Configure chat queues to enable users to communicate with the agents for assistance on their request.

You can configure chat queues using one of the given options.

- Advanced Work Assignment for agent workspace
- Connect Chat support

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By default, a sample Universal Request Chat Queue is available for both the options. You can create your own queue or customize the default queue.

Configure Advanced Work Assignment chat queue

Create or modify the default chat queue for UR in Advanced Work Assignment automatically assign work items to your agents, based on their availability.

Before you begin

Role required: admin
Ensure that you have activated the Agent Chat (com.glide.interaction.awa) plugin.

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Queues**.
2. Perform any of the following task.
   - Open the **Universal Request Chat Queue** chat queue and modify it
   - Create the **Assignment Eligibility** record for the chat queue modifying the application provided Universal Request assignment rule.
   - Click **New** to create a new record.

   For more information, see Advanced Work Assignment.
3. Click **Submit**.

Configure Connect chat support queue

Connect Support is a real-time messaging tool that enables support agents to easily track their support cases, find solutions, and resolve problems quickly.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Connect** > **Support Administration** > **Queues**.
2. Click **New** or open the default **Universal Request Chat queue**.
3. On the form, update or fill in the details.
   For more information, see Administer Connect Support queues topic on the product documentation site.
4. Click **Submit**.

Predictive Intelligence for Universal Request

The Predictive Intelligence for Universal Request uses machine-learning algorithms for the auto-assignment of universal requests and to find similar knowledge articles and closed universal requests.

Predictive Intelligence for Universal Request has the following benefits:

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- Use of machine learning algorithms to predict the assignment group across various departments based on the data provided by the requester in the short description and description fields of the request.
- Use of machine learning similarity solution to provide recommendations for similar Knowledge Base articles and similar closed Universal Request. These recommendations are based on the data provided in the short description and description fields of the request, and help agents to resolve universal requests quickly.

Solution definitions for Predictive Intelligence for Universal Request

The solution definition for Predictive Intelligence for Universal Request is available when you activate Predictive Intelligence plugin (com.glide.platform_ml) and Predictive Intelligence for Universal Request (com.snc.universal_request.ml) plugins. You can customize the solution definition to meet your business requirements.

Solution definition for Universal Request

Solution definition	Solution type	Description
Universal Request Categorization	Classification	• Predicts the assignment group from the short description and description of a Universal Request. • Runs a business rule to create service level tickets using the prediction. The service level tickets that are created will be associated with the universal request.
Similar Knowledge Articles for UR	Similarity	Predicts similar knowledge base articles based on the short description and description of a Universal Request.
Similar closed Universal Request	Similarity	Predicts closed Universal Request that have similar short description, description, and assignment group.
Identify sensitive information in UR	Classification	Identifies and predicts that the UR is sensitive based on the short description and description of the request. It also marks the request as restricted.

Train the classification solution to predict the assignment group

Train the Universal Request classification solution definition to identify and predict an assignment group using the short description and create service level tickets that are associated with the universal request.

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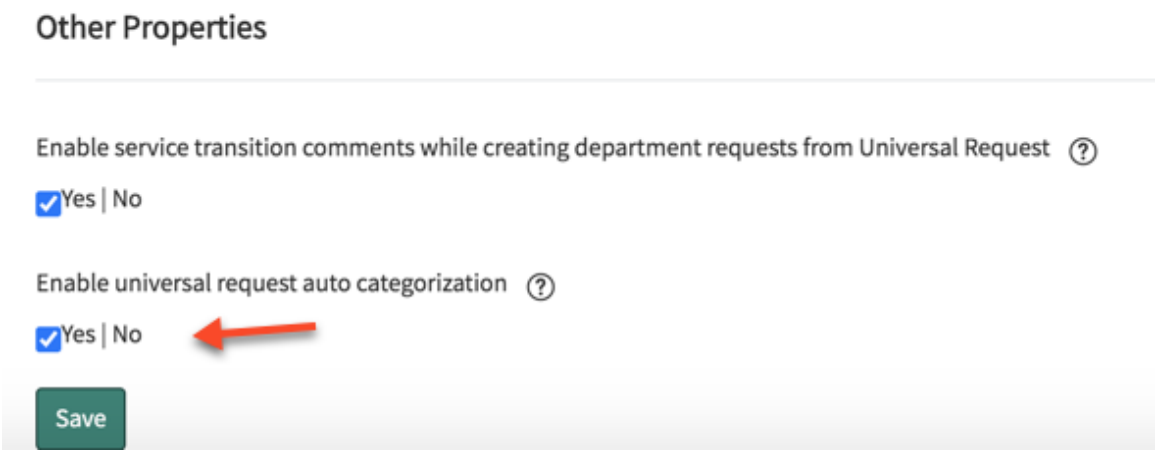
Before you begin

Role required: admin

Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for Universal Request (com.snc.universal_request.ml) plugins.

Set the *`Enable universal request auto categorization`* property to true by navigating to **Universal Request** > **Administration** > **Properties**. Enabling this property enables the application to use the **Universal Request Classification solution** for UR.



Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. In the Classification Definitions list, search for and select the Universal Request Categorization (ml_universal_request_categorization) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Classification Definition form fields, see Create and train classification solution.

Train the similarity solution for similar knowledge articles

Train the Similar Knowledge articles for UR solution definition to identify and predict knowledge articles using the short description. When an agent opens a universal request, similar knowledge articles are displayed in the Related Search section of the Universal Request record.

Before you begin

Role required: admin

Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for (com.snc.universal_request.ml) plugins are activated.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Knowledge articles for UR (ml_sn_sn_uni_req_global_similar_knowledge-articles-for-ur) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Similarity Definition form fields, see Create and train a similarity solution.

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Train the similarity solution for similar closed Universal Requests

Train the Similar Closed Universal Request solution definition to identify and predict similar Universal Requests that are closed based on the short description, description, and the assignment group of the Universal Request created. When an agent opens a universal request, similar closed universal requests can be searched in the Related Search section of the Universal Request record.

Before you begin

Role required: admin or sn_un_req.ur_admin
Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for (com.snc.universal_request.ml) plugins are activated.

This solution is available only if you enable the **Enable to view similar closed Universal Request recommendations** (sn_uni_req.similar_closed_universal_request) property. For more information on this property, see Universal Request properties.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Closed Universal Request (ml_x_snc_sn_uni_req_global_similar_closed_universal_request) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Similarity Definition form fields, see Create and train a similarity solution.

Train the classification solution to identify UR with sensitive information

Train the Universal Request classification solution definition to identify and predict universal request with sensitive information using the short description and description. The solution identifies and marks the UR as restricted, allowing only agents with access or from the assignment group to work on the request.

Before you begin

Role required: admin
Ensure that you have installed Predictive Intelligence (com.glide.platform_ml) and Predictive Intelligence for (com.snc.universal_request.ml) plugins are activated.

Set the *Enable to auto-restrict requests with sensitive information* property to true by navigating to **Universal Request** > **Administration** > **Properties**. Enabling this property enables the application to use the **Universal Request Classification solution** for UR.

Note: A minimum of ten thousand records are needed to train the classifications.

Procedure

1. Navigate to **Predictive Intelligence** > **Classification** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the UR Sensitive Classification (ml_sn_sn_uni_req_ml_global_ur_sensitive_classification) solution.
3. On the form, verify the default field values and customize the solution as required.
   For more information about the Classification Definition form fields, see Create and train classification solution.

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Set up Virtual Agent for Universal Request

Use Virtual Agent (VA) capabilities to provide a better user experience for your chat channel using the ServiceNow® Natural Language Understanding (NLU) model. Publish and use the default Virtual Agent topics for Universal Request.

Before you begin

To use VA capabilities, you must activate the following plugins:

- Activate the Universal Request: Virtual Agent Conversations plugin (com.snc.universal_request.va) to set up and use Virtual Agent in Universal Request. This plugin installs the Virtual Agent topics that must be made active. By default, the topics are set to inactive.
- Activate the Universal Request: NLU Model for Virtual Agent Conversations plugin (com.snc.universal_request.nlu) to set up and use the NLU model for Virtual Agent conversations.

Role required: admin

About this task

Activate the Virtual Agent topics for Universal Request.

You can also copy and modify the default topics or create your own topics to use during the chatbot conversations. For more information on creating a topic, see Create a Virtual Agent topic.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Virtual Agent** > **Designer**.
2. Enter `Universal Request` in the **Category** field.
   The following topics and topic blocks are displayed:
   - Employee Help Request (Template)
   - Track Universal Request Status (Template)
   - Update UR (Template)
3. Select the **Employee Help Request (Template)** topic to open it.
4. On the header section, select **Publish**.
   The topic is made available and active in the chat window.
5. Repeat this procedure to open and publish the Track Universal Request Status (Template) and Update UR (Template) topics.

Enable Natural Language Understanding model for Universal Request topic

Apply the Natural Language Understanding vocabulary in the Universal Request application to help the system to understand human-expressed language.

Before you begin

Role required: admin
To use the Universal Request topic for your chatbot conversations, select and enable the Natural Language Understanding (NLU) model. For more information, see Configure Natural Language Understanding in Virtual Agent.

Procedure

1. Navigate to **All** > **Collaboration** > **Virtual Agent** > **General Settings**.
2. On the **NLU Settings** tab, select **Enable NLU in Virtual Agent** to make it active.

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3. Select `ServiceNow NLU` in the **NLU service provider** drop-down list.
4. Select **Save**.

Standard Ticket page for Universal Request

The Universal Request standard ticket page enables requesters to view the details of their universal requests from the Service Portal.

A requester can view the aggregated and simplified view of the UR activity and all activities from one or more child department tickets (primary tickets). Using the UR standard ticket page has the following advantages:

- A ticket reference number (UR number) that is always consistent for the requester, even when the request is transferred between various departments.
- The UR state details that is derived from the mapping between the UR states and the states of the primary ticket associated with UR. With this state mapping enabled, the requester sees only the UR state.
- An activity stream that shows a logical and sequential record of comments to and from any fulfiller who worked on the UR or its primary tickets.
- An info region that displays department-specific fields of the current primary ticket. For example, configure the page to show **Opened For** and **Subject Person** fields from a child HR case, or to show **Caller** and **Urgency** fields from a child IT incident.

The Standard ticket page configuration for UR tickets enables you to determine what you want to display as a view. By default, a Universal Request Standard Ticket configuration is available that you can use and customize. Information displayed in different sections of a standard ticket page depends on the individual request type.

Note: If you are upgrading from a previous release and want to use the Standard Ticket page for your department, ensure that you enable the *Page Route map* in Service Portal. For more information, see Enable the page route map for standard ticket page.

UI components of Universal Request standard ticket page

Sl #	UI Component	Information displayed
1	Header section	Displays the information submitted for the Universal Request record, such as the UR request number, created and updated details of the request, and the current status. This section is not a configurable section. **Updated** field displays the details of the last activity time of the primary ticket if it exists. If there is no primary ticket attached, the **Updated** field displays the last activity time of the Universal Request.
2	Number	Displays the unique UR number that identifies the request.
3	State	Shows the state of the Universal Request.
4	Short Description	Always displays the short description of the Universal Request submitted.

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UI components of Universal Request standard ticket page (continued)

SI #	UI Component	Information displayed
5	Actions region	Actions that are configured as part of the primary ticket page. If the primary ticket does not exist, then the default actions of the Universal Request are displayed. The default UR actions are: • **Accept/Reject resolution**: To review the resolution provided and choose to either accept or reject the resolution. • **Close**: To cancel the UR if the UR is no longer required. **Note:** An UR can be canceled only if there are no active or closed primary tickets attached to it. Also, the state of UR must be either **New** or **In Progress**.
6	Info region	Configurable fields that are part of the primary ticket. If the primary ticket does not exist, then the default fields configured for Universal Request are displayed.
7	Tabs section	Tabs that are configured as part of the primary ticket page. If the primary ticket does not exist, then the default tabs, such as the **Activity** and **Attachments** are displayed.
9	Activity stream	Displays the activity and attachments from UR, and all the previously associated primary tickets in a sequential order.

When a routing agent chooses not to share additional comments or attachments while routing, a system-generated message displays in the header and activity stream. However, the requester can view all comments in the activity stream.

When a user clicks to view the Standard Ticket page from a department ticket that was previously a primary ticket of the UR, then the Standard Ticket configuration validates and displays a message asking the user to open the latest page that displays only the activity streams and attachments. The following image displays the message containing a link to open the latest activity stream.

Related topics

Configure Standard Ticket page for Universal Request

Configure Standard Ticket page for Universal Request

Use the Standard ticket page configuration for Universal Request to provide a consistent layout across all tickets raised and associated.

Before you begin

Role required: admin

By default, a standard ticket configuration is provided for UR. You can customize the layout or create a new ticket layout as per your organizational requirements.

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
   A list of default ticket configurations is displayed.

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2. Click and open **universal request** configuration.
3. Click the link **here** that appears in the message displayed to edit the record.
4. Modify the form field as per your requirements.
5. Click **Update**.
6. **Optional:** Click **New** to create your custom configuration.
   For more information, see Standard ticket page.

Configure service to use Universal Request

Configure the Universal Request application with any service to manage requests across multiple services under one unified request. Using Universal Request integrated with your service helps deliver a seamless employee experience in your organization.

Configure mappings

Configure the target table and field mappings to create a department level ticket and to set the fields according to the field mappings.

Before you begin

Role required: ur_admin

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Mapping Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information, see Mapping configuration form.
4. Click **Submit**.

What to do next

Post this configuration, map the service fields with that of the UR fields to enable a seamless transfer of tickets. For more information, see Map UR fields with target table fields.

Map UR fields with target table fields

Define the fields that you want to map between the universal request and the target table fields that you already configured. This configuration enables you to copy the values of mapped fields from the universal request to the new ticket, and vice versa.

Before you begin

Role required: ur_admin

To map automatically the fields, select **Map fields automatically** related link. This action maps all fields that are common between UR and the service ticket and vice versa.

Note: Field mappings will take precedence over transfer template configuration, if you've already defined them.

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Mapping Configuration**.
2. Open the configuration for which you want to map the fields.

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Mapping type	Description and action
Direct transfer mappings	Map the fields to create service level tickets when a ticket is transferred from one depart ment to another. On the **Transfer Mappings** tab, **a.** Select **New**. **b.** Select the **Source field** of the universal re quest. **c.** Select the **Target field** that you want to map with the service ticket. **d.** Select **Submit**.
Associated ticket mappings	Map the fields to create an associated ticket for universal request. On the **Associated ticket Mappings** tab, **a.** Select **New**. **b.** Select the **Source field** of the universal re quest. **c.** Select the **Target field** that you want to map with the service ticket. **d.** Select **Submit**.
Create UR mappings	Map the fields to create automatically a uni versal request when a request is raised from any of the available channels. **Note:** Before you perform this step, en sure that you've created a new Before in sert business rule to call the respective API. For more information, see Create a business rule to automatically create uni versal request. On the **Create UR Mappings** tab, **a.** Select **New**. **b.** Select the **Source field** of the service table. **c.** Select the **Target field** that you want to map with the universal request. **d.** Select **Submit**.

Note: The **Type** field indicates the type field mapping selected, such as Transfer, Associated Ticket, or Create UR.

3. Select **Update**.

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Create a service set

Create your service set (department) name in the Universal Request (UR) application to use the UR capabilities for a specific service set in your organization. Service sets are the various departments in your organization.

Before you begin

Role required: admin

Your organisation must have one service set without any services that is marked as a Universal Set. The Universal Set acts as the default department that receives new Universal Requests that are not routed to a specific department. This service set makes sure that when a UR is created it is assigned to the assignment group of the service set under one of the following conditions.

- A UR is created from Request Help with no department selected. For example, when an employee creates a UR from Request Help with no department selected and when the automatic assignment is not suggested by the ML routing algorithm, then the UR is assigned to the Service Set that is marked as Universal Set.
- When a UR is transferred with the **I'm not sure** option. For example, when a UR is transferred by a department agent, and the agent is unsure of the department to transfer the request to, the agent can select **I'm not sure** in the department field. In this case, the UR is routed to the Service Set that is marked as the Universal Set.

Note: You can have only one service set marked as a Universal Set for your organization.

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Service Sets**.
2. Click **New**.
3. Enter your service specific department name.
4. Select the **Universal Set** check box.
   If this check box is selected, the new service set is considered as a Universal Set.
5. Select the **Mapping Configuration** that you want to define for your service set.
6. Click **Submit**.

Create your service-specific assignment groups

Set up your service-specific groups and assign the necessary roles and users. The users in the group inherit the roles of the group, so you do not have to assign roles to each user separately.

Before you begin

Role required: admin

About this task

Here are a few good practices for creating groups:

- Create one group for administrators and assign the admin role to this group only.
- Create as many groups as needed in your organization. For example, you can create a HR department specific assignment group or IT specific group. Assign the necessary users to those groups, and then assign the staff role to those groups.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Click **New**.
3. On the form, fill in the fields.

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For more information, see Create a user group.

4. Click the lock icon beside the **Type** field.
   If the field is not visible, configure the form to add it.
   The **Type** field expands.
5. Click the reference lookup icon and select the **[application]** type.
6. Right-click the form header and select **Save**.
7. Add the roles to the **Roles** related list.
8. Add users to the **Group Member's** related list.
9. Click **Update**.

Assign assignment group to service sets

After creating your service-specific assignment groups, assign them to the service sets. Assigning assignment groups to the various departmental service sets facilitates in automatically routing universal requests to the right agents (assignment group) within a specific department (service set).

Before you begin
Role required: admin

About this task
Also, after triaging, agents can also transfer universal requests and department tickets to the appropriate agents (assignment group) within a specific department (service set).

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Service Set Assignment Groups**.
2. Select the **Service Set** from the look-up list.
3. Select the **Assignment Group** for the service set.
4. Click **Submit**.

Create your service for Universal Request

Register your service name for your service specific table and associate it with a service set (department) to use the Universal Request capabilities for a specific service in your organization.

Before you begin
Role required: admin

About this task
Service categorizes the application according to the area of the work within the service set (department) in the organization.

Note: By default, HR cases and IT incidents are configured as services in the Universal Request application. This step can be ignored.

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **Service Configuration**.
2. Click **New** to register your service.
3. On the form, enter the **Service Name**.
4. Select the **Service Table** from the list of available tables.

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5. Select the **Service Set** from the list of available service sets registered for your organization.
6. Click **Submit**.

Assign assignment group to your service

After creating the services for your service set (department), assign the assignment groups to the services in the service sets to enable agents to transfer tickets to the appropriate routing group.

Before you begin
Role required: admin

About this task
Assigning assignment groups to the various departmental service sets facilitates automatic routing of universal requests to the right agents (assignment group) within a specific department (service set). Also, after triaging, agents can transfer universal requests and department tickets to the appropriate agents (assignment group) within a specific department (service set).

Procedure
1. Navigate to **All** > **Universal Request** > **Administration** > **Service Assignment Groups**.
2. Select the **Assignment Group** for the service set.
3. Select the **Service** from the look-up list.
4. Click **Submit**.

Create service specific UI actions

Create a UI action or modify an existing one to enable your service to create department tickets under a universal request.

Before you begin
Role required: admin
Administrators and users with the ui_action_admin role can define UI actions.

About this task
For example, consider a scenario when a Tier 1 agent of a service department receives a universal request, and is not able to resolve it. The agent escalates the request to another department or to an agent within the same department. In this case, the Tier 1 agent uses the **Create case** or similarly labeled action to create a new case within the service (department). This case can then be routed to the appropriate assignment group for resolution.

To perform this action, you must create a UI action for your service.

Procedure
1. Navigate to **All** > **System Definition** > **UI Actions**.
   A list of all UI actions specific to Universal Request table appears.
2. Click **New** or open an existing record.

   Note: For a new UI action, ensure that you always select the Universal Request table.

3. On the form, fill in the fields to define the UI action.
   For more information, see Create a UI action.

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Register application administration enabled scoped application

If your application is an application admin enabled scoped application, register the application with Universal Request (UR) to make your application's service and service set data available for the Universal Request application to work.

Before you begin
Role required: admin

About this task
After you configure your service, you must perform these steps and create the following ACL-inheritance entries. This enables Universal Request to use your application's service and service set data.

Only UR administrator [sn_uni_req.ur_admin] can assign scoped UR roles.

To configure your system, you must log in as a System Administrator [admin]. The UR Administrator [sn_uni_req.ur_admin] role is contained in the System Administrator [admin] role. The combination of these two roles allows a user to perform all tasks associated with configuring your system.

After system configuration, ensure that only the UR Administrator [sn_uni_req.ur_admin] role has access to sensitive information. Remove the UR Administrator role from System Administrator [admin] role to prevent the System Administrator from viewing sensitive UR information. For more information, see Remove UR administrator role from system administrator.

After granting access, define the *sn_uni_req.min_admin_count* property in the system properties for UR to ensure that a minimum number of scoped administrators exist and the application is not locked out in one administrators absence.

Procedure
1. In the navigation panel, enter `sys_scoped_admin_acl_inheritance.list`.
2. In the **Application Administration ACL Inheritance** page, click **New**.
3. Select `Service Set` from the **Table** drop-down list.
4. Check that the **Application** is your scoped application
5. Click **Submit**.
   Creates an ACL inheritance record for the service set table in your scoped application.
6. In the **Application Administration ACL Inheritance** page, click **New** again.
7. Select `Service Configuration` from the **Table** drop-down list.
8. Check that the **Application** is your scoped application
9. Click **Submit**.
   Creates an ACL inheritance record for the service configuration table in your scoped application.

Remove UR administrator role from system administrator

After system configuration, remove the Universal Request (UR) administrator [sn_uni_req.ur_admin] role from IT System Administrator role (admin) to help prevent IT System Administrators from viewing sensitive information via forms, lists and UI.

Before you begin
Role required: admin with sn_uni_req.ur_admin

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About this task

By default, a System Administrator also has a UR admin role and can access the UR information. Add UR Admin role to specific users who would work on the UR configuration for their respective services. The user with this role can make another user a UR admin based on the roles and responsibilities. After this step is complete, to secure your application, remove the UR administrator role [sn_uni_req.ur_admin] from the System Administrator [admin] role. By doing so, you prevent the user with a default System Administrator [admin] role from viewing all the Universal Request information.

Note: Ensure that you have at least two users with the UR administrator role. If you assign only one person with the role and that person is deactivated, you no longer will have a user that can perform the UR admin duties.

Also, ensure that the same users have the System Administrator [admin] role to access the UR modules.

Procedure

1. Log in as admin.
2. From **User Administration**, go to **Roles** (left navigation menu).
3. Click **admin**.
4. On the **Contains Roles** tab, click **Edit**.

   Note: If you do not see the **Edit** button, change the **Application** scope to `Global`.

5. From the **Contains Roles List** column, highlight and move **sn_uni_req.ur_admin** to the **Collection** column.
6. Click **Save**.
7. Log out.

Create a business rule for your service

Create a business rule on the service table to attach the newly created department ticket with a universal request.

Before you begin

Role required: admin

About this task

You can create a business rule for your service for any of the following reasons.

- Provide a unified and simplified ticketing experience for your requester by configuring UR creation from all channels.
- Enable agents to transfer the primary ticket to other departments if the original request was initially sent to the wrong department by the requester.
- Facilitate cross-departmental reporting on the overall SLA if the ticket is transferred between departments.

Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Click **New**.
3. In the **Name** field, enter your business rule name.

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4. Select your service table from the **Table** list.
5. Select **Advanced**.
6. On the **When to run** tab, in the **When** condition select `after` and select the **insert** check box.
   This action specifies that the business rules should run after the insert or update.
7. On the **Advanced** tab, add your condition.
   For example, add the below condition in the **Condition** field.

```
!current.universal_request.nil() &&
current.universal_request.primary_task.nil()
```

8. Enter the script in the **Script** field that you want to run when the defined condition is true.
   For example, add the below script to attach the service ticket as a primary ticket for UR.

```
(function executeRule(current, previous /*null when async*/)
{ var urUtilsApi = new sn_uni_req.UniversalRequestUtils();
urUtilsApi.attachPrimaryTicket(current.universal_request,
current.getUniqueValue(),null,true); })(current, previous);
```

9. Click **Update**.
   For more information on other fields of this form, see Create a business rule.

Create a business rule to automatically create universal request

Create a before insert business rule on the service table to automatically create a universal request when a ticket is raised from any of the available channels.

Before you begin

Role required: admin

About this task

When a new request is submitted from the employee portal, this business rule validates if UR already exists. If there is no UR attached to the request, then the business rule automatically creates the UR and the department specific request is attached as the primary ticket.
UR is auto-created from any of the following channels:

- ServiceNow AI Platform
- Workspace
- Virtual Agent
- Email
- Interaction
- Self-service

You can automatically create a universal request in the following scenarios.

- To provide a consistent user experience while viewing the UR ticket.
- Transfer the department ticket seamlessly, as UR is already associated with the ticket.
- Use cross-departmental SLA or OLA reporting for UR, department ticket, and any other tasks associated with the parent UR.

Note: By default, this business rule is shipped with HR Service Delivery and IT Service Management. Activate it to use it. For other departments, to use this capability, create or customize the given business rule for your specific department table.

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Procedure

1. Navigate to **All** > **System Definition** > **Business Rules**.
2. Click **New**.
3. In the **Name** field, enter your business rule name.
4. Select your service table from the **Table** list.
5. Select **Advanced**.
6. On the **When to run** tab, in the **When** condition select `before` and select the **insert** check box.
   This action specifies that the business rules should run before the insert.
7. Enter the highest **Order** for the table.
   The order value is department specific.
8. Add your condition.
   For example, add the below condition in the **Condition** field.

   ```
   current.universal_request.nil()
   ```

9. Enter the script in the **Script** field that you want to run when the defined condition is true.
   For example, add the below script to attach the service ticket as a primary ticket for UR.

   ```
   (function executeRule(current, previous /*null when
   async*/) { /* call UR API to create or attach Universal
   Request with inserted department record */ new
   sn_uni_req.UniversalRequestFieldsMappingUtils().attachUniversalRequest(curr
   (current, previous);
   ```

10. Click **Submit**.
    For more information on other fields of this form, see Create a business rule.

Create extension points for departments

Create a scripted extension point to create your department specific primary ticket during cross-department ticket transfers. Using extension point enables you to create a primary ticket type as per the extension point definition.

Before you begin

Role required: admin

About this task

When configuring your department for Universal Request, to use transfer to other department capability, create scripted extension points and add them to the script includes of the application code. A sample *`CreateDepartmentTicket`* extension point is provided for you to modify and use.

> **Note:** For a better user experience, you can choose to use the Mapping configuration to define and configure fields that must be copied to the end-points for ticket transfers and creation. For more information, see Configure mappings.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_uni_req.CreateDepartmentTicket`.
3. On the form banner, click the link **here** to edit the record.

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4. Click **Create Implementation** in the related list to create your department specific extension point script.
   For more information, see Using extension points to extend application functionality.

Create an extension point for post-processing of transfers

Create a scripted extension point to perform additional actions after the cross-department transfer of a primary ticket in the Universal Request application. You can change the sample extension point to copy any additional information from the previous primary ticket's child entities.

Before you begin

Role required: admin

About this task

When a primary ticket of a Universal Request is transferred, the current mapping configuration only copies the information from the primary ticket to the destination ticket. However, if you want additional actions to be performed after the cross-department transfer of the primary ticket, you can create a scripted extension point implementation for the *DepartmentTransferPostProcessor* extension point. A sample *DepartmentTransferPostProcessor* extension point, which is based on your business requirements, is provided for you to modify and use.

Procedure

1. Navigate to **All >System Extension Points >Scripted Extension Points**.
2. In the search bar, search for *sn_uni_req.DepartmentTransferPostProcessor*.
3. Create your department-specific extension point by selecting **Create implementation**.
   For more information about using extension points, see Using extension points to extend application functionality.

Unified ticket experience setting

Set up your service to provide your employees with a unified and consistent ticket experience. This setup automatically creates a universal request when requests are raised from an interaction record, email, or record producer.

You can customise and configure to automatically create universal request for a task from various channels using APIs provided with the Universal Request application. For more information, see UniversalRequestUtilsSNC API.

Universal Request application supports the creation of universal request from an interaction record in the Agent Workspace. For more information, see Create a Universal Request from an Interaction Record.

Modifying email notification preferences helps in controlling the outbound email actions. For more information, see Email notification preferences for your service.

Set up email preferences to create universal request when an email is received in the configured mail box. For more information, see Automatically create universal request from an inbound email.

Configure your service record producer to create universal request from a request raised from the record producer. For more information, see Configure a catalog item or record producer to create a universal request.

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Create universal request automatically for department tickets via other channels

Universal request is not automatically created when a fulfiller or employee creates a department ticket from channels other than the Service Portal or Virtual Agent topics. Create universal request automatically by adding the business rule to the specific service table, such as an Incident or a HR service.

Before you begin

Role required: admin

About this task

Create universal request automatically by adding the business rule to the specific service table, such as an Incident or a HR service. The universal request created is then automatically associated to the department ticket, such as an Incident or a HR case created in that table. You may want to automatically create universal request in the following scenarios.

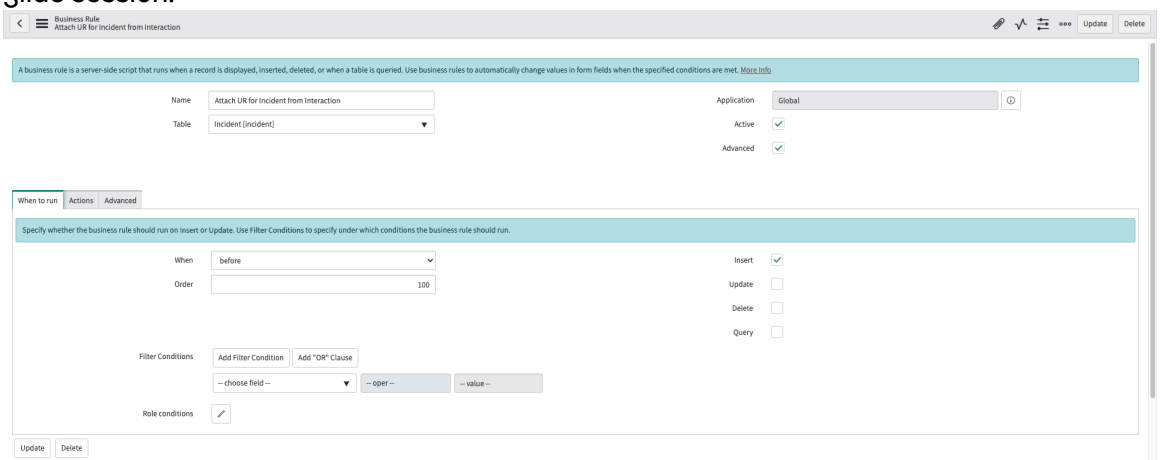
- To provide a consistent user experience when viewing the UR ticket.
- Transfer the department ticket at any time, as UR is already associated with the ticket.
- Use cross-departmental SLA/OLA reporting for the UR, the department ticket, and any other tasks associated with the parent UR.

You can achieve this by using a business rule and the Universal Request API. For more information, see UniversalRequestUtilsSNC API.

Follow the given steps to enable create universal request automatically from an interaction record.

Procedure

1. Modify the UI action of the department ticket to pass the URL parameter that is retrieved from the client script.
2. Create an AJAX script include to set the data in the glide session.
3. Create an onSubmit() client script to fetch the URL parameter.
   For more information, see Client scripts.
4. Set the URL parameter and the sys_id to the glide session using the AJAX script include.
5. Create a before insert business rule on the department ticket and retrieve the data from the glide session.



6. Create universal request record using the *`UniversalRequestUtils`* API and attach the universal request to the task.

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Email notification preferences for your service

Customize email notifications to control which email notifications are sent to requesters when a universal request is created. This setting prevents employees from receiving duplicate or inconsistent email notifications.

Before you begin

Role required: admin

About this task

Set up your notification preferences, so that the communications to the requester come from the Universal Request instead of the department ticket, and the links in the communications link back to the Universal Request instead of the department ticket.

Email notifications are usually sent when one of the following activities is performed:

- A universal request is created for a requester.
- Comments are added to the request.
- Resolution is provided for the request.
- Request is closed.

Procedure

1. Suppress outbound notification for services leveraging Universal Request.
2. Use effective number in email subject.

Suppress outbound notification for services leveraging Universal Request

You can configure outbound email notifications to define the emails a requester must receive when a universal request is created. For example, if your service (department) ticket is associated with a universal request, you can customize the notifications to send only the emails that are relevant to the requester.

Before you begin

Role required: admin

Note:

Service emails, such as, service ticket creation, notes or state changes, can be suppressed from being distributed.

Procedure

1. Navigate to **All** > **System Notification** > **Notifications**.
2. Open your service specific notification that you want to customize.
3. In the **When to send** tab, under the condition builder, add a new condition step as shown.

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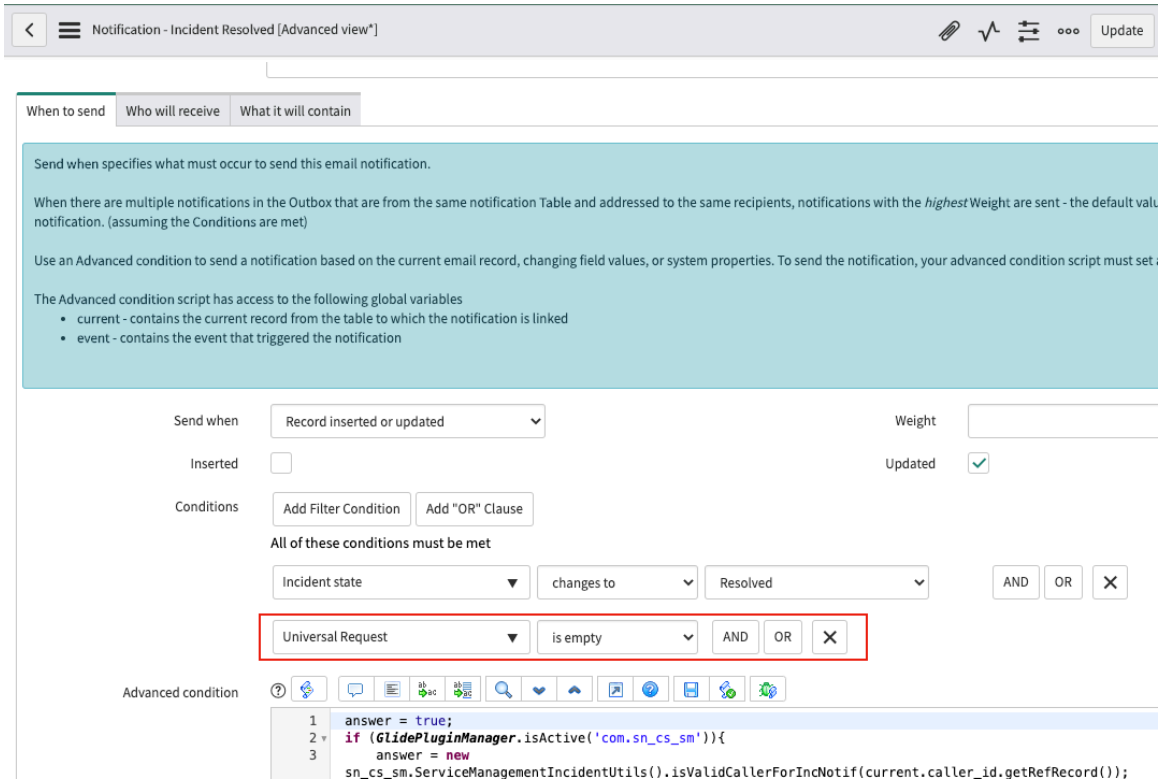

4. Click **Update**.

Use effective number in email subject

Modify the email subject to display the relevant ticket number by using the task effective number. For example, if your service ticket is associated with a universal request, then you must mask the service ticket number and show the UR number.

Before you begin

Role required: admin

About this task

The *task_effective_number* is a dynamic field value that displays the UR number when the service ticket is associated with UR and displays the actual service ticket number when there is no UR associated.

Procedure

1. Navigate to **All** > **System Notification** > **Notifications**.
2. Open your service specific notification that you want to customize.
3. In the **When it will contain** tab, in the **Subject** field use the *task_effective_number*. For example, in the Incident Opened and Unassigned notification, in the **Subject** field, enter *Incident ${task_effective_number} - open and unassigned*.

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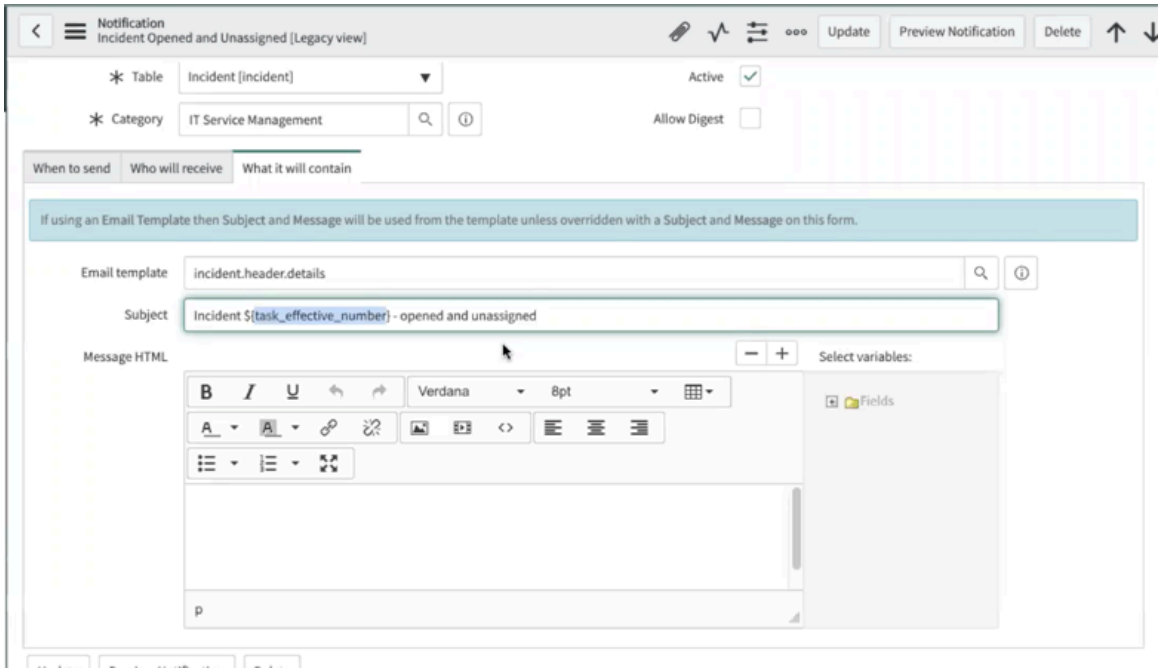

4. Click **Update**.

Automatically create universal request from an inbound email

Universal requests can be automatically created from the information received by emails. The auto-creation of universal requests enables faster response time and quicker resolution for employees compared to the agents manually creating requests from emails.

Configure the email IDs in the *General email address for Universal Requests* (sn_uni_req.ur_email) property. For more information, see Universal Request properties. By default, an email sent to these configured mail IDs will automatically create a universal request. Incoming emails marked with high importance will create universal requests with high priority (Priority 1).

By default, the solution definition is configured and the predictive model is auto-trained when the following conditions are met.

- The Universal Request (com.snc.universal_request) plugin is installed.
- The Predictive Intelligence (com.glide.platform_ml) plugin is installed.
- The Predictive Intelligence for Universal Request plugin (com.snc.universal_request.ml) plugin is installed. This plugin requires a separate subscription and must be activated by a ServiceNow personnel.

On instances where Predictive Intelligence for Universal Request is active, the following solution definition and business rule are available:

Solution definition table

Definition	Description
Universal Request Categorization	Predicts the assignment group from the short description and description of a Universal Request and also creates service level tickets that will be associated with the universal request.

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Business rule table

Business rule	Table	Description
Predict assignment group of UR	Universal Request [universal_request]	Predicts the assignment group from the short description and description of a Universal Request.

Configure a catalog item or record producer to create a universal request

Create a universal request along with a requested item or task-based record to provide unified ticketing experience.

Before you begin

Role required: admin

About this task

Only when the Universal Request plugin (com.snc.universal_request) is activated, the **Universal Request Config** section is added to a catalog item or record producer form.

A universal request is not created for the following scenarios:

- Cart with multiple catalog items is checked out
- Order guide is submitted

For information on creating a catalog item, see Create or edit a catalog item.

For information on creating a record producer, see Create a record producer.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Maintain Items**.
2. Select the required catalog item or record producer.
3. In the Catalog Item or Record Producer form, configure these fields in the **Universal Request Config** section.

Universal Request Config section fields

Field	Description
UR certified/ enabled item	Option to specify that a universal request should also be created along with a requested item or task-based record. In the universal request, a reference is created to the associated requested item or task-based record, which becomes the primary task of the universal request.
Requires Additional Review	Option to automatically select the **Needs resolution review** check box on the corresponding universal request. For information about the universal request fields, see Universal Request form. The **Requires Additional Review** field appears only when the **UR certified/ enabled item** check box is selected.

4. Click **Update**.

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Related topics

Service Catalog configuration for Universal Request

Universal Request state mapping

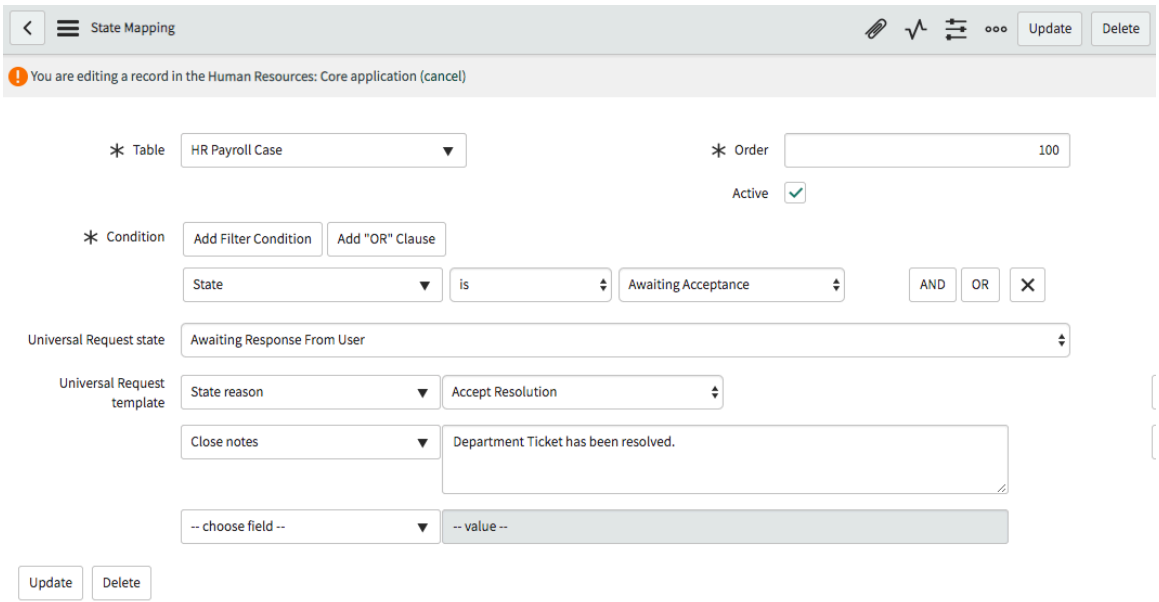
All workflows consist of states, transitions, and reasons. Map your service-specific states to the Universal Request states to provide a better user experience during request state transition.

Before you begin

Role required: admin

About this task

For example, consider a universal request that has an HR payroll case attached to it as a primary task. When the HR case state changes from **In-progress** to **Awaiting Acceptance**, then the universal request state is updated to **Awaiting Response From User**.



By mapping the states of the service to the UR state, it is ensured that the correct state of UR is displayed. The state transition of the primary ticket is hidden from the requester and they only see the simplified UR state transitions that are driven by the state mappings. The following table describes the universal request states and the suggested mappings.

UR states and suggested mappings

Primary ticket status	UR state
When UR is created and there is no primary ticket	New
All states when ticket is being worked upon, like WIP, awaiting approval	In progress
All states that require response from a requester	In progress

Procedure

1. Navigate to **All** > **Universal Request** > **Administration** > **State Mapping**.
2. Click **New**.

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3. On the form, fill in the fields.
   For more information on the field description, see State mapping form.

Domain separation and Universal Request

Domain separation is supported for ServiceNow Universal Request. Universal Request helps Help Desk agents to resolve cases across the enterprise for a better employee experience. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

How domain separation works in Universal Request

All configurations are strictly domain separated.

The Universal Request table is data-separated.

Tables

Configuration tables (strict domain separation)

- universal_request_service_set
- universal_request_service_conf
- universal_request_state_mapping
- universal_request_route_conf
- universal_request_transfer_mapping
- universal_request_transfer_fields_mapping

Data tables (data separated): universal_request.

Related topics

Domain separation for service providers

Using Universal Request

Use Universal Request to enable cross-departmental reporting from the time of an initial employee request through the final issue resolution. You can map various departmental ticket states and activity streams into a unified and simplified experience for your employees and agents.

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To learn more about Universal Request, see Exploring Universal Request.

Create Universal Request

Create a universal request record on behalf of the requester from the Universal Request application.

Before you begin

Role required: sn_uni_req.routing_agent or admin.

Procedure

1. Navigate to **All** > **Universal Request** > **Create New**.
2. On the form, fill in the fields.
   For more information on the field description, see Universal Request form.
3. Click **Submit**.

Cancel a universal request

Cancel the universal request if the issue is resolved or the request no longer needs any action.

Before you begin

Role required: admin, routing agents

About this task

You can cancel a universal request only if

- There are no active or closed primary tickets attached to it.
- The state of UR is either **New** or **In Progress**.

Procedure

1. Navigate to **All** > **Universal Request** > **Open**.
2. From the list of open universal requests, select the request you want to cancel.
3. Select **Canceled** from the **State** field.

   Note: If the user in **Opened for** tries to cancel the request, then they must enter the reason for canceling.

4. Click **Update**.

Result

When the UR is canceled, email notifications are sent to the stakeholders associated with the request.

Use the guided tour in Universal Request

Use the guided tour to navigate a sequence of interactive steps that provides an overview of Universal Request cases.

Before you begin

Role required: sn_uni_req.universal_request_write, sn_uni_req.routing_agent, sn_uni_req.sensitiveinfo_agent

When you select a Universal Request case for the first time, the guided tour starts automatically.

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Use this procedure the start the guided tour manually.

Procedure

1. Navigate to **All** > **HR Case Management** > **Agent Workspace for HR Case Management**.
2. Go to **Lists** > **Universal Request**.
3. Select a universal request in any given categories.
4. Select the **Show help** icon ().
5. Select **Take a tour**.
6. Select **Begin tour** in the Guided Tour pop-up window.
7. Read the call outs to understand the interface of a Universal Request case.
8. Select **Next** to progress through the tour.

   To end the tour at any point, select the **End Tour** option in the **Show help** menu option or select the **Close** icon in the pop-up window and confirm to end the tour.
9. Select **Done** to complete the tour.

View universal requests with primary ticket

A universal request can have multiple child requests, such as an IT ticket or an HR case. An active child request is called the primary ticket. At a given time, a universal request can have only one primary ticket.

Before you begin

Role required: admin, itil, or routing agents

To view the universal request with an active primary ticket, do the following.

Procedure

1. Navigate to **All** > **Universal Request** > **With Primary Ticket**.
   A list of all universal requests that have a primary ticket is displayed
2. Open and view the universal request you want to work on.

Create associated ticket for primary ticket of UR

Agent, working on the primary ticket, requests other departments for assistance in resolving a universal request (UR) by creating associated tickets for the UR. Multiple departments can work simultaneously on these associated tickets. These associated tickets are independent of the UR state flow.

Before you begin

Configure the *sn_uni_req.associated_ticket* property in the **Universal Request properties** page to determine how to handle the creation of the associated tickets. For more information, see Universal Request properties.

Role required: agent part of the assignment group of the primary ticket or assigned to agent

About this task

A routing agent of the primary ticket can request other departments for assistance in resolving a UR by creating associated tickets on the primary ticket. Multiple departments can work simultaneously on the associated tickets to resolve the UR.

The following are some key highlights.

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- Pass on the context of the request directly to the other department using the pop-up when creating an associated ticket.
- Configure the information to be copied from UR to the Associated ticket in Mappings configuration.
- Agents work on the associated ticket even after the closure of primary ticket / UR as associated tickets are independent of the UR state flow.
- Configure the Associated ticket tab configuration to view and track the activity of associated tickets from the standard ticket page.

Procedure

1. Navigate to the primary ticket record.
   For example, to open an incident primary ticket, navigate to **All** > **Universal Request** > **With Primary Ticket**.
2. Open the UR and then click the associated primary ticket.
   For example, the Incident ticket associated is displayed as a link in the message.
   The primary ticket record appears on the page.
3. Click **Create Associated Ticket**.
4. In the **Create Associated Ticket** dialog box, enter the following details.

   Note: Based on the sn_uni_req.associated_ticket property, different fields display on the form. For more information, see Universal Request properties.

   - **Department**: Select the department from the list.
   - **Service**: Select the specific service of the chosen department.
   - **Short description**: Enter the short description for the new associated ticket.
   - **Description**: Enter the detailed description for the new associated ticket.
   - **Work notes**: Enter work notes details.
5. Click **Create**.
   An associated ticket is created with the descriptions provided and is associated to the existing UR of the primary ticket.

Improve inter-departmental communication

Enable agents to effectively collaborate on associated tickets using the Sidebar discussion and Discuss options.

Before you begin

Role required: sn_uni_req.routing_agent or admin

Procedure

1. Navigate to **All** > **Universal Requests**.
2. Select the universal ticket that is assigned to you.
3. Select **Discuss**.
4. In the Start a sidebar discussion window, fill in the fields:

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Field	Description
Record number	Unique number generated for the universal request.
Subject	Option to indicate the main topic or point of discussion.
Add participants	Routing agents with whom you want to initiate the discussion. This restricted list controls agent participation and applies access permissions consistently across associated tickets.
Include a brief message for participants	Brief message to the participants indicating what the discussion is about.
Private discussion	Option to create a private discussion accessible only to chosen participants. Users linked through associated tickets, even those with access to the Universal Request record, will not be included unless explicitly added to the **Add Participants** list.

5. Initiate your discussion with the selected routing agents by selecting **Start discussion**. The **Start private discussion** button appears only when you select the **Private discussion** option.

What to do next

1. Select Sidebar discussions .
2. Review all the discussions that you are part of.
3. To begin another conversation with routing agents, select **New Discussion**.

Universal Request sensitive information security

Universal Request security capability provides flexibility to protect information by controlling the view and edit authorization.

Key advantages

- Requester can mark the request as sensitive at the time of creating the request.
- Routing agents can mark the request as restricted while creating a request.
- If the request is not sensitive, a sensitive info routing agent from the current assignment group, or the primary ticket agent can mark the ticket as unrestricted while triaging.
- When a restricted ticket is created or transferred, only a sensitive info routing agent from the current assignment group, or the primary ticket agent can view the complete details of the ticket.
- The security controls are also transferred during cross-department transfers, as the assignment group is changed to that of the new department.
- Use Predictive Intelligence solution to automatically identify and mark the universal request as sensitive.

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Sensitive Info Agent role

The *sn_uni_req.sensitiveinfo_agent* role controls who views and acts on the universal requests that have sensitive information. Only the UR routing agents from the current assignment group with the *sn_uni_req.sensitiveinfo_agent* role, and the primary ticket agent can view the complete details of the ticket.

For example, if an HR case (primary ticket) is created for a universal request, then only the HR routing agent with the *sn_uni_req.sensitiveinfo_agent* role, or the HR case agent can view the complete details of the request, such as the short description, description, attachments, and comments.

An agent without the sensitive agent role can access only the primary information of the request. The secured fields (short description, description), attachments, and comments in the activity stream are hidden.

Application Administration enabled scoped application

Universal Request is an Application administration enabled application. If you are configuring your service that is also an application administration enabled application or has it's own security modal, then you must register your application. For more information, see Register application administration enabled scoped application. This ensures that the security is maintained within the universal request.

Raising a sensitive universal request from the portal

When requesters create a request using the **Request Help** option on the Service Portal, Employee Center, or Mobile app, then they can secure the information provided as sensitive.

To help requesters identify sensitive information, a knowledge article is provided on the **Request Help** page. After determining if the request is sensitive, they can select the **Issue contains sensitive or confidential information** check box. If the check box is selected, the requester can select the department to which the issue might belong, or choose the **I'm not sure (general submission)**.

If the Predictive Intelligence for Universal Request [com.snc.universal_request.ml] plugin is installed, then the department is auto-selected, and the requester is notified about the selection. For more information, see Activate Predictive Intelligence for Universal Request. The requester can then choose to override the suggestion. On submission, this action creates a universal request marked as **Restricted**.

At times, agents can also create a request from an interaction, a call, or from the Self-Service module. In such cases, the agent can mark the request as **Restricted**.

Agent experience of UR security

Any agent can view the list of universal requests that are marked as restricted. However, only the service-specific assignment group agent or the agent who have access to sensitive requests can view the detailed information. While triaging, any agent who views the request and identifies that it has sensitive information can mark it as restricted.

If the Predictive Intelligence for Universal Request [com.snc.universal_request.ml] plugin is installed, then UR with sensitive information is automatically identified and marked as restricted and only agents with *sn_uni_req.sensitiveinfo_agent* role can access and work on the request.

However, only the service-specific assignment group agent or the agent with the role to access a sensitive request can mark it as unrestricted. For more information, see Restrict universal

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request access or Mark universal request as unrestricted. You can mark a request as restricted or unrestricted directly on the universal request or from the primary ticket.

Transferring a restricted request

A restricted request means the parent universal request is marked as restricted. When a primary ticket of the sensitive universal request is transferred to another department, the security controls are also transferred, as the assignment group of the UR changes.

COE Security

COE security policies are a way to easily restrict access to different COEs via configuration. The underlying COE security policy implementations are ServiceNow ACLs.

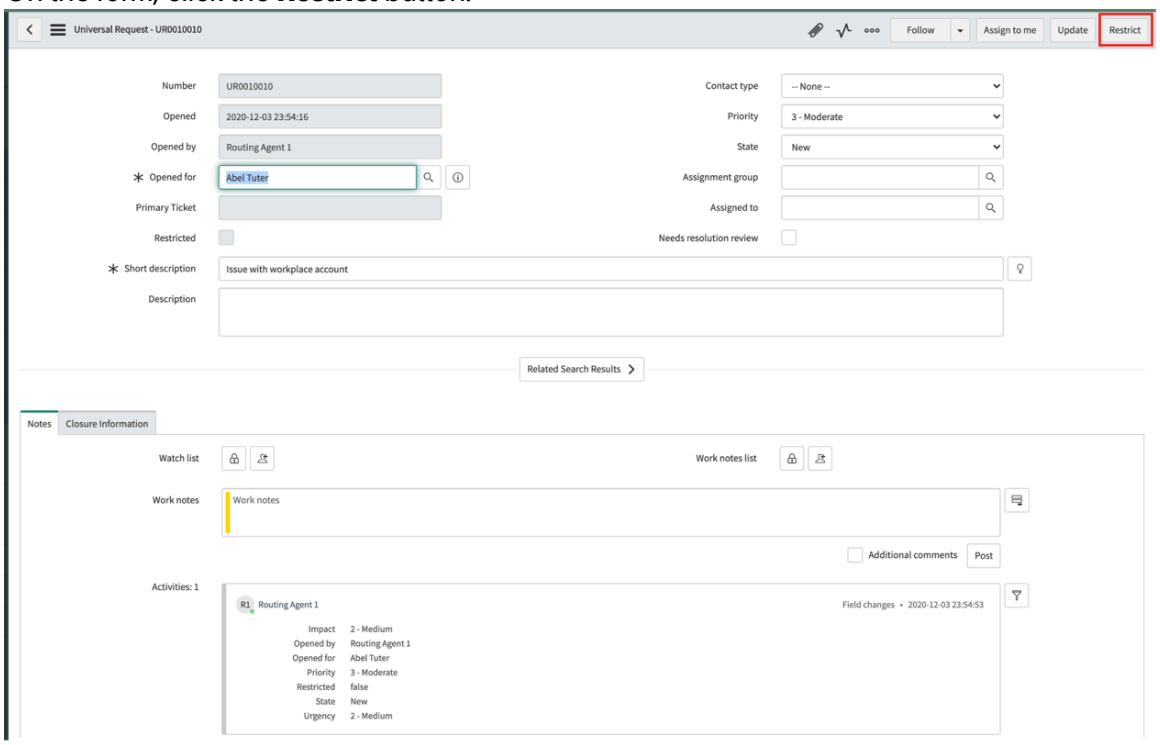
Restrict universal request access

Mark a universal request as restricted when you identify the request contains sensitive information.

Before you begin
Role required: employees, routing agents, sn_uni_req.sensitiveinfo_agent or service specific assignment group members

Procedure

1. Navigate to the universal request that you want to mark as restricted.
2. On the form, click the **Restrict** button.



The restricted fields are hidden, and the form is only for view purpose.

Note: To mark the request as unrestricted only agents with the access role can modify.

Mark universal request as unrestricted

You can unrestrict a restricted universal request if you identify that the request does not have any sensitive information.

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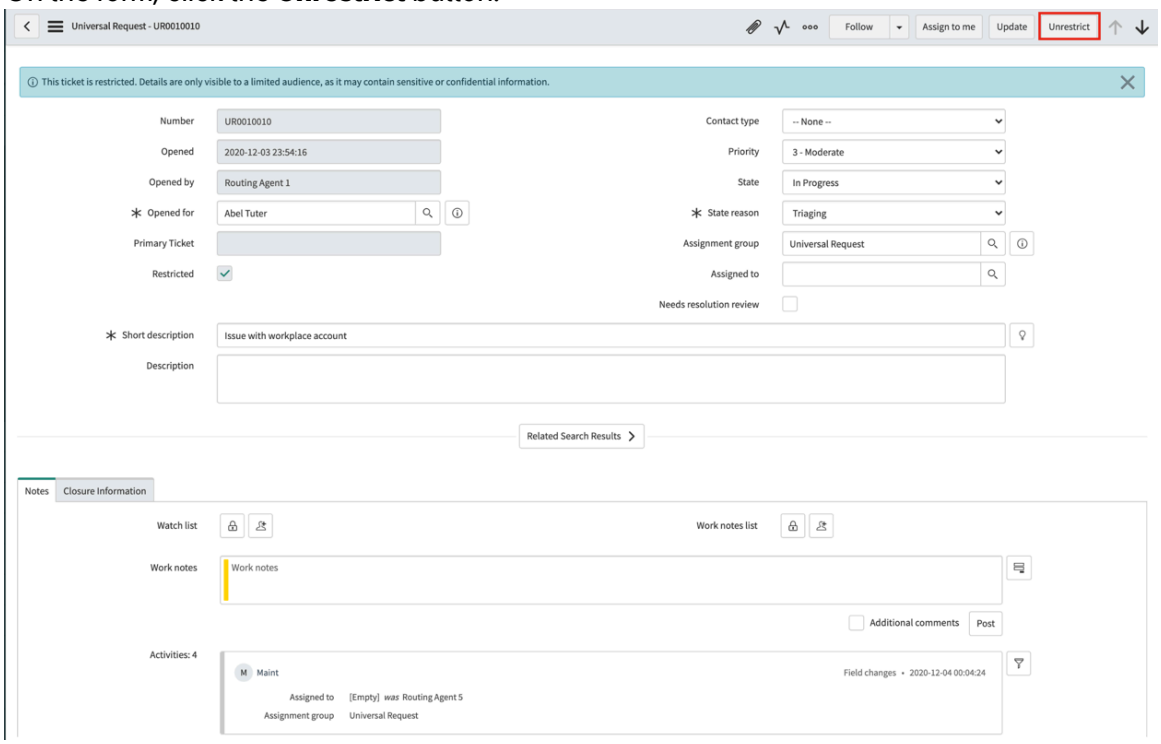
Before you begin

Role required: sn_uni_req.sensitiveinfo_agent, Primary ticket agent, or members of assignment group of that UR

Procedure

1. Navigate to the universal request that you want to mark as unrestricted or to the primary ticket that you are resolving.
2. On the form, click the **Unrestrict** button.



The hidden restricted fields are now visible, and any agent can view the content.

Note: To mark the request as unrestricted only agents agent who is part of the primary ticket assignment group or with the access role can modify.

Transfer a primary ticket

You can transfer a primary ticket back to Universal Request, service set (department), or service either with or without resolution.

Before you begin

Role required: agent part of the assignment group of the primary ticket or assigned to the agent

About this task

Configure the *sn_uni_req.transfer_type* property in the **Universal Request properties** page to determine how to handle the primary ticket transfers. For more information, see Universal Request properties.

A routing agent can either resolve and close a primary ticket or transfer it to back to Universal Request or another department for review and closure. When a primary ticket is transferred back to UR, the ticket is no longer a primary ticket, and the primary ticket field of the Universal Request becomes empty.

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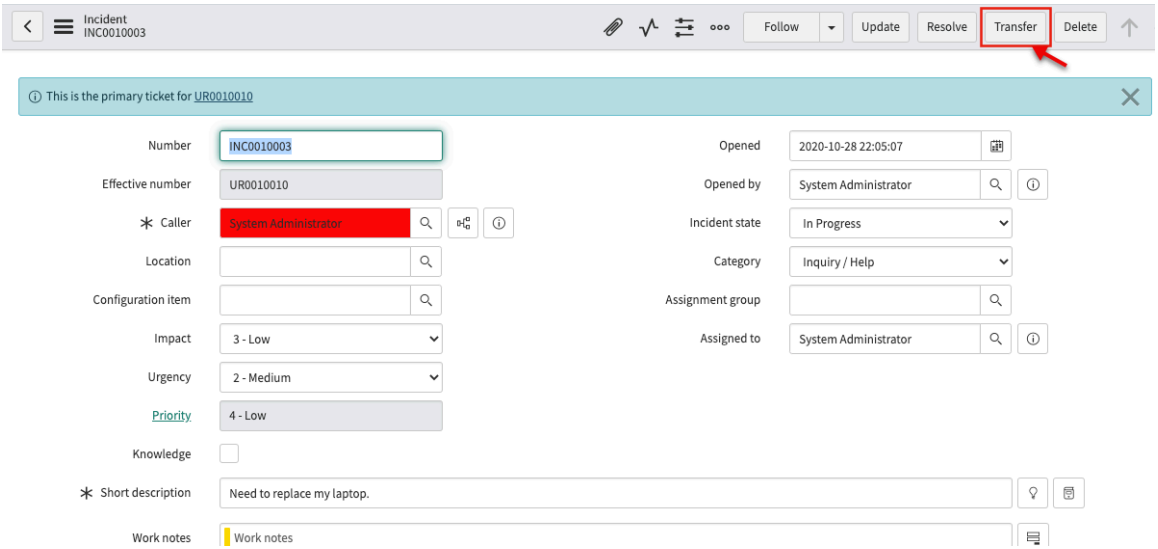


When transferring the ticket, the routing agent can choose the department and a specific service within the department or can select `I'm not sure` when they're unsure of the correct department or service.

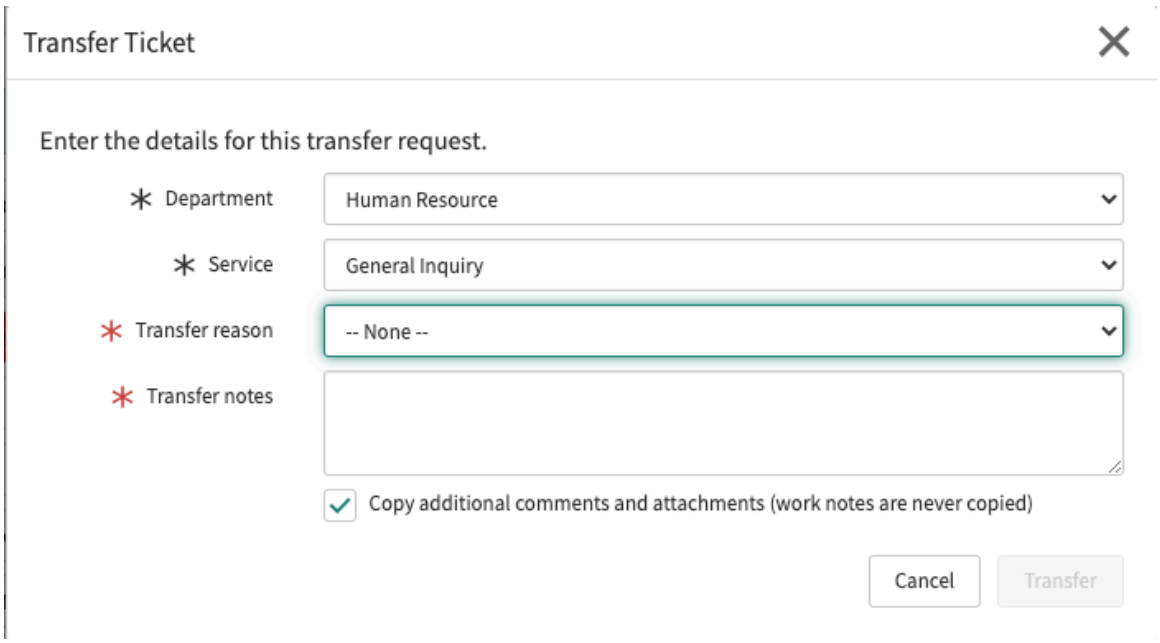
The agent can transfer a ticket with one of the following reasons:

Transfer with resolution

The request is resolved and transferred back to UR, a specific department, or a service. Agents can select this option when another departments help is required to fulfill the request.

Transfer without resolution

The request isn't resolved or doesn't belong to the specific department and transferred back to UR, a specific department, or a service.



Procedure

1. Navigate to the primary ticket record that you want to transfer.
   For example, to open an incident primary ticket, navigate to **All** > **Universal Request** > **With Primary Ticket**.

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2. Open the universal request and then click the associated primary ticket.
   For example, the Incident ticket associated is displayed as a link in the message.
   The primary ticket record appears on the page.
3. Verify and click **Transfer**.
4. In the **Transfer Ticket** dialog, provide the following details and then click **Transfer**.

   Note: Based on the transfer type configuration, different fields display on the form. For more information, see Universal Request properties.

   - **Action**: Select if you want to transfer the ticket to another department or back to the Universal Request.
   - **Department**: Select the department from the list.
   - **Service**: Select the specific service of the chosen department.
   - **Transfer reason**: Select the reason from the list.
   - **Transfer notes**: A brief description for routing the primary ticket to the UR Routing agent.
   - **Copy additional comments and attachments**: Clear the check box if you don't want to transfer the ticket with additional comments and attachments. By default, all attachments and comments are transferred.

     Note: Work notes aren't copied while transferring.

Result

The ticket is transferred based on the direct transfer mappings in mapping configuration and transfer type configurations. For more information on configuring routing, see Transfer configuration and Map UR fields with target table fields.

Search similar and closed Universal Requests

When creating a Universal Request, search for closed universal requests that are similar using Predictive Intelligence.

Before you begin

Role required: admin

Note: This search option is available only if you install the Predictive Intelligence plugin (com.glide.platform_ml) plugin and then enable the **Enable related search for similar closed Universal Requests** (sn_uni_req.similar_closed_universal_request) property. For more information on this property, see Universal Request properties.

Procedure

1. Navigate to **All** > **Universal Request**.
2. Create new or open an existing request that is not closed.
3. Select `Similar Closed Universal Request` under the **Related Search Results** section.
   All closed universal requests that are similar are displayed based on the short description, description, and assignment group of the selected universal request.

What to do next

Review the solutions to copy the closed information or mark the solution as **This helped**.

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Translate a Universal Request field

Use dynamic translation to translate Universal Request fields to another language.

Before you begin
Role required: admin

About this task
As of now, you can only translate the short description, description and work notes fields on a Universal Request form.

Procedure

1. Navigate to **All** > **Settings** > **General** > **Language**.
2. Select the language.

   Note: Only the languages that have been configured will be displayed. To activate a language, see Activate a Language
3. Navigate to **Universal Requests** > **All**.
4. Open the request to be worked on.

   A translate icon appears next to the fields. The logged-in user can click on to translate the text to their preferred language as configured.



Reporting solutions for Universal Request

Universal Request (UR) reporting solutions contain preconfigured dashboards with actionable data visualizations to improve your employee service delivery processes.

Use the widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. To view the Universal Request reports and dashboard, install the Universal Request Reporting plugin (com.snc.universal_request.reporting) .

Note: The Universal Request Reporting plugin (com.snc.universal_request.reporting) is part of the Universal Request Professional subscription. For more information, see Activate Universal Request Reporting.

Depending on your role, you can use any of the following dashboards for your day-to-day operations.

- **Overview dashboard**: As routing agents, view the details of the assigned universal requests and trends.
- **Process Overview dashboard**: As Process owners, analyze the behaviors of the tickets in your organization.

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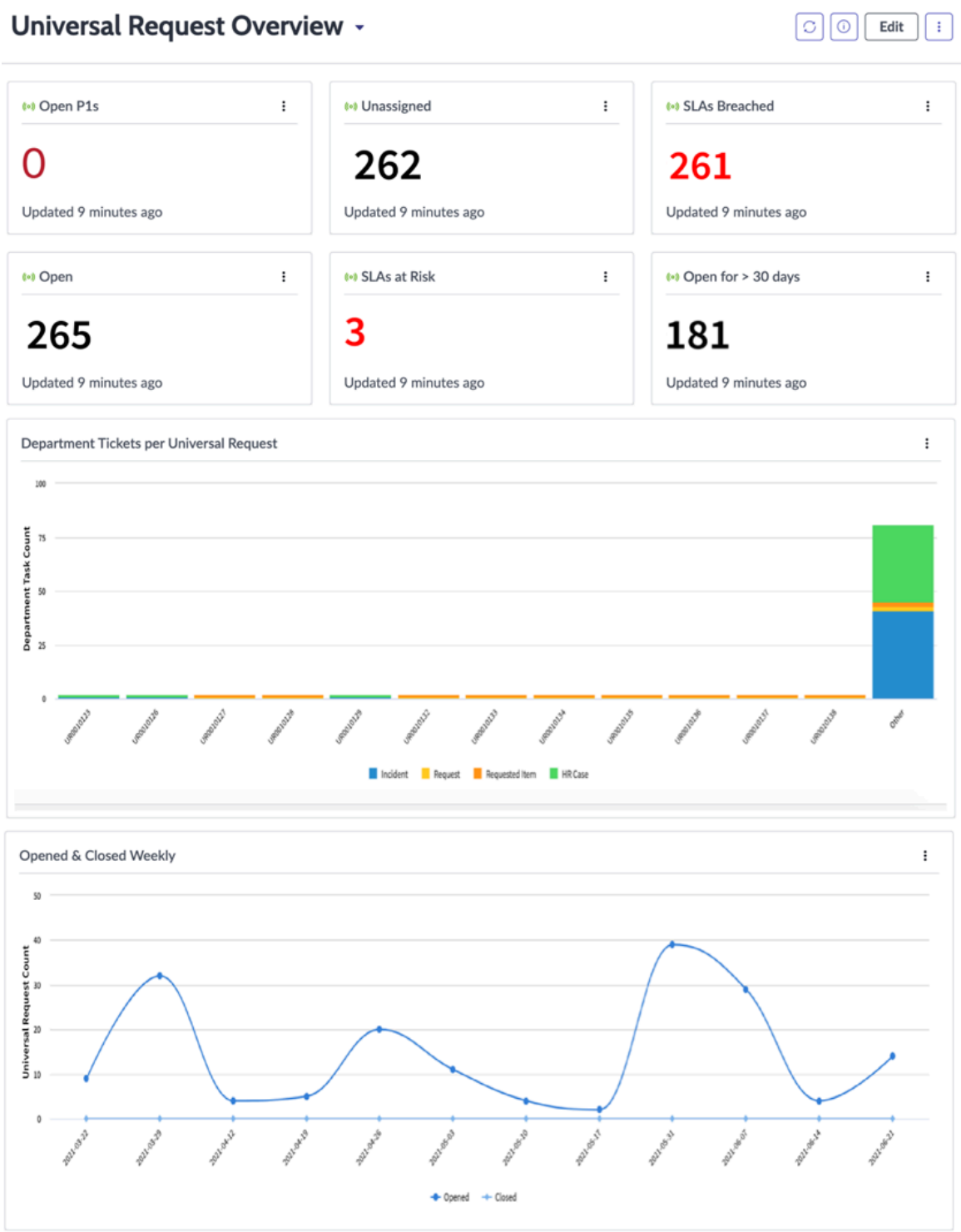
Universal Request Overview dashboard

View and analyze the general statistics of the universal requests for routing agents, such as the number of open requests, breached, unassigned, and requests at risk. You can also view the weekly opening and closing universal requests along with the number of department tasks that are part of each UR.

To view the Universal Request Overview dashboard, navigate to **Universal Request** > **Overview**. You can view the dashboard in the Next Experience UI Framework.

Overview of universal requests



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Select any indicator widget to view it's details in a list view.

Use the **Edit** button to modify the dashboard and the widgets with the in-line editor. For more information, see Edit Platform Analytics dashboards.

Required ServiceNow AI Platform roles

The following roles can view the Universal Request overview dashboard:

- Admin
- UR Admin [sn_uni_req.ur_admin]
- Service owner [sn_uni_req.ur_service_owner]

Users and roles

Users and roles in Universal Request

Users and goal	Required role
Routing agent: View the dashboard.	sn_uni_req.routing_agent
UR admin: View and edit the dashboard and manage users, groups, and roles of the dashboard	admin, sn_uni_req.ur_admin
UR service owner: View and analyze the UR behaviors and track transfers to make informed decisions.	sn_uni_req.ur_service_owner

Reports

Reports in Universal Request

Title	Type	Source table	Description
Open P1s	Single Score	Universal Request [universal_request]	Count of all open P1 requests.
Unassigned	Single Score	Universal Request [universal_request]	Count of all requests that are open and not assigned to any UR agents.
SLAs Breached	Single Score	Universal Request [universal_request]	Count of all requests that breached the resolution SLA.
Open	Single Score	Universal Request [universal_request]	Count of all requests that are open.
SLAs at Risk	Single Score	Universal Request [universal_request]	Count of all requests that crossed 75 percent of the business elapsed time.
Open for >30 days	Single Score	Universal Request [universal_request]	Request that are open for more than 30 days.

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Reports in Universal Request (continued)

Title	Type	Source table	Description
Department Tickets per Universal Request	Bar	Task [task]	This report shows all the universal requests that were created in the last 3 months along with the associated department tickets. You can view the type of department ticket created by hovering over the bars. Also, you can view the list of all the department ticket clicking on the bars.
Opened & Closed Weekly	Spline	Universal Request [universal_request]	This report shows the universal request that were opened and closed over the last 3 months, aggregated weekly.

Universal Request Process Overview dashboard

Analyze the behavior of universal requests in your organization and track transfers. As a process owner, use this dashboard to measure efficiency and to determine necessary improvements in the overall implementation of Universal Request.

To view the Universal Request Process Overview dashboard, navigate to **Universal Request** > **Process Overview**. The reports are based on closed universal requests. You can select the time period for the reports using the date filter. Click and open each indicator for more details.

You can view the dashboard in the Next Experience UI Framework. Select any indicator widget to view it's details in a list view.

Use the **Edit** button to modify the dashboard and the widgets with the in-line editor. For more information, see Edit Platform Analytics dashboards.

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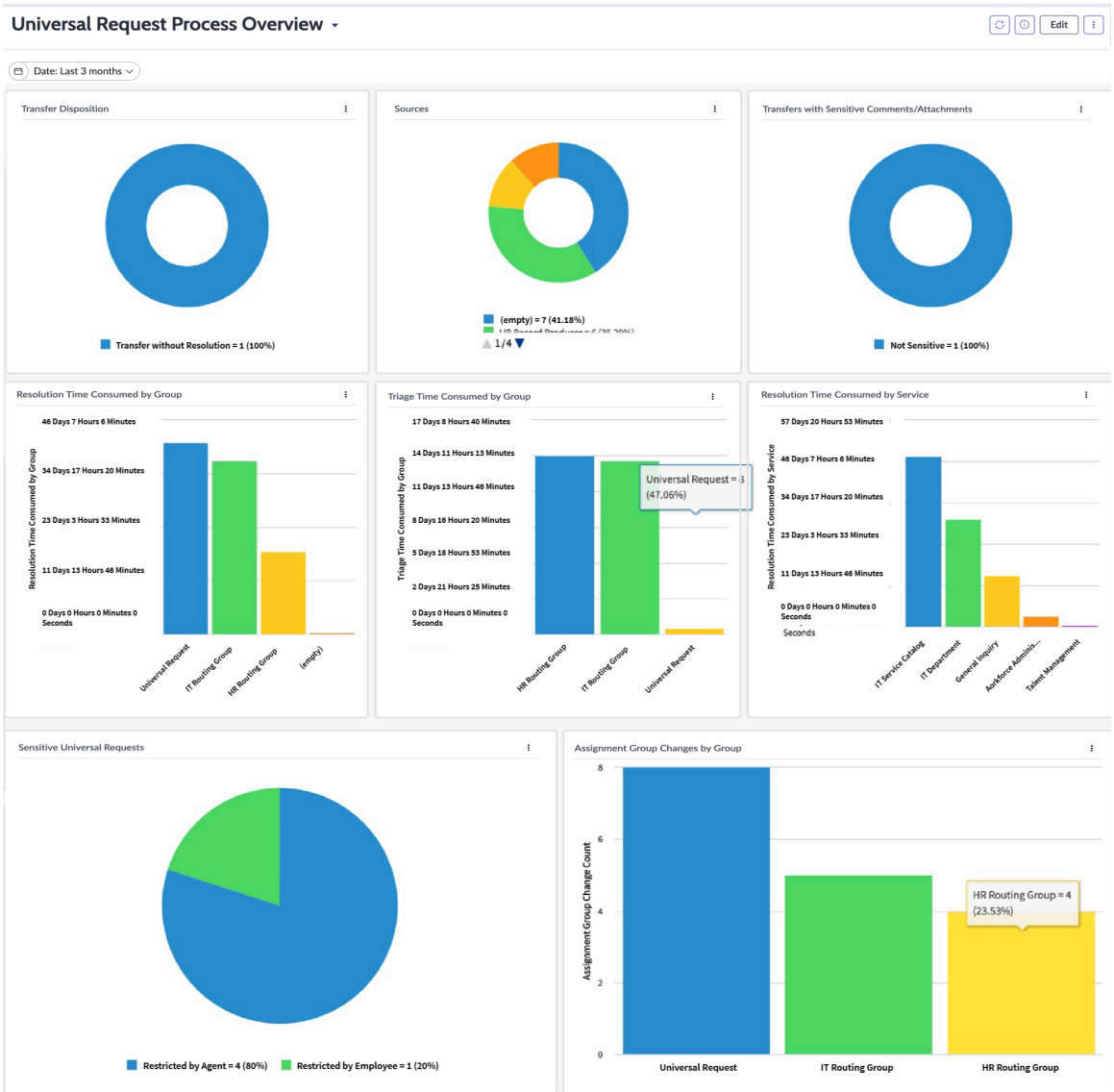
Process Overview tab



The **SLA Trends** tab displays dynamic Performance Analytics reports for Universal Request. To view this tab, activate the Performance Analytics and Reporting for Universal Request plugin (com.snc.universal_request.pa). The **SLA trends** tab displays reports based on closed universal requests. By default, the monthly data is displayed. To collect daily data for this tab, run the *[PA Universal Request] Daily Data Collection* job. To collect data for the past three months, run the *[PA Universal Request] Historical Data Collection* job.

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Process Overview SLA Trends tab



Required ServiceNow AI Platform roles

The following roles can view the Universal Request Process overview dashboard:

- Admin
- UR Admin [sn_uni_req.ur_admin]
- Service owner [sn_uni_req.ur_service_owner]

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Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Users and use cases for Universal Request Process Overview dashboard

User	Dashboard use
admin, sn_uni_req.ur_admin	View and edit the dashboard. Manage users, groups, and roles of the dashboard.
sn_uni_req.ur_service_owner	View and analyze the UR behaviors and track transfers to make informed decisions about your service.

Indicators

All the following indicators are measured on a monthly basis.

Universal Request Response SLA Breaches

The number of breaches in Universal Request Response SLA.

Universal Request Response SLA Average

The average value for Business elapsed time (in minutes) of response SLAs for Universal Request.

Universal Request Resolution SLA Average

The average value for Business elapsed time (in minutes) of resolution SLAs for Universal Request.

Universal Request Resolution OLA Breaches

The number of breaches in Universal Request Resolution OLA.

Universal Request with Primary Ticket Resolution SLA Average

The average value for Business elapsed time (in minutes) of resolution SLAs for Universal Requests with a primary ticket.

Universal Request Primary Ticket Transfer Without Resolution

The number of Universal Request primary tickets that are transferred without resolution.

Universal Request Primary Ticket SLA Breaches

The number of SLA breaches in primary tickets which have an associated universal request.

% of breached Resolution SLAs of Universal Request with primary ticket

The result of the formula `([[Universal Request with primary ticket Resolution SLA Breaches]] / [[Universal Request with primary ticket Resolution SLA]]) * 100`.

The following indicators are used only to calculate formulas and are not shown directly on the dashboard:

- Universal Request with primary ticket Resolution SLA Breaches
- Universal Request with primary ticket Resolution SLA

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Breakdowns

The breakdowns in the Universal Request Process Overview dashboard are as follows:

- UR Service Configurations
- UR Assignment groups
- Universal Request (Inactive)

Data visualizations

The visualizations in the **SLA trends** tab are based on closed universal requests per month.

Universal Request Process Overview dashboard reports

Title	Type	Source table	Description
Assignment Group Changes by Group	Bar	universal_request_instrumentation	The number of times the UR is moved between the UR assignment group.
Resolution Time Consumed by Group	Bar	sla_breakdown_by_primary_ticket_and_group	The total resolution time consumed by universal requests spread across different assignment groups, such as IT, UR, or HR routing group. Resolution time is the total time consumed by the UR from the creation to closure.
Sources	Donut	universal_request_instrumentation	The percentage of universal requests created from various sources, such as interaction, UR record producers, virtual agent, or email interactions.
Resolution Time Consumed by Service	Bar	sn_uni_req_sla_breakdown_by_primary_task_service	The total resolution time consumed by each department on the primary ticket. Resolution time is the total time consumed by the primary ticket from its creation to closure.
Triage Time Consumed by Group	Bar	sla_breakdown_by_primary_ticket_and_group	The total triage time consumed by different assignment groups on the UR. Triage time is the time consumed by the ticket in the UR assignment group queue before the department ticket is created. The triage time pauses when the department ticket is created.
Transfer Disposition	Donut	universal_request_instrumentation	The disposition selected by the routing agents while transferring the tickets back to the UR. The statuses captured are the percentages of tickets that are either of the following:

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Universal Request Process Overview dashboard reports (continued)

Title	Type	Source table	Description
			• Transferred with resolution • Transferred without resolution
Sensitive Universal Requests	Pie	universal_request_instrumentation	The number of tickets restricted by the employees and agents.
Transfers with Sensitive Comments/ Attachments	Donut	universal_request_instrumentation	The percentage of universal requests that were transferred with sensitive information.

Filter

The date filter is available for the **Overview** tab.

Universal Request Process Overview dashboard filters

Name	Type	Description
Date	Choice	The time period for the data that will be filtered.

Virtual Agent for Universal Request

The Virtual Agent capabilities of Universal Request provide automated chat options to employees. It reduces the workload of agents by assisting the requester with certain basic tasks. It can display suggestions for self-help topics and knowledge articles based on keywords. It can also help employees to update their universal requests.

The Virtual Agent capabilities of Universal Request can help your employees do the following:

- Create a universal request.
- Mark a universal request as sensitive while creating it.
- Track universal requests opened for them.
- Add comments to universal requests opened for them.
- Update the watchlist for universal requests opened for them.
- Close universal requests opened for them.

Virtual Agent uses predefined topic conversations to interact with employees. The information exchanged during the conversation flow, such as user inputs and virtual agent responses, enables the virtual agent to fulfill a request or help complete a task. The conversation topics available by default with Universal Request are as follows:

- The Employee Help Request topic enables employees to create universal requests using the Virtual Agent. When a request contain sensitive information, the Virtual Agent marks the request as sensitive after confirming with the employee. If your organization uses the ServiceNow® Predictive Intelligence solution, you can train the solution to detect sensitive information on its own. Predictive Intelligence can also predict the correct department for the primary ticket of the universal request. Using Predictive Intelligence, the employee can now create a ticket and assign it to the correct department.

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- The Track Universal Request Status topic enables users to track and update the universal requests opened for them. Employees can add comments or update the watchlist of their request. They can also close a ticket after providing a reason. The topic has an integrated NLU model, enabling requesters to enter their queries in natural language utterances. Some of the utterances include the following queries:
  - Track my request
  - Track my ticket
  - What is the status of my request
  - Need an update on my ticket

These topic conversations are available in all supported Universal Request Virtual Agent messaging integrations.

Create a universal request using Virtual Agent

Create a universal request with the help of Virtual Agent. You can access the Virtual Agent using the chat option in the search page of Service Portal.

Before you begin

Role required: none

Procedure

1. On the portal home page, search for your query in the search bar.
2. In the Contact us for help section, select **Chat**.
3. Describe your request.
4. Select whether your request contains sensitive information.
   If your request contains sensitive information, the Virtual Agent can detect that. It can mark your request as sensitive. For a sample Virtual Agent conversation, see Universal Request Virtual Agent conversation flows.
5. If prompted, select the department.

Result

A universal request is created for your issue.

Update or cancel a universal request using Virtual Agent

Update or cancel a universal request with the help of the Virtual Agent in the chat option.

Before you begin

Role required: none

Procedure

1. On the portal home page, open the chat window ( ).
   The Virtual Agent prompts you to enter your request.
2. Enter your request to track, update, or cancel your request.
   If you are not sure about the option to select, enter `Track my request`.
3. Select **Track universal Request Status (Template)**
4. Select the request that you want to update.

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5. Select the appropriate responses to complete your request.
   For a sample Virtual Agent conversation, see Universal Request Virtual Agent conversation flows.

Universal Request Virtual Agent conversation flows

Universal Request Virtual Agent includes several predefined topic conversations that you can use to resolve common tasks on your universal requests.

The Universal Request Virtual Agent contains the following predefined conversation flows:

Create a universal request

If employees cannot find the required assistance in the form of self-help topics, they can create a universal request using the Virtual Agent in the chat option on the search page. They can also assign the request to the correct department. If the request contains sensitive information, they can mark the request as sensitive while creating it.

UR with sensitive information

UR without sensitive information

Add comments to your universal request

Employees can add comments to universal requests opened for them. If employees track their universal requests, the comments are also displayed in the chat along with other details.

Adding comments in UR

Update watchlist

Employees can add people to the watchlist in universal requests opened for them.

Add people to watchlist

Close a universal request

Employees can close a universal request opened for them.

Closing UR

Universal Request reference

Reference topics provide additional information about the universal requests, including lists and forms.

Universal Request properties

Administrators can use Universal Request properties to determine and configure the application behavior.

Navigate to **Universal Request** > **Administration** > **Properties** to view and edit the properties.

Universal Request properties

Property	Property name	Description
Copy Universal Request		

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Universal Request properties (continued)

Property	Property name	Description
Enable copy universal request feature	sn_uni_req.com.snc.universal_request.copy.enable	Copies the details of an existing Universal Request to a new record.
Copy attachments from originating universal request	sn_uni_req.com.snc.universal_request.copy.attachment	Copies any attachment of an UR record to a target record.
List of attributes (comma-separated) that will be copied from the originating universal request	sn_uni_req.com.snc.universal_request.copy.attributes	List of attributes that will be copied from the originating Universal Request record.
Transfer type		
Select the transfer type to determine how the primary ticket is handled	sn_uni_req.transfer_type	Determines how the primary ticket is handled based on the selection. • **Universal_request:** If this transfer type is selected, then the primary ticket is transferred back to UR and UR assignment group is changed based on the **Service** selected during transfer. The primary ticket is handled based on the transfer reason and no new primary ticket is created. • **Department only:** If your organization has a department level routing agent group to handle requests, then select this transfer type. When this transfer type is selected, UR is directly transferred to the department level routing group, and a general inquiry primary ticket is created. • **Department:** If this transfer type is selected, then based on the **Transfer Action** and **Service** selected, the UR is transferred back to the service level or department assignment group. The primary ticket is handled based on the transfer reason.

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Universal Request properties (continued)

Property	Property name	Description
		Note: If the **Service** is disabled, then a general primary task is created for the selected department. • **Service:** If this transfer type is selected, then based on the **Action** and **Service** selected, the UR is transferred back to the service level or department assignment group. The primary ticket is handled based on the transfer reason. For `Transfer to department` transfer action: ○ If no service is selected, a general inquiry primary ticket is created for the selected department. ○ If a specific service is selected, a primary ticket is created for the selected service.
Associated Ticket		
Select the type to determine how the associated ticket creation is handled	sn_uni_req.associated_ticket	Determines how the associated ticket is handled based on the selection. • **Department only:** If your organization has department level service set configurations of Universal Request, then select this type. When this mode of associated ticket creation is selected, primary ticket agents are able to create associated tickets for the departments configured with UR. • **Service:** When this mode of associated ticket creation is selected, primary ticket agents are able to create associated tickets for the

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Universal Request properties (continued)

Property	Property name	Description
		services or departments configured with UR. • **False**: This disables the associated ticket creation functionality.
Portal		
Portal suffix to which the UR link is redirected.	sn_uni_req.universal_request_portal	The default portal to which all the UR links are redirected.
Predictive Intelligence		
Enable universal request auto categorization	sn_uni_req.auto_categorization	Enables the application to use the Universal Request Categorization solution for UR to predict the assignment group and create service level tickets.
The minimum confidence level required for the Universal Request auto categorization predictive intelligence suggestions to be considered	sn_uni_req_ml.auto_categorization_confidence	Determines the minimum confidence level required for the Universal Request application to provide auto categorization suggestions using the predictive intelligence solution.
Enable to auto-restrict requests with sensitive information	sn_uni_req_ml.sensitive_detection	Identifies and automatically marks the UR as sensitive if the request has sensitive information in the short description or description.
The minimum confidence level required to automatically mark Universal Requests containing sensitive information as restricted	sn_uni_req_ml.sensitive_detection_confidence	Determines the minimum confidence level required for the Universal Request application to mark Universal Requests containing sensitive information as restricted.
Enable to view similar closed Universal Request recommendations	sn_uni_req.similar_closed_universal_requests	Enables the application to use the Universal Request Similarity solution for UR to search and display closed Universal Requests that are similar to the UR created.
Other Properties		
Enable service transition comments while creating department requests from Universal Request	sn_uni_req.universal_request_show_service_transition	Enables or disables the visibility of additional comments to the requester that mentions the details of the department transition.

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Universal Request properties (continued)

Property	Property name	Description
Define the fields to automatically map for UR mapping configuration	sn_uni_req.com.snc.universal_request.fields.to.map	The list of fields that must be automatically mapped with UR fields for direct transfer between departments.
Define parent tables that should not create a UR for record producers	sn_uni_req.com.snc.ur.record_producer.exclude.parent.tables	Excludes the specified parent tables when a UR is created from a record producer.
General email address for Universal Requests	sn_uni_req.ur_email	Creates a universal request when an email is received in the general email address mailbox. **Note:** You can add multiple email addresses with comma-separated .
Enable Request (RITM) integration with Universal Request	sn_uni_req.com.snc.ur.request_integration	Creates a universal request when a request is submitted from a catalog item or record producer.

State mapping form

Use the State Mapping form to map your service specific state to the Universal request states.

State mapping form fields

Field	Definition
Table	Select the service or department table that you want to map to.
Order	Enter the order value to consider if multiple state mapping entries conditions are matched. **Note:** If there are multiple mappings and order value, the least order value is considered.
Condition	Enter the condition to evaluate and match when a service request state changes. For example, when the service request state is Close Complete, then the UR state is mapped to Close.
Universal Request state	Select the UR state to map.
Universal Request template	Select the fields that you want to populate other than the state.

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Transfer configuration form

Use the **Transfer configuration** form to configure your transfer details in the Universal Request application.

Transfer configuration form fields

Field	Definition
Table	The service or department table that you want to map for.
Transfer reason	The reason given when the task is transferred. The options to choose are: **With resolution** The primary task is addressed and is transferred with the resolution. **Without resolution** The primary task is not completed and is transferred without resolution.
Active	Indicates if the configuration for the department is active or not.
Mandatory fields	The mandatory fields that must be filled before a ticket is transferred.
Transfer Information	
Transfer state	The state of the department-specific ticket. The states are listed based on the department specific table that you select.
Transfer template	Select the fields that you want to populate other than the state.
Closure Information	
Closed state	State that you want to populate for the already transferred department ticket when UR is getting closed. The states are listed based on the department specific table that you select.
Closed template	Select the fields that you want to populate other than the state.

Mapping configuration form

Use the **Mapping Configuration** form to configure your fields and field mapping for cross-departmental transfers.

Mapping configuration fields

Field	Description
Name	Enter the name of your mapping configuration
Active	Indicates if the configuration for the mapping is active or not
Application	The application scope that the service belongs to
Table	Select the service or department table you want to map
Transfer Information	

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Mapping configuration fields (continued)

Field	Description
Transfer template	Select the template that you want to populate for the ticket transfer.
Associated Ticket Information	
Associated ticket template	Select the template that you want to populate for the associated ticket creation.
Create UR Information	
Create UR template	Select the template that you want to apply to the universal request while a department ticket is created.

Service Configuration form

Use the **Service Configuration** form to register your service to use the Universal Request application.

Service configuration form fields

Field	Definition
Service Name	Enter the name for your service.
Service Table	Select the application table that you want to use from the list.
Mapping Configuration	Select the mapping configuration that is defined for your service.
Application	The application scope that the service belongs to.
Service Set	Select the service set that your service belongs to.
Restrict requests	Select to mark all the requests created for the service as restricted.

Universal Request form

Use the **Universal Request** form to create a universal request task record.

Universal Request form fields

Field	Description
Number	Unique number generated for the universal request.
Opened	Date and time when the universal request was created.
Opened by	Agent who created the universal request.
Opened for	User who requested for this universal request.
Primary task	Task number, for example, an incident or HR case number that is associated with the universal request.

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Universal Request form fields (continued)

Field	Description
Restricted	Indicates that the request consists of sensitive data, and its use is limited on a need-to-know basis.
Contact type	Medium from which the universal request was created.
Priority	Points how quickly the service desk should address the request.
State	State of the universal request. By default, the state is **New**.
Impact	Impact value indicates a measure of the effect of an incident, problem, or change on business processes.
Assignment group	Group assigned to the universal request.
Assigned to	User assigned to the universal request.
Needs resolution review	When checked, and when the department agent closes the primary ticket, the Universal Request does not get closed. Universal Request state remains in **In Progress**, and the state reason changes to **Confirm Response**. This notifies the tier 1 agent (Routing agent) to either Accept or Reject the resolution provided in the primary ticket before closing the Universal Request for the requester.
Short description	Brief description of the request.
Description	Detailed description of the request.
Related Search Results section	
Displays a list of knowledge articles, catalog items, pinned articles, or similar Universal Requests based on the **Short description** entered.	
Notes section	
Watch list	Users to receive notifications when work notes are added.
Work notes list	Users to receive notifications when work notes are added. **Note:** The administrator must create an email notification for the work notes list.
Additional comments (Customer visible)	More information about the change.
Work notes	Information about how to resolve the universal request or steps taken to resolve it, if applicable. This note is for internal use. The work notes information is not visible to your customer.

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Universal Request form fields (continued)

Field	Description
Closure Information section	
Closed	Date and time when the universal request was closed.
Closed by	Agent that closed the request.
Close notes	How or why the universal request was closed.

Integrating Universal Request with other applications

Extend the capabilities of Universal Request and connect with other departments to assist with ticket resolution. By integrating with other applications, you provide a consistent ticketing experience and facilitate inter-department request transfers and multi-department use cases.

Integrate with IT Service Management

Universal Request provides an integration with the Incident Management application after you install Universal Request integration- Incident Management. With this integration, employees and agents can create incident records from universal request. IT routing agents can view these records from the Universal Request application. To modify the integration with the Incident Management application, use the Universal Request guided setup. The guided setup takes you through the setup and configuration process.

Integrate with HR Service Delivery

Universal Request provides an integration with the HR Service Delivery application after you install HR Service Delivery integration with Universal Request. This integration gives flexibility to the employees to create HR cases in the universal request record using the Now® Mobile app and Employee Center. HR routing agents can view these records from the Universal Request application. To modify the integration with the HR Service Delivery application, use the Universal Request guided setup.

Integrate with Request Management

Integrate Request Management with the Universal Request application to create a universal request when a request is submitted from a catalog item or record producer. To use this capability, enable the *sn_uni_req.com.snc.ur.request_integration* property under Universal Request properties. For more information on the integration and capabilities, see Request Management integration with Universal Request.

Integrate with Innovation Management

Integrate Innovation Management with the Universal Request application to enable your employee and agents to create an idea from a universal request (UR). This integration also provides the capability to transfer the idea to another department with or without resolution. For more information, see Innovation Management Integration with Universal Request.

Integrate with Workplace Service Delivery

Integrate Workplace Service Delivery services with Universal Request so that you can provide a convenient workplace experience to your employees. This integration provides a common help desk so that your employees can submit requests that are related to their workplace without

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having to search the Workplace services catalog. For more information, see Workplace Service Delivery integration with Universal Request.

Integrate with Universal Task

Universal Request provides an integration with the Universal Task application. This integration enables agents to task employees, track task progress, and provide quick resolution. For more information, see Configure your service for Universal Task .

Integrate with Microsoft Teams

The Universal Request integration with Microsoft Teams application enables Universal Request to integrate with Microsoft Teams. This integration enables agents and employees to collaborate using Microsoft Teams and resolve universal requests more effectively. For more information, see Universal Request integration with Microsoft Teams .

Quick start tests for Universal Request

Validate that Universal Request still works after you make any configuration change such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Universal Request quick start tests require activating the Universal Request (com.snc.universal_request), Universal Request: Integration for Incident management (com.snc.incident.universal_request), and Human Resources Scoped App: Core (com.sn_hr_core) plugins.

Universal Request quick start tests

Test	Description	Release version
UR: Transferring an HR case to an Incident	Validate if an HR case is transferred to an incident and an incident is created.	Quebec
UR: Restrict or Unrestrict universal request	Validates the following: • The fields are restricted and hidden when a routing agent restricts a UR. • Only agents with *sensitiveinfo_agent* role are allowed to unrestrict the request. • And, after the request is unrestricted all fields are visible. • sys-audit log access is available for agents.	Yokohama
UR: Universal Request creation with RITM	Verifies a catalog request for any item from self-service can be created when Universal Request Certified is enabled.	San Diego

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Universal Request in Agent Workspaces

Use Universal Request in Agent Workspaces to create, view, and work on the universal request.

Using Universal Request in the Agent Workspaces allows agents to:

- Create universal request
- Manage and triage universal request
- Assign and route the universal requests to the appropriate department

Agents can view all universal requests in a list view based on the states, such as new, in progress, or closed along with the primary task association.

For information on additional actions that agents can perform in Agent Workspace, see the following

- Create a Universal Request from an Interaction Record
- Transfer primary ticket in Agent Workspaces

Get started

Explore	Configure	Use
Learn about how employees, agents, and managers use Universal Request in the Agent Workspace.	Plan and configure your implementation.	Work on universal requests, and manage security and transfers in Agent Workspace.

Exploring Universal Request in Agent Workspaces

Learn to create universal requests and understand how user requests are resolved in the Universal Request in the Agent Workspaces.

As a user, when you initiate a chat using the service portal, the routing agent can interact with you using the workspace.

The routing agents can then perform the following actions:

- Create a Universal Request manually or from an Interaction Record.
- Self assign a Universal Request by clicking the **Assign to me** button or assign to an assignment group.
- Use Agent Assist capability to find similar UR, related knowledge articles, or catalog items that can help.
- If the agents have a routing agent role of a particular department, then they can create a department specific ticket. For example, and IT routing agent role can create an Incident from the Universal Request.
- Resolve, accept, or reject the resolution based on the state mapping configuration of your department.
- Route primary tasks back to UR with resolution or without resolution.

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Universal Request Overview dashboard

The Universal Request Overview dashboard is the default landing page of the Universal Request Agent Workspace. This dashboard contains the basic score card and reports. The information available on this page are:

- List of all Universal Request tasks that are assigned to you in the My Work section.
- Report on your team's work.

You can view more details of the universal requests by clicking the universal request number.

Setting up Universal Request in Agent Workspaces

Activate Universal Request in agent workspace and set up roles for performing the tasks.

Activating Universal Request in Agent Workspaces

Universal Request is activated in Agent Workspaces when you enable the Universal Request plugin (com.snc.universal_request) or Universal Request: Advanced Work Assignment plugin (com.snc.universal_request.awa).

Roles used for Universal Request in Agent Workspaces

Roles in Universal Request

Role	Description
UR administrator [sn_uni_req.ur_admin]	Set up and configure Universal Request roles for the agent workspace.
Routing agent [sn_uni_req.routing_agent, agent_workspace_user, workspace_user, sn_uni_req.universal_request_write, sn_uni_req.universal_request_read	Create, edit, view and resolve Universal requests.
Routing agent [sn_uni_req.routing_agent, agent_workspace_user, workspace_user, sn_uni_req.universal_request_write,sn_uni_req.universal_request_read, interaction_agent]	Handle interactions and create universal request from interaction.

Using Universal Request in Agent Workspaces

As a Routing Agent, use the Universal Request in Agent Workspaces to view, create, edit and resolve universal requests.

You can start working on Universal Request in the Agent Workspaces from one of these areas:

- Landing page
- List queue
- Global search

For additional information on working within Agent Workspace, see Using workspace.

Create a universal request in Agent Workspace

The Universal Request is a task that a requester creates from any of the following sources, such as mobile application, service portal, agent workspace, or using a virtual agent chat. As a routing

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agent, you can create universal requests from the Universal Request application on behalf of the requester to track and resolve issues.

Before you begin

Role required: sn_uni_req.routing_agent or admin

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, click **Universal Request** > **Open**.
3. Click **New**.
4. On the form, fill in the fields.

Universal Request form

Field	Description
Number	The unique number generated for the universal request.
Opened	The date and time when the universal request was created.
Opened by	The agent who created the universal request.
Opened for	The user who requested for this universal request.
Primary task	The task number, for example, an incident or HR case number that is associated with the universal request.
Contact type	The medium from which the universal request was created.
Priority	It identifies how quickly the service desk should address the request.
State	State of the universal request. By default, the state is **New**.
Impact	Impact value indicates a measure of the effect of an incident, problem, or change on business processes.
Assignment group	Group assigned to the universal request.
Assigned to	User assigned to the universal request.
Needs resolution review	When checked, and when the department agent closes the primary ticket, the Universal Request does not get closed. Universal Request state remains in **In Progress** and the state reason changes to **Confirm Response**. This notifies the tier 1 agent (Routing agent) to either Accept or Reject the resolution provided in the primary ticket before closing the Universal Request for the requester.
Short description	Brief description of the request.

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Field	Description
Description	Detailed description of the request.
Notes section	
Watch list	Users to receive notifications when work notes are added.
Work notes list	Users to receive notifications when work notes are added. **Note:** The administrator must create an email notification for the work notes list.
Additional comments (Customer visible)	More information about the change.
Work notes	Information about how to resolve the universal request or steps taken to resolve it, if applicable. This note is for internal use. The work notes information is not visible to your customer.
Closure Information section	
Closed	The date and time when the universal request was closed.
Closed by	The agent that closed the request.
Close notes	How or why the universal request was closed.

Create a Universal Request from an Interaction Record

Convert an Interaction Record to a Universal Request from the Universal Request Agent Workspace.

Before you begin

Role required: sn_uni_req.routing_agent or admin

About this task

Consider the following scenario. An IT service desk agent with a routing agent role receives a phone call on a request and creates a new call record or an Interaction Record with the notes. After reviewing the record, the agent realizes that the request belongs to HR and not IT. In this case, the IT Agent can create a Universal Record from the interaction record and assign it to the HR assignment group.

Note: Universal Request is not automatically created when a fulfiller creates a department ticket from an Interaction Record. You have to perform few manual steps to get this. For more information, see Create universal request automatically for department tickets via other channels.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, click **Interactions** > **My Interactions**.
3. Open the interaction record for which you want to create a Universal Request.
4. Click the **Create UR** button

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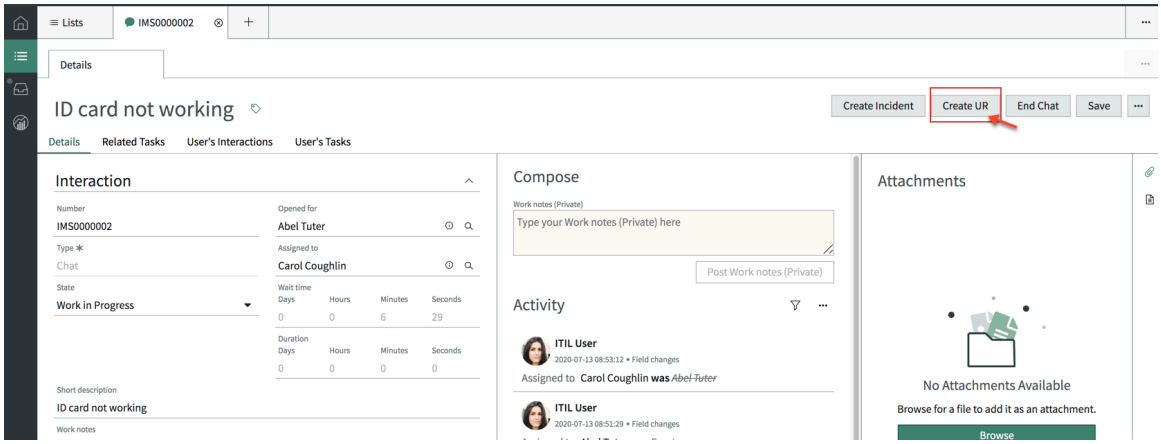

5. Click **Save**.

Cancel a universal request in Agent Workspaces

Change the state of the universal request to **Canceled** to cancel the request if the issue is resolved already or you no longer require the request.

Before you begin

Role required: admin

About this task

You can cancel a universal request only if there are no active or closed primary tickets attached to it. Also, the state of UR must be either **New** or **In Progress**. When the UR is canceled, email notifications are sent to the stakeholders associated with the request.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, click **Universal Request** > **Open**.
3. From the list of open universal requests, select the request you want to cancel.
4. Select **Canceled** from the **State** field.

> **Note:** If the person in **Opened for** tries to cancel the request, then they must enter the reason for canceling.

5. Click **Update**.

Use Agent Assist in Agent Workspace

Find similar Universal Requests that are open and closed, Knowledge articles, Catalog items, and Pinned articles using the Agent Assist capability in the Agent Workspace.

Before you begin

Role required: sn_uni_req.routing_agent or admin

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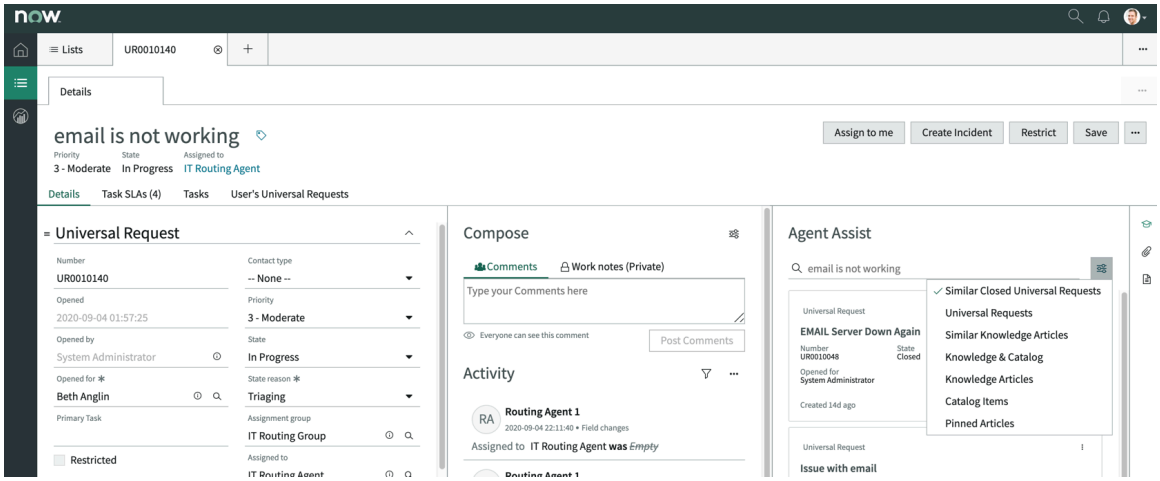


Procedure

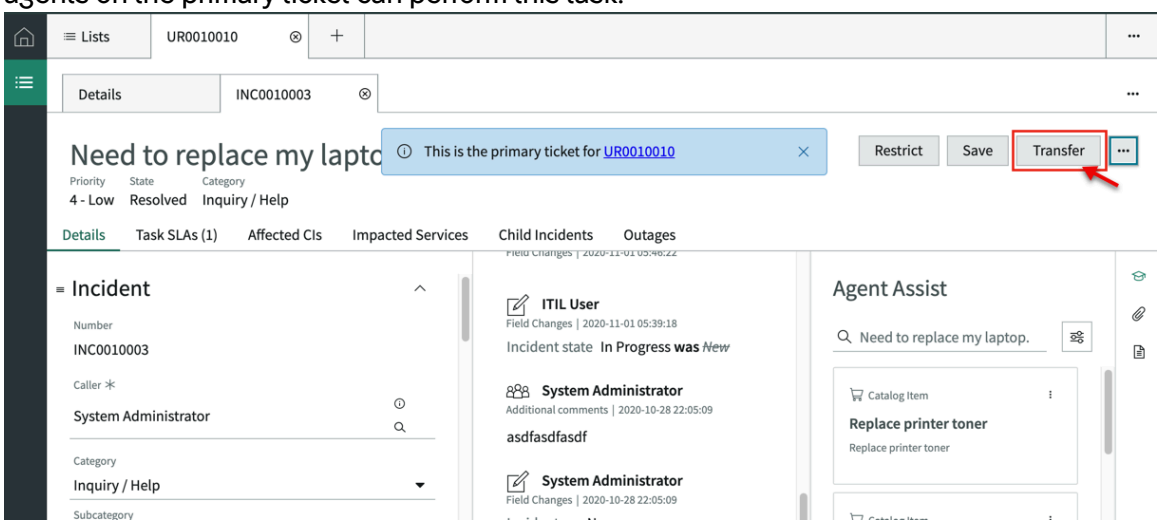
1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, click **Universal Request** > **Open**.
3. Click the universal request from the list or create a request.
4. In **Agent Assist**, click the settings icon ( ) and select your resource from the list.
   - Similar Closed Universal Request: To display all similar Universal Requests that are closed.
   - Universal Request: To display all similar Universal Requests that are available.
   - Knowledge and Catalog: To display all related knowledge articles and catalog items.
   - Knowledge Articles: To display all related knowledge articles.
   - Catalog Items: To display all related catalog items.
   - Pinned articles: To display all related pinned articles.

Transfer primary ticket in Agent Workspaces

You can transfer a primary ticket back to Universal Request, service set (department), or service either with resolution or without resolution.

Before you begin

Role required: No specific role is required. Agents part of the assignment group or assigned-to agents on the primary ticket can perform this task.



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A routing agent can either resolve and close a primary ticket or transfer it to back to UR or another department for review and closure. When a primary task is transferred back to UR, the ticket is no longer a primary ticket and the primary ticket field of the universal request becomes empty.

When transferring the ticket, the routing agent can choose the department and a specific service within the department or can just choose `I'm not sure` when they are not sure of the department or service to transfer to.

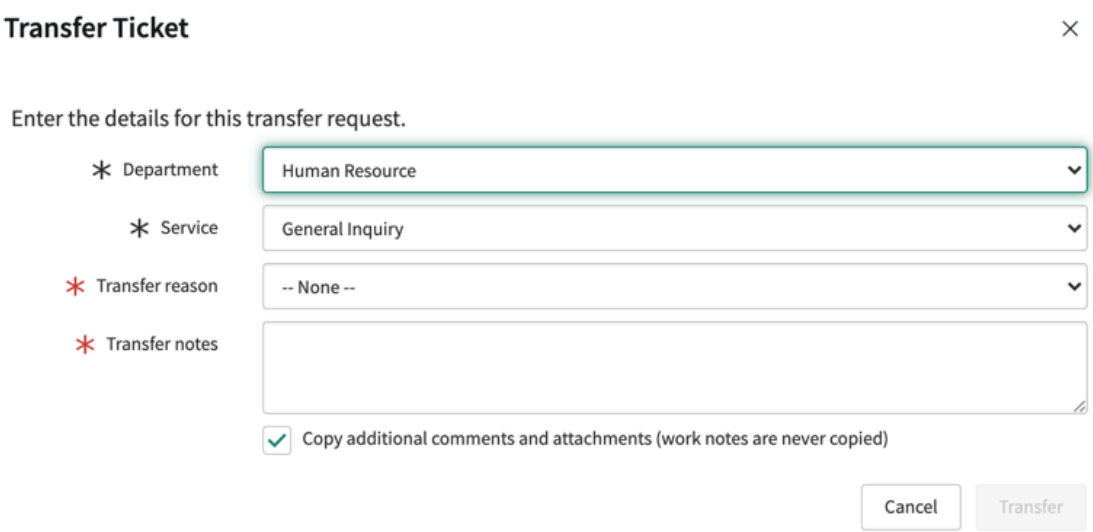
When you transfer a ticket back to universal request, you can transfer it with one of the following reasons:

Transfer with resolution

The request is resolved and transferred back to UR, a specific department, or service. Agents can choose this option when another department's help is required to fulfill the request.

Transfer without resolution

The request is not resolved or does not belong to the specific department, and is transferred back to UR.



Configure the *sn_uni_req.transfer_type* property in the **Universal Request properties** page to determine how to handle the primary ticket transfers. For more information, see Universal Request properties.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Open the primary task that you want to route to UR.
3. Click **Transfer**.
4. In the **Transfer Ticket** dialog, provide the following details.

   Note: Based on your transfer type configuration, the given fields are displayed. For more information, see Universal Request properties.

   - **Department**: Select the department from the list.
   - **Service**: Select the specific service of the chosen department.

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- **Transfer reason**: Select the reason from the list.
- **Transfer notes**: A brief description for routing the primary ticket that you want to pass to the UR Routing agent.
- **Copy additional comments and attachments**: Deselect if you do not want to transfer the ticket with additional comments and attachments. By default, all attachments and comments are transferred.

Note: Work notes are not copied while transferring.

5. Click **Transfer**.
   The ticket is transferred based on the transfer and transfer type configuration. For more information, see Transfer configuration.

Restrict universal request access in Agent Workspace

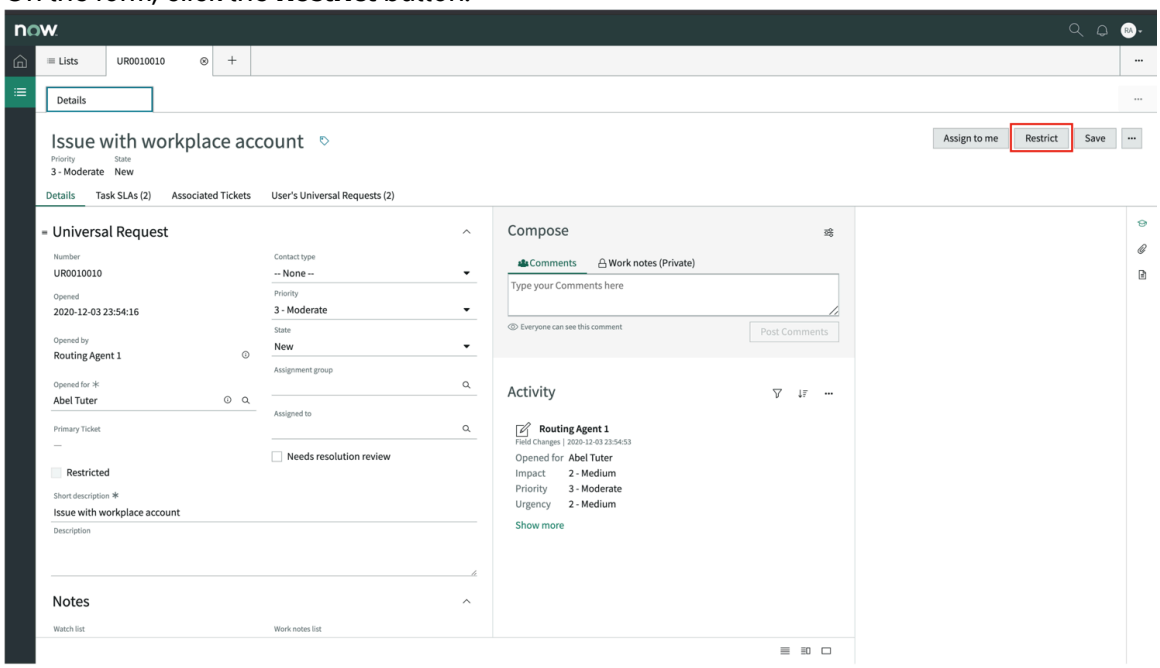
Mark a universal request as restricted when you identify the request contains sensitive information.

Before you begin

Role required: routing agents, sn_uni_req.sensitiveinfo_agent or service specific assignment group members

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, click **Universal Request** > **Open**.
3. Navigate to the universal request that you want to mark as restricted.
4. On the form, click the **Restrict** button.



The restricted fields are hidden, and the form is only for view purpose.

Note: To mark the request as unrestricted only agents with the access role can modify.

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Mark universal request as unrestricted in Agent Workspace

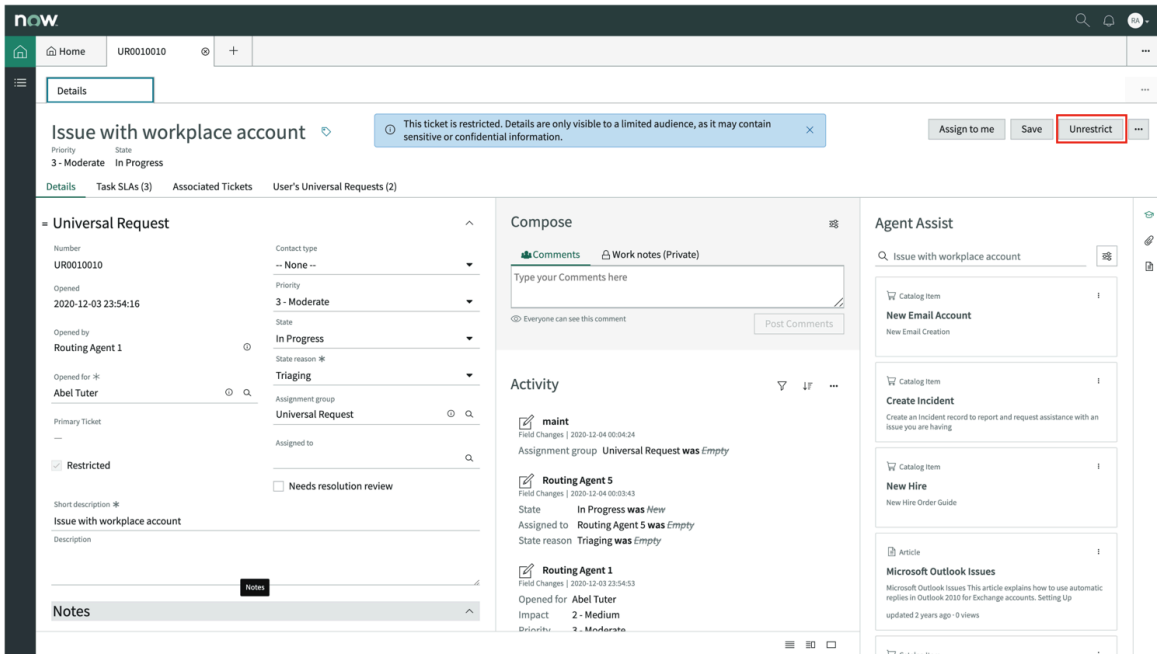
You can unrestrict a restricted universal request if you identify that the request does not have any sensitive information.

Before you begin

Role required: sn_uni_req.sensitiveinfo_agent or service specific assignment group members

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. From the navigation list, click **Universal Request** > **Open**.
3. Navigate to the universal request that you want to mark as unrestricted.
4. On the form, click the **Unrestrict** button.



The hidden restricted fields are now visible, and any agent can view the content.

Note: To mark the request as unrestricted only agents with the access role can modify.

Using agentic flows in Universal Request AI agent collection

Use the Universal Request AI agent collection to complete tasks autonomously.

Table 1. Available agentic workflows for Universal Request AI agent collection

Agentic workflow name	Description	Available AI agents
Universal Request Router agentic workflow	Enables employees to request a department agnostic ticket to avail services that are not readily accessible/ understandable via the catalog listings or the services that require collaboration across multiple departments.	• Universal Request departmental ticket creator • Record field value prediction AI agent

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Available agentic workflows for Universal Request AI agent collection

AI agents	Description
Universal Request departmental ticket creator	Automates the routing of universal requests to appropriate departmental ticketing systems by analyzing department predictions and creating properly configured HR cases or IT incidents with all necessary field mappings and reference tracking.
Record field value prediction AI agent	Predict fields of an incoming task/record by gathering incoming task sys_id. It can also provide a summary and justification of the field predictions.

Important: All agentic workflow and AI agent records are read-only by default.

To run the AI agents autonomously, you must first duplicate the agentic workflow, and then do the following steps:

- Activate the agentic workflow.
- Activate all agents within the agentic workflow.
- Activate the trigger to invoke the agentic workflow automatically. If you prefer to invoke it manually, activating the trigger isn't necessary.

For more information about duplicating an agentic workflow, implementing access control lists, and activating the required components, see the following topics:

- Duplicate an agentic workflow
- Activate an agentic workflow template
- Modify an AI agent

There might be AI agents installed with the Now Assist application that are not used in agentic workflows. To learn how to see all agents that are available to you, see Find AI agents.

Important: Some Now Assist skills, agents, and agentic workflows are turned on by default. For more information, see Now Assist skills, agents, and agentic workflows on by default.

Universal Request Router agentic workflow

Enables employees to request a department agnostic ticket to avail services that are not readily accessible/understandable via the catalog listings or the services that require collaboration across multiple departments.

Overview of Universal Request Router agentic workflow

The agents, tools, and triggers that are associated with the Universal Request Router agentic workflow are provided by Now Assist applications. You can activate the agentic workflow template by making triggers active. If you want to change this agentic workflow's instructions, you must duplicate it, adjust the settings to suit your specific needs, and activate the duplicated version of the agentic workflow instead.

Prerequisites and setup

Verify that the Universal Request AI agent collection Plugin (com.sn_ur_ai_agents) is installed.

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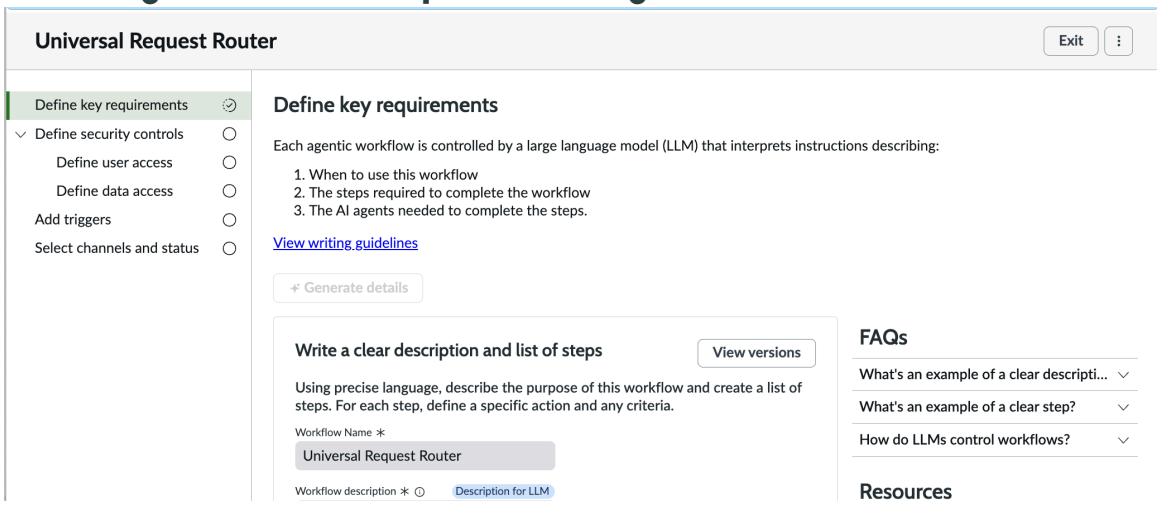
Accessing the Universal Request Router agentic workflow

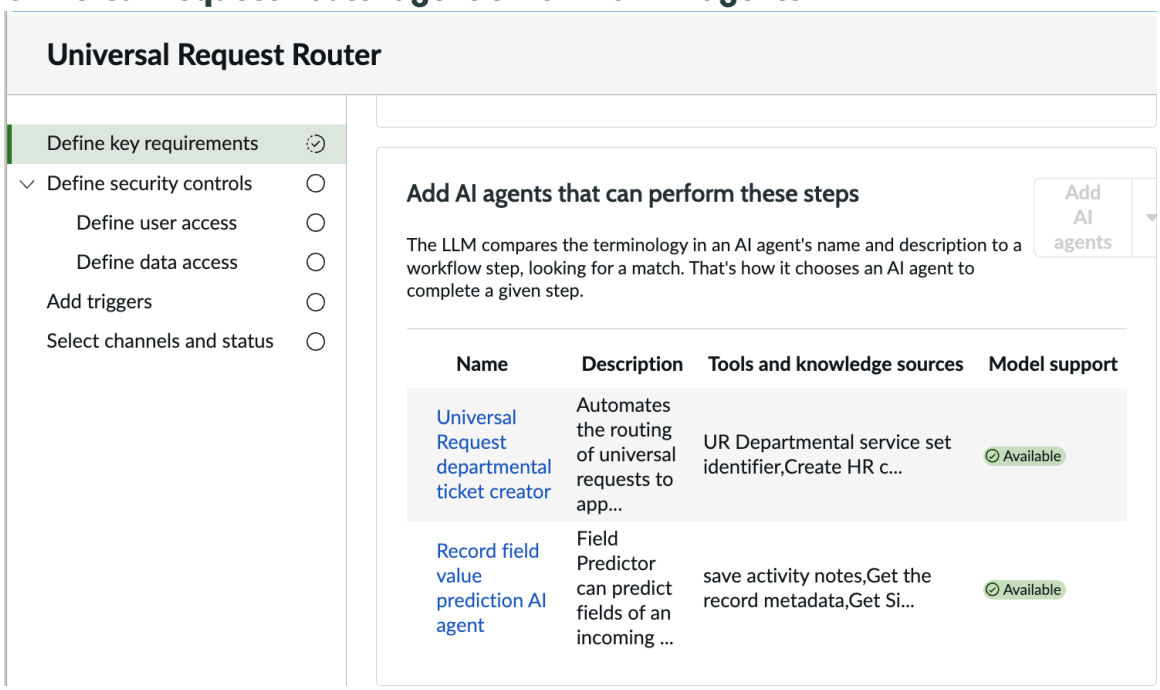


To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. Select **Agentic workflows** > **Universal Request Router** agentic workflow.

The first step of the guided setup includes a complete list of included AI agents. Selecting the name of an AI agent opens it in a new browser tab, where you can see the full description, role, agent instructions/prompts, and tools. Tools are displayed in the second step of the AI agent-guided setup, Add tools, and information.

Universal Request Router agentic workflow AI agents



The following table lists the agents that are used in the Universal Request Router agentic workflow.

Note: In the Define availability screen for the AI agent, make sure that the Status toggle is enabled to activate the AI agent.

Agents used in the Universal Request Router agentic workflow:

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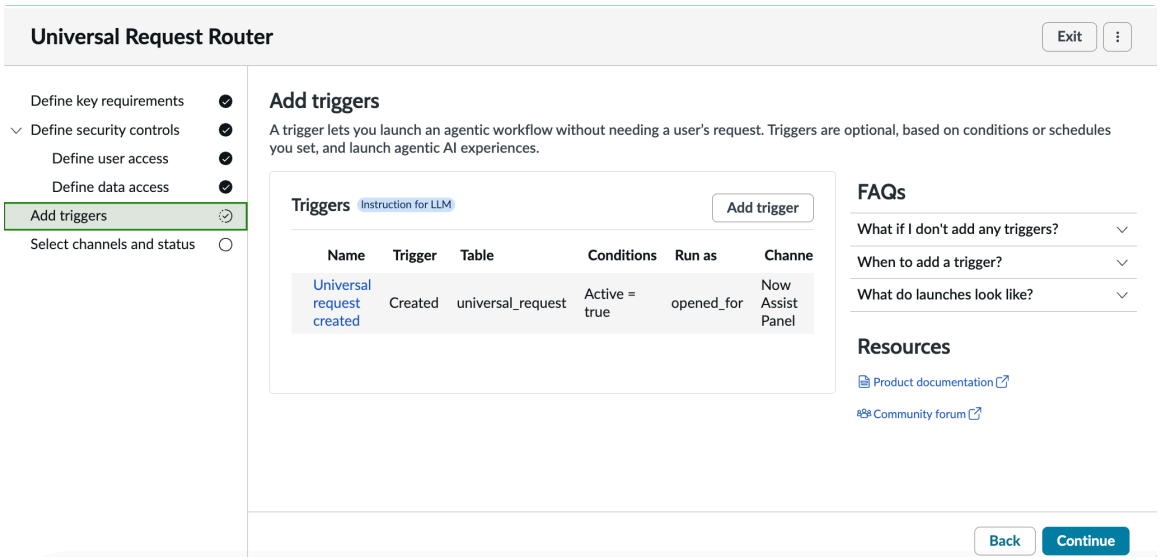
AI agent	AI agent role
Universal Request departmental ticket creator	Automates the routing of universal requests to appropriate departmental ticketing systems by analyzing department predictions and creating properly configured HR cases or IT incidents with all necessary field mappings and reference tracking.
Record field value prediction AI agent	Predict fields of an incoming task/record by gathering incoming task sys_id. It can also provide a summary and justification of the field predictions.

Triggers

Activate the triggers according to your organization's requirements.



Executing a test scenario

You can run this workflow on the Testing page of AI Agent Studio with the following utterance in the Task field: Help me resolve <UR case>.

The AI agent decision log displays the AI agents that are working to predict the department for the ticket, and create a primary ticket for the identified department. You can also watch their interactions, decisions, and thought processes as they happen in real time.

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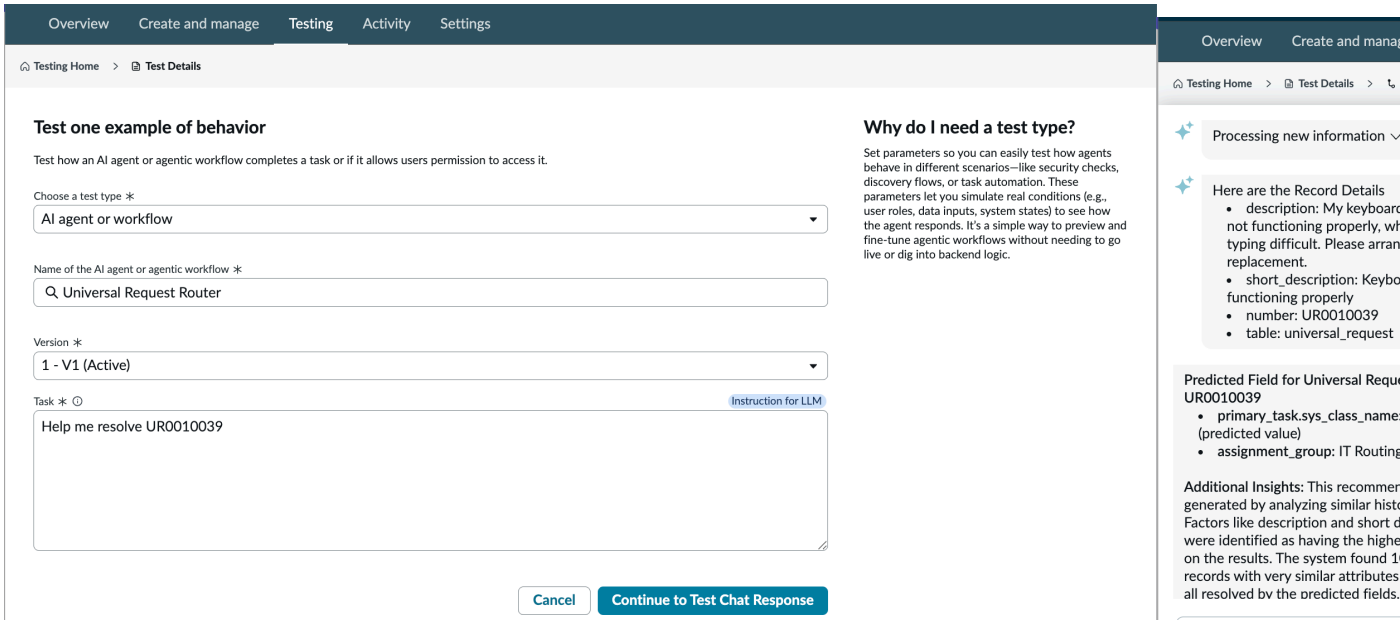
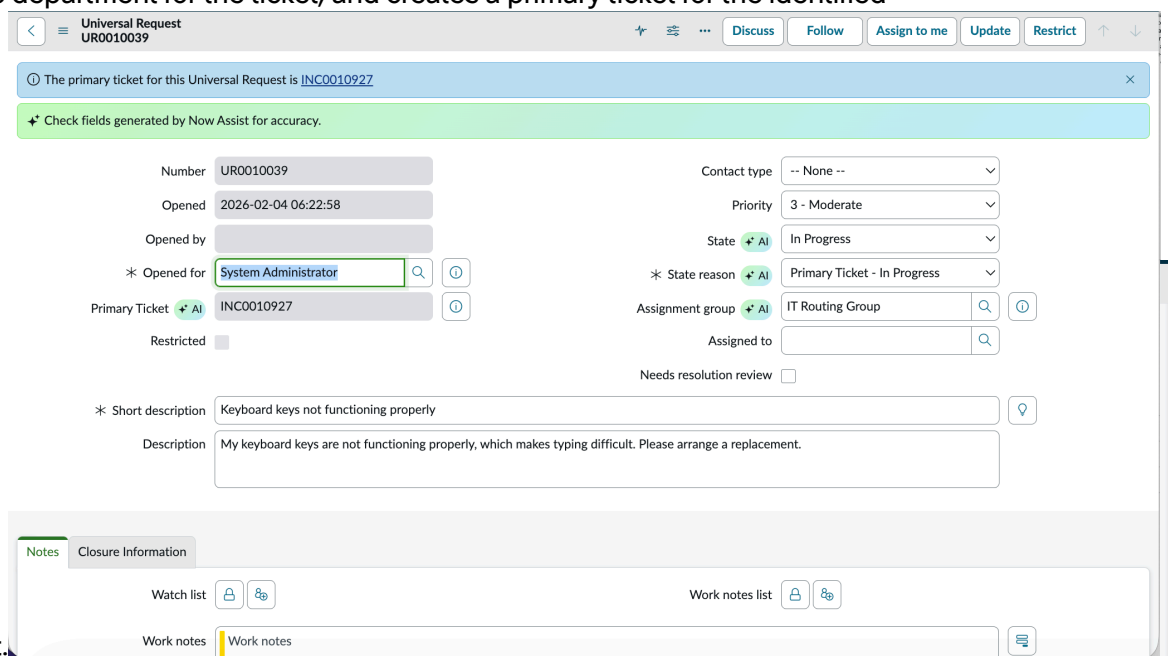


Predict and create a primary ticket in Universal Request page

This is an example of how the Universal Request Router agentic workflow automatically predicts the department for the ticket, and creates a primary ticket for the identified department.



Universal Task

The ServiceNow Universal Task application is a tasking framework that enables your agents to request extra information from employees who submit tickets or to task employees to accomplish an activity in order to resolve a ticket.

Let's consider an example. Aditi, an employee, has lost a laptop and has requested a replacement laptop. Dan, who is the agent working on this incident, needs the lost report from Aditi to proceed with the incident resolution. Dan could choose to use an activity stream to request the lost report but that adds a lot of extra work for Dan. By using an activity stream to get the report, Dan must close the incident and open a new request for the laptop. This process creates a disjointed experience for both Dan and Aditi.

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With Universal Task, Dan can task Aditi to upload a lost report from within the incident. On receiving the report, Dan can task Aditi to order a new laptop by using a submit catalog item task under the same incident.

Enhance employee experience

Activity streams can be confusing for agents and employees. Universal Task ensures a guided tasking experience where both agents and employees are aware of all the action items and the status of each item throughout the ticket resolution process.

Standardize employee experience across services

You can configure Universal tasks for any ticket type that extends the task table to ensure a consistent experience for your employees regardless of the ticket type or service type.

Increase fulfillment efficiency

Predefined task types enable agents to quickly task employees to get the information required for fulfilling the ticket in the most efficient way possible. Universal Task due dates ensure that your agents can share the fulfillment responsibility with your employees.

Explore  Learn about how employees, agents, and managers use Universal Task.	Configure  Plan and configure your implementation.
Use  Work on universal tasks.	Reference  Get details about components like fields, tables, and properties.

Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University

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- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Exploring Universal Task

With the ServiceNow Universal Task application, agents can create tasks for your employees. The agent can ask for additional information or request an action to resolve the parent ticket or request.

Universal Task offers pre-defined tasks for the agent to use. With Universal Task, you can:

- Create employee tasks from any ticket type that extends the task table.
- Enable departments to configure the tasks that solve their domain-specific use cases.
- Enable departments to create templates for commonly used task forms.
- Notify employees about the tasks that need their attention.
- Enable employees to complete tasks by using standard Universal Task portal widgets and the Now Mobile app.

Requester experience

Universal Task enables employees to view the tasks that are assigned to them within the same request that must be completed. Employees can also communicate with the agents within the task that was created. For example, an employee creates a universal request for a laptop. The agent that is assigned for this request can task the employee to submit a catalog request to order the laptop. Employees can view the task in the **To-Do** tab of the Employee Service Center. Employees can also view the task under the **Tasks** tab, under individual Requests in the **Requests** page of the Employee Service Center and Service Portal, if the respective service configures the tab as shown in Add a Task tab on the Standard Ticket page.

Agent Experience

Agents get an insight on the employees' actions and can task the employees as needed. Agents can create multiple tasks for a single request and view all universal tasks that were created for a ticket in the Related Lists section.

For more information on the types of task available, see Universal Task types.

Universal Task types

The task types in the Universal Task application enable your agent to assign pre-defined tasks to an employee. With these pre-defined tasks, your agent can task employees quicker and more efficiently. You decide which task types that you want to make available to the agents in your organization.

You can choose to make the following task types available in your own organization:

- Submit Catalog Item: Enables agents to task employees to submit catalog items.
- Upload Documents: Enable agents to task employees to upload documents that might be required for fulfilling a request.
- Checklist: Enables agents to create a checklist of tasks that the employee must complete.
- Collect Employee Input: Enables agents to collect information from the employee without creating additional case records or adding new fields to existing tables.

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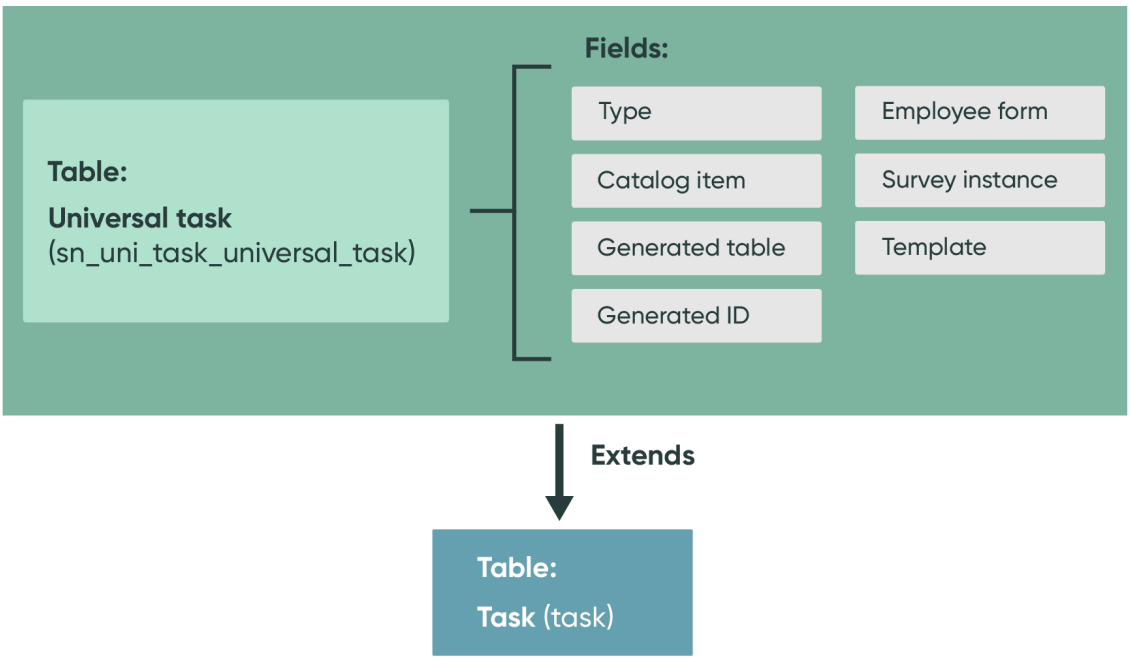
- Mark When Complete: Enables agents to assign a task that contains fulfillment instructions as rich text descriptions. An employee can show that a task is complete by clicking the **Mark complete** button.
- URL: Enables you to specify a URL that will be displayed in the task assigned to the user.

Universal Task data model

The Universal Task is a tasking framework that you can append to the ticketing system of any department in your organization. The Universal Task data model explains the tasking framework and its customizations.

You can create Universal Task for any department or service, such as a universal request, an incident, an HR case, or a legal matter. You can also assign multiple universal tasks for a single request.

The following diagram is a high-level overview of the Universal Task data model.



The Universal Task data model uses a combination of tables to store data:

- ServiceNow AI Platform tables.
- Tables that are included with the Universal Task application.

For information on the tables and components that are installed with the Universal Task application, see Components installed with Universal Task.

The Universal Task [sn_uni_task_universal_task] table extends the Task [task] table to include:

- The type of task for the current record, for example, Upload document.
- The catalog item if the task is of type Submit Catalog Item.
- The generated table that stores the table name that contains the requested catalog items.
- The generated ID that is the sys_id of the requested catalog item.

> **Note:** The catalog item, generated table, and generated ID are only applicable for the Submit Catalog item task type.

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- The employee form that is used to request information for the Collect Employee Input task type.
- The survey instance that stores the instance ID of the employee form for the Collect Employee Input task type.
- Task template to be used, if any, to auto-fill the Universal Task [universal-task] form.

The values for the State and Priority fields in the Task [task] table have been modified for Universal Task. The valid states for Universal Task are:

- 1: New (Draft state). Tasks at this state are only visible to the agent.
- 2: Work in Progress. Tasks at this state are assigned to and visible to the employee.
- 3: Complete. Tasks transition to the complete state when the employee completes the task.
- 4: Canceled. Tasks at this state can be canceled by agents before the task is completed.

The valid priority values for Universal Task are:

- 1: Critical. Highest priority for urgent or time-sensitive tasks.
- 2: High. Tasks that are important but not urgent.
- 3: Moderate. Tasks that should be completed.
- 4: Low. Optional tasks.

The Universal Task [sn_uni_task_universal_task] table follows data separation.

Universal Task configuration table

The Universal Task configuration table is configured to identify the following details:

- The Parent table, or the department-specific table that uses Universal Task. For example, if Universal Task is being used with HR cases, then the HR case table is the parent table. Universal Task can only be created on a table that is an extension of the task table.
- The task types that are available to the agents to task the requester with. For more details, see Universal Task types.
- The **Default Assigned to** field that points to the **requester** field in the parent table. To auto-fill the **Assigned to** field with the assignee while creating a task, configure the **Default Assigned to** field.

For more details, see Configure Universal Task for your service.

Specific task types might have additional configuration tables. For example, for the Submit catalog item task type, the Catalog task configuration [sn_uni_task_catalog_task_config] table determines which filters to apply to the catalog items that are available to an agent. For more information, see Configure the catalog items for your service.

The Universal task configuration [sn_uni_task_config] table and the Catalog task configuration [sn_uni_task_catalog_task_config] table follow process separation.

Universal Task in Now Mobile

You can complete universal tasks that are assigned to you in real time from your own mobile device by using the Now Mobile application.

From your mobile device, you can get notifications about updates in your universal tasks, you can learn when a new task is assigned to you, or you can see new comments that are added to one of your tasks.

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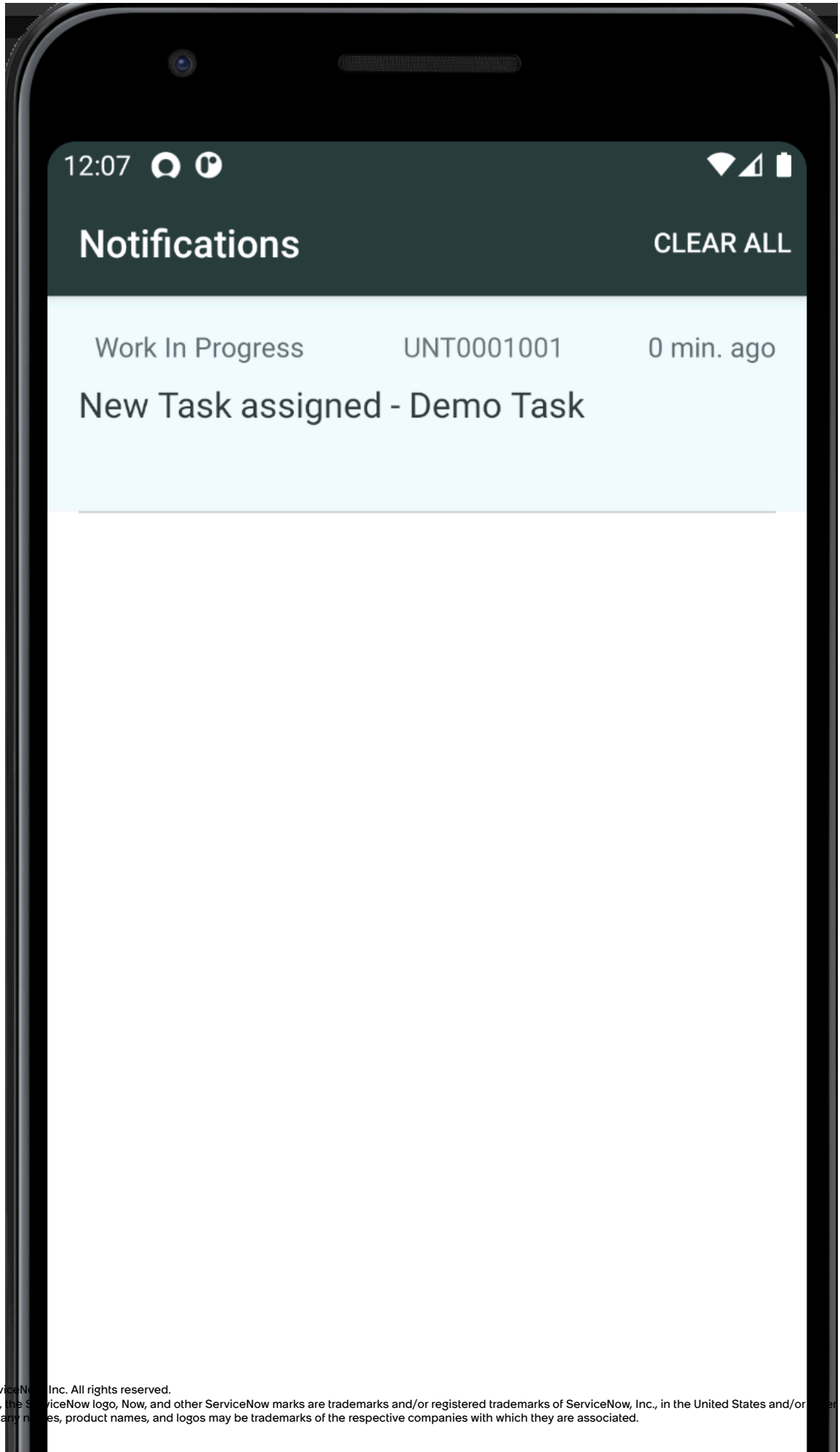

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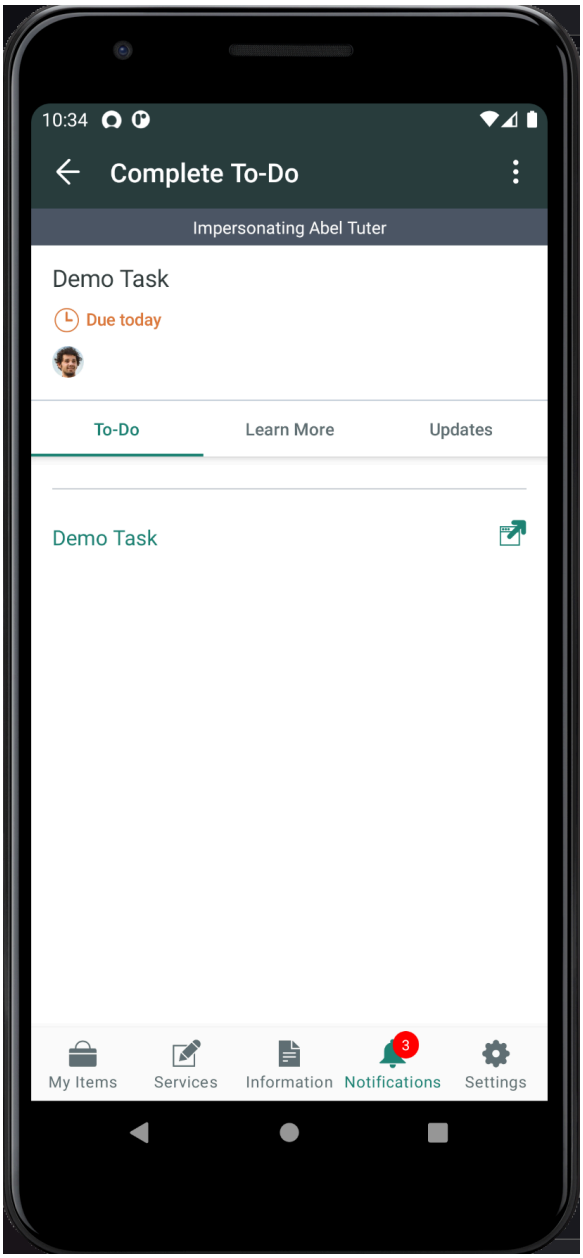
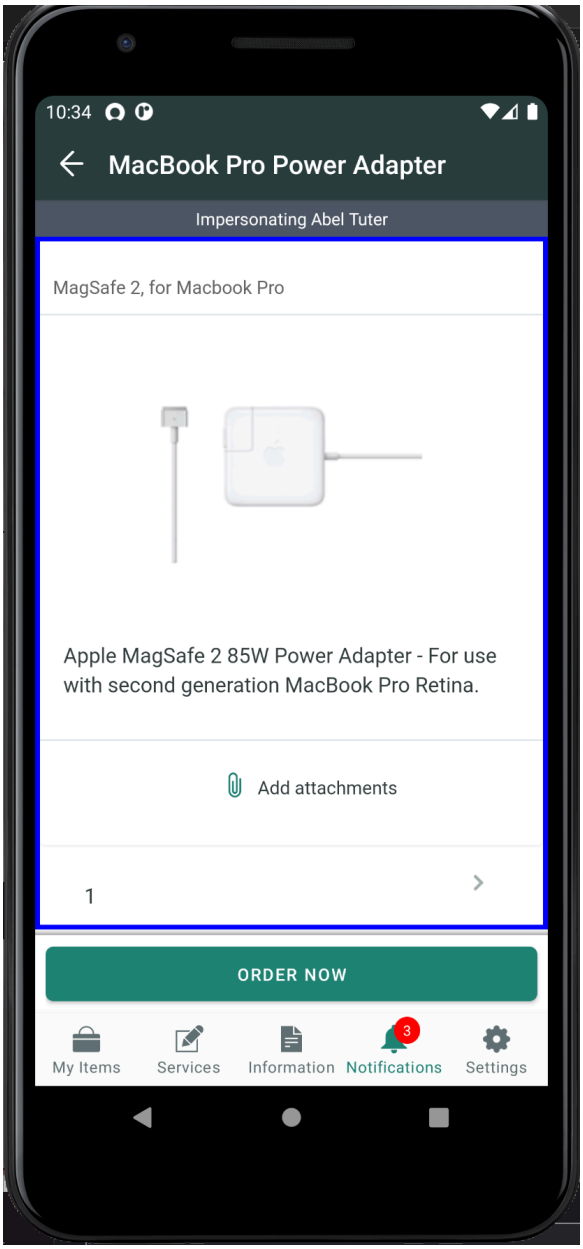
View and complete the universal tasks that are assigned to you in the **To-Do** tab. For detailed instructions, see View and update Universal Task using Now Mobile.





Stay updated about any activity on your universal tasks by finding the task details in the **Learn More** tab. You can add comments about your task or add pictures and documents as attachments in the **Updates** tab. You can even start a chat conversation with a virtual agent by using the ⋮ icon.

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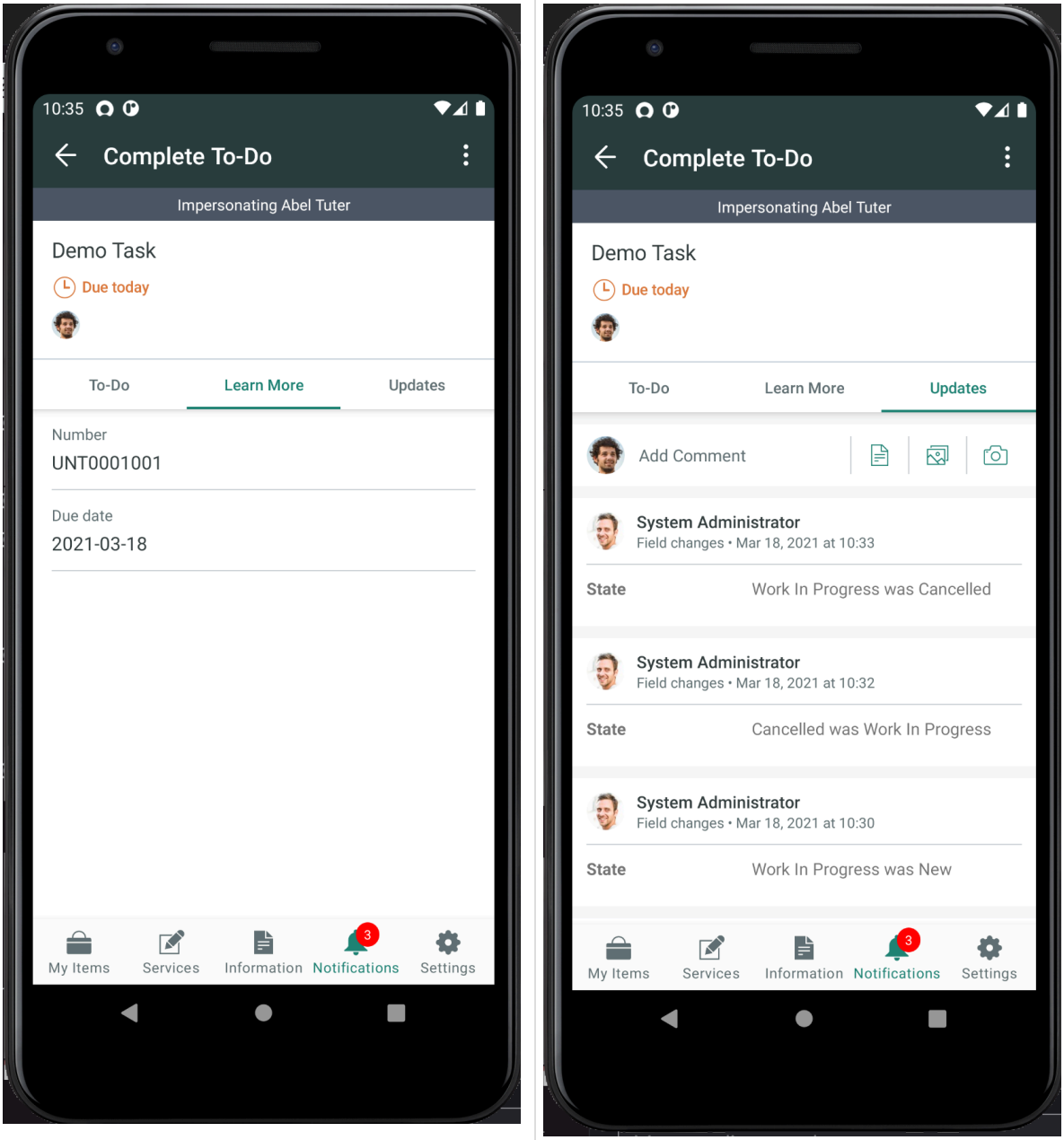

Setting up and configuring Universal Task

You must set up and configure the Universal Task application before you can enable agents to assign tasks to employees in order to fulfill a request.

Install Universal Task

You can install the Universal Task application (sn_uni_task) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see Get entitlement for a ServiceNow product or application.

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Role required: admin

About this task

The required Roles and Tables are installed with Universal Task. Ensure that the glide.enforce_security_scope.sn_uni_task property is set to true in Global scope.

For more information, see Components installed with Universal Task.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Universal Task application (sn_uni_task) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

   Visit the ServiceNow Store to view all the available apps, and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the ServiceNow Store version history release notes.
3. In the Application installation dialog box, review the application dependencies.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Universal Task.
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Components installed with Universal Task

Several types of components are installed with activation of the Universal Task application, including tables, user roles, and scheduled jobs.

Demo data is available for this feature.

Roles installed

Roles in Universal Task

Role title [name]	Description	Contains roles
Admin [sn_uni_task.admin]	View and configure the Universal Task application	None
Report view [sn_uni_task.report_view]	Access and view Universal Task reports	None
Employee form admin [sn_uni_task.emp_form_admin]	Create and manage Employee forms	survey_admin
Employee form creator [sn_uni_task.emp_form_creator]	Create and modify employee forms	survey_creator
sn_uni_task.template_admin	Create and manage Universal Task templates	None

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Tables installed

Tables in Universal Task

Table	Description
Universal Task [sn_uni_task_universal_task]	Store the Universal Task record details for a department-specific table.
Universal Task Configuration [sn_uni_task_config]	Store the list of task types for each department-specific table.
Catalog Task Configuration [sn_uni_task_catalog_task_config]	Stores the catalog items details of the department-specific table.
Base Task Configuration [sn_uni_task_base_task_config]	Serves as the base table for the configuration tables for all task types.
Employee Form [sn_uni_task_employee_form]	Stores the employee form records that were created for the Collect employee input task type.
Employee Input Task Configuration [sn_uni_task_emp_input_task_config]	Stores the roles that can view the responses of completed employee forms for each department-specific table.
Universal Task Template [sn_uni_task_template]	Stores the universal task templates with predefined field values that can be applied on Universal Task forms.
Universal Task Dynamic Template Mapping [sn_uni_task_dynamic_template_mapping]	Stores the dynamic template mappings between Universal Task fields and parent table fields.

Configuring your service for Universal Task

You can configure the UI actions and related lists for the Universal Task application so that you can view and create universal tasks for your service. Services are the various departments in your organization, such as IT, HR, and Legal.

Assign Universal Task admin role

Assign the sn_uni_task.admin role to the application administrators so that they can integrate and configure Universal Task. Roles control access to features, capabilities, and data.

Before you begin

Role required: sn_uni_task.admin

About this task

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Before you can assign the sn_uni_task.admin role to specific users, the logged-in user must also have the sn_uni_task.admin role. By default, the admin role contains the sn_uni_task.admin role. Administrators can assign the sn_uni_task.admin role to other agents who will work on the Universal Task configuration for their respective services.

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Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Open the group that you want to assign the sn_uni_task.admin role to.
3. In the Roles related list, click **Edit**.
4. In the Collection list, select **sn_uni_task.admin**.
5. Click **Add**.
6. Click **Save**.

The *sn_uni_task.min_admin_count* property in the System Properties [sys_properties] table ensures that a minimum number of scoped administrators are active at any given time for managing the application. For Universal Task, the minimum count of scoped admins is set to two by default. You can modify this property to increase the minimum count.

Note: Ensure that you have at least two agents with the sn_uni_task.admin role. If you assign only one agent with the role and that person is deactivated, you no longer will have an agent who can perform the Universal Task admin duties.

Create UI actions for your service with Universal Task

Create UI actions for your service so that agents can create universal tasks.

Before you begin

Role required: admin

Administrators and users with the ui_action_admin role can define UI actions. The UI actions must be configured for both the ServiceNow AI Platform form and the Agent Workspace form.

Procedure

1. Navigate to **All** > **System Definition** > **UI Actions**.
2. In the UI actions list, click **New**.
3. Enter the name of the UI action.
   For example, enter the name as `Assign Task`.
4. Select the service-specific table that Universal Task is being configured for.
   For example, select the Universal Request [universal_request] table for placing the Assign Task UI action on the Universal Task form view or workspace.

   Note: For any new UI action, ensure that you always select the appropriate service table.

5. **Optional:** Clear the **Show insert** check box.
   If the **Show insert** check box remains checked, the UI action to create a task is displayed even when the main ticket is being created.
6. Select the **Form Button** check box.
7. In the **Script** field, enter the following script.

```
var gr = new GlideRecord("sn_uni_task_universal_task");
gr.initialize();
gr.setValue("parent",current.sys_id);
action.openGlideRecord(gr);
action.setReturnURL(current);
```

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> **Important:** This script belongs in the Script field (server-side) of the UI Action. Do not copy it into the **Workspace Client Script** field unless you want additional client-side behavior in Workspace.

8. On the **Workspace** tab, select the **Workspace Form Button** check box.
9. On the form, fill in the fields.
   For more information on fields and descriptions, see Create a UI action.
10. Click **Submit**.

Add a Universal Task related list

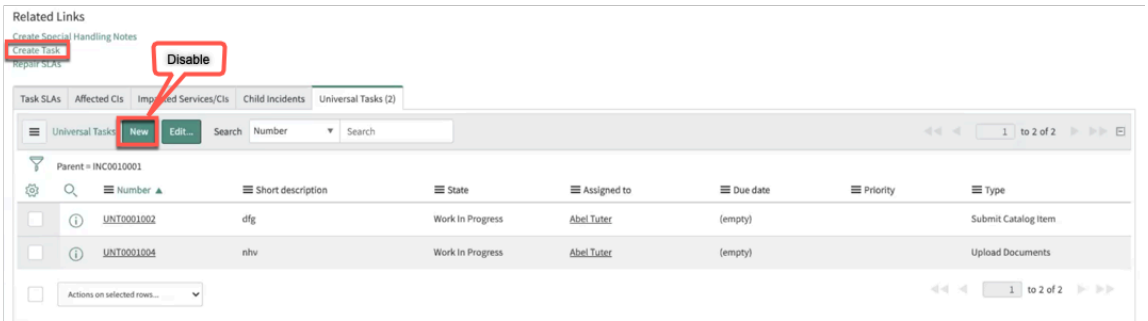
Add a Universal Task related list to a service-specific form in both the ServiceNow AI Platform and Agent Workspace to let agents view a universal task for the request.

Before you begin
Role required: admin

Procedure

1. Navigate to the table that the related list must be added to.
2. Open a service-specific form.
3. Right-click the additional actions context menu .
4. Navigate to **Configure** > **Related Lists**.
5. On the form, select the **Universal Task->Parent**.
6. Select a view name:
   - Default view: To add the Universal Task related list in the ServiceNow AI Platform form.
   - Workspace: To add the Universal Task related list in the Agent Workspace form.
7. Click **Save**.

> **Note:** Due to access control list (ACL) restrictions, the **New** button might not work while you are creating a task. You can hide the **New** button on the related list and use the UI action to create a universal task.



For more information on adding related lists, see Related lists.

Add a Task tab on the Standard Ticket page

Add a Task tab on the Standard Ticket page to let employees view the tasks that are assigned to them by the agents.

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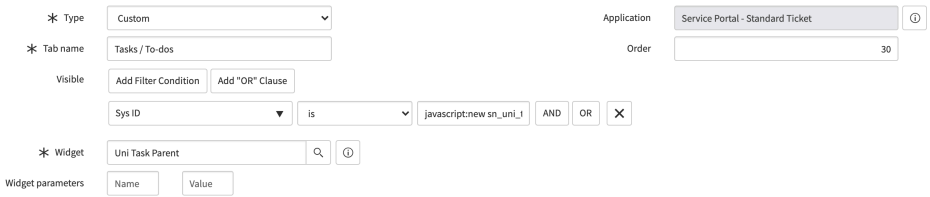
Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Click your service-specific table to open it.
3. In the Tabs Configurations related list, click **New**.
4. On the Tab configuration form, in the **Type** field, select **Custom**.
5. Enter the **Tab name**.
   For example, `Tasks/To-dos`.
6. Add the appropriate filter conditions to control the visibility of the tab.
   For example, set **Sys ID** to `javascript:new sn_uni_task.UniversalTaskUtils().hasTasksToShow(current)` to make the task tab visible only if there tasks are assigned to the employee.



7. In the **Widget** field, add a widget.

   Note: The Uni Task Parent is the default widget that you can use to add the **Universal Task** tab in the Standard Ticket.

8. Click **Submit**.

Define the agent criteria for Universal Task

Define the criteria for an agent so that the agent can access the parent table for Universal Task. The default criteria is that agents must have write access to the parent table.

Before you begin
Role required: admin

About this task
By using an extension point, you can add more conditions for agents to qualify as Universal Task agents. If this extension point is not implemented, agents with write access to the parent table are treated as UT agents for the parent table by default.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the API name column, search for *`sn_uni_task.UniversalTaskParentAccess`*.
3. To create an extension point script that defines the agent criteria for your service, click **Create Implementations** in the related link.
   To know more about extension points, see .
4. Specify the criteria for an agent to have access to the parent table.
   For example, you might want to ensure that the agent belongs to a specific assignment group in addition to having write access for the parent table.

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Configure Universal Task for your service

Configure the Universal Task application for your service so that you can create and assign tasks to employees.

Before you begin
Role required: sn_uni_task.admin

Procedure

1. Navigate to **All** > **Universal Task** > **Administration** > **Universal Task Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For more information on form fields and descriptions, see Universal Task Configuration form.
4. Click **Submit**.

Configure the catalog items for your service

Filter the catalog items that you want to show in the Submit Catalog Item task for your service.

Before you begin
Role required: sn_uni_task.admin

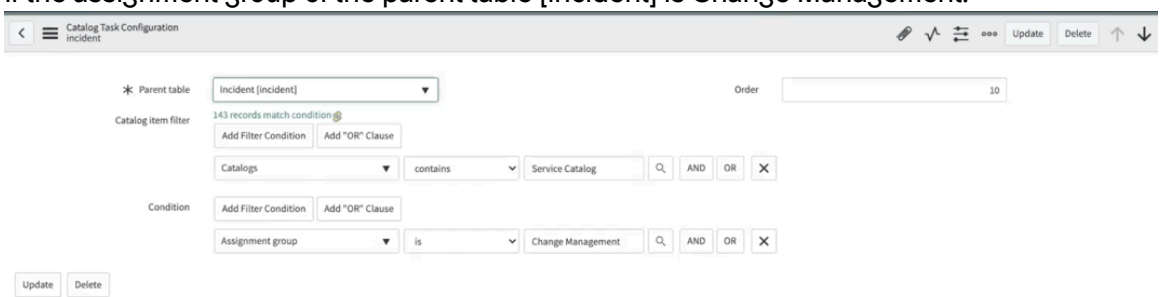
About this task
You can add filters to manage the catalog items that are available to a user. For instance, some catalog items might be restricted based on the location or service type of the request.

Procedure

1. Navigate to **All** > **Universal Task** > **Administration** > **Catalog Task Configuration**.
2. Click **New**.
3. Select your service-specific table as the parent table.

   Note: You can select only the service-specific tables that have been configured for Universal Task with the Submit Catalog Item task type.

4. To filter the items that you show in the Submit Catalog Item task, add the **Catalog item filter** field.
5. Enter the **Order** value.
6. Add a parent table **Condition** for the catalog item, if any.
   For example, in the following configuration, the catalog item filter is applicable only if the assignment group of the parent table [incident] is Change Management.



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You can create multiple conditions to configure your catalog items. The conditions with lower order values get precedence over higher order values.

7. Click **Submit**.

Configure the roles to view employee forms

Configure the roles to enable your agents to view the employee responses in the completed Universal Task employee forms.

Before you begin
Role required: sn_uni_task.admin

Procedure

1. Navigate to **All** > **Universal Tasks** > **Administration** > **Employee Input Task Configuration**.
2. Click **New**
3. On the form, fill in the fields.
   For more information on form fields and descriptions, see Employee Input Task Configuration form.
4. In the **Parent table** field, select the parent table.

   Note: You can only select the tables that have been configured for Universal Task.

5. In the **Response view roles** field, select the roles for your agents.
6. In the **Condition script** field, add a condition script, if any.
7. Click **Submit**.

Configure the extension points for Universal Task

Provide the implementation for childTaskCancelled, childTaskCompleted, childTasksClosed of the scripted extension point to execute the custom logic of the service, when a universal task is canceled, completed, or closed.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_uni_task.UniversalTaskCloseEvents`.
3. To create your service-specific extension point script, click **Create Implementations** in the related list.
   For more information, see Using extension points to extend application functionality.
4. Click **Update**.

Display the universal tasks for a request in Now Mobile

Display all the universal tasks that are assigned for a particular request by simply configuring the **Tasks** tab in Now Mobile.

Before you begin
Role required: admin

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Procedure

1. In the navigation panel, enter `sys_sg_form_segment.list`.
2. In the Form Screen Segments page, click **New**.
3. Select the service-specific **My Request** form screen.
   To find your service-specific **My Request** form screen, select a **My request** form screen and then preview the record.
4. In the embedded screen field, select **Tasks**.
5. In the **Order** field, enter a number to indicate the order that you want the tab to appear in.
6. Click **Update**.

Hide the template bar on the Universal Task form

Hide the template bar for the Universal Task form because it does not include Universal Task templates.

Before you begin
Role required: admin

Procedure

1. In the navigation panel, enter `sys_properties_list.do`.
2. On the System Properties page, click **New**.

   Note: Ensure that the application is in Global scope.

3. On the form, fill in the fields.

System Property form

Field	Value
Name	glide.ui.show_template_bar.sn_uni_task_universal_task
Type	true | false
Value	false

4. Click **Submit**.
5. To clear the cache of your instance, in your browser, enter `<server_url/cache.do>`.

Remove the Universal Task admin role from the admin role

After system configuration, remove the Universal Task Admin role (sn_uni_task.admin) from IT System Administrator role (admin) to help prevent IT System Administrators from viewing sensitive information via forms, lists and UI.

Before you begin
Role required: admin

About this task
By default, a system administrator also contains the sn_uni_task.admin role and can access the Universal Task information. To secure your application, remove the sn_uni_task.admin from the admin role. By doing so, you prevent the user with a default admin role from viewing all the Universal Task information.

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Note: Ensure that you have completed setting up Universal Task before removing the sn_uni_task.admin role from the admin role.

Procedure

1. Log in as admin.
2. Navigate to **User Administration** > **Roles**.
3. Select **admin**.
4. On the **Contains Roles** tab, click **Edit**.

   Note: If you do not see the **Edit** button, change the Application scope to `Global`.

5. From the Contains Roles List column, highlight and move **sn_uni_task.admin** to the Collection column.
6. Click **Save**.

Email notification layout for Universal Task notifications

Use the email notification layout and template shipped with the Universal Task application (sn_uni_task) to deliver email notifications. Apply the layout to email notifications to elevate their look and feel and to deliver branded notifications.

The following table lists the email notifications shipped with Universal Task. You can choose to modify the email body or keep the default versions.

Email notifications for Universal Task

Notification name	Used for	Fields where recipients are identified
Universal Child Tasks Closed	Sends an email notification when all child Universal Tasks of the parent are closed.	Assigned to field of the parent
Universal Task Assignment For Assigned To	Sends an email notification when the task is assigned and either the assignee changes or the state changes to Work In Progress.	Assigned to, Watch list
Universal Task Assignment For Group	Sends an email notification when the task is assigned to a group and either the group changes, or the state changes to Work In Progress.	Assignment group, Watch list
Universal Task Cancelled	Sends an email notification when the task is cancelled.	Opened by, Assigned to field of the parent
Universal Task Cancelled For Assigned To		Assigned to, Watch list
Universal Task Cancelled For Group		Assignment group, Watch list
Universal Task Changed For Assigned To	Sends an email notification when the task type, short	Assigned to, Watch list

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Email notifications for Universal Task (continued)

Notification name	Used for	Fields where recipients are identified
Universal Task Changed For Group	description, or description is updated.	Assignment group, Watch list
Universal Task Commented For Assigned To	Sends an email notification when there is a new additional comment on the task.	Assigned to, Watch list, Opened by, Assigned to field of the parent
Universal Task Commented For Group		Assignment group, Watch list, Opened by, Assigned to field of the parent
Universal Task Completed	Sends an email notification when the task is complete.	Opened by, Assigned to field of the parent
Universal Task Completed For Assigned To		Assigned to, Watch list
Universal Task Completed For Group		Assignment group, Watch list

Important: These email notifications are automatically set up for a new user of Universal Task.

If you are an existing user of Universal Task on a release prior to San Diego, upgrade to Employee Center or Employee Center Pro or install the Employee Experience Foundation plugin from ServiceNow Store to start using these email notifications.

Domain separation and Universal Task

Domain separation is supported for ServiceNow Universal Task. Universal Task enables agents to request extra information from the employee or to task the employee to accomplish an activity, in order to resolve a ticket. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

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Overview

In the Universal Task framework, all the configurations are process domain-separated, and the data tables, namely, Universal Task table, Employee form table, and Task template table are data domain separation offerings.

How domain separation works in Universal Task

The configuration tables in Universal Task are process domain-separated. So, the configurations created by the parent domains are also implemented in the child domains. However, a child domain can override the configuration, if needed. For example, In an organization, the services are the child domains, while the organization is the parent domain. The task types available for Universal Task in a particular organization, will also be available for the various services of the organization. However, a particular service can override the task types as needed.

The data tables in Universal Task are data domain-separated. So the data stored in any of the child domains is accessible to the parent domain. For instance, if a service is using task templates, the data captured in the Task templates table for the service domain is accessible to the organization domain, but not to the domains of other services, unless configured.

Tables

The following Configuration tables are process separated.

- sn_uni_task_config
- sn_uni_task_base_task_config
- sn_uni_task_catalog_task_config
- sn_uni_task_emp_input_task_config

The following Data tables are data separated.

- sn_uni_task_universal_task
- sn_uni_task_template
- sn_uni_task_employee_form

Related topics

Domain separation for service providers

Using Universal Task

Agents can use the Universal Task application to create tasks for employees and to manage the request resolution. Employees can view and complete tasks assigned to them using the Employee Service Center or the Now® Mobile app.

Create a universal task

Create a universal task for a request and assign it to the employee or create multiple tasks for a request by using Universal Task.

Before you begin

Role required: Configurable by your service

About this task

Universal Task agents, as configured in Define the agent criteria for Universal Task can create a new universal task using the UI action available on the ticket page.

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Note: To control the access for creating a task, configure the visibility of the UI action for creating Universal Task. For more information, see Create UI actions for your service with Universal Task.

When a universal task is created, it is auto-assigned to the employee as configured in Configure Universal Task for your service. The employee receives a notification and can view or update the task from the ServiceNow Employee Service Center. If the employee accesses the task from the ServiceNow AI Platform, they can only add a comment and add people to the watch list.

Procedure

1. Open the ticket that you want to create a universal task for.
2. Click the UI action for creating a universal task.

   Note: The name of the UI action is configurable and can vary. For more information, see Create UI actions for your service with Universal Task

3. On the form, fill in the fields.
   See Universal Task form for more information.
4. Select one of the following.

Option	Description
Ready for work	Task is created. The state of the task changes to Work in Progress, and the employee is notified about the task.
Submit	Task is created. The state of the task remains New, and no notification is sent to the employee.

Result

Employee experience: A new task is created for your request. You can view and complete the task in the **To-Do** tab of the Employee Service Center. You can also view and complete the task in the task tab of the associated request, if configured in standard ticket configuration. You receive notifications if the task is canceled, closed, completed, or if a comment is added to the task. Notifications are sent to the stakeholders when changes are made to the task.

Agent experience: You can now view or edit the task. You can also add more tasks to the same request.

View and update Universal Task using Now® Mobile

View and update the universal tasks that are assigned to you by using the Now Mobile app.

Before you begin

Role required: Requester

Procedure

1. On your mobile device, tap the Now Mobile app icon ().
2. To view all tasks that are assigned to you, tap **My Tasks**.
   To view Universal tasks for a particular request, tap **My Requests**, open the request and go to the **Tasks** tab.
3. Tap a universal task to open it.
4. Go to each tab to do the following.

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Tab	Description
To-Do	View and complete the tasks that are assigned to you. ○ If the task type is Upload Documents, upload the required document using **Add attachments** and mark the task com plete. You can upload multiple documents or images. ○ If the task type is Submit Catalog Item, the task is automati cally marked complete after you submit the catalog item. ○ If the task type is Mark when Complete, mark the task com plete once the task described in the Description is complet ed. ○ If the task type is Checklist, mark at least one of the items as complete to mark the task complete. ○ If the task type is Collect Employee Input, tap the to open the employee form. After you submit the form, the task is marked complete. If you leave the form midway, your responses are saved. You can complete and submit the form later.
Learn More	View task details.
Updates	View or add comments or attachments to the task.

Create an employee form

Create or modify an employee form to collect employee input. Employee forms are questionnaires that are built using the survey designer to collect or update information from employees.

Before you begin

To use this task, first create an employee form record. Then, use the survey designer to design a questionnaire for the employee.

Role required: sn_uni_task.emp_form_admin or sn_uni_task.emp_form_creator

Note: You will need sn_hr_le.activity_reader role or any role that starts with sn_hr_core to have read access to the employee form page being utilized, and view data that is passed between case and child task.

Procedure

1. Navigate to **All** > **Universal tasks** > **Employee forms**.
2. Click **Create New**.
3. On the form, fill in the fields.
   For more information on form fields and descriptions, see Employee form.
4. Right-click the form header and click **Save**.
   The **Form designer** button appears.
5. To open the survey designer in a new window, click **Form designer**.
6. To build the questions for your employee form, use the survey designer.
   For more information on the question types, see Survey designer elements.
7. Click **Save and Publish**.

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Result
You can now assign the form to an employee by using the Collect Employee input task. To view the employee responses, click **View Responses** after the task is marked complete.

Note: You must have specific roles to view the employee responses. For more information, see Configure the roles to view employee forms

Universal Task templates

Task templates help agents to create Universal Task records by auto-populating fields in a template.

The task template [sn_uni_task_template] table follows data separation. For more information, see Domain separation and Universal Task.

Using task templates, you can create templates for common use-cases. You can also set a schedule to periodically create records based on a template.

A task template can have static and dynamic mappings. In static mappings, the values of fields are individually specified and fixed. In dynamic mappings, the field values are updated and mapped from another table. You can create dynamic template mappings between the fields of the Universal Task table and any other parent table that uses Universal Task. Using the dynamic template mappings, you can do the following:

- Map Universal Task fields to parent table fields.
- Create text templates for fields in the parent table.
- Offset date fields by specific durations.

Create a template using the Universal Task template form

Create a template for any service table to automatically populate fields on a form. Creating templates for common use cases enables agents to create universal tasks faster and ensures uniformity of field values.

Before you begin
Role required: sn_uni_task.template_admin

About this task
A task template can have static and dynamic mappings. In static mappings, the values of fields are individually specified and fixed. The following procedure is for creating a static template mapping. For information on dynamic templates, see Create dynamic template mapping.

Procedure

1. Navigate to **All** > **Universal task** > **Task templates** > **Create new**.
2. On the form, fill in the fields.
   For more information on form fields and descriptions, see Universal Task template form
3. **Optional:** Select **Schedule** to create a scheduled job to create records based on this template.
   For detailed instructions, see Create records based on a template.
4. Click **Submit**.

Create a task template by saving a form

Save a populated Universal Task form as a template. This is an alternative method for creating a task template.

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Before you begin

Make sure you have a Universal Task form that you want to use. If you need to create a form, see Create a universal task.

Role required: sn_uni_task.template_admin

Procedure

1. Navigate to a Universal Task form.
2. Complete the form as it should appear when a user applies the template.
3. Right-click the form header and click **Save**.
4. Click **Create Universal Task Template**.
   The task template with the filled forms appears.
5. In the **Name**, enter a descriptive name for the template.
6. Set the **Parent table** field to a service-specific table.
   If you choose not to select any table, then the configuration will apply to all tables.
7. Make additional changes as required.
8. Click **Submit**.

Create dynamic template mapping

Create dynamic templates to map fields on a Universal task form to corresponding fields on the parent table form. Dynamic templates help agents to map parent table fields to Universal task fields.

Before you begin

Ensure that you have write access to the parent table that is used for the template mappings.

Role required: sn_uni_task.template_admin

About this task

Dynamic template mappings can be created for templates that have an assigned parent table. In a dynamic mapping, the value of a field is updated with the value of the mapped field in the parent table. Dynamic template mappings get precedence over static template mappings. In static template mappings, fields are set to specific values. For more information on how to create a static template, see Create a template using the Universal Task template form.

Procedure

1. Navigate to **Universal Task** > **Task Templates** > **All**.
2. Open the template that you want to create mappings for.
3. In the Universal Task Dynamic Template Mappings related list, click **New**.
4. In the **Universal task field** field, select the field that must be mapped.
5. In the **Parent table field** field, select the field that must be mapped to the previously selected field from the **Universal task field** field.
   Depending on what type of field is selected in the **Universal task field** field, the **Advanced** option appears. If you select the **Advanced** option, the following options are available based on the input type of the Universal task field.

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Input type for the Universal task field	Advanced options
String, such as Short description	The **Value** field appears. You can map your Universal task to multiple fields from the par ent table. You can also add a text template.
HTML, such as Rich description	The **Value** field appears. You can map your Universal task to multiple fields from the par ent table. You can also add a text template.
Date field, such as Due date	○ The **Date offset type** field appears. ○ If you set the **Date offset type** field to **Be fore** or **After**, then the **Date offset by** field appears.

6. Click **Submit**.

Result
A mapping was created for a specific Universal task field. You can repeat this procedure to map more fields.

Use Task templates

Use a task template to auto-populate a Universal Task form. Using a task template enables agents to create tasks faster.

Before you begin
Role required: write access to the parent table, if the parent table is defined in the template configuration. If no parent table is defined, then any agent can access and use the task templates.

Procedure
1. Open the ticket that you want to create a universal task for.
2. Click the UI action for creating a universal task.
3. In the **Template** field of the Universal Task form, select the template to be used.
4. Fill in the fields that are left empty by the template.
   Depending on what template you used, some of the fields will already be populated by the template. You can fill in the rest of the fields yourself. For more details on what each field means, see Universal Task form
5. To create your task, click any of the following buttons.

Button	Description
Ready for work	Task is created. The state of the task changes to Work in Progress, and the employee is noti fied about the task.
Submit	Task is created. The state of the task remains New, and no notification is sent to the employ ee.

Adding a Universal Task list category in SOW core

Add the Universal Task list category to the new Service Operations Workspace core so that agents can access and navigate through various modules directly from the new workspace.

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Before you begin
Role required: admin

About this task
Due to the deprecation of the old service operations workspace, the Universal Task category listing isn't displayed in the new workspace. To display the relevant modules, you can manually add records to the table sys_ux_list_category.

Procedure
1. Navigate to **All** > **System Definition** > **Tables** > **UX List Categories** > **Show List**.
   To access the list directly, you can use the navigation search bar and perform a search by using the table name sys_ux_list_category.list.
2. Insert records in the sys_ux_list_category table by selecting **New**.
3. On the form, fill in the fields.
   For more information, see UX List Category form.
4. Select **Submit**.

Result
The Universal Task list category is added to the Service Operations Workspace core.

Add lists under the Universal Task list categories

Add lists under the newly created Universal Task list category in Service Operations Workspace so that agents can access these modules from the new workspace.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Definition** > **Tables** > **UX Lists** > **Show List**.
   To access the list directly, you can use the navigation search bar and perform a search using the table name sys_ux_list.list.
2. Add records in the sys_ux_list table by selecting **New**.
3. On the form, fill in the fields.
   For more information, see UX List form.
4. Select **Submit**.

Result
The lists under the Universal Task list category are added.

UX List Form SOW

Learn about the fields of the UX List form. Use this form to create additional lists in the Lists menu of Service Operations Workspace.

You create additional lists in the Service Operations Workspace to organize tasks logically, improve navigation, reduce clutter, support role-specific views, and enhance compliance tracking.

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UX list fields

Field	Description
Title	Displays the name of the list category in the workspace.
Application	Application scope should be set to Universal Task.
Order	Order in which you want to display the list category in the workspace.
Category	Category under which the list would be displayed in the workspace.
Active	Option to enable the display of this category in the workspace.
Table	Source table of the list.
Configuration	By default, this field is set to **Default-SOW**.
Conditions	Conditions to filter the records of the source table.
Columns	Columns of the table that must be displayed in the list in the workspace.
Group by column	Attribute that would be used to group the list of records by.
View	View to determine which columns are displayed in the list in the workspace. **Note:** If you select a view, the **Columns** field is inactive.

Universal Task for external users

Enable external users to have access to the tasks assigned through Universal Task.

Users that aren't yet part of your organization are external users (snc_external). For example, new-hires who didn't yet start working for the company.

The following points must be considered to enable Universal Task for the external users.

- The Explicit Role (com.glide.explicit_roles) plugin must be installed to assign external and internal roles to the users. For more information, see .
- When creating a Universal Task, all pre-defined task types like Upload Documents, Mark When Complete, Checklist, and Collect Employee Input are available for external users except for Submit Catalog Item. If you try to create a Submit Catalog Item, you will get an error.
- All the Universal Task widgets, tables, and ACLs are enabled for both internal and external roles.
- The portal and pages where the Universal Task is embedded must also be supported for the external users. For example,

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- Employee Service Center where the widgets are added.
- The **To-Do** tab of the Employee Service Center.
- The hrm_todos_page where the Universal Task is displayed.

Universal Task reference

You can refer to the reference topics to learn more about the universal tasks, including lists and forms.

Universal Task form

Universal Task form to create a task record.

Universal Task form fields

Field	Description	
Number	Unique number that is generated for the Universal Task. The Universal Task number starts with UNT.	
Parent	Number of the parent case or request.	
Parent Assignment Group	Group assigned to the parent case or request.	
Parent Assigned to	Agent primarily responsible for working on the parent case or request.	
Type	Type of task being assigned. The available options are: • Submit Catalog Item • Upload Documents • Upload Documents • Mark When Complete • Checklist • Collect Employee Input	
	Submit Catalog Item	In the **Catalog item** field, select a catalog item.
	Upload Documents	Use the **Description** field to provide instructions or details of documents to be uploaded.
	Mark When Complete	Use the **Description** field to provide details about this task. **Note:** The state of the task will change to **Complete** after the employee completes the task.
	Checklist	In the **Checklist** section, add the checklist items. For detailed information, see Create a checklist
	Collect Employee Input	In the **Employee form** field, select the employee form that the user will fill out.

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Universal Task form fields (continued)

Field	Description	
		Note: Employee forms can be built using the survey designer. See Create an employee form for more information.
	URL	In the **URL** field, specify a URL that will be displayed in the task that is assigned to the user. In the **Short description** field, provide more details about the URL.
	To know more about the function of each type, see Universal Task types	
Employee form	Mandatory employee form. **Note:** This field appears only if the Collect Employee Input task is selected in the **Type** field.	
Survey instance	Link to the completed employee form. **Note:** This field appears only if the Collect Employee Input task is selected in **Type** field, and the value of the **State** field is complete.	
Template	Task template to auto-fill the task form.	
State	State of the Universal Task. The available state settings are: • New • Work In Progress • Complete • Cancelled	
	New	Default state when the task is a draft. Tasks at this state are only visible to the agent
	Work in Progress	Task is assigned to and visible to the employee.
	Complete	Task has been completed by the employee.
	Cancelled	Task has been cancelled before completion.
Priority	Value that identifies how quickly the service desk should address the request. The available options are: • Critical • High • Moderate • Low	

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Universal Task form fields (continued)

Field	Description	
	Critical	Highest priority for urgent or time-sensitive tasks.
	High	Tasks that are important but not urgent.
	Moderate	Tasks that should be completed at some point.
	Low	Optional tasks.
Assignment group	Group assigned to the Universal Task. This field is available for the **Mark When Complete** and **Checklist** task types. Other tasks types require a mandatory update of the **Assigned to** field with the **Assignment group**. **Note:** Email notifications are sent only for the two task types.	
Assigned to	Employee assigned to the Universal Task.	
Due date	Expected date for the employee to complete the task.	
Watch list	Users to receive notifications when there is any change in the task status.	
Short description	Brief description of the request	
Description	Detailed description of the request	
Additional comments (Customer visible)	More information about the change. The information in this field is visible to the customer.	
Work notes	Information about how to resolve the Universal Task or steps taken to resolve it, if applicable. This note is for internal use. The work notes information is not visible to customers.	

Universal Task Configuration form

Use the Universal Task Configuration form to associate Universal Task to your service.

Universal Task Configuration form

Field	Description
Parent table	Department-specific table that the universal task should be associated to.
Task Types	Task types that are available to the agents for use.
Default Assigned to	User field on the parent table that the universal task must be assigned to on creation. **Note:** Agents can still change the value of **assigned to** at the time of creating a universal task.

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Employee form

Use the employee form to create a new employee form record for Universal Task

Employee Form

Field	Description
Name	Name of the employee form.
Description	Description of the employee form.
Parent table	Parent table available for the employee form. Parent table is a department-specific table associated to a universal task. For more information configuring a parent table, see Configure Universal Task for your service. **Note:** • Only the tables that are configured for Universal Task with **Collect Employee Input** task type can be selected. • You can select a parent table only if you have write access to it.
Active	Option to activate the employee form for use.
State	State of the form. This field gets auto-populated.

Employee Input Task Configuration form

Use the Employee Input Task configuration form to configure the roles that can view completed Universal Task employee form.

Employee Input Task Configuration

Parent table	Department-specific table that the universal task should be associated to. **Note:** You can only select the tables that have been configured for Universal Task.
Response view roles	Read only roles. The Response View role in Universal Task (part of the Universal Request framework) grants users read-only visibility into Universal Task records without giving them permission to modify tasks or their metadata.
Condition script	Script to add conditions to the role, if any
Application	Name of the application scope. This field is auto-selected.

Universal Task template form

Use the Universal Task template form to create a Universal Task template.

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Universal Task template form

Field	Description
Name	Name of this template.
Parent table	Table that this template applies to. By default, the template is applicable to all tables.
Short description	Description of the template. **Note:** Adding content to this field does not add that content to the **Short description** field of the forms that use this template.
Template	Content that automatically populates records that are based on this template. Select a field from the specified table in the left column. Then enter the data to automatically populate in the right column.
Application	Field that is automatically set based on the scope of your organization.
Active	Option for making the template available for use. A template must be active to be used.

SharePoint Online Search Connector

The ServiceNow SharePoint Online Search Connector offers a consumer-grade search configuration to manage your information resources.

Important: Starting with the Yokohama release, SharePoint Online Search Connector is being prepared for future deprecation. It is hidden and no longer activated on new instances but continue to be supported. For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

As search is the key to productivity, SharePoint Online Search Connector (SPOC) helps your employees to search and discover content from the ServiceNow employee experience. You can index content from multiple sites, enabling employees to find the relevant information through Employee Service Center, Service Portal, Now Mobile app, and Virtual Agent.

Important: Currently, automatic migration path between SharePoint Online Search Connector and External Content Connectors is not available. For migration guidance, see the Migration Guide: SharePoint Online Search Connector to External Content Connectors [KB1791102] article in the Now Support knowledge base.

For additional instructions on how to get started with **External Content Connectors**, see

- External Content Connectors.
- Exploring External Content Connectors.
- Configuring External Content Connectors.

Visit the ServiceNow Store website to view the application and for information about submitting requests to the store. For cumulative release notes information, see the ServiceNow Store version history release notes.

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Additional resources

- Learn more about what's new and changed, see the HR Service Delivery release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying features at Employee Service Management.
- Access real-time courses, self-paced training, and career resources at ServiceNow University
- Find useful resources related to your role and explore best practices at the Customer Success Center.
- Connect with other Customer Service Management users at Now Community.

Related topics

SharePoint Online Search Connector reference

External Content Connectors

SharePoint Online Search Connector prerequisites

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For detailed instructions on how to get started with **External Content Connectors**, see

- External Content Connectors.
- Exploring External Content Connectors.
- Configuring External Content Connectors.

As search is the key to productivity, SharePoint Online Search Connector (SPOC) helps your employees to search and discover content from the ServiceNow employee experience.

How SharePoint Online Search Connector works

Here's an overview of how SharePoint Online Search Connector works:

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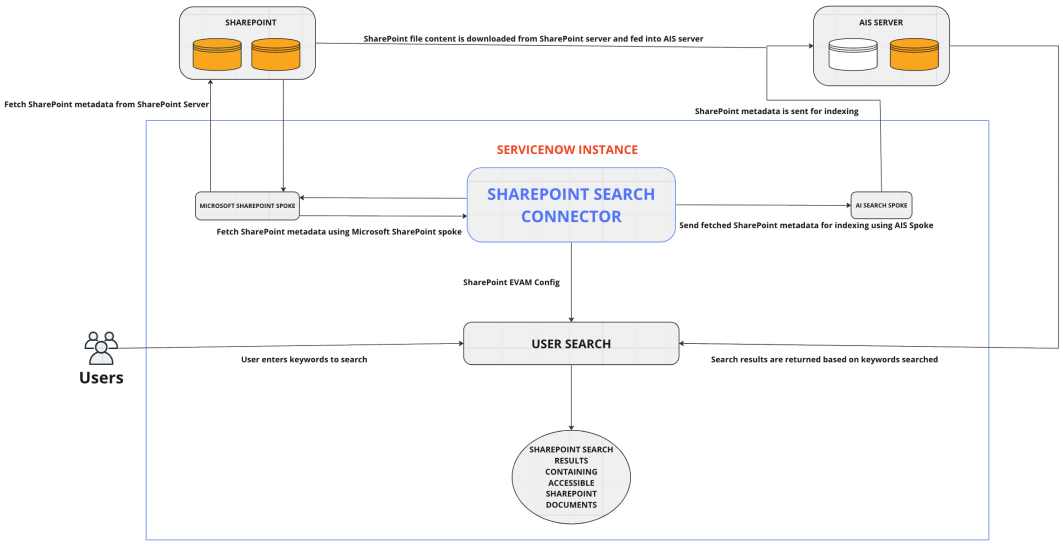
SPOC overview



Use the SharePoint Online Search Connector to:

- Create better search and discovery experiences for the Microsoft SharePoint content, confirming that your employees can quickly find the information they need.
- Enable support across multiple channels like Employee Service Management, Service Portal, Now Mobile app, and Virtual Agent.
- Integrate with the ServiceNow® AI Search for improved relevance and personalization.
- Search and find relevant information and drive business outcomes.

Required plugins

Activate the following plugins and apps:

- Employee Center Pro
- Microsoft SharePoint spoke
- AI Search spoke
- Microsoft Entra ID spoke

Verify that the AI Search engine is enabled. External Content for the AI Search plugin (com.glide.ais.external_content) must have a ServiceNow subscription.

For more information, see Setting up SharePoint Online Search Connector.

Things to remember

- The SharePoint Online Search Connector is only compatible with the AI Search engine, not with the Zing search engine.
- The content types supported by the AI Search engine, such as, DOTX, HTM, XLSX, DOT, PPTM, DOCX, PPTX, TXT, PDF, POT, PPT, POTX, DOC, HTML, and XLS are supported in SharePoint Online Search Connector along with ASPX.
- The AI Search file size up to 25 MB is applicable.
- The languages supported are English, Spanish, French, Japanese, and German.
- SharePoint Online Search Connector supports SharePoint groups The groups are **Members**, **Owners**, and **Visitors**. The groups have different permission levels.

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- **Members**: Can edit a document residing in the site.
- **Owners**: Can create, edit, and delete documents residing in the site.
- **Visitors**: Can read a document residing in the site.

- SharePoint Online Search Connector is enabled to read users from the Microsoft 365 groups.

  Note: It only reads and pulls data from the Microsoft 365 **Members** group.

- SharePoint Online Search Connector doesn't read users from your Active directory.
- SharePoint Online Search Connector supports **Everyone except external users** site permissions.
- As an admin, you can use the following enhancements for more flexibility and control:
  - **Flexible permissions**: Select the **Sites.FullControl.All**, **Sites.Read.All**, or **Sites.Selected** permissions while configuring the connector.
  - **Selective indexing**: Index sites and subsites selectively by excluding some URLs and subsites, which have confidential information.
  - **Index published versions**: Control and limit the indexing only to the published files, confirming employees access the verified and finalized versions and not the drafts or unfinished documents.

    Note: If you have an existing connector without these enhancements, delete the existing connector, create a new connector, specify the URLs for indexing and exclusion, and define the site permissions for more effective content control and governance.

- Two SharePoint instances cannot be connected to one ServiceNow instance simultaneously.
- The Microsoft Entra ID spoke setup is required along with the Graph and REST connection setups to connect your ServiceNow instance to a Microsoft SharePoint tenant.

Related topics

SharePoint Online Search Connector reference

Setting up the SharePoint Online Search Connector

Set up the SharePoint Online Search Connector by configuring and connecting the Microsoft SharePoint tenant with your instance. Validate the connection to avoid any setup failures before indexing the sites for search.

Configure the Microsoft SharePoint tenant

Configure your Microsoft SharePoint tenant to get started with the SharePoint Online Search Connector.

Before you begin

As a Microsoft SharePoint administrator, create a custom application by specifying the root URL (`https://<sitename>.sharepoint.com`), app domain, redirect URL, and other settings.

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Important: Starting with the Yokohama release, SharePoint Online Search Connector is being prepared for future deprecation. It's hidden and no longer activated on new instances but continue to be supported.

For deprecation details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Ensure you complete the following prerequisites.

- Follow the procedure to Configure OAuth application in Microsoft Azure.
- Follow the procedure to Set up Microsoft Entra ID spoke. Microsoft Entra ID spoke (formerly known as Microsoft Azure Active Directory spoke) is a dependent plugin that needs to be set up before indexing the users.
- Understand how to Configure Microsoft SharePoint Graph connection.
- Log in with your admin credentials to grant permissions.

Role required: admin

About this task

Complete the following procedure from your Microsoft SharePoint account. For more information on creating and configuring custom applications, see the SharePoint development

Note: When the permissions assigned in the Azure apps have privilege issues, the following error message appears: `Error message: Method failed: (/_api/web/XXXXXXX) with code: 401 - Invalid username/password combo.` Address this issue with the instructions available in KB1117977.

When you want the search results to display only the published versions of the documents, ensure you select **Application permissions** instead of the **Delegated permissions** while configuring the permissions explained in Microsoft SharePoint Online Spoke.

Note: Admins can limit indexing to the published versions only, ensuring that drafts or unfinished work aren't displayed in the search results.

Procedure

1. Navigate to **Azure** > **Active Directory** > **App registrations** > **All applications**, and select an existing app.
   Use an existing application or create an application.

Configured permissions

2. Navigate to **App registrations** > **API permissions**, and click **Add a permission**.
3. Select one of the following options:
   a. Navigate to **Microsoft Graph** > **Delegated permissions** for Graph.
   b. Navigate to **Microsoft Graph** > **Application permissions** for Graph.
   Add the **Sites.ReadWrite.All** permission from the Sites list. The Sites.ReadWrite.All permission helps with subscription creation.

   Add the **User.Read** permission from the Users list.

   These user permissions are used to crawl the Microsoft SharePoint data later.
4. Navigate to **Sharepoint** > **Application permissions** > **Sites**, and select **Sites.FullControl.All**, **Sites.Read.All**, or **Sites.Selected** for REST.
   Enable the **Sites.Selected** permission by performing the following steps.

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a. In the Microsoft Azure application, enable the **Sites.Selected** and the **User.Read.All** permissions.
Use any API client to provide read access for the following site collections.
   - Application X that is connected to a ServiceNow instance and has the **Sites.Selected** permission.
   - Application Y that is an admin application and has the **Sites.Full.Control** permission for Graph connection.

b. Get a bearer token by calling the API method *`https://login.microsoftonline.com/{Tenant Id}/oauth2/v2.0/token`*.
Payload:

```
client_id={App Y client id}
&scope=https%3A%2F%2Fgraph.microsoft.com%2F.default
&client_secret={App Y client secret}
&grant_type=client_credentials
```

c. Pass the token received in step b as the authorization token while calling the API method *`https://graph.microsoft.com/v1.0/sites/{site id}/permissions`*.
Payload:

```
{
"roles": [
"read"
],
"grantedToIdentities": [
{
"application": {
"id": "App X client id",
"displayName": "App X"
}
}
]
}
```

5. Ensure you configure the required API permissions as shown in the following image:

Configured permissions list

For more information, see Configure Microsoft SharePoint Graph connection.

6. Click **Grant admin consent**, select **Yes**, and click **Save and Continue**.
7. Navigate to **Authentication** > **Web** > **Redirect URLs** and add the URL in this format `https://<your Servicenow instance URL>/oauth_redirect.do`, for example, https://eesharepoint.example.com/oauth_redirect.do and click **Save**.
8. Navigate to Microsoft SharePoint Online Spoke and register the certificate and secret for your application.
9. Click **Add user** on the Microsoft admin portal, specify the user details, and click **Finish**.

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Note: The search crawls the sites that you can access. Ensure that you select the user with appropriate permissions for only the required content. For more information, see user permissions. Selecting a high-level user can import more documents than you want to import.

For more information, see Granting access via Azure AD App-Only.

What to do next

Complete the integration from your ServiceNow AI Search account. For more information, see Integrate the Microsoft SharePoint search sources with the AI Search profiles.

Integrate the Microsoft SharePoint search sources with the AI Search profiles

Link search sources to a search profile to specify the content users can search through the linked search profile.

Before you begin

Role required: admin

Procedure

1. Navigate to **Search Applications** > **Search Application Configurations** (sys_search_context_config).
2. Update the following values, for **Virtual Agent Default Search Application**
   - Search Engine: **AI Search**.
   - Search Profile: **ESC Portal Default Search Profile**. This dynamic field value is visible after you change the **Search Engine** value.

   For more information, see Create a search application configuration for AI Search.

What to do next

Connect the ServiceNow® instance with the Microsoft SharePoint tenant. Complete the steps from your ServiceNow® account. For more information, see Connect your ServiceNow instance to a Microsoft SharePoint tenant.

Connect your ServiceNow instance to a Microsoft SharePoint tenant

Connect your ServiceNow instance with a Microsoft SharePoint tenant. Create custom ServiceNow OAuth connections for Microsoft SharePoint to authenticate ServiceNow requests.

Before you begin

- Ensure that you have working knowledge of the SharePoint developer program tools and other resources to configure the application.
- Ensure that you're aware of the ServiceNow® integrations.

Role required: sn_sp_con.admin and admin.

Procedure

1. Navigate to **ServiceNow instance** > **System OAuth** > **Application Registry**.
2. Click **New**.
   The system displays the message `What kind of OAuth application?`
3. Select **Connect to a third-party OAuth Provider**.
4. Create the following registries:

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a. On the Graph connection form, fill in the fields.
For a description of the field value, see Graph connection form.

b. On the REST connection form, fill in the fields.
For a description of the field value, see REST connection form.

c. Right-click the form header and click **Save**.

OAuth Entity Profile

5. Navigate to the OAuth Entity Profiles [oauth_entity_profile] table to find the following entries:
   - `<Graph application registry name>.default_profile`
   - `<REST application registry name>.default_profile`

   Two system-generated OAuth entity profiles (REST and Graph) are created in the OAuth Entity Profiles [oauth_entity_profile] table. For more information, see Specify an OAuth profile.

OAuth Entity Scopes

6. Insert a row with the following values in the OAuth Entity Scopes [oauth_entity_scope] table:

OAuth Entity Scopes

Graph	REST
Name: Any name of your choice	Name: Any name of your choice
OAuth Provider: Graph Application Registry record	OAuth Provider: REST Application Registry record
Application: Global	Application: Global
(For Delegated permissions) OAuthscope: `offline_access https://graph.microsoft.com/Sites.ReadWrite.All` (For Application permissions) OAuthscope: `https://graph.microsoft.com/.default`	OAuth Scope:`https://<instance name>.sharepoint.com/`

For more information, see Specify an OAuth scope.

OAuth Entity Profiles Scopes

7. Insert a row with the following values in the OAuth Entity Profiles Scopes [oauth_entity_profile_scope] table:

OAuth Entity Profiles Scopes

Graph	REST
OAuth Entity Profile: Graph entity profile generated in the OAuth Entity Profiles [oauth_entity_profile] table.	OAuth Entity Profile: REST entity profile generated in the OAuth Entity Profiles [oauth_entity_profile] table.

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Graph	REST
OAuth Entity Scope: Select the graph OAuth Entity Scope [oauth_entity_profile_scope] table.	OAuth Entity Scope: Select the REST OAuth Entity Scope [oauth_entity_profile_scope] table.
Application: Global	Application: Global

Credentials

8. Navigate to **Connections & Credentials** > **Credentials**, and create the OAuth 2.0 credentials:

   a. On the Graph or REST credential forms, fill in the fields.

OAuth 2.0 credential form

Field	Description
Name	Name of your choice.
OAuth entity profile	(For Graph) Graph entity profile identified. (For REST) REST entity profile identified.

   b. Right-click the form header and click **Save**.

> **Note:** For more information on Entities, Connection & Credential Aliases, see Configure the SharePoint Graph Root Site Subscription connection and credential alias record.

Connection

9. Navigate to **Connections & Credentials** > **Connection**, and click **New** to create HTTP(s) connections for the following **Graph** or **REST**.

   a. On the form, fill in the fields.

Connection form

Field	Description
Name: Any name of your choice for Graph	Name: Any name of your choice for REST
Credentials: Select the graph **Credentials**	Credentials: Select the REST **Credentials**
Connection alias: `sn_sp_spoke.MicrosoftSharePointGraph`	Connection alias: `sn_sp_spoke.MicrosoftSharepointOnlin`
Connection URL: `https://graph.microsoft.com/v1.0/`	Connection URL: `https://<Host URL of you SharePoint instance>/`
Domain: Global	Domain: Global

   b. Right-click the form header and click **Save**.

For more information, see Connections and Credentials and Create an HTTP(s) connection.

Tenants

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10. Navigate to **Microsoft Sharepoint Online** > **Tenants.**

    a. Click **New** to create **Graph** or **REST** connections.

    b. On the form, fill in the fields.

Tenant connection form

Field	Description
Name	Name of your choice.
Alias	For Graph: `sn_sp_spoke.MicrosoftSharePointGraph` For REST: `sn_sp_spoke.MicrosoftSharepointOnline`
SharePoint root URL	Root URL as `<SiteName>.sharepoint.com`
Tenant ID	Tenant ID required for the Graph or REST connection.
Domain	Global

    c. Right-click the topic header and click **Save**.

For more information, see Define tenants, Configure the SharePoint Graph Root Site Subscription connection and credential alias record, and Create aliases for multiple tenants

Certificates

11. Navigate to **System definition** > **Certificates** > **Microsoft SharePoint Online Certificate**.

    a. Attach the file generated Java Key Store certificate on the Azure AD portal.
    For more information, see Attach a Java Key Store certificate.

    b. Update the Key store password with the password of the `Java Key Store (.jks)` file.

    c. Update the type to the Java key store.

    d. Right-click the topic header and click **Save**.

For more information, see Configure the SharePoint Graph Root Site Subscription connection and credential alias record.

JWT keys

12. Navigate to **System OAuth** > **JWT keys** > **Microsoft SharePoint Online JWT Keys**.
    a. Update signing key with password of `Certificate (.cer)` file.
    b. Right-click the topic header and click **Save**.
13. Navigate to **System OAuth** > **JWT providers** > **Microsoft SharePoint Online JWT Provider**.
    a. Update the **aud** claim with `https://login.microsoftonline.com/<Tenant-id>/oauth2/token`.
    b. Update the **iss** and **sub** claim with the respective client ids on the Azure ad app registrations.
    c. Click **Save**.

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Connection

14. Navigate to **Connections & Credentials** > **Connection**.

    a. Open the REST connection record and on the **Attributes** tab, specify the Base 64 encoded certificate **Thumbprint**.

    > **Note:** The SharePoint app thumbprint value is hex encoded. Encode the same in the Base64 format in the connection record.

    b. Select the following **Credentials** option:

    - (For **Graph**): Navigate to the [Credentials] table (oauth_2_0_credentials), open **Graph**, and click **Get OAuth Token**.

      Ensure that you log in to your Microsoft SharePoint instance with the credentials of the user that you created to get the OAuth token for the Graph connection. Store the credentials in the instance.

    - (For **REST**): Go to the [Credentials] table (oauth_2_0_credentials), open **REST**, and click **Get OAuth Token**.

      Ensure that you log in to your Microsoft SharePoint instance with the Tenant administrator credentials to get the OAuth token for the REST connection. Store the credentials in the instance.

      Validate the credential to avoid any configuration failure. For more information on validating the SharePoint connection, see Validate the Microsoft SharePoint connection.

    c. Click **Save**.

Trusted Domains

15. Go to **Trusted Domains** table (sn_ais_spoke_trusted_domains) and click **New** to create a domain record.

    a. On the form, fill in the fields.

    Domain record form

Field	Description
Name	Name of your choice.
Domain	<Host URL of your Microsoft SharePoint tenant>.

    b. Click **Save**.
    For more information, see Set up the AI Search spoke.

    > **Note:** Ensure you create a trusted domain record for each tenant, when there are multiple tenants.

Sharepoint Ingest User

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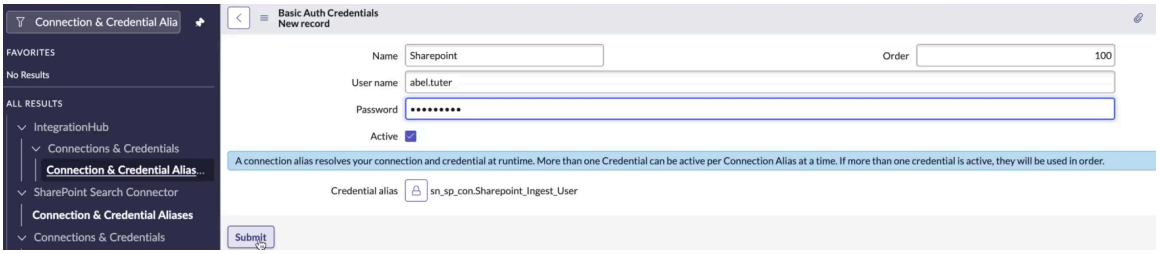
16. Navigate to **Connections & Credentials** > **Connection & Credential Aliases** > **Sharepoint Ingest User** (sn_sp_con.Sharepoint_Ingest_User).

    a. Click **New** on **Credentials** to create a **Basic Auth Credential** for ingesting external content by AIS.

    b. Specify the **User name** and **Password** of the user (sys_user) who has the **ais_external_content** role.



> **Note:** In the example screenshot, the user `abel.tuter` is the sys_user who has the ais_external_content role assigned.

    c. Click **Submit**.
    For more information, see Create aliases for multiple tenants.

    d. Configure the AI Search server connection before you proceed with the next steps.

    The Entity View Action Mapper (EVAM) configuration is available by default with Employee Center Pro version 32.0.

    For more information on EVAM definition, see Create an EVAM action definition and Create a multi-data source list display in Entity View Action Mapper.

Result
Your configuration is complete.

What to do next
Validate the Microsoft SharePoint connection to rule out any configuration failure before indexing a sample site.

Validate the Microsoft SharePoint connection

Run a validation after you connect your ServiceNow instance with a Microsoft SharePoint tenant to check for any errors in the configuration.

Before you begin
Role required: admin

About this task
The validation rules out any configuration failure and ensures a seamless setup process.

Procedure
1. Navigate to **System UI** > **UI Pages** > **Sharepoint utility**.
2. Select **Try it** to navigate to the SharePoint Connection validation page.
3. Enter the required details and select **Validate**.
   The errors, if any, are displayed in the Response section.

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4. Check the **Table name** links and fix the errors based on the **Current Value** and **Expected Value** displayed in the Response section.

   If any information is missing, the Error field shows the data.

   If there are no errors, the Response section displays a successful validation.

What to do next

Index sites for search. For more information, see Index sites for search.

Index sites for search

Configure the SharePoint Online Search Connector to crawl the content from the eligible sites, subsites, drives, and more.

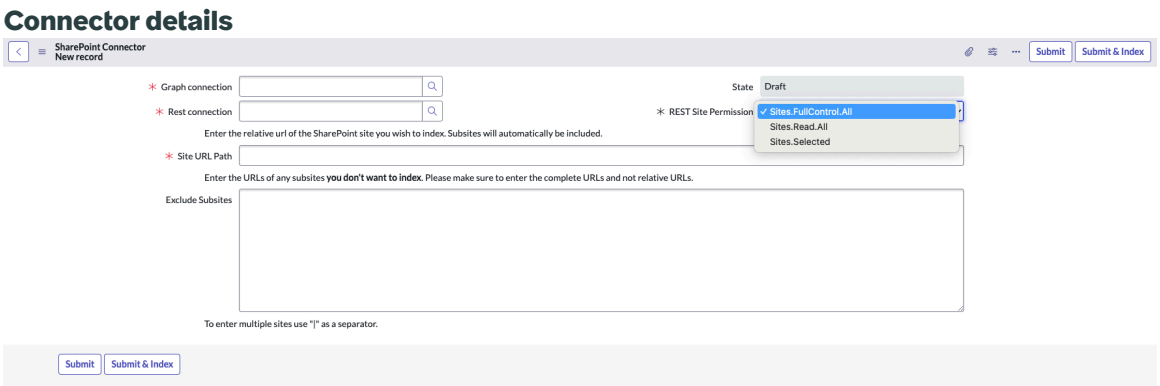
Before you begin

- Verify that you have a basic knowledge of Microsoft Azure and Microsoft SharePoint functionality.
- Work with a Microsoft SharePoint administrator to understand the set of sites for indexing.
- Activate SharePoint Online Search Connector from the ServiceNow store.

Role required: sn_sp_con.admin or admin

Procedure

1. Navigate to **SharePoint Online Search Connector** > **SharePoint Connectors**.
2. Click **New**.



3. On the form, fill in the fields.

Connection-mapping details form

Field	Description
Graph connection	Connection for graph. Use the graph tenant record.
REST connection	Connection for REST. Use the Rest tenant record.
Site URL Path	Value of the relative URL of the Microsoft SharePoint site for indexing. For example, if your site URL is https://

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Field	Description
	sncplatform.sharepoint.com/Company/Medicalbenefits, the relative URL of the site is `Company/Medicalbenefits`. **Note:** This URL is case-sensitive. Subsites are automatically indexed. See SharePoint Online Search Connector search results.
State	State of the indexing.
REST Site Permission	Use one of the following site permissions to manage access to the SharePoint. ○ **Sites.FullControl.All**: Provides the full control to SharePoint sites for the signed-in user. Sites, subsites, files, and user groups are indexed with this option. ○ **Sites.Read.All**: Provides only the read access to the files for the signed-in user. This option is the default value. Only files and user groups are indexed with this option. ○ **Sites.Selected**: Provides selected site control with selected roles to users. Only files and user groups are indexed with this option.
Site role	Use one of the following options to manage access control. ○ **Full control** ○ **Read** ○ **Write** This field appears only when **Sites.Selected** is selected from **REST Site Permission**.
Exclude Subsites	List of URLs that are excluded from indexing. These URLs are not indexed by the AI Search and are not displayed in the search results. You can add multiple sites with **|** as a separator. Enter the URLs of any subsites you don't want to index. **Note:** Ensure you specify the complete URLs and not relative URLs.

4. Click **Submit & Index** to validate and start indexing the site.
   When you submit the site, the indexing includes the related subsites.
5. Track the indexing progress from the **Search connector** record state.
6. Proceed to see the **Indexed Sites** related list.

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The indexed site list contains the following information:

Indexed site form

Field	Description
Name	Subsite name.
Display name	Subsite display name.
Web URL	Web URL of the Microsoft SharePoint site.
Description	Description of the subsite.
Subsites fetch state	Status of the subsite crawl, such as, **Pending** and **Complete**.
Drives fetch state	Status of the drives crawl, such as, **In progress** and **Complete**.
State	Overall crawl status.
Marked for deletion	Value is **False** to keep the subsite. Value is **True** to delete the subsite.

To know more about how to exclude sites, see Exclude sites from indexing.

Result

The sites, subsites, folders, and files are indexed and displayed in your search results. Use filters to verify the progress and manage the indexing status by navigating to **SharePoint Online Search Connector** > **SharePoint Sites**.

After site indexing is complete, you can search and discover the site content from multiple channels, like Employee Service Center, Service Portal, Now Mobile app, and Virtual Agent. For more information, see SharePoint Online Search Connector search results.

What to do next

Remove Index: Select the indexed site and click Remove Index to remove the site from indexing. On success, all the sites, drivers, and files are removed from the respective tables and the connector is updated to read only with the Deleted status.

Exclude sites from indexing

Index sites and subsites selectively by excluding some URLs and subsites, which have confidential information.

Before you begin

Specify a list of subsites that you want to exclude from the SharePoint Online Search Connector indexing. Work with a Microsoft SharePoint administrator to understand the set of sites to exclude from indexing.

Role required: AI search administrator

Procedure

1. Navigate to **SharePoint Online Search Connector** > **SharePoint Connectors**.
2. Click **New**.
3. Follow the instructions Index sites for search.

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4. Specify the URLs list in the **Exclude Subsites** field.

> **Note:** Specify the complete URLs and not relative URLs. You can add multiple sites with | as a separator.

Result
These URLs are not indexed by the AI Search and are not displayed in the search results.

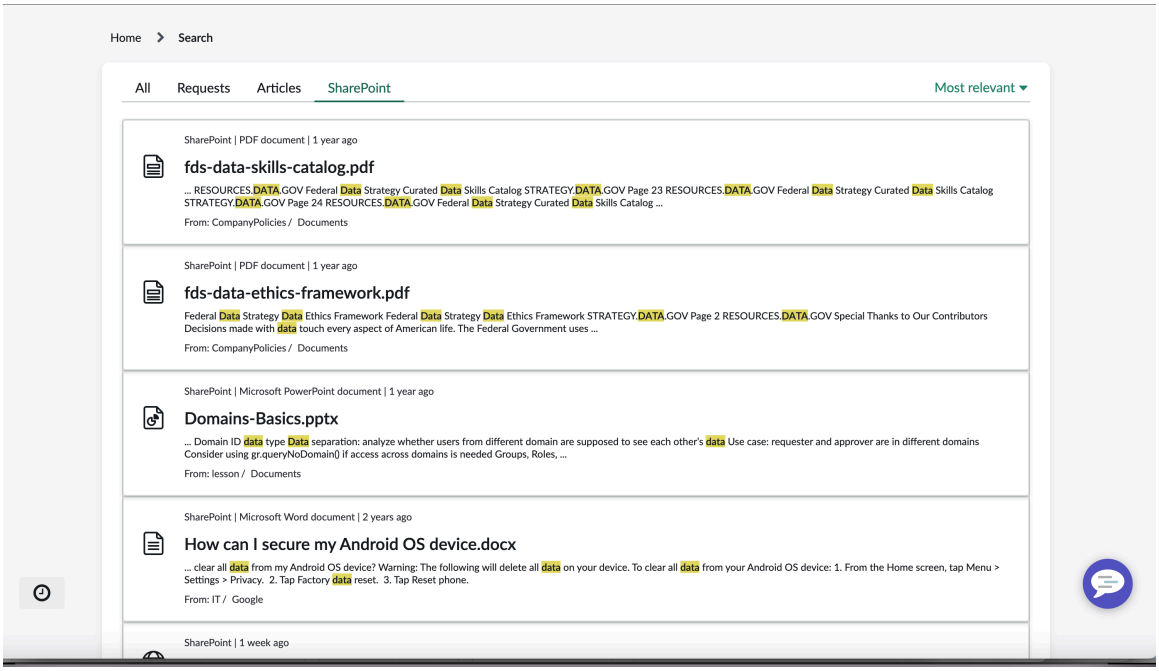
What to do next
Remove Index: Select the indexed site and click Remove Index to remove the site from indexing. On success, all the sites, drivers, and files are removed from the respective tables and the connector is updated to read only with the Deleted status.

SharePoint Online Search Connector search results

Learn about the SharePoint Online Search Connector searches and the results displayed for your search requests.

This example shows the SharePoint Online Search Connector search results page. Based on your settings, the layout and appearance may vary. For more information, see View configurations, view templates, and configuration bundles for EVAM.

Search results



For more information, see the Using AI Search page.

SharePoint Online Search Connector reference

The reference topics for the application provide additional information about the SharePoint Online Search Connector settings, content types, and features.

Crawl constraints
For more information on crawl types, see Microsoft SharePoint crawl types.

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- The time of crawling may vary, based on the content size.
- The documents are available for search after a successful crawl. For more information on crawl types, see Microsoft SharePoint crawl types.

Note: For the latest information on the content types and constraints, see AI Search documentation.

Scheduled job frequency

The default-scheduled job frequency is set to maximize the performance. For more information, see SharePoint Online Search Connector scheduled jobs.

Look up file permissions

When Look up File Permissions action returns a blank or null array, you may face access issues. To resolve the access issue, use the Client Credentials type instead of Authorization Code and provide the API permissions on the application level where the type is application, for more information, see KB1642515.

Content types

- The content types supported by the AI Search are supported in the SharePoint Online Search Connector.
- The AI Search file size maximum of 25 MB applies.
- The languages supported are English, Spanish, French, Japanese, and German.

Reduce batch size value and execution time

The *sn_sp_con.sharepoint_batch_size* property controls the size of the batch in SharePoint and the default value is 200. You can update this value to reduce the batch size and the execution time of the Index flows. Navigate to System Properties *sys_properties_list.do*, search for *sn_sp_con.sharepoint_batch_size*, and reduce the value.

Delegated permissions and Application permissions

When you want the search results to display only the published versions of a document, ensure you select **Application permissions** instead of the **Delegated permissions** while configuring the permissions explained in Configure the Microsoft SharePoint tenant. Admins can limit indexing only the published versions only, ensuring that drafts or unfinished work are not displayed in the search results.

Microsoft SharePoint crawl types

Crawling gathers the content for search. To retrieve information, the crawl operation connects to the content sources by using connectors.

To create a modern search experience, the search system must first crawl the content from the multiple content sources. From content sources, specify the content type, the starting URLs, and the depth of content to index.

After retrieving the content, the Crawl component passes the crawled items to the content processing component.

- Full Crawl: Crawls, processes, and indexes every item in the content source, regardless of the last crawl status.
- Incremental Crawl: Crawls, processes, and indexes only the items that are newly created, changed, or updated since the last crawl. This option takes less time and re-indexes only the changes.

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SharePoint Online Search Connector scheduled jobs

Create a scheduled job to fetch each entity such as sites, drives, file metadata, and file content.

You can change the frequency of the scheduled jobs. The list of the scheduled jobs is as follows:

- SharePoint Online Search Connector: Ingest Sites
- SharePoint Online Search Connector: Ingest Drives
- SharePoint Online Search Connector: Ingest Files
- SharePoint Online Search Connector: Index Content
- SharePoint Online Search Connector: Delete Content
- SharePoint Online Search Connector: Renew Subscription
- SharePoint Online Search Connector: Check Connector Status
- SharePoint Online Search Connector: Incremental Pull
- SharePoint Online Search Connector: Process Notification
- SharePoint Online Search Connector: Ingest Permissions
- SharePoint Online Search Connector: Insert New Users

Note: The default frequency for the scheduled jobs is set to maximize the performance.

Graph connection form

The following are the available fields in the Graph connection form to create a Graph connection for Microsoft SharePoint connectivity configuration.

Graph connection form

Field	Description
Name	Name to identify the graph connection.
Client ID	Client ID of your application.
Client secret	Client secret of your application.
Default grant type	For Delegated permissions, authorization code provided for automatic access to users. For Application permissions, client credentials provided for automatic access to users.
Application	Global.
Authorization URL (for Delegated permissions only)	`https://login.microsoftonline.com/<Tenant ID>/oauth2/v2.0/authorize`.
Token Revocation URL (for Delegated permissions only)	`https://login.microsoftonline.com/<Tenant ID>/oauth2/v2.0/token`.
Token URL	`https://login.microsoftonline.com/<Tenant ID>/oauth2/v2.0/token`

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Graph connection form (continued)

Field	Description
Redirect URL	`https://<ServiceNow instance URL>/oauth_redirect.do`. For example, https://eesharepoint.example.com/oauth_redirect.do .

REST connection form

The following are the available fields in the REST connection form to create a REST connection for Microsoft SharePoint connectivity configuration.

Rest connection form

Field	Description
Name	Name to identify the rest connection.
Client ID	Client ID of your application.
Client secret	Client secret of your application.
OAuth API script	`OAuthUtilSPJWTOnline` An OAuth API script facilitates authentication and authorization for accessing an API using the OAuth protocol.
Default grant type	Client credentials.
Application	Global.
Token URL	Indicates the token URL, for example, `https://login.microsoftonline.com/<Tenant ID>/oauth2/token`
Redirect URL	Indicates the ServieNow instance redirect URL `http[s]://<servienow-instance>:<port>/oauth_redirect.do`. For example, `http[s]://custinstance.service-now.com/oauth_redirect.do`.

Domain separation and SharePoint Online Search Connector

Domain separation is unsupported for the SharePoint Online Search Connector .

Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

For more information on support levels, see Application support for domain separation .

SharePoint Online Search Connector overview

SharePoint Online Search Connector enables your employees to search for and discover content from the ServiceNow® platform. Indexing content from multiple sites enables you to find the right answers through the Employee Service Center, Now Mobile app, and Virtual Agent.

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Related topics

- Domain separation for service providers

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